

Cheltenham Christmas Survey 2021

Final Report

Produced for and on behalf of Marketing Cheltenham by
The South West Research Company Ltd.

May 2022



**VISIT
CHELTENHAM**
THE FESTIVAL
TOWN



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Cheltenham Christmas Survey 2021

Key Findings & Conclusions

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Key Findings

This report presents the findings of an online survey amongst visitors to Cheltenham over the Christmas period between the 18th November 2021 to the 2nd January 2022. It was commissioned by Marketing Cheltenham and undertaken by The South West Research Company Ltd. Marketing Cheltenham (Cheltenham Borough Council) and Cheltenham Business Improvement District wished to commission the survey to better understand the profile of visitors to Cheltenham, their trip behaviours and their economic impact in particular relation to key events over the 2021 Christmas period when investment was made in a significantly enhanced Christmas offering in the town including a new Christmas Market and Christmas Ice Rink.

In order to evaluate the impact of this enhanced Christmas offer (and these specific investments in particular) in terms of visitation, satisfaction levels and spend, they commissioned the visitor survey to capture this learning and to help inform their future plans and interventions going forward. The survey was conducted online using Marketing Cheltenham's direct email database (c. 20,000 known visitors to the town) which included many people who had visited the Cheltenham Ice Rink, along with promoting the survey link on their high-profile social media channels. An email containing the survey link was sent out by Marketing Cheltenham to their database from the 25th January and promoted on their social media channels and the survey remained live until Sunday 13th February 2022. A total of 649 useable online survey responses were submitted by the closing date including 628 respondents who had visited Cheltenham during the Christmas period 2021. 21 respondents had not visited the town during this period and these respondents were re-directed to a question within the survey asking why this was the case.

The key findings from the research are as follows:

Estimating the economic impact

- Overall, 43,600 visits were made to the Ice Rink and an estimated 237,700 visits to the Christmas Market. More than one visit was made to the Ice Rink by 24% of people and 61% of visitors to the Christmas Market visited on more than one occasion.
- Of the total visiting either the Ice Rink and/or the Christmas Market 105,100 visits were influenced to visit the town by the presence of one or more of the attractions (36,200 Ice Rink and 68,900 Christmas Market visitors).
- Residents/people working in Cheltenham accounted for 69% of influenced visits (72,500 visits), day visitors to the town accounted for 28% of influenced visits (29,400 visits) and staying visitors 3% of influenced visits (3,200 visits).
- A total of £14m spend was associated with all visits to either the Ice Rink or Market. This is all spend in Cheltenham connected to those attending either the Ice Rink and/or the Christmas Market. So spend at either of the attractions and elsewhere in Cheltenham for all visitor types and including the full length of stay in the city for staying visitors.
- A total of £3.3m of this spend was estimated to be additional and only occurred due to the presence of either the Ice Rink or the Market.
- Local business turnover as a result of the total additional associated spending at the market was estimated at approximately £4.3m.

Key Findings

Visitor profile

- 60% of all survey respondents were aged 35-54 years including 32% aged 35-44 years and 28% aged 45-54 years. 16% were aged 25-34 years and 8% in each case were aged 16-24 years or 55-64 years. Just 6% were aged 65+ years.
- 79% of all survey respondents were female and 19% were male.
- 100% of survey respondents were UK residents. 69% of these lived in Cheltenham itself and a further 22% lived elsewhere in the wider South West region. 8% of all survey respondents were UK residents who lived elsewhere outside the South West region.
- 83% of all visitors were in paid employed/self employed. 8% were retired, 3% were in full-time education and 2% were at home/with children. 1% were unemployed/redundant.
- Based on the occupation of the chief income earner in their household, the largest proportion of visitors were classified in the highest, AB, socio economic group (47%) followed by 28% categorised as C1's. The proportion classified as C2s was 14% and DEs 11%.
- 48% of visitors had visited Cheltenham as part of an immediate family group (husband/wife/partner/children) whilst 25% had done so as part of a couple (husband/wife/partner). 21% had visited as part of a mixed group of family and friends and 16% in each case as a group of friends and/or an extended family group (grandparents/other relatives). 11% had visited the town alone, 3% as part of another group type and 1% as part of an educational group.
- 69% of respondents had visited Cheltenham over the Christmas period with children in their party. 31% had done so in an adult only group.
- The average group size was 4.78 people (1.87 children and 2.91 adults).

Characteristics of visits

- 69% of respondents who had visited Cheltenham over the Christmas period were local residents of Cheltenham or working in the town. 28% were visiting for the day from their own homes and 3% were staying overnight in Cheltenham away from their own homes.
- The average duration of stay in Cheltenham amongst staying visitors was 2.59 nights.
- 98% of all visitors were on a repeat visit to Cheltenham and just 2% were first time visitors to the town.
- The average dwell time in Cheltenham during a visit over the Christmas period was calculated at 3.86 hours for all visitors equating to 3 hours 52 minutes.
- 85% of all respondents had visited Cheltenham Ice Rink and a slightly lower proportion, 69%, had visited the Christmas Market. 1% of all respondents had not visited either of these.

Key Findings

Characteristics of visits continued

- 76% of all those visiting Cheltenham Ice Rink had done so just once over the Christmas period. 24% had visited the Ice Rink 2 or more times.
- 39% of all those visiting the Christmas Market had done so just once over the Christmas period. 61% had visited the Christmas Market 2 or more times.
- 83% of all those who had visited Cheltenham Ice Rink during their visit to the town said it had been the main reason for their visit compared with 29% who said the same for the Christmas Market.
- Those respondents who had not visited the Ice Rink were asked whether there was any particular reason why they didn't visit the Ice Rink during their visit to the town. A wide range of different responses were provided with not being able to skate/not liking ice skating being the main factor mentioned along with some respondents who mentioned Covid-19 and a lack of time during their visit.
- Those respondents who had not visited the Christmas Market were asked whether there was any particular reason why they didn't visit the Christmas Market during their visit to the town. A wide range of different responses were provided with a lack of time/being too busy being the main factor mentioned along with some respondents who mentioned the Christmas Market had finished/was not on, it being too crowded/busy and not of interest to them.
- 9% of all respondents said visiting the Ice Rink or Christmas Market was not the main reason for their visit to Cheltenham. 24% of these respondents said they were visiting as part of a special shopping trip and 18% as part of a regular/ household shopping trip. 15% said they worked or studied in the city, 9% were visiting friend or relatives and 5% as part of a leisure/holiday trip.
- 69% of visitors indicated that they had been eating/drinking out during their visit to Cheltenham whilst 68% had been shopping in the town outside of the Ice Rink/Christmas Market. 39% had socialised/met with their friends or relatives whilst visiting Cheltenham. Less than 10% of visitors in each case had watched the pantomime, attended the Christmas lights switch on, been sightseeing/visiting attractions or gone to the races (9%, 8%, 7% and 4% respectively).
- Car/van etc. (68%) was the most popular form of transport used to travel to Cheltenham. A further 6% of visitors also travelled by road on a scheduled bus service (6%). Around a quarter of visitors had walked from home, 2% had arrived on the train, 2% by bicycle and 1% by another method of transport.
- 55% of respondents who had arrived in the city by car/van etc. had used a town centre car park. 4% had used the park and ride and 42% said they had not used either a town centre car park or the park and ride.
- 90% had visited The Promenade and Montpellier area, 75% the High Street area, 29% The Suffolks, Tivoli and Bath Road area and 28% the Pittville area.

Key Findings

Marketing

- 20% of visitors were prompted to visit Cheltenham from a previous visit and/or 19% from Visit Cheltenham social media e.g. Facebook/Twitter/Instagram etc. 11% had been recommended to visit the town and the same proportion were prompted to visit via the www.visitcheltenham.com website. 10% had seen other/general social media posts about visiting Cheltenham and 6% had seen some form of online advertising for the town. 2% had received an E-Newsletter from Visit Cheltenham and 1% in each case had been prompted to visit from another website(s), a magazine/brochure article, an article in the local paper or from a poster.
- Overall recall was highest for the main Christmas campaign art work for Cheltenham with 75% recognising it. This was followed by 67% who recognised the www.visitcheltenham.com/christmas page on the website and 30% who recognised the Cheltenham Christmas video image.
- In terms of influence on the decision to visit, this was highest amongst those respondents who recalled the video (56% influenced to visit as a result of seeing the video) followed by the Christmas page on the www.visitcheltenham.com website (36% influenced to visit after seeing it) and lastly the main campaign art work which influenced 33% of those who had seen it to visit Cheltenham.

Visitor expenditure

- All visitors attending the ice ring spent an average of £9.94 per person, with all visitors attending the Christmas Market spending an average of £9.25 per person.
- All visitors spend elsewhere in Cheltenham was £34.74 per person.
- Staying visitors spent a further £42.65 per person per night on their accommodation.

Visitors' opinions – Ice Rink

- With the exception of having 'space to skate', on the whole visitor satisfaction levels with each of the aspects of their experience of going ice skating whilst in Cheltenham over the Christmas period were good to very good. 4 of the 10 indicators explored by the survey about the Ice Rink received an average score of 4.04 or more. The highest average scores were for the location of the Ice Rink (4.58), ease of booking (4.43), ease of access (4.42) and overall enjoyment of visit (4.04).
- 6 indicators received an average score of less than 4.00 with space to skate receiving the lowest satisfaction score at 3.16 followed by COVID safety measures (3.61), quality of skates and equipment (3.84), quality of the ice (3.86), welcome and customer service provided by staff (3.89) and overall atmosphere (3.93).

Key Findings

Visitors' opinions – Christmas Market

- On the whole visitor satisfaction levels with each of the aspects of their experience of going to Cheltenham Christmas Market were good to very good. 4 of the 11 indicators explored by the survey about the Christmas Market received an average score of 4.14 or more. The highest average scores were for the ease of access (4.32), location of the Christmas Market (4.30), customer service provided by the stall holders (4.19) and site decoration, lighting etc. (4.14).
- 7 indicators received an average score of less than 4.00 with the range of stalls receiving the lowest satisfaction score at 3.45 followed by range of catering stalls (3.66), quality of goods and products on sale (3.72), quality of catering stalls (3.76), COVID safety measures (3.81), overall enjoyment of visit (3.87) and overall atmosphere (3.90).

Visitors' opinions – Cheltenham overall

- With the exception of the value for money of car parking and the availability of public toilets, on the whole visitor satisfaction levels with each of the aspects of their experience of visiting Cheltenham over the Christmas period were good to very good. 7 of the 13 indicators explored by the survey about visiting the town overall received an average score of 4.02 or more. The highest average scores were for the range and quality of the places to eat and drink (4.56 and 4.53 respectively), overall enjoyment of visit (4.29), general atmosphere (4.27), quality of the shopping environment (4.19), range of shops (4.18) and ease of getting to Cheltenham (4.02).
- 6 indicators received an average score of less than 4.00 with the value for money of car parking and the availability of public toilets receiving the lowest satisfaction scores at 2.86 and 2.88 respectively followed by the cleanliness of the public toilets (3.26), availability of car parking and uniqueness of the shopping environment (3.71 each) and the cleanliness of the streets (3.84).
- Cheltenham achieved a recommendation score of +46% amongst all visitors.
- 59% of all visitors to Cheltenham over the Christmas period 2021 said they had considered visiting (25%) or had visited (34%) other destinations over the same period.
- Those respondents who had considered visiting other destination(s) only were asked if they chose to visit Cheltenham in direct preference to this/these other destination(s). 60% said they had. A wide range of town and cities destinations had been considered, along with attractions and other activities. Gloucester, Bristol, Bath and Birmingham were the main destination responses named.

Key Findings

Non-visitors (due to the low sample size the results to follow in this section should be interpreted with caution)

- 3% of all respondents who took part in the online survey said they had not visited Cheltenham over the Christmas period 2021 (21 respondents).
- When asked why they had not visited, 29% in each case said it was too far from their home/accommodation and/or that they will visit again in the future having been to the town before (6 respondents in each case). 24% said it was because of the Covid-19 pandemic (5 respondents). 10% in each case said they went to other destination(s) instead, they had a lack of money/available finances, they were not interested and/or they lacked their own transport to travel to Cheltenham (2 respondents in each case).
- The other destination(s) visited instead were Gloucester, Hereford, Worcester (1 respondent) and the Malvern Winter Glow (1 respondent). Both the respondents who said they had visited these other destinations said they had chosen them in direct preference to Cheltenham.

Conclusions

It's hard to draw too many conclusions from this first year of an enhanced Christmas product in Cheltenham town centre with the events taking place during a Covid affected period and, in particular, when a new variant of the infection was on the rise in the UK. It's likely that this would have changed many peoples plans and habits in the run up to Christmas and, as such, the visitor profile could have seen far more visitors from further afield than it did during 2021. Until such time as a normal year occurs we won't know how true a reflection the visitor profile witnessed in 2021 actually is and whilst the findings of this study suggest that the Ice Rink and Market largely just attracted the local residents, a normal year could well see increased staying and day visitor numbers naturally without the need for them to be actively targeted more than they were in 2021.

What is clear from the survey findings is that both the Ice Rink and the Christmas Market were a success in influencing visits and new money into the town centre during the Christmas period during challenging times and as such they both had a positive impact.

The feedback on both attractions from survey respondents certainly suggests that they were well received and by and large well run, providing quality additions to the Christmas experience in the town. Visitor satisfaction was healthy across most of the factors tested although as always there is room for improvement and the findings of this report should be used in the planning for future years to improve not only the Ice Rink and Christmas Market, but also those aspects of the town centre generally for which satisfaction was lowest.

It is recommended that future research into the Christmas offering in the town will allow for any initiatives implemented as a result of this report to be monitored to ensure any additional monies invested are wisely spent. It's also important to see how the visitor profile changes in the future when there are no restrictions in place in the UK to truly gauge the impact of such offerings, test the success of marketing and establish the 'normal' economic impact levels that could be achieved.

Cheltenham Christmas Survey 2021

Introduction

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Background & methodology

This report presents the findings of an online survey amongst visitors to Cheltenham over the Christmas period between the 18th November 2021 to the 2nd January 2022. It was commissioned by Marketing Cheltenham and undertaken by The South West Research Company Ltd.

Marketing Cheltenham (Cheltenham Borough Council) and Cheltenham Business Improvement District wished to commission the survey to better understand the profile of visitors to Cheltenham, their trip behaviours and their economic impact in particular relation to key events over the 2021 Christmas period. In response to the Covid-19 pandemic and continued efforts to support the town's economic recovery, Cheltenham Borough Council (via its Marketing Cheltenham department) and Cheltenham Business Improvement District collectively invested in a significantly enhanced Christmas offering in Cheltenham in 2021 including a new Christmas Market and Christmas Ice Rink.

In order to evaluate the impact of this enhanced Christmas offer (and these specific investments in particular) in terms of visitation, satisfaction levels and spend, they commissioned the visitor survey to capture this learning and to help inform their future plans and interventions going forward.

The survey was conducted online using Marketing Cheltenham's direct email database (c. 20,000 known visitors to the town) which included many people who had visited the Cheltenham Ice Rink, along with promoting the survey link on their high-profile social media channels.

An email containing the survey link was sent out by Marketing Cheltenham to their database from the 25th January and promoted on their social media channels and the survey remained live until Sunday 13th February 2022.

A total of 649 useable online survey responses were submitted by the closing date including 628 respondents who had visited Cheltenham during the Christmas period 2021. 21 respondents had not visited the town during this period and these respondents were re-directed to a question within the survey asking why this was the case.

The main results in the pages to follow are therefore based on the sample of 628 respondents who had visited Cheltenham over the Christmas period 2021 between the 18th November 2021 to the 2nd January 2022.

Research objectives

The key objectives of the survey were as follows:

- To provide a profile of visitors to Cheltenham town centre in the lead up to and over the 2021 Christmas period.
- To highlight principle drivers relating to these visits to Cheltenham.
- To understand the decision-making process, including alternative consideration sets, and information sources pre and during the trip.
- To explore visit/trip characteristics, including transport use and activities undertaken.
- To measure effectiveness of current marketing activities.
- To identify satisfaction levels and service/product gaps.
- To measure the economic impact of visitors over the Christmas period and the influence/attribution to key events (Christmas Market, Christmas Ice Rink).

For the purposes of the research and analysis, in the pages to follow the sample of respondents visiting Cheltenham over the Christmas period 2021 have been categorised into the following categories:

- **Residents** – local residents of Cheltenham or those who work in the town– a total sample of 431 respondents.
- **Non-residents** – visitors to Cheltenham who lived outside the town and who were visiting for the day (176 respondents) or as part of an overnight staying trip staying overnight in the town (21 respondents) – a total sample of 197 respondents.

The results to follow in this report refer to the total 628 respondents who had visited Cheltenham over the Christmas period 2021 cross-tabulated by the residents/non-residents segments as detailed above where valuable and useful to do so in the report for the purposes of interpreting the survey findings.



CHELTENHAM
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Cheltenham Christmas Survey 2021

Estimating Economic Impact

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Approximately 105,000 visits to Cheltenham were influenced by the Ice Rink and/or Christmas Market

- Overall, 43,600 visits were made to the Ice Rink and an estimated 237,700 visits to the Christmas Market. The term visits is used rather than people as a person could visit on more than one occasion. Indeed, more than one visit was made to the Ice Rink by 24% of people and 61% of visitors to the Christmas Market visited on more than one occasion. These figures are estimated from local data provided for Ice Rink ticket sales, Cheltenham town centre footfall data, population and transportation usage in the town alongside survey data.
- Of the total visiting either the Ice Rink and/or the Christmas Market 105,100 visits were influenced to visit the town by the presence of one or more of the attractions (36,200 Ice Rink and 68,900 Christmas Market visitors).
- Residents/people working in Cheltenham accounted for 69% of influenced visits (72,500 visits), day visitors to the town accounted for 28% of visits (29,400 visits) and staying visitors 3% of visits (3,200 visits). Staying visitors stayed for an average of 2.59 nights in the town.

