Incremental Visitor Expenditure Directly Generated by Visitor Information Centres

A National Study on Behalf of VisitEngland

Final Report

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TOURISM
SOUTH EAST

CONTENT

EXECUTIVE SUMMARY

Tourist Information Centres in England generated an additional £170.2 million for the visitor economy.

- **Approximately 25 million people visited a Tourist Information Centre in England in 2008, of these it is estimated 14.4 million were tourists.**

- **As a direct result of visiting the TIC, 46% of tourists (6.6 million) made positive changes to their trip which included visiting more attractions and places of interest and increasing the length of their trip.**

- **Approximately 3.1 million tourists went on to spend more money as a result of making changes to their trip. Total incremental expenditure is estimated to be £170.2 million.**

STUDY BACKGROUND

This report presents the findings of a study into the role played by Tourist Information Centres (TICs) in influencing visitor behaviour, especially in relation to length of stay and expenditure.

A central focus of this study is to determine the incremental visitor expenditure directly generated by TICs. In order to measure this, a sample of walk-in visitors and email/telephone enquirers were contacted to ascertain to what extent, if any, the information received from the TIC impacted on their travel behaviour. In particular, whether the information received lead to an extension of time spent in the area visited, widened the range of activities undertaken, including visiting more or different attractions, and most importantly whether the information received lead to additional expenditure in the area.

WHO VISITS TICs?

Visitor type

- English TICs are visited in the main by visitors from outside the area and local residents. There are significant differences in the distribution of visitors and local residents at regional and DPUK category level.

- London TICs are primarily visited by tourists, the majority of which are holiday-makers. The volume of use by local residents is relatively low at 14%. A relatively similar picture is also found among South West TIC visitors, though a relatively higher proportion are local residents (28%). In Yorkshire similar proportions of local residents and holiday-makers visit TICs (34% and 35% respectively).

- The majority of City 3 and City 4 TIC visitors are local residents, with the proportion of local residents found to be the greatest among City 4 TICs (81%). Rural South TICs also show a strong presence of local users (52%).

- The DPUK category TICs where over half of visitors are tourists are City 2 (58%), Coastal (54%) and Rural North (54%). Holiday-makers are consistently the dominant tourist group among these TICs visitors.

Visitor age & size of group

- The study found that 72% of TIC visitors are over the age of 35 years. The age band with the largest proportion of visitors is 55-64 years of age (19%).

- The age pattern among TIC visitors is relatively consistent across the regions and among DPUK categories.

Visitor origins

- The vast majority of TIC visitors are UK nationals. The study found that 88% of visitors as UK residents and 12% are overseas nationals.

- Across the regions the proportion of TIC visitors from overseas is lower in the East, the Midlands, and the North, with the exception of Yorkshire where the proportion of overseas visitors to closer to the England-wide picture.

- The proportion of overseas visitors is also lower among rural TICs and City 3 and 4 TICs. On the other hand, overseas visitors represent just over half of London TIC visitors.

Visitor segmentation

- Cosmopolitans and Functionals are the two dominant Ark Leisure segments found among TIC visitors.

- Cosmopolitans are an attractive group for TICs. They tend to come from high income households and are big spenders. They are by nature an active group so when visiting places they like to look for lots of information about what to see and do in an area.

- Functionals on the other hand are very price focused. When visiting TICs they are typically searching for information which will enable them to get the best value for money out of their trip to the area.

Visit patterns

- Many visitors are repeat visitors; 81% of all visitors had visited the same TIC previously.

- A significantly higher proportion of first time visitors were found among London TIC visitors. Around a third of London TIC visitors were visiting for the first time.

- A relatively higher proportion of North West, Yorkshire, City 1 and City 2 TIC visitors were also visiting for the first time compared to the other regions and DPUK category TICs.

- Repeat visitors were asked to indicate the number of previous visits made to the TIC. The survey found that around half of England's TIC visitors made more than four visits to the TIC in the past 12 months. This pattern was found to be relatively consistent throughout the regions and DPUK categories and is likely to be a reflection of the relatively high level of usage by local residents.

WHY DO PEOPLE VISIT TICs?

Reason(s) for visiting TIC

- The main reason people visit a TIC is to obtain visitor information. Obtaining information on local attractions was the top main reason stated by TIC visitors across all regions. Just over half (57%) of visitors to London TIC stated this to be the main reason for their visit.

- Getting hold of information on local travel and transport services and events are also important reasons for calling in at the TIC. The study found that getting hold of information on accommodation, places to eat, activities to participate in and leisure facilities in the area, are of less importance among walk-in visitors.

- The use of TICs as a place to book accommodation or purchase attraction /theatre/event tickets was also relatively low among walk-in visitors.

- Maps and guidebooks on the other hand are popular purchase items among visitors, particularly among London TIC visitors.

- Results split by DPUK category reveal that obtaining information on visitor attractions is the most frequently mentioned 'main reason' given by City 1, City 2, City 3, Coastal, Rural North and Rural South TIC visitors, though the proportion stating this reason was smaller for Rural South TICs.

- The exception to the norm is City 4 where 16% of visitor gave 'to obtain information on visitor attractions' as their main reason, considerably lower to the other DPUK category TICs.

- As the vast majority of City 4 TIC visitors are local residents, it is not surprising that the most popular reasons for visiting the TIC are to obtain information on local travel and transport services and to make use of other local services provided by the TIC such as community council services (council tax and housing benefit collection/inquires) and café and tea rooms (where provided).

HOW MUCH DO PEOPLE SPEND AT TICs?

Visitor expenditure at TIC

- The study found that only a very small proportion of visitors spend money at the TIC itself. The overall results for 'All England' shows that only 2% of all visitors spent money during their visit on booking accommodation, 3% purchased coach/train tickets, 3% purchased theatre/event tickets, 2% purchased entrance tickets to fee paying attractions, 11% of visitors spent money on buying gifts/souvenirs, 6% spent money buying maps or guidebooks and 3% purchased 'other 'items.

- Unsurprisingly expenditure was highest for accommodation bookings[1]. Among visitors booking accommodation at the TIC during their visit, the average expenditure on accommodation is £56.56 per visitor. However, once this expenditure is averaged out across all visitors, including those who did not book accommodation, to calculate average spend per head/visitor, the average is reduced to only £1.28 per visitor.

- Overall the average spend per visitor at the TIC is £4.08. The study found differences in the average spend figure across the regions and DPUK categories.

- The lowest average spend per visitor is found among South West TIC visitors, an average of £0.96 per visitor; and Rural North TIC visitors, an average of £1.52 per visitor.

- The highest average spend per visitor is found among North West TIC visitors, and average of £9.27 per visitor; and City 2 TIC visitors, an average of £11.50 per visitor.

HOW DO VISITORS RATE THE QUALITY OF THE SERVICE?

Visitor satisfaction

- The study found a high level of satisfaction among TIC visitors with nearly all aspects of the visit receiving a mean score of over 4 points out of 5.
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- Among the regional results, the only aspects receiving lower scores are 'Local products on display or for sale' at London TICs (mean score of 3.9) and interactive displays at South East and South West TICs (mean score of 3.9).

[1] This includes total fee paid by visitors on accommodation, not the total income received by TICs.

WHAT IMPACT DO TICs HAVE ON TRAVEL BEHAVIOUR?

Influence on original travel plans

- The study found that around 46% of visitors change their original trip plans as a direct result of the information received at the TIC.

- The study found that information provided by London and South West TICs, and City 1 TICs had an impact on a far larger proportion of visitors than that provided by TICs located in other regions and in other DPUK categories. Sixty-two percent of London TIC visitors, 54% of South West TIC visitors and 51% of City 1 TIC visitors will change their original travel plans as a direct result of visiting a TIC during their trip.

Aspects of trip affected

- The study reveals that three areas of the trip are the most affected. Over half of those TIC visitors (53%) influenced by the information received at the TIC will go on to visit others areas around the destination and visit more attractions which they had not previously planned to do so and just under half (48%) will go on to spend more money on their trip than originally planned/anticipated.

- Results split by region and DPUK category reveal a relatively consistent pattern of behaviours impacted on with' 'Visited other areas around destination', 'Visited more attractions, events etc', and 'Spent more money' as the most common trip aspects affected.

Extra nights & spend

- Around a quarter of visitors influenced by the information received at the TIC will go on to extend the length of time of their trip. Day visitors will extend their trip by an average of 2.35 hours, whilst overnight visitors will extend their trip by an average of 1.01 nights.

- Changes in activity patterns and extension of trip duration have a positive impact on visitor expenditure. Day visitors will spend on average an additional £15.53 per person and an overnight visitor will spend on average an additional £57.24 per person per night.

- Expenditure is highest among London TIC visitors who spend on average an additional £162.16 per trip for overnight trips per person and £31.60 for day trips per person.

- Shopping items and food and beverages are the main additional purchases among overnight and day visitors.

1. INTRODUCTION

1.1 Study aims and objectives

A key goal of tourism marketing is to use information to modify visitor behaviour to increase the number of days spent in the area as well as the level of visitor expenditure. In January 2007, VisitBritain launched its Action Plan for Tourist Information Services in England. A key part of the programme is to improve the level of data about tourist information services and the impact that they create within the visitor economy.

In view of this VisitBritain[2] commissioned TSE Research to evaluate the effectiveness of information provided by English TICs in modifying travel behaviours. The travel behaviours which were considered in the study included the extension of time spent in the area visited, visiting more/alternative attractions/places, and increased expenditure produced by longer visits or visiting different/more attractions/places.

Specifically, the study objectives were:

- To measure the influence TICs have on the decision-making process of visitors, in particular the influence TICs have on the length of stay and expenditure;
- To produce an incremental spend figure for TICs in England based upon Regional and DPUK categories[3];
- To ensure that the economic impact of all TIC customer touchpoints is fully represented including walk-ins, telephone enquiries and e-mail;

Whilst the central focus of the study is to determine the additional visitor expenditure generated by TICs at regional and DPUK level, it is important to remember a crucial point which was aptly put in *TEAMs* strategic review of visitor information services in the South East. Team consultants noted that

> *"TICs vary widely in their operations according to their location and position within the region and the rationale for their existence. There is therefore no single common approach that will work for all TICs, and it is a mistake to attempt to justify the existence of certain TICs against the single criterion of measurable economic benefit from visitors"[4].*

It is not the purpose of this study to present the incremental economic impact figures for each region and DPUK category as indicators of relative performance. Rather, the purpose is to provide a baseline for the regions and DPUK groups from which further appraisals of TIC services can be made.

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[2] *Since the commissioning of this study, VisitBritain has split into two organisations: VisitBritain and VisitEngland. This study is now under the remit of VisitEngland.*
[3] *Destination Performance UK is the membership organisation for local authority tourism services committed to the principles of performance management and best practice. It currently has around 135 member authorities, split in to nine category groups. A description of the classification can be found in Appendix 4.*
[4] *Tourism South East (TSE) commissioned Tourism Enterprise and Management Ltd (TEAM) to undertake a review of the role of the Tourist Information Centre (TIC) service in the provision of visitor information within its region.*

1.2 Study methodology

To estimate incremental spend a sample of walk-in visitors and enquirers who contacted TICs via email and telephone were recontacted through a follow-up survey.

The study was divided into two stages. The first stage involved a face-to-face interview survey with a sample of walk-in visitors and the gathering of visitor contact details from the main customer ‘touchpoints’ – walk-ins, email and telephone from a sample of TICs. The purpose of obtaining the contact details was to invite visitors/enquirers to take part in an online survey (stage 2) about the information received from the TIC and the impact (if any) this had on their trip to the area.

The methodology is described in more detail in Section 2 of the report.

1.3 Economic impact method

The first process for calculating economic impact is relatively simple. Visitor expenditure is simply multiplied by the number of visitors. For this study, we have an additional issue over determining who counts as a ‘visitor’. Our incremental visitor expenditure figures relate to walk-in visitors only. Because it is impossible to know every visitor’s motivation for entering a TIC building it is not possible for us to discount visitors who have not specifically come to visit the TIC.

We do, however, exclude local residents from our overall calculations. In conventional tourism economic impact analysis, the spending of local residents is not considered to represent injections of new money into the area, but merely the “recycling” of money already in the area. The argument is best illustrated with the example of residents purchasing goods at a local event or festival. It is probable that if residents had not made purchases at the event, then they would have disposed of the money either now or later by purchasing other goods and services in the community. For instance, £40 spent by a local family at an art festival could have just as easily been used on movie tickets or other entertainment elsewhere in the host area. Thus, expenditures by residents offer no net economic stimulus to the community.

However, we believe that there is an exception to this rule which could be applied to a study of TIC impact. Tourism economic impact analysis would sensibly include spending by residents if there is some evidence to suggest that TICs have a direct influence on keeping some community members from making trips elsewhere and spending their money there. One would need to establish the level of expenditure by asking local residents to report on spending in the local area which is additional to their normal weekly/monthly economic activity and which is directly related to their visit to the TIC.

Unfortunately this local resident spending assessment is outside the scope of this study. A separate study is needed to learn more about how local resident expenditure directly generated by a visit to a local TIC impacts on the local and regional economy. However, there is scope to include questions on local expenditure in the TIC self-assessment toolkit we propose. The toolkit is discussed in concluding section of the report.

1.4 Outline of report

Following an outline of the objectives of the research, the methodology is discussed in more detail in Section 2 of the report. Section 3 presents the results from the first phase of the study. This involved face-to-face interviews with over 5,000 TIC walk-in visitors. In addition to obtaining profile data, visitors were asked a range of questions relating to their use of the TIC and their satisfaction with the ‘visit experience’.

Section 4 presents results from the follow-up survey. The main focus of the second phase of the survey was to assess whether the information received from the TIC led to increased stay and increased expenditure in the area. The results are used to calculate the incremental economic impact of TICs are regional and DPUK level.

It should be noted that the TICs representing the London DPUK category group are for obvious reasons also the same TICs representing London as a region. The results from the survey are thus the same for the two groups.

The concluding section outlines areas for further research.

1.5 Study caveats

There are a number of caveats which the reader must be made aware of.

- In order to produce incremental spend figures for each region and DPUK category as well as for each customer touchpoint it was necessary to have a large enough sample of walk-in, email and telephone recontacts. This initial sample pool would provide respondents for the follow-up survey. We anticipated that approximately 35% to 40% of recontacts would complete the follow-up survey.

  The original target we aimed for was 18,228 recontacts to be collected direct by TIC staff and send to us in a spreadsheet. On our calculations this would provide us with a potential of 6,000 to 7,000 completed follow-up questionnaires, a respectable number from which sub-group analysis could be made (e.g. incremental spend by each customer touchpoint).

