the research solution

SHROPSHIRE

VISITOR SURVEY 2007

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FINAL REPORT

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SHROPSHIRE VISITOR SURVEY 2007

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SHROPSHIRE COUNTRY VISITOR SURVEY 2007

FINAL REPORT EXECUTIVE SUMMARY

The Research Solution was commissioned by Shropshire Tourism Research Unit in 2007 to undertake a major market research appraisal of the visitor profile and views of those visiting the Shropshire area. Interviewing was carried out at many visitor destinations across the whole of Shropshire. Sites included Severn Valley Railway, Bridgnorth Town Centre, Market Drayton Canal, Ellesmere Town Centre, Whittington Castle, Mile End TIC, Shrewsbury Abbey, Attingham Park, Ludlow Castle, Shropshire Hills Discovery Centre, Enginuity and Telford Shopping Centre.

The Shropshire Visitor Survey was carried out over the course of approximately 164 days from May to October 2007. As such, the survey period covered the peak, shoulder and off peak months, with interviewing taking place both at weekends and weekdays.

Types of Visitor

Almost two thirds (65%) of visitors to Shropshire, at all interview locations, are on a day visit. 11% are classified as being in the touring group and those staying overnight accounted for almost one in four visitors to Shropshire (23%). Of all visitors, only 4% were visiting from overseas

The Heart of England Tourism Region is the leading provider of day visitors to Shropshire. Just over two thirds (67%) of all day visitors were from within the Region. The North West region (13%) and Wales (13%) are the next biggest suppliers of day visitors to Shropshire. 7% of touring UK visitors originated from Lancashire and 8% of overnight UK visitors were from the West Midlands Metropolitian Area. In Shropshire, Australia (22%) and the USA (14%) are the main suppliers of overseas visitors.

Party composition

A total of 2,627 parties of visitors were surveyed. Almost all (2,623) provided demographic data on their group. The average (mean) number of people per group was approximately 2.9 giving a total of at least 7,607 people included in the survey sample. The most dominant groups interviewed were adult couples (40%) and those with their family (37%). A greater proportion of groups with children can be seen amongst the day visitor sector, where 36% of groups contained children. The lowest proportion of children is in the overseas visitor market where only 19% contained children in their party.

Age Profile of Visitors

The largest age group recorded was the group aged 55 to 64 years old (18%). The second largest group was children aged 0-15; adults aged 45 to 54 years old and 65+ (17% respectively).

Socio-economic groups

Across the whole of Shropshire, two thirds (66%) of visitors are in the ABC1 groups. Only 15% of visitors to Shropshire were classified as DE's.

New/Repeat Visitors

Just over three quarters of respondents (76%) are repeat visitors. The balance suggests that Shropshire has a tourism product that is meeting the expectations of its visitors, which encourages a repeat visit, yet is also appealing to those who are making a first visit.

Type of Previous Visit

In all, it can be seen that 72% of all visitors had previously been to the county as a day visitor and 13% had previously stayed overnight. 15% of repeat visitors to Shropshire stated that they had been to the area before and had been for both a day and a staying trip.

Of the day visitors who had been to Shropshire before, almost all (89%) were undertaking a similar trip to that taken last time, i.e. they had previously been on a day trip and were here now on a day trip. Looking at the overnight UK visitors, half (50%) had previously been on an overnight visit.

Number of times visited in last five years

Day visitors were the most frequent visitors to Shropshire with almost half (49%) returning to the county more than ten times in the past five years. 29% of overnight UK visitors have also visited the area more than ten times.

Length of Stay

Visitors were asked how long their whole trip was and how long they envisaged staying overnight in Shropshire. On average, overnight UK visitors spent 4.2 nights in Shropshire and overseas overnight visitors spent 5.8 nights in the county.

The average length of stay for both day and touring visitors in the County was approximately **4 hours 14 minutes;** this included all visitors at all locations and attractions. For UK day visitors the average stay was **4 hours 13 minutes**. Domestic touring visitors stayed slightly longer with an average stay of **4 hours and 22 minutes**. Overseas touring visitors stayed the longest with an average stay of **4 hours 26 minutes**.

Accommodation

The non-serviced market (including self catering) in Shropshire accounts for almost half (47%) of visitors choosing this form of accommodation on their trip. This represents the most popular accommodation for visitors to the area. Just over one quarter (27%) of overnight visitors to Shropshire stayed in serviced accommodation (hotels, guesthouses and B&B's).

Just under a quarter (23%) of respondents were staying with friends or relatives (VFR) in the county. This is always an under-estimated and under-appreciated market. In fact, VFR represents a significant proportion of all trips to the UK – 50% of all domestic trips and 39% of overseas visitors stay with friends and relatives.

Booking of Accommodation

Almost half, (48%) had pre-booked directly with their establishment (by phone), 18% had booked via the Internet and 17% had booked directly with the establishment (by email). When looking at bookings through Tourist Information Centres it was found that 1% of respondents had booked their accommodation at a TIC outside of Shropshire and 1% had used a TIC on arrival in Shropshire.

Mode of Transport

The majority (86%) of visitors arrived in Shropshire by car which is above the regional average. Only 6% of visitors to Shropshire used public transport as their main mode of transport to the area.

Activities Undertaken in Shropshire

Visitors were asked to indicate all the activities that they had been involved in whilst in Shropshire. The most popular activities undertaken were general sightseeing (54%), eating out (50%) and shopping/looking around shops (43%). Visitors were also asked to state the main activity they had undertaken or planned to undertake whilst in Shropshire. General sightseeing (26%) and visiting an attraction (21%) were the primary motives for interviewees to visit Shropshire. The majority of interviews were conducted at tourist attractions and town centres and, therefore, some bias may exist within the results.

New visitors were more likely to state general sightseeing (34%) as their main activity, compared with repeat visitors 23%.

Sources of information

Over half (53%) of all respondents stated a previous visit had encouraged them to return to Shropshire. An additional 18% stated a personal recommendation / word of mouth and 4% stated the internet had influenced their choice to visit.

80% of visitors had been influenced by some form of information when planning their trip, only 20% had not. A previous visit or personal recommendations were primary influences stated by visitors across all market segments.

Post Arrival Sources of Information

Overall, almost three quarters (72%) of visitors indicated that they had not used, or did not intend to use information during their trip.

Of those who did use/intend to use information during their trip, almost half (48%) indicated that they gathered the information from a Tourist Information Centre.

Environmental Affect

Respondents were asked if, when booking a holiday or choosing a day trip destination, they considered the impact their trip would have on the environment. Almost 8 out of 10 respondents stated no, they did not consider the impact when booking or choosing a day trip destination.

Of those who did consider the impact their trip would have on the environment, almost two fifths (38%) indicated that they felt locally sourced food and drink was an important consideration, followed by 29% who thought access to public transport was an important consideration.

Areas within Shropshire visited or intend to visit this trip

The most popular town / villages visited by respondents during this trip are; Shrewsbury, Telford, Ironbridge, Bridgnorth and Ludlow (28%, 19%, 18%, 17% and 13% respectively). Unsurprisingly, the touring segments are most likely to visit another town / village and the day visitors are least likely to.

Local awareness and visitation

All the attractions received very good ratings with all the mean scores being over 4.0 and the scores for 6 of the attractions being 4.5 or above.

Comments about Shropshire County

98% of visitors responded to this question. Across all categories, the countryside/rural/nature featured heavily as did the scenery / views.

Overall, 84% of visitors responded but 77% indicated that nothing had spoilt their visit to Shropshire. Of the comments that were made, 7% related to the weather and 2% stated that the lack of parking / cost of parking. 2% of visitors also stated that roadworks / traffic had spoilt their visit to the area.

Visitor Expenditure

The main expenditure of visitors to Shropshire is accommodation (31%), followed by eating/drinking (29%) and shopping (24%).

- On average, a party of day visitors in Shropshire spent £39.49. With an average day visiting party size of 2.9 people, the average expenditure rate per person is £13.62 during the day.
- An approximate level of spend can be seen amongst the touring party sample with an average party size of 2.6 people. A total of £56.23 was spent per party, or £21.63 per head per trip
- The average expenditure for UK overnight visitors was £287.42 per party; with a mean party size of 2.9 people, the average spend per person per trip was £99.11.
- An approximate level of spend can be seen amongst the overseas party sample; with an average party size of 3.0 people and a total of £65.55 spend per party, spend per head per trip stands at £21.85.

The spend estimated for all overnight overseas visitors is calculated to be £350.60 per party. With an average party size of 3.0 people, £116.87 was spent per head per trip by overseas visitors.

1.0 INTRODUCTION, BRIEF AND METHODOLOGY

1.01 Introduction

The Research Solution was commissioned by Shropshire Tourism Research Unit in 2007 to undertake a major market research appraisal of the visitor profile and views of those visiting the Shropshire area. Interviewing was carried out at many visitor destinations across the whole of Shropshire. Sites included Severn Valley Railway, Bridgnorth Town Centre, Market Drayton Canal, Ellesmere Town Centre, Whittington Castle, Mile End TIC, Shrewsbury Abbey, Attingham Park, Ludlow Castle, Shropshire Hills Discovery Centre, Enginuity and Telford Shopping Centre. 164 days of surveying was carried out from May to October 2007, during weekdays and weekends, term time and holidays.

The visitor survey provides important data to assist Shropshire's local authorities to appreciate the profile and importance of the visitors to the area over the period and to identify the level of tourism spend in the local economy. Such market research is a basic tool of strategic planning and monitoring.

1.02 Objectives of the Survey

The key elements required from the Visitor Survey were as follows:

- To improve the knowledge base and refresh baseline data on visitors to Shropshire.
- To establish the structure and pattern of visitation to the area's heritage, countryside and tourism attractions.
- To establish visitor profiles for each sector of the visitor market, e.g. day tripper, touring, overnight and overseas visitors.
- To gain a detailed understanding of current visitor motivations, information use, awareness, opinions, activity and movement within Shropshire.
- To identify the importance of activities in terms of raising the profile of the area's tourism image
- To determine the levels of new and repeat visitors to Shropshire.
- To identify the varying levels of spend in Shropshire by the market segments.

1.03 Acknowledgements

The study has received great support from the client team, in particular Emma Smith and Lucy Holder, and has been co-ordinated and analysed at The Research Solution by Christine King, Director and Caroline Rice, Project Manager.

This study provides a framework for constructive dialogue between Shropshire's local authorities and other tourism providers in the area. All can benefit from the findings and it should assist future tourism promotion and development of tourism in Shropshire.

1.04 Survey Methodology

The Shropshire Visitor Survey was carried out over the course of approximately 164 days from May to October 2007. As such, the survey period covered the peak, shoulder and off peak months, with interviewing taking place both at weekends and weekdays.

2,627 people were interviewed as identified in Table 1.1. Surveying was undertaken at various locations within Shropshire County.

The survey was conducted on a simple random basis. Interviewers asked the 'next person to pass' if they would participate. Residents of Shropshire County were not asked to participate in the survey, unless they were on an irregular leisure day visit lasting 3 hours or more. However, it is recognised that a small proportion may have been interviewed inadvertently and have been included in the analysis and results.

Questions were designed to take into account the fact that visitors could be at the beginning, middle or end of their current trip. Visitors were asked questions that involved making predictions for future actions i.e. future visits to an attraction, spending later on the trip.

Such predictions are noted in the text of the report and are treated with due caution.

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
- National and Regional figures are taken from the United Kingdom Tourism Survey 2006.

Table 1.1 Interview Locations					(2,627)
Location	***No.***	***%***	***Location***	***No.***	***%***
Bridgnorth Town Centre	86	3%	Town Centre – Pride Hill	58	2%
Bridgnorth Cliff Railway	64	2%	Town Centre – The Square	81	3%
Much Wenlock Priory	49	2%	Shrewsbury Castle (grounds)	58	2%
RAF Museum Cosford	51	2%	Quarry	39	1%
Rays Farm	38	1%	Percy Throwers Garden Centre	52	2%
Severn Valley Railway – Bridgnorth	24	1%	Shrewsbury Abbey	21	1%
Severn Valley Railway – Highley	2**	0%	Attingham Park	65	2%
Weston Park	47	2%	Shrewsbury Flower show	57	2%
Jackfield Tile Museum	50	2%	***Shrewsbury & Atcham BC***	***431***	
Bridgnorth DC	***411***		Cardingmill Valley (AONB)	93	4%
Whitchurch Town Centre	54	2%	Church Stretton Town Centre	12	0%
Whitchurch – Grindley Brook	52	2%	Clun Castle (AONB)	48	2%
Market Drayton Town Centre	50	2%	Bog Centre (AONB)	16	1%
Market Drayton Canal	59	2%	Bridges (AONB)	50	2%
Ellesmere Town Centre	24	1%	Ludlow Castle (AONB)	37	1%
Ellesmere – Mere	46	2%	Ludlow Town Centre	50	2%
Ellesmere – Canal	91	3%	Bishop's Castle	41	2%
Hawkstone Park Follies	55	2%	Shropshire Hills Discovery Centre	37	1%
Hodnet Hall Gardens	49	2%	Stokesay Castle	40	2%
North Shropshire DC	***480***		***South Shropshire DC***	***424***	
Oswestry Town Centre	73	3%	Telford Shopping Centre	72	3%
Mile End TIC	23	1%	Ironbridge TIC	52	2%
Cambrian Visitor Centre	49	2%	Blists Hill	63	2%
Whittington Castle	67	3%	Enginuity	37	1%
Park Hall Farm	71	3%	Wrekin (AONB)	98	4%
Moreton Garden Centre	57	2%	Wonderland	50	2%
Chirk Castle	70	3%	Hoo Farm	65	2%
Oswestry BC	***410***		Telford Town Park	34	1%
			Telford & Wrekin Borough	***471***	

***- due to the flooding caused by the severe weather conditions in July, this site was badly affected and no further interviews could be carried out at this location.*

It is acknowledged that on-site visitor surveys are liable to under-count certain sections of the visitor market. These include large-moving groups, i.e. groups, coach parties. 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 appears to be officials/government. Given the perceived importance of overseas markets, interviewers monitor the level of non-response (for all types of visitor) to check that certain nationalities are not under represented. If a person declined the offer of an interview, they were asked to state where they were from (UK/country) and thanked for their co-operation.

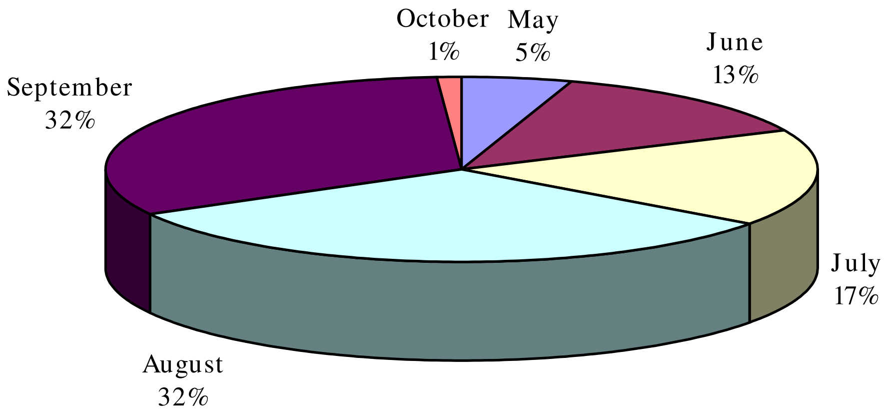
Of the 2,627 interviews, 5% were conducted in May, 13% in June, 17% in July, 32% in August, 32% in September and just 1% in October.