Attendee counts by type	Ice Rink visitors	Ice Rink main reason for visit to Cheltenham	Christmas Market visitors	Christmas Market main reason for visit to Cheltenham	Combined main reason (Ice Rink and/or Christmas Market)
All visitors	43,600	36,200	237,700	68,900	105,100
Resident/work in Cheltenham	30,100	24,900	164,000	47,600	72,500
Staying visitor	1,300	1,100	7,100	2,100	3,200
Day visitor	12,200	10,100	66,500	19,300	29,400

Estimating the economic impact of the market

- To establish the additional monies brought into the local economy through the Ice Rink or Christmas Market, the face to face and online visitor surveys asked respondents if the Ice Rink or Christmas Market were the main reason for their choosing to visit Cheltenham.
- This report looks at visitor expenditure on two levels as shown below;
- **All associated spend** – This is all spend connected to those attending either the Ice Rink and/or the Christmas Market. So spend at either attraction and also away from them in the wider Cheltenham area for all visitor types and including the full length of stay in the town for staying visitors.
- **All additional associated spend** – This is all spend connected to those attending the market for whom the Ice Rink and/or Christmas Market was the main reason for their staying trip to Cheltenham or the main reason for their day visit to the town – these are classed as influenced visitors. This covers all spend at either attraction and also away from them in the wider Cheltenham area for all influenced visitor types and including the full length of stay in the town for influenced staying visitors.
- Further economic outputs contained within this chapter for business turnover and employment supported by visitor spend have been estimated using multipliers from the Cambridge Model.
- The Cambridge Model is a computer-based model developed to calculate estimates of the volume, value and economic impact of tourism on a County or District basis. It utilises a standard methodology capable of application throughout the UK and therefore offers the potential for direct comparisons with similar destinations throughout the country. The approach was the subject of independent validation (R.Vaughan, Bournemouth University) in December 1994. The Model was judged robust and the margins of error acceptable and in line with other modelling techniques.
- The multipliers used for this economic evaluation are the same as those used to calculate Cheltenham data for their Value of Tourism report in 2019 which was the last year unaffected by the Covid-19 pandemic and considered as normal trading conditions (for further details of the Cambridge Model see Appendix 3).

Estimating the economic impact of the market

- Further economic outputs contained within this chapter for business turnover and employment supported by visitor spend refer to the following terms which are explained below;

Total business turnover	Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending
Direct employment	Employment arising as a direct result of visitor expenditure
Indirect employment	Employment arising from the purchase of supplies and services by those in receipt of direct visitor expenditure
Induced Employment	Income induced employment arises from expenditure by employees whose jobs are supported by tourism spend
FTE's	Full time equivalent jobs

£14m was spent by all those visiting the Ice Rink or Market

All associated spend

- The spend figures contained within this section relate to the total number of visits to the Ice Rink or Christmas Market, whether influenced to visit by the presence of the attractions or not. This is all spend in Cheltenham connected to those attending either the Ice Rink and/or the Christmas Market. So spend at either of the attractions and elsewhere in Cheltenham for all visitor types and including the full length of stay in the city for staying visitors.

ALL ASSOCIATED SPEND	Ice Rink	Christmas Market	Shopping	Food & Drink	Entertainment	Travel & Transport	Total Excl. accommodation	Accommodation	TOTAL INCL. ACCOMM.
All visitors	£433,000	£2,199,000	£4,936,000	£4,294,000	£610,000	£580,000	£13,050,000	£932,000	£13,982,000
Resident/work in Cheltenham	£290,000	£1,088,000	£3,231,000	£2,708,000	£261,000	£204,000	£7,782,000	-	£7,782,000
Staying visitor	£19,000	£146,000	£416,000	£585,000	£173,000	£226,000	£1,566,000	£932,000	£2,497,000
Day visitor	£123,000	£964,000	£1,289,000	£1,001,000	£176,000	£150,000	£3,703,000	-	£3,703,000

£3.3m additional spend in Cheltenham occurred as a result of the Ice Rink or Market

All additional associated spend

- The spend figures contained within this section relate to the total number of the total number of visits to the Ice Rink or Christmas Market, that were influenced by the presence of the attractions in the town. This is all influenced spend connected to those attending either the Ice Rink and/or the Christmas Market. So spend at either of the attractions and elsewhere in Cheltenham for all influenced visitor types and including the full length of stay in the city for influenced staying visitors.

ALL ASSOCIATED SPEND	Ice Rink	Christmas Market	Shopping	Food & Drink	Entertainment	Travel & Transport	Total Excl. accommodation	Accommodation	TOTAL INCL. ACCOMM.
All visitors	£198,000	£442,000	£1,033,000	£928,000	£161,000	£165,000	£2,928,000	£348,000	£3,276,000
Resident/work in Cheltenham	£79,000	£108,000	£397,000	£335,000	£32,000	£25,000	£976,000	-	£976,000
Staying visitor	£16,000	£44,000	£155,000	£219,000	£64,000	£84,000	£583,000	£348,000	£931,000
Day visitor	£102,000	£290,000	£480,000	£375,000	£65,000	£56,000	£1,368,000	-	£1,368,000

Estimating business turnover & employment

In order to estimate the total business turnover and employment supported as a result of the Ice Rink and Christmas Market taking place in the town it was necessary to re-align the previous spend categories with those used within The Cambridge Model as shown in the tables below. A number of adjustments and assumptions were made including:

- The re-aligned Retail category includes 'Other shopping' spend plus 50% of the Christmas Market spend which is assumed to have been spent on goods.
- The re-aligned 'Catering' category includes 'Food & Drink' spend plus 50% of the Christmas Market spend which is assumed to have been spent on food and drink.
- The re-aligned 'Attractions' category includes 'Attractions and Entertainment' spend plus all Ice Rink spend.
- The day visitor spend category consists of all day visitor spending plus 33% of residents spend which is assumed to be additional with the remainder likely to have been displaced from elsewhere in the town.
- Based upon previous research it is assumed that 40% of travel and transport spend will take place at the origin of the trip rather than at the destination

ALL ASSOCIATED SPEND – CAMBRIDGE MODEL GROUPINGS	ACCOMMODATION	RETAIL	CATERING	ATTRACTIONS	TRANSPORT	TOTAL
Staying	£932,000	£489,000	£658,000	£192,000	£226,000	£2,497,000
Day	£0	£5,546,000	£4,735,000	£850,000	£354,000	£11,485,000
TOTAL ASSOCIATED SPEND	£932,000	£6,035,000	£5,393,000	£1,043,000	£580,000	£13,982,000

ALL ADDITIONAL ASSOCIATED SPEND - CAMBRIDGE MODEL GROUPINGS	ACCOMMODATION	RETAIL	CATERING	ATTRACTIONS	TRANSPORT	TOTAL
Staying	£348,000	£177,000	£241,000	£80,000	£84,000	£931,000
Day	£0	£1,077,000	£909,000	£279,000	£81,000	£2,345,000
TOTAL ADDITIONAL ASSOCIATED SPEND	£348,000	£1,254,000	£1,150,000	£359,000	£165,000	£3,276,000

Local business turnover as a result of the total additional associated spending at the market was estimated at approximately £4.3m

LOCAL BUSINESS TURNOVER SUPPORTED BY VISITOR SPENDING		
	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	£13,750,000	£3,210,000
Supplier & income induced	£4,295,000	£1,054,000
Total	£18,045,000	£4,264,000

EMPLOYMENT SUPPORTED BY VISITOR SPENDING		
Full time equivalent	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	124	30
Indirect	46	11
Induced	21	5
Total	191	46
Estimated actual	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	184	44
Indirect	52	13
Induced	24	6
Total	260	63

Cheltenham Christmas Survey 2021

Visitor Profile

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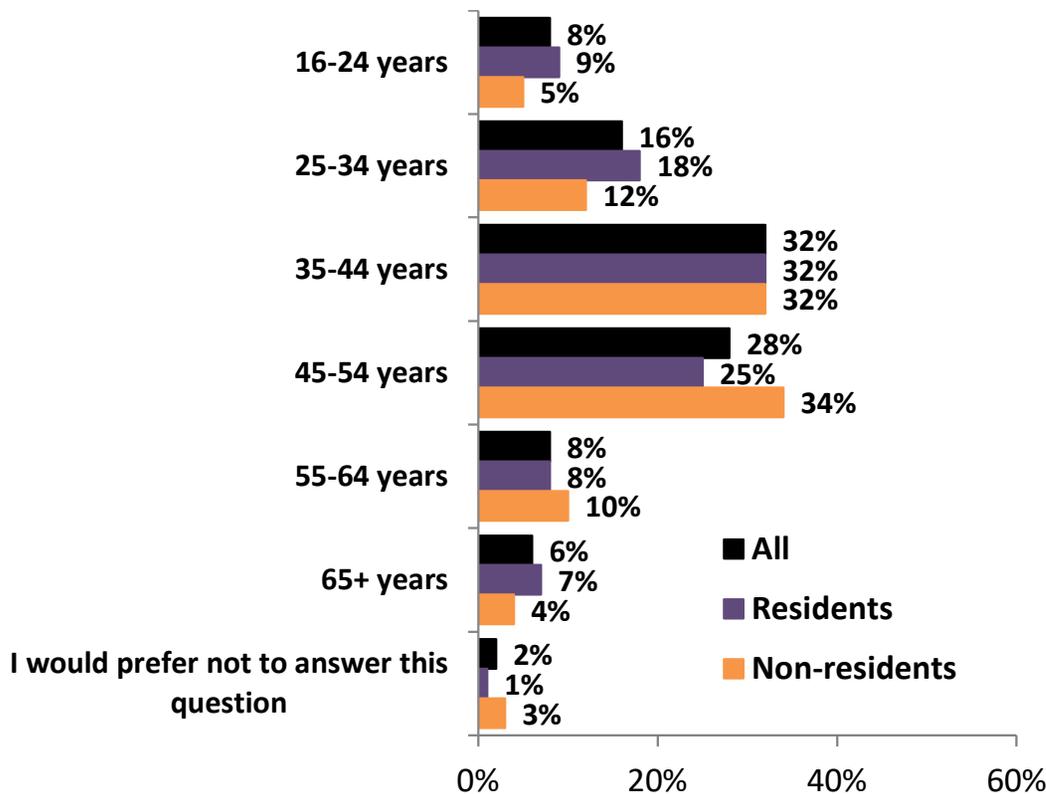
The largest proportion of survey respondents were aged 35 – 44 years. 79% were female.

60% of all survey respondents were aged 35-54 years including 32% aged 35-44 years and 28% aged 45-54 years. 16% were aged 25-34 years and 8% in each case were aged 16-24 years or 55-64 years. Just 6% were aged 65+ years. 2% preferred not to answer the question.

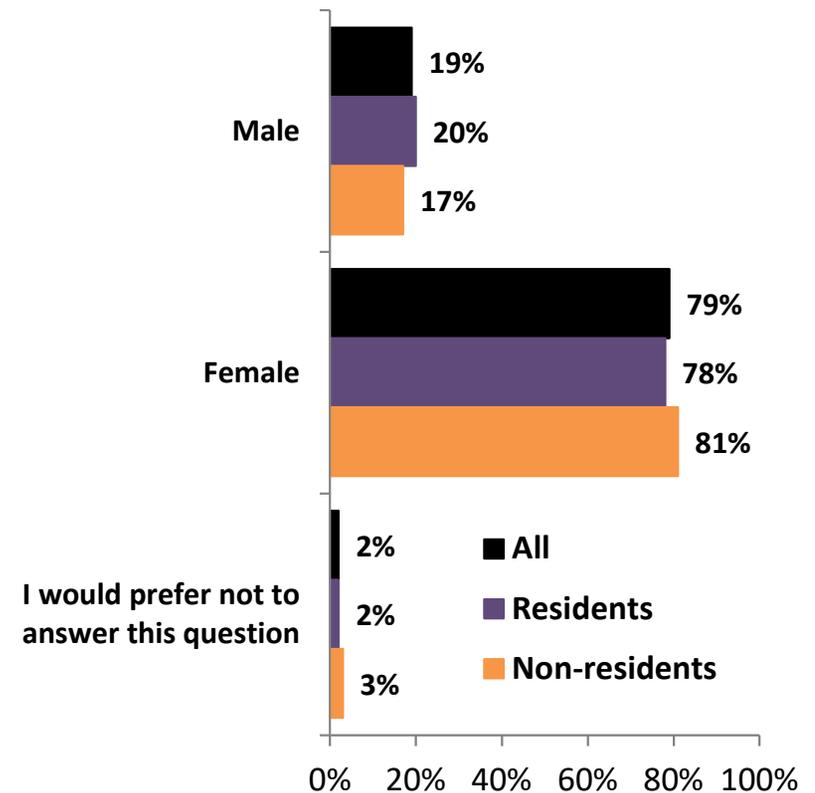
Non-residents had a slightly older profile than residents (48% aged 45+ years compared with 40%). 27% of residents were aged under 34 years compared with 17% of non-residents.

79% of all survey respondents were female and 19% were male. There was little variation in the results amongst residents and non-residents.

What age group are you in?



How would you describe your gender?

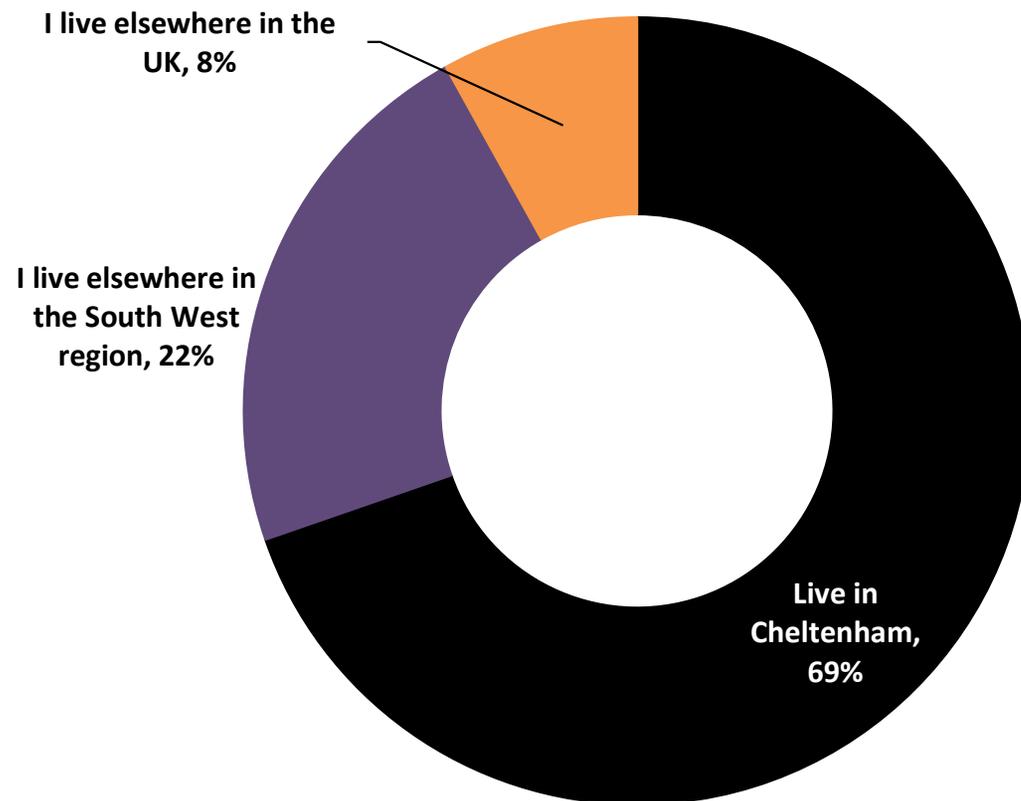


69% of all respondents were Cheltenham residents. 22% lived elsewhere in the South West region and 8% elsewhere in the UK.

100% of survey respondents were UK residents. 69% of these lived in Cheltenham itself and a further 22% lived elsewhere in the wider South West region including 19.81% in who lived in the 'GL' Gloucester and 1.62% in the 'SN' Swindon postcode areas.

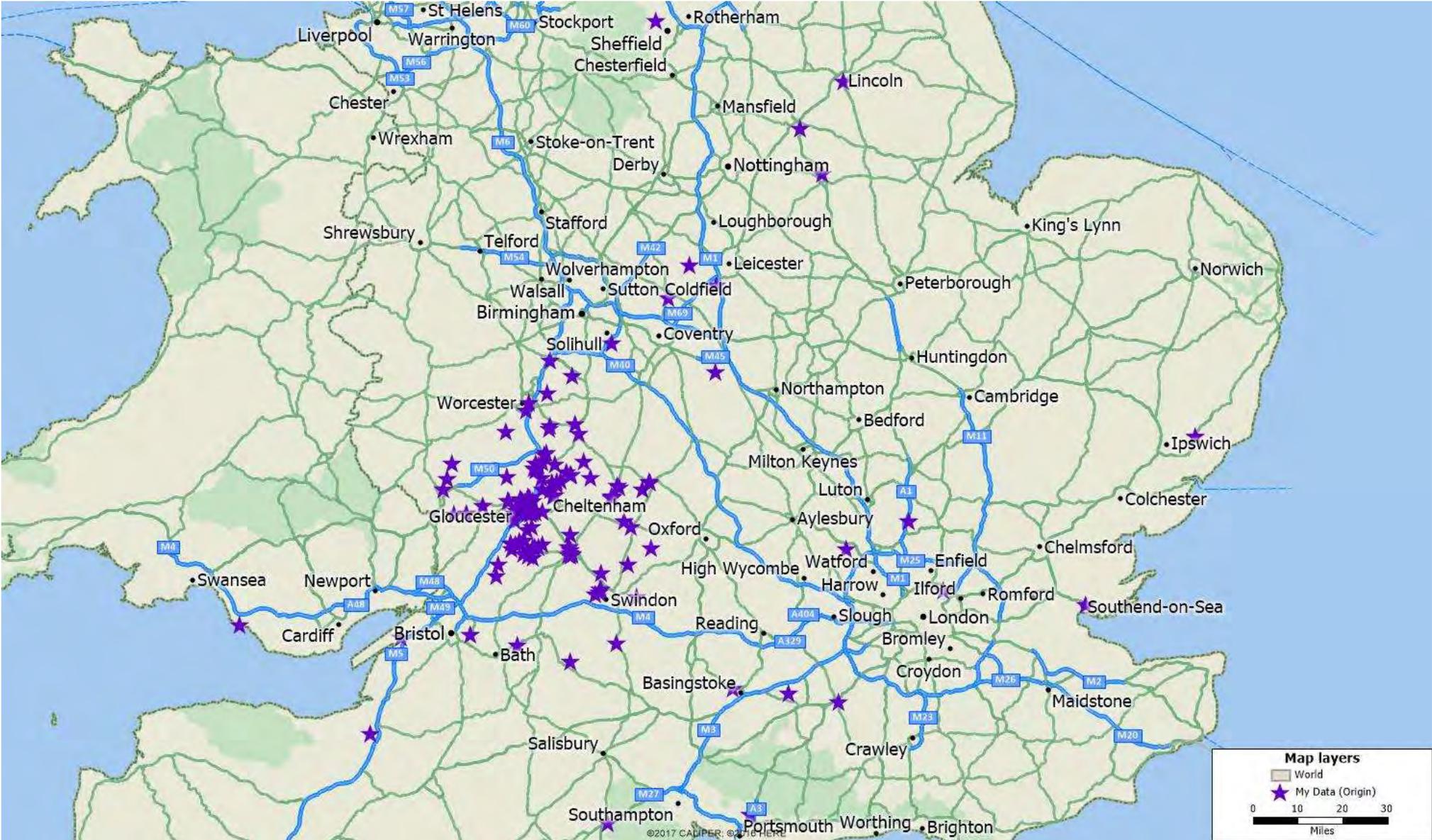
8% of all survey respondents were UK residents who lived elsewhere outside the South West region including 1.79% in the 'WR' Worcester postcode area, 1.14% in the 'OX' Oxford postcode area and 0.65% in each case in the 'B' Birmingham or the 'HR' Hereford postcode areas. The table below shows the postcode areas where 0.65% or more of respondents came from.