  In reality, TICs were unable for various reasons to provide us with this volume of recontacts. Only 6,461 recontacts were returned from TICs. A further 1,528 recontacts were obtained from the face-to-face interview survey with walk-in visitors. In all, the majority of recontacts came from walk-in visitors; the volume of telephone recontacts was in particular very low. For this reason, the sample is not large enough to provide robust, reliable information for the incremental economic impact of TIC services on telephone and email enquiries at regional and DPUK level. **The follow-up survey focuses on the findings from walk-in visitors only.**

- To estimate the economic impact of walk-in visitors at regional and DPUK level it was necessary to have up-to-date footfall figures from all 495 TICs across England. In theory this information should have been available from the *EnglandTIC.* However we found that around 40% of TICs were not entering volume data into *EnglandTIC*. Further work was therefore carried out to fill in gaps. Through this work it transpired that some TICs were entering walk-in numbers into the personal enquiry column whilst others were adding it to total throughput. We consulted with the Regional TIC Coordinators to make sense of discrepancies and come up with acceptable total footfall figures.

1.6 Definitions

The following definitions are fundamental to an understanding of the conclusions of this study. These terms may be used differently or given different interpretation in other studies.

Incremental expenditure/spend: in this study this refers to the additional expenditure made by TIC visitors in the destination as a **direct result of visiting the TIC**. It is assumed that this expenditure would not otherwise have occurred. Only expenditure made by tourists are included. This excludes local residents.

Recontacts: in this study this refers to individuals who were recontacted for the purpose of the follow-up survey following their initial contact with the TIC through either email, telephone or as a walk-in visitor.

Walk-in visitors: in this study this refers to visitors who physically enter a TIC for information or other purposes.

2. STUDY METHODOLOGY

The study was divided into two stages. The first stage involved obtaining visitor contact details from the main customer ‘touchpoints’ – walk-ins, email and telephone from a sample of TICs. The purpose of obtaining the contact details was to invite visitors/enquirers to take part in an online survey (stage 2) about the information received from the TIC and the impact (if any) this had on their trip to the area.

In order to obtain information on visitor profiles, trip behaviour and visitor satisfaction levels, and in order to keep the follow-up survey relatively short, a sample of walk-in visitors were also personally interviewed at stage one of the study.

2.1 Stage One

2.1.1 Recruitment of TICs

Stage one of the study began with recruiting TICs into the study. Selection was to be based on the requirement that the sample must adequately represent each region and DPUK category. With assistance from VisitBritain and the Regional TIC Co-ordinators, a total of 62 TICs agreed to take part in the study (see Appendix 1 for list of participating TICs).

The breakdown of the sample by region and DPUK category is provided below.

Region	Number	DPUK category	Number
East of England	6	City 1	9
East Midlands	8	City 2	11
North East	7	City 3	6
North West	8	City 4	3
London	3	Coastal	10
South East	8	London	3
South West	7	Rural North	14
West Midlands	7	Rural South	6
Yorkshire	8		
Total All England	**62**	**Total All DPUK**	**62**

2.1.2. Developing recontact email list

At this initial stage of the research the collection of recontact details was carried out by TIC staff. TIC staff informed the visitor/enquirer of the survey and enlisted their participation to take part in a follow-up online survey. Local residents were not to be included in the sample.

Respondents were informed that they would be contacted within 3 to 5 weeks via email correspondence. Recontact details were gathered from a sample of walk-ins, telephone and email enquiries over the months of August to December 2007 and March to July 2008.

The targets set were as follows:

- 115 telephone enquirer recontacts per TIC (115 x 62 = 7,130 telephone enquirer recontacts in total)
- 115 email enquirer recontacts per TIC (115 x 62 = 7,130 email enquirer recontacts in total)
- 64 walk-in recontacts per TIC (64 x 62 = 3,968 walk-in enquirer recontacts in total)

This would provide a total of 18,228 recontact email addresses to be used for the follow-up survey. A further 1,528 recontacts came from the face-to-face interview survey with walk-in visitors.

2.1.3. Face to face interview survey

To minimise the length of the online survey questionnaire, a separate sample of TIC walk-in visitors were also personally interviewed during stage one of the study to obtain data on visitor profiles, basic information on trip features such as the number of previous trips to the TIC, average expenditure on goods and serviced purchased at the TIC, and satisfaction with various aspects of the service received at the TIC.

In all, 5,456 visitors were personally interviewed at the 62 selected TICs across England over the months of August to December 2007 and March to July 2008.

The sample distribution between the regions and DPUK categories are presented in Table (i) and Table (ii).

Table (i): F2F interview sample by region

All England	5,456	100%
East of England	540	10%
East Midlands	684	13%
North East	732	13%
North West	640	12%
London	418	8%
South East	622	11%
South West	598	11%
West Midlands	599	11%
Yorkshire	623	11%

Table (ii): F2F interview sample by DPUK category

All DPUK	5,456	100%
City 1	727	13%
City2	820	15%
City 3	593	11%
City 4	180	3%
London	418	8%
Coastal	899	16%
Rural North	1084	20%
Rural South	735	13%

A predetermined interviewing schedule was set up to include a set number of weekday and weekend sessions throughout the survey period to ensure a representative sample of visitors were interviewed.

Respondents were randomly chosen as they exited the TIC.

During the interview, respondents were asked about the following (see Appendix 2 for questionnaires):

- Visitor demographics & lifestyle (Ark Leisure segmentation)
- Primary purpose for visiting TIC
- Whether first time visit
- Number of previous visits
- Expenditure at TIC
- Satisfaction with the TIC.

In addition, email addresses were collected from those respondents in the interview who agreed to participate in the second stage of the study. Of the 5,456 interviews conducted 28% (1,528) of respondents provided an e-mail addresses for the follow on survey.

2.1.4. Follow-up survey sample pool

Recontact details provided by the 62 TICs should have led to approximately 18,228 email addresses to be used for the follow-up survey. The actual volume of recontacts was in fact considerably short of this target number.

In total a disappointing 540 telephone recontact details were returned out of the target of 7,130. The collection of email recontact details and walk-in recontact details were more successful. In total 2,669 email recontact details were returned representing 37% of the target of 7,130 email contact details.

3,252 recontact details were obtained from walk-in enquirers representing 82% of the target of 3,968 walk-in recontact details.

With the 1,528 recontact details gathered from the face to face interviews survey, a total of 7,989 recontact email addresses were available to use for the follow-up survey.

The distribution of the customer touchpoint recontact sample by region and DPUK category is presented in table (iii) and Table (iv)

Table (iii) Number of customer touchpoint recontact emails used for online survey participation – by region

	All England	East England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
Walk-in	**3252**	286	218	167	304	474	517	891	321	74
Phone	**540**	38	102	17	56	16	31	157	43	80
Email	**2669**	410	662	61	291	34	387	196	487	141
Total from TICs	**6461**	734	982	245	651	524	935	1244	851	295

Table (iv) Number of customer touchpoint contact details sent for online survey participation – by DPUK category

	All DPUK	City 1	City 2	City 3	City 4	Coastal	London	Rural North	Rural South
Walk-in	**3252**	1117	355	256	8	395	474	131	516
Phone	**540**	212	83	11	1	163	16	33	21
Email	**2669**	563	281	525	32	457	34	322	455
Total from TICs	**6461**	1892	719	792	47	1017	524	539	992

2.2 Stage Two: Follow up online survey

The influence of the information received from TIC staff was assessed at stage two of the research project. An initial invitation to take part in the online survey was emailed to respondents three weeks after receiving walk-in recontact email addresses and at least 5 weeks after receiving telephone and email enquirer recontact details.

The second stage questionnaire collected a variety of information including:

- Whether any of their original plan for their visit/day trip/day out changed as a result of visiting the TIC
- If they spent more time at the destination, how many extra hours or nights was extended by their visit to the TIC
- Whether these changes resulted in them spending more money than they had intended
- An estimation of how much extra they spent on accommodation, eating & drinking, entertainment and travel

For a copy of the questionnaire see Appendix 3.

Over the course of September 2007 to August 2008, 2,713 respondents (out of a sample pool of 7,989) took part in an online survey, a response rate of 34%.

Due to the high cost of recontacting overseas visitors, the follow-up survey involved UK residents only.

Table (v): Sample response rate by customer touchpoint

Customer touch point	No. invited to take part in follow-up survey	No. who completed follow-up survey	Response rate
Walk-in	3252	1187	37%
Phone	540	149	28%
Email	2669	1012	38%
Total from TICs	6461	2367	36%
Face-to-face interview respondents	1528	346	23%
Total (Incl. face to face interview respondents)	7989	2713	34%

Despite the survey sample pool falling well short of the 18,228 set, the response rate on the actual sample was fairly good.

Of the total sample of walk-in contacts, 37% took part in the follow-up survey; 28% of the total telephone contact sample took part in the follow-up survey and 38% the total sample of email contacts took part in the follow-up survey.

Of the 1,527 face-to-face interview respondents agreed to be recontacted for a follow-up survey, 23% completed the online questionnaire.

To increase the response rate the follow-up survey was incentivised with a prize draw and regular email reminders were sent to non-respondents.

Response rate by region and DPUK category are provided below.

Table (vi): Sample response rate by region

	No. invited to take part in follow-up survey	No. who completed follow-up survey	Response rate
All England	**7989**	**2713**	**34%**
East England	869	333	38%
East Midlands	1119	395	34%
North East	366	124	34%
North West	885	249	28%
London	736	205	28%
South East	1110	444	40%
South West	1367	493	34%
West Midlands	1086	360	35%
Yorkshire	451	110	24%

Table (vii): Sample response rate by DPUK category

	No. invited to take part in follow-up survey	No. who complete d follow-up survey	Response rate
All DPUK	**7989**	**2713**	**34%**
City 1	2147	709	33%
City 2	971	320	33%
City 3	921	369	40%
City 4	79	19	24%
Coastal	1244	378	30%
London	736	205	28%
Rural North	745	262	35%
Rural South	1206	454	38%

In the next chapter data gathered from the face-to-face interview survey is presented.

3. SURVEY RESULTS: THE TIC VISITOR

3.1 Who visits TICs?

3.1.1 Trip type

The face-to-face interview survey with a random sample of TIC visitors found that a significant proportion (43%) are local residents.

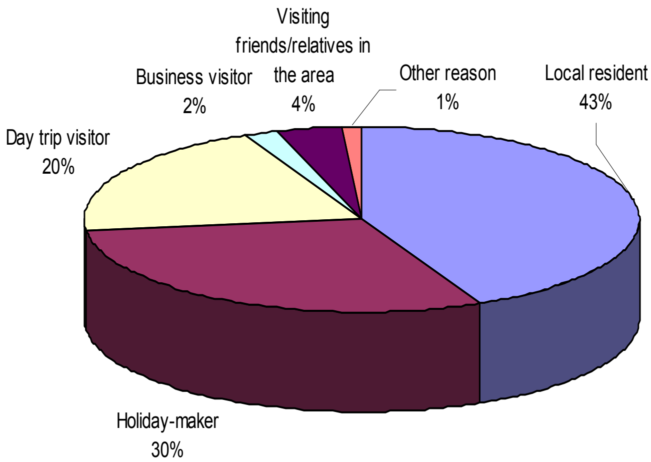
Around a half of all visitors are tourists, of which a third are (30%) holiday-makers and a fifth (20%) are day visitors.

Those visiting friends/relatives in the area represent 4% of TIC visitors.

A small proportion of TIC visitors (2%) are visitors on business trips.

Around 1% of TIC visitors fall into an 'other' category which include visitors who are in the area house hunting, job-hunting/job interview or are on a short course.

Figure 1: Type of trip (All England)



Results split by region reveal that in the East, North East, South East and West Midlands, half or more TIC visitors are local residents.

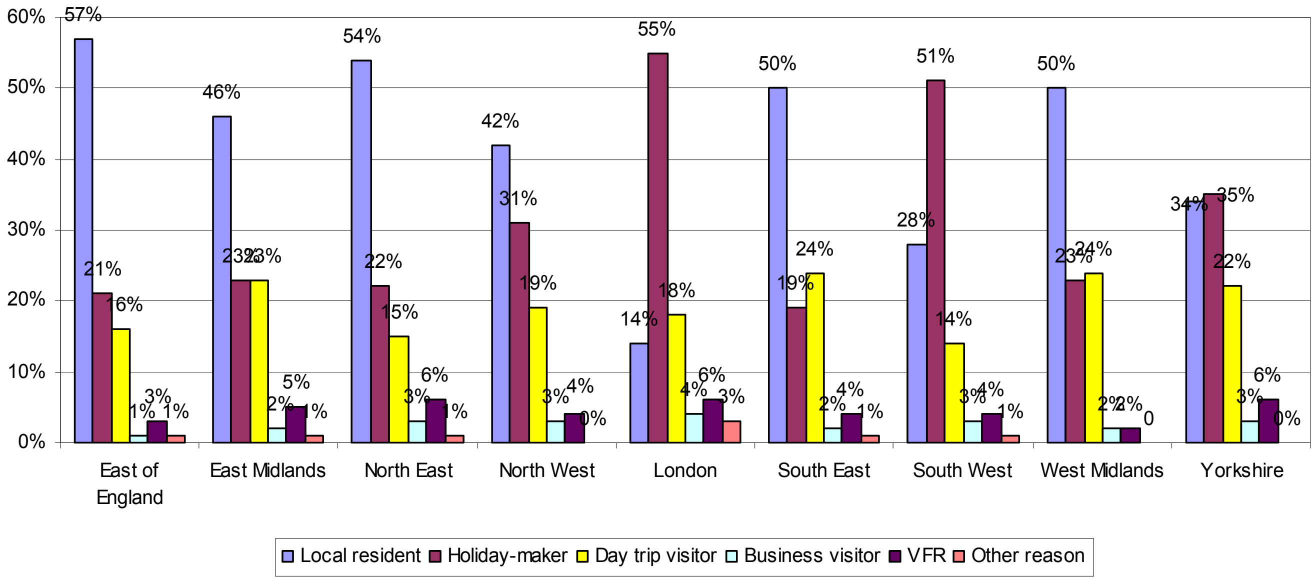
The distribution of visitor type shows a different pattern in London, South West and Yorkshire.

London TICs are primarily visited by tourists, the majority of which are holiday-makers. Seventy-three percent of London TIC visitors are tourists of which 55% are holiday-makers and 18% are day trippers. The volume of use by local residents is relatively low at 14%.

A relatively similar picture is also found among South West TIC visitors, though a relatively higher proportion of visitors are local residents (28%).

In Yorkshire similar proportions of local residents and holiday-makers visit TICs (34% and 35% respectively).