Table 1.2: Number of interviews by Local Authority Area *(2,627)*

	Number	***%***
Bridgnorth	411	16%
North Shropshire	480	18%
Oswestry	410	16%
Shrewsbury & Atcham	431	16%
South Shropshire	424	16%
Telford & Wrekin	471	18%

Table 1.2 represents the breakdown by interview location of the survey into the six local authority areas of the county.

Figure 1.1: Month of Interviews



Interviews were split over weekdays and weekends with 40% carried out on weekdays and 60% at weekends. (4% of interviews were carried out on a Bank Holiday.)

2.0 TYPES OF VISITOR

2.01 Visitor Segmentation

The survey data has been analysed in two ways. Firstly, by considering all visitors as a single market and secondly, by segmenting visitors into different groups according to the type of trip made. This approach helps to establish the differences and similarities between different types of visitor. Detailed information about various groups of visitors will assist in improving the effectiveness of marketing activities, visitor management and product development. Visitors can be divided into three segments according to the type of trip they are making to the county:

- ***Day Visitors****: The "day out" market - visitors, who start their journey from home and return there on the same day, includes independents and groups.*
- ***Touring Visitors****: Those visitors who are staying overnight away from home, but are not staying overnight in Shropshire. For example a family on holiday in Warwickshire may come to Shropshire for a day* ***or*** *someone stopping off in Shropshire en-route from home to another holiday destination.*
- ***Overnight Visitors****: Those visitors who spend one or more nights in Shropshire. This sector of the market includes those staying with family and friends as well as those using commercial accommodation.*

These three groups are subdivided into visitors who are resident in the UK and those from overseas. Figure 2 illustrates the structure of the survey sample visitor market according to the type of trip made.

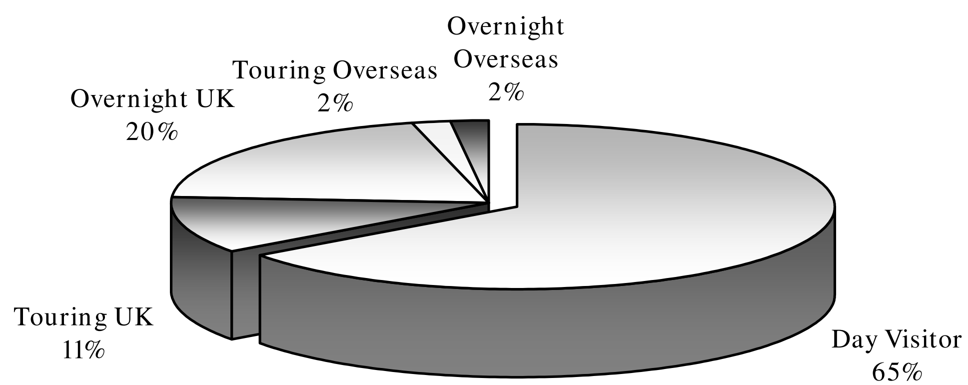
Almost two thirds (65%) of visitors to Shropshire, at all interview locations, are **on a day visit**. Unsurprisingly the majority (99%) of day visitors are domestic visitors on a day trip from home.

Of the total 2,627 domestic and overseas visitors surveyed across Shropshire, **11% are classified as being in the touring group**. The touring market is important, yet often overlooked or hidden within the day visitor sector.

Those **staying overnight accounted for almost one in four visitors to Shropshire (23%)** of the market, on a par with Staffordshire (22%, taken from the 2005 visitor survey) but lower than Worcestershire (28%, taken from the Worcestershire Visitor Survey 2005)

The complex structure of Shropshire's visitor market reinforces the view that there is no such thing as a typical visitor. The touring and overnight sectors can be divided into the domestic (UK) and the overseas markets. Of all visitors, only 4% were visiting from overseas.

Figure 2.1: Type of Visitor



The importance of the overnight visitor market should be recognised in terms of its economic impact (see section 15.0) and as potential growth markets for the future.

In order to put Shropshire's visitor market into context, it is worth comparing it to other destinations in the Heart of England Region. Table 2.1 shows that each local area has its own distinct market mix.

Table 2.1: Type of Visitor – Comparisons by County (2,627)

	Day Visitor	Touring UK	Overnight UK	Overseas
Shropshire County 2007	***65%***	***11%***	***20%***	***4%***
Coventry & Warwickshire Visitor Survey 2006	*60%*	*8%*	*19%*	*13%*
Worcestershire Visitor Survey 2005	*58%*	*16%*	*20%*	*7%*
Staffordshire Visitor Survey 2005	*71%*	*3%*	*21%*	*5%*

Shropshire is similar to the Heart of England region overall, and is fairly dependent upon the day trip market. It lies mid range compared to other counties' proportions of day visitors. In Shropshire, the overnight market is on a par when compared with the Coventry & Warwickshire, Staffordshire and Worcestershire surveys undertaken in 2006 and 2005.

2.02 Visitor Type by Location

The type of visitor interviewed at the various locations across Shropshire was predominantly day visitors as shown in Table 2.2.

Those locations with the vast majority of Day Visitors include: Telford Wonderland (94%), Telford Shopping Centre (93%) and Weston Park (89%). Almost two fifths (38%) of visitors to the Bog Visitor Centre (AONB) were touring UK. 62% of visitors interviewed at Grindley Brook (Whitchurch) were overnight UK visitors while 19% of visitors interviewed at Shrewsbury Abbey were overseas visitors.

Table 2.2: Type of Visitor at a Sample of Survey Locations *(2,627)*

	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
Bridgnorth Town Centre	77%	7%	12%	5%
Bridgnorth Cliff Railway	78%	11%	8%	3%
Much Wenlock Priory	55%	16%	24%	4%
RAF Museum Cosford	75%	16%	10%	-
Rays Farm	76%	11%	11%	3%
Severn Valley Railway – Bridgnorth	46%	**33%**	21%	-
Weston Park	**89%**	6%	4%	-
Jackfield Tile Museum	30%	52%	14%	4%
Whitchurch Town Centre	59%	7%	26%	7%
Whitchurch – Grindley Brook	33%	2%	**62%**	4%
Market Drayton Town Centre	76%	6%	14%	4%
Market Drayton Canal	17%	2%	73%	8%
Ellesmere Town Centre	83%	-	13%	4%
Ellesmere – Mere	78%	-	17%	4%
Ellesmere – Canal	59%	-	37%	3%
Hawkstone Park Follies	84%	-	15%	2%
Hodnet Hall Gardens	84%	-	14%	2%
Oswestry Town Centre	60%	12%	23%	4%
Mile End TIC	48%	13%	26%	**13%**

Cambrian Visitor Centre	57%	24%	8%	10%
Whittington Castle	84%	9%	6%	1%
Park Hall Farm	87%	8%	4%	-
Moreton Garden Centre	75%	14%	11%	-
Chirk Castle	63%	**33%**	-	4%
Town Centre – Pride Hill	62%	28%	3%	7%
Town Centre – The Square	60%	17%	12%	10%
Shrewsbury Castle (grounds)	66%	10%	12%	12%
Quarry	67%	10%	21%	3%
Percy Throwers Garden Centre	75%	13%	12%	-
Shrewsbury Abbey	29%	14%	29%	**29%**
Attingham Park	57%	31%	11%	2%
Shrewsbury Flower show	77%	12%	11%	-
Cardingmill Valley (AONB)	67%	2%	30%	1%
Church Stretton Town Centre	42%	-	**58%**	-
Clun Castle (AONB)	33%	13%	**52%**	2%
Bog Centre (AONB)	50%	**38%**	13%	-
Bridges (AONB)	58%	4%	36%	2%
Ludlow Castle (AONB)	49%	19%	24%	8%
Ludlow Town Centre	64%	6%	24%	6%
Bishop's Castle	44%	15%	39%	2%
Shropshire Hills Discovery Centre	43%	8%	46%	3%
Stokesay Castle	40%	10%	33%	**18%**
Telford Shopping Centre	**93%**	-	7%	-
Ironbridge TIC	52%	12%	29%	8%
Blists Hill	54%	11%	35%	-
Enginuity	49%	3%	41%	8%
Wrekin (AONB)	83%	2%	13%	2%
Wonderland	**94%**	-	6%	-
Hoo Farm	78%	3%	18%	-
Telford Town Park	88%	-	12%	-

Table 2.3 shows that Telford & Wrekin and Oswestry attracted the greatest proportions of day visitors (75% and 70% respectively) and Shrewsbury & Atcham district the greatest proportions of UK touring visitors (18%). Overnight domestic visitors were most prevalent in South Shropshire (35%) and North Shropshire (33%). Overseas visitors were also more likely to be seen in Shrewsbury & Atcham.

Table 2.3: Type of Visitor at a Sample of Survey Locations *(2,627)*

	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
Bridgnorth	68%	17%	12%	3%
North Shropshire	61%	2%	33%	4%
Oswestry	70%	16%	10%	4%
Shrewsbury & Atcham	64%	18%	12%	6%
South Shropshire	52%	9%	35%	4%
Telford & Wrekin	75%	4%	19%	2%

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

3.0 ORIGIN OF VISITORS

3.01 Categorising the visitor

Respondents were asked to state their normal place of residence. For domestic (UK) visitors the county of origin has been used as the basis for analysis and for overseas residents the country of origin is used. The data has been analysed according to the main types of visit - day, touring, overnight and overseas. This is the first step towards more detailed market segmentation.

3.02 Day Visitors

The catchment area for the day trip sector is broad. The Heart of England Tourism Region is the leading provider of day visitors to Shropshire. Just over two thirds (67%) of all day visitors were from within the Region.

The day visitor market from the North West region (13%) and Wales (13%) are of next most importance to Shropshire.

Figure 3.1– Origin of Day Visitors Regional Map

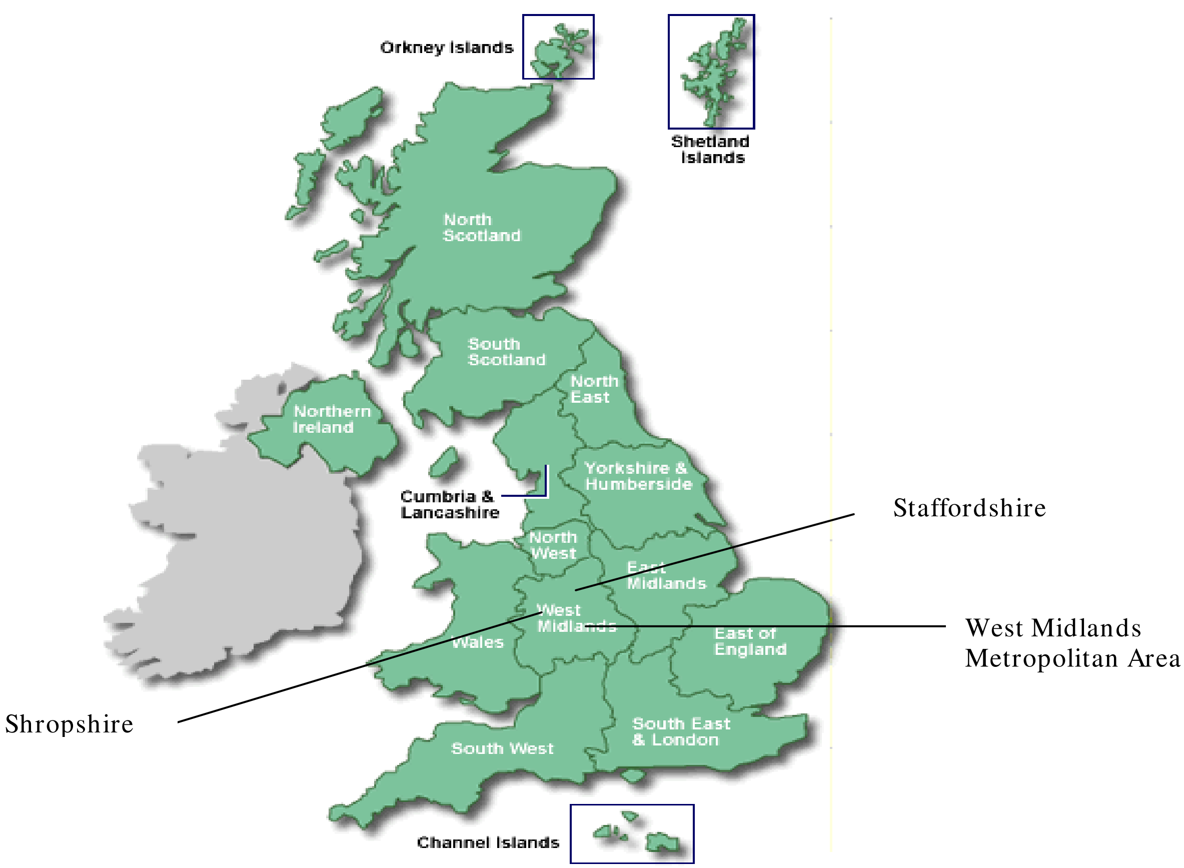


Table 3.1 below shows that there are distinct variations as to the performance of the counties concerned. Future promotional campaigns can take account of such information in order to target the existing and potential visitor markets in a more efficient manner.

Table 3.1: "Top Six" Origin of Day Visitors	*(1,712)*
	Percentage
Shropshire	33%
West Midlands	17%
Staffordshire	11%
Cheshire	9%
North Wales	8%
Worcestershire	5%

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

The core market is fairly focused, with the bulk of such visitors drawn from the surrounding Central Midlands and the neighbouring counties, accessible by quality road and rail systems. Unsurprisingly, the counties named all lie within an approximate 1-2 hours travel time from Shropshire. After the 'six' counties, a further 39 destinations generated one or more day visitors to Shropshire.

The day trip market is extremely competitive and will continue to be so, with competition coming from other destinations and other leisure activities (home entertainment, leisure retail parks, etc).

The day visitor market is a large and often under-rated segment. Although spend per head from this sector tends to be lower than those staying overnight, the volume of day visitors tends to provide the largest tourism spend across the Heart of England Tourism Region.

The strategy should be to concentrate efforts on sustaining and developing those day trip markets which have already proved to be good suppliers of visitors, and to develop potential new markets or enhancing existing markets. Marketing resources need to be continually targeted at the existing core markets such as the West Midlands and Staffordshire, in order to sustain the existing level of visitor movement and subsequent expenditure. Cheshire, North Wales and Worcestershire markets could be further developed.

3.03 Touring Visitors (UK)

11% of all visitors to Shropshire were described as "UK touring visitors". Touring visitors generally have many of the characteristics associated with the overnight visitor i.e. higher rate of expenditure, visiting attractions, origin, demographic profile, interests. These are an important market as they are people staying away from home, who have decided to visit Shropshire, but are not staying overnight in Shropshire itself.

Table 3.2: "Top Six" Origin of UK Touring Visitors *(280)*

	Percentage
Lancashire	7%
Cheshire	6%
South Wales	5%
West Midlands	5%
Cambridgeshire	4%
Manchester	3%

Table 3.2 shows that the areas of origination of UK touring visitors are very diverse, with the highest percentage of visitors travelling from Lancashire, but not staying in Shropshire.

