the research solution

SHROPSHIRE HILLS
AREA OF OUTSTANDING NATURAL BEAUTY
VISITOR SURVEY 2007

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FINAL REPORT

April 2008

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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 Hills Area of Outstanding Natural Beauty (AONB). Interviewing was carried out at many visitor destinations across the area, including: Cardingmill Valley (South Shropshire), The Bridges (South Shropshire), Church Stretton Town Centre (South Shropshire), the Bog Centre (South Shropshire) and the Wrekin (Telford & Wrekin).

The AONB Visitor Survey was carried out over the course of approximately 29 days from June to September 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

More than half (62%) of visitors to the Shropshire Hills AONB, at all interview locations, are on a day visit. 6% are classified as being in the touring group and those staying overnight accounted for 32% of visitors to the AONB. Of all visitors, only 2% were visiting from overseas.

The Heart of England Tourism Region is the leading provider of day visitors to the AONB. More than four fifths (84%) of all day visitors were from within the Region. 17% of touring UK visitors originated from South Wales. 10% of overnight UK visitors were from the West Midlands Metropolitan Area. In the AONB, Canada (33%), USA and Ireland (17% respectively) are the main suppliers of overseas visitors.

Party composition

A total of 317 parties of visitors were surveyed. Almost all (306) provided demographic data on their group. The average (mean) number of people per group was approximately 2.9 giving a total of at least 919 people included in the survey sample. The most dominant groups interviewed were adult couples (38%) and those with their family (25%). A greater proportion of groups with children can be seen amongst the day visitor and touring sectors, where 31% and 39% of groups respectively contained children. The lowest proportion of children is in the overseas visitor market none of which contained children in their party.

Age Profile of Visitors

The largest age group recorded was the group aged 45 to 54 years old (19%). The second largest groups were adults aged 25 to 44 and 55 to 64 years old (17% each).

Socio-economic groups

Across the whole of the AONB, almost three quarters (74%) of visitors are in the ABC1 groups. This is above the county figure of 66%.

New/Repeat Visitors

More than four fifths (83%) of respondents are repeat visitors. The balance suggests that the AONB 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 67% of all visitors had previously been to the area as a day visitor and 15% had previously stayed overnight. 18% of repeat visitors to the AONB 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 the AONB before, almost 9 out of 10 (87%) 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, over half (53%) had previously been on an overnight visit.

Number of times visited in last five years

Day visitors were the most frequent visitors to the AONB with almost three fifths (55%) returning to the area more than ten times in the past five years. Almost half (46%) of touring UK visitors had visited the area at least three times during the last five years.

Length of Stay

Visitors were asked how long their whole trip was and how long they envisaged staying overnight in AONB. On average, overnight UK visitors and overnight overseas visitors spent 4.5 nights in the area.

The average length of stay for both day and touring visitors in the area was approximately **3 hours 54 minutes;** this included all visitors at all locations and attractions. For UK day visitors the average stay was **3 hours 53 minutes**. Domestic touring visitors to the AONB stayed for a slightly greater amount of time, **4 hours and 8 minutes**.

Accommodation

The non-serviced market (including self catering) in the AONB accounts for 38% of visitors choosing this form of accommodation on their trip, slightly lower than the county figure of 47%. This represents the most popular accommodation for visitors to the area. Just over a quarter (26%) of overnight visitors to the AONB stayed in serviced accommodation (hotels, guesthouses and B&Bs).

17% of respondents were staying with friends or relatives (VFR) in the area. 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 (46%) had pre-booked directly with their establishment (by phone), while a fifth (20%) had emailed the establishment directly. 11% had booked via the internet.

Mode of Transport

More than 9 out of 10 (94%) visitors arrived in the AONB by car which is above the county average (86%). Only 5% of visitors to the AONB used public transport as their main mode of transport to the area.

Activities Undertaken in the AONB

Visitors were asked to indicate all the activities that they had been involved in whilst in the AONB. The most popular activities undertaken were general sightseeing (54%), eating out (48%) and walking/hiking (80%). Visitors were also asked to state the main activity they had undertaken or planned to undertake whilst in the AONB. Walking/hiking and general sightseeing (57% and 18% respectively) were the primary motives for interviewees to visit the AONB. The majority of interviews were conducted at walking destinations, tourist attractions and town centres and, therefore, some bias may exist within the results.

New visitors were more likely to state general sightseeing (26%) as their main activity, compared with repeat visitors 16%.

Sources of information

Almost two thirds (65%) of all respondents stated a previous visit had encouraged them to return to the AONB. An additional 13% stated a personal recommendation / word of mouth and 3% stated that leaflets/brochures had influenced their choice to visit.

88% of visitors had been influenced by some form of information when planning their trip, only 12% had not. A previous visit or personal recommendations were primary influences stated by visitors across all market segments.

Post Arrival Sources of Information

Overall, just under half (43%) of visitors indicated that they had used, or did intend to use information during their trip.

Of those who did use/intend to use information during their trip, 37% 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. Just over two thirds (70%) respondents stated no, they did not consider the impact when booking or choosing a day trip destination.

Areas within Shropshire visited or intend to visit this trip

The most popular towns / villages visited by respondents during this trip are; Church Stretton, Ludlow, Shrewsbury, Clun and Telford (41%, 17%, 16%, 16% and 15% respectively). Unsurprisingly, the touring/overnight/overseas segments are most likely to visit another town / village and the day visitors are least likely to.

Local awareness and visitation

Most attractions received very good ratings with all of the mean scores being over 3.5 and the scores for the majority of the attractions being 4.5 or above.

Comments about the AONB

Most visitors responded to this question. Across all categories, the rural / countryside aspect (37%) to the AONB, the scenery / views (34%) and the peaceful / quiet / relaxed atmosphere (21%) featured heavily.

Most visitors responded with 69% indicating that nothing had spoilt their visit to the AONB. Of the comments that were made, 5% related to the weather and 2% stated that poor quality toilets/lack of toilets and rubbish/litter/dog mess had spoilt their trip.

Visitor Expenditure

The main expenditure of visitors to the AONB is accommodation (37%), followed by eating / drinking out (32%) and shopping (17%).

- On average, a party of day visitors in the AONB spent £19.67. With an average day visiting party size of 3.0 people, the average expenditure rate per person is £6.56 during the day.
- An approximate level of spend can be seen amongst the touring party sample with an average party size of 3.3 people. A total of £68.76 was spent per party, or £20.84 per head per trip.
- The average expenditure for UK overnight visitors was £283.19 per party; with a mean party size of 2.7 people, the average spend per person per trip was £104.88.
- An approximate level of spend can be seen amongst the overseas party sample; with an average party size of 2.0 people and a total of £166.67 spend per party, spend per head per trip stands at £83.33.

1.0 INTRODUCTION, BRIEF AND METHODOLOGY

1.01 Introduction

The Research Solution was commissioned by Shropshire Tourism Research Unit and the Shropshire Hills Area of Outstanding Natural Beauty (AONB) in 2007 to undertake a major market research appraisal of the visitor profile and views of those visiting the AONB area. Interviewing was carried out at several visitor destinations across the area, including Cardingmill Valley (South Shropshire), The Bridges (South Shropshire), Church Stretton Town Centre (South Shropshire), the Bog Centre (South Shropshire) and the Wrekin (Telford & Wrekin). At least 20 days of surveying was carried out from June to September 2007, during weekdays and weekends, term time and holidays.

The visitor survey provides important data to assist local authorities and other bodies 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 the AONB.
- 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 the AONB.
- 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 the AONB.
- To identify the varying levels of spend in the AONB 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 the Shropshire Hills AONB 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 the AONB.

1.04 Survey Methodology

The Shropshire Hills' AONB Visitor Survey was carried out over the course of over 20 days from June to September 2007. As such, the survey period covered the peak, shoulder and off peak months, with interviewing taking place both at weekends and weekdays.

317 people were interviewed as identified in Table 1.1. Surveying was undertaken at various locations within the Shropshire Hills AONB.

The survey was conducted on a simple random basis. Interviewers asked the 'next person to pass' if they would participate. Residents of the relevant district (either South Shropshire or Telford & Wrekin) 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% and a *dash* (-) indicates no value

Table 1.1: Interview Locations		*(317)*
	Number	***%***
The Wrekin (Telford & Wrekin)	98	31%
Cardingmill Valley (South Shropshire)	93	29%
The Bridges (South Shropshire)	50	16%
Clun Castle (South Shropshire)	48	15%
Bog Centre (South Shropshire)	16	5%
Church Stretton Town Centre (South Shropshire)	12	4%

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.

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 area:

- ***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 the AONB or surrounding area. For example a family on holiday in Worcestershire may come to the Shropshire AONB for a day* ***or*** *someone stopping off in the AONB en-route from home to another holiday destination.*
- ***Overnight Visitors****: Those visitors who spend one or more nights in the Shropshire Hills AONB or surrounding area. This sector of the market includes those staying with family and friends as well as those using commercial accommodation. It should be noted that overnight visitors may be staying just outside the AONB but within the relevant Shropshire district. For example, visitors interviewed at Cardingmill Valley classified as overnight visitors may have been staying outside the AONB but still within South Shropshire.*

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.

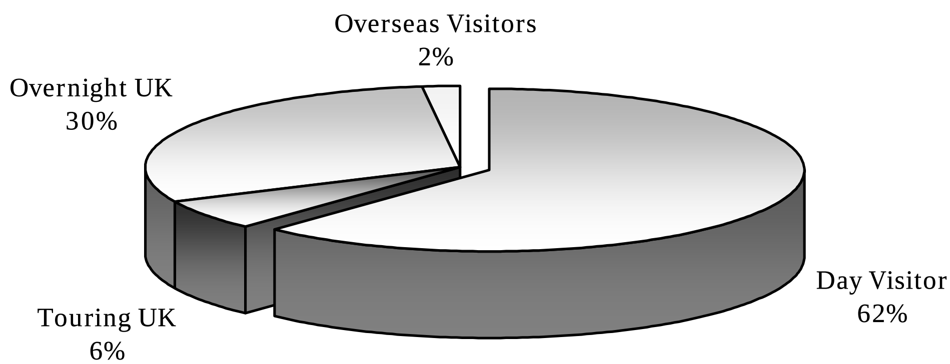
Over half (62%) of visitors to the Shropshire Hills AONB, at all interview locations, are **on a day visit**. Unsurprisingly, all of these day visitors are domestic visitors on a day trip from home.

Of the domestic and overseas visitors surveyed across the AONB, **6% 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 31% of visitors to the AONB.**

The complex structure of the AONB'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 2% 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 the AONB's visitor market into context, it is worth comparing it to other districts 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 District *(317)*

	Day Visitor	Touring UK	Overnight UK	Overseas
AONB	***62%***	***6%***	***31%***	***2%***
South Shropshire District 2007	**52%**	**9%**	**35%**	**4%**
Shropshire County 2007	**65%**	**11%**	**20%**	**4%**
Wyre Forest 2005	68%	11%	19%	2%
Wychavon 2005	51%	22%	22%	5%

The AONB market has a similar reliance on day visitors as Shropshire as a whole, but welcomes fewer touring visitors and overseas visitors. More visitors stay overnight in the AONB (or local area) than the county average (31% against 20%). South Shropshire district is similar to the Heart of England region overall. The proportion of day visitors recorded is on a par with Wychavon, but below the County figure of 65%. In South Shropshire, the overnight market is above the proportions recorded in the county, the Wyre Forest and Wychavon. The touring UK visitor proportions are slightly lower than the county and the Wyre Forest figures and significantly below those recorded in Wychavon (9% compared with 22%).