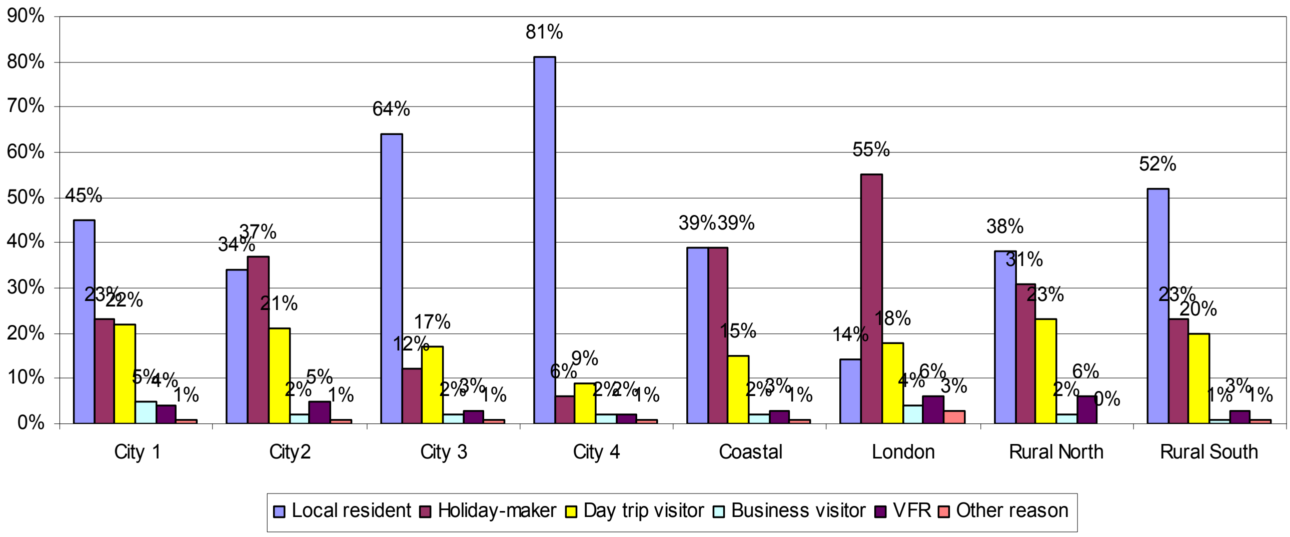
Figure 2a: Type of visitor by region categories



Visitor type patterns differ more widely among DPUK categories. The majority of City 3 and City 4 TIC visitors are local residents, with the proportion of local residents found to be the greatest among City 4 TICs (81%). Just over half of Rural South TICs are local users (52%).

The DPUK category TICs where over half of visitors are holiday-makers and leisure day visitors are City 2 (58%), Coastal (54%) and Rural North (54%). Holiday-makers are consistently the dominant tourist group among these TICs visitors.

Figure 2b: Type of visitor by DPUK categories



3.1.2 Visitor age & size of group

The research shows that 72% of TIC visitors are over the age of 35 years. The age band with the largest proportion of visitors is 55-64 years of age (19%). That said, the proportion of visitors falling in the younger age bands of 35-44 years and 45-54 years, is only marginally smaller.

Table 1: Age band - All England

Visitor age	Males	Females	All
0 - 15	11%	9%	10%
16 - 24	8%	9%	9%
25 - 34	11%	11%	11%
35 - 44	13%	14%	14%
45 - 54	15%	15%	15%
55 - 64	18%	19%	19%
65 - 74	15%	15%	15%
75 +	9%	8%	9%

The age pattern among TIC visitors is relatively consistent across the regions and among DPUK category TIC visitors.

Table 2a: Age bands by regional category - male visiting group members

	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
	569	525	919	809	340	911	533	837	831
0 - 15 male	14%	7%	12%	11%	8%	10%	14%	14%	11%
16 - 24 male	7%	5%	8%	9%	11%	9%	5%	9%	7%
25 - 34 male	12%	9%	9%	10%	17%	11%	10%	9%	12%
35 - 44 male	13%	12%	14%	13%	15%	14%	13%	13%	12%
45 - 54 male	13%	17%	16%	14%	17%	14%	17%	16%	14%
55 - 64 male	15%	22%	17%	17%	17%	17%	18%	17%	19%
65 - 74 male	15%	19%	15%	16%	11%	14%	19%	14%	16%
75 + male	10%	8%	9%	9%	3%	12%	5%	9%	10%

Table 2b: Age bands by regional category - female visiting group members

	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
	718	585	1043	937	413	1067	608	949	939
0 - 15 female	10%	6%	10%	10%	6%	9%	10%	11%	9%
16 - 24 female	9%	5%	9%	9%	15%	9%	6%	9%	9%
25 - 34 female	13%	9%	9%	12%	16%	10%	12%	10%	11%
35 - 44 female	14%	15%	12%	13%	14%	13%	13%	15%	14%
45 - 54 female	14%	17%	16%	14%	20%	14%	15%	15%	15%
55 - 64 female	16%	26%	20%	19%	14%	20%	23%	17%	19%
65 - 74 female	16%	17%	15%	14%	13%	15%	17%	14%	15%
75 + female	8%	6%	9%	9%	2%	10%	4%	9%	8%

Table 2c: Age bands by DPUK category - male visiting group members

	City 1	City2	City 3	City 4	Coastal	London	Rural North	Rural South
	940	1461	791	113	992	340	914	723
0 - 15 male	12%	13%	10%	11%	13%	8%	9%	13%
16 - 24 male	11%	10%	8%	4%	6%	11%	4%	6%
25 - 34 male	13%	12%	10%	9%	9%	17%	7%	9%
35 - 44 male	13%	14%	12%	14%	12%	15%	13%	12%
45 - 54 male	15%	14%	13%	9%	15%	17%	18%	16%
55 - 64 male	15%	15%	17%	23%	17%	17%	24%	19%
65 - 74 male	13%	13%	18%	18%	18%	11%	18%	16%
75 + male	9%	10%	12%	13%	10%	3%	6%	9%

Table 2d: Age bands by DPUK category - female visiting group members

	City 1	City2	City 3	City 4	Coastal	London	Rural North	Rural South
	1027	1677	908	131	1122	413	1045	936
0 - 15 female	9%	11%	9%	6%	11%	6%	8%	9%
16 - 24 female	12%	10%	9%	6%	7%	15%	4%	7%
25 - 34 female	14%	12%	10%	6%	10%	16%	7%	8%
35 - 44 female	14%	14%	12%	13%	11%	14%	16%	14%
45 - 54 female	15%	14%	14%	18%	14%	20%	18%	16%
55 - 64 female	16%	17%	18%	20%	20%	14%	28%	21%
65 - 74 female	13%	13%	17%	21%	17%	13%	15%	16%
75 + female	7%	9%	10%	9%	10%	2%	5%	9%

Nationally, the average size of a visiting party is 2.48.

Table 3a: Ave party size by region

All England	**2.48**
East of England	2.38
East Midlands	1.62
North East	2.68
North West	2.73
London	1.80
South East	3.18
South West	1.91
West Midlands	2.98
Yorkshire	2.84

Table 3b: Ave. party size by DPUK

All DPUK	**2.48**
City 1	2.71
City 3	2.87
City 4	1.36
City2	3.83
Coastal	2.35
London	1.80
Rural North	1.81
Rural South	2.26

3.1.3 Visitor origins

Among the total sample of TIC visitors, 88% are domestic nationals and 12% are overseas nationals.

Across the regions the proportion of TIC visitors from overseas is lower in the East, the Midlands, and the North, with the exception of Yorkshire where the proportion of overseas visitors to is closer to England-wide picture. The proportion of overseas visitors is also lower among rural TICs and City 3 and 4 TICs.

Overseas visitors represent just over half of London TIC visitors.

Table 4a: % of domestic/overseas visitors by regional category

	Base	British Visitor	Overseas Visitor
All England	**5456**	**88%**	**12%**
East of England	540	93%	7%
East Midlands	684	95%	5%
North East	732	96%	4%
North West	640	91%	9%
London	418	47%	53%
South East	622	86%	14%
South West	598	89%	11%
West Midlands	599	95%	5%
Yorkshire	623	89%	11%

Table 4b: % of domestic/overseas visitors by DPUK category

	Base	British Visitor	Overseas Visitor
All DPUK	**5456**	**88%**	**12%**
City 1	727	85%	15%
City2	820	85%	15%
City 3	593	94%	6%
City 4	180	97%	3%
Coastal	899	95%	5%
London	418	47%	53%
Rural North	1084	95%	5%
Rural South	735	94%	6%

3.1.4 Visitor segmentation

The sample was segmented using the ArkLeisure Segmentation model, a model that segments the UK market according to their values and outlook on life.

The results indicate that there are two very different dominant segments among TIC visitors; these are Cosmopolitans and Functionals.

Cosmopolitans are an attractive group for TICs. They tend to come from high income households and are big spenders. They are by nature an active group so when visiting places they like to look for lots of information about what to see and do in an area. Functionals on the other hand are very price focused. When visiting TICs they are typically searching for information which will enable them to get the best value for money out of their trip to the area.

Figure 3: TIC visitor Ark Leisure segmentation (All England)

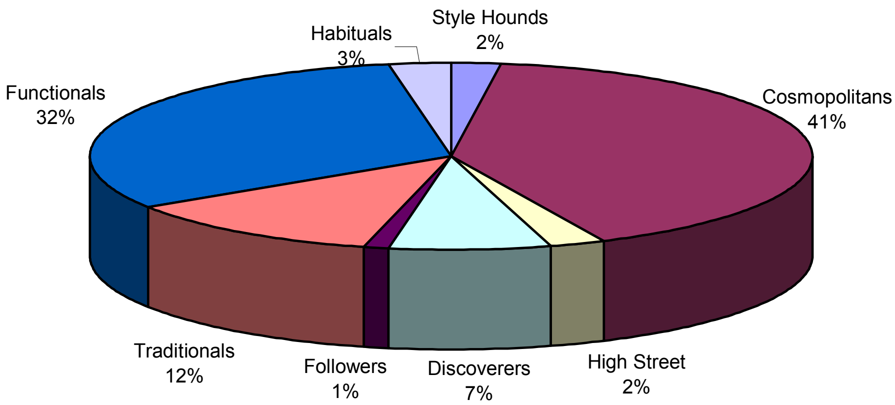


Table 5a: Ark Leisure segments by regional category

	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
	540	684	732	640	418	622	598	599	623
Style Hounds	2%	2%	2%	3%	3%	1%	3%	2%	4%
Cosmopolitans	45%	59%	34%	38%	39%	28%	24%	42%	55%
High Street	2%	4%	2%	3%	2%	2%	2%	3%	2%
Discoverers	5%	6%	9%	8%	8%	6%	11%	5%	6%
Followers	2%	1%	2%	1%	0%	1%	3%	1%	1%
Traditionals	11%	11%	7%	14%	7%	14%	15%	14%	12%
Functionals	31%	16%	42%	30%	40%	45%	37%	31%	19%
Habituals	1%	2%	3%	3%	2%	4%	5%	3%	2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 5b: Table 7a: Ark Leisure segments by DPUK category

	City 1	City2	City 3	City 4	Coastal	London	Rural North	Rural South
	727	820	593	180	899	418	1084	735
Style Hounds	2%	4%	1%	1%	3%	3%	2%	2%
Cosmopolitans	45%	44%	34%	24%	35%	39%	55%	31%
High Street	3%	2%	1%	2%	2%	2%	3%	3%
Discoverers	6%	8%	5%	7%	11%	8%	6%	6%
Followers	2%	1%	1%	1%	1%	0%	1%	2%
Traditionals	10%	11%	14%	14%	13%	7%	10%	14%
Functionals	30%	30%	41%	50%	30%	40%	21%	39%
Habituals	2%	1%	2%	2%	6%	2%	2%	3%
Total	100%	100%	100%	100%	100%	100%	100%	100%

Pen portraits of the two dominant segments are provided below.

Cosmopolitans

Outlook

- Strong, active and confident.
- Do what they want rather than follow any particular fashion.
- Stylish people but it is individuality rather than fashion that is important to them.
- Comfortable trying new things that are out of the ordinary.
- Happy to adopt traditional values when appropriate.
- Early adopters but this is generally based on their personal interest in new products and opportunities rather than on fashion trends. A result of this is that they are early to try out new products, especially in the field of new technology.
- Value and seek functionality in their purchases.
- High-spending market and find it easy to justify buying expensive alternatives.
- To be given individual attention is very important for Cosmopolitans and they are willing to pay for it.
- Are risk takers and this is reflected in their purchases and their desire for things that are new and different. They like new challenges, both physical and intellectual.
- Have an appreciation of art and culture.
- Life for this group is full and active, yet peace and relaxation is still valued in the right circumstances.

Interests and activities

- Personal interests - Cosmopolitans like shopping, cooking and arts and culture.
- Days out and attractions - Cosmopolitans have a slight bias towards heritage and arts or cultural attractions. Their active nature is also reflected in the fact that they have a strong appeal towards days out in the ‘great outdoors’ – this could be visits to a National Park, a walk in the country side or a day at the beach. The atmosphere that they are looking for in a day out is something that is educational and something that is mentally challenging.

- Shopping - Cosmopolitans spend a lot of money on clothes and up market fashion chains (e.g. GAP) are where they are likely to be found. They also like places to shop that have a strong independent sector (e.g. antique shops or specialist shops).
- Eating & drinking - Cosmopolitans are the segment to eat out most often and are drawn to new, self found, or non-chain restaurants. Wine bars are popular for drinking.
- Nights out - Cosmopolitans have a range of nights out that appeal and these include comedy, cabaret, theatre and ballet.
- Media – Into films, news and comedy. Less time spent viewing TV than other segments.
- Holidays – Most likely segment to use the long haul and more independent operators (e.g. Kuoni, Expedia, Trailfinders or cruise operators).
- A good short break for a Cosmopolitan allows them to escape, do their own thing and expand their knowledge or experience.

Demographic profile

- 19% of the GB population
- Even breakdown of ages. 34% under 35; 29% over 55
- 69% have internet access
- 33% have children at home
- 27% single; 51% married/ living as married
- Slight bias towards the higher SEGs; 57% ABC1
- 21% retired

Functionals

Outlook

- Functionals are very resistant to spending and appear pretty self reliant.
- They are very price driven and value functionality strongly over style.
- They are very traditional in their values, and are not prepared to pay for fashion, style or 'individuality'.
- Service is something that they expect as opposed to something they will pay extra for.
- Whilst they are not early adopters they are interested in new experiences, and are happy to try things that are new to them.
- They also enjoy intellectual challenges, arts and culture.

Interests & Activities:

- Personal interests – DIY, gardening, arts & culture.
- Days out and attractions – Interested in heritage attractions. Seeking a nostalgic and somewhat educational experience.
- Shopping – Higher propensity to use the lower cost supermarkets e.g. co-op. Budget clothes shops are used and a low amount spent on clothes purchases.

- Eating & drinking – Lower propensity to eat and drink out compared to other segments. Price & functionality is important. Social clubs or Weatherspoons pubs are favoured drinking establishments (because of their price sensitive nature).
- Nights out – Most likely to be a trip to the cinema or a trip to the theatre.
- Media – Mail & Telegraph are the most popular newspapers. Lowest proportion of all segments owning satellite/ cable TV. Into news, films and comedy.
- Holidays – Most likely to choose a specialist operator or an independent holiday company. Unlikely to use a dedicated internet holiday company but quite likely to book accommodation online & arrange travel themselves. Low frequency of holiday taking and most likely to do a short break in the UK and a longer holiday overseas.

Demographic profile

- 9% of the GB population
- 63% over 45 years
- 50% married; 27% separated or widowed
- 48% working full time; 25% retired
- Average income (most between £20K-£30K)
- High frequency of internet usage.

3.2 Trip features

3.2.1 Visit patterns

The survey found a high level of repeat visitation; 81% of all visitors interviewed had visited the TIC previously. A significantly higher proportion of first time visitors were found among London TIC visitors. Around a third of London TIC visitors were visiting for the first time.

