Alcester Market Town

Destination Benchmarking Survey 2017

FINAL REPORT

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ALCESTER MARKET TOWN

DESTINATION BENCHMARKING SURVEY 2017

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Executive Summary of Results

In order to meet the objectives, a face to face questionnaire survey was carried out by a team of professional Market Research interviewers. The Alcester Market Town Benchmarking Survey was carried out between July and September 2017 covering some 17 days, with interviewing taking place both at weekends and weekdays. A total of 216 interviews with visitors to Alcester were carried out during the survey period.

Interviewing was undertaken at four locations within the town in order to gain a cross section of visitors to Alcester

The following summary is based on the overall findings from the main benchmarking report.

GENERAL FINDINGS

- Two thirds (66%) were day visitors from home, on a par with the previous survey in 2012. Day visitors from a holiday base outside of Alcester accounted for 17% of visitors, lower than in 2012 (23%). Encouragingly, there has been an increase in the number of staying visitors since 2012. A sixth (17%) of all visitors were staying overnight in commercial or non-commercial accommodation within Alcester, up from both 2007 and 2012 (11% and 12% respectively).

- Overall, over half (57%) of individuals represented were adult couples, with a further 18%, adult groups. Solo adults accounted for 14% of visitors to Alcester and 11% had travelled with children in their group.

- Over eight out of ten (83%) visitors to Alcester aged over 45. In the 45-54 age group, there were almost double the number of females to males 11:6. Across all other age groups, the ratio of male to female was very similar.

- Almost three quarters (74%) of all visitors to Alcester fell into the affluent ‘ABC1’ socio-economic group, whilst a quarter (24%) were classified in the C2 category. Only 8% of visitors were in the DE category.

- Visitors to Alcester came from a very wide range of locations across the country. Overall, the neighbouring county of Worcestershire supplied almost a third (31%) of all visitors to Alcester, followed by a fifth (21%) from the West Midlands

- 66% of respondents were in Alcester on a leisure trip/holiday, with a further 21% on a special shopping trip.

- On average, day visitors spent 2 hours and 17 minutes in Alcester; longer than both 2012, where day visitors spent on average 2 hours and 2 minutes, and 2007 (2 hours 7 minutes).

- Of all visitors staying overnight, the average number of nights spent in Alcester was 3.0 much lower than in 2012 where the average number of nights was 3.7 and 3.4 in 2007.

- 88% of visitors to Alcester arrived by car, with staying visitors using more public transport than all types of day visitors.

- Over a quarter (28%) of respondents were new visitors to Alcester, higher than in 2012 but on a par with new visitors in 2007.

- Almost half (44%) of visitors to Alcester have visited the town more than 5 times in the last 12 months.

- 71% of overnight visitors were staying in some form of commercial accommodation whilst on an overnight stay in Alcester.

- 31% of visitors indicated that shopping/looking around the shops was the primary motive for respondents to visit Alcester. Other activities undertaken in the town included stopping for lunch and for tea/coffee.

- Almost a quarter (23%) of respondents had visited an event in Alcester in the last 12 months which included the Christmas/French markets, Christmas Lights and 1st World War Exhibition at the Museum.

- Almost three fifths (57%) of visitors indicated that Alcester did not need any additional facilities or services. Other responses included: more choice of shops/longer opening hours; keep it as it is, toilet facilities and better/more stalls at the market.

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1.0 INTRODUCTION, BRIEF & METHODOLOGY

1.1 Introduction

The survey took place during the peak visitor period from the middle of July 2017 until the end of September 2017. Where possible, comparisons with the previous surveys undertaken in 2007 and 2012 are included.

The survey took place in order to:-

- Provide basic data on the profile, origin, behaviour, use of facilities and opinions of visitors to Alcester to help improve understanding of tourism within the town.
- Ensure that marketing campaigns are properly focused and allow their effectiveness to be monitored.
- Identify the main reasons why visitors come to Alcester

The findings of the visitor survey research which took place in Alcester are detailed in this report.

1.2 Objectives of the Survey

A core output of this survey is the gathering of benchmarking data to measure visitor profile characteristics and visitor satisfaction on a range of indicators that comprise 'the visitor experience'. These include the cleanliness of streets and public toilets, provision and cost of car parking, quality of local restaurants and the friendliness of local people. Indicator scores for similar types of destination across the country are then compared to measure relative performance and identify best practice.

The overall benefit of benchmarking is that it provides a customer-focused basis on which to set priorities for action and improve the destination 'product'. Uses include:

- Identifying strengths and weaknesses, since under-performance against key competitors can be a powerful influence on decision-makers

- Securing additional resources for visitor management projects, often by identifying needs which can be met by funding from the budgets of other Council departments

- Raising the profile of the visitor management function within the Town and helping to secure political support for improvements to the town

- Influencing product suppliers and the private sector to improve, acting as a driver for Town initiatives aimed at improving standards

- Generating positive PR from benchmarking findings, playing a positive role in building civic pride

- Helping to identify best practice amongst a range of destinations which can be shared

- Demonstrating achievement through year on year improvements against baseline data to measure the impact of capital expenditure on physical products and campaigns

1.3 Survey Methodology

In order to meet the objectives, a face to face questionnaire survey was carried out by a team of professional Market Research interviewers. The Alcester Market Town Benchmarking Survey was carried out between July and September 2017 covering some 17 days, with interviewing taking place both at weekends and weekdays. A total of 216 interviews with visitors to Alcester were carried out during the survey period.

Interviewing was undertaken at four locations within the town in order to gain a cross section of visitors to Alcester as indicated in table 1.1.

Table 1.1: Interview Locations		**(216)**
High Street	84%	182
St Nicholas Church	13%	27
War Memorial/Town Hall	2%	4
Alcester Heritage Centre	1%	3

N.B. Totals may add up to more or less than 100% due to rounding

In order to ensure this consistency with the definition of a ‘visitor’, a filtering process in all benchmarking surveys is used to exclude certain types of people from the survey namely:

- Residents of Alcester within a five-mile radius of the town centre (to help the interview process, all interviewees were shown a map of Alcester and the five-mile radius)
- Non-residents on day visits to Alcester for non-leisure purposes – e.g. trips concerned with their normal work, study or household shopping.
- ‘Other’ visitor types

Because satisfaction surveys rely on visitors having used or experienced a particular service or facility, interviewing was not conducted before 10.30am, and only those who were at least half way through their visit were interviewed.

The survey was conducted on a simple random basis and interviewers asked the ‘next person to pass’ if they would participate. If the interviewee was a resident of Alcester, the interview was terminated after question one. Questions were designed to take into account the fact that visitors could be at the middle or end of their current trip and therefore respondents were asked questions which involved making predictions for future actions, i.e. spending later on the trip, using facilities or services later on etc.

It is acknowledged that face to face surveys are liable to under-count certain sections of the visitor market, for instance those on a coach tour, on business visitors and visitors from overseas. In the case of overseas visitors, under counting may occur where a problem arises in translation, in the interpretation of questions and in some cases a reluctance to become involved with what appear to be officials/government.

1.4 Market Days

Interviews were conducted on both market and non-market days. In Alcester, 68% of interviews were conducted on a non-market day and 32% on a market day.

1.5 Statistical Reliability

All sample surveys are subject to statistical error that varies with the sample size and the order of magnitude of the research findings being considered. This survey obtained a sample of 210 and the margins within which one can be 95% certain that the true figures in this report will lie are presented below.

Table 1.2: Statistical Error	
Findings from survey	**95% confidence interval**
50%	+/- 6.9%
40/60%	+/- 6.8%
30/70%	+/- 6.4%
20/80%	+/- 5.5%
10/90%	+/- 4.2%

This means, for example, we can be 95% certain that if 20% of the sample is found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies in the range of +/- 5.5%, i.e. between 14.5% and 25.5%.

1.6 Presentation of results

This report makes distinctions between the visitor profiling questions and more detailed benchmarking analysis. Profiling questions, such as origin, transport, etc. are dealt with relatively briefly, whilst more analysis is put into the benchmark results of indicator ratings. The results shown are generally presented for all visitors. However, given the sample sizes for both day and overnight visitors' analysis of the two visitor markets are shown throughout the report.

Each factor for which an opinion is sought, is rated on a scale of one to five, where 1= 'very poor' (or the most negative response), 2= 'poor', 3= 'average', 4='good' and 5= 'very good' (or the most positive response). This allows an opinion score out of a maximum of five to be calculated.

Mean scores are also compared against 'all market towns' average results which represent the combined results from all the market towns participating in the benchmarking surveys in 2007.

As a general guide, when using a five-point scale (i.e. for samples of 100-1000), there must be a difference of at least 0.2 between two mean scores for this to be significant.

1.7 Definitions

For the purposes of this report, visitors to Alcester are divided into three main types:

- *'Day visitors from home'* - visitors who had travelled from, and were returning to, homes outside the Alcester area on the day of their visit.
- *Day visitors on holiday* – visitors who are away from home staying in another destination and travelling to Alcester for the day.
- *'Staying visitors'* - visitors staying overnight for at least one night in accommodation within Alcester. This includes those staying with friends or relatives, as well as those staying in commercial serviced or non-serviced accommodation.

1.8 Notes to the reader

- All percentages are rounded to the nearest whole figure so on occasions figures may not exactly equal 100%
- A “0” indicates a value of less than 0.5%
- A dash (-) indicates no value

2.0 VISITOR PROFILE

2.1 Visitor Type

Of the 216 visitors interviewed, two thirds (66%) were day visitors from home, on a par with the previous survey in 2012. Day visitors from a holiday base outside of Alcester accounted for 17% of visitors, lower than in 2012 (23%). Encouragingly, there has been an increase in the number of staying visitors since 2012. A sixth (17%) of all visitors were staying overnight in commercial or non-commercial accommodation within Alcester, up from both 2007 and 2012 (11% and 12% respectively).

Only 4% (9 interviewees) of visitors to Alcester were from overseas and therefore no analysis for this market will be shown.

Figure 2.1: Type of Visitor

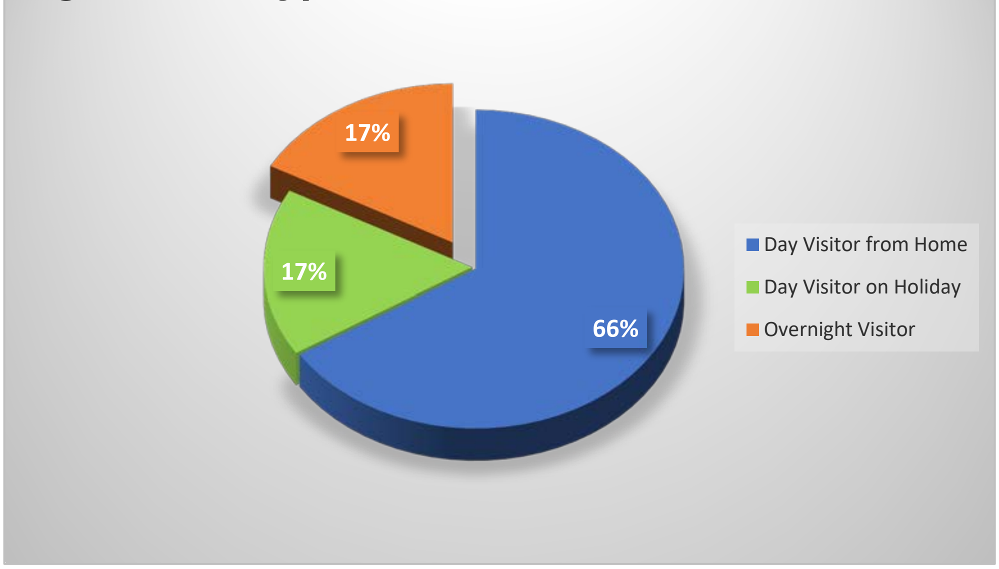


Table 2.1: Type of Visitor			(216)
	2007	2012	2017
Day visitor from home	71%	65%	66%
Day visitor on holiday	18%	23%	17%
Staying visitor	11%	12%	17%

2.2 Group size and composition

A total of 216 parties of visitors were surveyed. All provided demographic data on their group. The average (mean) number of people per group was approximately 2.2 giving a total of 475 people included in the survey sample.

Overall, over half (57%) of individuals represented were adult couples, with a further 18%, adult groups. Solo adults accounted for 14% of visitors to Alcester and 11% had travelled with children in their group.

Figure 2.2 and table 2.2 indicate the group structure of visitors to Alcester.