After the 'six' counties, a further 42 destinations generated one or more UK touring visitors to Shropshire.

3.04 Overnight Visitors (UK)

One fifth (20%), of all visitors surveyed were UK residents staying overnight in Shropshire. The overnight visitor market is of particular importance in terms of the economic impact of such visitors. Overnight visitors not only stay longer than the day and touring visitor but also spend more on a daily basis.

The following analysis in Table 3.3 includes all UK visitors staying overnight in Shropshire. This shows the origin of such visitors by county/area.

Table 3.3: "Top Six" Origin of UK Overnight Visitors *(534)*

	Percentage
West Midlands	8%
Cheshire	7%
London/Middlesex	6%
Lancashire	5%
Staffordshire	4%
Hants/Isle of Wight	4%

NB: The information on overnight visitors includes those staying in many types of accommodation, i.e. with friends, relatives, camping, caravan and boats as well as in serviced accommodation.

The main market is predominantly drawn from a diverse base with the most popular single origin being the West Midlands (8%). Following that, Cheshire is the next highest origin (7%) followed by London/Middlesex (6%), Lancashire (5%), with Staffordshire and Hants/Isle of Wight providing 4% of overnight visitors respectively.

3.05 Overseas Visitors

A total of 101 visitors from 20 different countries were interviewed, making up 4% of all visitors. Overseas visitors are a market that can have a significant economic impact for Shropshire as a whole. Research undertaken in other parts of the country and the Heart of England region shows that visitors from overseas stay longer and spend more per day than other types of visitor.

Table 3.4 shows the country of origin of overseas visitors to Shropshire.

Table 3.4: "Top Ten" Origin of Overseas Visitors *(101)*

	Percentage
Australia	22%
USA	14%
Canada	8%
Germany	6%
New Zealand	6%
Other*	6%
Ireland	5%
Sweden	5%
Netherlands	3%
Spain	3%

**6% of visitors from overseas did not give their country of origin*

In Shropshire Australia (22%) and the USA (14%) are the main suppliers of overseas visitors.

Shropshire County receives a slightly higher number of overseas visitors from Australia compared with other counties across the Heart of England Region. The number of visitors from the USA is slightly lower when compared with the other counties across the region.

Table 3.5: "Top Ten" Origin of Overseas Visitors – County comparisons *(101)*

	Shropshire County 2007	Coventry & Warwickshire 2006	Worcestershire 2005	Staffordshire 2005
Australia	22%	20%	19%	20%
USA	14%	27%	24%	19%
Canada	8%	4%	9%	0%
Germany	6%	7%	7%	5%
New Zealand	6%	5%	10%	6%
Other*	6%	-	-	-
Ireland	5%	3%	5%	0%
Sweden	5%	-	-	-
Netherlands	3%	-	-	-
Spain	3%	-	-	-

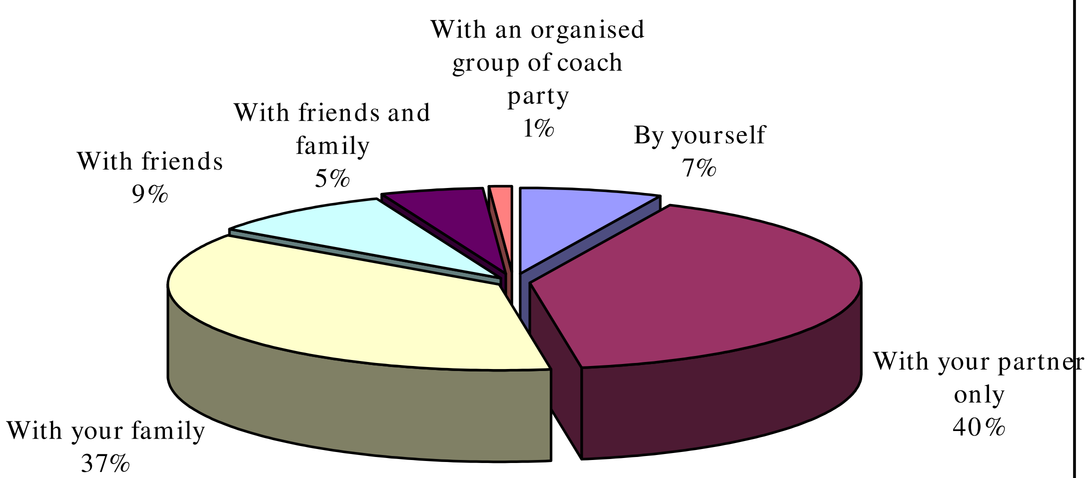
Across the Heart of England Region, the overseas visitor market is dominated by both the USA and Australia.

4.0 DEMOGRAPHIC PROFILE OF VISITORS

4.01 Party Composition

A total of 2,627 parties of visitors were surveyed. Almost all (2,623) provided demographic data on their group. The average (mean) number of people per group was approximately 2.9 giving a total of at least 7,607 people included in the survey sample. Figure 4.1 and Table 4.1 show the breakdown of party composition for each group. Respondents were asked which of the following statements given in the pie chart best described their party.

Figure 4.1: Party Composition



Clearly the most dominant groups interviewed were adult couples (40%) and those with their family (37%). However please note that numbers may be influenced by interview location i.e. certain attractions attract certain markets.

The UKTS 2006 results show that across the UK as a whole, almost two thirds (64%) of visitors travelled with their partner only. This is a higher proportion than those visitors to Shropshire, with two fifths (40%) travelling with their partner only.

4.02 Party composition by type of visitor

The table below shows how the party composition varies with the type of visitor.

Table 4.1: Party Composition by Type of Visitor (2,550)	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
By yourself	8%	5%	6%	12%
With your partner only	37%	51%	48%	35%
With your family	41%	30%	30%	26%
With friends	9%	8%	10%	17%
With friends and family	5%	2%	6%	9%
With an organised group or coach party	1%	3%	1%	2%

Two fifths (41%) of day visitors to Shropshire had travelled to the area with their families, followed by 37% who had travelled with their partner only. Over half (51%) of UK touring visitors had travelled to Shropshire with their partner only, followed by 48% of overnight UK visitors and 35% of overseas visitors, who had also travelled to the area with their partner only.

4.03 Age Profile

The breakdown of the different age groups and the ratios of males : females in each category are shown in the table and figure below. The figures include the ages of individuals who travelled to Shropshire as part of a coach party. However not all interviewees were able to give details of the coach party composition and so it should be noted that not all ages and gender groups of these parties are represented in the figures.

Table 4.2 shows the age profiles of people visiting locations within Shropshire. The largest age group recorded was the group aged 55 to 64 years old (18%). The second largest group was children aged 0-15; adults aged 45 to 54 years old and 65+ (17% respectively).

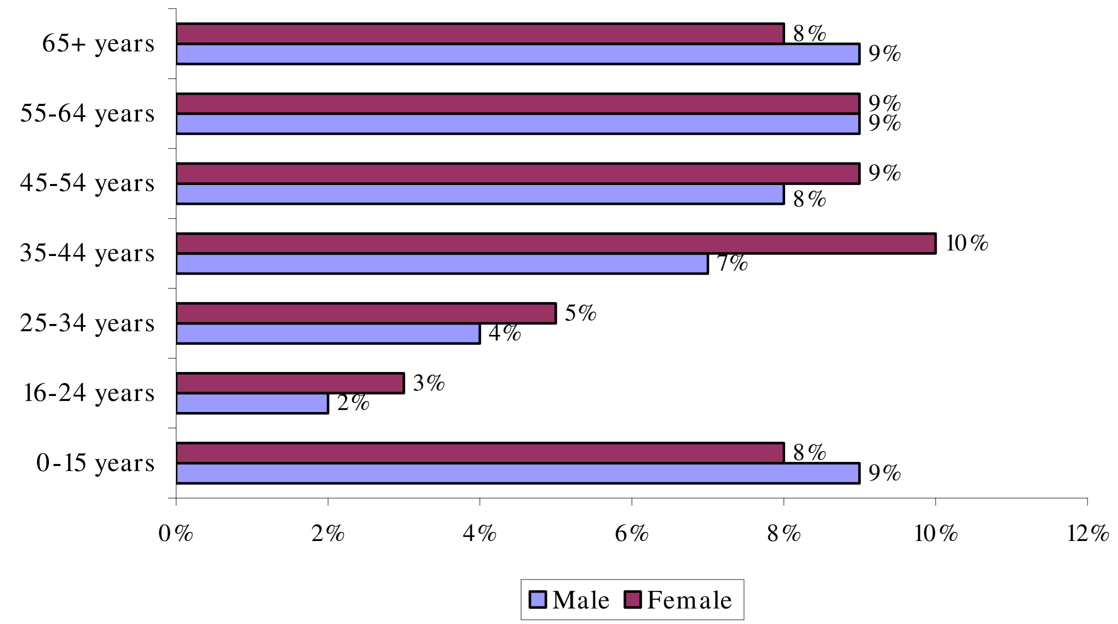
Table 4.2: Age Profiles – All Visitors			
	Male	**Female**	**Total**
0-15 years	9%	8%	17%
16-24 years	2%	3%	5%
25-34 years	4%	5%	9%
35-44 years	7%	10%	17%
45-54 years	8%	9%	17%
55-64 years	9%	9%	18%
65+ years	9%	8%	17%
Total	**48%**	**52%**	**100%**

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

Figures taken from the United Kingdom Tourism Survey 2006 (UKTS) show that just over two fifths (44%) of trip takers are aged between 35-54, higher than the figure for Shropshire with just over one third (34%) of visitors in this age group. The Shropshire percentage is on a par with the West Midlands regional figure.

Those aged 55+ represented 35% of trip takers to Shropshire, higher than both the UK (29%) and England (27%) averages.

Figure 4.2: Age Profiles - All visitors



4.04 The Family Market

The survey was undertaken during weekends/ weekdays, school holidays and term time. The proportion of family groups varies by type of visitor (trip), time and the interview location.

Figure 4.3: Family Market

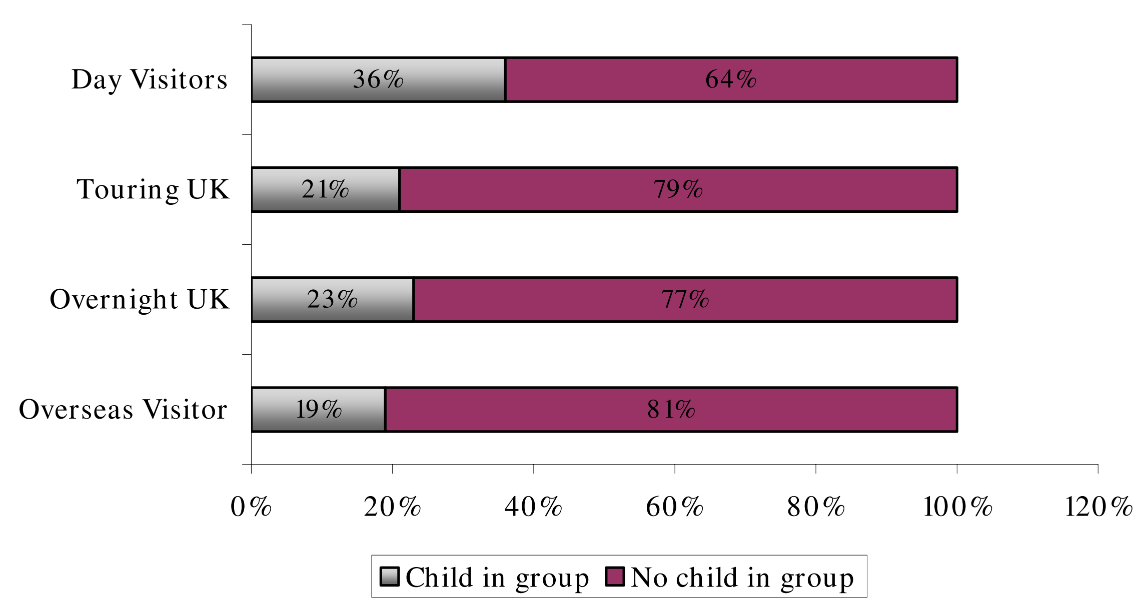


Figure 4.3 shows that a greater proportion of groups with children can be seen amongst the day visitor sector, where 36% of groups contained children. The lowest proportion of children is in the overseas visitor market where only 19% contained children in their party.

The proportions of visitors with children/no children in their groups throughout selected destinations in the region are shown below.

- Shropshire 2007 – No Children 69%, Children 31%
- Coventry & Warwickshire 2006 – No Children 70%, Children 30%
- Worcestershire 2005 – No Children 79%, Children 21%
- Staffordshire 2005 – No Children 63%, Children 37%

Just over one third (36%) of trip takers in the UK have children in their party. This is a slightly higher proportion than the Shropshire County average of 31%.

4.05 Day Visitors

A total of 1,710 groups of day visitors provided demographic data for analysis, giving an average (mean) of 2.9 people per group - a total of at least 4,959 people included in the survey sample. 40% of day visitors were visiting as part of a family. The structure of these groups is shown below in Figure 4.4 and Table 4.3.

Figure 4.4: Party Composition - Day Visitors

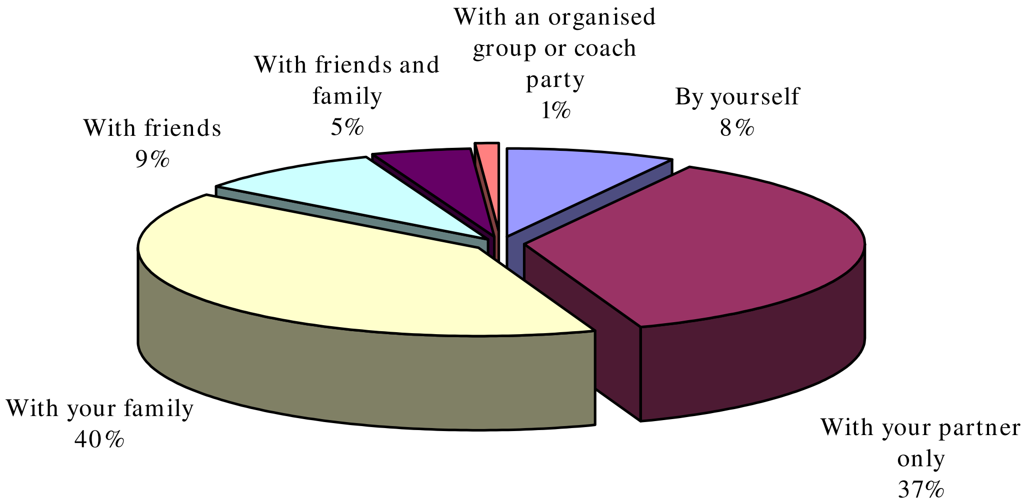


Table 4.3: Age Profiles – Day Visitors			
	Male	**Female**	**Total**
0-15 years	10%	10%	20%
16-24 years	2%	3%	5%
25-34 years	4%	5%	9%
35-44 years	8%	10%	18%
45-54 years	8%	9%	17%
55-64 years	8%	8%	16%
65+ years	8%	8%	16%
Total	**48%**	**53%**	**101%**

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

4.06 Touring (UK) Visitors

A total of 279 touring (UK) groups, comprising 734 people in total provided demographic data, giving an average (mean) of 2.6 people per group.