Origin of residence



Postal area origin		% of all respondents
GL	Gloucester	19.81%
WR	Worcester	1.79%
SN	Swindon	1.62%
OX	Oxford	1.14%
B	Birmingham	0.65%
HR	Hereford	0.65%

Map showing home postcode locations of visitors to Cheltenham during the Christmas period 2021 excluding local residents.

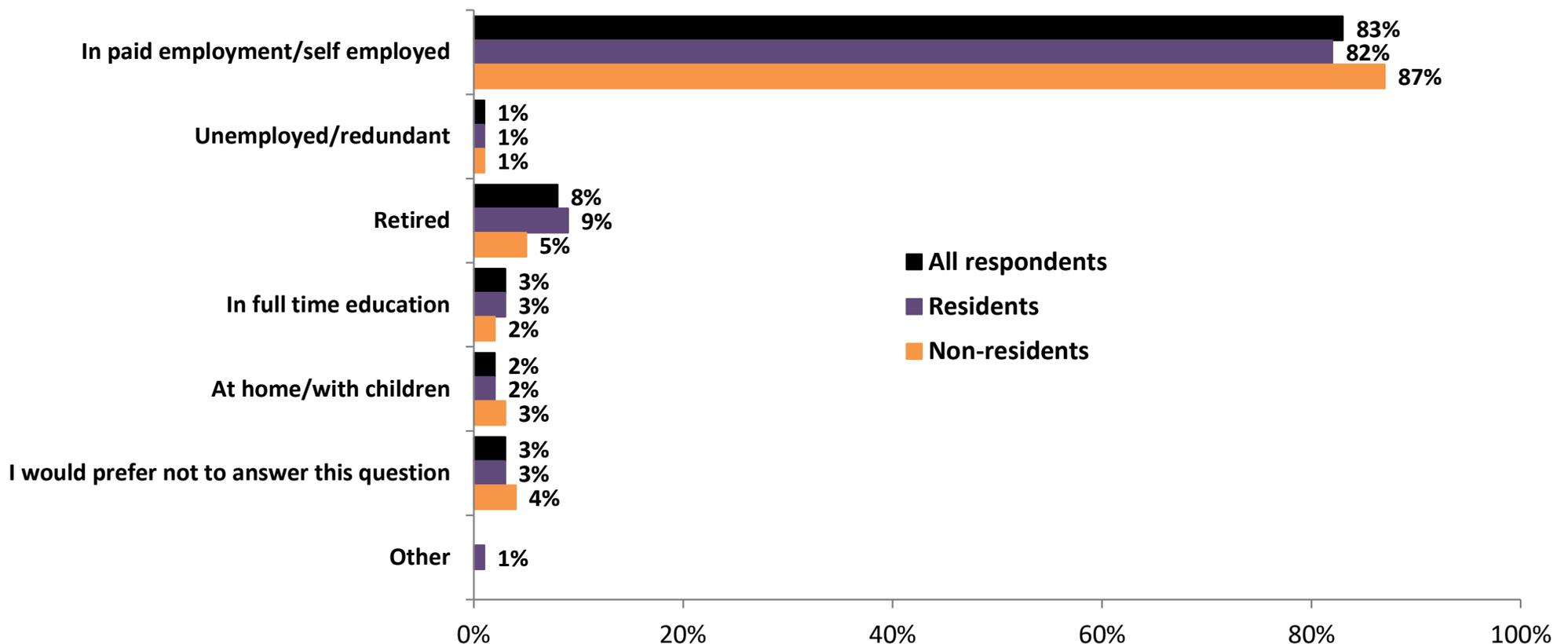


83% of visitors were in paid employment/self employed.

83% of all visitors were in paid employed/self employed. 8% were retired, 3% were in full-time education and 2% were at home/with children. 1% were unemployed/redundant and 3% preferred not to answer the question.

A slightly higher proportion of non-residents were in paid employment/self employed than residents and visitors overall (87% compared with 82% and 83% respectively) and a lower proportion were retired (5% compared with 9% and 8% of residents and visitors overall respectively).

Which of the following categories applies to the chief income earner in your household?

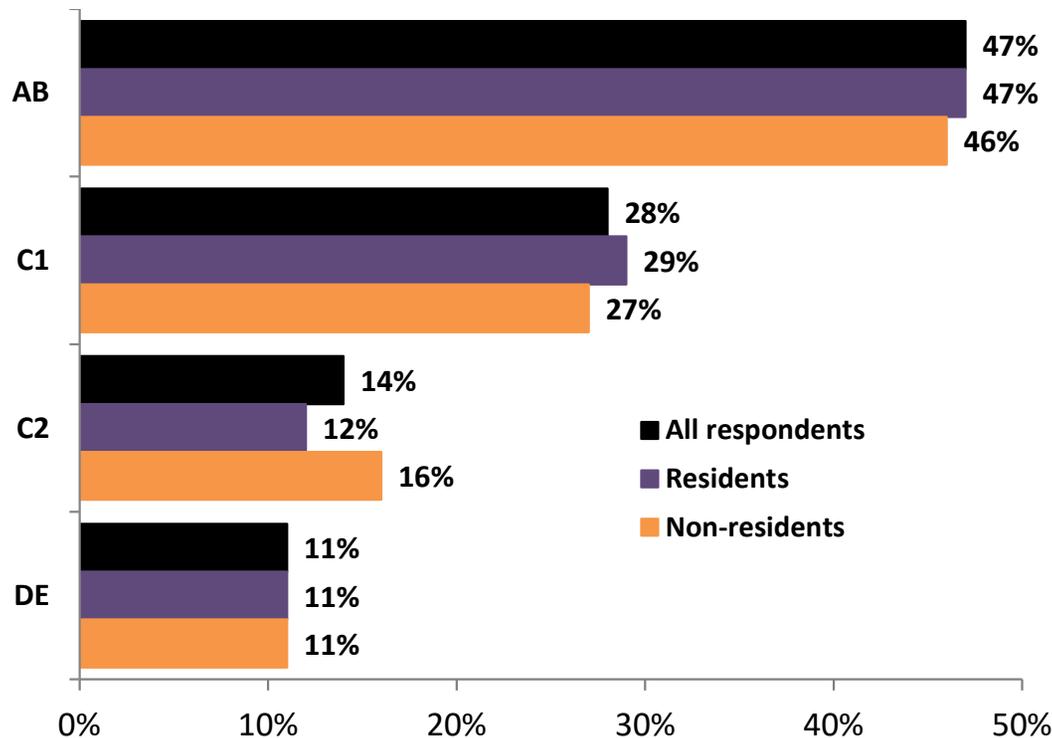


Socio economic group AB accounted for 47% of visitors to Cheltenham.

Based on the occupation of the chief income earner in their household, the largest proportion of visitors were classified in the highest, AB, socio economic group (47%, compared with approximately 22% of the UK population) followed by 28% categorised as C1's, compared with approximately 31% of the UK population. The proportion classified as C2s was 14% and DEs 11% (compared with approximately 21% and 26% of the UK population respectively).

A slightly higher proportion of residents of Cheltenham fell into socio economic group ABC1 (76%) compared with non-residents (73%).

Socio economic grade – based on the occupation of the chief income earner in household?



Social Grade	Description	% HRP population (UK)
AB	Higher & intermediate managerial, administrative, professional occupations	22.17
C1	Supervisory, clerical & junior managerial, administrative, professional occupations	30.84
C2	Skilled manual occupations	20.94
DE	Semi-skilled & unskilled manual occupations, Unemployed and lowest grade occupations	26.05

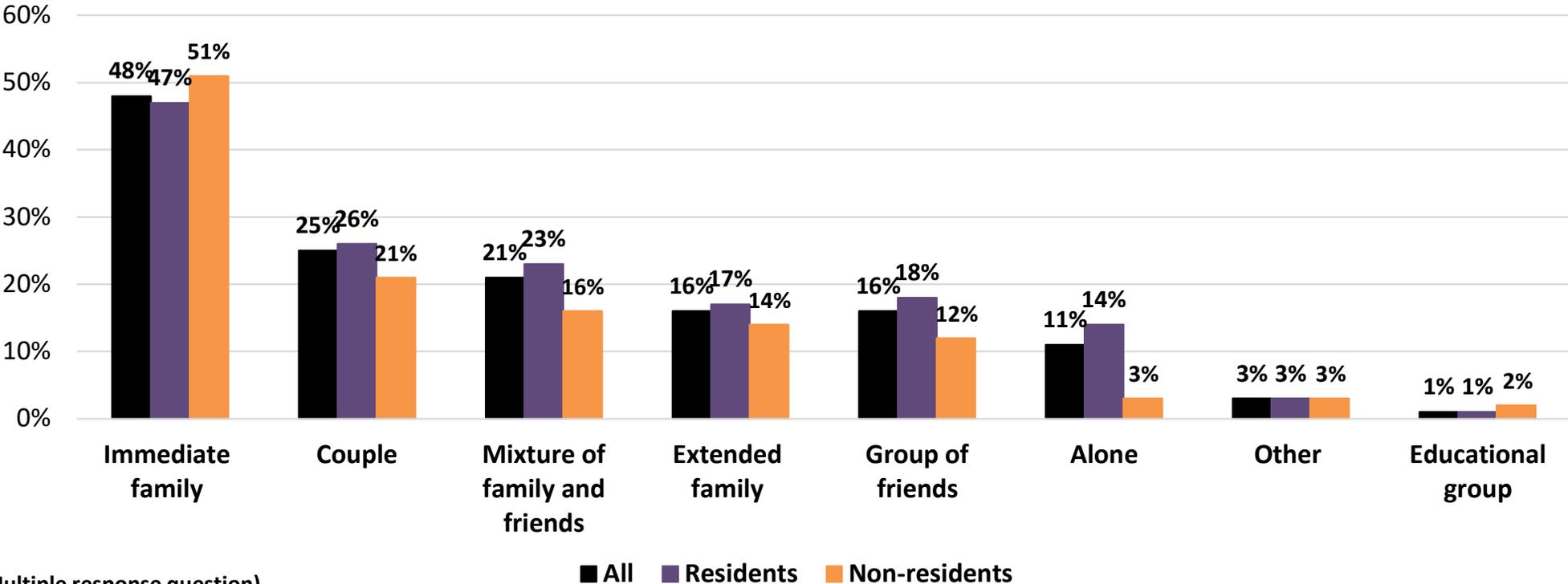
Immediate family groups made up almost half of all visitors.

48% of visitors had visited Cheltenham as part of an immediate family group (husband/wife/partner/children) whilst 25% had done so as part of a couple (husband/wife/partner). 21% had visited as part of a mixed group of family and friends and 16% in each case as a group of friends and/or an extended family group (grandparents/other relatives).

11% had visited the town alone, 3% as part of another group type and 1% as part of an educational group.

Residents were slightly more likely than non-residents to have visited Cheltenham over the Christmas period in a couple or as part of a mixed group of family and friends, as part of an extended family group, with a group of friends or alone.

What sort of group did you visit with?



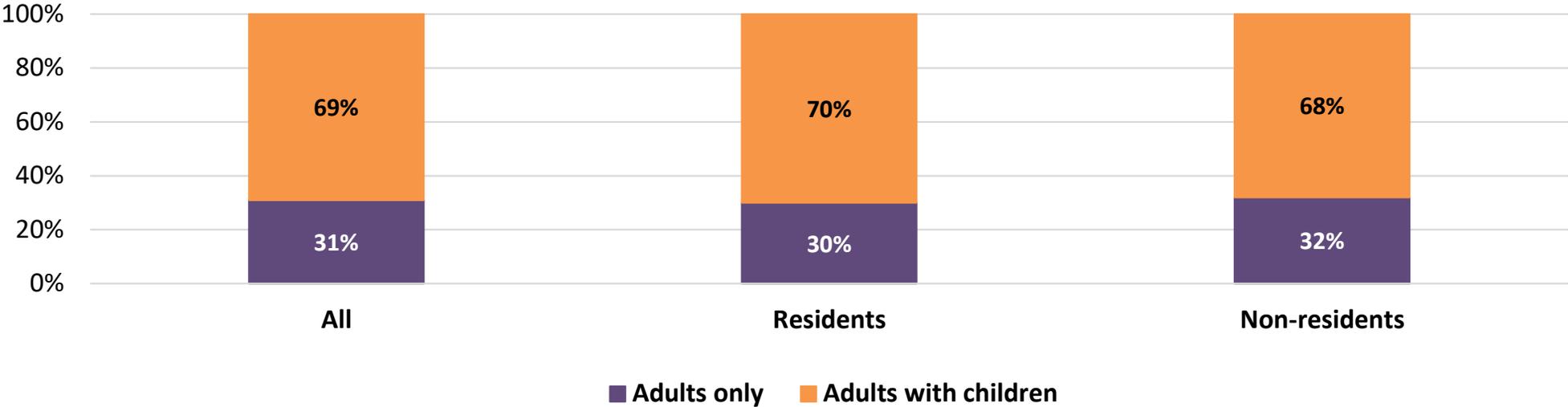
(Multiple response question)

69% of respondents had visited with children. The average group size was 4.78 people.

69% of respondents had visited Cheltenham over the Christmas period with children in their party including 70% of residents and 68% of non-residents. 31% had done so in an adult only group (30% and 32% of residents and non-residents respectively).

The average group size was 4.78 people (1.87 children and 2.91 adults) increasing to 4.95 people amongst residents ((1.95 children and 2.99 adults) and decreasing to 4.47 people amongst non-residents ((1.71 children and 2.75 adults).

Group composition



Average group size	ALL	Residents	Non-residents
Average adults (aged 16+ years)	2.91	2.99	2.75
Average children aged 0-5 years	0.33	0.38	0.24
Average children aged 6-10 years	0.77	0.85	0.61
Average children aged 11-15 years	0.77	0.72	0.86
Average total children	1.87	1.95	1.71
Total average group size	4.78	4.95	4.47

Cheltenham Christmas Survey 2021

Characteristics of Visits

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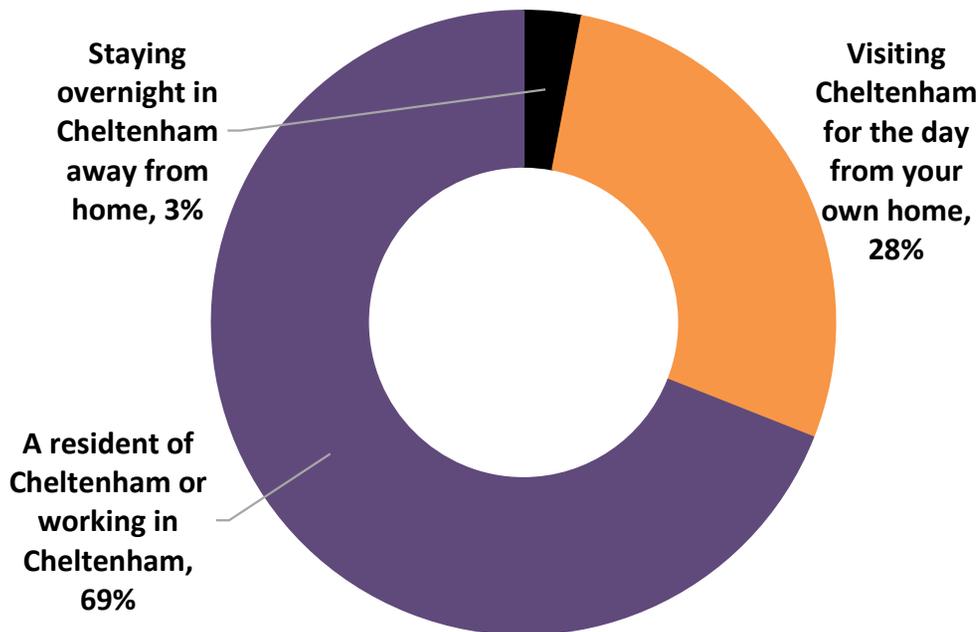
Residents made up the largest proportion of visitors.

