

# Forest of Dean and Wye Valley

## 2015 Marketing Evaluation

### Draft Report

Produced by:  
The South West Research Company Ltd

On behalf of:  
Wye Valley and Forest of Dean Tourism Association

March 2016



# Contents

|  |    |
|--|----|
| Summary Report                                   | 3  |
| Introduction                                     | 10 |
| Key Results                                      | 14 |
| Estimating the Wider Value of Internet Visits    | 20 |
| Estimating the Wider Value of Printed Literature | 23 |
| Combined Outputs and Return on Investment        | 26 |
| All Recalling 2015 Visitor Information           | 29 |
| Visitors   | 34 |
| Non-Visitors                                     | 46 |
| All Respondents                                  | 47 |

# Summary Report – Background

In 2015 the Wye Valley and Forest of Dean Tourism Association undertook an integrated marketing campaign covering a number of different communication methods and promotional sources. The main focus of all the marketing activity was to drive consumers to request visitor information, or to visit the Wye Valley and Forest of Dean website to source information, and ultimately generate visits to the county in 2015 and beyond.

The 2015 marketing campaign included things such as the promotion of the area through regular e-newsletter correspondence with consumers, radio and online advertisements and downloadable brochures available through the website.

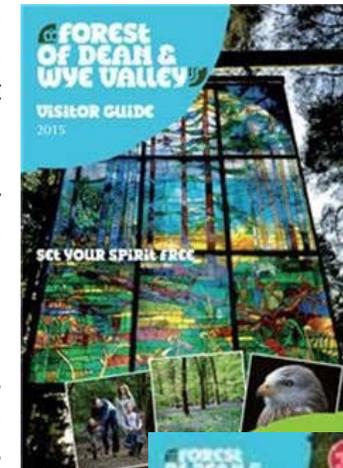
The Wye Valley and Forest of Dean Tourism Association also produced three main pieces of promotional printed literature; the Visitor Guide, the Eating Out Guide and Attractions and Activities Guide. The guides were designed to not only inform visitors on all aspects of their visit but also to stimulate and influence potential visitors to visit the area. The guides were promoted using a number of different marketing methods and could be requested online and through Tourist Information Centres. Approximately 2,000 copies of the guides were distributed to potential visitors requesting the guide during 2015 and a further 10,800 guides were downloaded directly from the website.

The results contained in this report refer to information requesters as described above but in the case of the guides, actual distribution was far greater overall with further guides distributed through other methods (an additional approximate 26,000 Visitor Guides, 6,000 Eating Out Guides and 23,000 Attractions and Activities Guides outside of the Wye Valley and Forest of Dean) and as a result further estimates have also been made to include the bulk distribution of printed material to understand the true value of the printed information.

In addition, potential visitors also received visitor information relating to the Wye Valley and Forest of Dean through e-newsletters. The total number of email contacts held for information requesters (guides and e-newsletters) was 35,000.

This report provides a combined evaluation of the impact that the marketing had upon those receiving the visitor information and downloading brochures online in terms of the numbers of holidays taken, visit and visitor characteristics, visitor spend generated and the return on investment generated.

It should also be noted that this research also does not take into account any future impacts on visits due to the 2015 marketing activity. For example, it is likely that a proportion of influenced new visitors during 2015 will turn into regular repeat visitors giving a much longer term value to the 2015 marketing activity.



# Summary Report – Methodology

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had requested visitor information and provided their email. The approved evaluation questionnaire, which mirrors core questions used by VisitBritain and which is approved by the National Audit Office, explored a number of areas including:

Consumers' situation about holidaying or taking a day visit in the Wye Valley and Forest of Dean prior to receiving information (plans to holiday/visit); their situation after (holidays and day visits taken or booked); number of holidays and day visits taken or booked; where they stayed, when they visited and length of stay; how much of an influence was the information in deciding to visit the area; consumers' use of the Wye Valley and Forest of Dean website ([www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk)).