A relatively higher proportion of North West, Yorkshire, City 1 and City 2 TIC visitors were also visiting for the first time compared to the other regions and DPUK category TICs.

Figure 4a: % of first time/repeat visitors by regional category

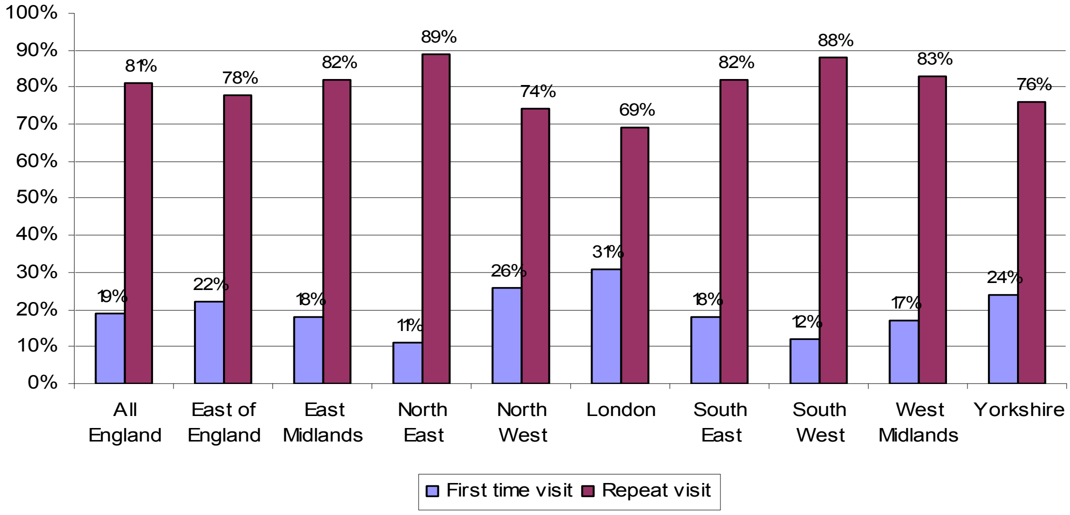
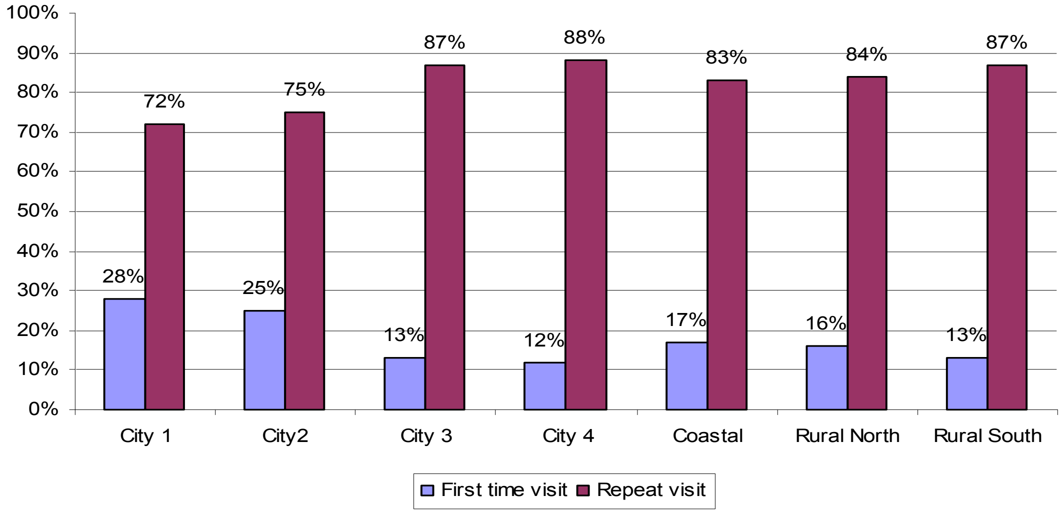


Table 4b: % of first time/repeat visitors by DPUK category



Repeat visitors were asked to indicate the number of previous visits made to the TIC. The survey found that around half of England's TIC visitors had made four or more visits to the TIC in the past 12 months. This pattern was found to be relatively consistent throughout the regions and DPUK categories.

Table 6a: Frequency of previous visits by regional category

	Base	Once before	Twice	Three times	Four times	Five times +	Unsure
All England	**4395**	**11%**	**19%**	**16%**	**11%**	**39%**	**4%**
East of England	421	14%	19%	16%	9%	38%	3%
East Midlands	558	7%	19%	15%	17%	37%	5%
North East	651	10%	16%	16%	9%	43%	6%
North West	472	13%	20%	14%	8%	42%	3%
London	288	16%	22%	12%	9%	31%	10%
South East	512	11%	17%	15%	10%	45%	2%
South West	524	13%	19%	18%	13%	32%	4%
West Midlands	497	13%	17%	13%	11%	41%	4%
Yorkshire	472	8%	23%	17%	11%	36%	4%

Table 6b: Frequency of previous visits by DPUK category

	Base	Once before	Twice	Three times	Four times	Five times +	Unsure
All DPUK	**4393**	**11%**	**19%**	**16%**	**11%**	**39%**	**4%**
City 1	522	11%	16%	17%	12%	38%	6%
City2	615	14%	19%	15%	10%	38%	3%
City 3	514	8%	15%	15%	11%	47%	4%
City 4	159	9%	18%	14%	14%	42%	1%
Coastal	745	13%	23%	16%	10%	33%	4%
London	288	16%	22%	12%	9%	31%	10%
Rural North	910	7%	20%	17%	13%	38%	5%
Rural South	640	13%	17%	13%	10%	44%	3%

3.2.2 Reason(s) for visiting TIC

The study found that ‘obtaining information’ is the main reason why visitors stop at the TIC at some point during their visit to the area. The most popular reason for visiting the TIC among all visitors is to obtain information on visitor attractions in the area (38%). Obtaining information on local attractions is the top main reason stated by TIC visitors across all regions. Just over half (57%) of visitors to London TIC stated this to be the main reason for their visit.

Getting hold of information on local travel and transport services and events are also important reasons for calling in at the TIC. Getting hold of information on accommodation, places to eat, activities to participate in and leisure facilities in the area, are of less importance for walk-in visitors.

The use of TICs as a place to book accommodation or purchase attraction /theatre/event tickets Is relatively low among walk-in visitors. Maps and guidebooks on the other hand are popular purchase items among visitors, particularly among London TIC visitors.

Table 7a: Main reasons for visiting TIC by region

	All England	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
Base	5456	540	684	732	640	418	622	598	599	623
To obtain information on:										
Visitor attractions	**38%**	**22**%	**33%**	**42%**	**43%**	**57%**	**31%**	**38%**	**29%**	**49%**
Accommodation	4%	5%	2%	5%	3%	4%	6%	7%	4%	5%
Places to eat	3%	2%	4%	2%	3%	5%	3%	5%	3%	4%
Walking, cycle, other activity	8%	4%	11%	6%	6%	12%	6%	10%	7%	8%
Events	**14**%	**14%**	**16**%	10%	10%	**22%**	**20%**	**16%**	9%	**15%**
Leisure facilities	6%	7%	9%	5%	5%	3%	5%	8%	4%	4%
General community	8%	**12%**	**10%**	8%	8%	10%	9%	5%	6%	8%
Travel/transport	**16%**	**12%**	**12%**	**18%**	**20%**	**27%**	**15%**	**20%**	**13%**	**12%**
UK holiday information	4%	4%	3%	6%	3%	7%	3%	4%	6%	4%
To ask directions	6%	4%	7%	5%	5%	13%	4%	7%	2%	11%
To book or purchase: -										
Theatre/event tickets	3%	2%	2%	2%	1%	5%	6%	1%	7%	3%
Accommodation	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Attraction entry tickets	2%	1%	0%	0%	2%	3%	1%	4%	3%	2%
Great British Heritage Pass	0%	0%	-	-	0%	1%	-	-	-	0%
Coach/train tickets	2%	5%	3%	2%	2%	3%	1%	2%	2%	1%
Souvenirs/Gifts	8%	9%	8%	9%	7%	4%	12%	5%	7%	6%
Maps, guidebooks	**17%**	**14%**	**13%**	7%	**15%**	**36%**	**20%**	**16%**	**19%**	**22%**
To use another local service (i.e. local council, teashop)	4%	6%	1%	1%	1%	4%	6%	5%	11%	1%

NB: Multiple responses permitted so results to not sum to 100%

Results split by DPUK category reveal that obtaining information on visitor attractions is the most frequently mentioned 'main reason' given by City 1, City 2, City 3, Coastal, Rural North and Rural South TIC visitors, though the proportion stating this reason was smaller for Rural South TICs.

The exception to the norm is City 4 where 16% of visitor gave 'to obtain information on visitor attractions' as their main reason, considerably lower when compared to the other DPUK category TICs. Given that the vast majority of City 4 TIC visitors are local residents, it is not surprising to find that the most popular reasons for visiting are to obtain information on local travel and local transport services in the area and to make use of other services provided by the TIC such as community council services (council tax and housing benefit collection/inquires) and café and tea rooms (where provided).

Table 7b: Main reason for visiting TIC by DPUK category

	All DPUK	City 1	City2	City 3	City 4	Coastal	London	Rural North	Rural South
Base	5456	727	820	593	180	899	418	1084	735
To obtain information on:									
Visitor attractions	**38%**	**33%**	**48%**	**32%**	**16%**	**38%**	**57%**	**43%**	**22%**
Accommodation	4%	3%	6%	5%	3%	6%	4%	4%	2%
Places to eat	3%	3%	5%	3%	1%	3%	5%	2%	4%
Walking, cycle, other activity	8%	8%	5%	5%	4%	4%	12%	11%	11%
Events	**14**%	**19%**	**19%**	**14%**	10%	9%	**22%**	10%	15%
Leisure facilities	6%	8%	4%	4%	11%	7%	3%	5%	4%
General community	8%	7%	9%	10%	3%	8%	10%	9%	8%
Travel/transport	**16%**	**15%**	**14%**	**16%**	**22%**	**21%**	**27%**	**13%**	**12%**
UK holiday information	4%	5%	3%	8%	7%	3%	7%	4%	4%
To ask directions	6%	5%	8%	4%	6%	3%	13%	9%	4%
To book or purchase: -		4%	4%	5%	2%	2%		1%	5%
Theatre/event tickets	3%	0%	0%	1%	1%	1%	5%	1%	1%
Accommodation	1%	1%	2%	2%	1%	2%	1%	1%	3%
Attraction entry tickets	2%	0%	-	-	-	0%	3%	0%	-
Great British Heritage Pass	0%	2%	0%	2%	6%	3%	1%	2%	3%
Coach/train tickets	2%	8%	10%	10%	4%	5%	3%	8%	10%
Souvenirs/Gifts	8%	**22%**	**29%**	8%	3%	9%	4%	12%	17%
Maps, guidebooks	**17%**	1%	3%	1%	-	3%	**36%**	2%	16%
To use another local service (i.e. local council, teashop)	4%	16%	12%	15%	**20%**	16%	4%	14%	15%

NB: Multiple responses permitted so results to not sum to 100%

3.2.3 Other sources of information consulted

All TIC visitors were asked if they had consulted any other source of information prior to their visit and if so to state what these other sources were. A total of 16 sources of information were listed on a show card and visitors were asked to select from the list.

For all regions with the exception of London, most visitors did not consult any other source for trip information. For over a half (57%) of London TIC visitors information was sought from the internet. Overall around 18% of England's TIC visitors searched the internet for trip information.

Around 1% of the overall sample of visitors mentioned a few 'other' sources of information not listed. In most instances this involved local residents who previously looked for information at the local library. Tourists to the area were more likely to mention that they had picked up some information from local shops prior to their visit to the TIC that day.

Table 8a: Information sources by regional category

	All England	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
Base	5456	539	684	732	640	418	622	598	599	623
None	63%	71%	66%	77%	69%	22%	62%	55%	73%	59%
Internet	18%	12%	13%	10%	13%	57%	17%	26%	14%	11%
Family or friends	9%	8%	10%	6%	9%	28%	6%	7%	4%	11%
Travel guides/books	7%	3%	3%	3%	4%	38%	6%	5%	3%	9%
Brochures/leaflets from destination or attraction	5%	4%	3%	4%	5%	10%	4%	6%	5%	7%
Local newspaper/what's on guide	5%	3%	4%	1%	6%	8%	9%	2%	4%	4%
Other sources	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%
Brochures/leaflets at accommodation	2%	2%	2%	2%	2%	3%	1%	4%	1%	3%
Tour/coach operator/ travel agent	2%	0%	1%	1%	1%	4%	0%	3%	1%	4%
National newspaper/magazine travel supplement/ features	1%	1%	1%	0%	1%	4%	1%	2%	1%	2%
Advertisement in newspaper/magazine	1%	1%	1%	0%	1%	2%	1%	0%	1%	2%
Leaflet(s)/ brochure through door	1%	1%	0%	0%	1%	2%	0%	1%	1%	2%
Television or radio travel programmes	1%	0%	0%	0%	0%	5%	0%	0%	1%	1%
Contacted TIC at destination before visit	1%	0%	1%	0%	0%	2%	1%	1%	1%	1%
Contacted Regional Tourist Board	1%	0%	0%	1%	1%	-	0%	0%	1%	1%
Contacted National Tourist Board	0%	0%	0%	0%	1%	1%	-	0%	2%	0%
Contacted local authority tourism department	0%	0%	0%	0%	0%	0%	0%	0%	1%	0%
Teletext	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%

NB: Multiple responses permitted so results do not sum to 100%

Results split by DPUK categories reveal that City 4 TIC visitors are far more unlikely to have searched for trip information from other sources prior to their visit.

Table 8b: Information sources by DPUK category

	All DPUK	City 1	City2	City 3	City 4	Coastal	London	Rural North	Rural South
	5456	727	820	593	180	899	418	1084	735
None	63%	62%	53%	76%	91%	71%	22%	66%	68%
Internet	18%	23%	22%	9%	1%	11%	57%	10%	14%
Family or friends	9%	10%	8%	4%	1%	7%	28%	10%	7%
Travel guides/books	7%	4%	10%	2%	-	2%	38%	4%	5%
Brochures/leaflets from destination or attraction	5%	5%	6%	1%	1%	5%	10%	5%	5%
Local newspaper/what's on guide	5%	5%	7%	5%	1%	2%	8%	3%	5%
Other sources	1%	1%	1%	1%	1%	1%	1%	1%	1%
Leaflet(s)/ brochure at accommodation	2%	1%	3%	1%	-	2%	3%	2%	3%
Tour/coach operator/ travel agent	2%	1%	2%	1%	2%	3%	4%	1%	1%
National newspaper/magazine travel supplement/ features	1%	1%	1%	1%	-	1%	4%	1%	1%
Advertisement in newspaper/magazine	1%	1%	2%	1%	-	0%	2%	1%	0%
Leaflet(s)/ brochure through door	1%	2%	1%	0%	1%	1%	2%	1%	1%
Television or radio travel programmes	1%	0%	0%	-	-	0%	5%	0%	1%
Contacted TIC at destination before visit	1%	1%	1%	0%	1%	0%	2%	0%	1%
Contacted Regional Tourist Board	1%	1%	1%	0%	-	0%	-	0%	1%
Contacted National Tourist Board	0%	1%	0%	0%	-	0%	1%	1%	1%
Contacted local authority tourism department	0%	1%	0%	0%	1%	0%	0%	0%	1%
Teletext	0%	0%	0%	-	-	0%	0%	-	0%

NB: Multiple responses permitted so results do not sum to 100%

3.2.4 Visitor expenditure at TIC

The average spend per visitor figures reported in this section is based on the expenditure by visitors on goods and services purchased at the TIC. **It does not report on the actual sales income received by TICs per visitor.** The latter will be significantly lower than average expenditure per visitor at the TIC as apart from commission, income from sales of bed-nights and tickets will go direct to the respective businesses.