2.02 Visitor Type by Location

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

Those locations with the vast majority of day visitors include; The Wrekin (78%), Cardingmill Valley (67%) and The Bridges, (58%). Almost two fifths (38%) of visitors to the Bog Centre were touring UK visitors (albeit from a small sample). Almost three fifths (58%) of visitors to Church Stretton Town Centre were overnight UK visitors whilst more than half of visitors to Clun Castle were also staying overnight.

Table 2.2: Type of Visitor at a Sample of Survey Locations *(317)*

	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
The Wrekin	78%	2%	18%	2%
Cardingmill Valley	67%	2%	30%	1%
The Bridges	58%	4%	36%	2%
Clun Castle	33%	13%	52%	2%
Bog Centre	50%	38%	13%	-
Church Stretton Town Centre	42%	-	58%	-

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. Overall, the Heart of England Region is the leading provider of day visitors to the Shropshire Hills Area of Outstanding Natural Beauty. More than four-fifths (84%) of all day visitors were from within the Heart of England Region.

Figure 3.1– Origin of Day Visitors Regional Map

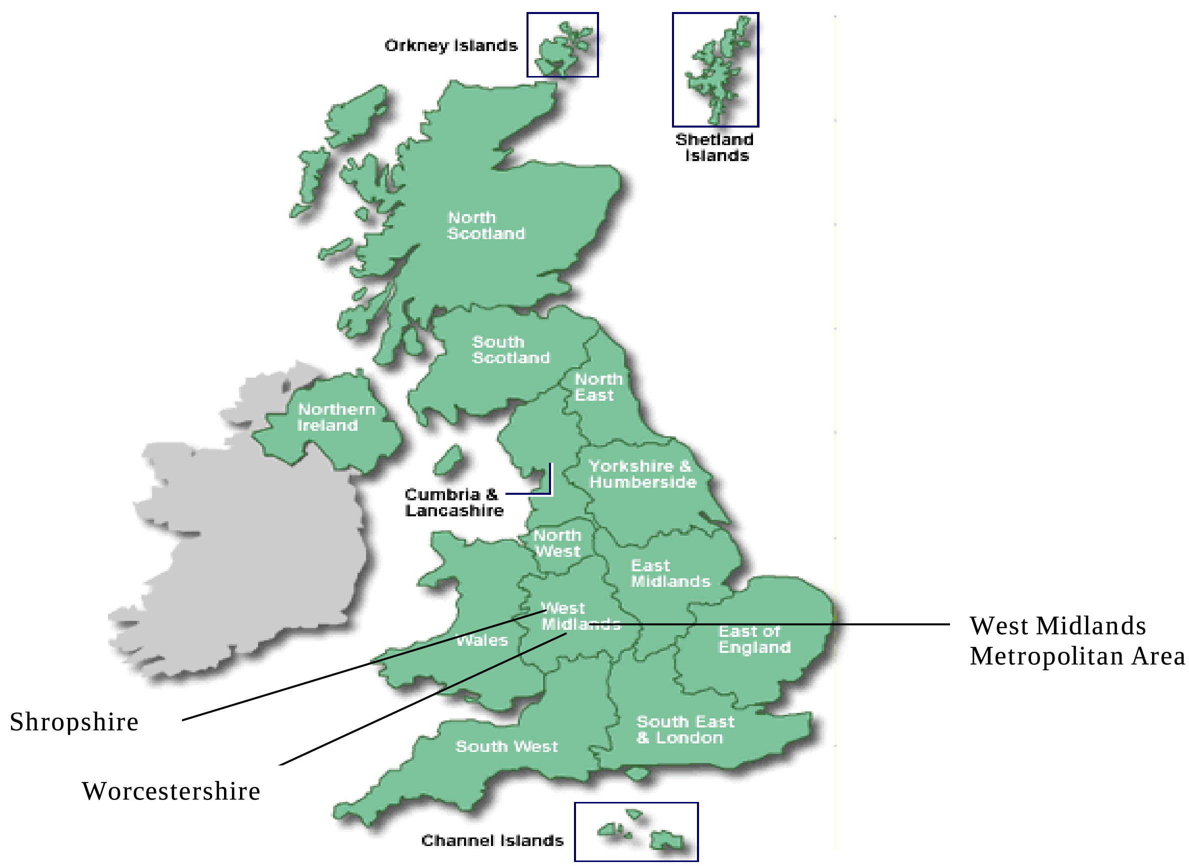


Table 3.1 below shows that there are distinct variations as to the performance of the counties concerned. Future promotional campaigns can take account of such information in order to target the existing and potential visitor markets in a more efficient manner.

Table 3.1: "Top Six" Origin of Day Visitors	***(196)***
	Percentage
Shropshire	56%
West Midlands	20%
Cheshire	6%
Staffordshire	5%
Worcestershire	3%
Powys	3%

*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 the AONB. After the 'six' counties, a further 7 destinations generated one or more day visitors to the AONB.

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 for those staying overnight, the volume of day visitors tends to provide the largest tourism spend across the Heart of England 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 Shropshire in order to sustain the existing level of visitor movement and subsequent expenditure. The Cheshire, Staffordshire, Worcestershire and Powys markets could be further developed.

3.03 Touring Visitors

6% of all visitors to the Shropshire AONB 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 the AONB, but are not staying overnight in the AONB itself.

Table 3.2: "Top Three" Origin of UK Touring Visitors *(18)*

	Percentage
South Wales	17%
Warwickshire	11%
Shropshire	11%

Table 3.2 shows that the areas of origination of UK touring visitors are very diverse, with the highest percentage of visitors travelling from South Wales.

Only three counties supplied two or more touring visitors interviewed within the AONB (albeit from a small sample), with a further 11 destinations generating one UK touring visitor.

3.04 Overnight Visitors (UK)

31% of all visitors surveyed were UK residents staying overnight in the AONB (or surrounding area). 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 the AONB (or surrounding area). This shows the origin of such visitors by county/area.

Table 3.3: "Top Six" Origin of UK Overnight Visitors *(97)*

	Percentage
West Midlands	10%
Lancashire	6%
Hampshire	5%
London/Middlesex	5%
Bath/Bristol	5%
Essex	5%

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 (10%).

3.05 Overseas Visitors

A total of 6 visitors from at least three different countries were interviewed, making up 2% of all visitors. Overseas visitors are a market that can have a significant economic impact for the AONB as a whole but appear to account for only a small proportion of overall vsiitors. 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 the Shropshire Hills AONB.

Table 3.4: "Top Three" Origin of Overseas Visitors *(6)*

	Percentage
Canada	33%
USA	17%
Ireland	17%
Unspecified	33%

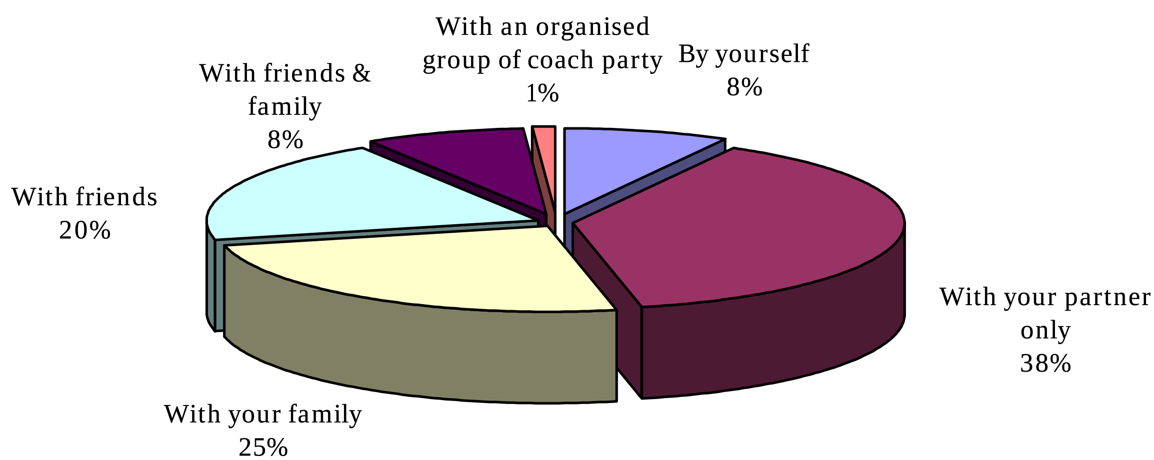
In the AONB, the main origins of overseas visitors are from Canada (33%), the USA (17%) and Ireland (17%).

4.0 DEMOGRAPHIC PROFILE OF VISITORS

4.01 Party Composition

A total of 317 parties of visitors were surveyed. Almost all (306) provided demographic data on their group. The average (mean) number of people per group was approximately 2.9 giving a total of at least 919 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 (38%) and those with their family (25%). However please note that numbers may be influenced by interview location i.e. certain attractions attract certain markets.

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 *(306)*

	AONB Total	*Shropshire Total*	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
By yourself	**8%**	*7%*	8%	11%	8%	17%
With your partner only	**38%**	*40%*	34%	33%	49%	17%
With your family	**25%**	*37%*	28%	28%	19%	-
With friends	**20%**	*9%*	22%	17%	13%	67%
With friends & family	**8%**	*5%*	7%	11%	10%	-
With an organised group or coach party	**1%**	*1%*	1%	-	1%	-

A slightly lower proportion of visitors to the AONB travelled with their partner only compared to visitors to the county (38% and 40% respectively). Across all market segments, the most popular party composition was adult couples, with the exception of overseas visitors, who were most commonly with friends *(note: very small sample)*.

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 the AONB 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.

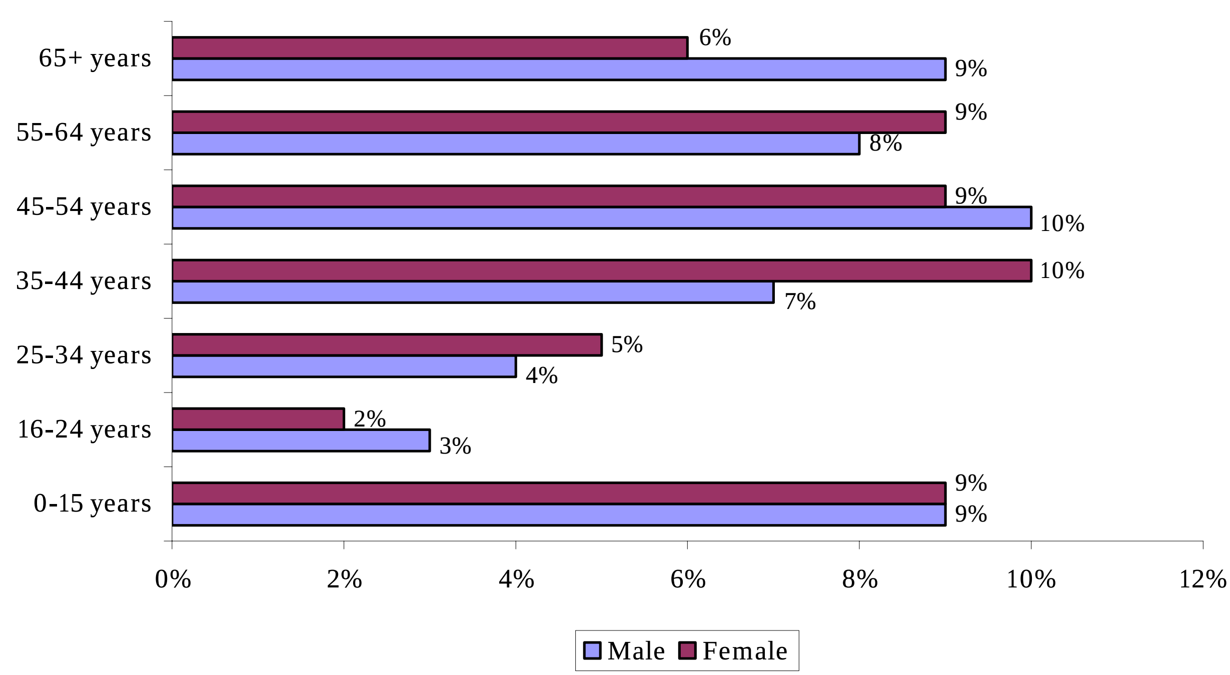
Table 4.2 shows the age profiles of people visiting locations within the AONB. The largest age group recorded was the group aged 45-54 years old (19%). The second largest group was adults aged 35-44 and 55 to 64 years old (17% each).