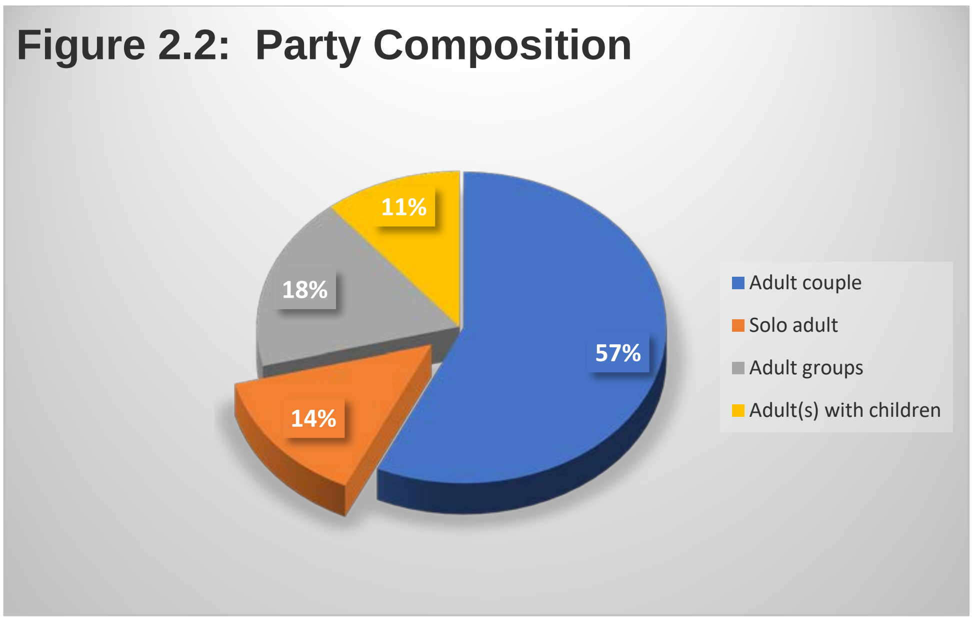


Table 2.2: Party Composition by Types of Visitor			(216)
	Day visitor from home	Day visitor on holiday	Staying Visitor
Adult couple	57%	64%	54%
Solo adult	15%	11%	11%
Adult(s) with children	12%	11%	8%
Adult groups	16%	14%	27%

Day visitors on holiday provided the largest group of adult couples visiting Alcester. Staying visitors provided a higher number of adult groups than both day visitors from home and day visitors on holiday. Day visitors from home had slightly higher levels of adults travelling on their own (15%) and adults accompanied by children (12%), that both other markets.

Table 2.3: Party Composition			**(216)**
	2007	**2012**	**2017**
Adult couple	51%	55%	57%
Solo adult	15%	21%	14%
Adult(s) with children	14%	11%	11%
Adult groups	20%	21%	18%

There has been a steady rise in the number of adult couples visiting Alcester since 2007 when 51% of visitors was made up of adult couples, rising to 55% in 2012 and up 2 percentage points in 2017 to 57%.

There has been little change in the number of visitors travelling with children since 2012 with 11% of visitors travelling with children in both 2012 and 2017.

The reverse has been seen with those visitors travelling on their own, down from 21% in 2012 to 14% in 2017, a fall of 7 percentage points. There has been a fairly consistent level of visitors travelling with adult groups during this period.

2.3 Age Profile

Figure 2.3 indicates that there is a slight bias towards the older age groups, with over eight out of ten (83%) visitors to Alcester aged over 45. In the 45-54 age group, there were almost double the number of females to males 11:6. Across all other age groups, the ratio of male to female was very similar.

Table 2.4: Age Profile – All Visitors			**(216)**
	Male	**Female**	**Total**
0-15 Years	3%	4%	7%
16-24 Years	1%	1%	2%
25-34 Years	1%	2%	3%
35-44 Years	3%	3%	6%
45-54 Years	6%	11%	17%
55-64 Years	13%	14%	27%
65-74 Years	14%	15%	29%
75+ Years	6%	4%	10%
Total	**47%**	**55%**	**101%**

NB: Totals may add up to more or less than 100% due to rounding

Figure 2.3: Age Profile - All Visitors

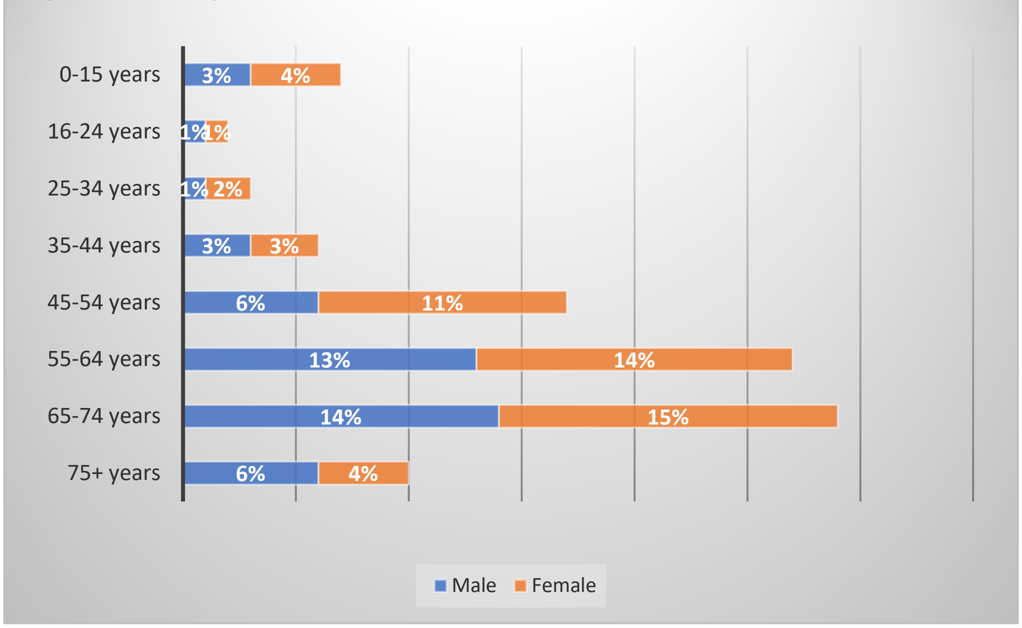


Table 2.5: Age Profile Comparisons

	2007	2012	2017
Base	*456*	*469*	*475*
0-15 Years	8%	8%	7%
16-24 Years	3%	3%	2%
25-34 Years	7%	3%	3%
35-44 Years	10%	7%	6%
45-54 Years	15%	13%	17%
55-64 Years	26%	25%	27%
65-74 Years	22%	40%	29%
75+ Years	9%		10%
Total	**100%**	**99%**	**101%**

NB: figures may total more or less than 100% due to rounding

There has been little change in the age profiles of visitors to Alcester since 2012, with the exception of the 45-54 age group, up from 13% in 2012 to 17% in 2017. In general, there has been no significant change seen during this period.

2.4 Socio-Economic Profile

Based on the occupation of their household's highest income earner, visitors were categorised by socio-economic group, using the following Market Research Society standards.

AB	*Managerial, administrative or professional at senior or intermediate level*
C1	*Supervisory, clerical (i.e. white collar), junior administrative or professional*
C2	*Skilled manual worker*
DE	*Semi-skilled and unskilled manual worker, retired state pensioner, casual earner, unemployed.*

Almost three quarters (74%) of all visitors to Alcester fell into the affluent ‘ABC1’ socio-economic group, whilst a quarter (24%) were classified in the C2 category. Only 8% of visitors were in the DE category.

Table 2.6: Socio Economic Profile				**(216)**
	Total	**Day visitor from home**	**Day visitor on holiday**	**Staying visitor**
AB	44%	43%	56%	35%
C1	30%	29%	25%	38%
C2	18%	18%	19%	16%
DE	8%	9%	-	11%

In many surveys, the highest level of ABC1 visitors are found in the overnight market. However, in Alcester, day visitors on holiday contain higher levels of ABC1’s (81%) compared to both staying visitors and day visitors from home (73% and 72% respectively).

Table 2.7: Age Profile Comparisons			
	2007	**2012**	**2017**
Base	*205*	*206*	*216*
AB	29%	21%	44%
C1	40%	40%	30%
C2	16%	30%	18%
DE	15%	9%	8%

Visitors classified as AB’s have doubled since 2012, up from 21% to 44% in 2017, an increase of 23 percentage points. The reverse is seen within the C1 category, where in both 2007 and 2012, four out of ten visitors classified in this group, compared with only 30% in 2017. Over the past ten years, the levels of DE visitors to Alcester have continued to fall during this period.

3.0 ORIGIN OF VISITORS

3.1 UK / Overseas Visitors

Table 3.1 indicates the origin of day and overnight visitors to Alcester during the survey period.

Table 3.1: Origin of Visitors (216)

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitors
Worcestershire	31%	45%	-	8%
West Midlands	21%	27%	6%	11%
Warwickshire	15%	20%	6%	5%
Lancashire	2%	1%	3%	5%
Staffordshire	2%	2%	-	3%
Oxfordshire	2%	1%	3%	3%
Somerset	2%	-	8%	3%
Northamptonshire	1%	1%	3%	3%
Buckinghamshire	1%	1%	-	5%
Hants/Isle of Wight	1%	-	8%	-
North Wales	1%	-	6%	3%
Cumbria	1%	-	3%	3%
Merseyside	1%	-	-	5%
Gloucestershire	1%	1%	-	3%
Cambridgeshire	1%	-	6%	-
Essex	1%	-	3%	3%
Kent	1%	-	-	5%
Surrey	1%	-	6%	-
Bath/Bristol	1%	1%	-	3%
Canada	1%	-	6%	-
New Zealand	1%	-	3%	3%

*NB: **The West Midlands Metropolitan Area refers to Birmingham, Solihull and the 4 boroughs of the Black Country: - Dudley, Sandwell, Walsall and Wolverhampton*

Visitors to Alcester came from a very wide range of locations across the country. Overall, the neighbouring county of Worcestershire supplied almost a third (31%) of all visitors to Alcester, followed by a fifth (21%) from the West Midlands**. The parent county of Warwickshire contributed the third largest number of visitors (15%).

As with all visitors to Alcester, almost half (45%) of day visitors from home originated from Worcestershire, 27% from the West Midlands and 20% from Warwickshire. Day visitors on holiday were from a wider variety of destinations including Northamptonshire (8%). The West Midlands supplied the most staying visitors (11%). Only 9 respondents were from overseas; 2 from Canada, 2 from New Zealand and 1 each from Greece, Ireland, the USA, Australia and UAE.

4.0 CHARACTERISTICS OF VISIT

4.1 Main purpose of visit to Alcester

Respondents were asked the main purpose of their visit to Alcester on the day they were interviewed.

The main purpose of a visit was for leisure/holiday, noted by 66% of visitors, a lower proportion than in 2012 (70%) but on a par with 2007 (64%). Visiting friends/ relatives accounted for just 13% of visits to Alcester, fall of eight percentage points since 2007.

Table 4.1: Purpose of Visit			(216)
	2007	***2012***	**2017**
Leisure trip/holiday	*64%*	*70%*	66%
Visiting friends or relatives	*21%*	*12%*	13%
Shopping trip (special)	*16%*	*18%*	21%

NB: Columns may not add up to 100% due to rounding

Across all three markets, the main purpose of their trip to Alcester was for leisure/holiday (65%, 78% and 59% respectively). Almost a third (32%) of staying visitors were in Alcester visiting friends / relatives, a significant upturn of 28 percentage points since 2012. Day visitors from home were more likely to visit for a shopping trip (29%) compared to all other markets.

Table 4.2: Purpose of visit by type of visitor									(216)
	Day visitor from home			**Day visitor on holiday**			**Staying visitor**		
	2007	***2012***	**2017**	**2007**	**2012**	**2017**	**2007**	**2012**	**2017**
Leisure trip/holiday	*65%*	*67%*	65%	65%	83%	78%	52%	*60%*	*59%*
Visiting friends or relatives	*15%*	*24%*	6%	27%	8%	22%	48%	*4%*	*32%*
Shopping trip (special)	*20%*	*8%*	29%	8%	8%	-	-	*36%*	*8%*

4.2 Length of Stay

Day Visitors

On average, day visitors spent **2 hours and 17 minutes** in Alcester; longer than both 2012, where day visitors spent on average **2 hours and 2 minutes,** and 2007 **(2 hours 7 minutes)**. The average length of stay in market towns is generally shorter due to the size of the town, however, it is thought that a trip lasting around 3 hours or more will involve some form of spend, i.e. eating and drinking as the longer visitors are in a destination, the option to spend additional money is more likely. On average day visitors from home spent **2 hours 19 minutes** on the day of their visit only slightly longer than day visitors on holiday (**2 hours and 11 minutes)**

Staying Visitors

Of all visitors staying overnight, the average number of nights spent in Alcester was **3.0** much lower than in 2012 where the average number of nights was **3.7** and **3.4** in 2007.

4.3 Main form of Transport used

As with most surveys, in particular those that are undertaken in primarily rural areas, private vehicles (such as cars, vans, motorcycles and motor homes) are the main form of transport used. This is also the case in Alcester with 88% of visitors travelling by this method. This has fallen since 2012 and 2007 (92% and 90% each). The use of public transport to arrive in Alcester has remained fairly static over the ten-year period under review.

Table 4.3: Mode of Transport **(216)**

	Total 2007	*Total 2012*	Total 2017	Day visitor from home	Day visitor on holiday	Staying visitor
Car/Van/Motorhome/ Motorcycle	*90%*	*92%*	88%	92%	92%	68%
Bus / Coach Service	*4%*	*2%*	3%	2%	6%	3%
Walked	*4%*	*4%*	5%	1%	-	22%
Bicycle	*1%*	*1%*	3%	4%	3%	-
Train	-	-	1%	-	-	3%
Other	-	-	-	-	-	-

N.B.Totals may add up to more than 100% as multiple answers may have been given

The use of the car was higher amongst day visitors from home and day visitors on holiday (92% respectively) whilst use of public transport was highest amongst staying visitors (6%) and day visitors on holiday, a further 6%. A fifth (22%) of all staying visitors had walked into Alcester on the day of interview.

4.4 New / Repeat Visitors

Visitors were asked if they had ever been to Alcester before. The presence of first time visitors to Alcester is important in terms of visitor management, presuming their lack of knowledge about the area. However, almost three quarters (72%) of visitors had been to the town before and over a quarter (28%) were making a first visit.

Although it is commonly recognised that the repeat visitor is easier to attract as they will know the town and what it has to offer in terms of places of interest, eating and drinking establishments, It is worth noting that being a repeat visitor does not automatically mean that the knowledge of Alcester and its town is comprehensive and, furthermore, repeat visitors may have pre-conceived ideas and patterns of behaviour that may be difficult to influence through continued marketing and visitor management.