Figure 4.5: Party Composition - Touring UK Visitors

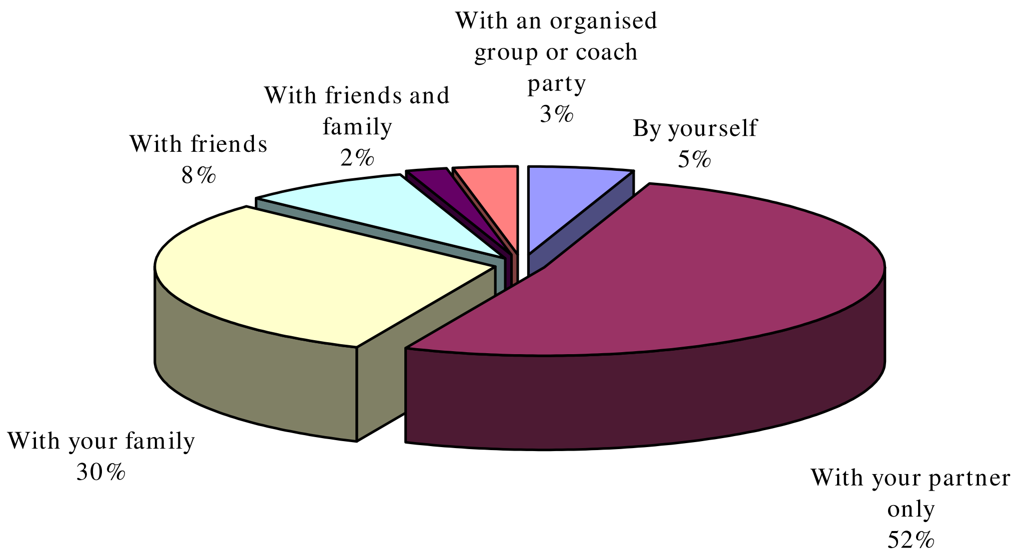


Table 4.4: Age Profiles – Touring UK Visitors			
	Male	**Female**	**Total**
0-15 years	7%	5%	12%
16-24 years	1%	1%	2%
25-34 years	3%	3%	6%
35-44 years	6%	8%	14%
45-54 years	8%	11%	19%
55-64 years	12%	12%	24%
65+ years	12%	10%	22%
Total	**49%**	**50%**	**99%**

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

4.07 Overnight UK Visitors

533 groups of domestic overnight visitors comprising 1,561 people in total provided demographic data, giving an average (mean) of 2.9 people per party.

Figure 4.6: Party Composition - Overnight UK Visitors

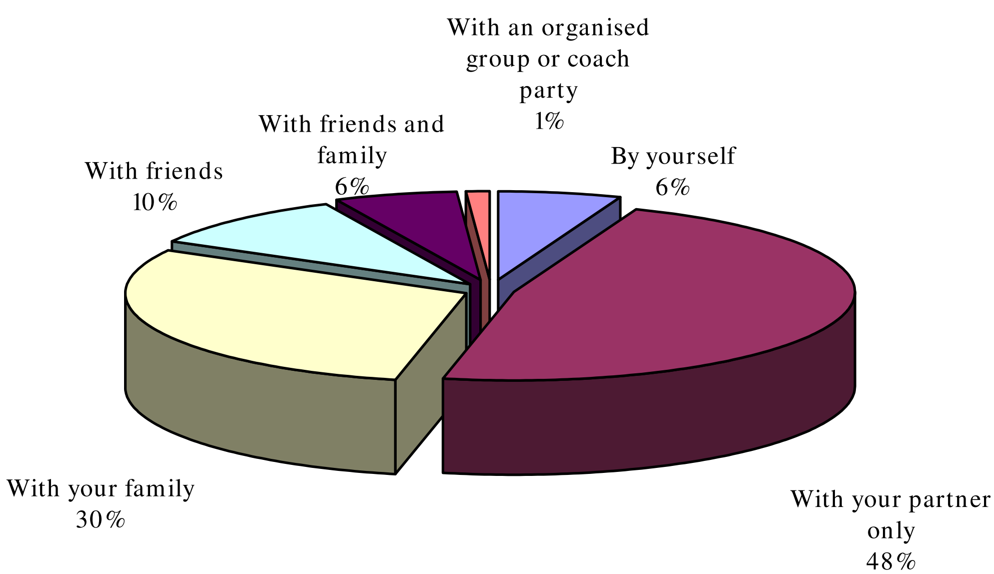


Table 4.5: Age Profiles – Overnight UK Visitors			
	Male	**Female**	**Total**
0-15 years	7%	6%	13%
16-24 years	2%	2%	4%
25-34 years	3%	5%	8%
35-44 years	7%	9%	16%
45-54 years	9%	9%	18%
55-64 years	11%	11%	22%
65+ years	9%	9%	18%
Total	**48%**	**51%**	**99%**

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

4.08 Overseas Visitors

101 groups of overseas visitors comprising 306 people in total provided demographic data, giving an average (mean) of 3.0 people per party.

Figure 4.7: Party Composition - Overseas Visitors

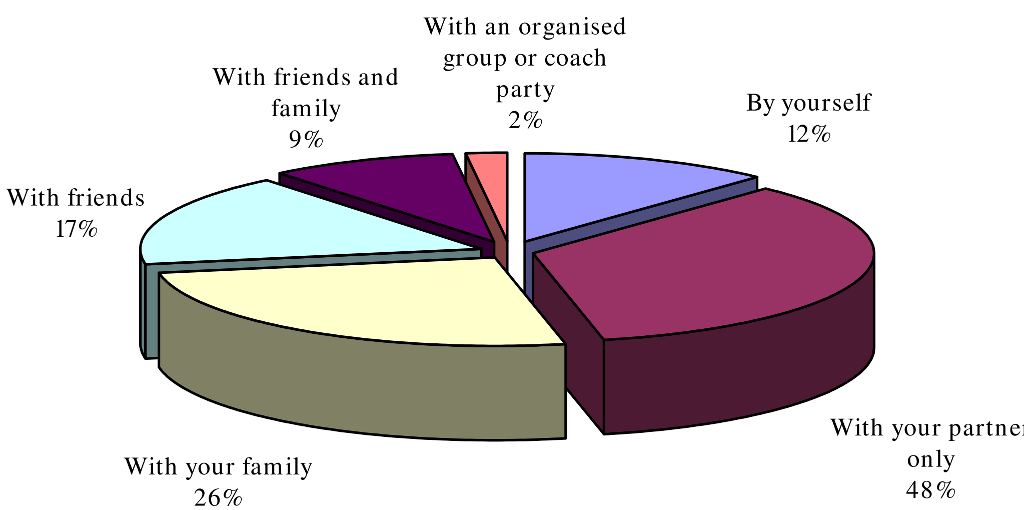


Table 4.6: Age Profiles – Overseas Visitors			
	Male	**Female**	**Total**
0-15 years	4%	5%	9%
16-24 years	3%	2%	5%
25-34 years	3%	3%	6%
35-44 years	7%	11%	18%
45-54 years	12%	12%	22%
55-64 years	12%	9%	21%
65+ years	9%	9%	18%
Total	**50 %**	**51%**	**101%**

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

5.0 SOCIO ECONOMIC GROUPINGS

5.01 Categorising the visitor

Visitors were asked to describe the occupation of the chief wage earner in their household and to indicate by means of a show card which socio-economic group they thought applied. All responses were crosschecked with any misleading cases removed from this analysis. It is accepted that this method provides a rough guide to the type of visitor in the county. If a more accurate profiling of visitors is required, use can be made of the UK postcodes supplied for PIN analysis.

The key to the groups is based upon the Market Research Society standards. In broad terms the groups are as follows.

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

Figure 5.1: Socio Economic Group

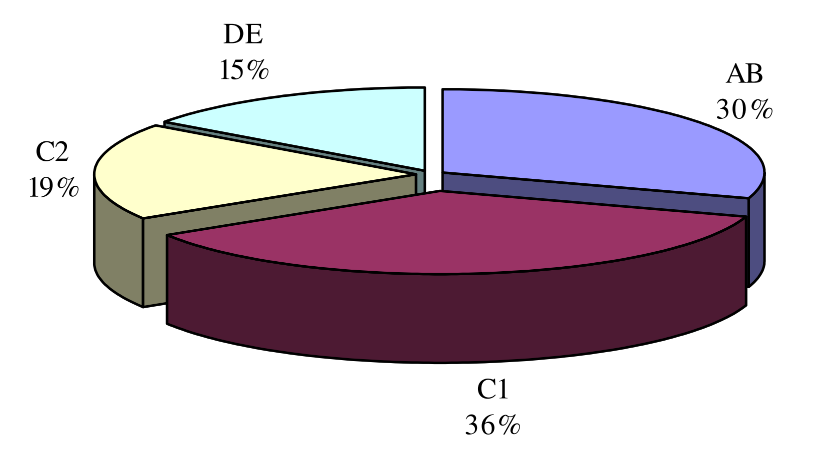


Table 5.1: Socio Economic Group – by Type of Visitor *(2,611)*

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
AB	30%	26%	35%	38%	51%
C1	36%	36%	33%	38%	32%
C2	19%	22%	17%	14%	7%
DE	15%	17%	16%	10%	10%

Across the whole of Shropshire, two thirds (66%) of visitors are in the ABC1 groups.

Comparing the structure of the three domestic markets it is evident that the proportion of ABC1 visitors varies in each segment. The overseas market in Shropshire has 83% ABC1 visitors, higher than all other segments, followed by the UK overnight market with 76% of visitors in the ABC1 category.

The lowest level of ABC1 visitors lies in the day visitor segment (62%).

Only 15% of visitors to Shropshire were classified as DE's.

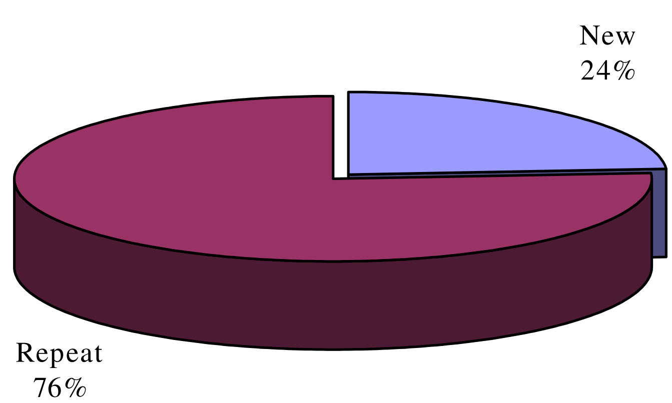
Almost three quarters (72%) of visitors to the West Midlands Region are in the ABC1 category, slightly higher than the Shropshire average of 66% and the UK average of 62% in this category.

6.0 NEW/REPEAT VISITORS

6.01 Segment Variation

Visitors were asked if they had ever been to Shropshire on a previous occasion and if so what type of trip it had been. The presence of first time visitors to Shropshire is important in terms of visitor management, presuming their lack of knowledge about the area. Just over three quarters of respondents (76%) are repeat visitors. In many respects, the repeat visitor is easier to attract as they will know the general nature of what a visit is likely to involve, for example, how long it takes to get there and what there is to see and do. It is worth noting, however, that being a repeat visitor does not automatically mean that the knowledge of Shropshire and its area and attractions is comprehensive and, furthermore, repeat visitors may have entrenched patterns of behaviour that may be difficult to influence through visitor management.

Figure 6.1: New / Repeat Visitors



The balance suggests that Shropshire has a tourism product that is meeting the expectations of its visitors, which encourages a repeat visit, yet is also appealing to those who are making a first visit. The proportion of internal visitors will also affect the split of new to repeat visitors with knowledge of the area more prominent than visitors from outside the Shropshire area.

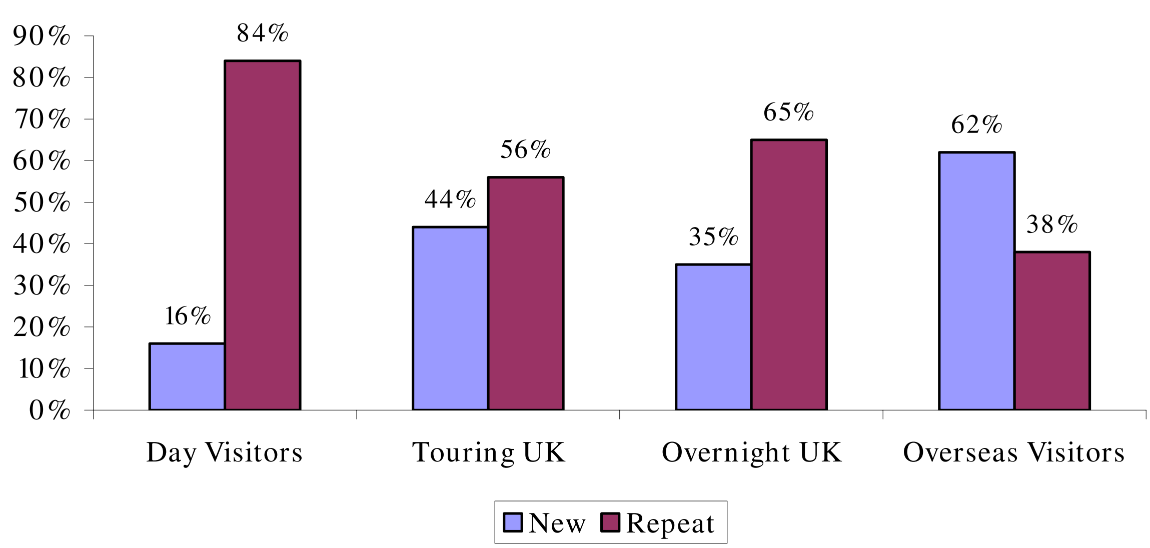
Table 6.1 shows how the visitor market in Shropshire compares with other counties within the Heart of England Region.

Table 6.1: New/Repeat Visitors		***(2,621)***
	New	**Repeat**
Shropshire 2007	**24%**	**76%**
Coventry & Warwickshire 2006	15%	85%
Worcestershire 2005	16%	84%
Staffordshire 2005	12%	88%

The above table shows that Shropshire has a tourism product that attracts a higher proportion of new visitors, compared to other counties throughout the Heart of England Region.

Further research indicates that there is variation in new and repeat trade shown by surveying at different attractions, general locations and between the market segments. The repeat ratio for UK overnight visitors is 65%, whilst the day visitor market relies heavily on repeat visitors with 84% having been to the county on a previous occasion.

Figure 6.2: New/Repeat Visitors by Type of Visitor



Unsurprisingly, the majority of day visitors to Shropshire (84%) have visited the area before, compared to only 38% of overseas visitors. A slightly higher proportion of overnight UK visitors have visited Shropshire before, compared with touring UK visitors (65% and 56% respectively).

6.02 Types of previous visit to Shropshire

Having identified the new and repeat elements, visitors were then asked what type of trip they had made in the past. In all, it can be seen that 72% of all visitors had previously been to the county as a day visitor and 13% had previously stayed overnight.

15% of repeat visitors to Shropshire stated that they had been to the area before and had been for both a day and a staying trip.