The survey reveals that only a very small proportion of visitors spend money at the TIC itself. The overall results for 'All England' shows that only 2% of all visitors spent money during their visit on booking accommodation, 3% purchased coach/train tickets, 3% purchased theatre/event tickets, 2% purchased entrance tickets to fee paying attractions, and 3% purchased other items. Even when visitor stated that their main reason for visiting the TIC was to buy gifts/souvenirs or maps/guidebooks, more often than not, an actual purchase was not made. Overall 11% of visitors spent money on buying gifts/souvenirs, and 6% spent money buying maps or guidebooks

The average expenditure per person among *spending visitors only* on each item is listed in Table 12a and 12c. The average expenditure per person among all visitors (spending and non-spending) on each item is listed in Table 12b and 12d.

Once expenditure is averaged by the total sample base, the spend per head figures are relatively low. This is clearly illustrated in Table 9. For example, among visitors booking accommodation at the TIC during their visit, the average expenditure on accommodation is £56.56 per visitor. However, once this expenditure is averaged out across all visitors, including those who did not book accommodation, to calculate average spend per head/visitor, the average is reduced to only £1.28 per visitor.

Overall the average spend per visitor at the TIC is £4.08. The study found differences in the average spend figure across the regions and DPUK categories.

The lowest average spend per visitor was found among South West TIC visitors, and average of £0.96 per visitor; and Rural North TIC visitors, an average of £1.52 per visitor.

The highest average spend per visitor was found among North West TIC visitors, and average of £9.27 per visitor; and City 2 TIC visitors, an average of £11.50 per visitor.

Table 9: Ave. expenditure per person at TIC (All England)

Item	Ave spend (spend only)	Ave. spend (all)
Accom. Booking	£56.56	£1.28
Coach/train tickets	£23.56	£0.73
Theatre/event tickets	£20.26	£0.67
Entrance tickets to attractions	£10.58	£0.29
Gifts, Souvenirs etc	£5.20	£0.64
Maps or guidebooks	£2.89	£0.21
Other items	£7.61	£0.26
Total average	-	£4.08

Table 9a: Average expenditure per person at TIC by regional category based on SPENDING SAMPLE ONLY

	Accom. Booking		Coach/train tickets		Theatre/ event tickets		Entrance tickets to attractions		Gifts, Souvenirs etc		Maps or guidebooks		Other items	
	Base	£	Base	£	Base	£	Base	£	Base	£	Base	£	Base	£
All England	**2%**	**56.56**	**3%**	**23.56**	**3%**	**20.26**	**2%**	**10.58**	**11%**	**5.20**	**6%**	**2.89**	**3%**	**7.61**
East of England	1%	41.36	6%	20.08	2%	13.13	3%	8.65	14%	9.19	7%	4.12	6%	5.39
East Midlands	1%	89.00	3%	12.04	1%	38.73	0%	0.00	12%	2.88	10%	2.44	3%	1.42
North East	1%	29.33	3%	19.80	1%	17.19	1%	4.11	12%	2.98	5%	5.05	3%	8.37
North West	5%	57.81	6%	20.87	3%	24.24	2%	10.50	11%	10.80	6%	1.10	2%	7.68
London	1%	42.67	2%	22.73	2%	35.94	1%	36.11	7%	2.66	4%	3.54	3%	1.43
South East	0%	0.00	1%	16.67	5%	15.73	2%	16.95	11%	4.72	5%	3.31	3%	14.42
South West	1%	10.73	2%	11.83	1%	13.17	4%	5.07	10%	1.68	4%	2.25	1%	1.14
West Midlands	1%	45.5	4%	42.06	5%	21.62	2%	12.54	9%	3.60	6%	4.65	3%	4.32
Yorkshire	4%	86.9	3%	32.48	4%	18.44	4%	14.94	13%	8.74	9%	2.34	4%	15.45

Table 9b: Average expenditure per person at TIC by regional category based on TOTAL SAMPLE

		Accom. Booking	Coach/ train tickets	Theatre/ event tickets	Entrance tickets to attraction	Gifts, Souvenirs etc	Maps/ guidebook	Other items	All average
	Base	£	£	£	£	£	£	£	£
All England	**5456**	**1.28**	**0.73**	**0.67**	**0.29**	**0.64**	**0.21**	**0.26**	**4.08**
East of England	540	0.95	1.04	0.41	0.39	1.23	0.25	0.39	4.66
East Midlands	684	0.15	0.27	0.36	0.00	0.38	0.30	0.02	1.48
North East	732	0.34	0.69	0.41	0.09	0.49	0.23	0.30	2.55
North West	640	5.24	1.26	0.73	0.26	1.23	0.12	0.43	9.27
London	418	0.15	0.40	0.76	0.38	0.25	0.15	0.04	2.13
South East	622	0.00	0.05	0.91	0.37	0.55	0.17	0.49	2.54
South West	598	0.13	0.22	0.06	0.27	0.18	0.09	0.01	0.96
West Midlands	599	0.64	1.78	1.41	0.31	0.38	0.29	0.14	4.95
Yorkshire	623	3.80	0.80	1.08	0.65	1.16	0.25	0.56	8.30

Table 9c: Average expenditure per person at TIC by DPUK category based on SPENDING SAMPLE ONLY

	Accom. Booking		Coach/train tickets		Theatre/ Event tickets		Entrance tickets to attractions		Gifts, Souvenirs etc		Maps or guidebooks		Other items	
	Base	£	Base	£	Base	£	Base	£	Base	£	Base	£	Base	£
All DPUK	**2%**	**56.56**	**3%**	**23.56**	**3%**	**20.26**	**2%**	**10.58**	**11%**	**5.20**	**6%**	**2.89**	**3%**	**7.61**
City 1	10%	77.89	39	31.09	24	30.18	7	10.14	85	8.96	34	3.23	15	16.76
City2	57%	59.63	53	23.73	32	18.08	51	13.38	115	7.05	79	2.11	40	8.45
City 3	0%	0	9	19.25	19	15.68	4	17.00	67	6.01	34	3.82	12	9.36
City 4	0%	0	13	24.00	4	26.00	0	0.00	15	4.00	2	5.00	0	0.00
Coastal	6%	11.64	30	19.86	16	17.31	5	8.58	69	5.95	38	3.23	33	2.83
London	1%	42.67	2%	22.73	2%	35.94	1%	36.11	7%	2.66	4%	3.54	3%	1.43
Rural North	5%	34.08	16	13.64	10	27.41	3	11.00	134	2.57	108	2.66	24	5.63
Rural South	5%	45.1	8	18.36	29	9.40	36	4.39	91	4.44	37	4.30	36	10.58

Table 9d: Average expenditure per person at TIC by DPUK category based on TOTAL SAMPLE

	Accom. Booking	Coach/ train tickets	Theatre/ event tickets	Entrance tickets to attraction	Gifts, Souvenirs etc	Maps or guidebooks	Other items	All average
	£	£	£	£	£	£	£	£
All DPUK	**1.28**	**0.73**	**0.67**	**0.29**	**0.64**	**0.21**	**0.26**	**4.08**
City 1	1.19	1.85	1.48	0.11	1.07	0.15	0.28	6.13
City2	6.27	1.41	0.89	0.94	1.05	0.27	0.67	11.50
City 3	0.00	0.27	0.73	0.26	0.68	0.25	0.15	2.34
City 4	0.00	1.95	0.80	0.00	0.46	0.03	0.00	3.24
Coastal	0.08	0.57	0.40	0.10	0.50	0.12	0.10	1.87
London	0.15	0.40	0.76	0.38	0.25	0.15	0.04	2.13
Rural North	0.20	0.19	0.30	0.05	0.41	0.29	0.08	1.52
Rural South	0.35	0.16	0.41	0.32	0.57	0.21	0.49	2.51

3.2.5 Visitor satisfaction

The first stage survey also sought to obtain the opinions of visitors on a range of indicators which together comprise the 'visitor experience' at the TIC. Each indicator was rated on a scale of one to five, where 1='very poor' (or the most negative response) and 5='very good' (or the most positive response), allowing satisfaction scores' (out of 5) to be calculated. It should be noted that the services rated were not all available at every TIC.

The survey found a high level of satisfaction among TIC visitors with nearly all aspects of the visit receiving a mean score of over 4 points out of 5. Among the regional results, the only aspects receiving lower scores were 'Local products on display or for sale' at London TICs (mean score of 3.9) and interactive displays at South East and South West TICs (mean score of 3.9).

Table 10a: Mean rating score by regional category

	All England	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
Overall service received	4.7	4.7	4.8	4.7	4.7	4.6	4.7	4.7	4.8	4.8
Location of TIC/ ease of finding	4.6	4.5	4.7	4.6	4.6	4.5	4.5	4.6	4.5	4.6
Local products on display or for sale	4.5	4.6	4.6	4.6	4.5	3.9	4.1	4.2	4.4	4.6
Interactive displays	4.4	4.6	4.6	4.6	4.4	4.2	3.9	3.9	4.4	4.3
Quality of merchandise	4.5	4.6	4.6	4.6	4.5	4.2	4.3	4.4	4.5	4.7
Range of merchandise	4.5	4.5	4.6	4.6	4.5	4.1	4.3	4.3	4.4	4.6
Provision of up-to-date information	4.7	4.7	4.7	4.7	4.7	4.7	4.6	4.7	4.7	4.8
Range of information	4.7	4.7	4.8	4.6	4.7	4.6	4.6	4.6	4.6	4.8
Staff knowledge/giving advice	4.8	4.7	4.8	4.7	4.8	4.6	4.7	4.8	4.7	4.8
Speed of service	4.7	4.6	4.8	4.7	4.8	4.6	4.7	4.8	4.7	4.8
Friendliness of staff	4.8	4.7	4.8	4.7	4.8	4.7	4.8	4.8	4.7	4.8

Table 10b: Mean rating score by DPUK category

	All DPUK	City 1	City2	City 3	City 4	Coastal	London	Rural North	Rural South
Overall service received	4.7	4.6	4.8	4.8	4.8	4.8	4.6	4.8	4.8
Location of TIC/ ease of finding	4.6	4.4	4.6	4.7	4.7	4.7	4.5	4.5	4.6
Local products on display or for sale	4.5	4.3	4.4	4.6	4.6	4.4	3.9	4.6	4.4
Interactive displays	4.4	4.0	4.1	4.7	4.6	4.2	4.2	4.6	4.6
Quality of merchandise	4.5	4.4	4.5	4.6	4.6	4.6	4.2	4.6	4.6
Range of merchandise	4.5	4.3	4.4	4.6	4.4	4.5	4.1	4.6	4.4
Provision of up-to-date information	4.7	4.5	4.7	4.7	4.7	4.7	4.7	4.8	4.7
Range of information	4.7	4.5	4.7	4.7	4.7	4.7	4.6	4.7	4.7
Staff knowledge/giving advice	4.8	4.6	4.8	4.8	4.7	4.8	4.6	4.8	4.8
Speed of service	4.7	4.5	4.8	4.8	4.8	4.8	4.6	4.8	4.8
Friendliness of staff	4.8	4.6	4.8	4.8	4.8	4.8	4.7	4.8	4.8

4. STAGE 2 SURVEY RESULTS: IMPACT OF TIC ON TRIP BEHAVIOUR

The second stage of the study involved an online survey for those visitors who agreed to be recontacted via email. The survey included only those respondents who had travelled from outside the destination visited. In other words local residents were excluded from the follow-up study.

The purpose of the follow-up survey was to identify what influence the information received from the TIC had on trip behaviour, in particular whether the information received led to increased stay and increased spend.

In total 2,713 TIC visitors and enquires took part in the follow-up survey a response rate of 34%. However, as we are unable to calculate incremental spend for email and telephone enquiries, the analysis is based on results received from walk-in enquirers and those walk-in visitors who were personally interviewed at the TIC only. This leaves us with a sample of 1,533 from a sample pool of 4,780, a response rate of 32%.

The breakdown by region and DPUK categories are presented in the tables below.

Table 11a: Follow-up regional sample based on walk-ins only

East of England	134
East Midlands	111
North East	108
North West	112
London	168
South East	292
South West	322
West Midlands	188
Yorkshire	98
All England	**1533**

Table 11b: Follow-up DPUK sample based on walk-ins only

City 1	392
City 2	187
City 3	127
City 4	13
Coastal	268
London	168
Rural North	129
Rural South	249
All DPUK	**1533**

Please note that the overall sample size is sufficient to produce incremental spend figures for ‘All England’, the sample size at regional level and DPUK level is relatively small. For example, we have only 13 completed questionnaires for City 4. This is wholly inadequate to provide reliable results. Therefore, the results presented in this report needs to be treated with a degree of caution.

4.1 Influence on original travel plans

Of all visitors who stopped at a TIC for information relating to their trip, 46% stated that the information received led to a change in their trip plans.

The research shows that information provided by London and South West TICs, and City 1 TICs had an impact on a far larger proportion of visitors than that provided by TICs located in other regions and in other DPUK categories.