Table 4.4: New / Repeat Visitors						**(216)**
	2007	***2012***	**2017**	**Day visitor from home**	**Day visitor on holiday**	**Staying visitor**
New	*28%*	*26%*	28%	15%	53%	54%
Repeat	*72%*	*74%*	72%	88%	47%	46%

The split of new/repeat visitors to Alcester had remained fairly static since 2007. Over half (53%) of day visitors on holiday were on a first visit to Alcester compared with only 15% of day visitors from home. Over half (54%) of staying visitors were first time visitors to Alcester.

Compared with other market towns, Alcester has a very good balance of new visitors coming into the town but is also attractive to visitors who have been before and come back for a repeat visit. The proportion of visitors from neighbouring counties and from Warwickshire itself will also affect the split of new to repeat visitors with knowledge of the area more prominent than visitors from further afield.

4.5 How many times have you visited Alcester in the last 12 months?

Respondents who had made a previous visit to Alcester were asked how many times they had visited the town in the last 12 months. Over two fifths (44%) of visitors have visited Alcester more than 5 times in the last 12 months, a drop of 9 percentage points from 2012 and slightly less than in 2007 (46%).

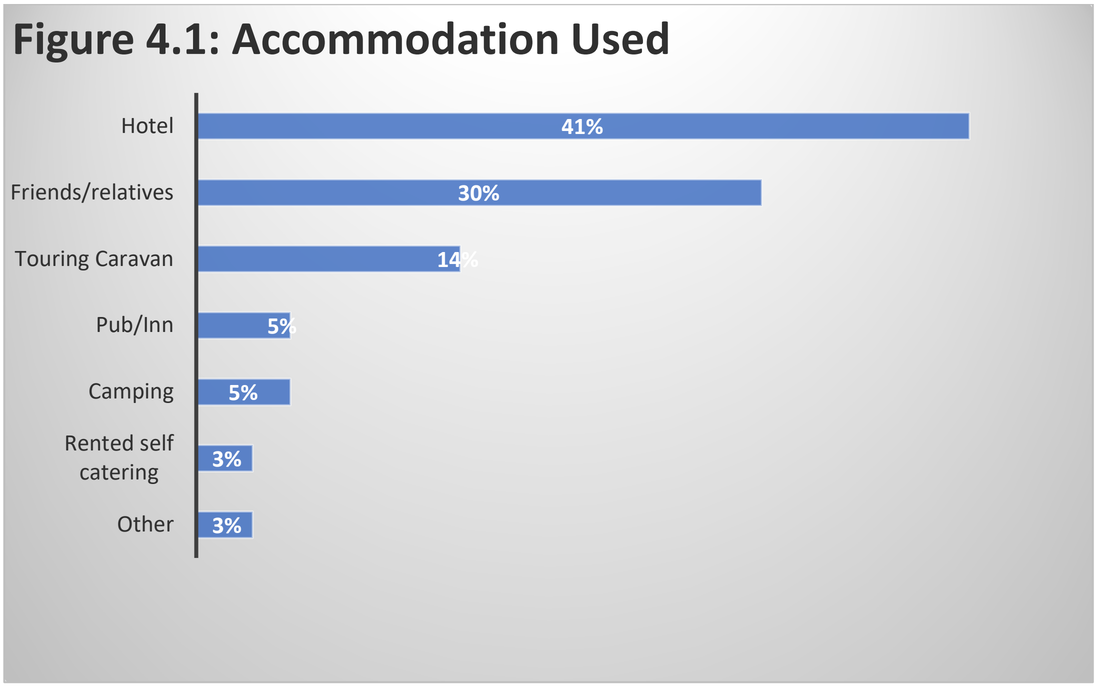
Table 4.5: How many times have you visited during the last 12 months (156)

	2007	2012	2017	Day visitor from home	Day visitor on holiday	Staying visitor
More than 5 times	46%	35%	44%	48%	18%	41%
2-5 times	26%	37%	28%	30%	24%	12%
Once	12%	12%	19%	14%	24%	47%
None	17%	16%	10%	8%	35%	-

Over a third (35%) of day visitors on holiday had not visited Alcester within the last 12 months. However, 24% of day visitors on holiday had visited between 2-5 times, less than day visitors from home (30%) but double that of staying visitors (12%). 47% of staying visitors had visited only once during the past year, higher than both types of day visitors.

4.6 Accommodation Used

37 visitors (17%) indicated they were staying overnight in Alcester. Of these, three out of ten (30%) were staying with friends or relatives on this trip.



In terms of commercial accommodation, 71% of respondents and their group were stopping in some form of serviced or non-serviced accommodation whilst staying in the town. 45% of those stopping overnight were using a hotel or pub/inn compared with 25% stopping in a caravan, cottage or camping.

Table 4.6: Accommodation used			**(37)**
	2007	***2012***	**2017**
Home of friend/relative	*65%*	*56%*	30%
Serviced accommodation	*13%*	*32%*	46%
Non-serviced accommodation	*21%*	*12%*	25%

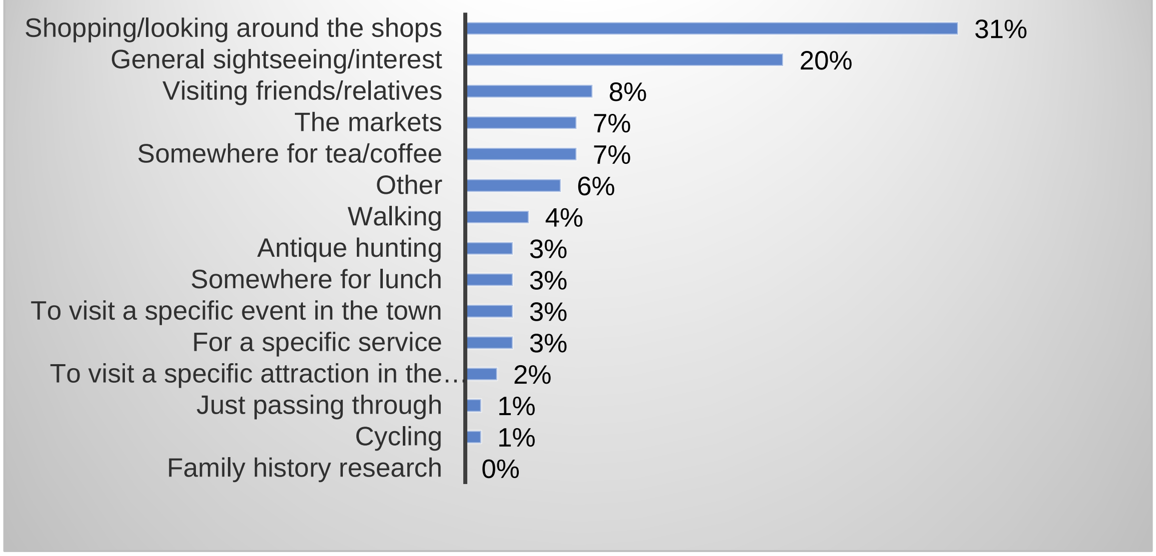
Use of commercial accommodation has increased over the past 10 years with less visitors staying with friends and relatives than in both 2007 and 2012.

4.7 Activities undertaken by visitors whilst in Alcester

Visitors were shown a "show card" listing a range of activities and asked to indicate which had been the **MAIN** activity that they had been involved in whilst in the town. Only one answer was given per party.

Figure 4.2 indicates that shopping/looking around the shops was the **primary** motive for respondents to visit Alcester.

Figure 4.2: Main reason for visiting Alcester



The primary reason for visiting Alcester in both 2017 and 2012 was for shopping/looking around the shops compared with 2007 when general sightseeing was the main reason noted by 32% of respondents. In 2017, there were less visitors who cited visiting friends and relatives as their main reason for visiting (8%) than in 2007 (17%).

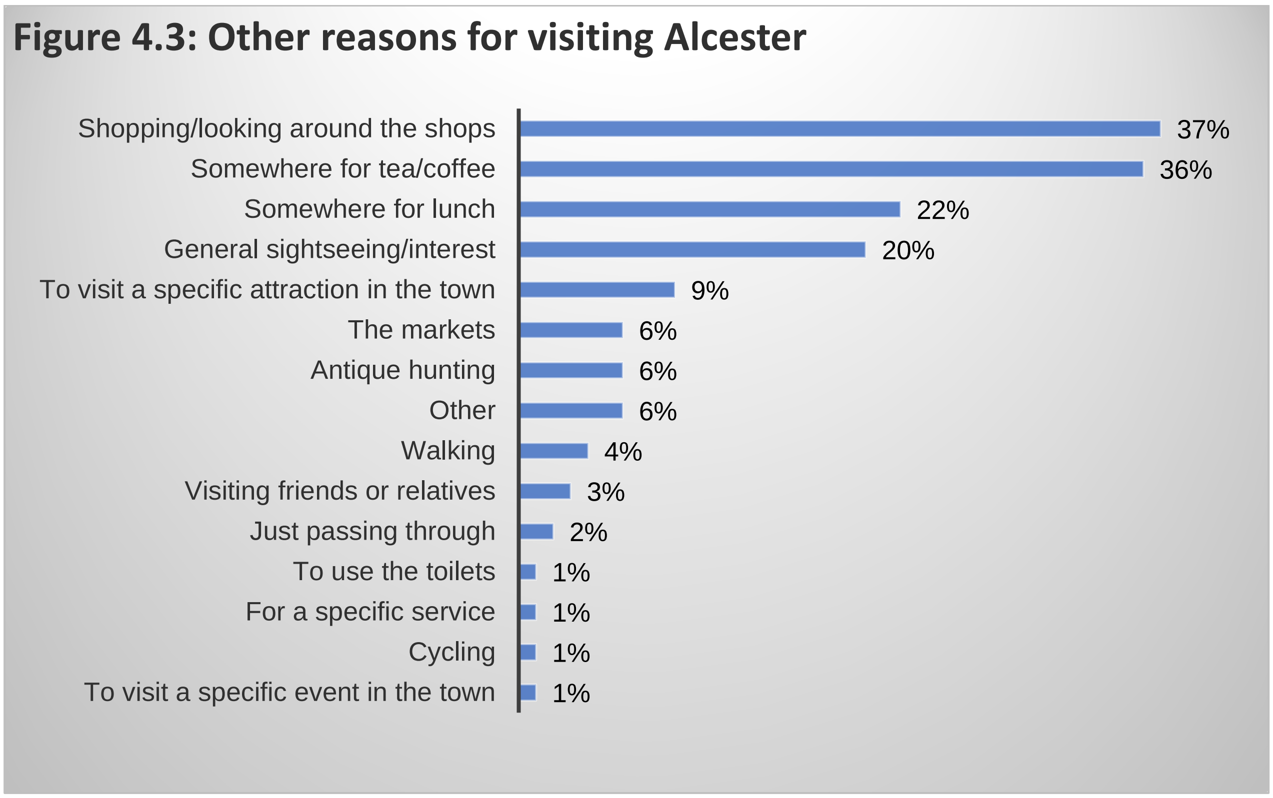
For each of the three market types, the main reason for visiting Alcester was different. Day visitors from home gave shopping/looking around the shops (38%), day visitors from home were on a general sightseeing trip and those staying overnight in the area, visiting friends and relatives was the primary reasons for visiting Alcester (24%). “Other” was mentioned by 6% of visitors and this included; event at Church, National Trust property, to view a house and reunion with friends as well as stopping for breakfast.

Table 4.7: Primary reason for visit by type of visitor						(216)
	2007	**2012**	**2017**	**Day visitor from home**	**Day visitor on holiday**	**Staying visitor**
Shopping/looking around shops	19%	38%	31%	38%	17%	19%
General sightseeing/interest	32%	28%	20%	16%	33%	22%
Visiting friends/relatives	17%	6%	8%	4%	11%	24%
The markets	-	-	7%	6%	8%	8%
Somewhere for tea/coffee	3%	4%	7%	8%	8%	-
Other	7%	6%	6%	4%	3%	16%
Walking	-	2%	4%	6%	3%	-
Antique hunting	-	-	3%	4%	3%	-
Somewhere for lunch	3%	4%	3%	4%	3%	-
To visit a specific event in the town	-	5%	3%	4%	-	5%
For a specific service	5%	1%	3%	3%	6%	-
To visit a specific attraction in town	4%	5%	2%	1%	3%	5%
Just passing through	5%	1%	1%	1%	-	-
Cycling	-	-	1%	1%	-	-
Family history research	-	-	0%	-	3%	-

4.8 Other activities undertaken in Alcester

Visitors were again shown a "show card" listing a range of activities and asked to indicate which other activities that they had been involved in whilst in the town. On this occasion more than one answer could be given – therefore results may add up to more than 100%.

Figure 4.3 indicates that shopping/looking around shops (37%) was the second primary reason for visiting Alcester as was somewhere for tea/coffee (36%), somewhere for lunch (22%) and general sightseeing/interest (20%). Many more reasons were indicated but in smaller numbers.



Since 2007, shopping/looking around shops has been the top secondary reason for visiting the town, although the numbers citing this as their secondary reason has fallen during this period. In 2007, 44% of visitors cited this as the second reason for visiting the town, which fell to 41% in 2012 and again in 2017 to 37%. The attraction of shopping is important to all market towns in terms of the economic benefit it brings. One of Alcester’s strengths is that is has a varied range of shops which are mostly independently owned.