Table 4.2: Age Profiles – All Visitors

	Male	Female	Total
0-15 years	9%	9%	18%
16-24 years	3%	2%	5%
25-34 years	4%	5%	9%
35-44 years	7%	10%	17%
45-54 years	10%	9%	19%
55-64 years	8%	9%	17%
65+ years	9%	6%	15%
Total	**50%**	**50%**	**100%**

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

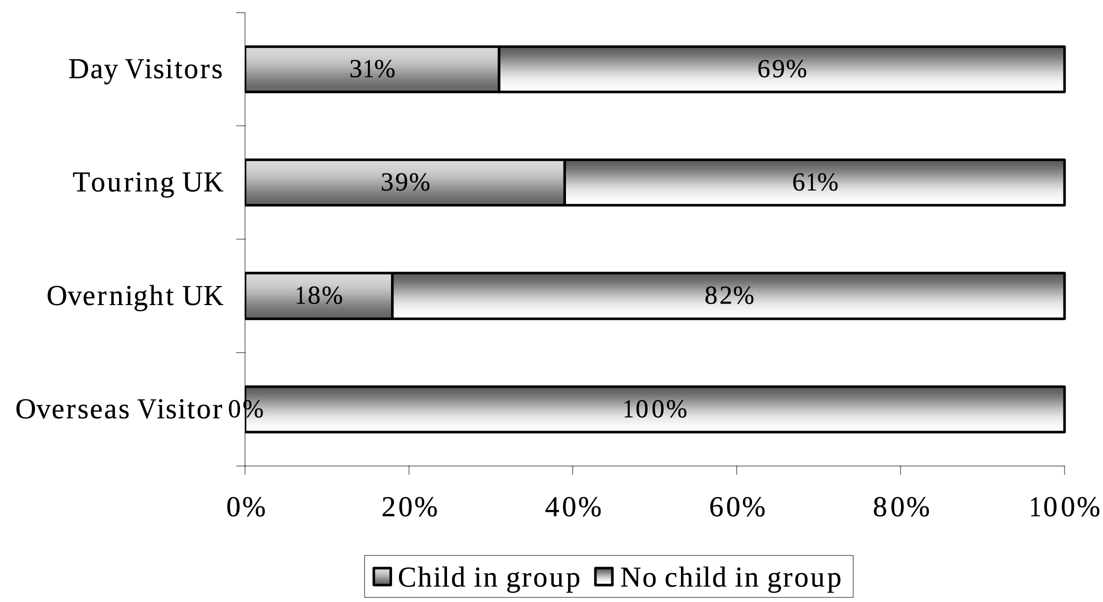
Figure 4.2: Age Profiles - All visitors



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



Just over a quarter (26%) of visitors had one or more children in their group. This is below the county figure of (31%).

Figure 4.3 shows that a greater proportion of groups with children can be seen amongst touring visitors and the day visitor sector, where 39% and 31% of groups contained children respectively. No overseas visitors contained children in their party, although it should be noted that this is from a very small sample.

4.05 Day Visitors

A total of 186 day visitors provided demographic data for analysis, giving an average (mean) of 3.0 people per group - a total of at least 558 people included in the survey sample. 34% of day visitors were visiting with their partner only. The structure of these groups is shown below in Figure 4.4 and Table 4.3.

Figure 4.4: Party Composition - Day Visitors

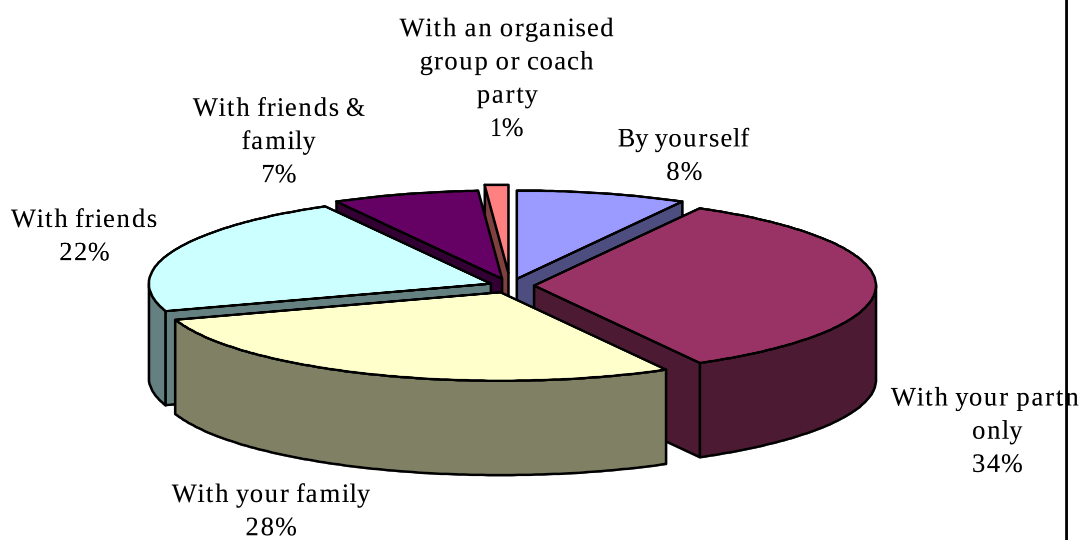


Table 4.3: Age Profiles – Day Visitors			
	Male	**Female**	**Total**
0-15 years	10%	10%	20%
16-24 years	3%	3%	6%
25-34 years	3%	5%	8%
35-44 years	7%	11%	18%
45-54 years	10%	9%	19%
55-64 years	8%	9%	17%
65+ years	6%	6%	12%
Total	**47%**	**53%**	**100%**

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

4.06 Touring (UK) Visitors

A total of 18 touring (UK) groups, comprising 60 people in total provided demographic data, giving an average (mean) of 3.3 people per group.

Figure 4.5: Party Composition - Touring UK Visitors

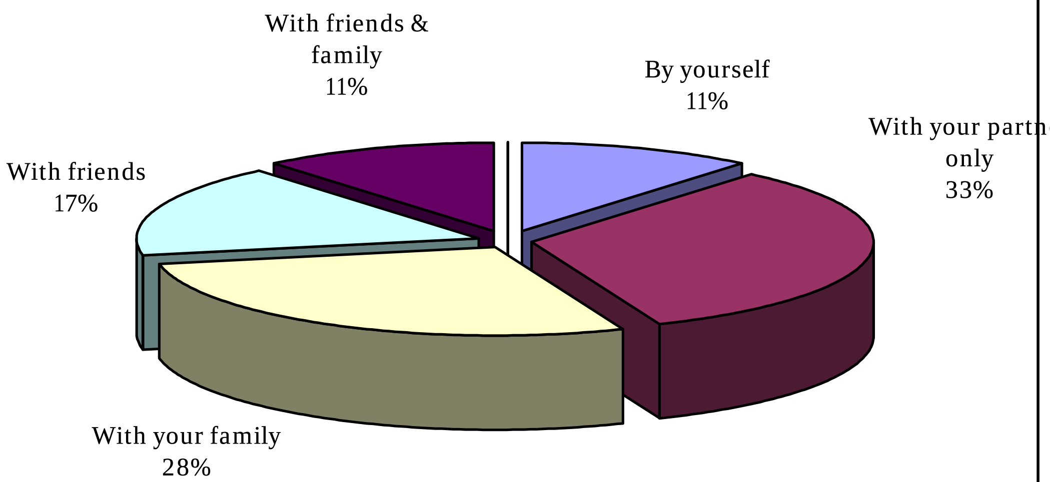


Table 4.4: Age Profiles – Touring UK Visitors			
	Male	**Female**	**Total**
0-15 years	13%	13%	26%
16-24 years	-	-	-
25-34 years	3%	3%	6%
35-44 years	7%	10%	13%
45-54 years	12%	5%	17%
55-64 years	2%	13%	15%
65+ years	13%	5%	18%
Total	**50%**	**49%**	**99%**

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

4.07 Overnight UK Visitors

96 groups of domestic overnight visitors, with an average (mean) of 2.7 people per party, provided demographic data, a total of at least 262 people included in the survey sample.

Figure 4.6: Party Composition - Overnight UK Visitors

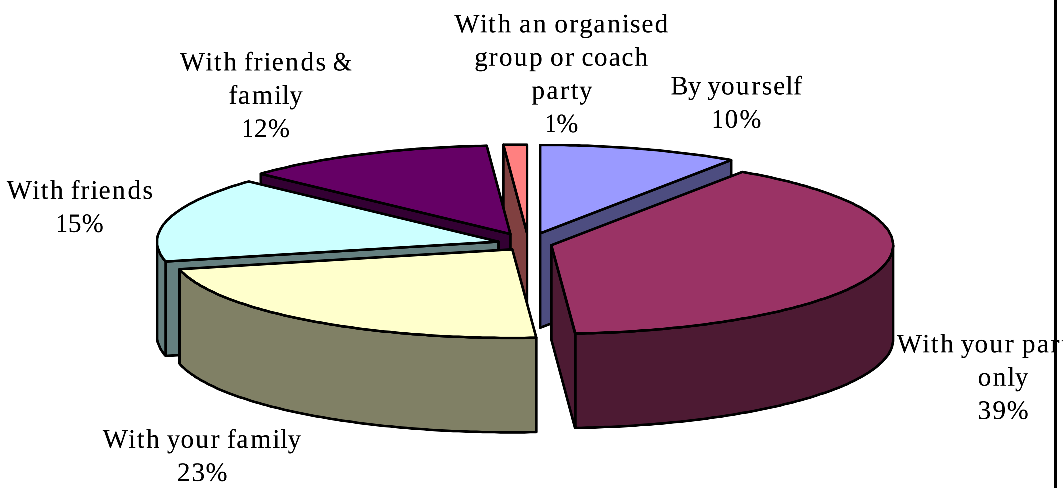


Table 4.5: Age Profiles – Overnight UK Visitors			
	Male	**Female**	**Total**
0-15 years	6%	6%	12%
16-24 years	4%	2%	6%
25-34 years	5%	4%	9%
35-44 years	8%	9%	17%
45-54 years	8%	9%	17%
55-64 years	9%	8%	17%
65+ years	13%	8%	21%
Total	**53%**	**46%**	**99%**

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

4.08 Overseas Visitors

6 groups of overseas visitors comprising 12 people in total provided demographic data, giving an average (mean) of 2.0 people per party.