Table 12a: Whether led to changed plans by region

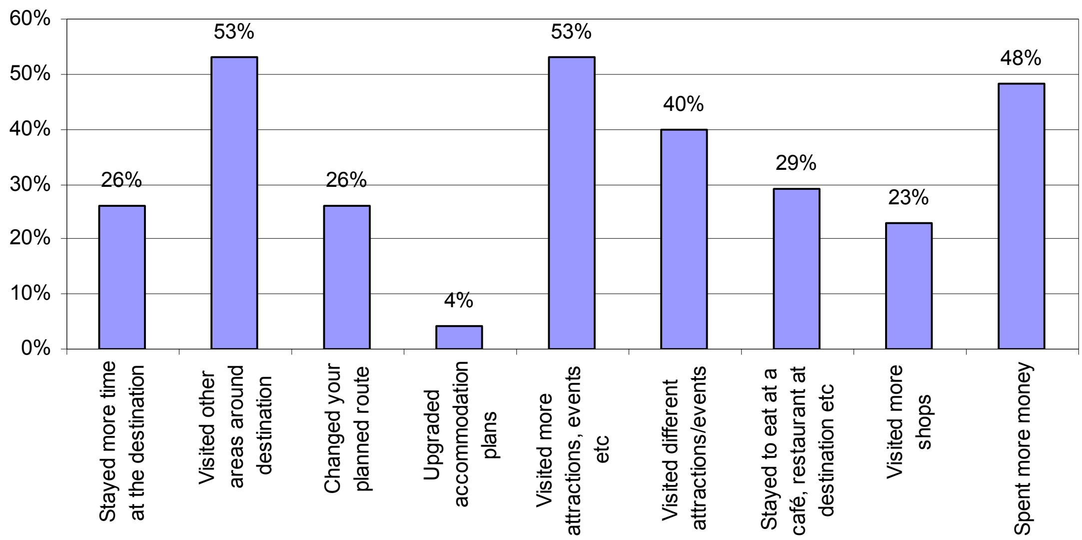
	Base	Yes	No
All England	**1533**	**46%**	**56%**
East of England	134	30%	70%
East Midlands	111	37%	63%
North East	108	45%	55%
North West	112	44%	56%
London	168	62%	39%
South East	292	40%	60%
South West	322	54%	46%
West Midlands	188	41%	59%
Yorkshire	98	43%	57%

Table 12b: Whether led to changed plans by DPUK

	Base	Yes	No
All DPUK	**1533**	**46%**	**56%**
City 1	392	51%	49%
City 2	187	44%	57%
City 3	127	28%	72%
City 4	13	29%	71%
Coastal	268	45%	55%
London	168	62%	39%
Rural North	129	41%	59%
Rural South	249	39%	61%

4.2 Aspects of trip affected

Figure 5: Impact of TIC information on trip behaviour – All England



Overall among all TIC visitors influenced by the information received (46% of all visitors/enquirers); three areas of trip behaviour were the most affected. Over half of TIC enquirers (53%) influenced by the information received stated that the went on to visit others areas around the destination and visit more attractions which they had not previously planned to do so and just under half (48%) stated that as a result of contacting the TIC they went on to spend more money on their trip than originally planned/anticipated.

Results split by region and DPUK category reveal a relatively consistent pattern of behaviours impacted on with' 'Visited other areas around destination', 'Visited more attractions, events etc', and 'Spent more money' as the most common trip aspects.

Table 13a: Impact of TIC information on trip behaviour by region

	Representing	Stayed more time at the destination	Visited other areas around destination	Changed your planned route	Upgraded accommodation plans	Visited more attractions, events etc	Stayed to eat at a café, restaurant	Visited more shops	Spent more money
All England	**46% of all walk-ins**	**26%**	**53%**	**26%**	**4%**	**53%**	**29%**	**23%**	**48%**
East of England	30% of all walk-ins	22%	46%	24%	3%	52%	19%	22%	38%
East Midlands	37% of all walk-ins	21%	56%	24%	8%	55%	31%	27%	59%
North East	45% of all walk-ins	26%	59%	23%	6%	51%	40%	25%	54%
North West	44% of all walk-ins	24%	58%	30%	6%	49%	18%	22%	49%
London	62% of all walk-ins	22%	60%	33%	4%	65%	23%	31%	43%
South East	40% of all walk-ins	36%	52%	23%	3%	47%	36%	29%	59%
South West	54% of all walk-ins	18%	52%	25%	2%	55%	28%	17%	38%
West Midlands	41% of all walk-ins	34%	53%	25%	3%	47%	34%	19%	52%
Yorkshire	43% of all walk-ins	42%	39%	19%	8%	58%	28%	11%	56%

Table 13b: Impact of TIC information on trip behaviour by region

	Representing	Stayed more time at the destination	Visited other areas around destination	Changed your planned route	Upgraded accommodation plans	Visited more attractions, events etc	Stayed to eat at a café, restaurant	Visited more shops	Spent more money
All DPUK	**46% of all walk-ins**	**26%**	**53%**	**26%**	**4%**	**53%**	**29%**	**23%**	**48%**
City 1	51% of all walk-ins	26%	53%	26%	4%	53%	29%	23%	42%
City 2	44% of all walk-ins	21%	52%	28%	4%	58%	25%	21%	63%
City 3	28% of all walk-ins	46%	45%	24%	3%	48%	39%	27%	47%
City 4	29% of all walk-ins	19%	49%	25%	7%	53%	21%	15%	80%
Coastal	45% of all walk-ins	40%	40%	20%	-	60%	40%	20%	45%
Rural South	41% of all walk-ins	19%	55%	21%	4%	47%	33%	21%	47%
Rural North	39% of all walk-ins	31%	54%	23%	7%	43%	36%	24%	55%

4.2.1. Extra time spent during trip

Around a quarter of visitors influenced by the information received at the TIC went on to extend the length of time of their trip. Day visitors extended their trip by an average of 2.35 hours, whilst overnight visitors will extended their trip by an average of 1.01 nights.

Table 14a: Extra hours and nights extended by region

	Representing	Ave. additional hours spent	Ave. no of additional nights spent
All England	**26% of all walk-ins**	**2.36**	**1.01**
East of England	22% of all walk-ins	1.83	1.06
East Midlands	21% of all walk-ins	2.06	1.04
North East	26% of all walk-ins	2.76	0.92
North West	24% of all walk-ins	2.54	1.00
London	22% of all walk-ins	3.00	1.02
South East	36% of all walk-ins	2.39	1.15
South West	18% of all walk-ins	2.25	0.91
West Midlands	34% of all walk-ins	2.48	1.00
Yorkshire	42% of all walk-ins	1.91	1.32

Table 14b: Extra hours extended by DPUK category

	Representing	Ave. additional hours spent	Ave. no of additional nights spent
All DPUK	**26% of all walk-ins**	**2.36**	**1.01**
City 1	26% of all walk-ins	2.35	1.48
City 2	21% of all walk-ins	2.09	0.71
City 3	46% of all walk-ins	2.50	1.23
City 4	19% of all walk-ins	4.25	1.00
Coastal	40% of all walk-ins	2.46	0.51
London	22% of all walk-ins	3.00	1.02
Rural North	19% of all walk-ins	2.52	0.60
Rural South	31% of all walk-ins	1.76	0.99

4.2.2 Additional visitor expenditure

Changes in activity patterns and extension of trip duration have a positive impact on visitor expenditure. As illustrated in Tables 16a/16b (page 38), 48% of visitors who changed their travel behaviour as a direct result of visiting a TIC went on to spend more money.

At national level, just over half of these visitors were staying overnight in the destination (53%) and 47% were day visitors. There are considerable variations in the distribution of overnight and day visitors by region and DPUK category as illustrated in Tables 15a/15b below.

Table 15a: Visitors who spend more money split by type at regional level

	Staying visitor	Day visitors
All England	**53%**	**47%**
East of England	35%	65%
East Midlands	61%	39%
North East	31%	69%
North West	67%	33%
London	74%	26%
South East	30%	70%
South West	71%	29%
West Midlands	51%	49%
Yorkshire	46%	54%

Table 15b: Visitors who spend more money split by type at DPUK level

	Staying visitors	Day visitors
All DPUK	**53%**	**47%**
City 1	59%	41%
City 2	38%	63%
City 3	42%	58%
City 4	20%	80%
Coastal	59%	41%
London	74%	26%
Rural North	61%	39%
Rural South	45%	55%

With regard to the average additional expenditure per visitor, it should also be noted that two average sets of figures are presented in this section. One average figure includes results from the London TICs and the other average figure excludes the influence of London TICs. We have done this in recognition of the fact that high spending London visitors will have the effect of inflating average national expenditure levels. London TIC overnight visitors who spend on average an additional £162.16 per trip, compared to around an additional £50 to £70 on average per trip by visitors in other regions. .

At DPUK level, apart from the London TICs, City 2 TIC overnight visitors go on to spend more money than visitors to other DPUK category TICs.

Table 16a: Ave additional spend by region – staying visitors

	All * England	**All ** England**	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
% of which influenced to spend more	**48%**	**48%**	38%	59%	54%	49%	43%	59%	38%	52%	56%
Accommodation (£)	**12.54**	**10.90**	5.00	13.78	5.36	6.59	30.67	12.13	8.15	22.98	13.21
Eating out (£)	**17.11**	**15.63**	6.37	17.07	16.61	15.75	28.93	12.22	15.51	19.97	21.52
Attractions (£)	**10.11**	**8.16**	9.66	4.51	11.67	6.10	25.71	6.40	10.87	7.06	9.02
Event/theatre (£)	**3.30**	**1.50**	0.00	1.56	6.25	0.00	17.70	0.00	1.36	1.50	1.35
Shopping (£)	**17.42**	**14.00**	16.66	8.94	18.19	15.26	44.76	20.73	9.07	13.81	9.37
Travel/transport (£)	**6.19**	**3.92**	7.91	3.02	0.00	3.99	14.39	0.88	3.38	4.10	8.05
Other (£)	**2.78**	**3.13**	5.20	2.71	1.67	2.64	0.00	0.99	2.54	1.08	8.19
Ave. extra spend	**69.45**	**57.24**	50.80	51.59	59.75	50.33	162.16	53.35	50.88	70.50	70.71

All England – with London results*
*All** England – without London results*

Table 16b: Ave additional spend by DPUK category – staying visitors

	All DPUK*	**All DPUK****	City 1	City 2	City 3	City 4	Coastal	London	Rural North	Rural South
% of which influenced to spend more	**48%**	**48%**	42%	63%	47%	80%	45%	43%	47%	55%
Accommodation (£)	**12.54**	**10.90**	22.95	25.00	16.00	4.75	13.84	30.67	13.70	10.38
eating out (£)	**17.11**	**15.63**	17.13	20.26	14.38	7.75	11.45	28.93	19.07	12.26
Attractions (£)	**10.11**	**8.16**	8.75	11.90	7.40	3.75	8.6	25.71	4.06	8.35
Event/theatre (£)	**3.30**	**1.50**	1.90	2.38	0.62	1.25	0.00	17.7	0.57	1.11
Shopping (£)	**17.42**	**14.00**	11.81	13.76	15.31	6.50	10.14	44.76	8.23	21.57
Travel/transport (£)	**6.19**	**3.92**	7.060	4.89	1.56	3.25	2.27	14.39	2.37	4.77
Other (£)	**2.78**	**3.13**	2.59	3.19	1.44	26.25	2.00	0.00	2.49	2.83
Ave. extra spend	**69.45**	**57.24**	72.19	81.38	56.71	53.5	48.3	162.16	50.49	61.27

All DPUK– with London results*
*All DPUK**– without London results*

The research finds that day visitors will spend on average an additional £15.53 per person per trip. Expenditure is again highest among London TIC day visitors who spend on average an additional £31.60 per trip.

At DPUK level, apart from the London TICs, City 1 TIC day visitors go on to spend more money than visitors to other DPUK category TICs.

Table 17a: Ave additional spend by region – day visitors

	All* England	**All** England**	East of England	East Midlands	North East	North West	London	South East	South West	West Midlands	Yorkshire
% of which influenced to spend more	**48%**	**48%**	38%	59%	54%	49%	43%	59%	38%	52%	56%
Eating out (£)	**5.18**	**4.65**	4.29	3.67	7.58	7.43	9.40	4.15	3.58	2.24	4.29
Attractions (£)	**2.58**	**2.03**	0.91	3.30	2.24	2.46	7.00	2.18	3.36	0.88	0.91
Event/theatre (£)	**1.97**	**1.51**	0.00	0.80	4.69	0.00	5.72	1.82	0.60	4.13	0.00
Shopping (£)	**5.87**	**5.80**	4.44	3.67	4.73	16.91	6.40	4.98	3.64	3.60	4.44
Travel/transport (£)	**1.12**	**0.87**	0.09	0.67	0.89	0.69	3.08	0.51	2.83	1.20	0.09
Other (£)	**0.59**	**0.67**	0.65	0.53	0.38	0.40	0.00	0.84	0.54	1.34	0.65
Ave. extra spend	**17.31**	**15.53**	10.38	12.64	20.51	27.89	31.60	14.48	14.55	13.39	10.38

All England – with London results*
*All** England – without London results*

Table 17b: Ave additional spend by DPUK category – day visitors

	All DPUK*	**All DPUK****	City 1	City 2	City 3	City 4	Coastal	London	Rural North	Rural South
% of which influenced to spend more	**48%**	**48%**	42%	63%	47%	80%	45%	43%	47%	55%
eating out (£)	**5.18**	**4.65**	6.26	5.86	5.15	2.50	4.84	9.40	1.85	3.41
Attractions (£)	**2.58**	**2.03**	3.50	2.22	2.81	0.87	1.95	7.00	1.58	1.09
Event/theatre (£)	**1.97**	**1.51**	1.81	2.40	1.12	1.33	0.00	5.72	1.74	1.40
Shopping (£)	**5.87**	**5.80**	5.29	3.46	1.36	3.62	2.95	6.40	1.48	1.75
Travel/transport (£)	**1.12**	**0.87**	1.24	0.44	0.29	0.67	0.28	3.08	0.37	1.40
Other (£)	**0.59**	**0.67**	0.70	0.87	0.78	0.87	0.76	0.00	0.60	0.81
Ave. extra spend	**17.31**	**15.53**	18.8	15.25	11.51	9.86	10.78	31.6	7.62	9.86

All DPUK– with London results*
*All DPUK**– without London results*

Shopping and food and beverages are the main items additional expenditure goes towards (around 25% of additional expenditure respectively). Interestingly for staying trips, additional expenditure on accommodation is lower at around 18% of total additional expenditure.

There are two main reasons for this. One is that not all the spending population in this group will have spent additional money on accommodation as a proportion will have been staying in the homes of family and friends. Secondly, as illustrated in Tables 14a/14b the extension of trip length is an average of one night only (page 37).

Shopping items and food and beverages are also the main additional purchases among day visitors.