Table 4.8: Secondary reason for visit by type of visitor						(178)
	2007	**2012**	**2017**	**Day visitor from home**	**Day visitor on holiday**	**Staying visitor**
Shopping/looking around shops	44%	41%	37%	34%	34%	53%
Somewhere for coffee/tea	22%	21%	36%	36%	38%	33%
Somewhere for lunch	21%	19%	22%	21%	21%	27%
General sightseeing/interest	25%	29%	20%	15%	28%	30%
Visit specific attraction in town	2%	8%	9%	8%	14%	7%
The markets	2%	2%	6%	6%	3%	7%
Antique hunting	1%	5%	6%	5%	-	13%
Other	6%	5%	6%	5%	3%	10%
Walking	-	4%	4%	5%	-	3%
Visiting friends/relatives	5%	3%	3%	3%	-	10%
Just passing through	4%	5%	2%	2%	7%	-
To use the toilets	4%	5%	1%	1%	-	3%
For a specific service	2%	4%	1%	2%	-	-
Cycling	-	-	1%	2%	-	-
Visit a specific event in town	-	1%	1%	-	-	3%

Along with shopping and looking around the shops (53%), staying visitors also cited somewhere for tea/coffee (33%) and general sightseeing/interest (30%) as a secondary reason for visiting Alcester, followed by somewhere for lunch (27%). The top secondary reason noted by both day visitors from home and those on holiday was stopping for somewhere for a drink (36% and 38% respectively) followed by shopping looking around shops – 34% each. More day visitors on holiday had visited a specific attraction in Alcester than both day visitors from home and staying visitors.

4.9 Visited event in Alcester in past 12 months?

Just over three quarters (77%) of visitors to Alcester had not visited the town for a specific event in the last 12 months.

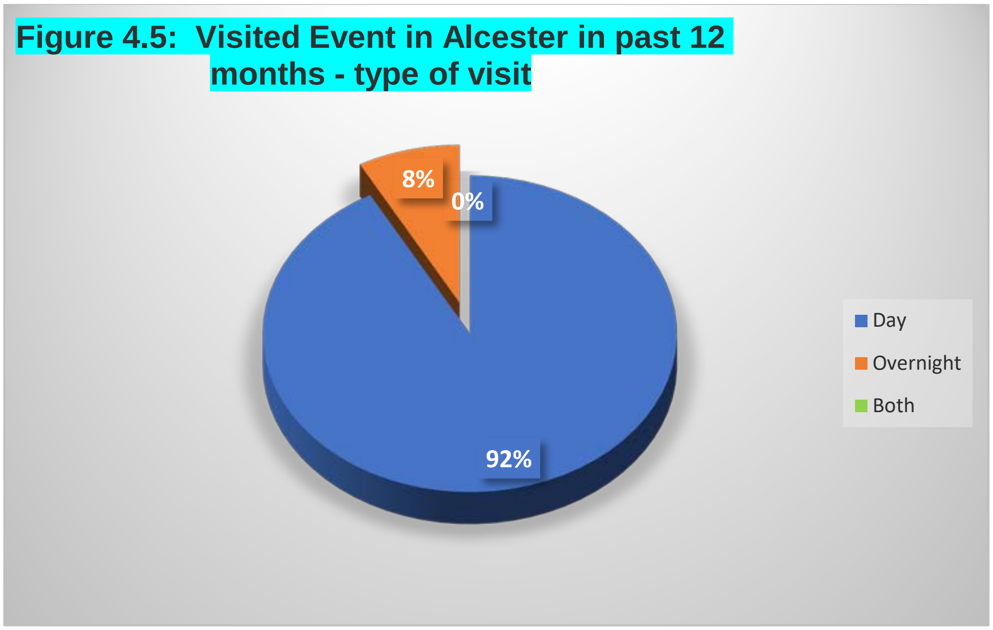
Table: 4.9 Visited an event in past 12 months by type of visitor						(216)
	2007	2012	2017	Day visitor from home	Day visitor on holiday	Staying visitor
Yes	-	15%	23%	29%	6%	16%
No	-	85%	77%	71%	94%	84%

N.B.Totals may add up to more or less than 100% due to rounding

Almost a third (29%) of day visitors from home had visited an event in Alcester over the past 12 months, significantly more that both day visitors on holiday (6%) and staying visitors (16%). The large proportion of day visitors from home who live within a half an hour drive, may contribute to the increased number visiting for an event in the past 12 months.

Those respondents who had visited an event during this period, were then asked to name the event that they had attended. 94% had visited the Christmas/French Market, along with the Christmas Lights and 1st World War exhibition at the museum (6% respectively)

Of the 17% who had visited an event over the past 12 months, the majority (92%) stated this was for a day visit, followed by 8% who had stayed overnight. No one interviewed had visited an event for both types of visit.



Base 50

5.0 EXPENDITURE

5.1 Visitor Expenditure in Alcester

Visitors were asked to estimate how much they and their party were likely to spend during the whole period of their stay in Alcester. This included expenditure incurred on behalf of others, i.e. friends/relatives. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as estimates. It has been found that visitors' own estimates as used in this survey, are usually on the conservative side.

Visitors were asked to give a breakdown of their total expenditure according to the following categories:

- Accommodation
- Eating/drinking out
- Shopping
- Entertainment
- Transport/fuel
- Other

The information on visitor expenditure in the local economy can be used as an indicator of the economic impact of all the visitors. The samples include those who indicated that they had or did not intend to spend anything, but exclude those who gave a "don't know" to the question. Table 5.1 shows the breakdown of all visitor segments' expenditure by sector since 2007.

Table 5.1: Expenditure Breakdown – All Visitors			**(216)**
	2007	**2012**	**2017**
Accommodation	24%	25%	25%
Eating/drinking out	38%	30%	36%
Shopping	35%	42%	36%
Entertainment	-	1%	2%
Transport / Fuel	2%	2%	25
Other	1%	0%	1%

Shopping and eating and drinking makes up a fair proportion of all visitor expenditure from 2007 to 2017 with over a third of spend in 2017 attributed to both shopping and eating and drinking

(36% respectively), although the level of spend on shopping in 2017 has fallen since 2012. Accommodation spend has remained on a par over all three survey years with around a quarter of all spend in Alcester attributed to staying in some form of accommodation.

On average, all visitors (both day and overnight) in Alcester spent £83.23 per party. With an average party size of 2.2 people and an average number of nights of 3, the average expenditure rate per person per night is £27.99.

Table 5.2: Expenditure Breakdown – All Visitors – Per Person Per Party

	2007	2012	2017
All Visitors	£49.21	£92.11	£83.23

5.2 Day Visitors

Shopping accounted for the majority of spend by day visitors in Alcester. Over two thirds (68%) spent money on shopping compared with 61% in 2012 and 65% in 2007. The level of expenditure on eating and drinking out as almost halved since 2012.

Table 5.3: Expenditure Breakdown – Day Visitors			**(177)**
	2007	**2012**	**2017**
Accommodation	-	-	-
Eating/drinking out	31%	35%	19%
Shopping	65%	61%	68%
Entertainment	0%	2%	0%
Transport / Fuel	1%	2%	1%
Other	2%	1%	12%

On average, a party of day visitors from (home and on holiday) in Alcester spent £33.46. With an average day visiting party size of 1.9 people, the average expenditure rate per person is £17.53 during the day. This is higher than both day visitors in 2012 and 2007.

Table 5.4: Expenditure Breakdown – Day Visitors – Per Person			
	2007	**2012**	**2017**
Day visitors – All	£11.18	£11.33	£17.53
Day visitors from home	£11.10	£10.86	£14.70
Day visitors on holiday	£11.36	£12.60	£12.06

5.3 Overnight Visitors

Staying visitors are those people who are on a holiday or short break and staying within the Alcester area. The majority of spend in 2017 was on accommodation, eating and drinking and shopping. Just over half (56%) of spend in 2012 was attributed to using some form of accommodation compared with 42% in 2017. Shopping has continued to rise from 7% in 2007 to 20% in 2017.

Table 5.5: Expenditure Breakdown – Staying Visitors			**(24)**
	2007	**2012**	**2017**
Accommodation	46%	56%	42%
Eating/drinking out	44%	26%	34%
Shopping	7%	15%	20%
Entertainment	0%	1%	3%
Transport / Fuel	2%	2%	2%
Other	0%	0%	0%

An approximate level of spend can be seen amongst the overnight party sample, staying for less than 1 month, based on all visitors using either commercial accommodation or staying with friends and relatives. This equates to an average party size of 2.3 people. A total of £262.37 was spent per party or £112.88 per person per overnight trip. With an average stay of 6 nights, spend per person per night is £17.48.

Table 5.6: Expenditure Breakdown – Staying Visitors – Per Party Per Night			
	2007	**2012**	**2017**
Staying visitors - ALL	£9.01	£11.77	£17.48
Staying visitors – Commercial	£16.46	£10.69	£18.74
Staying Visitors - VFR	£3.96	£3.31	£6.15

6.0 VISITOR OPINIONS

6.1 Introduction

The following section of the report presents the average opinion scores of visitors to Alcester on a range of factors which together comprise the ‘visitor experience’. These are analysed alongside the average rating for both 2007 and 2012’ to give a benchmark comparison. The maximum score achieved in relation to each factor or indicator is also shown for all three years.

6.2 Overview

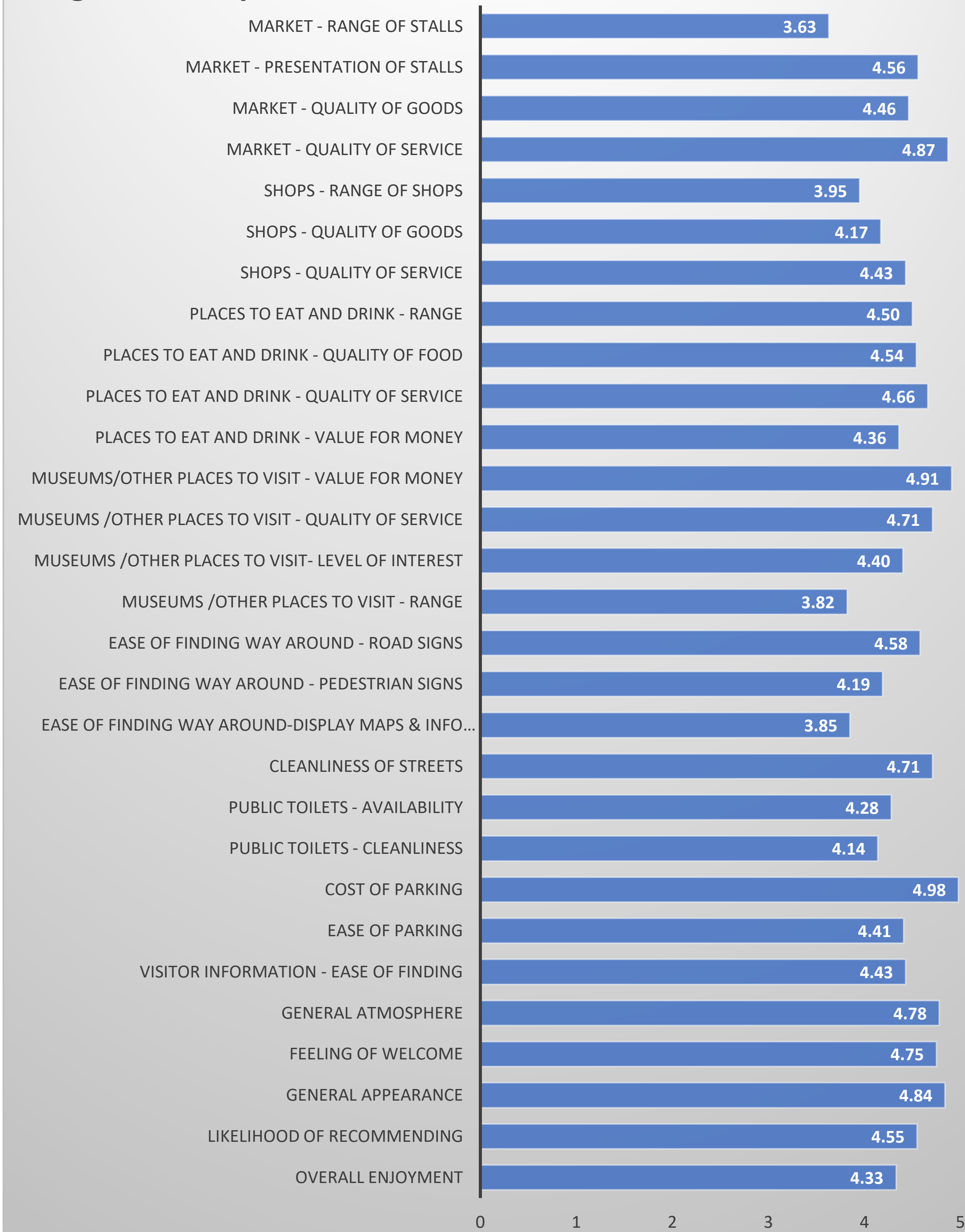
Figure 6.1 shows the average opinion scores for all benchmarked indicators.

The majority of scores are above the ‘average’ of 3.00 on the five-point scale. The highest scoring indicators relate to cost of parking (4.98), value for money at museums (4.91), quality of service at the market (4.87), general appearance (4.84) and general atmosphere (4.78). Overall, the scoring for Alcester was particularly high in most ratings.

The lowest scores received were for the range of stalls at the markets (3.63), range of museums and other places to visit (3.82) and display maps and information boards (3.85).

Table 6.1 details these scores for Alcester alongside ratings for 2012 and 2007. Those scores shown in bold are where ratings in 2017 are higher than the other two years shown.

Figure 6.1: Opinion Scores - Satisfaction



In general, the satisfaction rating for the majority of aspects in Alcester have improved over the last 10 years. Of the 31 rating questions shown in table 6.1 below, only 4 were rated below 4 and 26 had higher scores than both 2007 and 2012, a very positive response from visitors.