Figure 4.7: Party Composition - Overseas Visitors

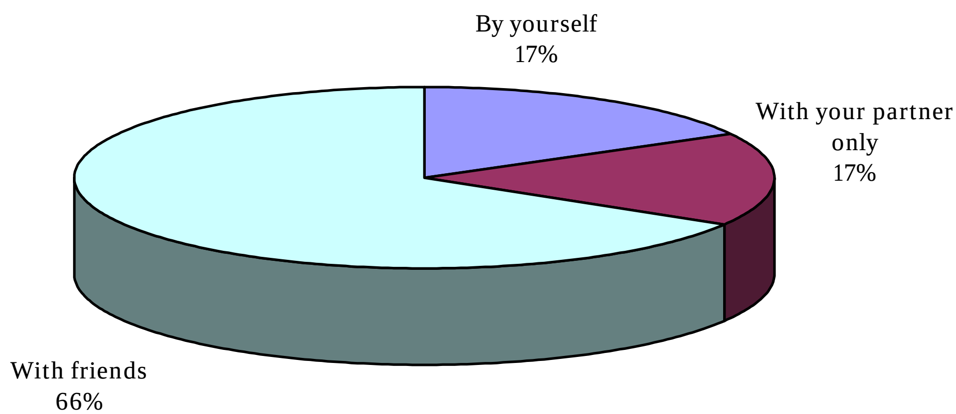


Table 4.6: Age Profiles –Overseas Visitors			
	Male	**Female**	**Total**
0-15 years	-	-	-
16-24 years	-	-	-
25-34 years	17%	8%	25%
35-44 years	-	-	-
45-54 years	33%	8%	41%
55-64 years	17%	-	17%
65+ years	8%	8%	16%
Total	**75%**	**24%**	**99%**

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 district. 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

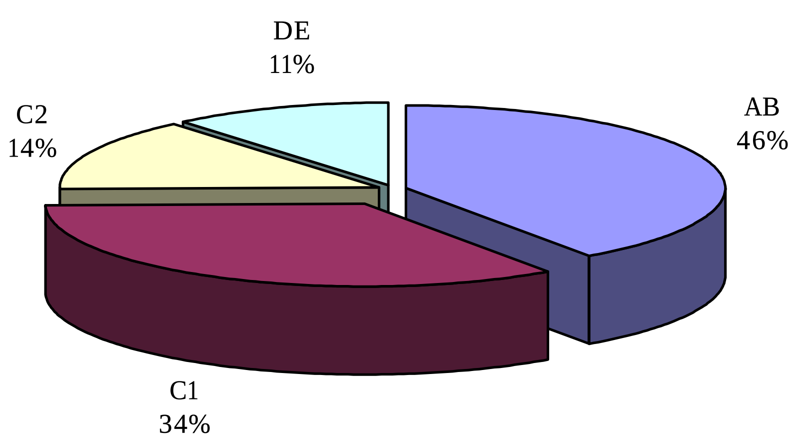


Table 5.1: Socio Economic Group – by Type of Visitor						(315)
	AONB Total	***Shropshire Total***	**Day Visitor**	**Touring UK**	**Overnight UK**	**Overseas Visitors**
AB	**40%**	*30%*	41%	44%	40%	-
C1	**34%**	*36%*	32%	22%	39%	33%
C2	**14%**	*19%*	15%	11%	12%	33%
DE	**11%**	*15%*	11%	22%	8%	33%

Across the whole of the AONB, almost three quarters (74%) of visitors are in the ABC1 groups. This is above the county figure of 66%.

Comparing the structure of the three domestic markets it is evident that the proportion of ABC1 visitors varies in each segment. The overnight UK market in the AONB has 79% ABC1 visitors, higher than all other segments.

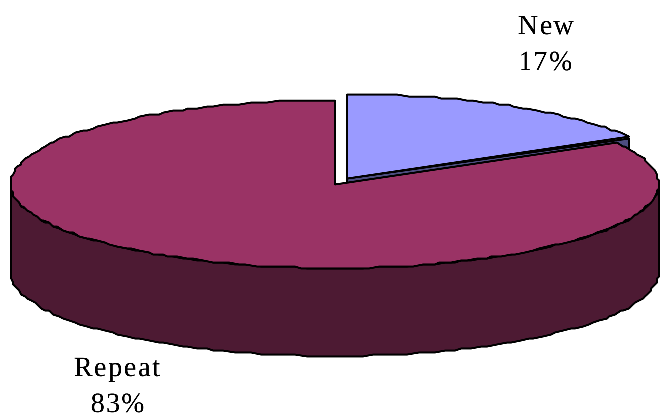
11% of visitors to the AONB were classified as DEs, lower than the county figure of 15%.

6.0 NEW/REPEAT VISITORS

6.01 Segment Variation

Visitors were asked if they had ever been to the Shropshire Hills AONB on a previous occasion and if so what type of trip it had been. The presence of first time visitors to the area is important in terms of visitor management, presuming their lack of knowledge about the area. More than 8 out of 10 of respondents (83%) 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 the AONB 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 the AONB 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 AONB area.

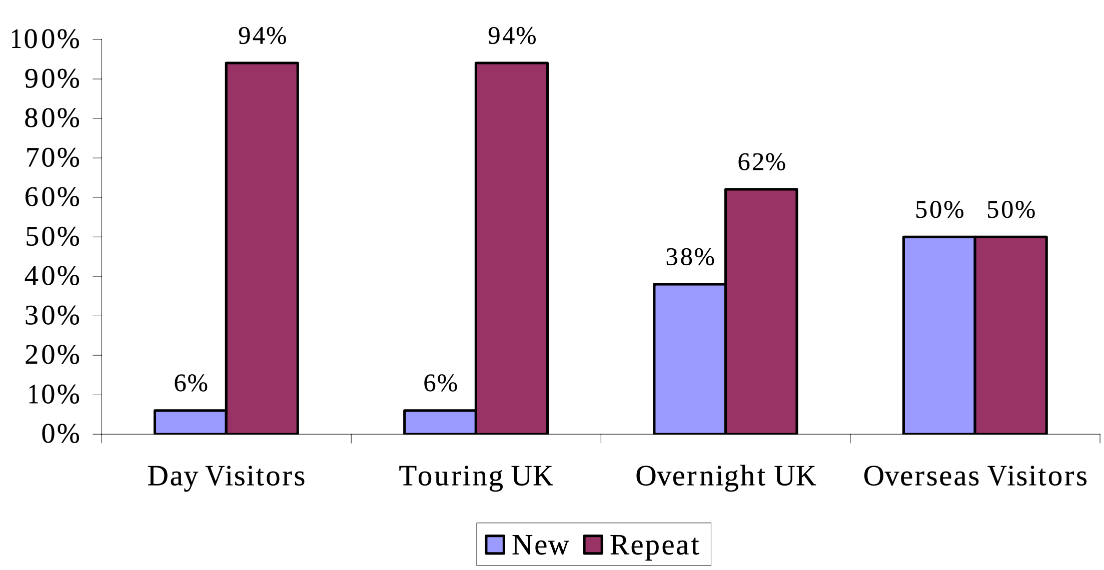
Table 6.1 shows how the visitor market in The Shropshire Hills AONB compares with other districts within the Heart of England Region.

Table 6.1: New/Repeat Visitors		***(317)***
	New	**Repeat**
AONB	***17%***	***83%***
South Shropshire 2007	*20%*	*80%*
Shropshire County 2007	*24%*	*76%*
Wyre Forest 2005 Visitor Survey	16%	84%
Wychavon 2005 Visitor Survey	11%	89%

The above table shows that the AONB has a tourism product that attracts a higher proportion of new visitors, compared to the 2 comparator districts in 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.

Figure 6.2: New/Repeat Visitors by Type of Visitor



Unsurprisingly, the majority of day visitors to the AONB (94%) have visited the area before, compared to only 50% of overseas visitors. A higher proportion of touring UK visitors have visited the AONB before, compared with overnight UK visitors (94% and 62% respectively).

6.02 Types of previous visit to the Shropshire Hills AONB

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 67% of all repeat visitors had previously been to the area as a day visitor and 15% had previously stayed overnight.

18% of repeat visitors to the AONB had been for both a day and a staying trip.

Figure 6.3: Previous Type of Visit to the AONB

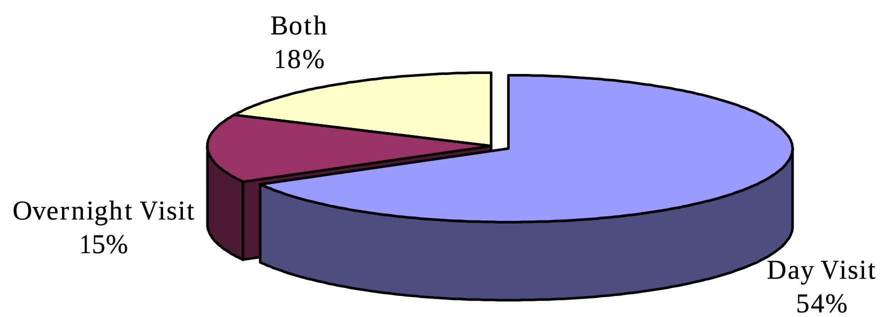


Table 6.2 below shows the different characteristics of the market segments with respect to the type of previous visit they had made.

Table 6.2: Type of Previous Visit			(261)
	Day Visitor	**Touring UK**	**Overnight UK**
Day Visit	87%	29%	17%
Overnight Visit	0%	29%	53%
Both	13%	41%	29%

NB: The sample size for the overseas segment is too small for any results to be produced.

Of the day visitors who had been to the AONB before, almost 9 out of 10 (87%) 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. Nobody had previously been to the area as an overnight visitor only while one fifth (20%) had previously visited for both an overnight stay and for the day.

Looking at the overnight UK visitors, over half (53%) had previously been on an overnight visit. Almost one third (29%) of visitors had previously been to the area for both a day visit and an overnight trip, with 17% having previously only visited as a day visitor.

6.03 Time since last visit to the Shropshire Hills AONB

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

Table 6.3: Number of Previous Visit in Last Five Years *(264)*

	Total	Day Visitors	Touring UK	Overnight UK
Zero	9%	4%	18%	20%
1 time	8%	7%	24%	7%
2 times	9%	8%	12%	13%
3-5 times	19%	16%	23%	25%
6-10 times	10%	10%	0%	10%
More than 10 times	45%	55%	23%	25%

NB: The sample size for the overseas segment is too small for any results to be produced.

Day visitors were the most frequent visitors to the AONB with almost three fifths (55%) returning to the area more than ten times in the past five years. Almost half (46%) of touring UK visitors had visited the area at least 3 times during the last five years.

UK visitors staying overnight in the district were the market least likely to have visited the area within the last five years (20%); only 4% of day visitors who had visited the AONB before had not visited within the last five years.