Figure 6.3: Previous Type of Visit to Shropshire

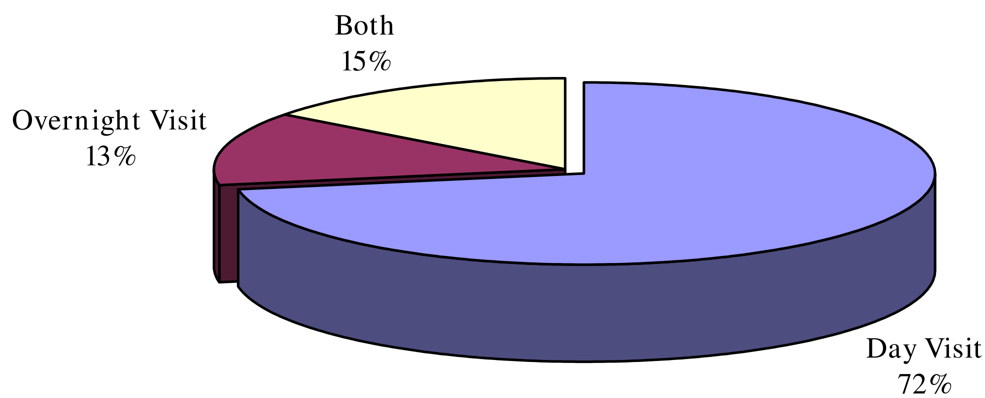


Table 6.2 below highlights the different characteristics of the market segments with respect to the type of previous visit they had made.

Table 6.2: Type of Previous Visit				(1,850)
	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
Day Visit	89%	58%	16%	37%
Overnight Visit	1%	21%	50%	49%
Both	9%	21%	34%	14%

Of the day visitors who had been to Shropshire before, almost all (89%) were undertaking a similar trip to that taken last time, i.e. they had previously been on a day trip and were here now on a day trip. A small proportion had also been before as an overnight visitor (1%) and 9% had previously visited for overnight stay and for the day.

Looking at the overnight UK visitors, half (50%) had previously been on an overnight visit. A further 34% of visitors had previously been to Shropshire for both a day visit and an overnight trip, with 16% having previously visited as a day visitor.

6.03 Time since last visit to Shropshire

Visitors who had been to Shropshire before were asked how many times they had visited in the past five years.

Table 6.3: Number of Previous Visit					(1,881)
	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Zero	8%	5%	17%	15%	11%
1 time	8%	6%	16%	8%	36%
2 times	11%	9%	18%	14%	17%
3-5 times	21%	19%	28%	25%	19%
6-10 times	11%	12%	6%	9%	8%
More than 10 times	42%	49%	15%	29%	8%

Day visitors were the most frequent visitors to Shropshire with almost half (49%) returning to the county more than ten times in the past five years. 29% of overnight UK visitors have also visited the area more than ten times.

UK visitors touring into the county were the market least likely to have visited Shropshire within the last five years (17%). Only 5% of day visitors who had visited Shropshire before had not visited within the last five years.

7.0 LENGTH OF STAY

7.01 Length of Stay in Shropshire

Visitors were asked how long their whole trip was and how long they envisaged staying overnight in Shropshire. On average, overnight UK visitors spent 4.2 nights in Shropshire and overseas overnight visitors spent 5.8 nights in the county.

The following Table 7.1 illustrates the breakdown of length of stay in Shropshire for the overnight visitors staying less than 2 months.

Table 7.1: Length of Stay – Nights *(566)*

		UK/Overseas Overnight	UK Overnight	Overseas Overnight
SHORT BREAK	**1 Night**	16%	17%	11%
(60 %)	**2 Nights**	24%	24%	24%
	3 Nights	20%	20%	18%
LONG STAY	**4 Nights**	7%	7%	11%
(40 %)	**5 Nights**	6%	6%	7%
	6 Nights	5%	5%	2%
	7 Nights	11%	11%	9%
	8+ Nights	11%	10%	18%

As the table shows, length of stay for staying visitors (both overseas and domestic combined) to Shropshire was more on the Short Break length rather than Long Stay (60% and 40% respectively.) There has been a shift over the last 5 years with domestic visitors favouring short breaks in the UK and main holidays abroad.

Almost one fifth of overseas visitors (18%) staying overnight were in the county for a stay of eight nights or more compared with only 10% of domestic overnight visitors.

Table 7.2 indicates the average length of stay of overnight visitors to Shropshire according to the type of accommodation used.

Table 7.2: Average Length of Visit			***(566)***
Overall Average Length of Stay			**4.4 nights**
All UK Overnight			**4.2 nights**
All Overseas Overnight			**5.8 nights**
UK- Average Length of Stay			***3.7 nights***
West Midlands Region - Average Length of Stay			***2.5 nights***
All Overnight	-	*Serviced Accommodation*	**2.7 nights**
Visitors	-	*Non-serviced Accommodation*	**5.5 nights**
	-	*Friends/relatives*	**4.1 nights**

Overall, visitors to Shropshire are staying for a longer period when compared with visitors to the UK and the West Midlands region.

7.02 Day/Touring Visitors Length of Stay in Shropshire

1,402 responding domestic and overseas visitors surveyed who were in Shropshire for a day or touring trip, were asked how long (in hours) they intended to spend in Shropshire. The average length of stay for both day and touring visitors in the County was approximately **4 hours 14 minutes;** this included all visitors at all locations and attractions. For UK day visitors the average stay was **4 hours 13 minutes**. Domestic touring visitors stayed slightly longer with an average stay of **4 hours and 22 minutes**. Overseas touring visitors stayed the longest with an average stay of **4 hours 26 minutes**.

Table 7.3 illustrates the variation in time spent in Shropshire as a whole by non-locals during the day's visit.

Table 7.3: Length of Stay – hours				*(1,991)*
Number of hours	**Total**	**Day Visitors**	**UK Touring**	**Overseas Touring**
One hour	**1%**	1%	3%	-
Two hours	**9%**	9%	7%	-
Three hours	**31%**	31%	30%	34%
Four hours	**26%**	26%	21%	32%
Five hours	**13%**	13%	11%	11%
Six hours	**10%**	9%	15%	11%
Seven hours	**5%**	4%	5%	7%
Eight hours	**4%**	4%	6%	2%
Nine hours +	**2%**	3%	1%	2%

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

UK touring visitors stayed for the longest period of time whilst in the county with over a quarter (27%) staying for 6 or more hours. Almost 8 out of 10 (77%) of overseas touring visitors stayed in the county for between 3 and 5 hours compared with 62% of UK touring visitors.

Just over two fifths (41%) of repeat visitors stayed in the area for between 1-3 hours, compared with only slightly fewer new visitors (38%). Almost 6 out of 10 (56%) of new visitors were in the area for between 4-6 hours compared with 46% of repeat visitors.

Table 7.4: Length of stay by New / Repeat Visitors *(1,987)*

Number of hours	New	Repeat
One hour	1%	1%
Two hours	7%	9%
Three hours	30%	31%
Four hours	28%	25%
Five hours	15%	12%
Six hours	13%	9%
Seven hours	3%	5%
Eight hours	2%	4%
Nine hours +	1%	3%

8.0 ACCOMMODATION

8.01 Accommodation used in Shropshire

CATEGORIES:

Serviced accommodation

Serviced accommodation is defined as those establishments that supply a meal (breakfast, lunch or dinner) and include hotels, B&B's, guesthouses, inns and public houses.

Self catering establishments offer a designated area in which to prepare meals, such as a fully equipped kitchen.

Non-serviced accommodation

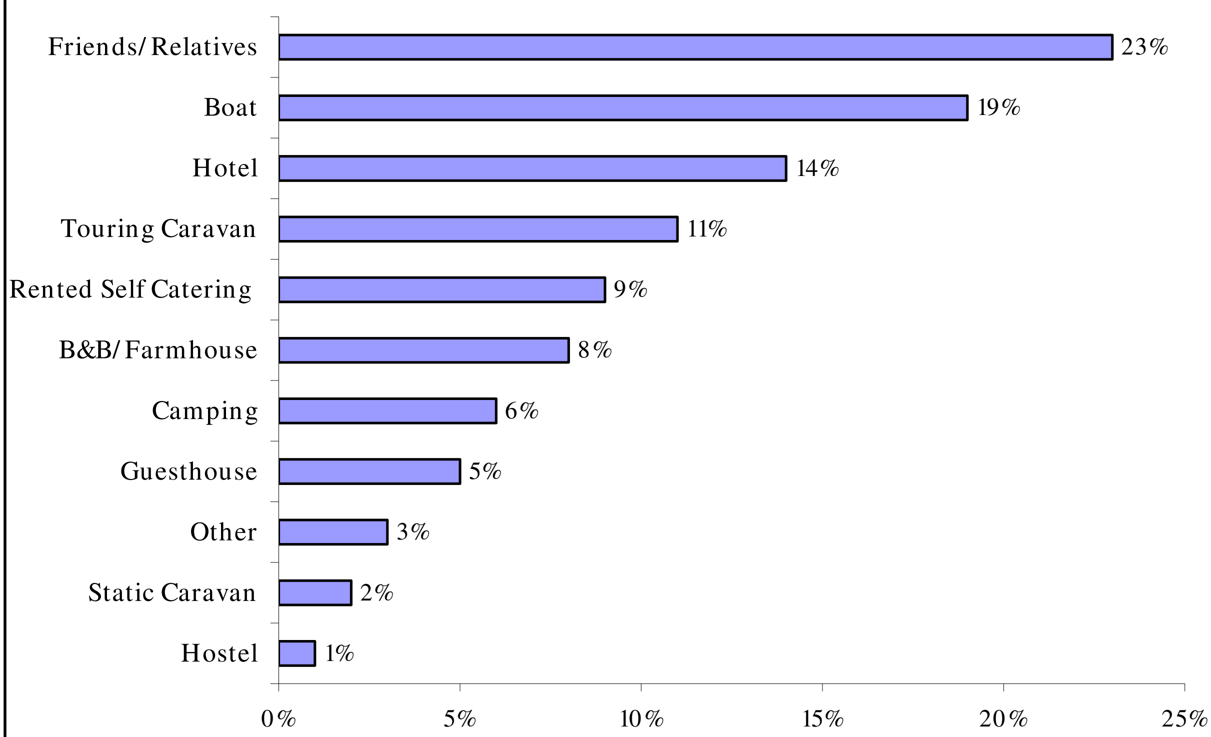
Youth hostels, university accommodation, caravan parks and campsites that offer a certain amount of facilities

VFR

Visiting friends and relatives

Figure 8.1 shows the type of accommodation overnight visitors to Shropshire used on their visit.

Figure 8.1: Accommodation Used



The non-serviced market (including self catering) in Shropshire accounts for almost half (47%) of visitors choosing this form of accommodation on their trip. This represents the most popular accommodation for visitors to the area. Just over one quarter (27%) of overnight visitors to Shropshire stayed in serviced accommodation (hotels, guesthouses and B&B's).

Just under a quarter (23%) of respondents were staying with friends or relatives (VFR) in the county. This is always an under-estimated and under-appreciated market. In fact, VFR represents a significant proportion of all trips to the UK – 50% of all domestic trips and 39% of overseas visitors stay with friends and relatives.

It is important to remember that the impact of the overnight visitor market only becomes apparent when taking into account the additional factors such as; length of stay, spend per head, number of people per group, distribution of expenditure within the local economy etc.

Table 8.1: Main Types of Accommodation used in Shropshire (571)			
	Total	**Overnight UK**	**Overseas Overnight**
Friends/Relatives	**23%**	22%	28%
Boat	**19%**	19%	26%
Hotel	**14%**	14%	9%
Touring Caravan	**11%**	12%	2%
Rented Self Catering (Cottage/flat/house)	**9%**	9%	9%
Bed & Breakfast / Farmhouse	**8%**	8%	4%
Camping	**6%**	6%	4%
Guesthouse	**5%**	5%	9%
Other	**3%**	3%	4%
Static Caravan	**2%**	2%	-
Hostel	**1%**	0%	2%
University/college accommodation	**0%**	0%	2%

Table 8.1 shows that visitors staying with friends / relatives are an important part of the tourism product for the area. The most popular choice for overseas visitors staying overnight in Shropshire is non serviced accommodation (41%). Serviced accommodation is the most popular choice for domestic visitors staying overnight (27%).

As the table above shows, a high percentage of visitors stated canal boat / boat as their main form of accommodation used in Shropshire. It should be noted that a high proportion of canal / riverside locations were used as interview sites and this may have affected the results. However, other surveys carried out across the Heart of England Region of the last few years have shown an increase in the number of visitors choosing this form of transport and accommodation.

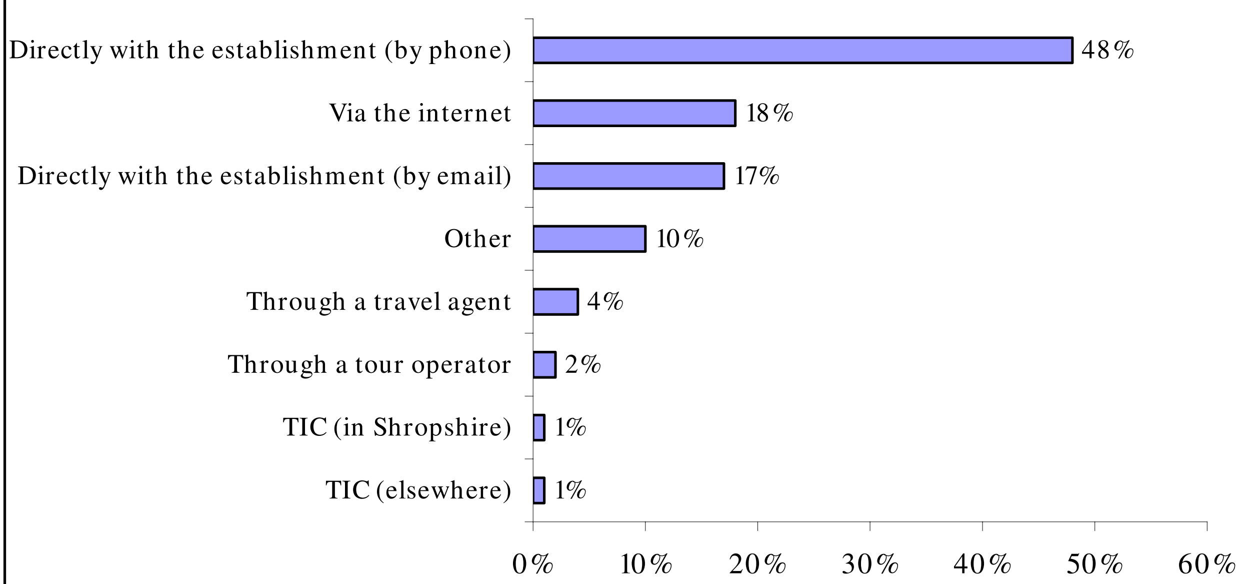
New visitors made greater use of all forms of serviced accommodation compared to repeat visitors (new 37%, repeat use 21%). Unsurprisingly repeat visitors were far more likely to stay with friends and relatives (28%) compared to new visitors (14%).

8.02 Pre-booking of Accommodation

Of the visitors staying overnight (excluding those visitors staying with friends and relatives), 315 people commented on how they had booked their accommodation. Almost half, (48%) had pre-booked directly with their establishment (by phone), 18% had booked via the Internet and 17% had booked directly with the establishment (by email).