Table 6.1: Opinion scores - Satisfaction	**2007**	***2012***	***2017***
Market - range of stalls	3.60	-	**3.63**
Market - presentation of stalls	4.30	-	**4.56**
Market – quality of goods	4.40	-	**4.46**
Market – quality of service	4.30	-	**4.87**
Shops – range	3.79	3.86	**3.95**
Shops – quality of goods	3.98	3.99	**4.17**
Shops – quality of service	4.23	4.27	**4.43**
Places to eat and drink – range	3.90	4.24	**4.50**
Places to eat and drink – quality of food	4.19	4.26	**4.54**
Places to eat and drink – quality of service	4.30	4.41	**4.66**
Places to eat and drink – value for money	4.21	4.22	**4.36**
Museums and other places to visit – range	3.91	3.69	3.82
Museums and other places to visit – level of interest	4.21	3.89	**4.40**
Museums and other places to visit – quality of service	4.27	4.13	**4.71**
Museums and other places to visit – value for money	4.46	4.59	**4.91**
Ease of finding way around – road signs	4.19	4.37	**4.58**
Ease of finding way around – pedestrian signs	4.12	4.35	4.19
Ease of finding way around – display maps and info boards	3.95	4.34	3.85
Cleanliness of streets	4.57	4.51	**4.71**
Public toilets – availability	4.50	4.37	4.28
Public toilets – Cleanliness	4.28	3.98	4.14
Ease of parking	4.35	4.53	4.41
Cost of parking	4.68	4.92	**4.98**
Visitor information – ease of finding	4.15	3.70	**4.43**
Feel safe from traffic	4.13	4.05	**4.60**
Feel safe from crime	4.33	4.57	**4.75**
Overall impression – general atmosphere	4.54	4.62	**4.78**
Overall impression – feeling of welcome	4.50	4.61	**4.75**
Overall impression – general appearance	4.57	4.68	**4.84**
Likelihood of recommending	4.21	4.51	**4.55**
Overall enjoyment	4.01	4.01	**4.33**

6.3 Markets

Visitors who used the market in Alcester were asked to comment on the range of stalls, presentation of stalls, quality of goods on sale and quality of service from stallholders. Due to the low sample in 2012, no figures are available for this survey year.

Figure 6.1: Opinions on the market

The range of market stalls was the lowest rating given for aspects of the market rated at 3.63, with 54% of visitors rating this as satisfied (22%) or very satisfied (32%). A third of all visitors rated the range of markets as neither satisfied or dissatisfied (32%).

Presentation of market stalls received very good satisfaction ratings with an average mean score of 4.56, with the majority of visitors (92%) rating their satisfaction levels as satisfied (29%) or more encouragingly, very satisfied (63%). Only 7% rated this aspect of the market as average.

The quality of goods on sale received an average mean score of 4.46. Nine out of ten (90%) of visitors rating their satisfaction (34%) or very satisfied (56%).

Quality of service from the stall holders was the highest rated aspect of the market at 4.87, with 98% of visitors considering their satisfaction levels as satisfied (8%) and 90% very satisfied. Generally, all scores for 2017 were above the ratings in 2007 for satisfaction with the markets and what they have to offer.

Table 6.2: Range of market stalls	2007	2012	2017
Very satisfied	20%	-	32%
Satisfied	40%	-	22%
Neither satisfied nor dissatisfied	20%	-	32%
Dissatisfied	20%	-	7%
Very dissatisfied	-	-	7%

Table 6.3: Presentation of market stalls	2007	2012	2017
Very satisfied	40%	-	63%
Satisfied	50%	-	29%
Neither satisfied nor dissatisfied	10%	-	7%
Dissatisfied	-	-	-
Very dissatisfied	-	-	-

Table 6.4: Quality of goods on market stalls	2007	2012	2017
Very satisfied	50%	-	56%
Satisfied	40%	-	34%
Neither satisfied nor dissatisfied	10%	-	10%
Dissatisfied	-	-	-
Very dissatisfied	-	-	-

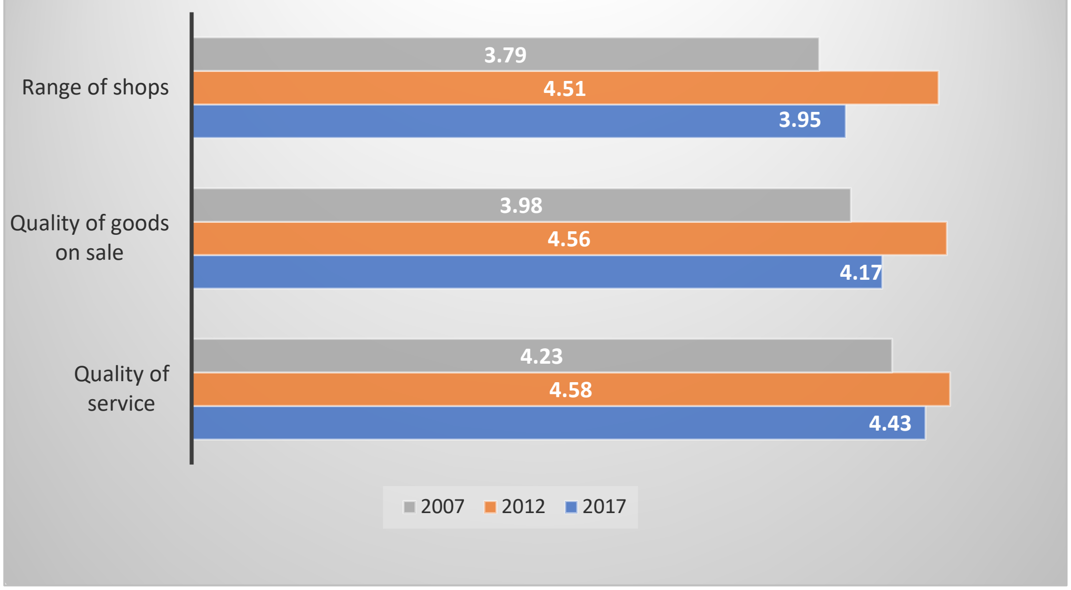
Table 6.5: Quality of service on market stalls	2007	2012	2017
Very satisfied	40%	-	90%
Satisfied	50%	-	8%
Neither satisfied nor dissatisfied	10%	-	3%
Dissatisfied	-	-	-
Very dissatisfied	-	-	-

Base 41

6.4 Shops

Visitors were asked to rate three aspects of the shopping experience in Alcester: range of shops, quality of the shopping environment and quality of service.

Figure 6.2: Opinions on the shops



In 2017, the range of shops in Alcester received the lowest rating in the shopping category (3.95). 74% of visitors rated this aspect as satisfied (49%) or very satisfied (25%). Almost a quarter (22%) of visitors rated this aspect as neither satisfied or dissatisfied. However, the ratings for the range of shops in Alcester has fallen since 2012 but has seen a small improvement on the average mean score in 2007.

The quality of the goods on sale was rated at 4.17, with 86% rating the satisfaction as satisfied (34%) or very satisfied (52%), with this rating lower than in 2012 (4.56) but higher than the average mean score given in 2007 (3.98).

Quality of service received the highest rating in this category in 2017 at 4.43, although it was not as high as 2012 when the mean score was 4.58. However, 93% of visitors rated this as satisfied (44%) or very satisfied (49%). There were no dissatisfied or very dissatisfied scores attributed to the quality of service received in the shops in Alcester.

Generally, the scoring for the shopping experience in Alcester has seen a small fall in satisfaction levels since 2012, but are still higher than in 2007.

Table 6.6: Range of shops	2007	2012	2017
Very satisfied	22%	27%	25%
Satisfied	42%	38%	49%
Neither satisfied nor dissatisfied	30%	30%	22%
Dissatisfied	5%	5%	4%
Very dissatisfied	1%	1%	-

Table 6.7: Quality of goods in shops	2007	2012	2017
Very satisfied	28%	31%	34%
Satisfied	44%	41%	52%
Neither satisfied nor dissatisfied	26%	24%	13%
Dissatisfied	2%	3%	2%
Very dissatisfied	-	1%	-

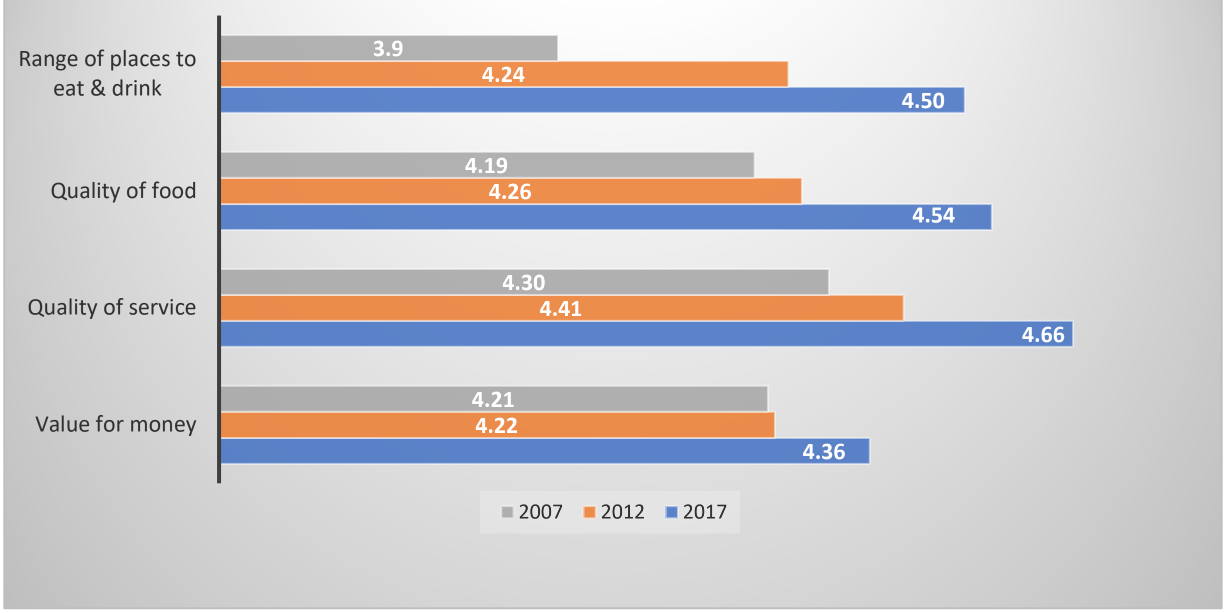
Table 6.8: Quality of service in shops	2007	2012	2017
Very satisfied	43%	46%	49%
Satisfied	39%	36%	44%
Neither satisfied nor dissatisfied	16%	17%	7%
Dissatisfied	2%	1%	-
Very dissatisfied	-	-	-

Base: range 150-168

6.5 Places to eat and drink

Visitors were asked to rate three aspects of the eating and drinking facilities in Alcester: range of places to eat or drink, quality of service and value for money.

Figure 6.3: Opinions on places to eat and drink



Across all aspects of places to eat and drink, high levels of scoring was achieved.

Range of places to eat and drink was the second lowest rated aspect of food and drink establishments but still scored 4.50, considerably higher than 2007 (3.90) and slightly above 2012 (4.24). 95% visitors rated this as satisfied (39%) or very satisfied (56%).

The quality of food at establishments in Alcester received an average mean score of 4.54, an increase on both 2007, (4.19) and 2012 (4.26). 95% of visitors rated this as satisfied (36%) or very satisfied (59%).

Quality of service received the highest rating in this section (4.66). All visitors rated their satisfaction (32%) or very satisfied (68%). As with other ratings in this category, positive scores have continued to rise since 2007.

Encouragingly, value for money was rated at 4.36, slightly above 2007 and 2012. 91% of visitors rated this aspect as satisfied (46%) or very satisfied (45%). A further 8% rated this as average.

Table 6.9: Range of places to eat & drink	2007	2012	2017
Very satisfied	36%	44%	56%
Satisfied	29%	39%	39%
Neither satisfied nor dissatisfied	27%	14%	5%
Dissatisfied	6%	2%	1%
Very dissatisfied	2%	1%	-

Table 6.10: Quality of food in places to eat & drink	2007	2012	2017
Very satisfied	42%	45%	59%
Satisfied	37%	38%	36%
Neither satisfied nor dissatisfied	18%	16%	4%
Dissatisfied	3%	-	1%
Very dissatisfied	-	1%	-

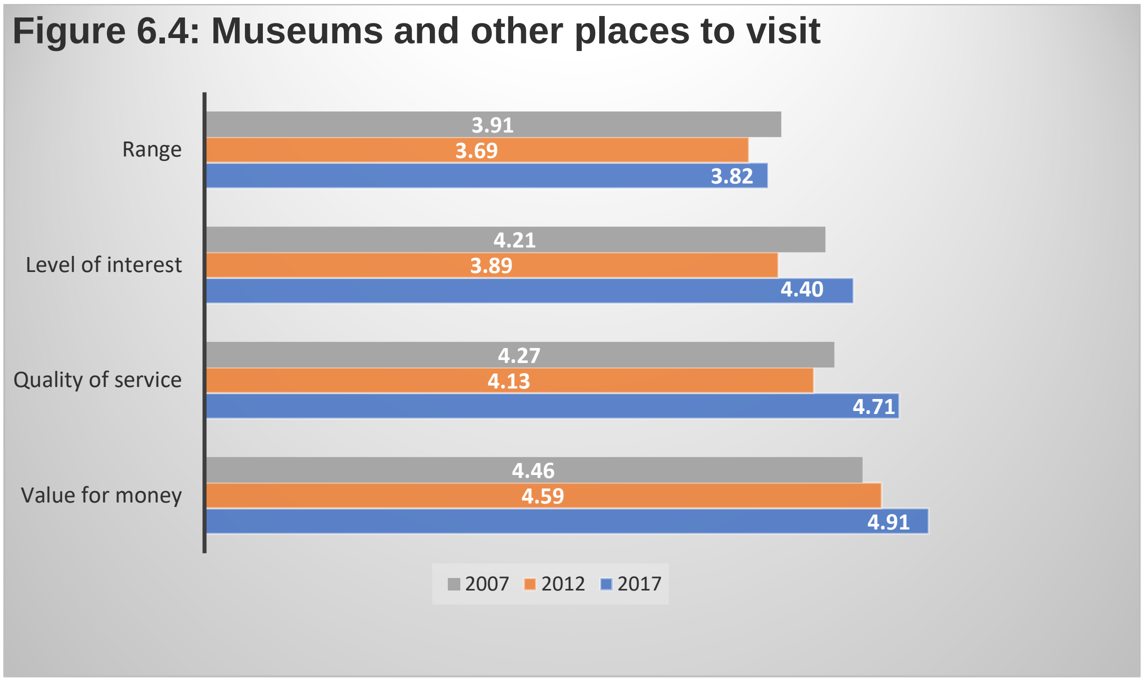
Table 6.11: Quality of service in places to eat & drink	2007	2012	2017
Very satisfied	46%	54%	68%
Satisfied	38%	34%	32%
Neither satisfied nor dissatisfied	16%	13%	-
Dissatisfied	-	-	1%
Very dissatisfied	-	-	-

Table 6.12: Value for money in places to eat & drink	2007	2012	2017
Very satisfied	44%	44%	45%
Satisfied	34%	38%	46%
Neither satisfied nor dissatisfied	21%	15%	8%
Dissatisfied	1%	2%	1%
Very dissatisfied	-	1%	-

Base: 128-147

6.6 Museums and other places to visit

Visitors were asked to rate four aspects of museums and other places to visit in Alcester: Only a small number of visitors gave their comments on this aspect, so these results should be seen as indicative rather than statistically robust.