7.0 LENGTH OF STAY

7.01 Length of Stay in the AONB

Visitors were asked how long their whole trip was and how long they envisaged staying overnight in the local area. On average, overnight UK visitors and overnight overseas visitors spent 4.5 nights in the area.

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

Table 7.1: Length of Stay – Nights ***(103)***

		AONB UK/Overseas Overnight Visitors	*Shropshire UK/Overseas Overnight Visitors*
SHORT BREAK	1 Night	**14%**	*16%*
(63%)	2 Nights	**34%**	*24%*
	3 Nights	**15%**	*20%*
LONG STAY	4 Nights	**8%**	*7%*
(37%)	5 Nights	**2%**	*6%*
	6 Nights	**2%**	*5%*
	7 Nights	**12%**	*11%*
	8+ Nights	**13%**	*10%*

As the table shows, length of stay for staying visitors (both overseas and domestic combined) to the AONB was slightly more on the short break rather than long stay (63% and 37% respectively.)

There has been a shift over the last 5 years with domestic visitors favouring short breaks in the UK and main holidays abroad.

Table 7.2 indicates the average length of stay of overnight visitors to the AONB (and surrounding area) according to the type of accommodation used.

Table 7.2: Average Length of Visit			***(103)***
Overall Average Length of Stay			**4.5 nights**
All Overnight	-	*Serviced Accommodation*	**3.1 nights**
Visitors	-	*Non-serviced Accommodation*	**5.3 nights**
	-	*Friends/relatives*	**6.0 nights**

7.02 Day/Touring Visitors Length of Stay in the AONB

214 responding domestic and overseas visitors surveyed who were in the Shropshire Hills AONB for a day or touring trip, were asked how long (in hours) they intended to spend in the area. The average length of stay for both day and touring visitors in the District was approximately **3 hours 54 minutes;** this included all visitors at all locations and attractions. This is slightly lower than the county average of **4 hours 14 minutes.**

For UK day visitors the average stay was **3 hours 53 minutes**. Domestic touring visitors to the AONB stayed for a slightly greater amount of time, **4 hours and 8 minutes**. This is below the county average of **4 hours and 22 minutes** for touring UK visitors**.**

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

Table 7.3: Length of Stay – hours			***(214)***
Number of hours	**Total**	**Day Visitors**	**UK Touring**
One hour	**3%**	2%	14%
Two hours	**22%**	22%	21%
Three hours	**27%**	28%	7%
Four hours	**19%**	19%	21%
Five hours	**9%**	10%	-
Six hours	**11%**	10%	14%
Seven hours	**3%**	3%	7%
Eight hours	**5%**	4%	14%
Nine hours +	**2%**	2%	-

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

NB: The overseas sample is too small for any analysis

Although on average, touring visitors stayed longer, they were also more likely to pay a fleeting visit to the AONB, with 35% staying for two hours or less. Day visitors were most likely to stay for three hours (27%).

Almost two thirds (65%)of new visitors stayed in the AONB for two or three hours compared with less than half (47%) of repeat visitors. Although new visitors were more likely to spend eight or more hours in the area, repeat visitors were more likely to spend four to six hours in the area.

Table 7.4: Length of stay by New / Repeat Visitors *(214)*

Number of hours	**New**	**Repeat**
One hour	-	3%
Two hours	29%	21%
Three hours	36%	26%
Four hours	-	20%
Five hours	7%	9%
Six hours	14%	10%
Seven hours	-	4%
Eight hours	7%	6%
Nine hours +	7%	3%

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

8.0 ACCOMMODATION

8.01 Accommodation used in the AONB (and surrounding area)

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

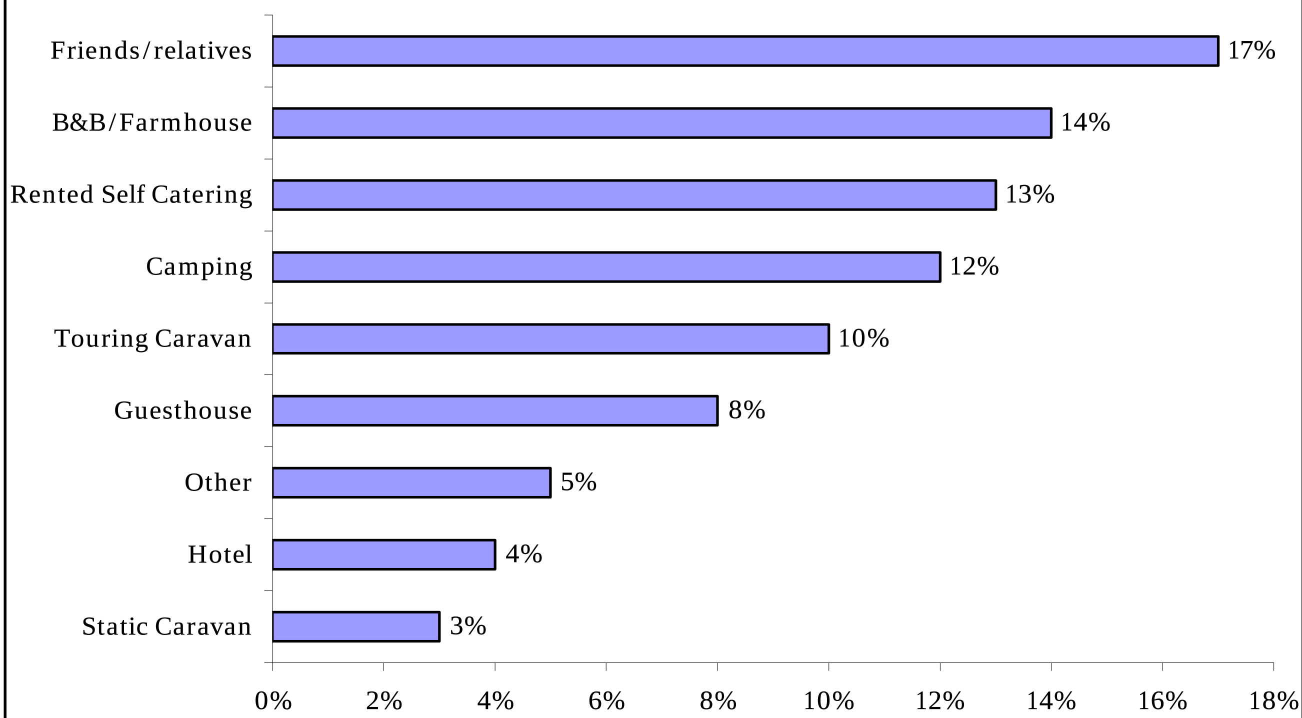
Youth hostels, university accommodation, caravan parks and campsites that offer a certain amount of facilities

VFR

Visiting friends and relatives

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

Figure 8.1: Accommodation Used



The non-serviced market (including self catering) in the AONB accounts for 38% of visitors, compared with the 27% of visitors to Shropshire who used this type of accommodation. This represents the most popular accommodation for visitors to the area. Just over a quarter (26%) of overnight visitors to the AONB stayed in serviced accommodation (hotels, guesthouses and B&Bs), lower than the county figure of 47%.

17% of respondents were staying with friends or relatives (VFR) in the district. 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 the AONB (98)			
	AONB UK/Overseas Overnight Visitors	South Shropshire UK /Overseas Overnight Visitors	Shropshire UK /Overseas Overnight Visitors
Friends/Relatives	17%	17%	23%
Bed & Breakfast / Farmhouse	14%	15%	8%
Rented Self Catering (Cottage/flat/house)	13%	21%	9%
Camping	12%	12%	6%
Touring Caravan	10%	9%	11%
Guesthouse	8%	7%	5%
Other	5%	6%	3%
Hotel	4%	10%	14%
Static Caravan	3%	3%	2%

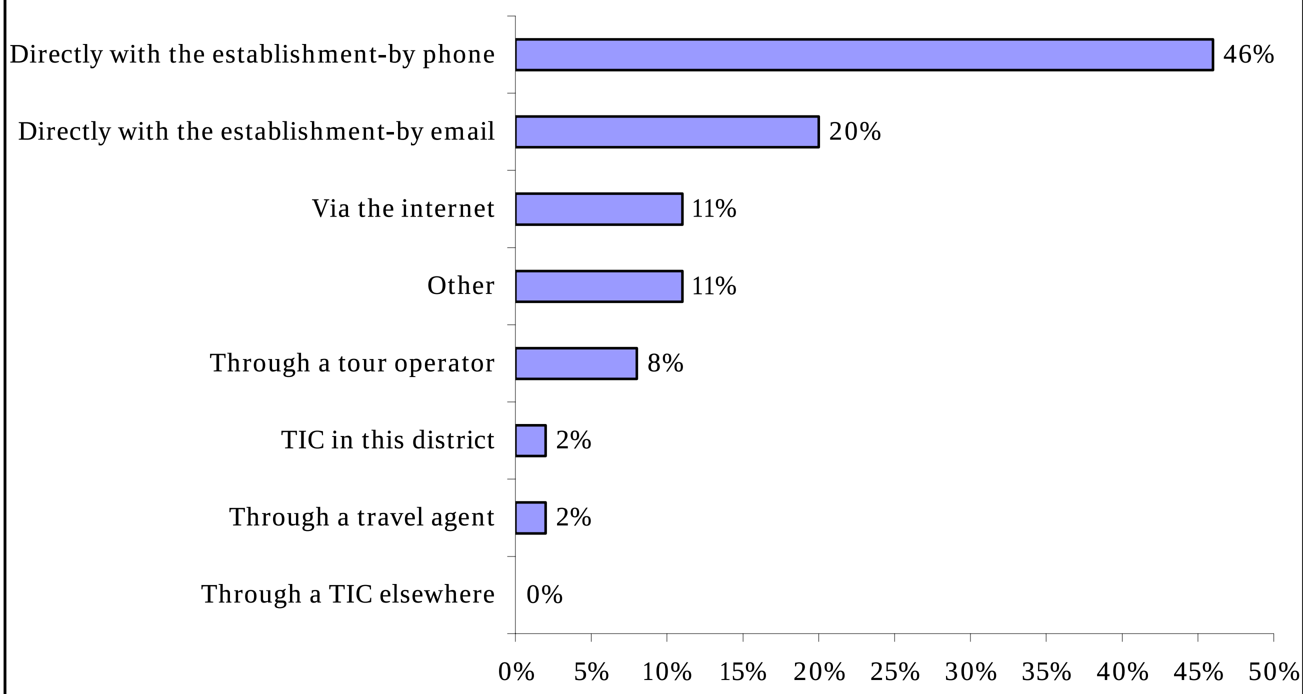
Table 8.1 shows that visitors staying with friends / relatives are an important part of the tourism product for the area and accounts for 17% of accommodation used in the AONB. B&B / farmhouse is the next most popular for of accommodation, with 15% of visitors choosing this form.

Although a higher proportion of visitors to the AONB stay in self-catering accommodation in comparison within the county as a whole (13% compared with 9%), this is lower than the South Shropshire figure of 21%.

8.02 Pre-booking of Accommodation

Of the visitors staying overnight (excluding those visitors staying with friends and relatives), 89% had booked their accommodation prior to arrival, while 6% booked on arrival. At the time of interview, 5% of visitors had not yet booked their accommodation. Almost half (46%) had pre-booked directly with their establishment (by phone), while a fifth (20%) had emailed the establishment directly. 11% had booked via the internet.