69% of respondents who had visited Cheltenham over the Christmas period were local residents of Cheltenham or working in the town. 28% were visiting for the day from their own homes and 3% were staying overnight in Cheltenham away from their own homes. Three respondents were staying overnight outside of Cheltenham away from their own home including one respondent in each case who was staying in Bishops Cleeve, Gloucester and Swindon.

89% of non-residents were visiting the town for the day from their own home, 9% were staying overnight in Cheltenham and just 2% were visiting for the day from a holiday base outside the town.

The average duration of stay in Cheltenham amongst staying visitors was 2.59 nights.

When you visited Cheltenham were you.....?

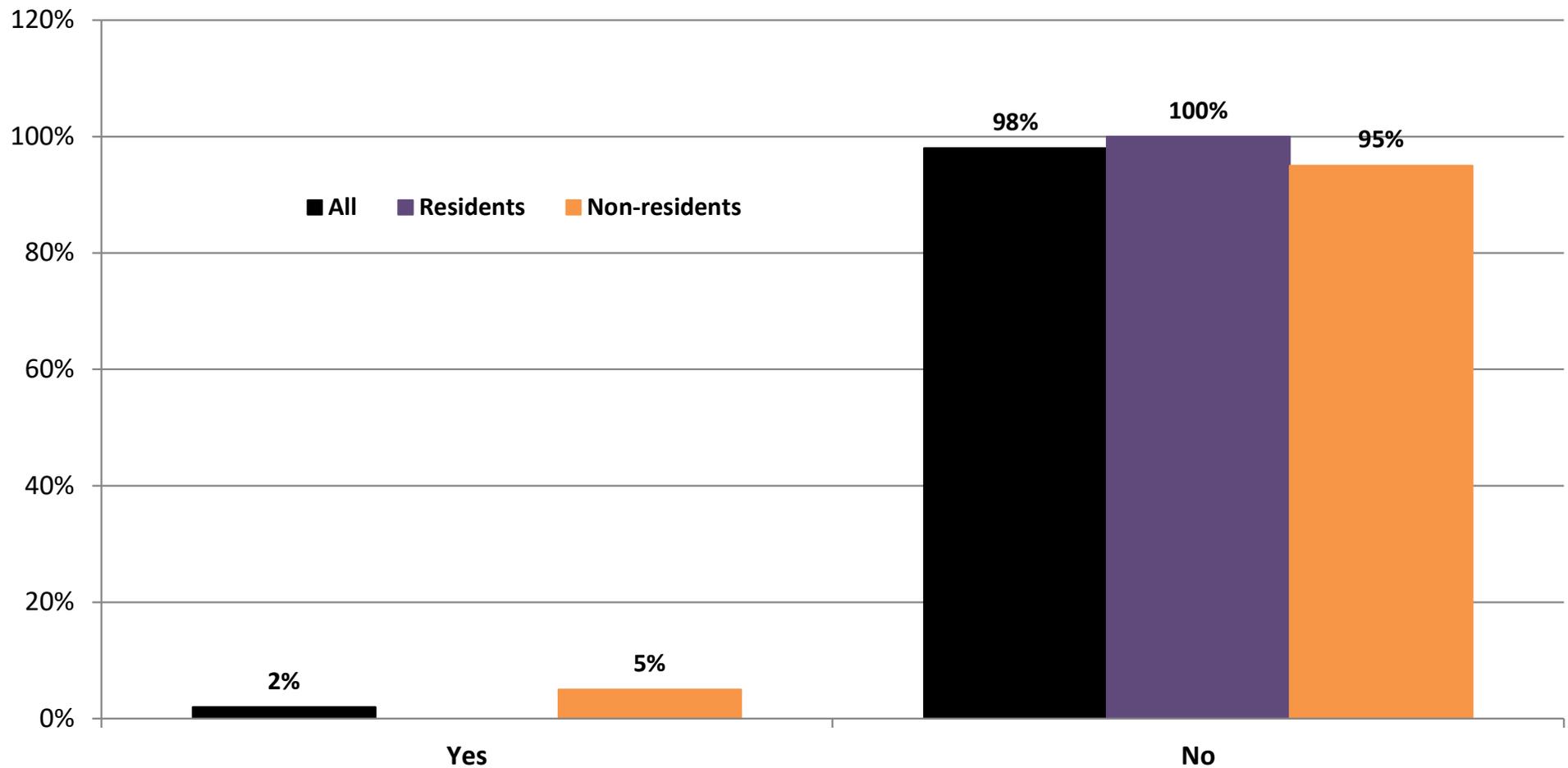


Visitor type	Residents	Non-residents
Staying overnight in Cheltenham away from home	-	9%
Staying overnight outside of Cheltenham away from your own home	-	2%
Visiting Cheltenham for the day from your own home	-	89%
A resident of Cheltenham or working in Cheltenham	100%	-

98% of all visitors had visited Cheltenham before.

98% of all visitors were on a repeat visit to Cheltenham and just 2% were first time visitors to the town including 5% of non-residents.

When you visited Cheltenham was it the first time you had ever visited the town?



Average dwell time in Cheltenham was 3 hours 52 minutes.

When asked how many hours they had spent in Cheltenham during their visit the average dwell time was calculated at 3.86 hours for all visitors equating to 3 hours 52 minutes. This reduced slightly to 3.66 hours for residents (3 hours 40 minutes) and increased slightly to 4.29 hours for non-residents (4 hours 17 minutes).

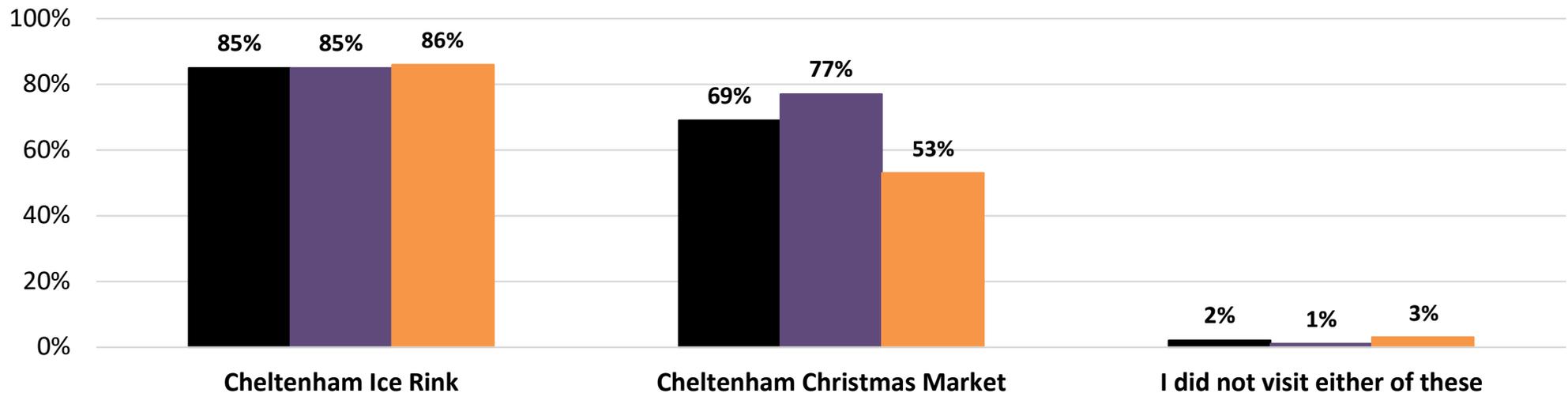
How many hours did you spend in Cheltenham during your visit?	
All	3.86 hours (3 hours 52 minutes)
Residents	3.66 (3 hours 40 minutes)
Non-residents	4.29 (4 hours 17 minutes)

85% of all respondents had visited the Ice Rink and 69% the Christmas Market in Cheltenham.

85% of all respondents had visited Cheltenham Ice Rink over the Christmas period 2021 between Thursday 18th November and Sunday 2nd January 2022 including 85% of residents and 86% of non-residents. A slightly lower proportion, 69%, had visited the Christmas Market including 77% of residents and 53% of non-residents.

1% of all respondents who had visited Cheltenham over the Christmas period 2021 had not visited either the Ice Rink or the Christmas Market including 1% of residents and 3% of non-residents.

Did you visit either of the following taking place in Cheltenham town centre over the Christmas period 2021 between Thursday 18th November 2021 and Sunday 2nd January 2022?



(Multiple response question)

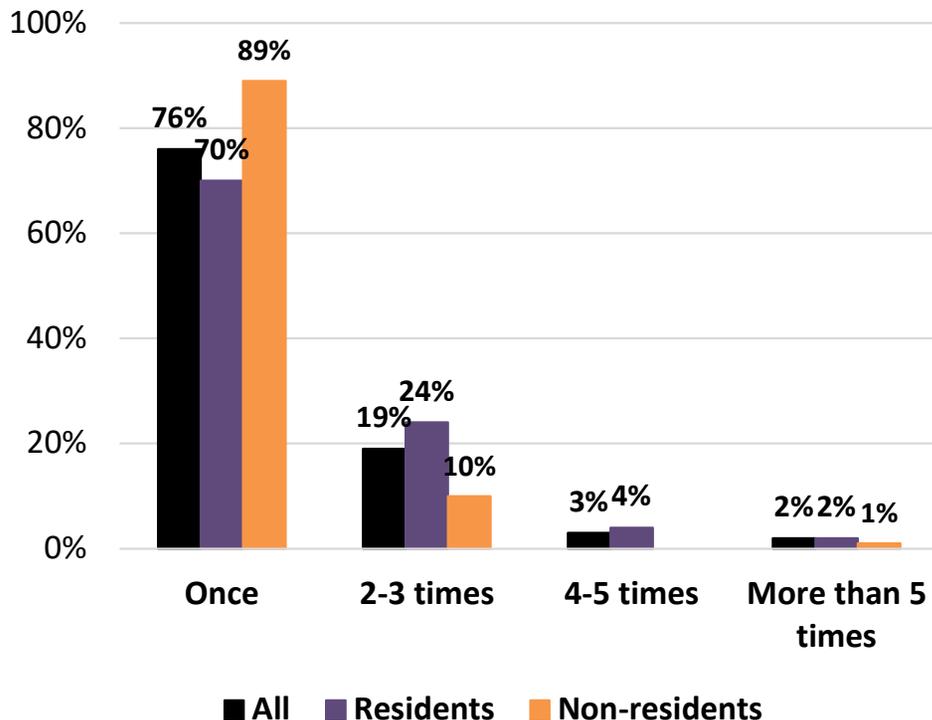
■ All ■ Residents ■ Non-residents

Despite fewer respondents having visited the Christmas Market, those that had done so visited more frequently than those visiting the Ice Rink.

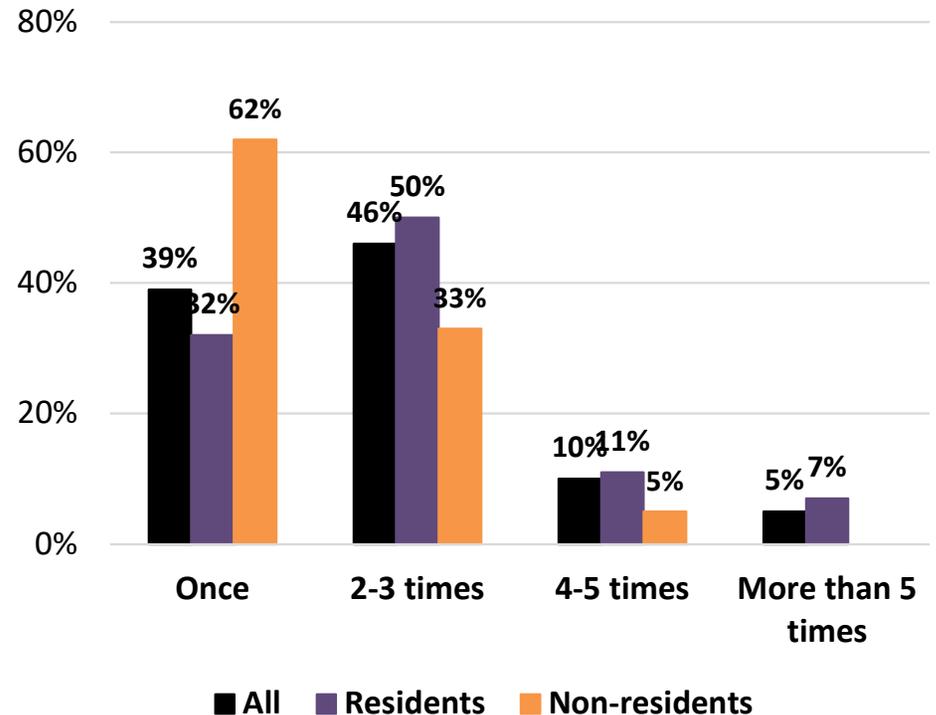
76% of all those who had visited Cheltenham Ice Rink had done so just once over the Christmas period including 70% of residents and 89% of non-residents. 24% had visited the Ice Rink 2 or more times including 30% of residents and just 11% of non-residents.

In contrast, only 39% of those who had visited the Christmas Market had done so just once including 32% of residents and 62% of non-residents and 61% had visited the Christmas Market 2 or more times (69% of residents and 38% of non-residents) including 46% 2-3 times, 10% 4-5 times and 5% more than 5 times.

How many times did you visit the Ice Rink?



How many times did you visit the Christmas Market?

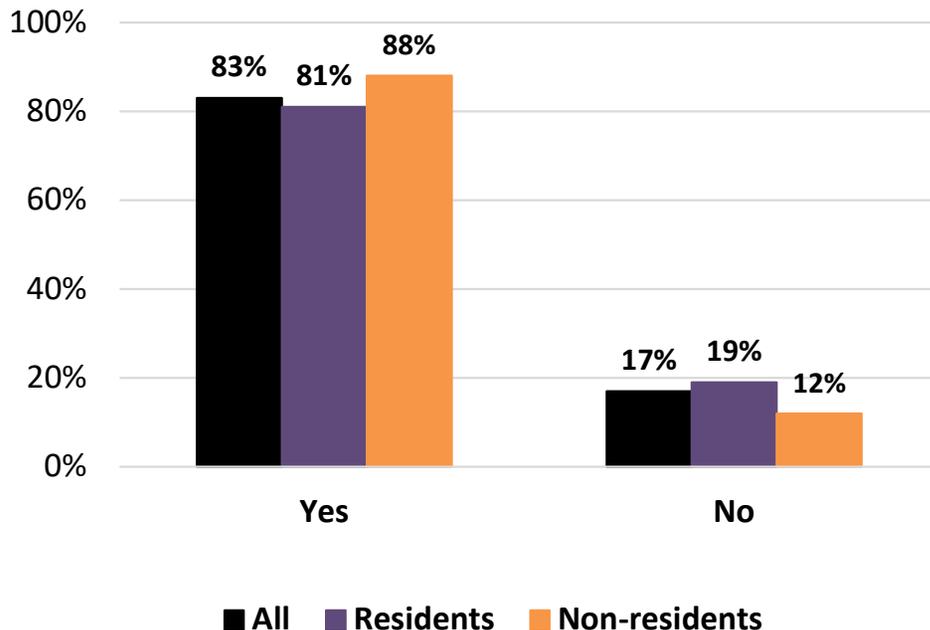


83% of those who had visited the Ice Rink said it was their main reason for visiting the town compared with just 29% who said the same about the Christmas Market.

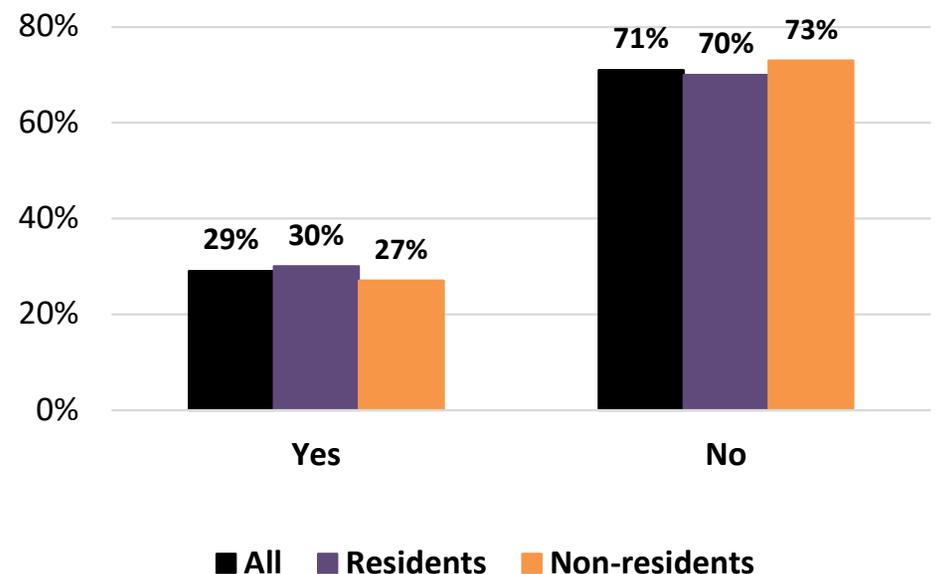
83% of all those who had visited Cheltenham Ice Rink during their visit to the town said it had been the main reason for their visit compared with 29% who said the same for the Christmas Market.

88% of non-residents said the Ice Rink had been the main reason for their visit to Cheltenham compared with 81% of residents and a slightly higher proportion of residents said the Christmas Market had been the main reason for their visit compared with non-residents (30% and 27% respectively).

Was visiting the Ice Rink the MAIN reason for you choosing to visit Cheltenham/come into the town on that occasion?



Was visiting the Christmas Market the MAIN reason for you choosing to visit Cheltenham/come into the town on that occasion?