The range of museums and attractions received a mean score of 3.82, slightly higher than in 2012 (3.69) and marginally lower than in 2007 (3.91). Over half (53%) of respondents who had visited a museum or attraction felt satisfied or very satisfied with the range on offer.

In terms of the level of interest at museums and attractions, a mean score of 4.40 was achieved, with interest in the museum higher than both 2012 and 2007. 86% of respondents rated their satisfaction levels as satisfied (33%) or very satisfied (53%).

The quality of service at the museums and attractions also received a very positive score (4.71). As with level of interest, much higher than 2012. 100% rated this as satisfied (29%) or very satisfied (71%).

Value for money was rated the highest aspect with a mean score of 4.91, up from 4.59 in 2012. 91% of all visitors to the museum were very satisfied with the value the museum represented. No one gave any negative aspects for value for money.

Table 6.13: Range of Museums and other places to visit	2007	2012	2017
Very satisfied	35%	35%	41%
Satisfied	33%	19%	12%
Neither satisfied nor dissatisfied	22%	32%	35%
Dissatisfied	6%	8%	12%
Very dissatisfied	4%	5%	-

Table 6.14: Level of interest at Museums and other places to visit	2007	2012	2017
Very satisfied	40%	44%	53%
Satisfied	46%	15%	33%
Neither satisfied nor dissatisfied	10%	32%	13%
Dissatisfied	2%	6%	-
Very dissatisfied	2%	3%	-

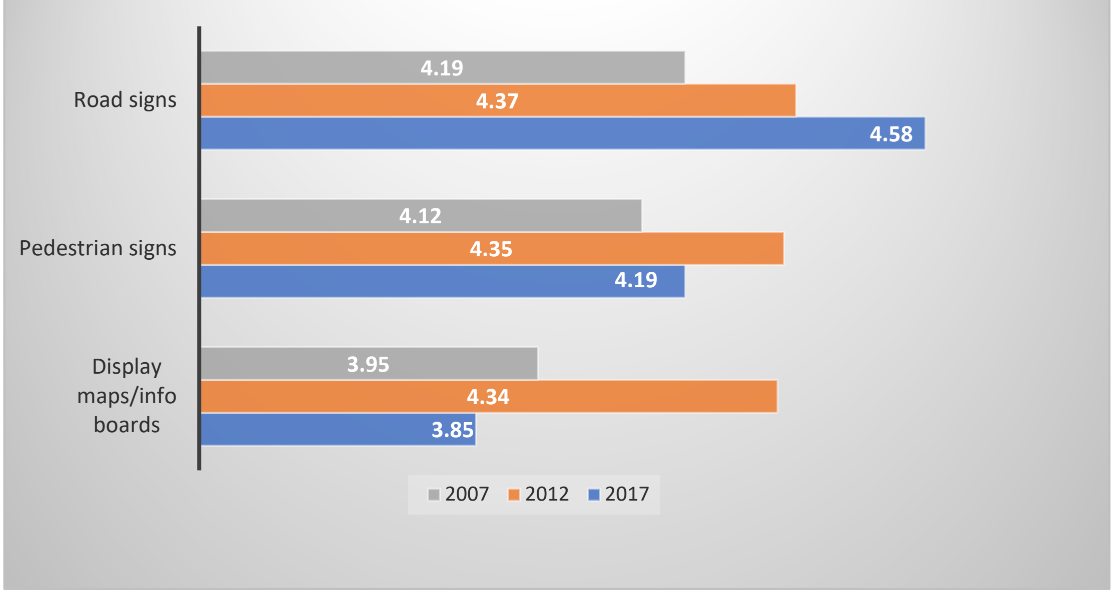
Table 6.15: Quality of service at Museums and other places to visit	2007	2012	2017
Very satisfied	51%	50%	71%
Satisfied	30%	23%	29%
Neither satisfied nor dissatisfied	16%	23%	-
Dissatisfied	-	-	-
Very dissatisfied	3%	3%	-

Table 6.16: Value for money at Museums and other places to visit	2007	2012	2017
Very satisfied	54%	79%	91%
Satisfied	38%	7%	9%
Neither satisfied nor dissatisfied	8%	11%	-
Dissatisfied	-	-	-
Very dissatisfied	-	4%	-

6.7 Ease of finding way around

Visitors were asked to rate three aspects of finding their way around Alcester: road signs, pedestrian signs and display maps and information boards. Given that a high proportion of visitors arrive in Alcester by private vehicle, quality of road signs is likely to be a very important aspect of their visit.

Figure 6.5: Ease of finding way around



In 2017, road signs in Alcester were rated at 4.58, higher than both 2012 and 2007. Over 9 out of 10 (95%) of visitors rated the road signs as to whether they were satisfied (32%) or very satisfied (63%).

Pedestrian signs were rated slightly lower at 4.19, with just over three quarters (77%) rating their satisfaction as satisfied (33%) or very satisfied (44%).

Display maps and information boards in the town was the lowest rated aspect of ease of finding way around rated at 3.85 and lower than both 2012 (4.34) and 2007 (3.95). 64% of visitors rated the levels of satisfaction as satisfied (27%) or very satisfied (37%). A further 23% of visitors rated display maps and information boards as average and 12% were dissatisfied or very dissatisfied.

With the exception of road signs, the overall satisfaction levels for pedestrian signage and display maps /info boards has fallen in 2017.

Table 6.17: Ease of finding way around – road signs	2007	2012	2017
Very satisfied	44%	59%	63%
Satisfied	38%	25%	32%
Neither satisfied nor dissatisfied	11%	10%	5%
Dissatisfied	5%	3%	-
Very dissatisfied	2%	2%	-

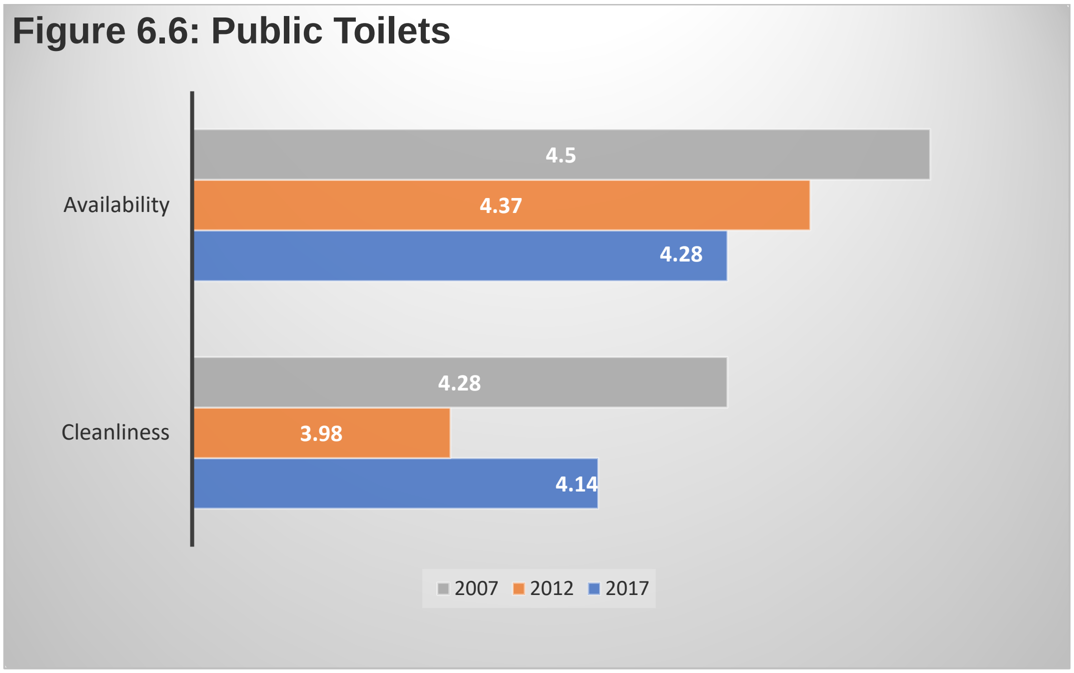
Table 6.18: Ease of finding way around – pedestrian signs	2007	2012	2017
Very satisfied	40%	56%	44%
Satisfied	38%	29%	33%
Neither satisfied nor dissatisfied	18%	9%	21%
Dissatisfied	2%	4%	2%
Very dissatisfied	2%	1%	-

Table 6.19: Ease of finding way around – display maps	2007	2012	2017
Very satisfied	33%	56%	37%
Satisfied	35%	27%	27%
Neither satisfied nor dissatisfied	27%	14%	23%
Dissatisfied	3%	2%	7%
Very dissatisfied	2%	2%	5%

Base: 149-173

6.8 Public Toilets

Visitors were asked to give opinions on both the availability and cleanliness of public toilets in the town. Both were rated considerably higher than both mean scores in 2007 and 2012.



All respondents who had used the public toilets on their visit gave positive ratings with 23% satisfied and 53% very satisfied with the availability of toilets in Alcester. Although the average mean score for availability has fallen over the period under review form 4.28 in 2017, compared to 4.50 in 2007 and 4.37 in 2012.

The cleanliness of public toilets was rated at 4.14. 76% of visitors rated the cleanliness of public toilets as good (27%) or very good (49%), higher than 2012 and lower than the mean score for 2007.

Table 6.20: Visitor opinions on availability of public toilets	2007	2012	2017
Very satisfied	59%	54%	53%
Satisfied	31%	33%	23%
Neither satisfied nor dissatisfied	9%	9%	21%
Dissatisfied	-	4%	2%
Very dissatisfied	-	-	-

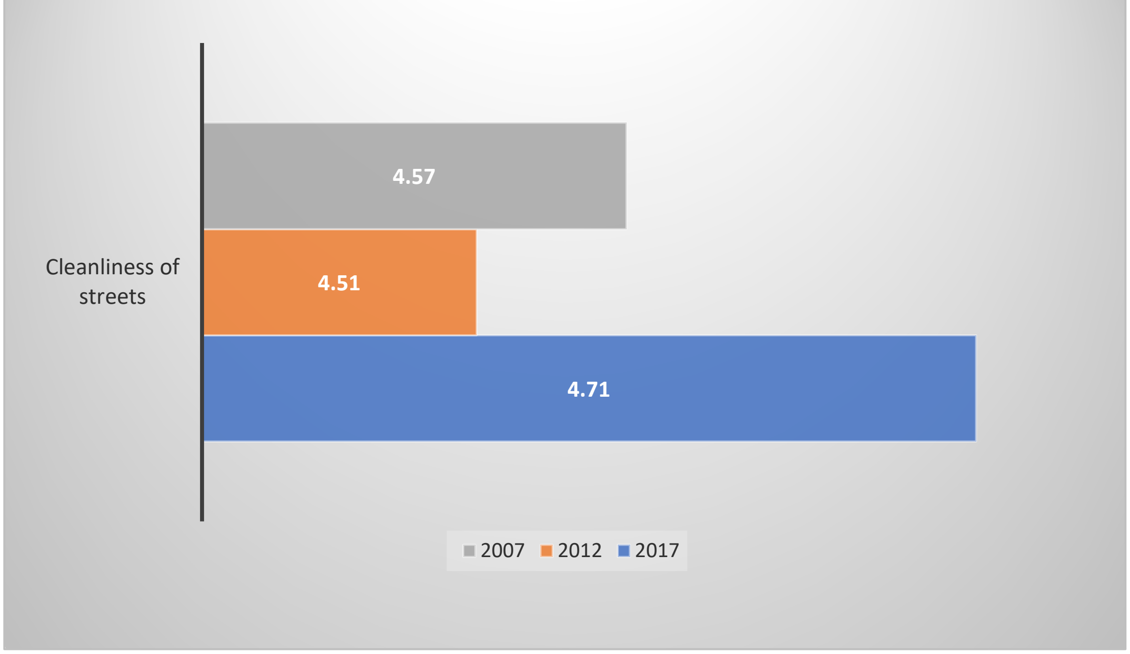
Table 6.21: Visitor opinions on cleanliness of public toilets	2007	2012	2017
Very satisfied	62%	43%	49%
Satisfied	17%	30%	27%
Neither satisfied nor dissatisfied	14%	13%	16%
Dissatisfied	-	13%	5%
Very dissatisfied	7%	3%	3%

Base: 30

6.9 Cleanliness of streets

Visitors were asked for opinions on whether they thought the streets of Alcester were clean whilst on their visit.