Figure 8.2: Pre-booked accommodation



8.03 Rating of Accommodation

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

Table 8.2: Rating of Accommodation *(60)*

	Mean	Very Good	Good	Average	Poor	Very Poor
Range of accommodation	**4.2**	41%	37%	20%	2%	-
Quality of service at accommodation	**4.5**	55%	40%	5%	-	-
Value for money at accommodation	**4.5**	58%	32%	10%	-	-

Ratings given to accommodation establishments in the AONB and surrounding areas 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.

78% of respondents stated that the range of accommodation available was good or very good. Only 2% stated that the range was poor.

The quality of service in the establishment was rated as good or very good by over 9 out of 10 (95%) of visitors.

9 out of 10 (90%) visitors rated value for money as very good or good.

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). The AONB is above the regional average, with 94% of all respondents using cars. This is higher than the Shropshire County figure, of 86% of visitors arriving at their destination by car. The use of the car was marginally higher amongst repeat visitors (94%) compared with 92% of respondents visiting the district 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). A lower proportion of visitors to the AONB used public transport as their main mode of transport to the area (5%).

4% of new visitors used coach tours as their mode of transport to the AONB and surrounding areas. In contrast, no new visitors used a bicycle compared with 3% of repeat visitors.

Table 9.1: Mode of Transport *(317)*

	AONB Total	South Shropshire Total	Shropshire Total	New	Repeat
Car/Motorcycle/ Van	**94%**	**89%**	*86%*	92%	94%
Train	**2%**	**3%**	*3%*	2%	2%
Bicycle	**2%**	**1%**	*1%*	-	3%
Coach tour	**1%**	**4%**	*2%*	4%	-
Bus/Coach service	**1%**	**2%**	*3%*	0%	1%
Other	**1%**	**2%**	*1%*	0%	1%
Walked	**0%**	**0%**	*0%*	0%	0%

Across the various market segments of visitors visiting the district, the transport mode varied significantly. For example, 100% of touring UK visitors came by car, compared with 89% of overnight visitors. A higher percentage of overnight visitors used other modes of transport, including the train, a coach tour or bicycle.

Table 9.2: Mode of Transport by Type of Visitor *(317)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Car/Motorcycle/van	94%	96%	100%	89%	100%
Train	2%	1%	0%	5%	0%
Bicycle	2%	3%	0%	2%	0%
Coach tour	1%	1%	0%	2%	0%
Bus/Coach service	1%	1%	0%	0%	0%
Other	1%	0%	0%	3%	0%
Walked	0%	0%	0%	0%	0%

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

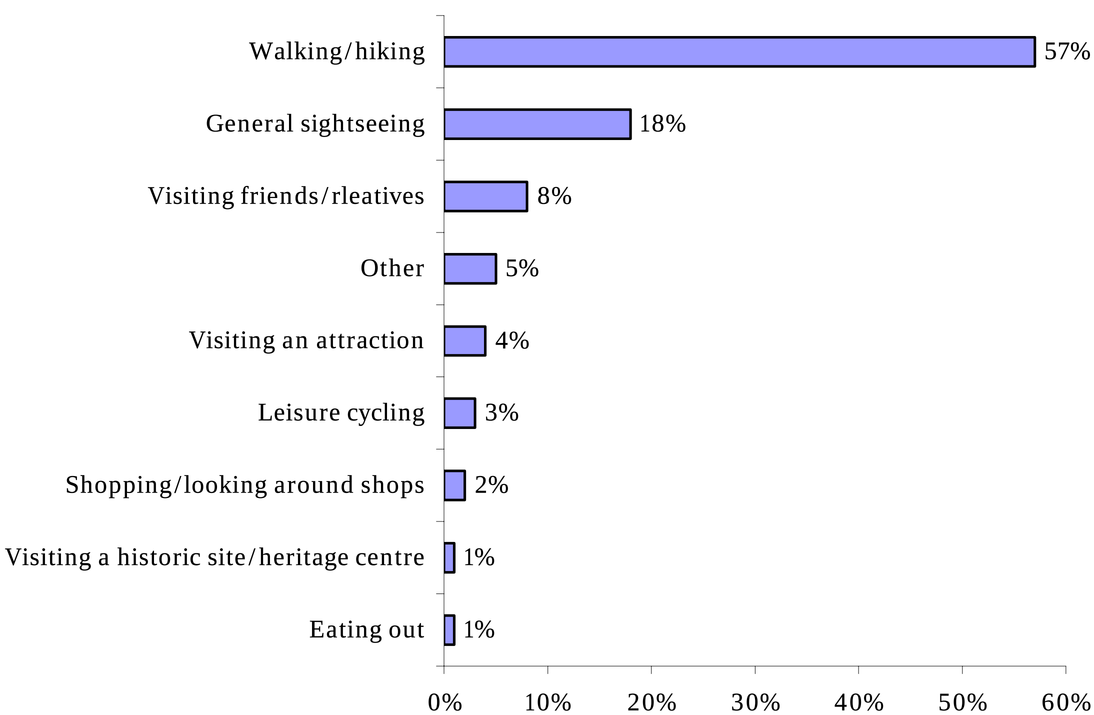
10.0 ACTIVITIES UNDERTAKEN BY VISITORS WHILST IN THE DISTRICT

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 district. Only one answer was given per party.

Figure 10.1 indicates that walking/hiking and general sightseeing were the **primary** motives for respondents to visit the AONB. *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

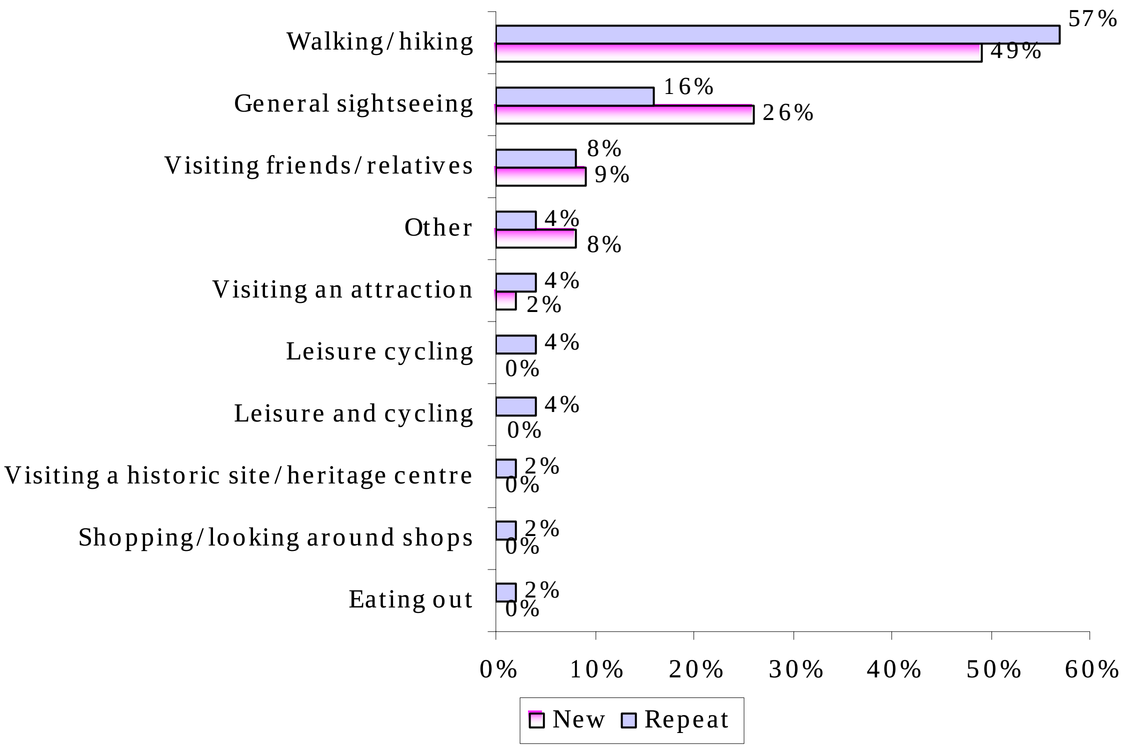


Walking/hiking and general sightseeing were the most popular main activities undertaken by visitors to the AONB (57% and 18% respectively). The proportion of visitors to the AONB undertaking walking as their principal activity is substantially higher than the county as a whole, and the corresponding proportion of visitors undertaking general sightseeing as their main activity was notably lower (12% and 26% walking and sightseeing countywide).

Other primary reasons given included: visiting friends/relatives (8%), visiting an attraction (4%) and leisure cycling (3%).

New visitors were more likely to state general sightseeing (26%) as their main activity, compared with 16% of repeat visitors. A slightly higher proportion of repeat visitors stated walking/ hiking as their main activity (57%) compared with (49%) of new visitors.

Figure 10.2: Main Activity Undertaken by New/Repeat Visitors



10.02 Main Activity Undertaken by Market Segment

Two thirds (66%) of day visitors stated walking/hiking was their main activity whilst on their visit to the AONB, as did 39% of overnight UK visitors and 50% of overseas visitors. Approaching half (44%) of touring UK visitors stated general sightseeing as their main activity.

Table 10.1: Main Activities Undertaken by Type of Visitor *(317)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Walking and hiking	57%	66%	39%	39%	50%
General Sightseeing	18%	15%	44%	16%	33%
Visiting friends and relatives	8%	1%	6%	22%	17%
Other	5%	4%	-	8%	-
Visiting an attraction	4%	5%	-	1%	-
Leisure and cycling	3%	4%	-	3%	-
Shopping/looking around shops	2%	2%	-	1%	-
Visiting a historic site/heritage centre	1%	-	11%	2%	-
Eating out	1%	1%	-	-	-

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

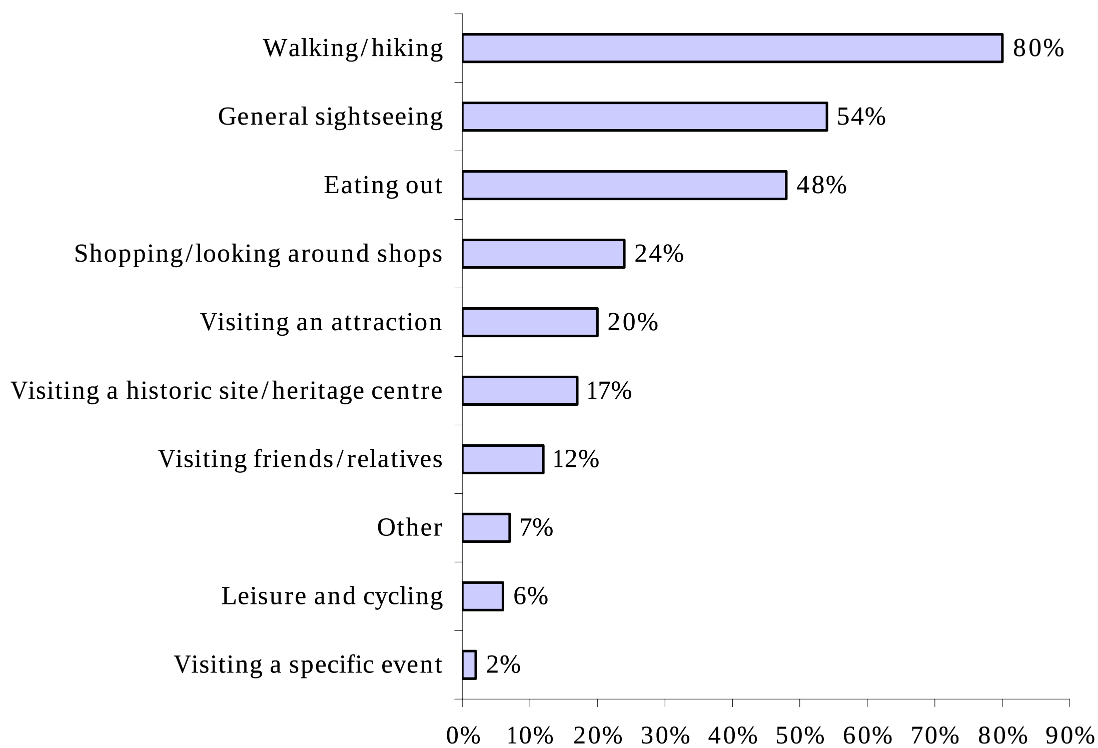
Other activities included painting, looking to buy a house and pub/drinking.