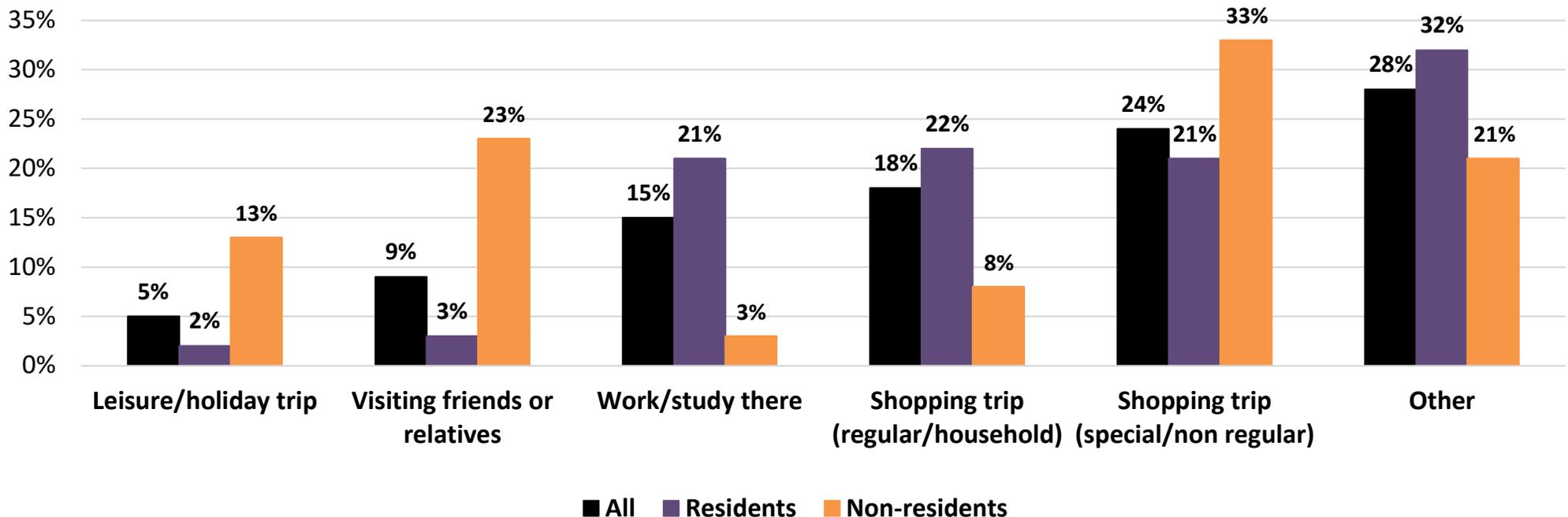
Shopping was the main motivation for those not visiting because of the Ice Rink or Christmas Market.

9% of all respondents said visiting the Ice Rink or Christmas Market was not the main reason for their visit to Cheltenham.

24% of these respondents said they were visiting as part of a special shopping trip (21% and 33% of residents and non-residents respectively) and 18% as part of a regular/ household shopping trip including 22% of residents and 8% of non-residents. 15% said they worked or studied in the city (21% and 3% of residents and non-residents respectively), 9% were visiting friend or relatives (3% and 23% of residents and non-residents respectively) and 5% as part of a leisure/holiday trip including 2% of residents and 13% of non-residents.

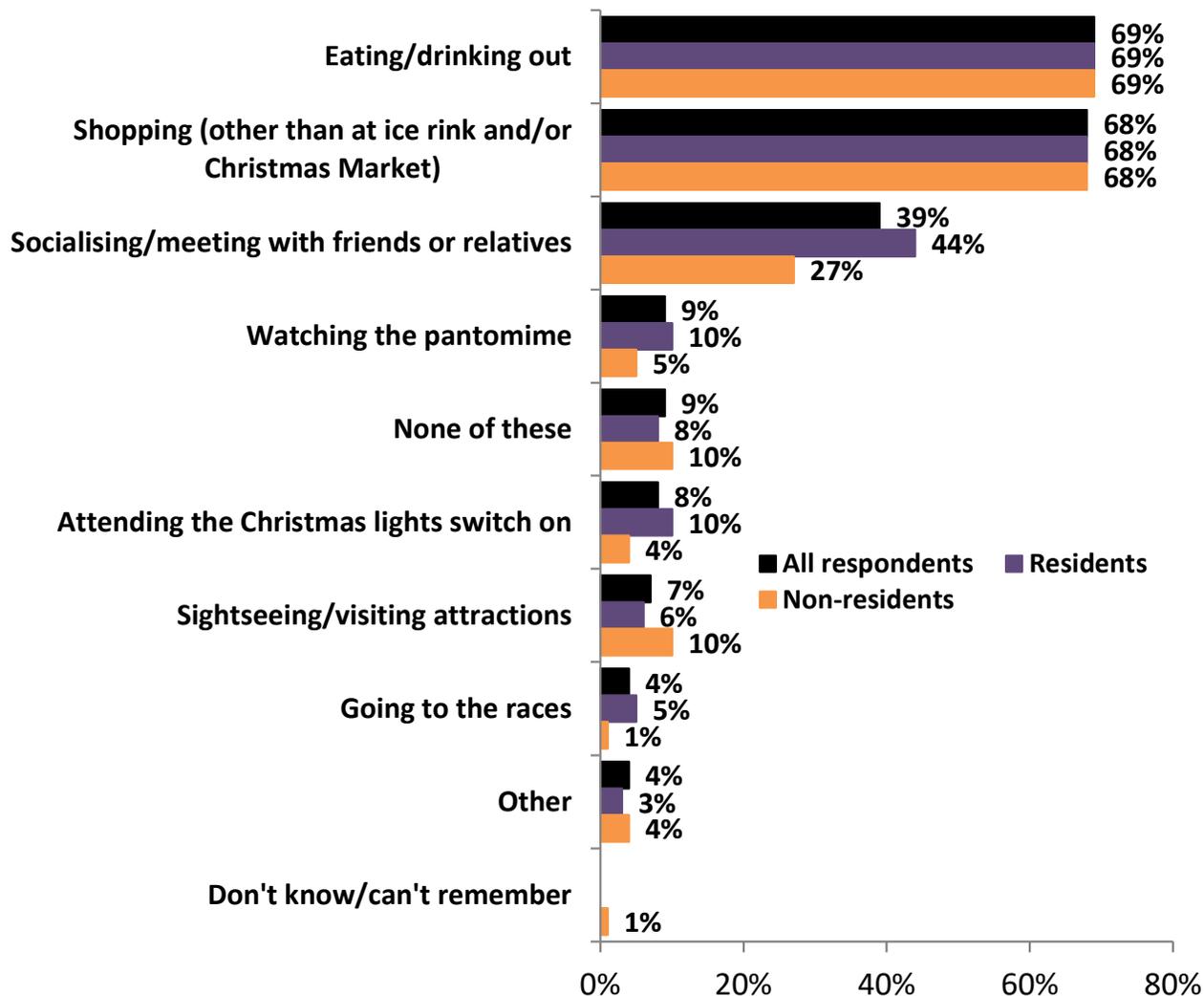
28% of respondents said they were visiting for another reason including the majority saying they are a resident of Cheltenham as well as other regular activities such as going to the bank, hairdressers etc.

What was your MAIN reason for visiting Cheltenham?



69% and 68% of visitors respectively had been eating/drinking out and shopping during their trip to Cheltenham.

Which, if any, of the following activities did you participate in during your visit to Cheltenham?



(Multiple response question)

69% of visitors indicated that they had been eating/drinking out during their visit to Cheltenham (same proportion for residents and non-residents) whilst 68% had been shopping in the town outside of the Ice Rink/Christmas Market (same proportion for residents and non-residents). 39% had socialised/met with their friends or relatives whilst visiting Cheltenham (44% and 27% of residents and non-residents respectively).

Less than 10% of visitors in each case had watched the pantomime, attended the Christmas lights switch on, been sightseeing/visiting attractions or gone to the races (9%, 8%, 7% and 4% respectively) with a higher proportion of residents rather than non-residents taking part in each of these activities with the exception of sightseeing/visiting attractions.

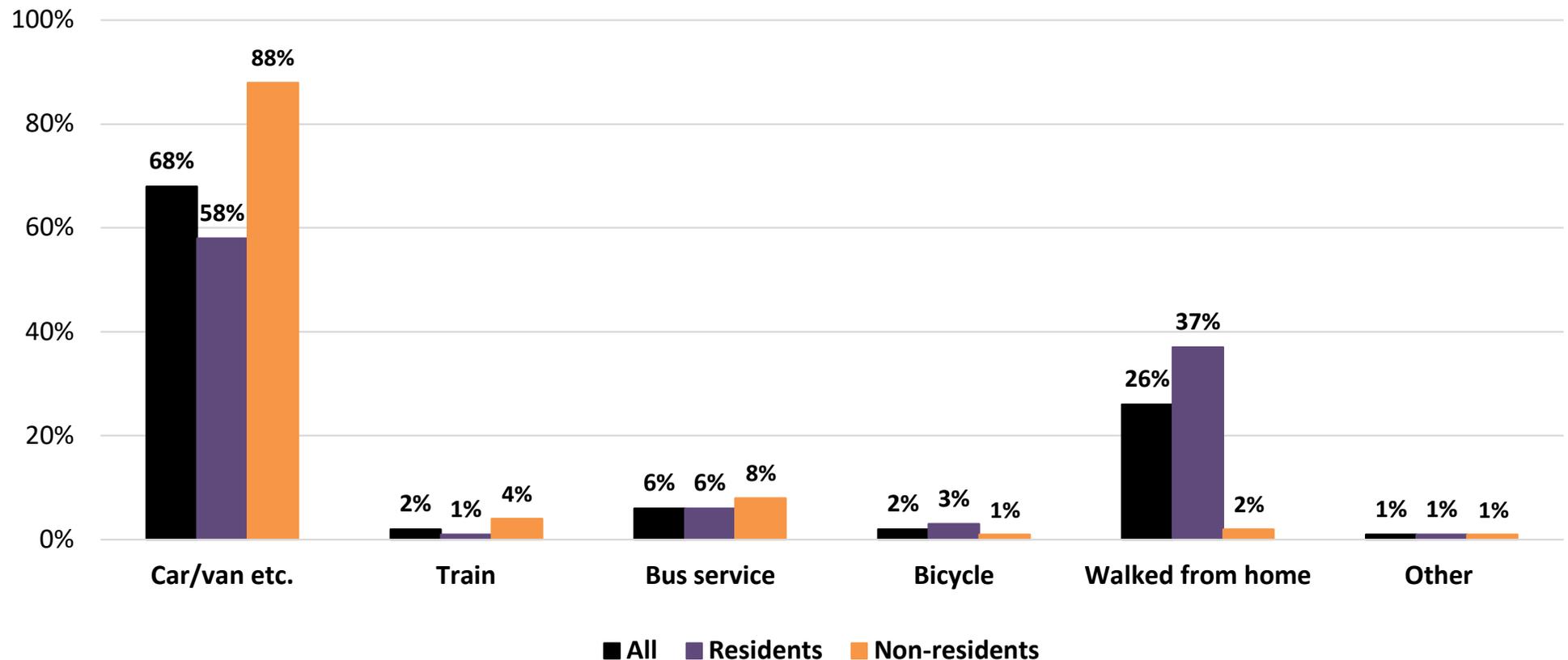
9% of visitors said they hadn't taken part in any of these activities (8% and 10% of residents and non-residents respectively) and 4% said they took part in another activity (3% of residents and 4% of non-residents) including going to the cinema/theatre, regular activities such as going to the bank/hairdressers etc.

Road transport accounted for 74% of visits.

Car/van etc. (68%) was the most popular form of transport used to travel to Cheltenham, including 58% of residents and 88% of non-residents. A further 6% of visitors also travelled by road on a scheduled bus service (6%).

Around a quarter of visitors had walked from home (37% and 2% of residents and non-residents respectively), 2% had arrived on the train (1% and 4% of residents and non-residents respectively), 2% by bicycle (3% and 1% of residents and non-residents respectively) and 1% by another method of transport (1% of residents and non-residents in each case).

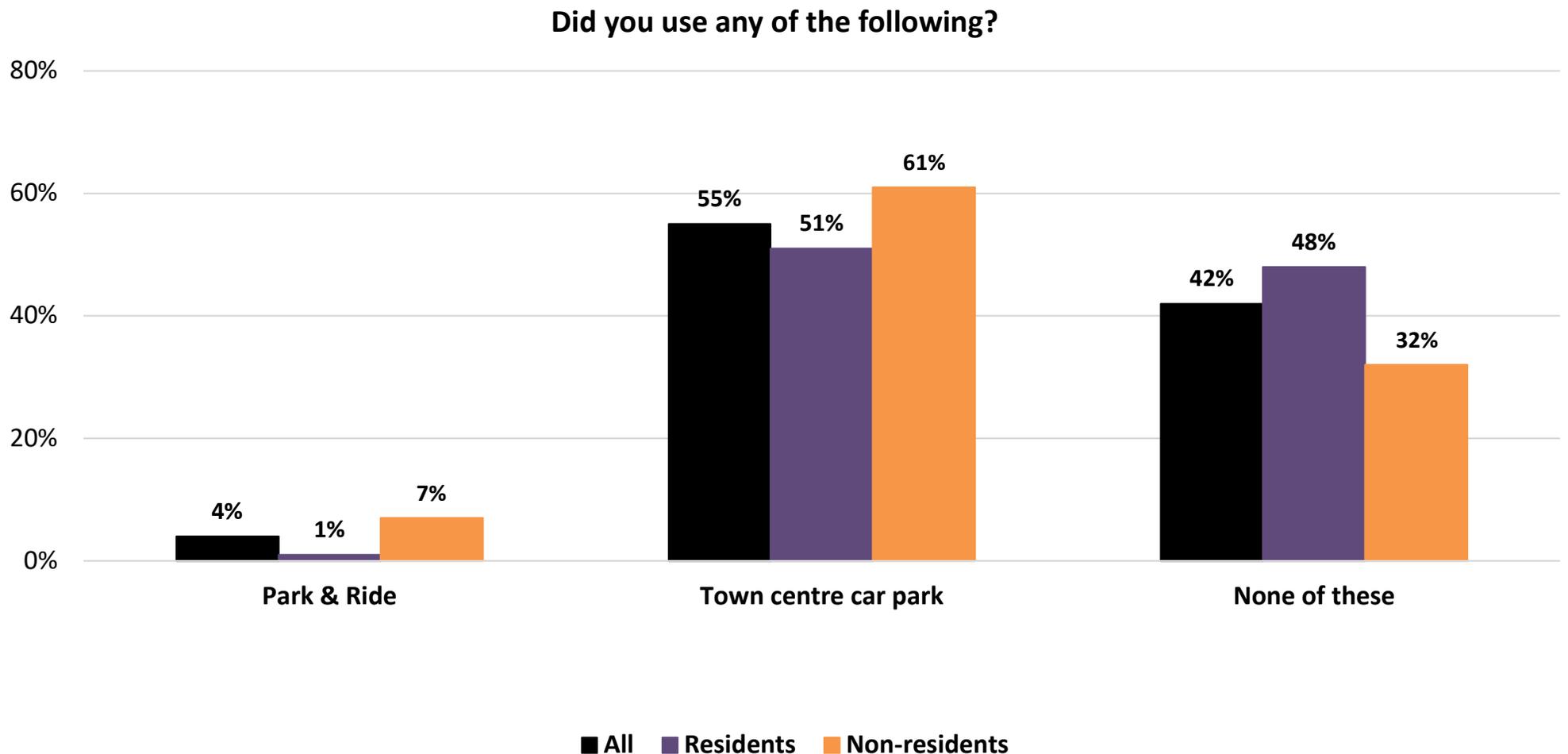
What form of transport did you use for the longest part of your journey to travel to Cheltenham?



55% had used a town centre car park.

55% of respondents who had arrived in the city by car/van etc. had used a town centre car park (51% and 61% of residents and non-residents respectively). 4% had used the park and ride (1% of residents and 7% of non-residents).

42% of respondents said they had not used either a town centre car park or the park and ride (48% and 32% of residents and non-residents respectively).