In addition, estimates have also been made in this report as to the value of unique visitors to the Wye Valley and Forest of Dean website in two stages;

1. Unique visitors who were likely to have been exposed to the same or similar visitor information as the survey sample.
2. A wider estimate of unique visitors to the Wye Valley and Forest of Dean website during the campaign period (excluding those included in the first stage) to allow an estimate of all 2015 marketing activity to be made.

The assumptions used in the internet estimates are included in detail within this report. Whilst these figures should be treated as best estimates they should provide a safe base from which to work and are likely to underestimate the true value of the website.

This report also refers to group day visits in the findings. It should be noted that this term refers to the respondent and their immediate group that were visiting the Wye Valley and Forest of Dean for the day and should not be confused with organised trade travel groups.

## Summary Report - Final Key Results – Combined Overview

The final estimates, adjusted to allow for non-response bias, for those requesting information, or viewing it online, along with estimates for other unique visitors to the Wye Valley and Forest of Dean website and the bulk distribution of guides are summarised in the following table.

|   | <b>Information Requesters/<br/>Online Viewers</b> | <b>Other Internet Unique Visits<br/>Estimates</b> | <b>Bulk Guide Distribution<br/>Estimates</b> | <b>Total</b>      |
|---|---|---|--|-------------------|
| Value of influenced holidays/day visits     | £2,234,615  | £1,212,604  | £204,390                                     | <b>£3,651,609</b> |
| Added value of extended influenced holidays | £4,282  | £2,323  | £399   | <b>£7,004</b>     |
| Total influenced value                      | £2,238,896  | £1,214,928  | £204,789                                     | <b>£3,658,613</b> |

**An estimated £3.7 million pounds was influenced through the Wye Valley and Forest of Dean 2015 marketing activity. Using the widely used and accepted national estimate of £50,000 visitor expenditure being required to generate a full time equivalent (FTE) job equates to 73 FTE's supported by the marketing activity.**

## Summary Report - Return on Investment – Combined Overview

The figures in the table below, adjusted to allow for non-response bias, show the financial return achieved for those requesting information, or viewing it online, along with other unique visitors to the Wye Valley and Forest of Dean website and the bulk distribution of guides in relation to the monies invested.

|   | <b>Information Requesters/<br/>Online Viewers</b> | <b>Other Internet Unique Visits<br/>Estimates</b> | <b>Bulk Guide Distribution<br/>Estimates</b> | <b>Combined</b> |
|---|---|---|--|-----------------|
| Marketing spend                                   | £77,000   | £7,000  | Included in information requesters total     | £84,000         |
| Value per £ holiday/day visit influenced          | £29.02  | £173.23   | £2.65  | £43.47          |
| Value per £ extended holiday influenced           | £0.06   | £0.33   | £0.01  | £0.08           |
| Combined value per £ spent (Return on investment) | £29.08  | £173.56   | £2.66  | £43.55          |

**'Value per £' shows how much money was generated for each marketing pound spent.**

**The table shows that Wye Valley and Forest of Dean 2015 marketing activity overall generated an estimated £43.55 for each marketing pound spent.**

# Summary Report - Those Receiving 2015 Visitor Information

- 55% of all respondents recalled sourcing information through an e-newsletter, 49% through the Wye Valley and Forest of Dean website and 37% recalled sourcing information through a visitor guide.
- The Wye Valley and Forest of Dean Visitor Guide was used by the large majority of those using a visitor guide (92%) with the Attractions and Activities Guide the next most used (47%). Just 15% of those using a visitor guide had used the Wye Valley and Forest of Dean Eating Out Guide.
- 10% of respondents had already booked a visit to the Wye Valley and Forest of Dean at the time of receiving the 2015 visitor information.
- 45% of respondents had either taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean at the time of the survey.
- 95% of those taking holidays and 96% of those taking day visits stated that the 2015 visitor information or any subsequent visits to the Wye Valley and Forest of Dean website had a degree of influence in their decision to visit the area.
- The primary usage amongst all visitors using the Visitor Guide and social media was to source information.
- Across all information sources, the majority of respondents in each case indicated that they had helped them 'a lot' or 'somewhat' in planning their visit.
- The majority of respondents using the Wye Valley and Forest of Dean guides and Facebook page felt they each provided all of the information that they were looking for including 88% using the Eating Out Guide and 77% in each case using the Visitor Guide and Attractions and Activities Guide.
- Approximately four fifths of all visitors (82%) had visited the Wye Valley and Forest of Dean website with the large majority using it to source information for their visit.