When looking at bookings through Tourist Information Centres it was found that 1% of respondents had booked their accommodation at a TIC outside of Shropshire and 1% had used a TIC on arrival in Shropshire.

Figure 8.2: Pre-booked accommodation



'Other' was cited by 10% of respondents, answers included: Booked on site, member of National Trust, through friends and through Caravan Club.

More domestic visitors (67%) had pre-booked from home direct to the establishment than visitors from overseas (39%). There was a split between new and repeat visitors booking directly with the establishment, with 69% of new visitors and 60% of repeat visitors using this method.

60% of holiday trips to the UK involved some form of firm booking made in advance. The most popular type of advanced booking was directly through an accommodation provider, with 61% of bookings using this method.

8.03 Rating of Accommodation

Respondents were asked to rate the range, quality of service and value for money of the accommodation available in Shropshire. Respondents rated facilities on a scale of 1 to 5 (1 very poor and 5 very good).

Table 8.2: Rating of Accommodation *(570)*

	Mean	Very Good	Good	Average	Poor	Very Poor
Range of accommodation	**4.4**	48%	42%	7%	3%	-
Quality of service at accommodation	**4.5**	61%	31%	7%	1%	-
Value for money at accommodation	**4.4**	56%	30%	11%	2%	1%

Ratings given to accommodation establishments in Shropshire were generally high, with an average (mean) score of over 4 out of 5 given to each of the options shown in the table above.

The majority (90%) of respondents stated that the range of accommodation available in the Shropshire area was good or very good. Only 3% stated that the range was poor.

Similarly 92% of respondents stated that the quality of service in the establishment at which they were staying was good or very good.

High ratings were also given for value of money (4.4), with 86% of respondents stating good or very good when asked.

9.0 MODE OF TRANSPORT

9.01 Car is Dominant Transport Mode

In most visitor surveys, the principal mode of transport used to arrive at a visitor destination is the car. The regional average is 77% use of the car (UKTS 2006). Shropshire is above the regional average, with 86% of all respondents using cars. This is on a par with the Worcestershire survey undertaken in 2005, where 84% of visitors arrived at their destination by car, but slightly below the Staffordshire 2005 average of 92%. The use of car was highest amongst repeat visitors (86%) compared with 77% of respondents visiting the county for the first time.

Across the region as a whole, public transport (regular bus/coach and train) accounts for 13% of all domestic visitors' use of transport (UKTS 2006). Only 6% of visitors to Shropshire used public transport as their main mode of transport to the area.

A higher percentage of new visitors used coach tours (6%) in comparison with only 1% of repeat visitors, and a slightly higher proportion of first time visitors used a canal boat (6%) to access the region, compared to 4% of repeat visitors.

Table 9.1: Mode of Transport *(2,619)*

	All	New	Repeat
Car/Motorcycle/Van	**86%**	79%	88%
Canal Boat	**4%**	6%	4%
Train	**3%**	4%	3%
Bus/Coach service	**3%**	3%	3%
Coach tour	**2%**	6%	1%
Bicycle	**1%**	0%	1%
Walked	**1%**	1%	1%
Other	**1%**	1%	1%

Across the various market segments of visitors visiting the county, the transport mode varied significantly. For example, 89% of day visitors came by car, compared with 74% of overnight UK visitors. The use of canal boats by overnight UK and overseas visitors is fairly high (18% and 14% respectively). However, it must be noted that several of the locations used in the survey were located at the canal areas within some of the districts. The Staffordshire and Worcestershire 2005 surveys only noted 1% respectively of visitors using this form of transport.

Table 9.2: Mode of Transport by Type of Visitor *(2,619)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Car/ Motorcycle/ van (private)	84%	89%	83%	74%	64%
Canal Boat	4%	0%	0%	18%	14%
Train	3%	3%	3%	4%	7%
Bus/ Coach service	3%	4%	3%	1%	2%
Coach tour	2%	2%	7%	1%	1%
Car/ motorcycle/ van (hire)	1%	1%	1%	1%	6%
Bicycle	1%	1%	1%	1%	-
Walked	1%	1%	1%	1%	3%
Other	1%	0%	2%	1%	3%

NB: Totals may not add up to 100% due to rounding. 'Other' responses include visitors using the park and ride and minibus.

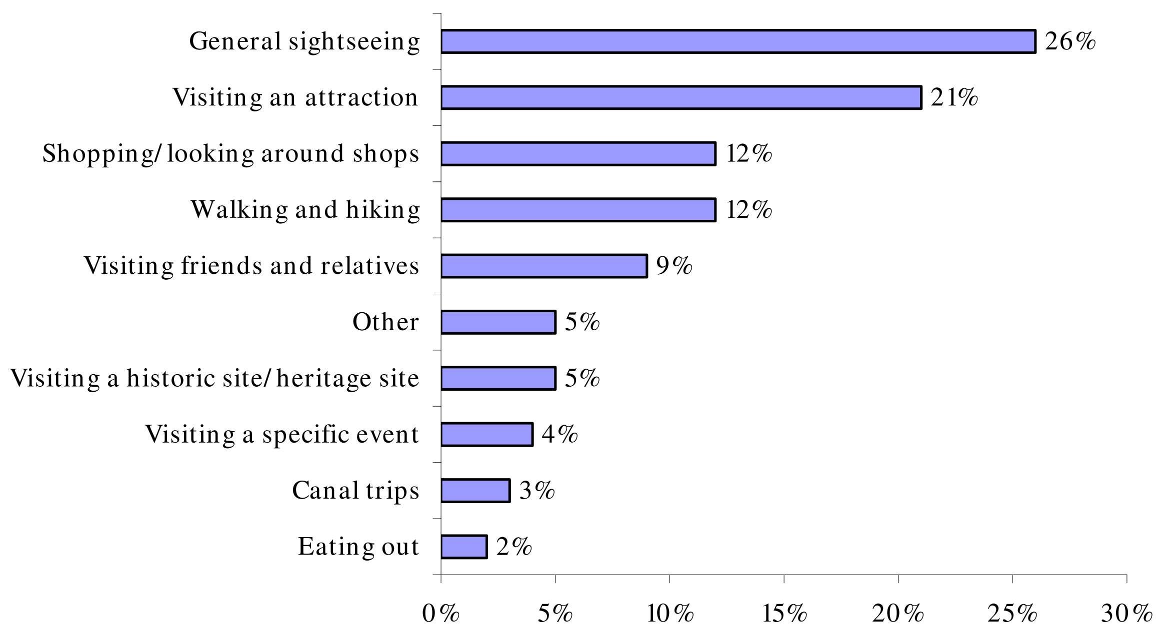
10.0 ACTIVITIES UNDERTAKEN BY VISITORS WHILST IN THE COUNTY

10.01 Activities Undertaken

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 county. Only one answer was given per party.

Figure 10.1 indicates that general sightseeing and visiting an attraction were the **primary** motives for respondents to visit Shropshire. *However, please note that the majority of interviews were undertaken at tourist attractions and town centres. Therefore, some bias may exist within results.*

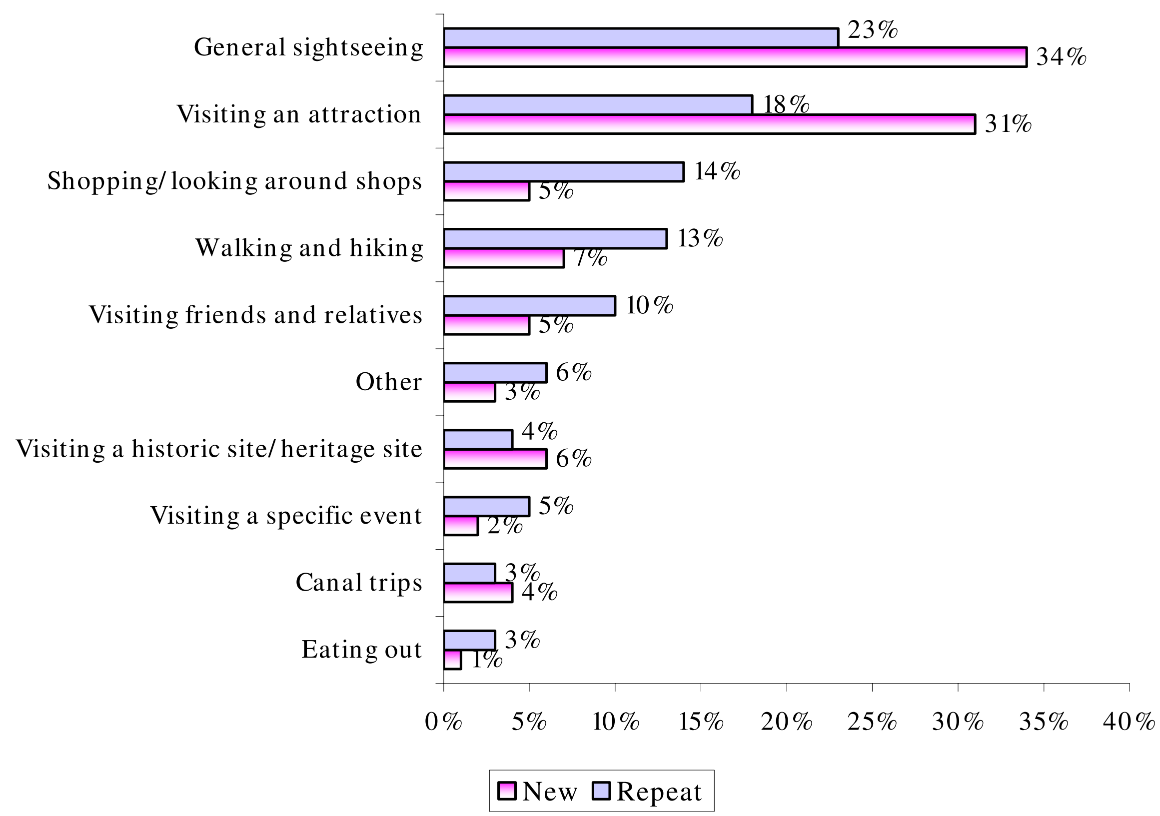
Figure 10.1: Main Activity Undertaken



Other primary reasons given included: Shopping/looking around shops and walking/hiking (12% respectively) and visiting friends and relatives (9%).

New visitors were more likely to state general sightseeing (34%) as their main activity, with a higher proportion of repeat visitors stating shopping/looking around shops as their main activity, 14% compared to 5% of new visitors.

Figure 10.2: Main Activity Undertaken by New/Repeat visitors



10.02 Main Activity Undertaken by Market Segment

Almost a quarter (24%) of day visitors were visiting an attraction as their main activity whilst on their visit to Shropshire. Overnight domestic visitors were most likely to state general sightseeing as their main activity (26%) as were overseas visitors (45%).

Table 10.1: Main Activities Undertaken by Type of Visitor *(2,573)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
General Sightseeing	26%	23%	32%	26%	45%
Visiting an attraction	21%	24%	29%	12%	6%
Shopping/looking around shops	12%	16%	10%	3%	7%
Walking and hiking	12%	13%	4%	12%	10%
Visiting friends and relatives	9%	6%	5%	19%	14%
Other	5%	5%	3%	6%	1%
Visiting a historic site/heritage centre	5%	4%	11%	4%	4%
Visiting a specific event	4%	5%	3%	3%	2%
Canal trips	3%	-	1%	12%	8%
Eating out	2%	3%	1%	2%	1%

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

Other activities included visiting a carnival, visiting a garden centre and visiting a market.

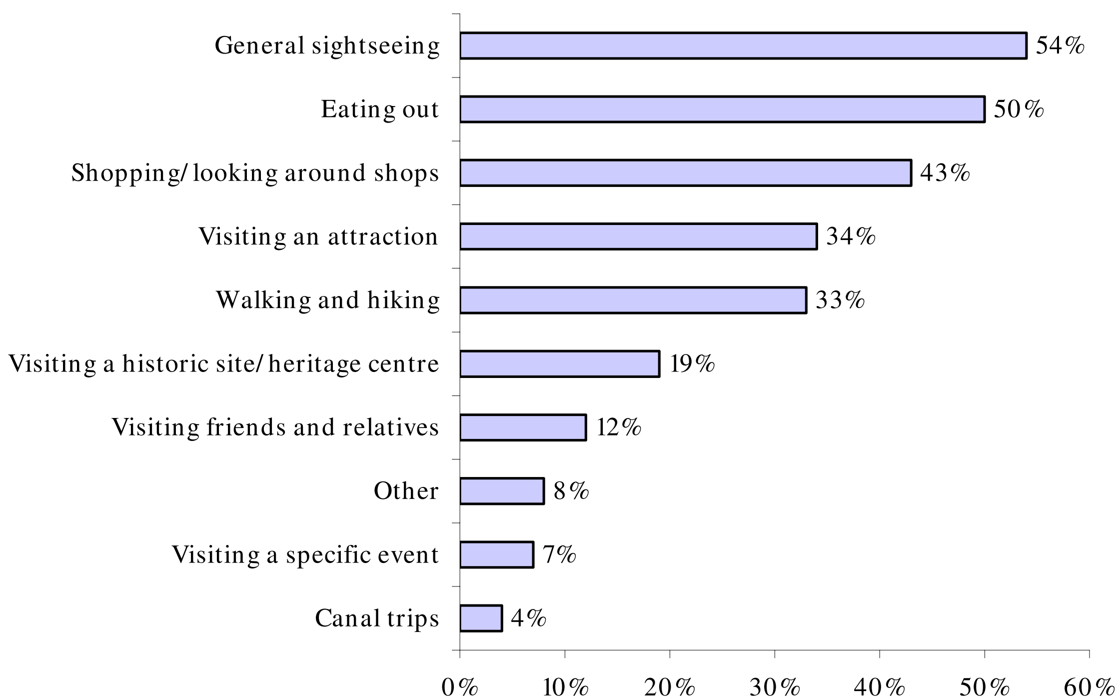
The top activities undertaken in Shropshire were spend related activities: these activities bring revenue into the area and are important for the local economy. Overnight and overseas visitors are more likely to carry out a wider range of spend related activities, thus they are of greater financial value.

10.03 Other Activities Undertaken in Shropshire

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 county. On this occasion more than one answer could be given – therefore results may add up to more than 100%.

Figure 21 indicates that general sightseeing (54%) and eating out (50%) were the most popular activities overall, undertaken by visitors in Shropshire. *However, again please note that the majority of interviews were undertaken at tourist attractions and town centres. Therefore, some bias may exist within results.*

Figure 10.3: All Activities Undertaken



Shopping/looking around shops was a popular activity with just over two fifths (43%) of respondents followed by visiting an attraction (34%).

11.0 PRE-TRIP SOURCES OF INFORMATION

11.01 Influenced Visit to Shropshire

Survey respondents were shown a show card, and asked if any of the following had influenced their decision to visit Shropshire.

- Previous visit
- Personal recommendation/word of mouth
- None
- Guide Books
- Internet
- Tourism leaflets/brochures
- Newspaper/magazine article
- Tour operator/travel agent
- Television/radio
- Newspaper/magazine advertisement
- Tourist Information Centre
- Britain in Bloom entry

Over half (53%) of all respondents stated a previous visit had encouraged them to return to Shropshire. An additional 18% stated a personal recommendation / word of mouth and 4% stated the internet had influenced their choice to visit.