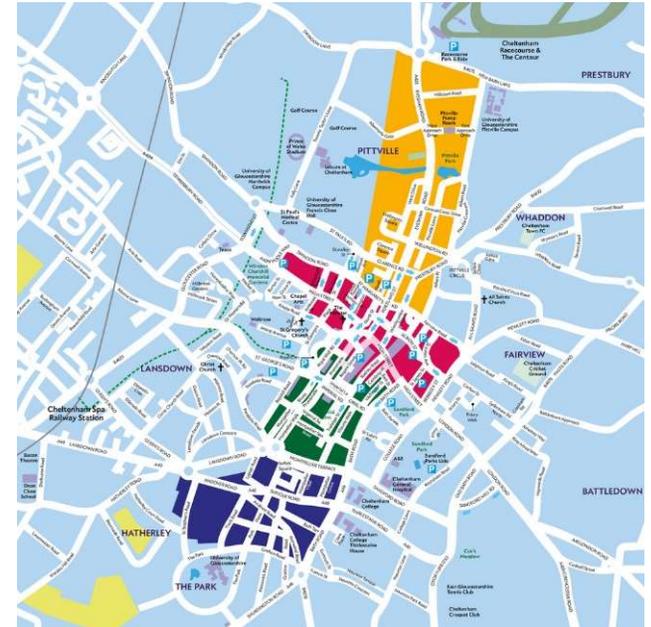
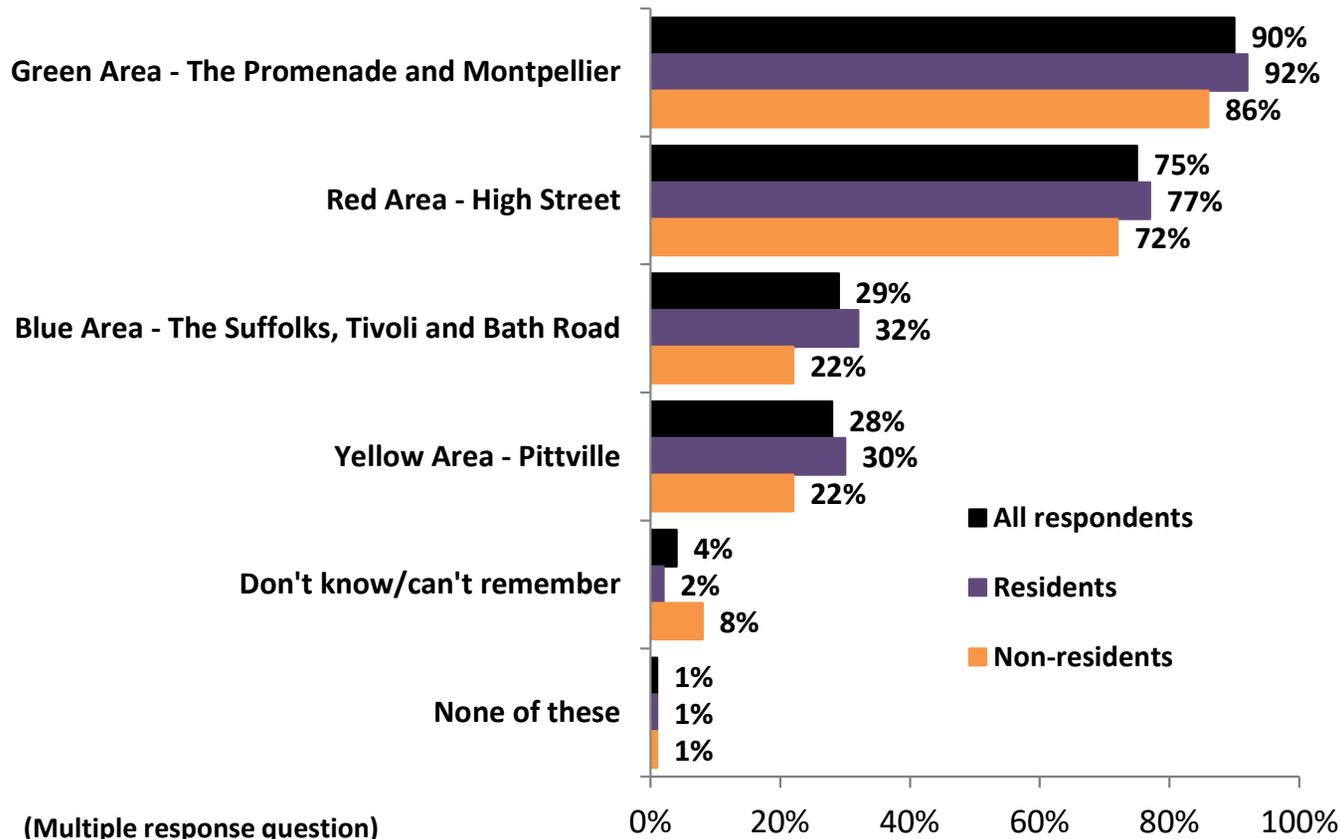
(Multiple response question)

90% of visitors had visited The Promenade and Montpellier area and 75% the High Street during their visit.

Visitors were asked to look at the map below and indicate which areas they had visited in Cheltenham. 90% had visited the green area (The Promenade and Montpellier), 75% the red area (High Street), 29% the blue area (The Suffolks, Tivoli and Bath Road) and 28% the yellow area (Pittville). 4% didn't know/could not remember which areas they had visited and 1% said they had not visited any of these areas.

A higher proportion of residents had visited each of the areas than non-residents.

Looking at the map below, which of the following areas did you visit in Cheltenham?



Cheltenham Christmas Survey 2021

Marketing

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20% of all visitors were prompted to visit Cheltenham as the result of a previous visit and 19% from Visit Cheltenham social media.

20% of visitors were prompted to visit Cheltenham from a previous visit and/or 19% from Visit Cheltenham social media e.g. Facebook/Twitter/Instagram etc. 11% had been recommended to visit the town and the same proportion were prompted to visit via the www.visitcheltenham.com website. 10% had seen other/general social media posts about visiting Cheltenham and 6% had seen some form of online advertising for the town.

2% had received an E-Newsletter from Visit Cheltenham and 1% in each case had been prompted to visit from another website(s), a magazine/brochure article, an article in the local paper or from a poster. 17% said they had been prompted to visit via another method with almost all of these respondents saying they were residents of the town. 5% said they could not recall what prompted their visit to the town.

The largest proportion of non-residents had been prompted to visit Cheltenham as the result of a previous visit (31% compared with 15% of residents), via Visit Cheltenham social media and or via a recommendation (16% in each case and compared with 20% and 9% of residents respectively) and 10% via the www.visitcheltenham.com website (11% of residents).

What prompted you to visit Cheltenham during the Christmas period 2021?	All	Residents	Non-residents
A previous visit	20%	15%	31%
None of these	20%	24%	12%
Visit Cheltenham social media e.g. Facebook/Twitter/Instagram etc.	19%	20%	16%
Other	17%	18%	15%
A recommendation	11%	9%	16%
Visit Cheltenham website www.visitcheltenham.com	11%	11%	10%
Other/general social media	10%	11%	9%
Online advertising	6%	5%	8%
I can't recall	5%	6%	5%
An E-Newsletter from Visit Cheltenham	2%	2%	2%
Another website(s)	1%	-	3%
A magazine/brochure articles	1%	-	1%
An article in the local paper	1%	1%	-
A poster	1%	1%	2%
Coach operator	-	-	1%

Overall recall was highest for the main Christmas campaign art work with influence on the decision to visit highest amongst those respondents who had seen the Christmas video.

All visitors were shown visual prompts of the main Christmas campaign art work for Cheltenham, the Christmas page on the www.visitcheltenham.com website and an image of the Cheltenham Christmas video (all three images are shown below) and asked if they recognised them and, if so, whether they influenced their decision to visit Cheltenham over the Christmas period.

Overall recall was highest for the main Christmas campaign art work for Cheltenham with 75% recognising it including 80% of residents and 65% of non-residents. This was followed by 67% who recognised the www.visitcheltenham.com/christmas page on the website (69% and 63% of residents and non-residents respectively) and 30% who recognised the Cheltenham Christmas video image (33% of residents and 23% of non-residents).

In terms of influence on the decision to visit, this was highest amongst those respondents who recalled the video (56% influenced to visit as a result of seeing the video including 54% of residents and 60% of non-residents) followed by the Christmas page on the www.visitcheltenham.com website (36% influenced to visit after seeing it including 35% and 38% of residents and non-residents respectively) and lastly the main campaign art work which influenced 33% of those who had seen it to visit Cheltenham including 30% of residents and 42% of non-residents.



75% visitor recall
(80% residents / 65% non residents)
33% Influenced decision to visit
(30% residents / 42% non residents)



67% visitor recall
(69% residents / 63% non residents)
36% Influenced decision to visit
(35% residents / 38% non residents)



30% visitor recall
(33% residents / 23% non residents)
56% Influenced decision to visit
(54% residents / 60% non residents)

Cheltenham Christmas Survey 2021

Visitor Expenditure

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All visitors attending the ice ring spent an average of £9.94 per person, with all visitors attending the Christmas Market spending an average of £9.25 per person.

All visitors spend elsewhere in Cheltenham was £34.74 per person.

For the purpose of establishing economic impact it was necessary to calculate expenditure for all visitor types individually, rather than the resident and non-resident breakdowns provided elsewhere in this report, with the estimates for each type shown in the table below. Please treat the staying visitors figures with caution due to the very small sample this was calculated from. However, as staying visitors accounted for just 3% of visitors overall their economic impact will be minimal.

Visitor expenditure by type	*Ice Rink	Christmas Market
All visitors	£9.94	£9.25
Resident/work in Cheltenham	£9.64	£6.89
Staying visitor	£14.87	£21.30
Day visitor	£10.10	£15.04

All visitors attending the ice ring spent an average of £9.94 per person, with all visitors attending the Christmas Market spending an average of £9.25 per person. Staying and day visitors spent more than residents in both areas.

*Ice rink spend for all visitors based upon actual figures provided differentials for visitor types estimated from survey data.

Visitor expenditure by type	Shopping	Food & Drink	Entertainment	Travel & Transport	TOTAL
All visitors	£17.10	£14.44	£1.79	£1.42	£34.74
Resident/work in Cheltenham	£16.61	£13.99	£1.33	£1.04	£32.97
Staying visitor	£34.14	£41.95	£7.66	£5.33	£89.08
Day visitor	£16.32	£12.74	£2.22	£1.89	£33.17

All visitors spend elsewhere in Cheltenham was £34.74 per person. Staying visitors had the highest average spend elsewhere in Cheltenham (£89.08) and in addition to this spent a further £42.65 per person per night on their accommodation.

Cheltenham Christmas Survey 2021

Visitors' Opinions

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Introduction

The survey obtained visitors' satisfaction levels with a wide range of factors or indicators which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of one to five where '1' = 'very poor' (or the most negative response), '2' = 'poor', '3' = 'neutral', '4' = 'good' and '5' = 'very good' (or the most positive response), allowing a satisfaction 'score' (out of a maximum of five) to be calculated.

Satisfaction was asked to those visitors who had visited the Ice Rink, those who had visited the Christmas Market and those who had visited Cheltenham during the Christmas period 2021 overall. The areas explored in terms of satisfaction were:

Ice Rink visitors	Christmas Market visitors	All visitors
Ease of booking	Location	Ease of getting to Cheltenham
Location	Ease of access	Availability of car parking
Ease of access	COVID safety measures	Value for money of car parking
COVID safety measures	Range of stalls	Range of places to eat & drink
Welcome and customer service provided by staff	Quality of goods/products on sale	Quality of places to eat & drink
Quality of the ice	Range of catering stalls	Range of shops
Quality of the skates and equipment	Quality of catering stalls	Quality of the shopping environment
Space to skate	Stall holders – customer service	Uniqueness of the shopping experience
Overall atmosphere	Site decoration, lighting etc.	Cleanliness of the streets
Overall enjoyment of visit	Overall atmosphere	Availability of public toilets
	Overall enjoyment of visit	Cleanliness of the public toilets
		General atmosphere
		Overall enjoyment of visit

The highest average scores were for the location of the Ice Rink (4.58), ease of booking (4.43) and ease of access (4.42).

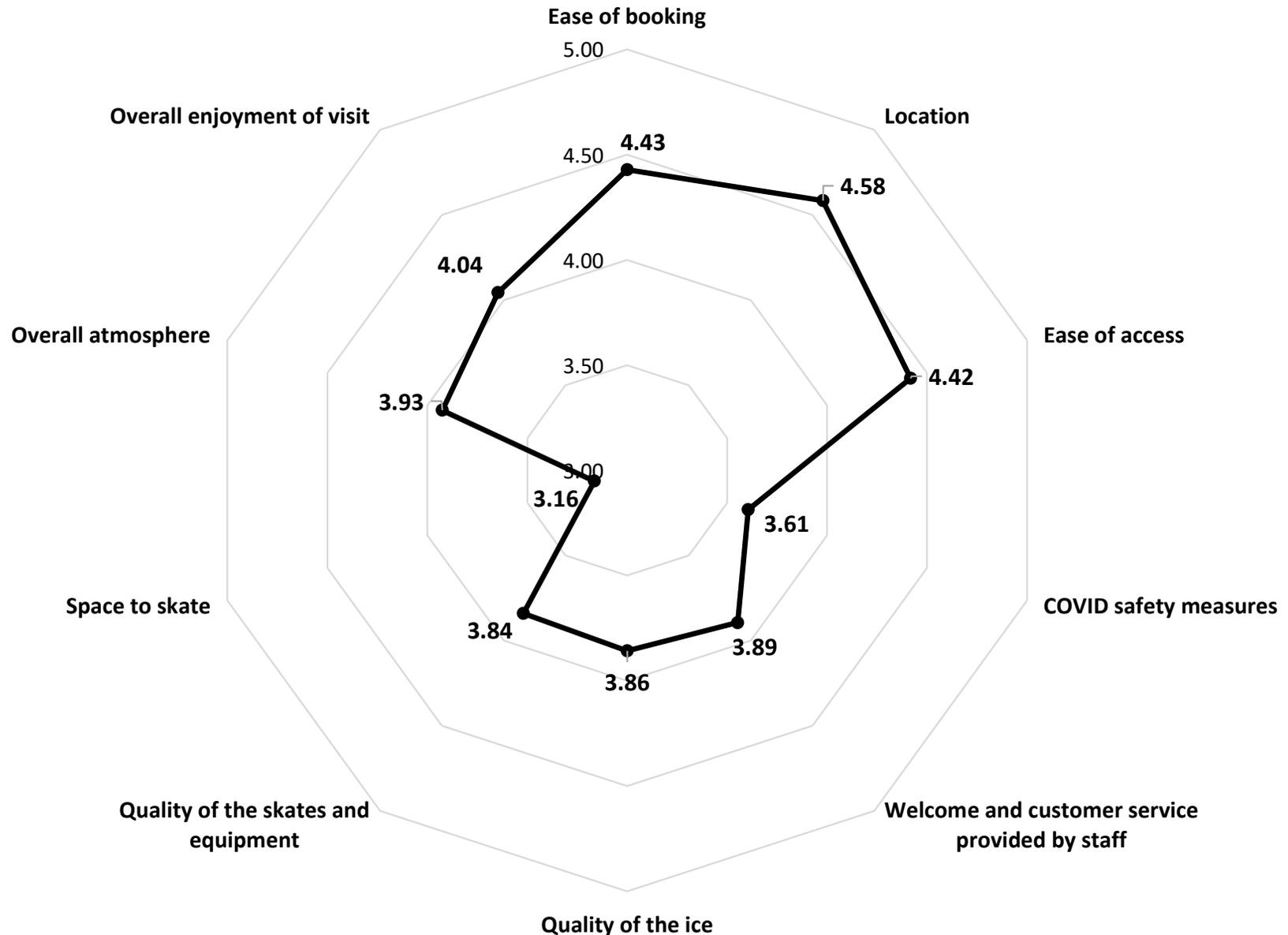
With the exception of having 'space to skate', on the whole visitor satisfaction levels with each of the aspects of their experience of going ice skating whilst in Cheltenham over the Christmas period were good to very good. 4 of the 10 indicators explored by the survey about the Ice Rink received an average score of 4.04 or more. The highest average scores were for the location of the Ice Rink (4.58), ease of booking (4.43), ease of access (4.42) and overall enjoyment of visit (4.04).

6 indicators received an average score of less than 4.00 with space to skate receiving the lowest satisfaction score at 3.16 followed by COVID safety measures (3.61), quality of skates and equipment (3.84), quality of the ice (3.86), welcome and customer service provided by staff (3.89) and overall atmosphere (3.93).

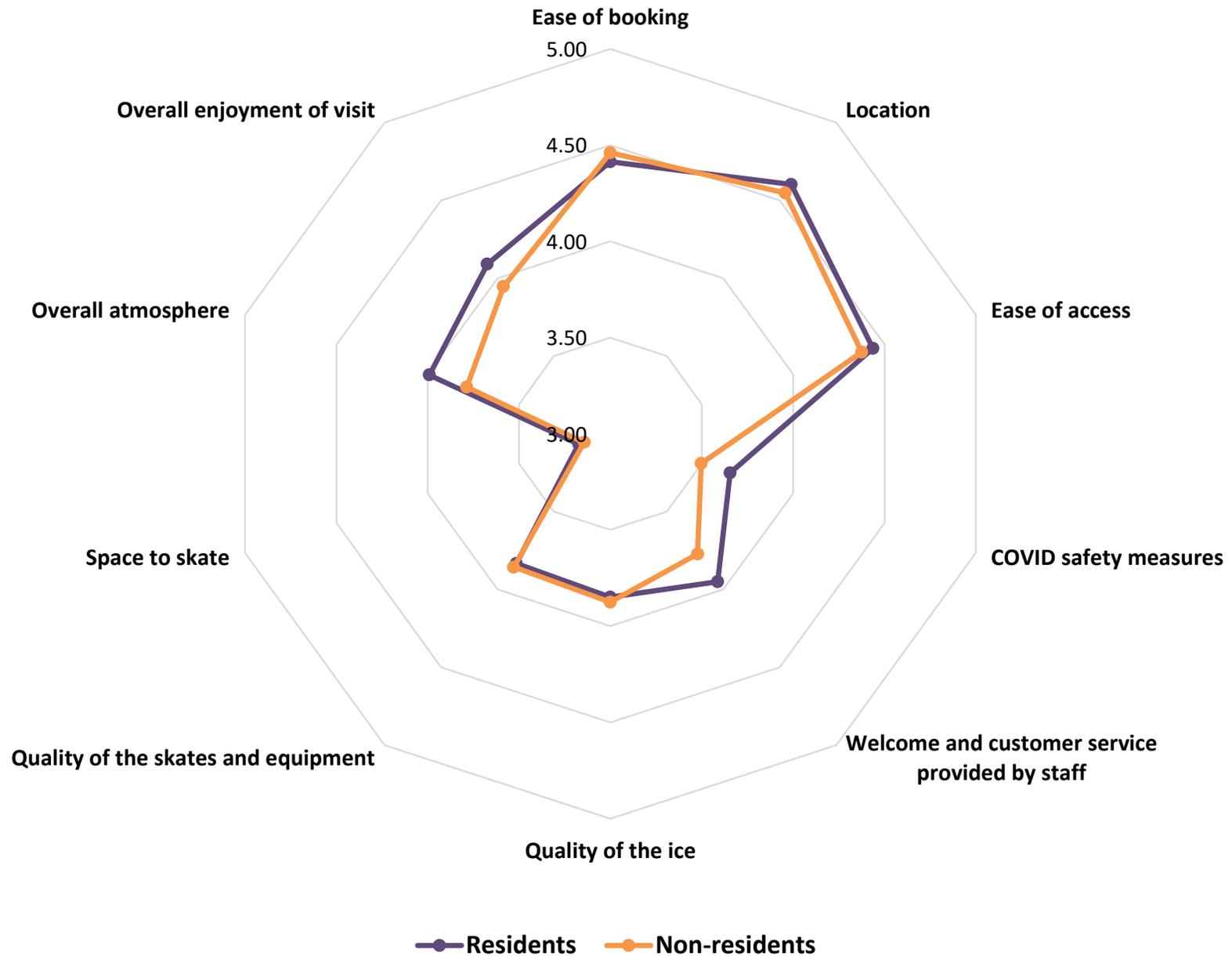
Residents typically rated their satisfaction levels with their experience at the Ice Rink slightly higher than non-residents.