Figure 6a: Distribution of additional overnight visitor expenditure – All England

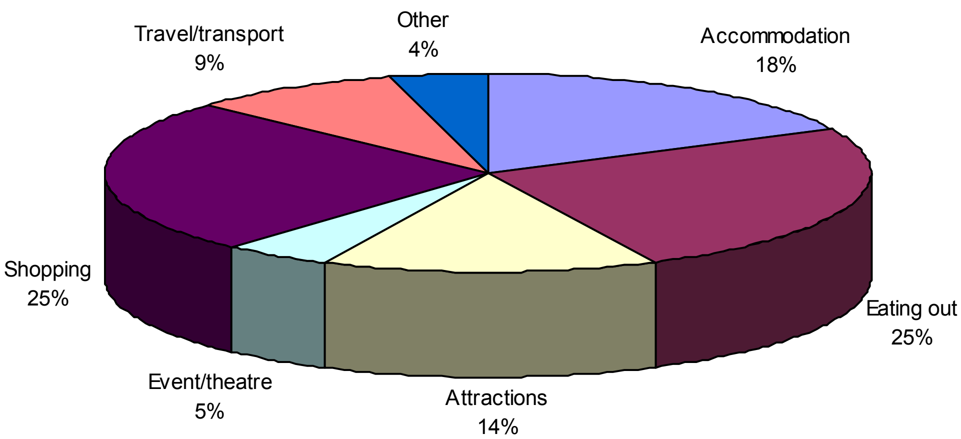
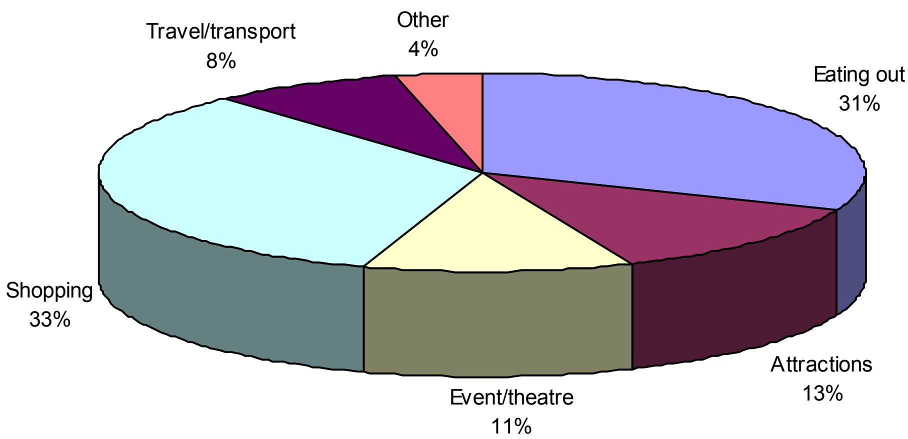


Figure 6b: Distribution of additional day visitor expenditure – All England



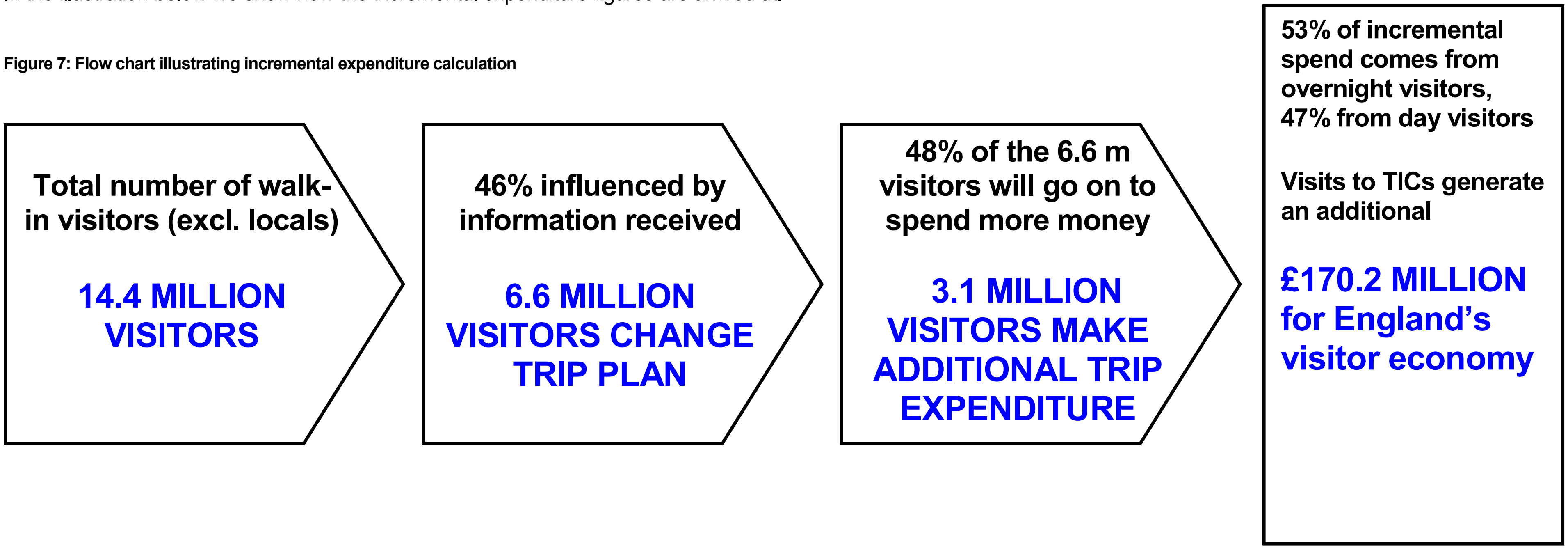
4.2.3 Incremental visitor expenditure

The expenditure data is used to calculate the total incremental visitor expenditure generated by TICs. Having established the average expenditure per visitor for each region and DPUK category, the figures are multiplied by the total number of TIC visitors.

Prior to the process of calculating impact it is essential to start from a robust and agreed figure of visitor numbers. Data gathered for this study found that approximately 25 million people visited TICs in England in 2008, of which 43% were local residents. To estimate net economic impact it is necessary to remove local residents from the calculations.

In the illustration below we show how the incremental expenditure figures are arrived at.

Figure 7: Flow chart illustrating incremental expenditure calculation



Based on the results of this study it is estimated that approximately £170.2 million incremental visitor spend was generated by TICs across England. The results for each region and DPUK category are presented below.

Table 18a: Incremental expenditure generated by TICs at regional level

	Total estimated walk-ins	Estimated % of locals	No of walk-ins excl. locals	% influenced by TIC	Total visitors influenced	% of which spend more money	Total visitors who spend more money	% of overnight visitors	% of which day visitors	Total overnight visitor additional expenditure	Total day visitor additional expenditure	Total all visitor additional expenditure
England	**25,377,809**	**43%**	14,465,351	**46%**	**6,654,062**	**48%**	**3,193,950**	**53%**	**47%**	**146,654,144**	**23,644,921**	**170,299,064**
East of England	1,782,676	57%	766,551	30%	229,965	38%	87,387	35%	65%	1,553,737	589,599	2,143,335
East Midlands	835,105	46%	450,957	37%	166,854	59%	98,444	61%	39%	3,098,018	485,289	3,583,307
North East	1,001,568	54%	460,721	45%	207,325	54%	111,955	31%	69%	2,073,692	1,584,380	3,658,071
North West	3,134,458	42%	1,817,986	44%	799,914	49%	391,958	67%	33%	13,217,245	3,607,461	16,824,706
London	2,000,000	14%	1,720,000	62%	1,066,400	43%	458,552	74%	26%	55,025,506	3,767,463	58,792,970
South East	4,095,939	50%	2,047,970	40%	819,188	59%	483,321	30%	70%	7,735,549	4,898,940	12,634,489
South West	8,002,026	28%	5,761,459	54%	3,111,188	38%	1,182,251	71%	29%	42,708,593	4,988,509	47,697,102
West Midlands	1,612,345	50%	806,173	41%	330,531	52%	171,876	51%	49%	6,179,801	1,127,695	7,307,496
Yorkshire	2,913,692	34%	1,923,037	43%	826,906	56%	463,067	46%	54%	15,062,003	2,595,585	17,657,587

Table 18b: Incremental expenditure generated by TICs at DPUK level

	Total approx. walk-ins	Estimated % of locals	No of walk-ins excl. locals	% influenced by TIC	Total visitors influenced	% of which spend more money	Total visitors who spend more money	% of overnight visitors	% of which day visitors	Total overnight visitor additional expenditure	Total day visitor additional expenditure	Total all visitor additional expenditure
All DPUK	**25,377,809**	**43%**	14,465,351	**46%**	**6,654,062**	**48%**	**3,193,950**	**53%**	**47%**	**146,654,144**	**23,644,921**	**170,299,064**
City 1	3,193,392	45%	1,756,366	51%	895,746	42%	376,214	59%	41%	16,023,724	2,899,854	18,923,577
City 2	5,712,685	34%	3,770,372	44%	1,658,964	63%	1,045,147	38%	63%	32,320,548	10,041,251	42,361,800
City 3	1,361,740	64%	490,226	28%	137,263	47%	64,514	42%	58%	1,525,764	430,681	1,956,445
City 4	570,403	81%	108,377	29%	31,429	80%	25,143	20%	80%	266,771	198,331	465,102
Coastal	5,890,536	39%	3,593,227	45%	1,616,952	45%	727,628	59%	41%	20,735,228	3,215,972	23,951,200
London	2,000,000	14%	1,720,000	62%	1,066,400	43%	458,552	74%	26%	55,025,506	3,767,463	58,792,970
Rural North	2,256,862	38%	1,399,254	41%	573,694	47%	269,636	61%	39%	8,271,607	801,305	9,072,912
Rural South	4,392,191	52%	2,108,252	39%	822,218	55%	452,220	45%	55%	12,468,383	2,452,389	14,920,772

5. CONCLUSION & RECOMMENDATION FOR FURTHER RESEARCH

Tourist Information Centres make a significant economic contribution to tourism, by providing information to visitors that encourages them to stay longer, experience more attractions, and spend more money. This study has established that around 46% of TIC walk-in visitors were positively influenced by the information received at the TIC with almost half of these visitors going on to spend more money on local goods. Overnight visitors spent on average £57.24 per person per trip and day visitors spent on average £15.53 per person per trip more than originally planned. Of this, the largest expenditures were on shopping and eating out. Overall £170.2 million additional visitor expenditure was generated by TICs through the information they provided to visitors.

This study is unable to quantify the level of incremental visitor expenditure generated by each of England's 495 TICs. Clearly some TICs will be more effective in generating incremental visitor expenditure than others. To help TIC managers assess their relative performance in contributing to the local visitor economy, we highly recommend the development of a self-diagnostic toolkit which will enable TICs to replicate a version of this study at an individual TIC level. The toolkit will enable TIC managers to assess the influence of their TIC on:

- Encouraging visitors to visit more attractions/places of interest which they had not planned to do so/were unaware of
- Encouraging visitors to visit attractions/places of interest when they had previously made no plans to visit any
- Encouraging visitors to stop and eat in local cafés/restaurants
- As the result of the above – encouraging visitors to spend more time in the area
- As the result of the above – encouraging visitors to spend more money in the area

The focus in this study has been on the impact of the TIC on the local visitor economy. This focus should not let us lose sight of the role TICs play in acting as a stimulus for visitor expenditure elsewhere in the country. For example, a visitor may pick up information from a local TIC which ultimately inspires them to visit another destination in England. To assess this aspect a future study should attempt to establish the proportion of visitors encouraged to visit other destinations.

A further enhancement of this study would be to track the conversion of email and telephone enquiries received by TICs into actual visits to the destination. This was in fact part of the original brief but due to the small number of email and telephone recontacts available to us we were unable to complete this part of the study. We recommend that this aspect of TIC performance is reviewed in a future study.

We also recommend further research to measure the impact of TICs on the spending of local residents. As already noted earlier in this report, TICs may be playing a critical role in persuading residents to stay in the community and spend locally. For example, a resident who is hosting visiting friends or relatives over a weekend may drop by the local TICs to find out about local attractions to visit during their stay. The range and quality of information provided by TIC staff may encourage the local resident to entertain their visiting friends or relatives entirely in their home town rather than drive to attractions and places to eat in another town. The toolkit may act as a method through which information on local resident spending impacts can be assessed.

Future research should also consider non-monetary impacts of TICs. Many TICs, especially those located in small towns and rural locations may create significant social benefits by operating as an important community facility.

APPENDICES 1: LIST OF PARTICIPATING TICs

TIC	Region	DPUK Category
Bristol (Harbourside)	SW	City 1
Cambridge	EE	City 1
Derby	EM	City 1
Leeds	Y	City 1
Manchester	NW	City 1
Morpeth	NE	City 1
Newcastle-Upon-Tyne	NE	City 1
Nottingham	EM	City 1
Portsmouth (The Hard)	SE	City 1
Canterbury	SE	City 2
Chester	NW	City 2
Durham	NE	City 2
Harrogate	Y	City 2
Leamington Spa	WM	City 2
Lincoln	EM	City 2
Medway (Rochester)	SE	City 2
Norwich	EE	City 2
Salisbury	SW	City 2
Stratford Upon Avon	WM	City 2
York	Y	City 2
Carlisle	NW	City 3
Chesterfield	EM	City 3
Guildford	SE	City 3
Ipswich	EE	City 3
Sunderland	NE	City 3
Tamworth	WM	City 3
Doncaster	Y	City 4
Rotherham	Y	City 4
Wolverhampton	WM	City 4
Blackpool	NW	Coastal
Burnham on Sea	SW	Coastal
Harwich Connexions TIC	EE	Coastal
Lancaster	NW	Coastal
Lowestoft	EE	Coastal
Scarborough	Y	Coastal
Sedgemoor	SW	Coastal
Southport	NW	Coastal
Whitehaven	NW	Coastal
Worthing	SE	Coastal
Britain & London Visitor Centre	London	London
City of London	London	London
Greenwich	London	London

Alnwick	NE	Rural
Bakewell	EM	Rural
Bewdley	WM	Rural
Bodmin	SW	Rural
Burton upon Trent	WM	Rural
Buxton	EM	Rural
Clitheroe	NW	Rural
Helmsley	Y	Rural
Hexham	NE	Rural
Lewes	SE	Rural
Malvern	WM	Rural
Marlow	SE	Rural
Matlock	EM	Rural
Mid Suffolk (Stowmarket TIC)	EE	Rural
Pickering	Y	Rural
Ripley	EM	Rural
Romsey	SE	Rural
Stanhope	NE	Rural
Taunton	SW	Rural
Tewkesbury	SW	Rural

APPENDICES 2: COPY OF STAGE 1 QUESTIONNAIRE

NATIONAL TOURIST INFORMATION CENTRE SURVEY - TIC NAME

TIC code: xx **Date:___________** **Interviewer initials:………**
DPUK code: xx **Region Code: xx**

Weekday -1 **Weekend -2**

Good morning/afternoon. I am working for Tourism South East, the Regional Tourist Board. We are carrying out a survey of visitors to this Tourist Information Centre on behalf of VisitBritain, the national tourism agency. Would you be able to spare me 10 minutes to answer some questions?

Record refusals here: *1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20*

1. Which of the following best describes your situation?
READ OUT LIST. CIRCLE ONE ONLY

I live in this area	-1
I am on holiday	-2
I am on day out/day trip from home (and returning home same day)	-3
I am on business	-4
Visiting friends/relatives in this area	-5
Other (*specify*) __________________	-6

2. Where do you live?

Home town………………………………………

County……………………………………………

Country (if overseas)……………………………..

Postcode (UK resident only):
☐☐☐☐ ☐☐☐

3. Please can you tell me why you visited < NAME TIC> today ?
SHOW CARD 1. CIRCLE ALL THAT APPLY

To obtain information on:

Visitor attractions	-1
Accommodation	-2
Places to eat	-3
Walking, cycling, other activity guides	-4
Events	-5
Leisure facilities	-6
General community information	-7
Travel/transport information	-8
UK holiday information	-9
To ask directions	-10

To book or purchase:

Theatre/event tickets	-11
Accommodation	-12
Attraction entry tickets	-13
Great British Heritage Pass	-14
Coach/train tickets	-15
Souvenirs/Gifts	-16
Maps, guidebooks	-17

To use:

Another service (i.e local council, teashop, museum)	-18
Other	-19

4a. Is this the FIRST TIME you had ever visited a tourist information centre?

Yes – it is my first visit	-1	**Continue to Q5**
No	-2	**Go to Q4b**

4b. If NO, how many times have you visited a tourist information centre in the past 12 months?

Once before	-1
Twice	-2
Three times	-3
Four times	-4
5 times or more	-5
Unsure/unable to say	-6

5. Which other sources of information did you consult BEFORE you arrived at your destination and visited <NAME TIC>?

SHOW CARD 2. CIRCLE ALL THAT APPLY.