# Summary Report - Those Receiving 2015 Visitor Information

- An average of 1.76 holidays were taken or booked in the Wye Valley and Forest of Dean amongst visitors influenced by the information they had received. The average number of nights for all influenced holidays was 3.69 with the average number of people being 2.58.
- An average of 3.23 day visits were taken amongst those visitors influenced by the information with an average of 2.76 persons per visit for an average duration of five hours and twenty five minutes.
- 41% of all staying visits were taken before the peak period of July/August when a further 21% were taken. 23% of staying visits were taken between September to December with the remaining 17% booked for months after 2015. This suggests that the 2015 marketing was successful in stimulating holidays in the shoulder season when they are probably most needed by the local industry.
- 22% of day visits were taken before the July/August peak period, 34% were taken during the peak period with a further 40% taken between September and December. 4% of day visits were planned/booked for months after 2015. This again demonstrates that good levels of trips outside of the period were stimulated by the 2015 marketing.
- 33% of visitors chose serviced accommodation for their visit (9% Hotel and 24% B&B/Guest House), with Self-catering (23%), Camping/Touring caravan (16%) and Holiday centre/park/camp (12%) being the next most popular choices.
- More than a third of staying visitors (35%) booked holidays with accommodation providers featured in the 2015 Wye Valley and Forest of Dean Visitor Guide. In terms of value this would equate to approximately £1m of accommodation spend being spread amongst those accommodation businesses featured in the guide, clearly demonstrating the value of participation top businesses.
- 49% of visitors stated that their visit to the Wye Valley and Forest of Dean matched their expectations but, more importantly, half of all visitors said that their expectations exceeded.
- Whilst 78% of non-visitors had taken a holiday elsewhere in 2015 just 9% of these had chosen their destination in direct preference to a holiday in the Wye Valley and Forest of Dean.
- Just 8% of all respondents have ruled out visiting the Wye Valley and Forest of Dean in 2016.

## Summary Report – Conclusions

The 2015 marketing evaluation shows a successful year for the Wye Valley and Forest of Dean Tourism Association with positive results throughout. The results clearly demonstrate that there is still a demand for quality printed literature amongst consumers to use either as a stand alone resource or alongside information obtained from the internet. Indeed, the findings from this project show that the majority of guide users and information receivers also go on to use the Wye Valley and Forest of Dean website. The results also clearly show not only a sizeable return for the investment required to generate the guides and visitor information resources, but also the influence that they have on converting possible visitors into actual ones.

The guides were well received by visitors providing a largely comprehensive information resource which it is safe to assume was easy for visitors to use based on the feedback received. It should also be noted that the guides were used by many visitors who were not actually influenced to visit by the literature itself. Whilst additional holidays were not generated through these visitors the provision of a quality information resource is highly likely to have enhanced the visitor experience which will lead to subsequent repeat visits and word of mouth promotion of the area. The feedback received for other visitor information sources was also generally good.

It remains our opinion that the future of the guides and visitor information generally should be assured as long as the opinions of users remain positive and it continues to demonstrate a suitable return on investment. It could be assumed that this opinion is shared by businesses featured in the guide who, according to the findings, would appear to receive a significant amount of business as a result of their involvement. A further consideration is that it would be extremely difficult to evaluate marketing activity in the future without such activities and publications that require people to provide their contact details. These in turn provide a valuable research resource to give an insight into the success or failure of any subsequent marketing activity and to help steer future strategies.

Overall, the Wye Valley and Forest of Dean's marketing activity in 2015 should be considered a success generating in excess of £3.6 million pounds in direct visitor expenditure for the area and providing a healthy return of approximately £44 for every pound invested in marketing.