Visitor satisfaction levels – Ice Rink visitors		All	Residents	Non-residents
1	Ease of booking	4.43	4.41	4.46
2	Location	4.58	4.60	4.55
3	Ease of access	4.42	4.44	4.38
4	COVID safety measures	3.61	3.66	3.50
5	Welcome and customer service provided by staff	3.89	3.95	3.77
6	Quality of the ice	3.86	3.85	3.87
7	Quality of the skates and equipment	3.84	3.83	3.86
8	Space to skate	3.16	3.17	3.14
9	Overall atmosphere	3.93	3.99	3.79
10	Overall enjoyment of visit	4.04	4.09	3.95

With the exception of 'space to skate' satisfaction levels amongst all visitors who went ice skating were good to very good.



Residents typically rated their satisfaction levels with ice skating higher than non-residents.



The highest average scores were for the ease of access to the Christmas Market (4.32) and the location of the Christmas Market (4.30).

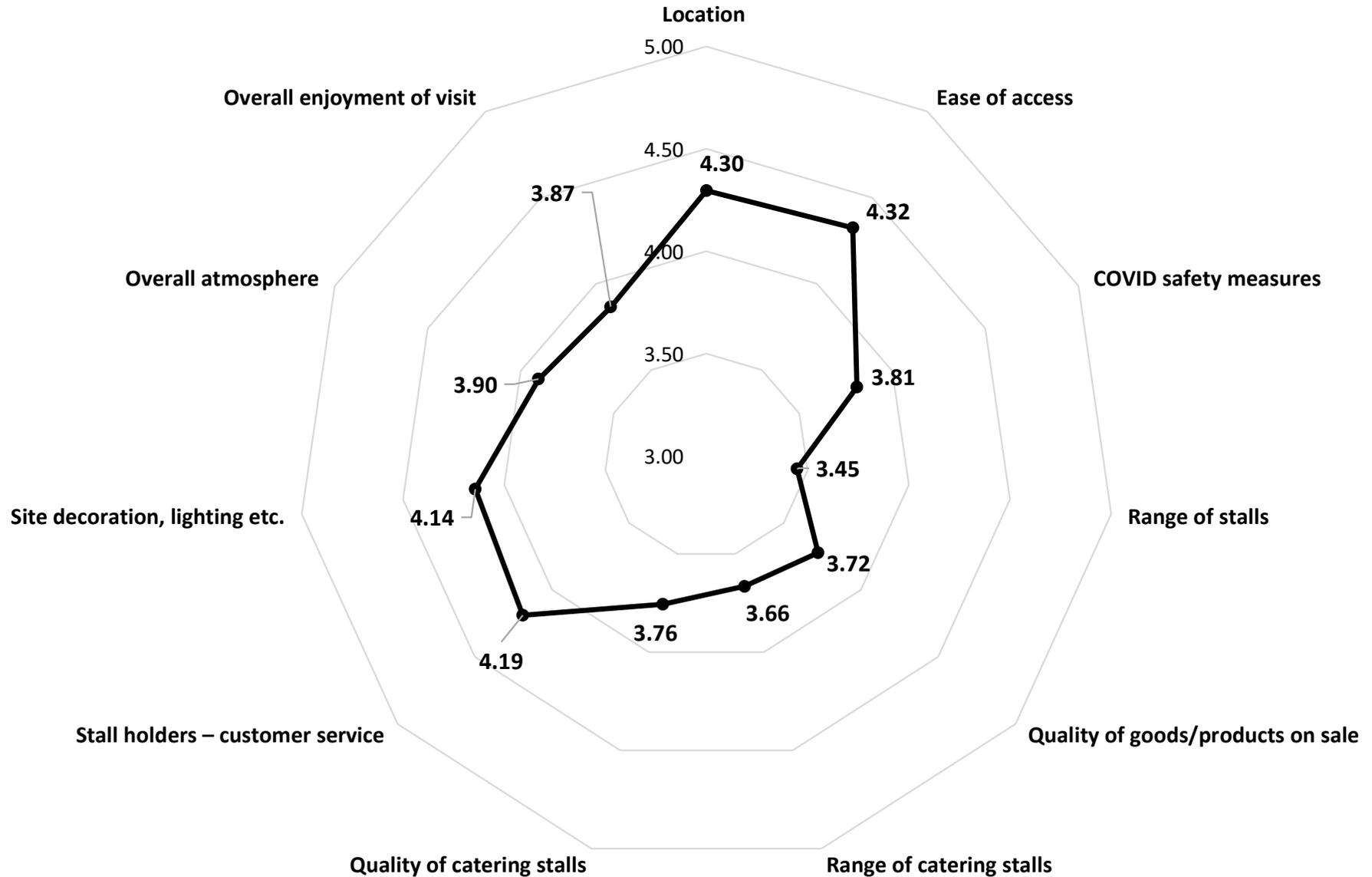
On the whole visitor satisfaction levels with each of the aspects of their experience of going to Cheltenham Christmas Market were good to very good. 4 of the 11 indicators explored by the survey about the Christmas Market received an average score of 4.14 or more. The highest average scores were for the ease of access (4.32), location of the Christmas Market (4.30), customer service provided by the stall holders (4.19) and site decoration, lighting etc. (4.14).

7 indicators received an average score of less than 4.00 with the range of stalls receiving the lowest satisfaction score at 3.45 followed by range of catering stalls (3.66), quality of goods and products on sale (3.72), quality of catering stalls (3.76), COVID safety measures (3.81), overall enjoyment of visit (3.87) and overall atmosphere (3.90).

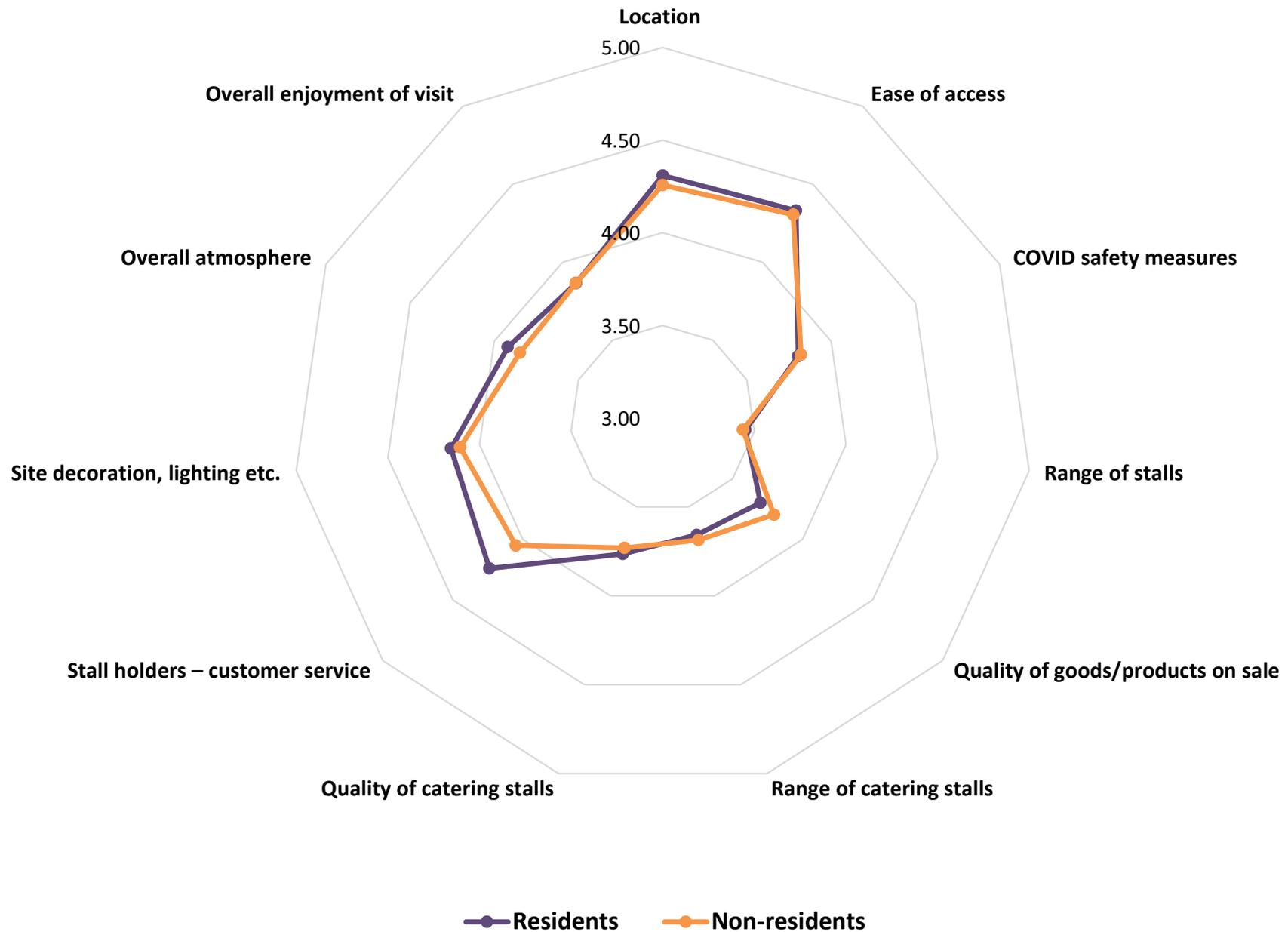
As was the case with those who went to the Ice Rink, residents typically rated their satisfaction levels with their experience at the Christmas Market slightly higher than non-residents.

Visitor satisfaction levels – Christmas Market visitors		All	Residents	Non-residents
1	Location	4.30	4.31	4.26
2	Ease of access	4.32	4.33	4.30
3	COVID safety measures	3.81	3.81	3.82
4	Range of stalls	3.45	3.45	3.44
5	Quality of goods/products on sale	3.72	3.70	3.80
6	Range of catering stalls	3.66	3.66	3.69
7	Quality of catering stalls	3.76	3.76	3.73
8	Stall holders – customer service	4.19	4.24	4.05
9	Site decoration, lighting etc.	4.14	4.16	4.10
10	Overall atmosphere	3.90	3.92	3.85
11	Overall enjoyment of visit	3.87	3.87	3.87

With the exception of the range of stalls satisfaction levels amongst all visitors who went to the Christmas Market were good to very good.



Once again, residents typically rated their satisfaction levels with the Christmas Market higher than non-residents.



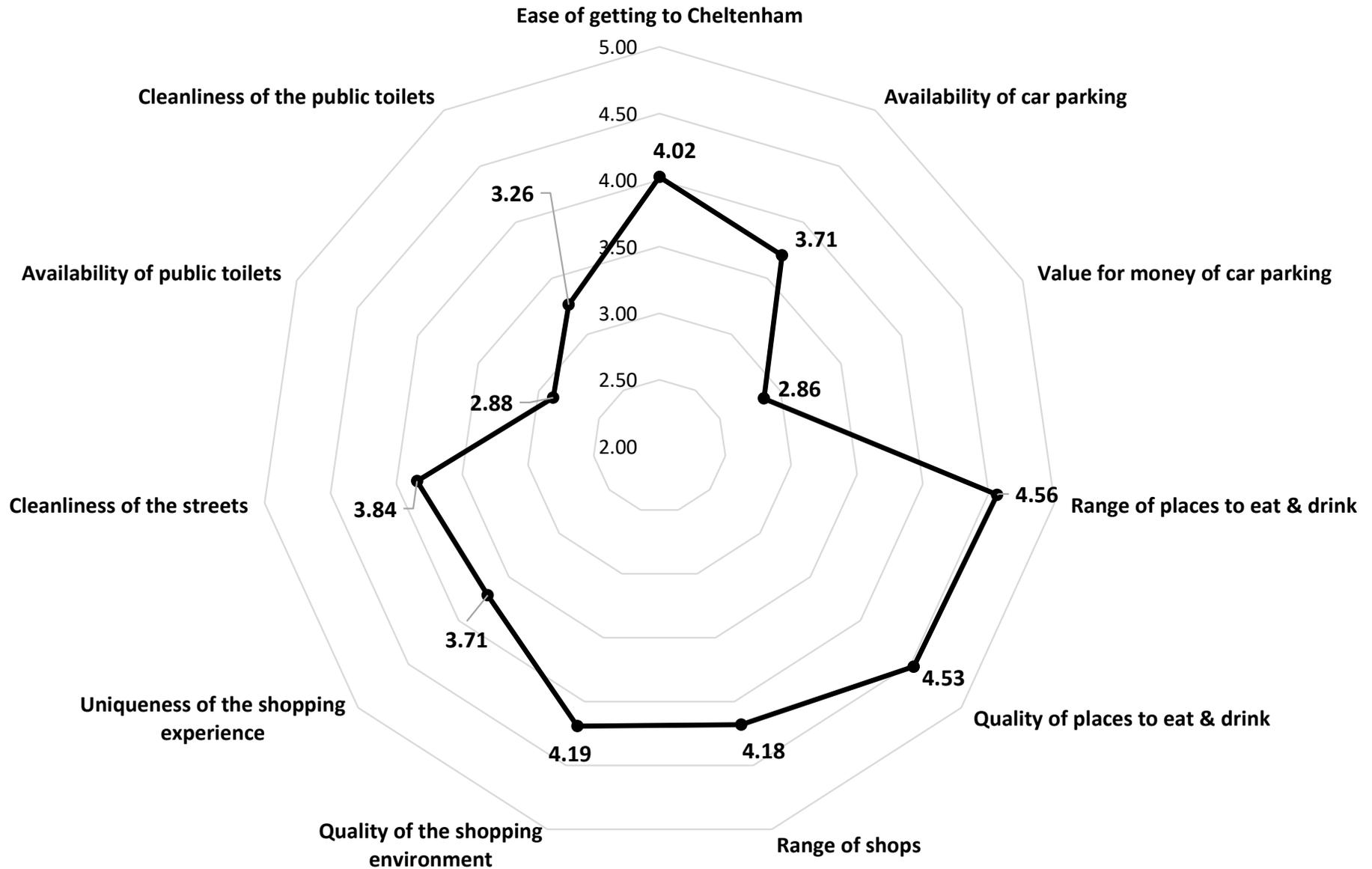
The highest average scores were for the range and quality of the places to eat and drink in Cheltenham (4.56 and 4.53 respectively).

With the exception of the value for money of car parking and the availability of public toilets, on the whole visitor satisfaction levels with each of the aspects of their experience of visiting Cheltenham over the Christmas period were good to very good. 7 of the 13 indicators explored by the survey about visiting the town overall received an average score of 4.02 or more. The highest average scores were for the range and quality of the places to eat and drink (4.56 and 4.53 respectively), overall enjoyment of visit (4.29), general atmosphere (4.27), quality of the shopping environment (4.19), range of shops (4.18) and ease of getting to Cheltenham (4.02).

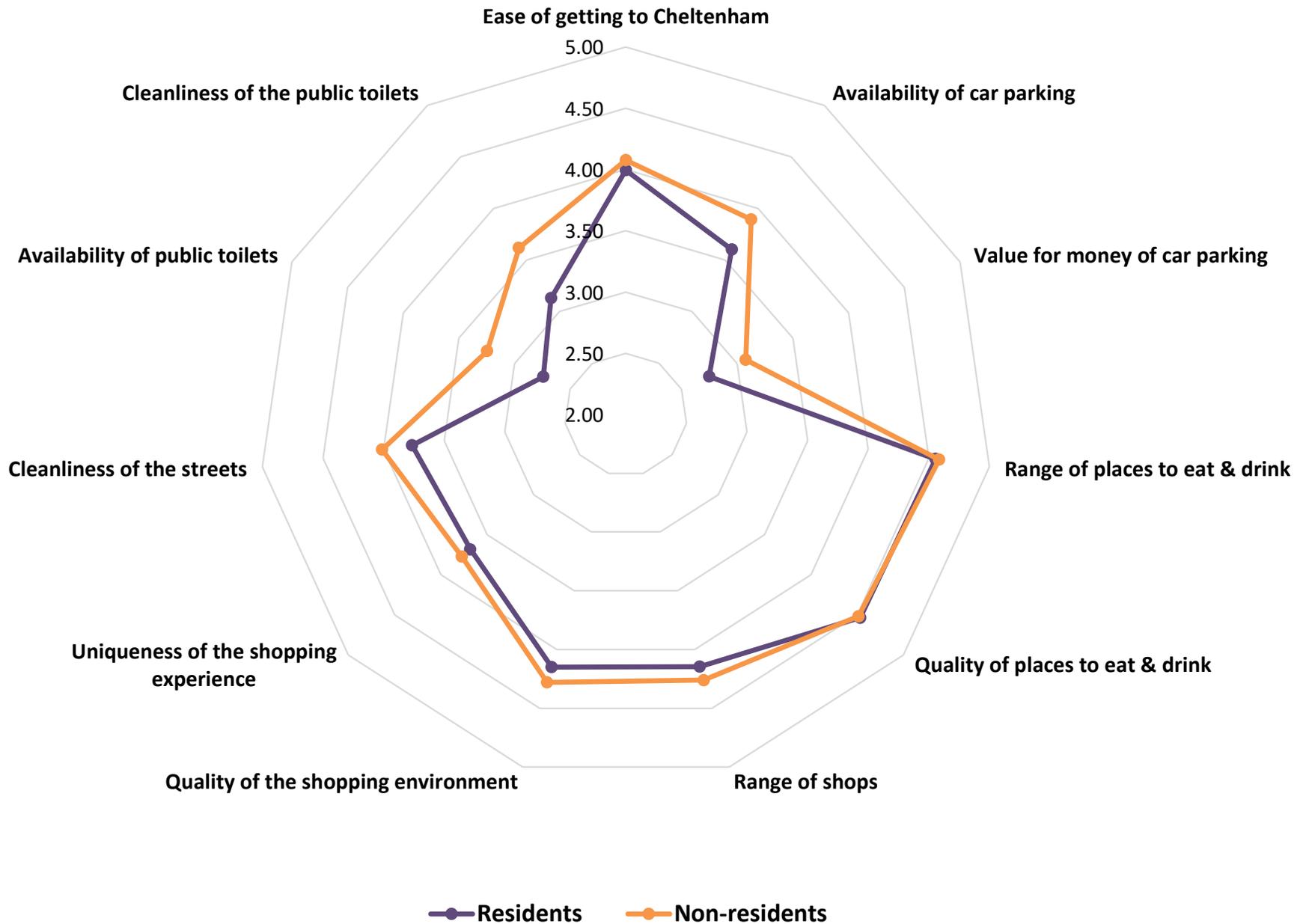
6 indicators received an average score of less than 4.00 with the value for money of car parking and the availability of public toilets receiving the lowest satisfaction scores at 2.86 and 2.88 respectively followed by the cleanliness of the public toilets (3.26), availability of car parking and uniqueness of the shopping environment (3.71 each) and the cleanliness of the streets (3.84). In contrast to satisfaction levels with the Ice Rink and Christmas Market, non-residents typically rated their satisfaction levels with their experience of visiting Cheltenham slightly higher than residents.