Family or friends	-1
Brochures/leaflets from destination or attraction	-2
Leaflet(s)/brochure through door	-3
Leaflet(s)/brochure at accommodation	-4
Internet	-5
Local newspapers/what's on guide	-6
National newspaper/magazine travel supplement/features	-7
Advertisement in newspaper/magazine	-8
Television or radio travel programmes	-9
Contacted TIC at destination before visit	-10
Contacted National Tourist Board	-11
Contacted Regional Tourist Board	-12
Contacted local authority tourism department	-13
Travel guides/books	-14
Teletext	-15
Tour /coach operator/travel agent	-16
Other	-17
None	-18

6. How would you rate the following aspects of the service you received at <NAME TIC>?

SHOW CARD 3

Very poor	-1	Good	-4
Poor	-2	Very Good	-5
Average -	-3	Don't know	-6

	Very poor	Poor	Ave	Good	Very good	Don't know
Friendliness of staff	-1	-2	-3	-4	-5	-6
Speed of service	-1	-2	-3	-4	-5	-6
Staff knowledge/ability to make recommendations or suggestions	-1	-2	-3	-4	-5	-6
Range of information	-1	-2	-3	-4	-5	-6
Provision of up to date information	-1	-2	-3	-4	-5	-6
Range of merchandise	-1	-2	-3	-4	-5	-6
Quality of merchandise	-1	-2	-3	-4	-5	-6
Interactive displays	-1	-2	-3	-4	-5	-6
Local products on display or for sale	-1	-2	-3	-4	-5	-6
Location of TIC / ease of finding	-1	-2	-3	-4	-5	-6
Overall service received	-1	-2	-3	-4	-5	-6

7a. Please can you tell me how much you spent in total during your visit to <NAME TIC> TODAY. (WRITE in 0 IF DID NOT SPEND ON ITEM)

Accommodation booking	£…………
Coach/train tickets	£…………
Theatre/event tickets	£…………
Entrance tickets to attractions	£…………
Gifts, souvenirs etc	£…………
Maps or guide books	£…………
Other (Specify below)	£…………

____

7b. And how many people do these amounts cover?

8. <u>Including yourself, how many people in your immediate party are male and female, and which of these age groups do they fall into?</u> SHOW CARD 4 – WRITE IN NUMBER.

Please mark the interviewee with an asterisk but include in number.

	Age	Male	Female
A	0-15		
B	16-24		
C	25-34		
D	35-44		
E	45-54		
F	55-64		
G	65-74		
H	75+		
	Refused -1		

<u>ASK UK RESIDENTS ONLY</u>

The next questions are designed to tell us about your personal values and can help us to understand more about what you consider when deciding where to go for holidays and days out.

9. Please indicate the extent to which you are prepared <u>to pay more for</u> the following characteristics of a service or holiday product. SHOW CARD 5

means that you <u>would not</u> be prepared to pay more, whilst 10 means you <u>would</u> efinitely be prepared to pay more.	Not Pay 0	1	2	3	4	5	6	7	8	9	Pay More 10
To be given individual attention	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
For products that use the most advanced technology	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
For a fashionable brand	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Refused						-1					

10. Please tell me the extent to which you agree or disagree with each statement on a scale of 0 – 10 SHOW CARD 6

means you strongly disagree. 10 means you strongly agree.	Disagree 0	1	2	3	4	5	6	7	8	9	Agree 10
I like to try things that are new to me	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
I am happy to do my own thing regardless of what others might think	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
I prefer to live a relaxed and moderate pace of life	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
I find it easy to justify buying expensive alternatives	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Arts and culture are an important part of who I am	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
I have a fond liking for things that others might describe as old fashioned	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Function is more important than style	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Refused						-1					

<u>11. Can we contact you to take part in a more in-depth survey, by email in a few weeks time?</u>

Your details will only be used for research purposes. This information will only be used for the purpose stated and will not be shared amongst third parties

Name (Please write in Mr/Mrs/Miss etc)………………………………….

Email address **(UK + OVERSEAS)** ……………………………………………………

Refused follow up survey -1

<u>12. Finally, solely to assist with random back checking of questionnaires, may we contact you by telephone? I should emphasise again that this information will be treated in the strictest confidence and will only be used for back checking purposes.</u>

Yes -1 Home Tel No. (inc. STD code) ……………………….
Refused -2
Overseas -3

THANK YOU FOR YOUR TIME

APPENDICES 3: COPY OF STAGE 2 QUESTIONNAIRE

EnjoyEngland Tourist Information Centre Visitor Survey

Dear TIC Visitor,

We're conducting a survey on behalf of the national tourism body, VisitBritain, amongst people who visited or contacted a Tourist Information Centre (TIC) recently. You may recall that you recently visited or contacted a TIC and gave permission for us to re-contact you for research purposes? Do you have 10 minutes to answer some questions about your last visit to a TIC?

As a thank you for helping us with this survey you will be entered into a prize draw for your chance to win…., so please be sure to include your contact details before submitting your questionnaire!

TIC CODE: [ ] DPUK CODE: [ ] RESPONDENT REF NO. [ ]

REGION CODE: [ ]

S1 Please tell us how you contacted the TIC Tick one response only

By telephone	-1	)	
By email	-2	)	[ROUTE TO Q1]
By post/fax	-3	)	
Visited in person	-4		[ROUTE TO Q5]
Don't recall visiting TIC	-5	GO TO THANK YOU & CLOSE SCREEN	

[ROUTING: ANSWERED CODES 1,2,3 AT S1]

Q1 When you contacted the TIC, had you ALREADY booked or made firm plans for any holidays, short breaks or days out AT THAT PARTICULAR DESTINATION? Please tick any that apply

Yes – holiday(s) or short break(s) including one or more nights stay	-1	ROUTE TO Q5 & Q7
Yes – day trip(s) from home	-2	ROUTE TO Q5 & Q7
No – none of the above		-3

Q2 Since contacting the TIC have you taken any holiday trips, short breaks or day trips to THAT PARTICULAR DESTINATION?

Yes – took holidays(s) or short break(s) including one or more nights stay	-1	ROUTE TO Q3a
Yes – day trips from home	-2	ROUTE TO Q4a
No – none of the above	-3	ROUTE TO Q14a

Q3a As a result of contacting/visiting the TIC, did you take any holiday trips or short breaks in that destination? Please write in the number taken. [ ]

Q3b How many nights did your most recent break last in total? [ ]

Q3c How many adults and children were in your party including yourself, on your most recent break? [ ]

Q4a As a result of contacting/visiting the TIC, did you take any day trips in that destination? [ ]

Q4b How many adults and children were in your party including yourself, on your most recent day trip?

Q5 Before visiting the TIC had you already made firm plans for the following?

	Not planned	Some plans	Definite plans
Accommodation	-1	-2	-3
Attractions	-1	-2	-3
Tours/sightseeing	-1	-2	-3
Events	-1	-2	-3
Restaurants/places to eat	-1	-2	-3

Q6 As a result of your visit to TIC/contacting the TIC did you change any of your original plans for your visit? Please tick all that apply.

[MULTIPLE RESPONSE]

Stayed more time at the destination	-1		[ROUTE TO Q8]
Stayed less time at the destination	-2	)	
Visited other areas around destination	-3	)	
Changed your planned route	-4	)	
Upgraded accommodation plans	-5	)	
Changed accommodation plans, same standard	-6	)	
Visited more attractions, events etc	-7	)	[ROUTE TO Q9]
Visited different attractions/events	-8	)	
Visited fewer attractions/events	-9	)	
Stayed to eat at a café, restaurant at destination etc	-10	)	
Other (please specify)	-11	)	
No changes	-12	)	
Unsure/Don't know	-13	)	

Q7 How many EXTRA hours or days did you extend your visit by?

If you are unsure please write in an estimate or put in a '0' if no extra time was spent.

Hours (day visitors only – round to nearest 15 minutes)		odes 2-4 at Q5
Days (overnight visitors only)		Codes 5-8 at Q5

Q9 Did these changes result in you spending more or less money than you had intended? Please tick one answer only.

[SINGLE RESPONSE]

Spent more money	-1	[ROUTE TO Q10a]
Spent less money	-2	
Made no difference	-3	
Unsure	-4	

Q8a Please estimate how much MORE (EXTRA) you spent on the following:

Estimate the amounts to the nearest whole £, including 0 if you spent nothing EXTRA on any category. If you can't remember how much you spent on any category please leave the box BLANK.

We would like to know about additional spend (i.e. that would not have happened if you hadn't changed your plans as a result of visiting the TIC)

Extra spent on accommodation	£
Extra spent on eating out (i.e. cafes, pubs, restaurant)	£
Extra spent on admission to attractions	£
Extra spent on event/theatre tickets	£
Extra spent on shopping	£
Extra spent on transport (around destination)	£
Extra spent on other items (include car parking)	£
Don't know/can't recall/refused	-1
Q8b And how many people was this for?	

Q9 [ROUTING:SKIP UNLESS Q1=2, or Q2 = 2 OR Q5 = 2, 3 OR 4] How many hours did you spend IN TOTAL on your day trip to that destination? Please found to the nearest quarter hour.

Q10 [ROUTING:SKIP UNLESS Q1 = 1, or Q2 =1 or Q5= 5,6,7,or 8] How many nights did you spend away from home IN TOTAL on your most recent trip at that destination?

Q11 How much did you spend IN TOTAL on any of the following during your trip:

Please estimate amounts to the nearest whole, including 0 if you spent nothing on any category. If you can't remember how much you spent on any category please leave the box blank.

Accommodation — Please leave blank if on day trip & returning the same day

Eating out (in cafés and restaurants etc)

Visits to attractions, events & other entertainment

Shopping

Travel & transport

Other expenditure

Number of people this expenditure relates to

Q12a Where would you like to find out local information whilst you are on holiday/on a day visit. Please tick 3 answers only

TIC – Town Centre	-1
TIC – Motorway services	-2
Local post office	-3
Local shops	-4
Accommodation establishments	-5
Attractions	-6
Information kiosks/panels	-7
Internet	-8
Mobile phone	-9
Other	-10
Don't access information	-11

Q12b Were there any other products and/ or services that were not available at the Tourist Information Centre that you would have liked to have found? (ROUTING S1 = 4)

Yes	-1	Specify
No	-2	
Don't know	-3	

Q13a How useful was the information that you received from the TIC you contacted?

	Not useful at all				Very useful	Did not receive any information
	-1	-2	-3	-4	-5	-6

Q13b How likely are you to:?

	Very unlikely				Very likely	Don't know
Make a return visit to that area	-1	-2	-3	-4	-5	-6
Recommend friends or relatives to visit the area	-1	-2	-3	-4	-5	-6
Use another Tourist Information Centre in the future	-1	-2	-3	-4	-5	-6

Q14a How would you rate the following aspects of the service you received at the TIC you visited? ROUTING: SKIP UNLESS S1 =1 OR 2 OR 3

	Very poor	Poor	Ave	Good	Very good	Don't know
Friendliness of staff	-1	-2	-3	-4	-5	-6
Speed of service	-1	-2	-3	-4	-5	-6
Staff knowledge/ability to make recommendations or suggestions	-1	-2	-3	-4	-5	-6
Range of information	-1	-2	-3	-4	-5	-6
Provision of up to date information	-1	-2	-3	-4	-5	-6
Range of merchandise	-1	-2	-3	-4	-5	-6
Quality of merchandise	-1	-2	-3	-4	-5	-6
Interactive displays	-1	-2	-3	-4	-5	-6
Local products on display or for sale	-1	-2	-3	-4	-5	-6
Location of TIC / ease of finding	-1	-2	-3	-4	-5	-6
Overall service received	-1	-2	-3	-4	-5	-6

And finally please tell us about yourself:

Q15 In which of the following age categories are you?

16 – 24	-1
25 – 34	-2
35 – 44	-3
45 – 54	-4
55 – 64	-5
65 – 74	-6
75+	-7

Q16 Are you: Male -1 Female -2

Q17 Where do you live?

Country (if overseas) (Drop down list)

County (UK Resident) (Drop down list)

Postcode (UK resident only):

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ROUTING: SKIP UNLESS S1 = 1 OR 2 OR 3 & Q19 NOT OVERSEAS

The next questions are designed to tell us about your personal values and can help us to understand more about what you consider when deciding where to go for holidays and days out.

Q18 Please indicate the extent to which you are prepared to pay more for the following characteristics of a service or holiday product.			
0 means that you would not be prepared to pay more, whilst 10 means you would definitely be prepared to pay more.		Not Pay Pay More 0 1 2 3 4 5 6 7 8 9 10	
To be given individual attention			
For products that use the most advanced technology			
For a fashionable brand			
Refused			

Q19 Please indicate the extent to which you agree or disagree with each statement on a scale of 0 – 10			
0 means you strongly disagree. 10 means you strongly agree.		Disagree Agree 0 1 2 3 4 5 6 7 8 9 10	
I like to try things that are new to me			
I am happy to do my own thing regardless of what others might think			
I prefer to live a relaxed and moderate pace of life			
I find it easy to justify buying expensive alternatives			
Arts and culture are an important part of who I am			
I have a fond liking for things that others might describe as old fashioned			
Function is more important than style			

Thank you for taking the time to complete out survey.

Please record your name and email address below to be entered into our Prize Draw to win…. Winners will be chosen at random on DATE and contacted by email within 3 days. Prize Draw terms and conditions are given below.

Name:

Email address

:

APPENDICES 4: DPUK CLASSIFICATION

City One: Renaissance cities: post-industrial cities (not obviously historic or traditional) using tourism marketing and development for regeneration

City Two: Small historic cities with a strong emphasis on heritage, culture, shopping and year-round tourism

City Three: Smaller regional hub locations with populations of 80,000-150,000. Majoring on historic, rural and industrial attractions. Very active in tourism, all with TICs

City Four: Large, mainly urban. Towns and cities with populations over 200,000. Historically, economies have tended to be based upon heavy industry and manufacturing. Geographically, tend to be in Midlands or North

Coastal One: Major coastal resorts with significant bed stock, branded under one resort name. Local authorities with a significant rural or urban stretch of coastline with one or more main seaside towns/small resorts plus a sizeable rural hinterland with market towns and/or villages

Coastal Two: Comprising single or multiple, small to medium-sized resorts with a significant rural and/or historic urban area. Resort-orientated local authorities with the majority of tourism activity and economic wealth generated by the resort(s). Coastal with rural hinterland

Coastal 1 and 2 now form part of one DPUK group

Rural: Destinations that are rural in nature but may have coastline. Districts tend to have low populations and contain small, little-known market towns with few major attractions. They promote themselves as a mix of countryside pursuits, arts, literature and heritage

- **North** – Southernmost counties: Lincolnshire, Nottinghamshire, Derbyshire, Staffordshire, Shropshire, Denbighshire, Gwynedd
- **South** – Northernmost counties: Norfolk , Cambridgeshire, Rutland, Northhamptonshire, Leicestershire, Warkwickshire, West Midlands , Worcestershire, Herefordshire, Powys, Ceredigion