# Introduction – Background

In 2015 the Wye Valley and Forest of Dean Tourism Association undertook an integrated marketing campaign covering a number of different communication methods and promotional sources. The main focus of all the marketing activity was to drive consumers to request visitor information, or to visit the Wye Valley and Forest of Dean website to source information, and ultimately generate visits to the county in 2015 and beyond.

The 2015 marketing campaign included things such as the promotion of the area through regular e-newsletter correspondence with consumers, radio and online advertisements and downloadable brochures available through the website.

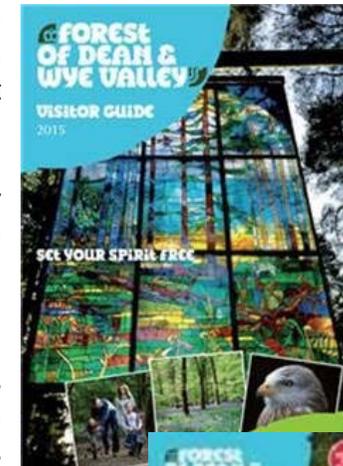
The Wye Valley and Forest of Dean Tourism Association also produced three main pieces of promotional printed literature; the Visitor Guide, the Eating Out Guide and Attractions and Activities Guide. The guides were designed to not only inform visitors on all aspects of their visit but also to stimulate and influence potential visitors to visit the area. The guides were promoted using a number of different marketing methods and could be requested online and through Tourist Information Centres. Approximately 2,000 copies of the guides were distributed to potential visitors requesting the guide during 2015 and a further 10,800 guides were downloaded directly from the website.

The results contained in this report refer to information requesters as described above but in the case of the guides, actual distribution was far greater overall with further guides distributed through other methods (an additional approximate 26,000 Visitor Guides, 6,000 Eating Out Guides and 23,000 Attractions and Activities Guides outside of the Wye Valley and Forest of Dean) and as a result further estimates have also been made to include the bulk distribution of printed material to understand the true value of the printed information.

In addition, potential visitors also received visitor information relating to the Wye Valley and Forest of Dean through e-newsletters. The total number of email contacts held for information requesters (guides and e-newsletters) was 35,000.

This report provides a combined evaluation of the impact that the marketing had upon those receiving the visitor information and downloading brochures online in terms of the numbers of holidays taken, visit and visitor characteristics, visitor spend generated and the return on investment generated.

It should also be noted that this research also does not take into account any future impacts on visits due to the 2015 marketing activity. For example, it is likely that a proportion of influenced new visitors during 2015 will turn into regular repeat visitors giving a much longer term value to the 2015 marketing activity.



## Introduction – Approach

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had received visitor information from the Wye Valley and Forest of Dean Tourism Association in 2015 and had provided their email address.

The approved evaluation questionnaire, which mirrors core questions used by VisitBritain and which is approved by the National Audit Office, explored a number of areas including:

Consumers' situation about holidaying or taking a day visit in the Wye Valley and Forest of Dean prior to receiving information (plans to holiday/visit); their situation after (holidays and day visits taken or booked); number of holidays and day visits taken or booked; where they stayed, when they visited and length of stay; how much of an influence was the information in deciding to visit the area; consumers' use of the Wye Valley and Forest of Dean website ([www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk)).

The online survey was issued to all contacts held in the Wye Valley and Forest of Dean Tourism Associations' email contact database during January 2016.

A total of 294 survey responses were received providing a usable sample for analysis purposes in line with the margins of error detailed in this report. The proportions displayed in this report are those taken directly from survey data. However, due to the sample for those visiting being much smaller (117), with increased margins of error, the survey data has been adjusted to produce the financial outputs in this report to ensure that the final figures are not over estimates. This has been carried out by applying the appropriate margin of error at its lowest level to the survey proportions.

## Introduction – Outputs

The results of the online survey were analysed to illustrate how effective the 2015 integrated marketing activity (including the provision of visitor information) was.

Conversion ratios were established (how many respondents were influenced by the information to visit the area) and applied to the total number of people who recalled receiving the visitor information.

