



# Winchester City Visitor & Resident Survey 2008

Prepared for Eloise Appleby  
Head of Economic & Cultural Services  
Winchester City Council by

TSE Research Services  
40 Chamberlayne Road  
Eastleigh  
SO50 5JH



# Survey objectives

- 1) Provide up to date data on the profile, origin, behaviour, use of facilities and opinions of visitors to help improve understanding of tourism with the district and city**
- 2) Identify trends and benchmark to determine improvement priorities**
- 3) Compare visitor opinions with those of local residents to enable priorities that will benefit resident community as well as visitors**

**Survey part of a national scheme known as Destination Benchmarking**

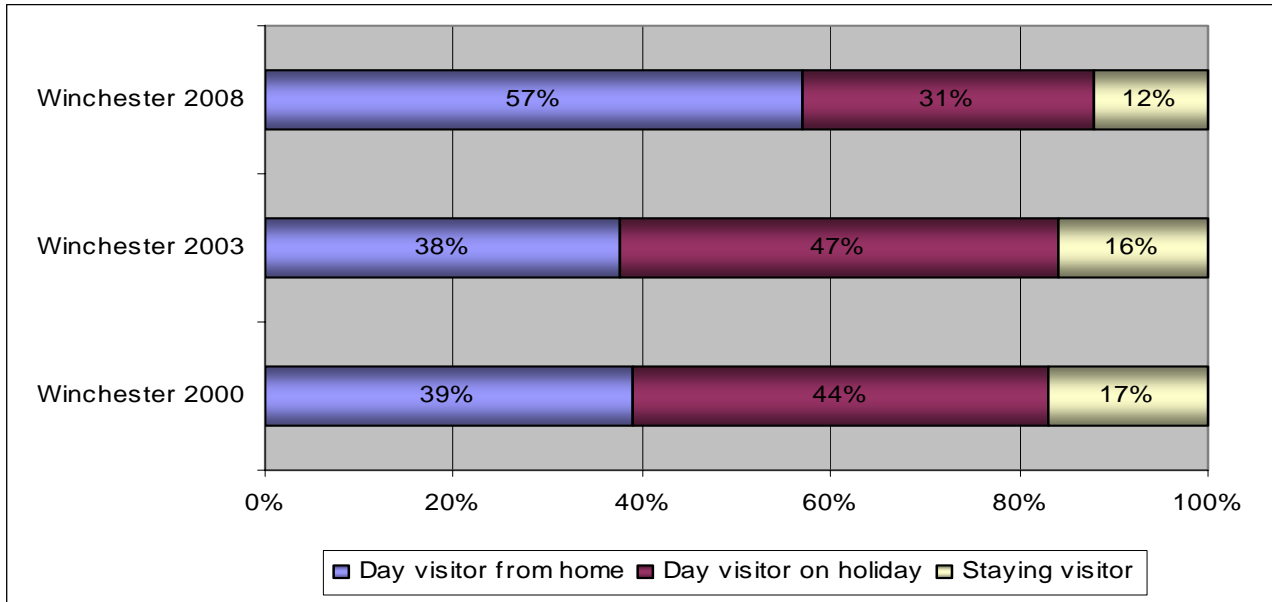


# Survey Methodology

- Random face to face interviews
- 28 interview sessions
- June to October 2008
- Abbey Gardens, Outer Close, TIC
- 
- 401 visitors and 211 city/district residents



# Visitor profile (1)



- 88% are day visitors
- 90% are Brits
- Drop in overnight trips?
- Drop in overseas visitors?

	WINCHESTER 2008	ALL HISTORIC TOWNS	ALL DESTINATIONS
Day visitors	88%	73%	70%
Staying visitors	12%	27%	30%

	2008	2003	2000
Domestic visitors	90%	71%	73%
Overseas visitors	10%	29%	27%





## Visitor profile (2)

- Half of all visitor groups consist of two adults (50%) – only 15% with one or more children
- Proportionately more visitors aged 55 – 64 years (24%)
- 83% visitors in ABC1 socio-economic groups
- 5% of groups included one or more persons with a disability
- 77% repeat visitors



## Resident profile

- 67% city ward residents; 33% rural ward residents
- 49% of residents visited alone – 17% with children
- Proportionately more people aged 16 - 24 years (21%)
- 85% classified as from ABC1 households
- 5% of groups included one or more persons with a disability



## Purpose of visit

	Visitor	Resident
Holiday/Leisure	67%	39%
VFR	11%	3%
Shopping trip (special/ non-regular)	10%	15%
Shopping trip (regular/ household)	0%	15%
Business trip	4%	0%
Work/ study here	0%	21%
Other	8%	7%
Total	100%	100%