Figure 6.7: Cleanliness of streets



The cleanliness of streets rating of 4.71 is higher than the mean score of both 2012 and 2007. Satisfaction levels received positive ratings in 2017 with 72% of visitors very satisfied at the cleanliness of streets in the town.

Table 6.22: Visitor opinions on cleanliness of streets	***2007***	***2012***	***2017***
Very satisfied	62%	64%	72%
Satisfied	33%	30%	27%
Neither satisfied nor dissatisfied	5%	4%	1%
Dissatisfied	1%	-	-
Very dissatisfied	-	3%	-

Base: 201

6.10 Car parking

88% of all visitors to Alcester arrived by private vehicle (car, van, motor home or motorcycle) and therefore parking would have been a significant factor of their visit.

Figure 6.8: Car parking

Overall, 91% of visitors to Alcester considered it very easy (53%) or quite easy (38%) to find a parking space in the town. The average score of 4.40 was slightly below that of 2012 and slightly above the average mean score in 2007 (4.35).

The cost of parking in Alcester in 2017 received the highest score (4.98) with 98% stating the cost as very reasonable. However, it should be noted that in the previous two surveys, the samples were fairly low, together with the fact that a lot of parking is free within the town, so the scores for the cost of parking should be seen as indicative rather than statistically robust.

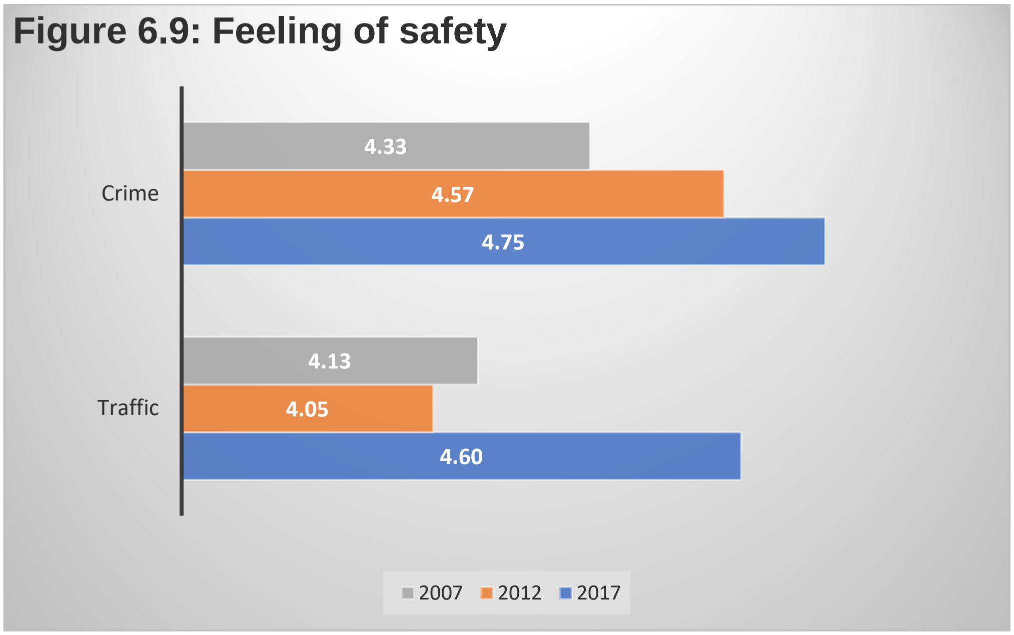
Table 6.23: Visitor opinions on ease of parking	2007	2012	2017
Very easy	58%	53%	53%
Easy	29%	36%	38%
Neither difficult nor easy	4%	4%	5%
Difficult	6%	7%	4%
Very difficult	2%	-	-

Table 6.24: Visitor opinions on cost of parking	2007	2012	2017
Very reasonable	89%	26%	98%
Quite reasonable	-	1%	2%
About average	5%	1%	-
Quite expensive	-	0%	-
Very expensive	5%	0%	-
Not applicable	-	70%	-

Base: 55

6.11 Feeling of safety from crime and traffic

Visitors were asked if they felt safe from both crime and traffic whilst moving around the town.



The majority (99%) of visitors strongly agreed (75%) or agreed (24%) that they felt safe from crime in the town, the highest scores across all 3 years in question.

Feeling of safety from traffic was also rated highly with a mean score of 4.60, higher than 2012 at 4.05 and 2007 at 4.13. 96% of respondents agreed (31%) or strongly agreed (65%) that they felt safe from traffic whilst in the town.

Table 6.25: Visitor opinions on feeling safe from crime	2007	2012	2017
Agree strongly	37%	60%	75%
Agree	59%	37%	24%
Neither disagree or agree	4%	3%	1%
Disagree	-	-	-
Disagree strongly	-	-	-

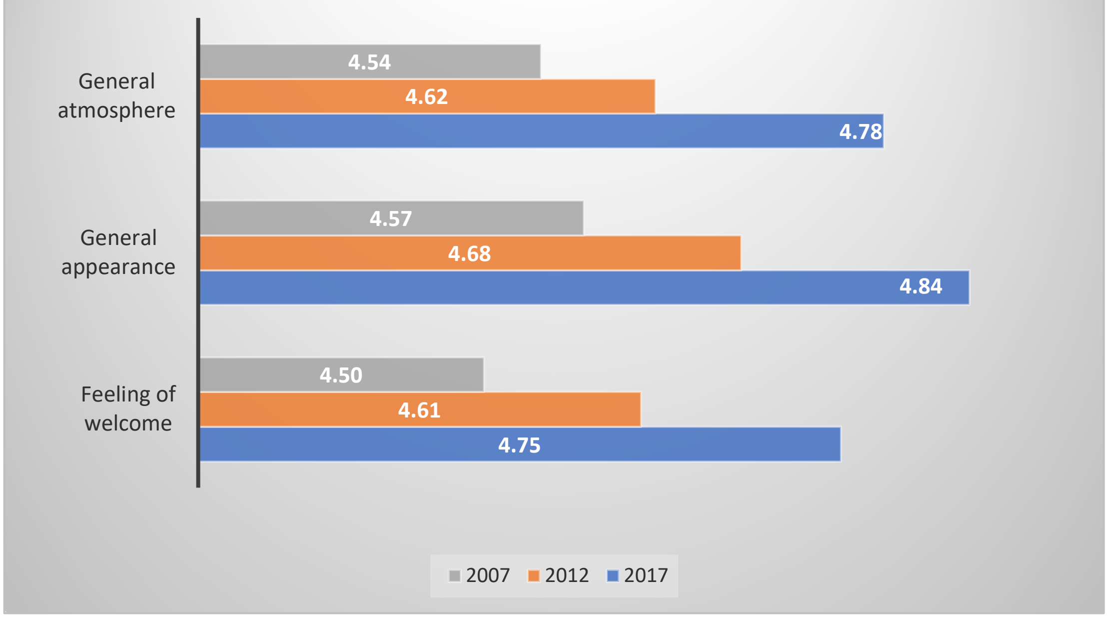
Table 6.26: Visitor opinions on feeling safe from traffic	2007	2012	2017
Agree strongly	28%	31%	65%
Agree	59%	51%	31%
Neither disagree or agree	11%	11%	4%
Disagree	2%	6%	-
Disagree strongly	-	1%	-

Base: 214

6.12 General atmosphere & feeling of welcome

Visitors were asked for opinions on the general atmosphere, feeling of welcome and general appearance in Alcester Town.

Figure 6.10: General atmosphere & feeling of welcome



The general atmosphere in Alcester received the second highest rating at 4.78, an increase on scores in both 2012 and 2007. The majority (98%) of visitors were satisfied or very satisfied with the atmosphere in Alcester.

The general appearance of Alcester was rated at 4.84, the highest of all aspects in this section in 2017 and higher than both previous survey years of 2012 and 2007. 99% of visitors rated their satisfaction as satisfied (14%) and encouragingly, very satisfied (85%).

The feeling of welcome in the town received an average mean score of 4.75 and as with the other two ratings, higher than both 2012 and 2007. In 2017, 99% of visitors rated this as satisfied (19%) or very satisfied (80%).

Table 6.27: Visitor opinions on feeling of welcome	2007	2012	2017
Very satisfied	60%	66%	77%
Satisfied	33%	29%	21%
Neither satisfied nor dissatisfied	6%	5%	2%
Dissatisfied	1%	-	-
Very dissatisfied	-	-	-

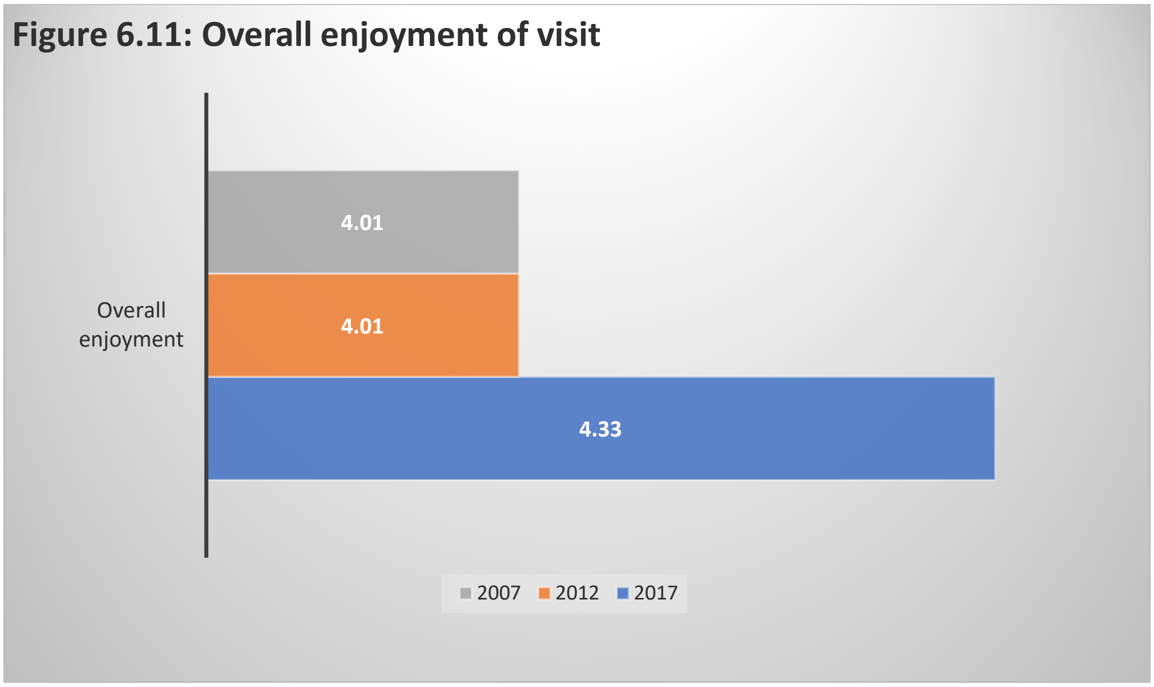
Table 6.28: Visitor opinions on general appearance	2007	2012	2017
Very satisfied	62%	71%	85%
Satisfied	34%	25%	14%
Neither satisfied nor dissatisfied	4%	3%	1%
Dissatisfied	-	-	-
Very dissatisfied	-	-	-

Table 6.29: Visitor opinions on general atmosphere	2007	2012	2017
Very satisfied	59%	64%	80%
Satisfied	36%	33%	19%
Neither satisfied nor dissatisfied	4%	2%	1%
Dissatisfied	-	-	-
Very dissatisfied	-	-	-

Base: 122

6.13 How would you rate the overall enjoyment of your visit

Visitors were asked to rate the overall enjoyment of their visit to Alcester.



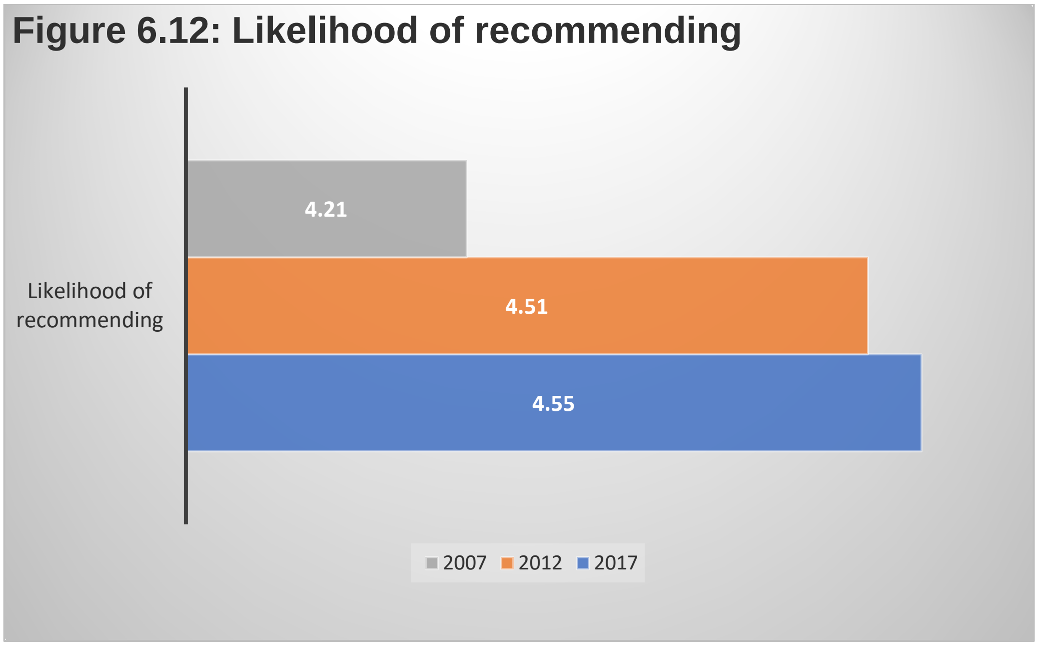
95% of visitors rated the overall enjoyment of their visit as very high (39%) or high (56%), with an average mean score of 4.33. Overall, there has been an increase in the levels of enjoyment since 2007 and 2012, where the mean score for both years on overall enjoyment of visit was 4.01 respectively.