The influence of the 2015 visitor information is defined by respondents who stated that the information they received had either definitely, probably or possibly turned a possible visit into a certainty. Weightings have then been applied to the results for those respondents so that the responses of those definitely influenced were fully included in the calculations, a 50% weighting was applied to those probably influenced and a 20% weighting applied to those possibly influenced.

Those who were not influenced to visit the Wye Valley and Forest of Dean by the information were asked the same question to establish if the information had influenced them to extend their visit in the area. The same weightings were then applied to those respondents who were influenced to extend their visit.

This report also refers to group day visits in the findings. It should be noted that this term refers to the respondent and their immediate group that were visiting the Wye Valley and Forest of Dean for the day and should not be confused with organised trade travel groups.

## Introduction – Statistical Reliability

When reading this report it is important to bear in mind that all sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered. The table below shows the margins within which one can be 95% certain that the true figures will fall (assuming the sample is random) for a variety of research findings.

| <b>Research findings</b> | <b>All respondents (294)<br/>(Margin % +/-)</b> | <b>All respondents recalling<br/>the information (264)<br/>(Margin % +/-)</b> | <b>All respondents visiting<br/>(117)<br/>(Margin % +/-)</b> |
|--------------------------|---|---|--|
| 10% or 90%               | <b>+/- 3.4%</b>                                 | +/- 3.6%  | +/- 5.4%   |
| 20% or 80%               | <b>+/- 4.6%</b>                                 | +/- 4.8%  | +/- 7.2%   |
| 30% or 70%               | <b>+/- 5.2%</b>                                 | +/- 5.5%  | +/- 8.3%   |
| 40% or 60%               | <b>+/- 5.6%</b>                                 | +/- 5.9%  | +/- 8.9%   |
| 50%                      | <b>+/- 5.7%</b>                                 | +/- 6.0%  | +/- 9.1%   |

The figures shown are at the 95% confidence limits. Thus, for example for all respondents, we can be 95% certain that for those questioned with a result of 50%, the true percentage range is between 44.3% to % 55.7%.

## Key Results – Those receiving visitor information

Top line results from the online survey applied to the total number of contacts who had received visitor information show that:-

A total of 3,498 holidays were **taken or booked** and influenced by the marketing (equating to 30,280 visitor nights) .

With a total value of £1,751,074.

Equating to a value of £501 per holiday.

A further 45 holidays were **extended** due to the influence of the marketing (equating to 85 visitor nights).

With a total value of £4,905.

Equating to an added value of £108 per holiday extended.

A total of 9,382 group day visits were **taken** and influenced by the marketing (equating to 26,174 individual day visits).

With a total value of £808,784.

Equating to a value of £86 per group day visit.

**Resulting in a value of £2,564,762 which is attributable to the 2015 marketing activity.**

## Key Results - Viewing information through [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk)

As more and more of our marketing and promotional campaigns become linked to the internet and encourage visits to a website, it is increasingly important to place a value on the levels of business that websites generate. Although research continues in this area the depth of information required to do this is currently largely unavailable leaving an informed estimate of the value of web visits as the best alternative.

The Wye Valley and Forest of Dean website [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk) was a key element of the 2015 marketing activity with all aspects of the marketing containing details of the website address. What is unknown is the influence that the website had on visitors during the marketing campaign who did not register their details for information but did visit the website. It is very likely that the website influenced people to contact their area of interest or accommodation direct, either by internet or telephone.

While there are no means of reaching this group of people to ascertain their trip taking, we can look at the numbers of unique visitors to the website and their use of the site and then apply ratios from the current marketing evaluation to estimate the total value of their visits to the site. To ensure that a safe base has been used for this purpose conversion ratios have been applied to unique website visitors who downloaded a brochure (approximately 6,700 unique brochure downloads). We can be reasonably sure that these website visitors have been exposed to the same marketing material as the survey sample so it would be reasonable to assume similar behaviours amongst them.

The outputs produced are shown overleaf and although figures should be treated as no more than estimates they are likely to underestimate the true value of the Wye Valley and Forest of Dean site and provide a safe figure from which to work from.