10.03 Other Activities Undertaken in the AONB

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

Figure 21 indicates that walking (80%), general sightseeing (54%) and eating out (48%) were the most popular activities overall, undertaken by visitors in the Shropshire Hills AONB. *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 24% of respondents followed by visiting an attraction (20%).

11.0 PRE-TRIP SOURCES OF INFORMATION

11.01 Influenced Visit to the AONB

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

- 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

Almost two thirds (65%) of all respondents stated a previous visit had encouraged them to return to the AONB. An additional 13% stated a personal recommendation / word of mouth and 3% stated leaflets or brochures had influenced their choice to visit.

88% of visitors had been influenced by some form of information when planning their trip, only 12% had not, slightly less than those visitors to Shropshire who had not been influenced (20%). A previous visit or personal recommendations were primary influences stated by visitors across all market segments.

Table 11.1: Influenced Visit to the AONB – by Type of Visitor					(317)
	Total	**Day Visitors**	**Touring UK**	**Overnight UK**	**Overseas Visitors**
Previous Visit	65%	67%	89%	61%	17%
Personal Recommendation / Word of mouth	13%	15%	6%	8%	50%
None	12%	12%	6%	13%	17%
Tourism leaflets / brochures/visitor guides	3%	4%	-	1%	-
Guide books	1%	1%	-	2%	-
Internet	1%	1%	-	1%	-
Newspaper/Magazine article	1%	1%	-	-	-
Television/radio	0%	1%	-	-	-
Tour operator/travel agent	0%	1%	-	-	-

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

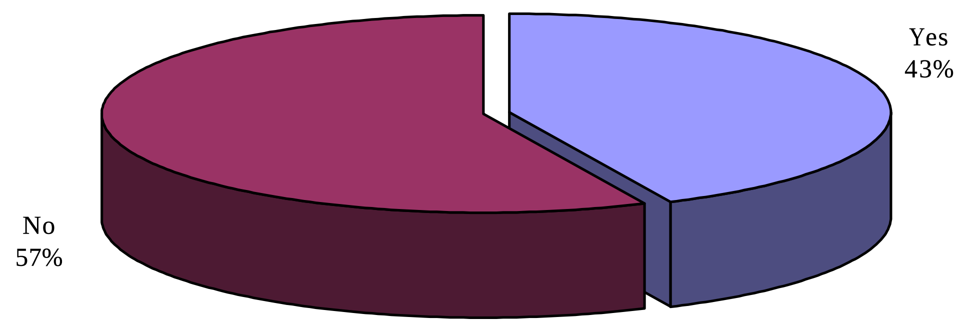
Visitors who indicated that tourism leaflets/brochures had influenced their visit (*8 interviewees*) were also asked where they had obtained this information:

- 25% had gathered the leaflets/brochures from a TIC at their place of residence.
- 25% had obtained the information from an attraction.
- 13% had gathered the leaflet from a TIC en route.
- 13% had received their information via a direct mailing.

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 the Shropshire AONB. Overall, just under half (43%) of visitors indicated that they had used, or did 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 (*134 respondents*), 37% indicated that they gathered the information from a Tourist Information Centre. An additional 43% obtained information from walking guides/maps and almost a fifth (18%) gained information from racks at attractions. A slightly higher proportion (22%) gathered information through leaflets/racks at accommodation.

The level and type of information used in the AONB is shown in table 11.2 below.

Table 11.2: Information Use whilst in the AONB – by Type of Visitor *(134)*

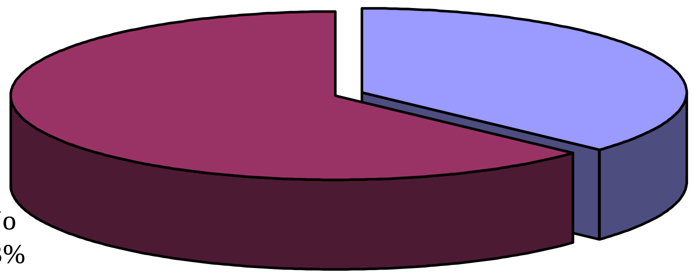
	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Walking guides / maps	43%	34%	45%	56%	100%
Tourist Information Centre	37%	35%	45%	38%	100%
Brochures / racks at accommodation	22%	21%	18%	24%	100%
Information racks at attractions	18%	21%	45%	8%	-
Other	16%	14%	-	22%	-
Tourist Information Points / kiosk	10%	17%	9%	2%	-
Advice at accommodation	8%	4%	18%	10%	100%
Tourist Information Boards	8%	8%	18%	6%	-
WAP phone/ internet	8%	1%	27%	14%	-

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

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. Just over two thirds (70%) of 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 a half (49%) indicated that they felt locally sourced food and drink was an important consideration. This is higher when compared with those visitors to the county, with 38% stating that locally sourced food and drink was important. 20% thought access to public transport was an important consideration, lower than the county average (29%). 'Other' was noted by 40% of visitors *(37 interviewees)*.

Table 11.3: Environmental Impact – by Type of Visitor *(147)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Locally sourced food and drink	49%	49%	63%	47%	43%
Access to public transport	20%	16%	38%	23%	29%
Energy efficient accommodation	19%	13%	25%	30%	14%
Other	40%	45%	50%	27%	57%

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 the area and asked to advise which they had visited or intended to visit on this trip. Almost a quarter (24%) of all visitors indicated they had not visited/ intended to visit any of the listed towns / villages within Shropshire on this trip.

Table 12.1: Towns / Villages visited this trip – by Type of Visitor *(317)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Church Stretton	41%	**39%**	**44%**	**44%**	50%
None	24%	29%	5%	18%	17%
Ludlow	17%	**12%**	**11%**	**28%**	**17%**
Shrewsbury	16%	15%	17%	19%	**17%**
Clun	16%	10%	28%	27%	17%
Telford	15%	16%	11%	12%	17%
Craven Arms	10%	**5%**	**28%**	**15%**	**17%**
Bishop's Castle	10%	7%	22%	12%	17%
Ironbridge	10%	9%	11%	10%	17%
Other	6%	5%	-	8%	-
Bridgnorth	4%	2%	6%	8%	17%
Ellesmere	2%	2%	-	1%	-
Cleobury Mortimer	1%	-	-	2%	-
Oswestry	1%	1%	-	2%	-
Wem	1%	1%	6%	1%	-
Whitchurch	1%	1%	6%	1%	-
Market Drayton	1%	1%	-	1%	-
Broseley	1%	1%	-	1%	-

Table 12.1 illustrates, that the most popular town / villages visited by respondents during this trip are; Church Stretton, Ludlow, Shrewsbury, Clun and Telford (41%, 17%, 16%, 16% and 15% respectively). Unsurprisingly, the touring/overnight/overseas segments are more likely to visit another town / village than day visitors.

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	63%	74%	-
Cardingmill Valley	23%	3%	4.8
Stokesay Castle	**2%**	**4%**	**5.0**
Shropshire Hill Discovery Centre	3%	2%	3.5
Ironbridge Toll House	3%	2%	4.6
Blists Hill Victorian Town	3%	2%	**5.0**
Telford Town Park	3%	-	4.8
RAF Museum (Cosford)	2%	-	**5.0**
Severn Valley Railway	1%	2%	**5.0**
Jackfield Tile Museum	1%	-	4.0
Enginuity	1%	0%	4.0
Weston Park	1%	-	4.5
Hawkstone Park Follies	**1%**	**0%**	**5.0**
Telford Steam Railway	**1%**	**-**	**5.0**
Park Hall Farm	1%	-	4.0
Hodnet Hall	0%	-	-
Whittington Castle	1%	0%	-
Hoo Farm	1%	1%	-
Wonderland	1%	-	-

All attractions scored highly with visitors, which is encouraging. The top 6 ranked attractions have been highlighted on the table. (However, please note that bases for knowledge of each attraction do vary.)

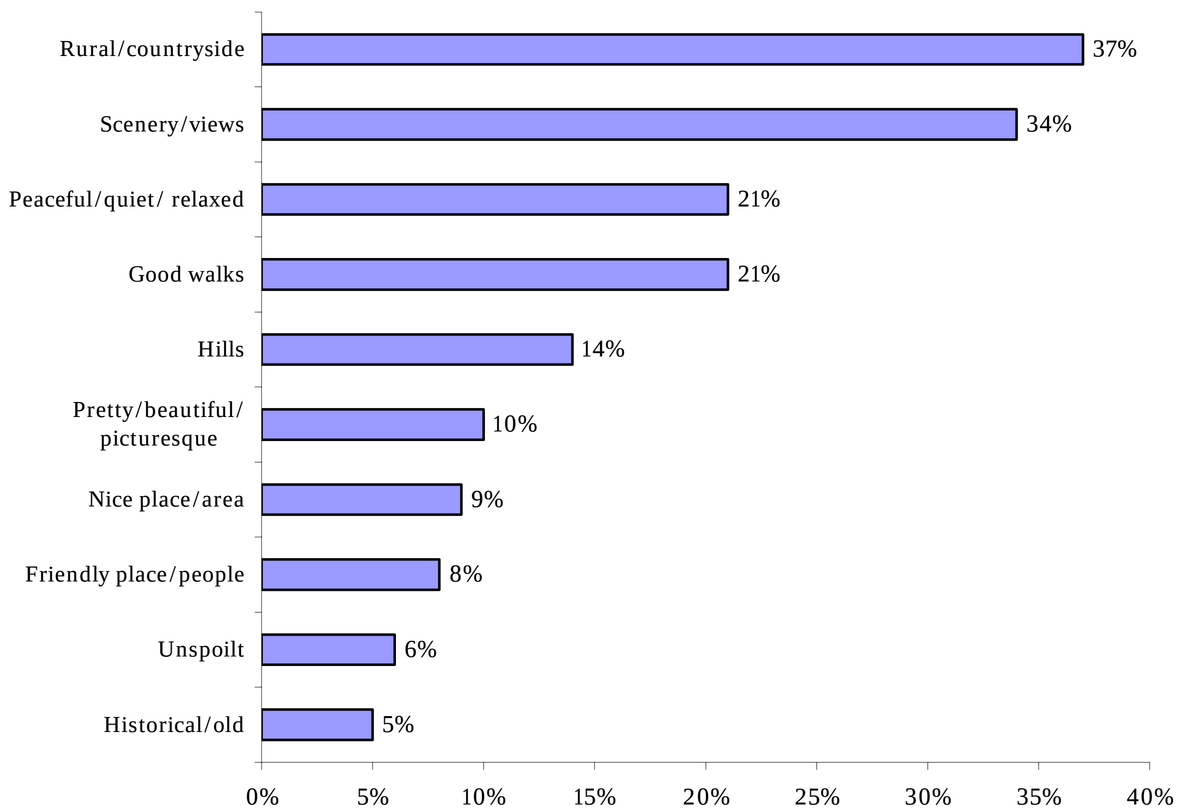
14.0 Satisfaction Levels of Visitors to the Shropshire Hills AONB

14.01 What Visitors like about the AONB

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

Across the area, comments were made by nearly all 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 AONB



Across all categories, the rural/countryside aspect (37%) to the AONB, the scenery / views (34%) and the peaceful/quiet/relaxed atmosphere (21%) featured heavily. Only 23% of visitors to Shropshire stated the rural/countryside aspect, 15% noted the scenery / views and 13% liked the peaceful/quiet/relaxed atmosphere.