Table 6.30: Visitor opinions on overall enjoyment of visit	*2007*	*2012*	*2017*
Very high	19%	34%	39%
High	62%	53%	56%
Average	18%	13%	6%
Low	-	-	-
Very low	-	-	-

Base: 214

6.14 Likelihood of recommending Alcester

Visitors were asked to rate the likelihood of recommending a visit to Alcester to their friends and family.



97% of visitors were very likely (59%) or likely (38%) to recommend a visit to Alcester. This is slightly higher than 2012 when 95% of visitors would recommend a visit. Overall, the likelihood of recommending Alcester to other people has increased by 9 percentage points since 2007.

Table 6.31: Visitor opinions on likelihood of recommending	2007	2012	2017
Very likely	35%	56%	59%
Likely	53%	39%	38%
Possibly	9%	5%	3%
Unlikely	2%	-	0%
Very unlikely	-	-	-

Base: 216

Only 1 person was unlikely to recommend a visit. The reasons given were; more for the older generation and not enough shops for young people.

6.15 What additional facilities or services would have added to the enjoyment of your visit?

Over half of all visitors to Alcester (57%) did not feel that there were any additional facilities or services that would have added to the enjoyment of their visit. Other responses included the following:

Table 6.32: What additional facilities / services	
Base	176
No/None/Nothing	57%
Better/more shops/longer opening hours	8%
Keep it as it is/lovely	6%
Toilets/more/baby changing facilities	5%
Market/more stalls needed	5%
better signs/maps on display/signs to car park	4%
Parking/better/more/disabled bays/longer stays	2%
New supermarket	2%
Upmarket restaurant/evening eating places/wine bar	2%
Don't know	1%
traffic management/zebra crossing	1%
Benches/seating	1%
Local McDonalds/Burger King with WIFI to attract more youngsters	1%
More publicity for events/more events	1%
Later bus from Stratford/more info to get to Stratford	1%
Better coffee shops/cafes	1%
Longer opening hours at shops	1%
Wetherspoons	1%
Garden Centre	1%
Cash machine working	1%
Better lighting at night	1%
Better public transport	1%
Enjoyed visit to museum	1%
Sunday/Shops are closed	1%

It should be noted that the majority of comments received (with scores of 1% and 2%) were only mentioned by a small proportion of visitors. A full list of comments is shown in Appendix 1.

Excluding those who did not feel any additional facilities or services were needed, the next main responses were related to shops within the town. Many people felt they would like to see a wider range of shops on offer with longer opening hours. Parking, toilets, choice of places to eat and drink and signposting are usually the main additional facilities and services that are mentioned by visitors.

7.0 PRIORITY INDICATORS

7.1 Importance of Facilities

As noted earlier in this report, the benchmarking survey also requested visitors to indicate the importance of each factor to their visit, alongside their satisfaction with facilities in Alcester By identifying those factors considered to be of greatest importance, the impact on future development can be maximised. For instance, where both satisfaction and importance are low, these factors should be lower on a priority list of action. However, where satisfaction is low, but importance is high, these factors should be of higher priority.

Furthermore, issues rated as important can be most effectively used in marketing and PR activity to attract visitors to the town.

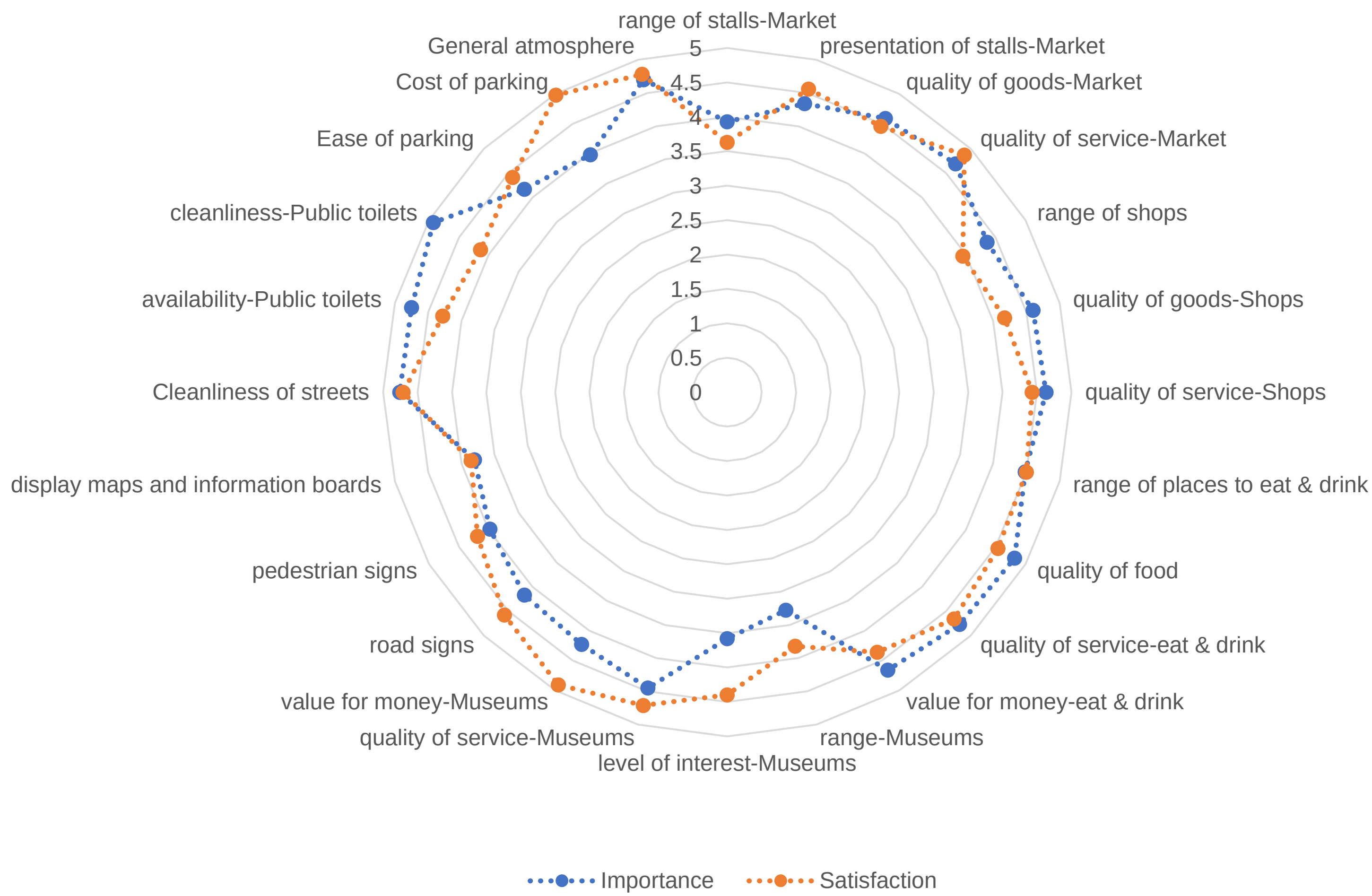
Table 7.1 details the average scores for all factors addressed in the survey, in terms of both importance and satisfaction. These results indicate the factors visitors feel are the most ‘important’ to their visit and those factors visitors were most ‘satisfied’ with. The toilets and places to eat and drink in Alcester were of greatest importance to visitors with an importance rating of 4.93 for the cleanliness of public toilets, 4.82 for the quality of food in places to eat and drink, 4.77 for the quality of service at places to eat and drink and 4.76 respectively for the cleanliness of streets and general appearance. Other factors that were of importance to visitors to Alcester, included 4.75 for the availability of public toilets and 4.70 for the general atmosphere of the town.

Of particular concern are the issues of high importance but relatively low satisfaction. For instance, the range of shops was felt to be important (4.36) but the satisfaction rating was only 3.95 along with value for money at places to eat and drink with an importance rating of 4.66 and a satisfaction score of 4.36. However, it is worth mentioning that most of these satisfaction scores are still above average and that overall in Alcester, the satisfaction rating on many of the factors were higher than the importance rating received.

Figure 7.1 displays the results graphically, indicating the relationship between importance and satisfaction. The graph clearly displays the satisfaction levels for all aspects of the visitor experience against the importance levels and shows those aspects that require most attention i.e. of high importance but below average satisfaction. There is some variation amongst the issues.

Table 7.1: Satisfaction and Importance Ratings for Alcester		
	Satisfaction	***Importance***
Market - range of stalls	3.63	3.93
Market - presentation of stalls	4.56	4.34
Market – quality of goods	4.46	4.59
Market – quality of service	4.87	4.69
Shops – range	3.95	4.36
Shops – quality of goods	4.17	4.60
Shops – quality of service	4.43	4.63
Places to eat and drink – range	4.50	4.48
Places to eat and drink – quality of food	4.54	**4.82**
Places to eat and drink – quality of service	4.66	4.77
Places to eat and drink – value for money	4.36	4.66
Museums and other places to visit – range	3.82	3.28
Museums and other places to visit – level of interest	4.40	3.58
Museums and other places to visit – quality of service	4.71	4.45
Museums and other places to visit – value for money	4.91	4.23
Ease of finding way around – road signs	4.58	4.17
Ease of finding way around – pedestrian signs	4.19	3.98
Ease of finding way around – display maps and info boards	3.85	3.80
Cleanliness of streets	4.71	4.76
Public toilets – availability	4.28	4.75
Public toilets – Cleanliness	4.14	**4.93**
Ease of parking	4.41	4.17
Cost of parking	4.98	3.98
Overall impression – general atmosphere	4.78	4.70
Overall impression – feeling of welcome	4.75	4.74
Overall impression – general appearance	4.84	4.76

FIGURE 7.1: SATISFACTION VS IMPORTANCE



APPENDICES

Appendix 1

Additional Services would have added to enjoyment of visit
A bit more touristy - some really good events would be a nice touch, it's pretty quiet
A cake shop
A decent toy shop
A Dunelm would be nice
A fast food outlet somewhere would be good. e.g. KFC, Burger King, McDonalds etc
A few less charity shops maybe
A few more quirky shops would be nice, it is mostly charity shops here now
A gardening shop would be useful
A good gift shop, I wanted to buy presents for the grandchildren where I have been staying
A good ice cream shop
A good restaurant, lots of pubs but no special restaurant
A larger market would be great- what's there is really nice, but more range would improve things, and a swimming pool would be good
A little map indicating points directional e.g. town trail
A market - when is it on please
A market in market place especially needs Saturday
A nice dress shop for older dressers maybe
A Wetherspoons would be nice, they are good value
Alright
Another better public toilet
As good as it gets when the suns out
Better transport links to Stratford - or at least better information about it
Bigger range of shops would be good - I've dropped my son off at an event and there's not that much to do for me really
Can't think of any
Car parks could be better signposted
Clearer indication of road crossings, it is a bit confusing
Clearer signs on car park, clarity re Waitrose limited area
Could have been a clearer sign towards the High Street
Don't think so
Free parking
I can't say there is anything missing
I don't think there is, I think it's lovely - perhaps less charity shops
I like it just the way it is
I wouldn't change anything
I'm happy
It's exactly how I want it to be
It's got everything
It's got everything I want
It's lovely as it is
It's lovely, atmosphere lovely, nothing else.
Lack of nice wine/tapas bar, bit more of holiday feeling needed
Later bus back from Stratford, 6:15 too early
Lights on in the evening would be nice

Local McDonalds with WIFI to attract more youngsters
Maps as we enter, but that is a bit unreasonable
Maybe an Italian restaurant something different to coffee shops for lunch would be good
More benches outside the shops on the High Street - there's a couple over one side but more for the elderly to sit on would be great
More charity shops
More evening eating places
More long stay parking
More maps of the town on display
More market stalls and more shops open on Sundays
More publicity for events, we don't hear much so it would be handy to know what's going on here
More seating perhaps
More shops, any shops
More stalls
More stalls
More stalls needed
More things to attract tourists - maybe an open street market once a week would bring more visitors in
More toilets
More working cash machines
Much better public transport and taxi service
No
No
No
No
No
No
No
No
No
No, it's nice
None
None
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Nothing else
Nothing, it would be a shame to spoil it
Outlets open later, I'm from Greece remember
Parking for longer - the only all-day car park is always full, so you end up on a time limit, we would stay for lunch if we could park for 2-3 hours
Pedestrianise the town centre
Proper butchers shop
Proper crossing needed for pedestrians
Public loos clearly signposted
Public toilets on car park could be improved
Signs for toilets
Some toilets up the High Street would be useful
Sunday/Shops are closed
The toilets really need some updating, also no mirror at all
Toilets
Unsure
We enjoyed visit to museum
We had been here loads of times before we found the toilets on Waitrose car park. That needs better signage and so does the play area behind Waitrose
Wish the parking was for longer- we would like to stay for a few hours, but Waitrose parking is only 90 minutes