# Key Results - Internet estimates for online information viewers

Top line results from the online survey applied to the total number of unique website visitors who are likely to have been exposed to the same marketing information show that:-

A total of 468 holidays were **taken or booked** and influenced by the marketing (equating to 4,048 visitor nights).

With a total value of £234,109.

Equating to a value of £501 per holiday.

A further 6 holidays were **extended** due to the influence of the marketing (equating to 11 visitor nights).

With a total value of £656.

Equating to an added value of £108 per holiday extended.

A total of 1,254 group day visits were **taken** and influenced by the marketing (equating to 3,499 individual day visits).

With a total value of £108,130.

Equating to a value of £86 per group day visit.

**Resulting in a value of £342,895 which is attributable to internet visits accessing the same marketing information.**

## Key Results – Overview

The results for those receiving 2015 visitor information and those likely to have viewed similar information through the Wye Valley and Forest of Dean website are summarised in the table below. The figures shown are the results before non-response bias adjustment has taken place.

|  | <b>Information Requesters</b> | <b>Viewing Information Online</b> | <b>Total</b>      |
|--|-------------------------------|-----------------------------------|-------------------|
| Number of influenced holidays                    | 3,498                         | 468                               | <b>3,965</b>      |
| Value of influenced holidays                     | £1,751,074                    | £234,109                          | <b>£1,985,183</b> |
| Value per influenced holiday                     | £501                          | £501                              | <b>£501</b>       |
| Number of extended holidays                      | 45                            | 6                                 | <b>51</b>         |
| Added value of extended holidays                 | £4,905                        | £656                              | <b>£5,561</b>     |
| Added value per extended holiday                 | £108                          | £108                              | <b>£108</b>       |
| Number of influenced group day visits            | 9,382                         | 1,254                             | <b>10,636</b>     |
| Value of influenced group day visits             | £808,784                      | £108,130                          | <b>£916,914</b>   |
| Value per influenced group day visit             | £86                           | £86                               | <b>£86</b>        |
| <b>Total value of influenced holidays/visits</b> | <b>£2,564,762</b>             | <b>£342,895</b>                   | <b>£2,907,658</b> |

# Non-Response Bias

The methodology used in this report follows the evaluation guidelines from VisitBritain. As from 2006/07 it was agreed with DCMS that an adjustment would be made to all evaluation results to take account of non-response bias as identified by Luton University in its Non-Response Report commissioned by VisitBritain.

Professor Brian Mathews of Luton University was commissioned by England Research to investigate a suitable non-response factor and to investigate the effects of certain proposed changes agreed with the National Audit Office and DCMS. He conducted an analysis of a range of representative evaluations and produced a figure of -23% for non-response bias to be used to reduce domestic incremental spend.

Ideally, each evaluation carried out would have its own separate piece of research undertaken to establish the level of non-response bias to be applied to the evaluation results. However, this is not always practical, or achievable, with restrictions imposed through timescales and budgets. With this in mind it was agreed to use the VisitBritain non-response bias figure of – 23% for the Wye Valley and Forest of Dean evaluation on this occasion.

The following slides show the key results in terms of revenue generated and return on investment adjusted to take non-response bias into account.

## Final Key Results – Those receiving of viewing information

The non-response bias adjusted results for those receiving 2015 visitor information or viewing similar information online are summarised in the following table.

|   | <b>Total</b>      |
|---|-------------------|
| Value of influenced holidays/day visits     | £2,234,615        |
| Added value of extended influenced holidays | £4,282            |
| <b>Total influenced value</b>               | <b>£2,238,896</b> |

## Key Results - The wider value of [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk)

As previously stated, the Wye Valley and Forest of Dean website [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk) was a key element of the 2015 Campaign with all aspects of the marketing containing details of the website address. Whilst the previous pages estimate the value of those who received or were exposed to the same visitor information large numbers of potential visitors would have undoubtedly just visited the website and used it to source other information for their visit. It is likely that some were influenced to visit by the information they were exposed to on [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk).