- Day visitors liked the **rural/countryside** aspect **(35%);** the **scenery / views (34%), good walks (22%)** and the **peaceful/quiet/relaxed** atmosphere **(19%)**.

- Touring UK visitors also liked the **rural/countryside** aspect **(44%);** the **scenery / views (39%)** and the **hills (22%)**

- Similarly, overnight UK visitors liked the **rural/countryside** aspect **(39%),** the **scenery / views** (33%) and the peace and quiet **(26%).**

- Overseas visitors liked the **rural/countryside (50%)** aspect of the area, the **scenery/views (17%)** and the **good walks (33%).**

Table 14.1: Likes about the AONB – by Type of Visitor *(317)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
Rural/Countryside/nature	37%	35%	44%	39%	50%
Scenery/Views	34%	34%	39%	33%	17%
Peaceful/quiet/relaxed	21%	19%	17%	26%	-
Good walks	21%	22%	17%	19%	33%
Hills	14%	13%	22%	15%	-
Pretty/beautiful/picturesque	10%	8%	17%	15%	-
Nice place/area	9%	9%	6%	7%	17%
Friendly place/people	8%	7%	17%	9%	-
Unspoilt	6%	3%	6%	13%	-
Historical/old	5%	7%	11%	2%	-

14.02 What spoilt the visit to the District?

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

Overall, most visitors responded but 69% indicated that nothing had spoilt their visit to the AONB, on a par with those visitors to Shropshire, with (77%) indicating that nothing had spoilt their visit.

Of the comments that were made, 5% related to the weather, while 2% stated that poor toilets/ a lack of toilets or rubbish/litter/dog mess had spoilt their visit to the area.

Table 14.2: Dislikes about the AONB – by Type of Visitor *(317)*

	Total	Day Visitors	Touring UK	Overnight UK	Overseas Visitors
No/None/Nothing	69%	74%	61%	63%	50%
Weather	5%	7%	-	3%	-
Poor toilets/lack of toilets	2%	1%	-	3%	-
Rubbish/litter/dog mess	2%	2%	-	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 the AONB 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 the AONB. 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 the AONB 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	37%
Eating/drinking out	32%
Shopping	17%
Entertainment	3%
Transport / Fuel	10%
Other	2%

The average spend for all visitors to the AONB is £109.02 per party per trip. With an average party size of 2.9, the expenditure rate per person is £37.59 per day.

Visitor spending in the AONB is split between accommodation (37%), eating & drinking (32%) and shopping (17%).

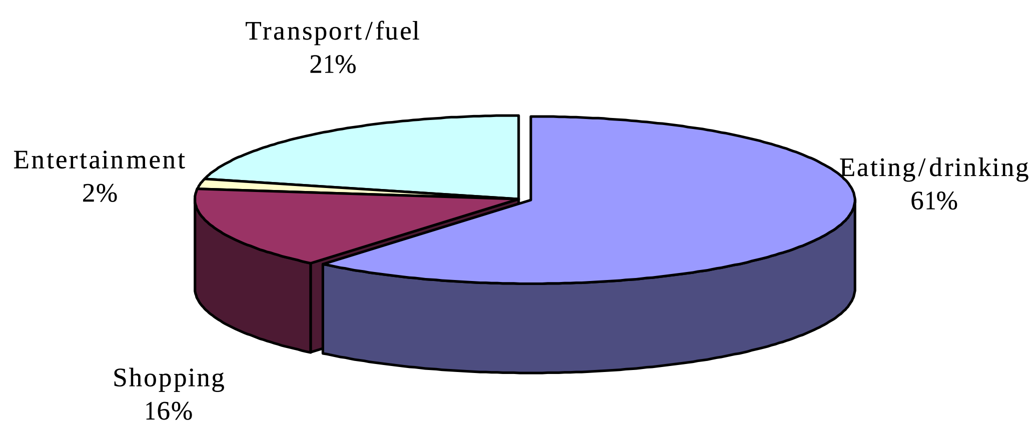
15.02 Day Visitors

On average, a party of day visitors in the AONB spent £19.67. With an average day visiting party size of 3.0 people, the average expenditure rate per person is £6.56 during the day.

Table 15.2: Expenditure Breakdown – Day Visitors ***(196)***

	Total
Eating/drinking out	61%
Shopping	16%
Entertainment	2%
Transport / Fuel	21%
Other	0%

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 3.3 people. A total of £68.76 was spent per party, or £20.84 per head per trip. *These figures include those people visiting the AONB as part of a coach trip or tour.*

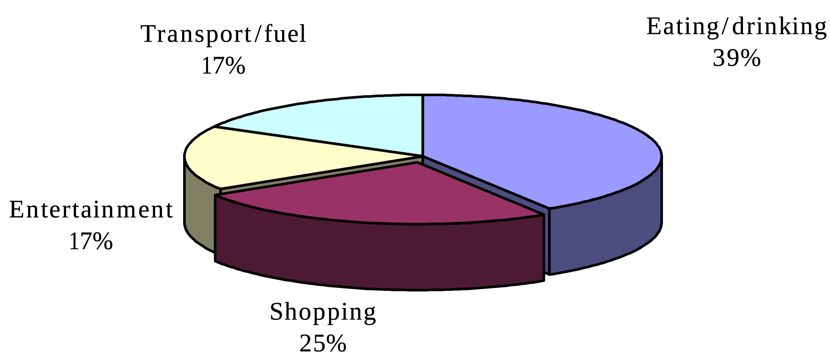
Touring visitors' expenditure is as follows.

Table 15.3: Expenditure Breakdown – Touring UK ***(18)***

	Total
Eating/drinking out	41%
Shopping	25%
Entertainment	17%
Transport / Fuel	17%
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

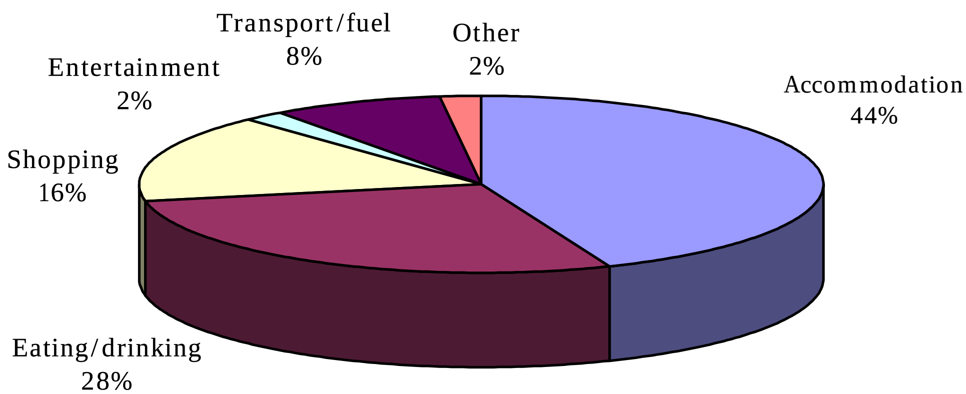
Domestic staying visitors are those people who are on their holiday or short break and staying within the AONB area.

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 2.7 people. A total of £283.19 was spent per party or £104.88 per head per overnight trip. The spend per person per night is £24.87.

When excluding the visiting friends and relatives market, the spend increases to £393.60 per party, or an average spend per head per overnight trip of £145.78.

Table 15.4: Expenditure Breakdown – UK Overnight	***(147)***
	Total
Accommodation	44%
Eating/drinking out	28%
Shopping	16%
Entertainment	2%
Transport / Fuel	8%
Other	2%

Figure 15.3 - Expenditure - Overnight UK Visitors



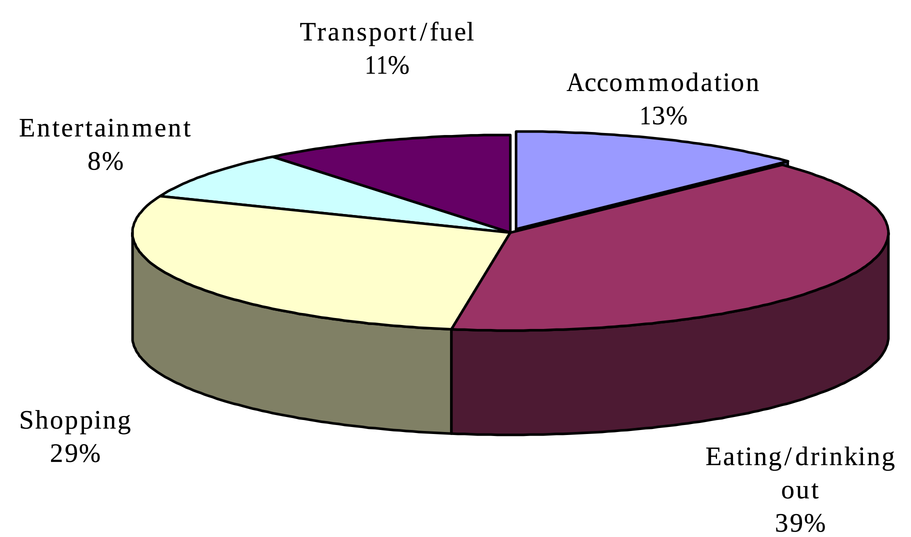
15.05 Overseas Visitors

A total of 6 overseas visitors were included within the AONB sample.

An approximate level of spend can be seen amongst the overseas party sample, with an average party size of 2.0 people - a total of £166.67 spend per party, or £83.33 per head per trip.

Table 15.5: Expenditure Breakdown –Overseas Visitors	*(6)*
	Total
Accommodation	13%
Eating/drinking out	40%
Shopping	29%
Entertainment	8%
Transport / Fuel	11%
Other	0%

Figure 15.4: Expenditure - Overseas Visitors



15.06 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	£37.59 Per Person Per trip
UK Day Visitor	£6.56 Per Person Per Day
UK Touring (staying outside of the district)	£20.84 Per Person Per Trip
UK Overnight - ALL	£104.88 Per Person Per Trip £24.87 Per Person Per Night
Overseas Visitor - ALL	£83.33 Per Person Per Trip £18.52 Per Person Per Night