The majority of visitors described trip as a holiday or leisure (67%)

'Leisure' also popular among residents (39%)



## Travel behaviour (1)

- 65% of visitors travelled to city centre by private car
- Residents (many of whom reside in city centre wards) were most likely to have walked in to the city centre (54%). A third travelled by car
- 74% of car using visitors and 55% of car using residents used city centre car parks during visit
- Overall, 44% of visitors and 47% of residents used a long-stay car park, 34% of visitors and 32% of residents used a short-stay car park
- 15% of visitors and 8% of residents used the park & ride facility





## Travel behaviour (2)

- All residents were aware of parking facilities in the city prior to visit – knowledge gained from previous trips into the centre
- By contrast, 70% of visitors to the city who travelled by car and used city centre car parks indicated that they were aware of parking facilities in the city prior to their visit
- 83% of these visitors were aware of car parking facilities from knowledge gained through visiting the city before. 6% gained information from the Council's web pages



# Attractions visited

## *Top five attractions*

	Visitor	Resident
Winchester Cathedral (grounds)	84%	63%
Shops	74%	77%
Eateries/ restaurants	65%	31%
Winchester Cathedral (inside)	38%	11%
Abbey Gardens	23%	17%

- The most popular attraction for visitors was the Cathedral grounds (84%). 38% of visitors had been inside the Cathedral during their visit. The shops were the second most popular attraction (74%), followed by restaurants and eateries (65%)
- The most popular attractions for local residents were the shops (77%), followed by the cathedral grounds (63%). A third had visited restaurants/eateries



## Information sources prior trip

- Given majority repeat visitors, 50% did not consult any source prior to trip
- 16% searched the internet for information
- 8% used the Winchester Pocket Guide
- 6% used the Winchester Visitor Guide
- 6% contacted the TIC



## Visitor expenditure

- Staying visitor avg. spend £89.59, well above the avg. for 'all historic towns' (£64.14) and 'all destinations' (£63.43), mainly due to relatively high avg. spend on commercial accommodation
- Avg. spend on eating out, entertainment and travel were below the avg. for 'all historic towns' and 'all destinations'. Only spend on shopping exceeded the benchmarking avg.
- Avg. day visitor spend at £16.92 was well below the avg. for 'all historic towns' (£25.61) and 'all destinations' (£25.38)
- Survey found a shortening in length of stay which will reduce the overall expenditure generated by visitors in the local area. Staying visitors down to avg. 3.57 from 7.63 nights in 2003 (5.19 nights in all destinations). Day visitors stay avg. 4.36 hours – slightly shorter than other destinations (avg. 4.82 hrs)





## Visitor and resident ratings (1)

- Relatively high scores from visitors on most areas reviewed. Highest satisfaction scores given to general atmosphere, feeling of welcome, TIC, and the upkeep of parks and open spaces. Less satisfaction among visitors with parking costs, toilets, and choice of nightlife
- 89% of visitors said enjoyment was 'high' or 'very high'; 97% 'likely' or 'very likely' to recommend a visit to a friend
- The aspects rated most highly by residents included - the general atmosphere (4.39), the design and appearance of parks and open spaces (4.38), the ease of travel into Winchester (4.36), the cleanliness and maintenance of parks and open spaces (4.35) and the range of places to eat & drink (4.35)



## Visitor and resident ratings (2)

- Residents tended to score many aspects less highly than visitors. Lower scores from residents for - cost of parking (2.75) the range of shops (3.07), the overall parking experience (3.15), the choice of nightlife/ evening entertainment (3.32) and the availability and cleanliness of public toilets (3.37 and 3.38 respectively)
- 83% of visitors tended to agree that Winchester City was not too overcrowded, resulting in an avg score of 3.96 out of 5.00. Residents were a little less inclined to agree with the statement resulting in a score of 3.57
- 93% of visitors 'agreed' or 'strongly agreed' with the statement 'I felt quite safe from crime in Winchester city', resulting in an avg score of 4.22 out of 5.00, a marked improvement compared with 2003. Residents gave a lower score of 3.80



## Areas for further consideration

- Scope for improvement in parking and public conveniences
- Increase volume of staying visitors - overnight tourism market higher in value than day market – current commercial accommodation capacity may need to be reviewed
- Consumers increasingly using internet for travel information – review online marketing to reach new audiences
- Unlikely to see increase in length of stay – short breaks the growing trend – especially among domestic holiday-makers dubbed the new ‘staycators’ – attract more high value short stay trips
- Need to increase visiting among younger age group (30+)