Again, there are no means of reaching this group of people to ascertain their trip taking so to produce an estimate of the value of unique visits to the website a number of assumptions have been made to reduce the total figure of unique visits to what is assumed to be a safe base. Ratios from the current marketing evaluation have been applied to estimate the total value of their visits to the site.

The assumptions made and the outputs produced are shown overleaf and on the following pages although figures should be treated as no more than estimates and are likely to underestimate the true value of the Wye Valley and Forest of Dean site and provide a safe figure to work from.

# Key Results - Other unique visits – Calculations and assumptions

**Other internet estimates based upon;**

Total unique visits to site in campaign period – **414,237**

**Less**

Bounce rate of 44% (single page views no interaction with page) – **140,841**

Total downloads of online brochure (unique user estimate) – **3,184**

Total information requesters that had visited website - **28,735**

**Total remaining = 241,477**

**Of which;**

Estimated visits to site of more than 3 minutes duration (28% - assumed minimum sufficient dwell time to source information).

**Total remaining = 67,614**

**Survey findings applied to one in four (25%) of these unique visits assumed to have acted in line with survey sample;  
16,903 website visitors**

## Key Results - Other internet estimates

Top line results from the online survey applied to the total number of unique website visitors estimate that:-

A total of 2,152 holidays were **taken or booked** and influenced by the website information (equating to 18,628 visitor nights).

With a total value of £1,077,251.

Equating to a value of £501 per holiday.

A further 28 holidays were **extended** due to the influence of the website information (equating to 52 visitor nights).

With a total value of £3,017.

Equating to an added value of £108 per holiday extended.

A total of 5,772 group day visits were **taken** and influenced by the website information (equating to 16,102 individual day visits).

With a total value of £497,560.

Equating to a value of £86 per group day visit.

**Resulting in an estimated value of £1,577,828 which is attributable to other internet visits to the Wye Valley and Forest of Dean website during the campaign period.**

## Key Results - The wider value of printed marketing literature

As previously stated, the actual distribution of brochures was far greater overall than just those directly requesting brochures or viewing them online and as a result further estimates have also been made to include the bulk distribution of printed material to understand the true value of the printed information. The total number of guides distributed outside of the Wye Valley and Forest of Dean area was approximately 55,000 (26,000 Visitor Guide, 23,000 Attractions and Activities Guide and 6,000 Eating Out Guide).

Again, there are no means of reaching this group of people that had not directly requested a brochure to ascertain their trip taking so to produce an estimate of the likely value a number of assumptions have been made to reduce the total figure of numbers receiving marketing literature to what is assumed to be a safe base. Ratios from the current marketing evaluation have been applied to estimate the total value of their visits to the site.

The assumptions made and the outputs produced are shown overleaf and on the following pages although figures should be treated as no more than estimates and are likely to underestimate the true value of the bulk distribution of brochures and provide a safe figure from which to work from.

# Key Results – Bulk guide distribution – Calculations and assumptions

**Bulk guide distribution estimates based upon;**

Total brochures distributed in campaign period; **55,036**

50% of which are assumed to have been viewed.

**Total guides viewed = 27,518**

**Unique viewer estimate = 9,360 (Based upon survey data showing the numbers of guides viewed by an individual)**

**Survey findings applied to one in four (25%) of those viewing guides assumed to have acted in line with survey sample; 2,340 guide viewers.**

# Key Results – Bulk guide distribution estimates

Top line results from the online survey applied to the total number of those viewing guides through their bulk distribution estimate that:-

A total of 366 holidays were **taken or booked** and influenced by the marketing (equating to 3,167 visitor nights).

With a total value of £183,130.

Equating to a value of £501 per holiday.

A further 5 holidays were **extended** due to the influence of the marketing (equating to 9 visitor nights).

With a total value of £518.

Equating to an added value of £108 per holiday extended.

A total of 984 group day visits were **taken** and influenced by the marketing (equating to 2,664 individual day visits).

With a total value of £82,312.

Equating to a value of £84 per group day visit.