80% of visitors had been influenced by some form of information when planning their trip, only 20% had not. A previous visit or personal recommendations were primary influences stated by visitors across all market segments.

Table 11.1: Influenced Visit to Shropshire – by Type of Visitor					*(2,485)*
	Total	**Day Visitors**	**Touring UK**	**Overnight UK**	**Overseas Visitors**
Previous Visit	53%	60%	38%	48%	20%
None	20%	20%	23%	18%	17%
Personal Recommendation / Word of mouth	18%	14%	19%	25%	40%
Internet	4%	2%	4%	7%	9%
Tourism leaflets / brochures/ visitor guides	4%	3%	7%	2%	4%
Guide books	3%	2%	6%	2%	14%
Tour operator/ travel agent	1%	0%	5%	1%	3%
Television/ radio	1%	0%	2%	1%	-
Newspaper/ Magazine article	1%	1%	0%	1%	2%

NB. Totals may add up to more than 100% as multiple responses were given.

Visitors who indicated that tourism leaflets/ brochures had influenced their visit (87 interviewees) were also asked where they had obtained this information:

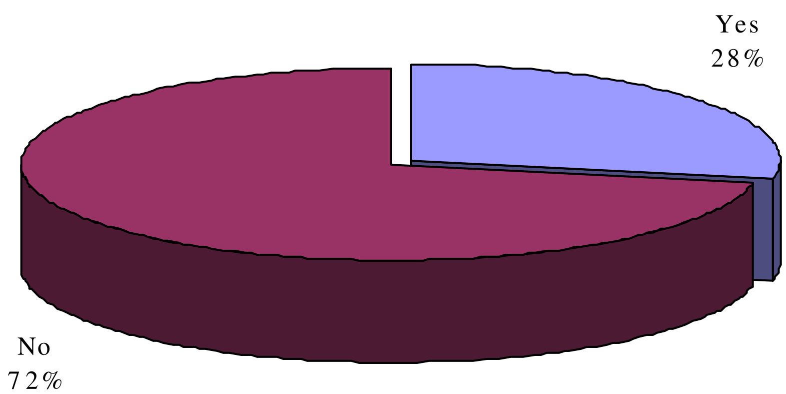
- 21% had gathered the leaflets/ brochures from an attraction or from a TIC at their place of residents.
- 14% had obtained the information from a TIC en route.
- 7% had received their leaflet through direct mail.

Other responses given as to where information had been obtained included: at accommodation, from a caravan / camp site, wildlife trust, and from the local shops.

11.02 Post Arrival Sources of Information

Respondents were asked if they had already used or intended to use any sources of information having arrived in Shropshire. Overall, almost three quarters (72%) of visitors indicated that they had not used, or did not intend to use information during their trip.

Figure 11.1: Sources of Information



Of those who did use/intend to use information during their trip, almost half (48%) indicated that they gathered the information from a Tourist Information Centre. An additional 21% respectively obtained information from information racks at attractions, or used walking guides/maps. A further 15% gleaned information from brochures found at accommodation.

The level and type of information used in Shropshire is shown in table 10.3 below.

Table 11.2: Information Use whilst in Shropshire – by Type of Visitor *(707)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Tourist Inforamtion Centre	48%	33%	47%	60%	65%
Information racks at attractions	21%	25%	20%	20%	16%
Walking guides / maps	21%	23%	11%	23%	24%
Brochures / racks at accommodation	15%	2%	23%	25%	13%
Other	14%	17%	18%	9%	16%
Tourist Information Boards	9%	6%	5%	13%	11%
WAP phone/ internet	7%	6%	3%	9%	8%
Tourist Information Points / kiosk	7%	6%	2%	9%	10%
Advice at accommodation	7%	1%	7%	12%	6%

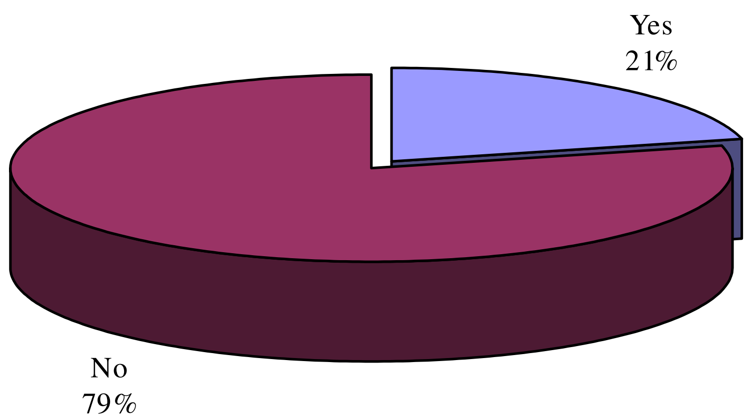
NB: Table totals 100% +/- as respondents provided more than one answer per question.

Almost two thirds (65%) of overseas visitors used a TIC in Shropshire, compared with only 33% of day visitors.

11.03 Environmental Affect

Respondents were asked if, when booking a holiday or choosing a day trip destination, they considered the impact their trip would have on the environment. Almost 8 out of 10 respondents stated no, they did not consider the impact when booking or choosing a day trip destination.

Figure 11.2: Environmental Impact



Of those who did consider the impact their trip would have on the environment, almost two fifths (38%) indicated that they felt locally sourced food and drink was an important consideration, followed by 29% who thought access to public transport was an important consideration. 'Other' was noted by 45% of visitors *(213 interviewees)*.

Table 11.3: Environmental Impact – by Type of Visitor *(520)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Locally sourced food and drink	38%	38%	22%	46%	35%
Access to public transport	29%	31%	22%	24%	38%
Energy efficient accommodation	18%	14%	18%	26%	22%
Other	45%	44%	63%	41%	35%

Of those respondents who stated other, these considerations included the following options.

Table 11.4: Other Considerations – by Type of Visitor *(520)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Clean and Tidy/don't drop litter	22%	22%	13%	27%	15%
Use of petrol	12%	14%	13%	7%	8%
Travel shorter distances/ travel as little as possible	11%	13%	13%	7%	-
Recycling	8%	5%	-	11%	38%
Don't fly/not flying	8%	7%	6%	11%	-
Walk here usually	6%	4%	16%	4%	8%
Use car sparingly	6%	5%	13%	5%	-
Carbon footprint	6%	5%	3%	5%	15%
Cycle	5%	4%	9%	5%	-
Generally aware	5%	5%	6%	5%	-
Lower emissions car	5%	3%	3%	9%	8%

Just over one fifth (22%) of visitors felt not dropping litter was an important consideration, followed by 12% who thought the use of petrol was important. Almost two fifths (38%) of overseas visitors felt that recycling was important, compared with only 5% of day visitors.

12.0 MOVEMENT AROUND THE AREA

12.01 Areas within Shropshire visited or intend to visit this trip

Visitors were shown a list of towns / villages within Shropshire and asked to advise which they had visited or intended to visit on this trip. Only 19% of all visitors indicated they had not visited/ intended to visit any of the listed town / villages within Shropshire on this trip.

Table 12.1: Towns / Villages visited this trip – by Type of Visitor *(2,591)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
None	19%	26%	10%	6%	5%
Shrewsbury	28%	**24%**	**38%**	**32%**	**48%**
Telford	19%	**18%**	15%	23%	24%
Ironbridge	18%	13%	**27%**	**29%**	**32%**
Bridgnorth	17%	17%	26%	14%	22%
Ludlow	13%	10%	17%	21%	28%
Oswestry	13%	13%	17%	12%	15%
Ellesmere	12%	10%	7%	20%	11%
Church Stretton	11%	9%	11%	17%	13%
Whitchurch	10%	8%	6%	17%	13%
Craven Arms	8%	6%	11%	14%	14%
Market Drayton	7%	7%	2%	12%	10%
Other	6%	5%	11%	7%	6%
Bishops Castle	6%	5%	7%	11%	4%
Clun	5%	3%	5%	10%	4%
Wem	4%	4%	3%	7%	2%
Cleobury Mortimer	2%	2%	2%	2%	1%
Broseley	2%	2%	1%	2%	-

Table 12.1 illustrates, that the most popular town / villages visited by respondents during this trip are; Shrewsbury, Telford, Ironbridge, Bridgnorth and Ludlow (28%, 19%, 18%, 17% and 13% respectively). Unsurprisingly, the touring segments are most likely to visit another town / village and the day visitors are least likely to.

13.0 KNOWLEDGE OF/VISITS TO ATTRACTIONS AND RATINGS OF SERVICES

13.01 Local awareness and visitation

Visitors who indicated they had visited an attraction as an activity were asked to indicate which attractions they had or intended to visit.

All results exclude visitors interviewed at the named attraction, to reduce bias from their current trip. The results illustrate the importance of advance marketing, public relations and marketing within Shropshire in order to raise the awareness and visitation to the attractions. Visitors were also asked to rate the attractions they had visited on this occasion. A scale of 1 = very poor and 5 = very good is used to indicate their satisfaction levels.

Table 13.1: Knowledge and Visits to Attractions

	Have visited this trip	Will visit on this trip	Satisfaction Rating
None	61%	74%	-
Blists Hill Victorian Town	7%	5%	**4.7**
Ironbridge Toll House	6%	6%	4.3
Cardingmill Valley	5%	2%	**4.7**
RAF Museum (Cosford)	5%	2%	**4.8**
Hawkstone Park Follies	4%	2%	4.5
Jackfield Tile Museum	4%	1%	4.3
Stokesay Castle	4%	2%	**4.6**
Weston Park	4%	1%	4.3
Park Hall Farm	4%	0%	4.4
Severn Valley Railway	4%	3%	**4.6**
Telford Town Park	3%	2%	4.3
Shropshire Hill Discovery Centre	3%	1%	4.2
Whittington Castle	3%	1%	4.2
Hoo Farm	3%	3%	4.4
Wonderland	3%	2%	4.3
Enginuity	3%	2%	4.4
Telford Steam Railway	1%	1%	*3.6*
Hodnet Hall	1%	0%	4.3

All attractions scored highly with visitors, which is encouraging. The top 5 ranked attractions have been highlighted on the table. (However, please note that bases for knowledge of each attraction do vary.)

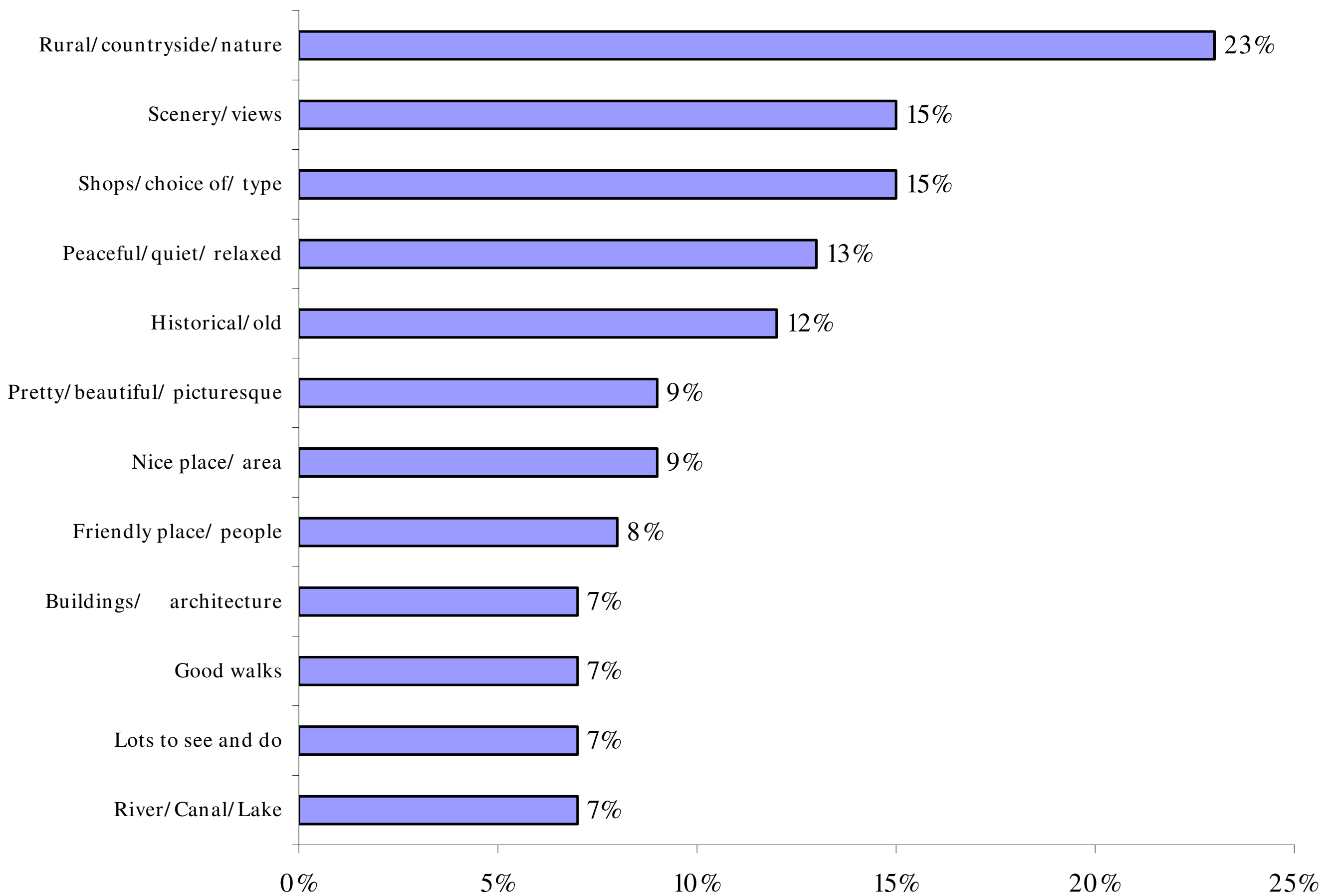
14.0 Satisfaction Levels of Visitors to Shropshire

14.01 What Visitors like about Shropshire

Respondents were asked what it was they particularly liked about Shropshire. No prompting or "show cards" were used by interviewers for this question, with respondents able to give more than one response.

Across the County, comments were made by 98% of visitors. The following analysis is of the responses made as a percentage of the total visitors' sample. Each 'like' indicates a grouping together of responses/phrases.

Figure 14.1: Likes about Shropshire



Across all categories, the countryside/rural/nature featured heavily as did the scenery / views.

- Day visitors stated **rural/countryside/nature (19%), shops/choice of (17%)** and **scenery/views (14%)** as the top three elements of the county.

- Touring UK visitors stated that they liked the **rural/countryside/nature (24%); historical/old (17%)** and thought the area had **good scenery/views (15%)**

- Overnight UK visitors liked the **rural/countryside/nature (32%), the scenery/views (21%)** and that the area was **peaceful/quiet/relaxed.**

- Overseas visitors liked the **historical/old (32%)** aspect of the county, the **rural/countryside/nature (25%),** and the **buildings/architecture (23%)** in the county.