Visitor satisfaction levels – Overall visit to Cheltenham		All	Residents	Non-residents
1	Ease of getting to Cheltenham	4.02	3.99	4.08
2	Availability of car parking	3.71	3.60	3.89
3	Value for money of car parking	2.86	2.75	3.08
4	Range of places to eat & drink	4.56	4.56	4.59
5	Quality of places to eat & drink	4.53	4.53	4.52
6	Range of shops	4.18	4.15	4.26
7	Quality of the shopping environment	4.19	4.15	4.28
8	Uniqueness of the shopping experience	3.71	3.68	3.77
9	Cleanliness of the streets	3.84	3.76	4.01
10	Availability of public toilets	2.88	2.74	3.25
11	Cleanliness of the public toilets	3.26	3.13	3.62
12	General atmosphere	4.27	4.26	4.27
13	Overall enjoyment of visit	4.29	4.30	4.26

With the exception of the value for money of car parking and availability of public toilets scores were good to very good.



Non-residents typically rated their satisfaction levels with visiting Cheltenham higher than residents.



Likelihood of recommending the Cheltenham

Recommendation scores are a simple but effective new method for measuring customer loyalty invented by Bain consultant Fred Reicheld who discovered that a single question provides the ultimate measure of just how loyal customers are and that this method could then be used to accurately predict future revenue growth.

Recommendation scores are calculated by asking a sample of customers a single question “How likely is it that you would recommend xyz to a friend or colleague?”. The respondent is asked to respond on an 11 point scale from ‘0’ (not at all likely) to ‘10’ (extremely likely) depending on how positive they feel about the product/event/location. The proportion of those who think it unlikely they would recommend it (Detractors) subtracted from the proportion that are likely to recommend it (Promoters) produces a single number known as a Recommendation Score.

Based on their response to this question respondents are then divided into three distinct groups:

0-6 score are Detractors *These are customers that have generated sales but are actually bad for the company over the long haul. They are less likely to buy anything/visit the event/location again and more likely to spread bad word of mouth and more costly to serve because of their dissatisfaction.*

7-8 are Passives *These customers are generally more positive about the product/event/location but are significantly less valuable than Promoters. Many companies over estimate their success by assuming relatively high customer satisfaction will lead to future growth. In reality Passives may be satisfied but that may not be enough in the longer term.*

9-10 are Promoters *These customers drive business growth. The product/event/location has gone beyond satisfying their needs and truly delights them. As a result they will buy more from this company or visit an event or location again in the future, will recommend it to many others and therefore the company/product/event/location will not need to undertake costly ad campaigns or sales promotions to retain their business.*

The Recommendation Score is created by calculating what percentage of the customer base are Promoters and then subtracting the percentage who are Detractors.

$$\% \text{ Promoters} - \% \text{ Detractors} = \text{RECOMMENDATION SCORE}$$

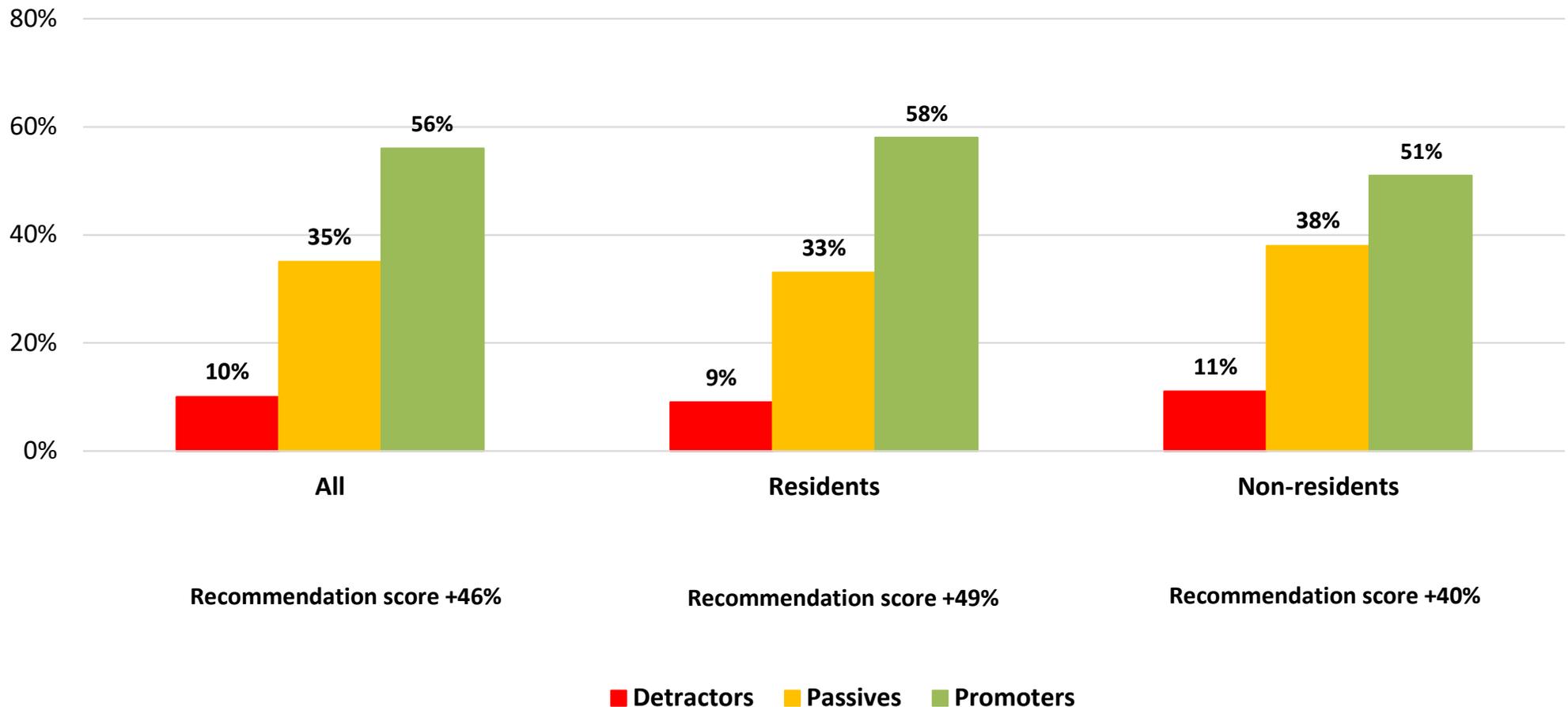
The higher or more positive the score the more satisfied the customer base.

Cheltenham received a good recommendation score of +46%.

Cheltenham achieved a recommendation score of +46% amongst all visitors. 56% of all visitors were categorised as 'Promoters' giving a score of 9 or 10 out of 10 for their likelihood of recommending Cheltenham to their friends or family, 35% gave a score of 7 or 8 and were categorised as 'Passives' whilst 10% gave a score of 0-6 for their likelihood of recommending the town and were therefore categorised as 'Detractors'.

Residents gave Cheltenham a higher recommendation score (+49%) than non-residents (+40%).

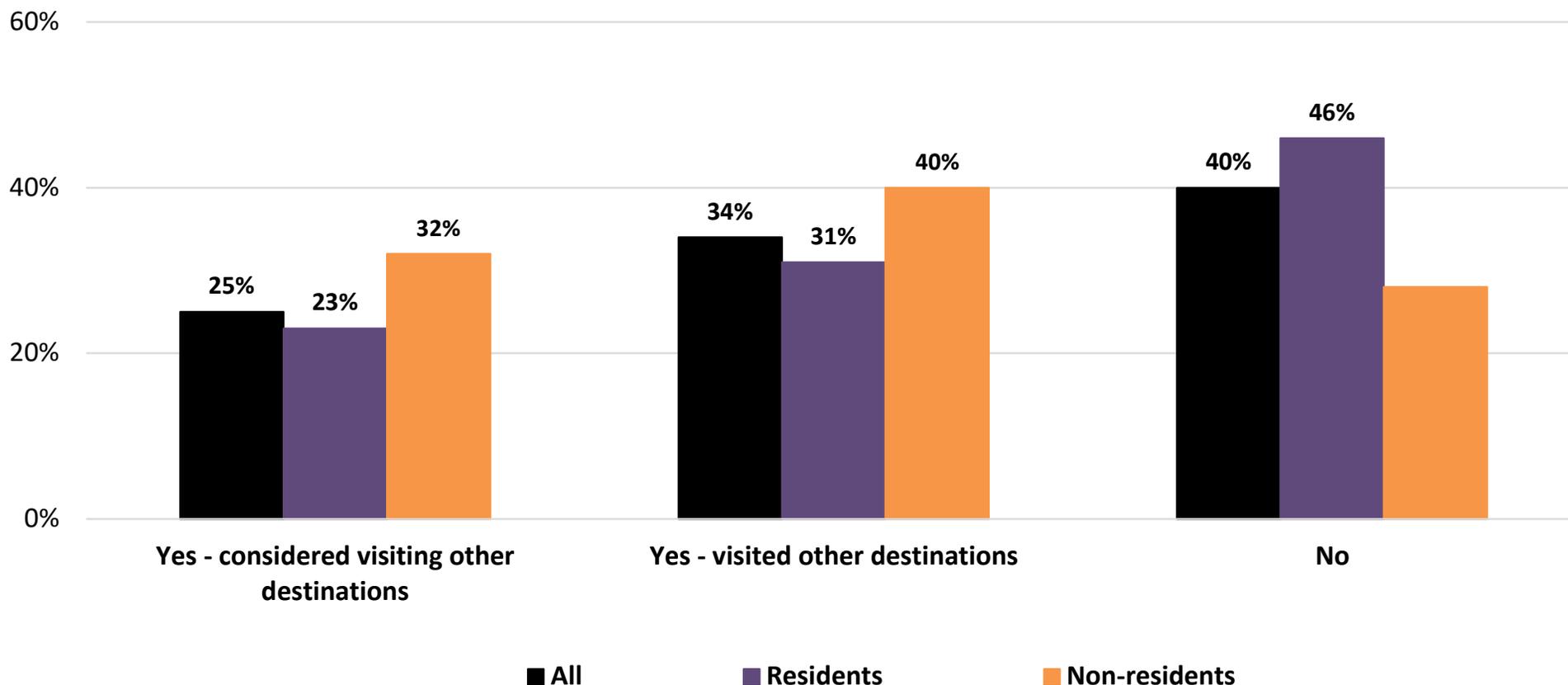
How likely would you be to recommend a visit to Cheltenham to your friends/family?



59% of all visitors had considered visiting (25%) or had visited (34%) other destinations over the same period.

59% of all visitors to Cheltenham over the Christmas period 2021 said they had considered visiting (25%) or had visited (34%) other destinations over the same period including 54% of residents (23% considered and 31% had visited other destination(s)) and 72% of non-residents (32% considered and 40% had visited other destination(s)).

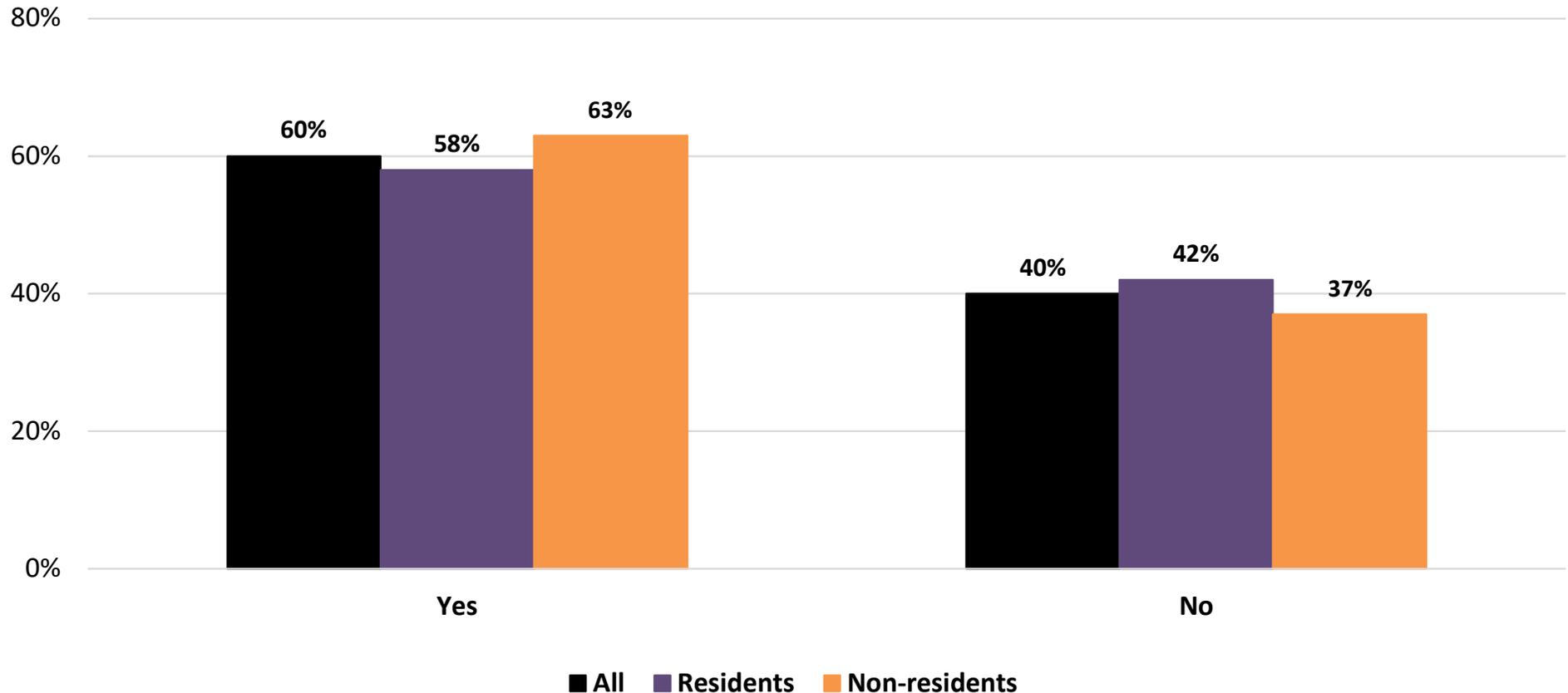
Did you visit/consider visiting any other destinations for Christmas shopping/festive activities in the run up to Christmas 2021 between the 18th November 2021 and 2nd January 2022?



60% of respondents who had considered visiting other destination(s) said they chose to visit Cheltenham in direct preference.

Those respondents who had considered visiting other destination(s) only were asked if they chose to visit Cheltenham in direct preference to this/these other destination(s). 60% said they had including 58% of residents and 63% of non-residents. The other destinations visited/considered for a visit are shown overleaf.

**Did you choose to visit Cheltenham in direct preference to this/these other destination(s)?
(Those who considered visiting other destination(s) only)**



Cheltenham Christmas Survey 2021

Non-Visitors

**VISIT
CHELTENHAM**
THE FESTIVAL
TOWN



Distance from home/accommodation and was the main deterrent stopping non-visitors from visiting Cheltenham over the Christmas period 2021 along with saying they will visit again in the future having been before.

3% of all respondents who took part in the online survey said they had not visited Cheltenham over the Christmas period 2021 (21 respondents). These respondents were routed to a separate section of questions within the online survey which asked them why this was the case, any other destinations they had visited instead, whether they chose to visit those destinations in direct preference to Cheltenham and, if so, why that was the case. Due to the low sample size the results to follow in this section should be interpreted with caution.

When asked why they had not visited Cheltenham over the Christmas period 2021, 29% in each case said it was too far from their home/accommodation and/or that they will visit again in the future having been to the town before (6 respondents in each case). 24% said it was because of the Covid-19 pandemic (5 respondents).

10% in each case said they went to other destination(s) instead, they had a lack of money/available finances, they were not interested and/or they lacked their own transport to travel to Cheltenham (2 respondents in each case).

The other destination(s) visited instead were Gloucester, Hereford, Worcester (1 respondent) and the Malvern Winter Glow (1 respondent). Both the respondents who said they had visited these other destinations said they had chosen them in direct preference to Cheltenham with one saying this was because 'Cheltenham is dead' and the other that the Malvern Winter Glow is 'A bigger area so due to Covid thought they could spread out easier'.

Why didn't you visit Cheltenham over the Christmas period 2021?	Count	%
Distance from home/accommodation	6	29%
I will visit again in the future having been before	6	29%
Covid 19 pandemic	5	24%
None of these	4	19%
Other	3	14%
Went to another destination(s) instead	2	10%
Lack of money/available finances	2	10%
Not interested	2	10%
Lack of own transport	2	10%
Children too young	1	5%
Children not interested	1	5%
Not a child friendly environment	1	5%
Lack of public transport	1	5%
Too crowded	1	5%
I have been before and once is enough	1	5%
Wrong weather to visit	1	5%

* Please interpret the results in this chapter with caution due to the low sample size for non-visitors of only 21.

Cheltenham Christmas Survey 2021

The South West Research Company Ltd

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