Table 14.1: Likes about Shropshire – by Type of Visitor *(2,568)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Rural/Countryside/Nature	23%	**19%**	**24%**	**32%**	**25%**
Scenery/Views	15%	**14%**	**15%**	**21%**	15%
Shops/Choice of/type of	15%	**17%**	13%	9%	12%
Peaceful/quiet/relaxed	13%	12%	10%	**19%**	7%
Historical / old	12%	9%	**17%**	13%	**32%**
Pretty/beautiful/picturesque	9%	8%	9%	12%	11%
Nice place/area	9%	9%	10%	7%	7%
Friendly place/people	8%	6%	9%	11%	17%
Buildings/architecture	7%	6%	11%	7%	**23%**
Good Walks	7%	9%	2%	6%	1%
Lots to see and do	7%	7%	8%	6%	3%
River/canal/lake	7%	6%	6%	9%	11%
Good for kids/families	6%	8%	2%	2%	-

14.02 What spoilt the visit to the County?

All visitors were asked what, if anything had spoilt their visit to Shropshire.

Overall, 84% of visitors responded but 77% indicated that nothing had spoilt their visit to Shropshire.

Of the comments that were made, 7% related to the weather and 2% stated that the lack of parking / cost of parking. 2% of visitors also stated that roadworks / traffic had spoilt their visit to the area.

Table 14.2: Dislikes about Shropshire – by Type of Visitor *(2,199)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
No/None/Nothing	77%	78%	74%	73%	77%
Weather	7%	6%	10%	11%	9%
Lack of Parking/Cost of parking	2%	3%	2%	1%	-
Roadworks/traffic	2%	1%	2%	3%	3%
Lack of toilet facilities/poor toilets	1%	1%	-	0%	1%
Rubbish/litter/dog mess	1%	1%	-	1%	-
Lack of / poor signage	1%	1%	2%	1%	1%

Similar comments were received across all the types of visitor categories.

Public expectations are rising all the time and any short comings in the way Shropshire manages and welcomes the visitors are reflected in the level of visitor satisfaction, which in turn influences future visits, length of stay and recommendations to potential visitors. Therefore, the visitor scoring of facilities within individual towns and issues that spoiled a respondents' visit may help inform future tourism development initiatives.

In the case of new visitors, scoring could be influenced by preconceived ideas about an area; this may result in low scores if a destination does not live up to expectations.

15.0 EXPENDITURE

15.01 Visitor spending in the local economy

Visitors were asked to estimate how much they and their party were likely to spend during the whole period of their stay in Shropshire. This included expenditure incurred on behalf of others, i.e. friends/relatives, business colleagues. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as estimates. Studies using the diary method of keeping account of spending have shown that visitors' own estimates as used in Shropshire 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 for food
- Shopping other goods
- 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 15.1 shows the breakdown of all visitor segments' expenditure by sector:

Table 15.1: Expenditure Breakdown – All Visitors

	Total
Accommodation	31%
Eating/drinking out	29%
Shopping	24%
Entertainment	8%
Transport / Fuel	8%
Other	1%

The average spend for all visitors to Shropshire is £101.19 per party per trip. With an average party size of 2.9, the expenditure rate per person is £34.89 per day.

Visitor spending in Shropshire is split between accommodation (31%), eating and drinking (29%) and shopping (24%).

15.02 Day Visitors

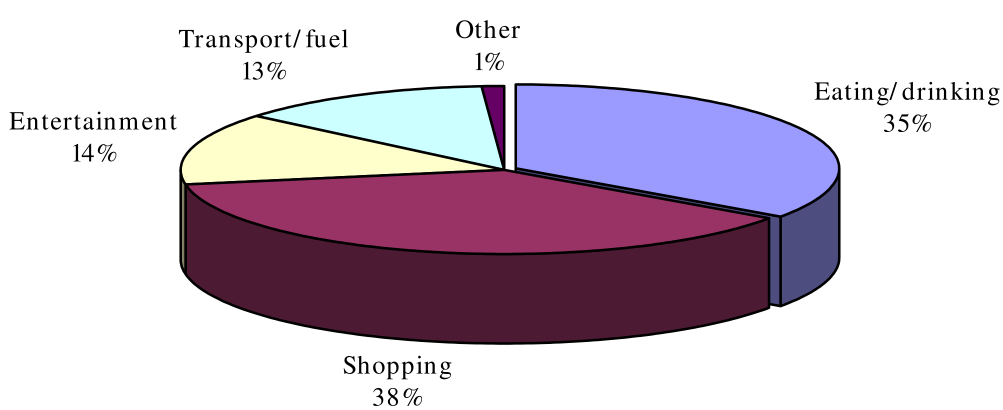
On average, a party of day visitors in Shropshire spent £39.49. With an average day visiting party size of 2.9 people, the average expenditure rate per person is £13.62 during the day.

Table 15.2: Expenditure Breakdown – Day Visitors *(1,707)*

	Total
Eating/drinking out	35%
Shopping	38%
Entertainment	14%
Transport / Fuel	13%
Other	1%

On average, the Town Leisure Day Visit spend for the West Midlands Region is £26.40 per person and the average Countryside Leisure Day Visit expenditure rate is £12.52 per person.

Figure 15.1 - Expenditure - Day Visitors



15.03 UK Touring Visitors

An approximate level of spend can be seen amongst the touring party sample with an average party size of 2.6 people. A total of £56.23 was spent per party, or £21.63 per head per trip. *These figures include those people visiting Shropshire as part of a coach trip or tour.*

This is usually a higher figure than for day visitors as this touring segment comprises visitors making a day trip into the county from an alternative place of overnight stay outside the county, on a holiday/ leisure/ break with friends and relations, etc.

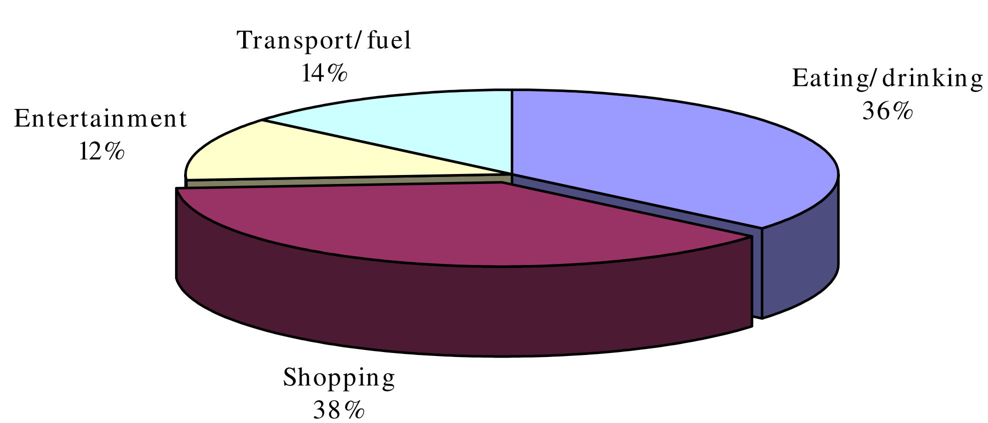
Touring visitors have a different spending breakdown to day visitors, with more of the touring spend going on eating and drinking and travel and transport, and sometimes a lower proportion spent on shopping, although in the case of Shropshire this is on a par with day visitors. The distribution of touring visitors' expenditure is as follows.

Table 15.3: Expenditure Breakdown – Touring UK *(282)*

	Total
Eating/ drinking out	36%
Shopping	38%
Entertainment	12%
Transport / Fuel	14%
Other	0

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

Figure 15.2 - Expenditure - UK Touring Visitors



15.04 Overnight UK Visitors

Domestic staying visitors are those people who are on their holiday or short break and staying within the Shropshire area.

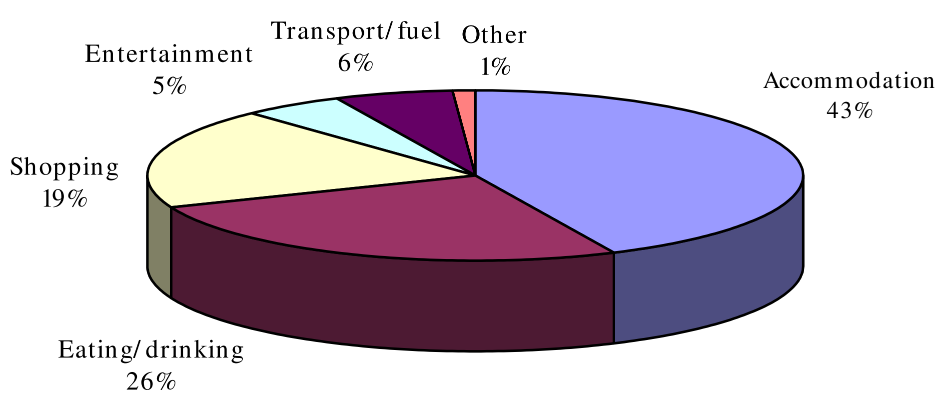
An approximate level of spend can be seen amongst the overnight party sample, staying for less than 2 months, based on all visitors using either commercial accommodation or staying with friends and relatives. This equates to an average party size of 2.9 people. A total of £287.42 was spent per party or £99.11 per head per overnight trip. The spend per person per night is £23.60.

When excluding the visiting friends and relatives market, the spend increases to £348.88 per party. With an average party size of 3.0 this gives an average spend per head per overnight trip of £116.29. With an average length of stay of 4.5, this equates to £25.84 per person per night, amongst those stopping in some form of commercial accommodation.

Table 15.4: Expenditure Breakdown – UK Overnight *(537)*

	Total
Accommodation	43%
Eating/drinking out	26%
Shopping	19%
Entertainment	5%
Transport / Fuel	6%
Other	1%

Figure 15.3 - Expenditure - Overnight UK Visitors



15.05 Overseas Touring Visitors

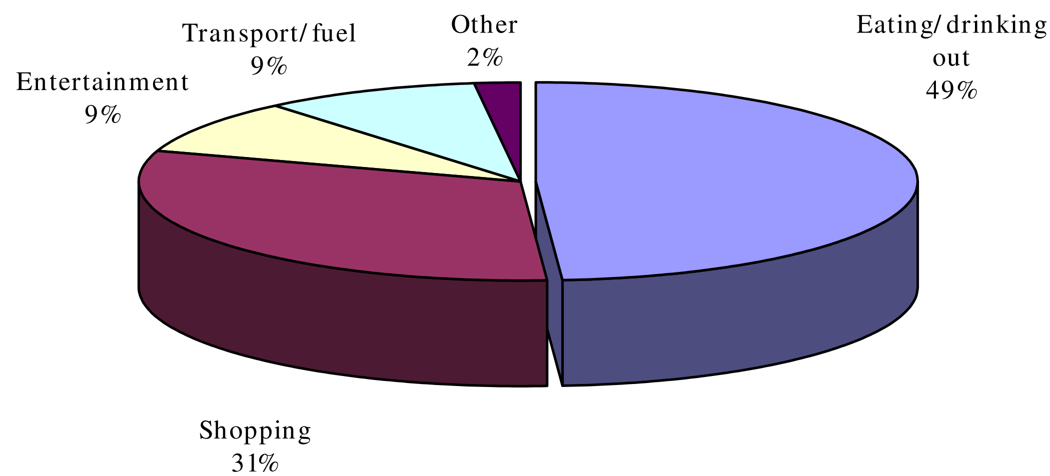
A total of 44 overseas visitors were touring visitors to the county. As with domestic touring visitors, the overseas touring visitor will be coming to Shropshire for a day out but staying elsewhere outside of the county on their holiday or short break.

An approximate level of spend can be seen amongst the overseas touring party sample; with an average party size of 3.0 people and a total of £65.55 spend per party, spend per head per trip stands at £21.85.

Table 15.5: Expenditure Breakdown – Overseas Touring ***(44)***

	Total
Eating/drinking out	49%
Shopping	31%
Entertainment	9%
Transport / Fuel	9%
Other	2%

Figure 15.4: Expenditure - Overseas Touring Visitors



15.06 Overnight Overseas Visitors

A total of 57 overnight overseas visitors, including those staying with friends and family, provided details of how much they spent in Shropshire.

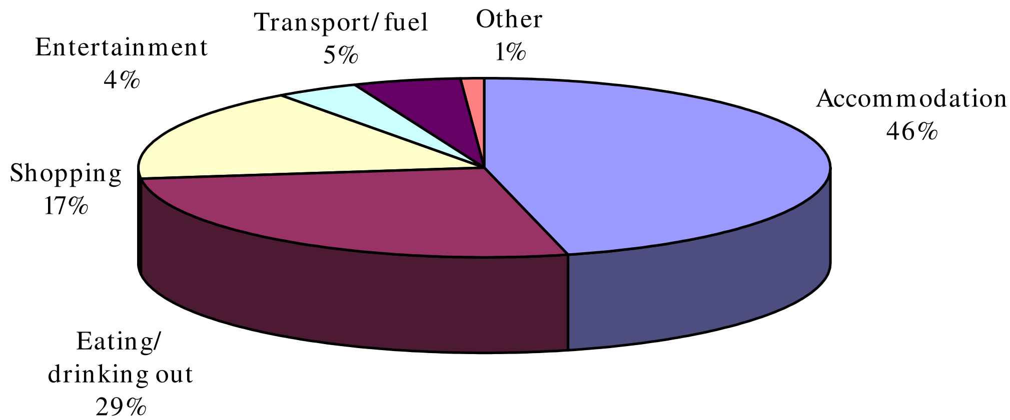
The spend estimated for all overnight overseas visitors is calculated to be £350.60 per party. With an average party size of 3.0 people, £116.87 was spent per head per trip by overseas visitors.

As with domestic staying visitors, when excluding the visiting friends and relatives market, the spend increases to £466.63 per party. With an average party size of 3.3, this gives an average spend per head per overnight trip of £141.40. With an average length of stay of 5.2 nights, spend totalled £27.19 per person per night, amongst those stopping in some form of commercial accommodation.

Table 15.6: Expenditure Breakdown – Overnight Overseas Visitors *(57)*

	Total
Accommodation	46%
Eating/drinking out	27%
Shopping	17%
Entertainment	4%
Transport / Fuel	5%
Other	1%

Figure 15.5 - Expenditure - Overnight Overseas Visitors



15.07 Expenditure per Market Segment

Thus, in summary, the differing levels of spend per market segment are:

Table 15.4: Expenditure by Market Segments	
Total Spend All Visitors	£34.89 Per Person Per Day
UK Day Visitor	£13.62 Per Person Per Day
UK Touring (staying outside of the county)	£21.63 Per Person Per Trip
UK Overnight - ALL	£99.11 Per Person Per Trip £23.60 Per Person Per Night
UK Overnight – Commercial Accommodation	£116.29 Per Person Per Trip £25.84 Per Person Per Night
UK Overnight - VFR	£37.81 Per Person Per Trip £10.50 Per Person Per Night
UK Overnight – Serviced Accommodation (hotels B&B etc)	£134.29 Per Person Per Trip £49.74 Per Person Per Night
UK Overnight – Self-Catering (camping/caravan/cottages etc)	£107.85 Per Person Per Trip £19.61 Per Person Per Night
Overseas Touring (staying outside of the county)	£21.85 Per Person Per Day
Overseas Overnight - ALL	£116.87 Per Person Per Trip £20.15 Per Person Per Night
Overseas Overnight (Commercial Accommodation)	£141.40 Per Person Per Trip £27.19 Per Person Per Night
Overseas Overnight - VFR	£50.29 Per Person Per Trip £6.37 Per Person Per Night
Overseas Overnight – Self-Catering (camping/caravan/cottages etc)	£168.25 Per Person Per Trip £28.04 Per Person Per Night