**Resulting in an estimated value of £265,960 which is attributable to the bulk distribution of guides during the campaign period.**

## Key Results – Combined Overview

The combined results for those requesting information, or viewing it online, along with estimates for other unique visitors to the Wye Valley and Forest of Dean website and the bulk distribution of guides are summarised in the table below. The figures shown are the results before non-response bias adjustment has taken place.

|   | <b>Information Requesters/<br/>Online Viewers</b> | <b>Other Internet Unique Visits<br/>Estimates</b> | <b>Bulk Guide Distribution<br/>Estimates</b> | <b>Total</b>      |
|---|---|---|--|-------------------|
| Number of influenced holidays             | 3,965   | 2,152   | 366  | <b>6,483</b>      |
| Value of influenced holidays              | £1,985,183  | £1,077,251  | £183,130                                     | <b>£3,245,564</b> |
| Value per influenced holiday              | £501  | £501  | £501   | <b>£501</b>       |
| Number of extended holidays               | 51  | 28  | 5  | <b>84</b>         |
| Added value of extended holidays          | £5,561  | £3,017  | £518   | <b>£9,096</b>     |
| Added value per extended holiday          | £108  | £108  | £108   | <b>£108</b>       |
| Number of influenced group day visits     | 10,636  | 5,772   | 984  | <b>17,392</b>     |
| Value of influenced group day visits      | £916,914  | £497,560  | £82,312                                      | <b>£1,496,786</b> |
| Value per influenced group day visit      | £86   | £86   | £84  | <b>£84</b>        |
| Total value of influenced holidays/visits | £2,907,658  | £1,577,828  | £204,789                                     | <b>£4,690,275</b> |

## Final Key Results – Combined Overview

The final estimates, adjusted to allow for non-response bias, for those requesting information, or viewing it online, along with estimates for other unique visitors to the Wye Valley and Forest of Dean website and the bulk distribution of guides are summarised in the following table.

|   | <b>Information Requesters/<br/>Online Viewers</b> | <b>Other Internet Unique Visits<br/>Estimates</b> | <b>Bulk Guide Distribution<br/>Estimates</b> | <b>Total</b>      |
|---|---|---|--|-------------------|
| Value of influenced holidays/day visits     | £2,234,615  | £1,212,604  | £204,390                                     | <b>£3,651,609</b> |
| Added value of extended influenced holidays | £4,282  | £2,323  | £399   | <b>£7,004</b>     |
| Total influenced value                      | £2,238,896  | £1,214,928  | £204,789                                     | <b>£3,658,613</b> |

An estimated £3.7 million pounds was influenced through the Wye Valley and Forest of Dean 2015 marketing activity. Using the widely used and accepted national estimate of £50,000 visitor expenditure being required to generate a full time equivalent (FTE) job equates to 73 FTE's supported by the marketing activity.

## Return on Investment – Combined Overview

The figures in the table below, adjusted to allow for non-response bias, show the financial return achieved for those requesting information, or viewing it online, along with other unique visitors to the Wye Valley and Forest of Dean website and the bulk distribution of guides in relation to the monies invested.

|   | <b>Information Requesters/<br/>Online Viewers</b> | <b>Other Internet Unique Visits<br/>Estimates</b> | <b>Bulk Guide Distribution<br/>Estimates</b> | <b>Combined</b> |
|---|---|---|--|-----------------|
| Marketing spend                                   | £77,000   | £7,000  | Included in information requesters total     | <b>£84,000</b>  |
| Value per £ holiday/day visit influenced          | £29.02  | £173.23   | £2.65  | <b>£43.47</b>   |
| Value per £ extended holiday influenced           | £0.06   | £0.33   | £0.01  | <b>£0.08</b>    |
| Combined value per £ spent (Return on investment) | £29.08  | £173.56   | £2.66  | <b>£43.55</b>   |

'Value per £' shows how much money was generated for each marketing pound spent.

The table shows that Wye Valley and Forest of Dean 2015 marketing activity overall generated an estimated £43.55 for each marketing pound spent.

## E-newsletters, the Wye Valley and Forest of Dean website and visitor guides were the most recalled sources of visitor information

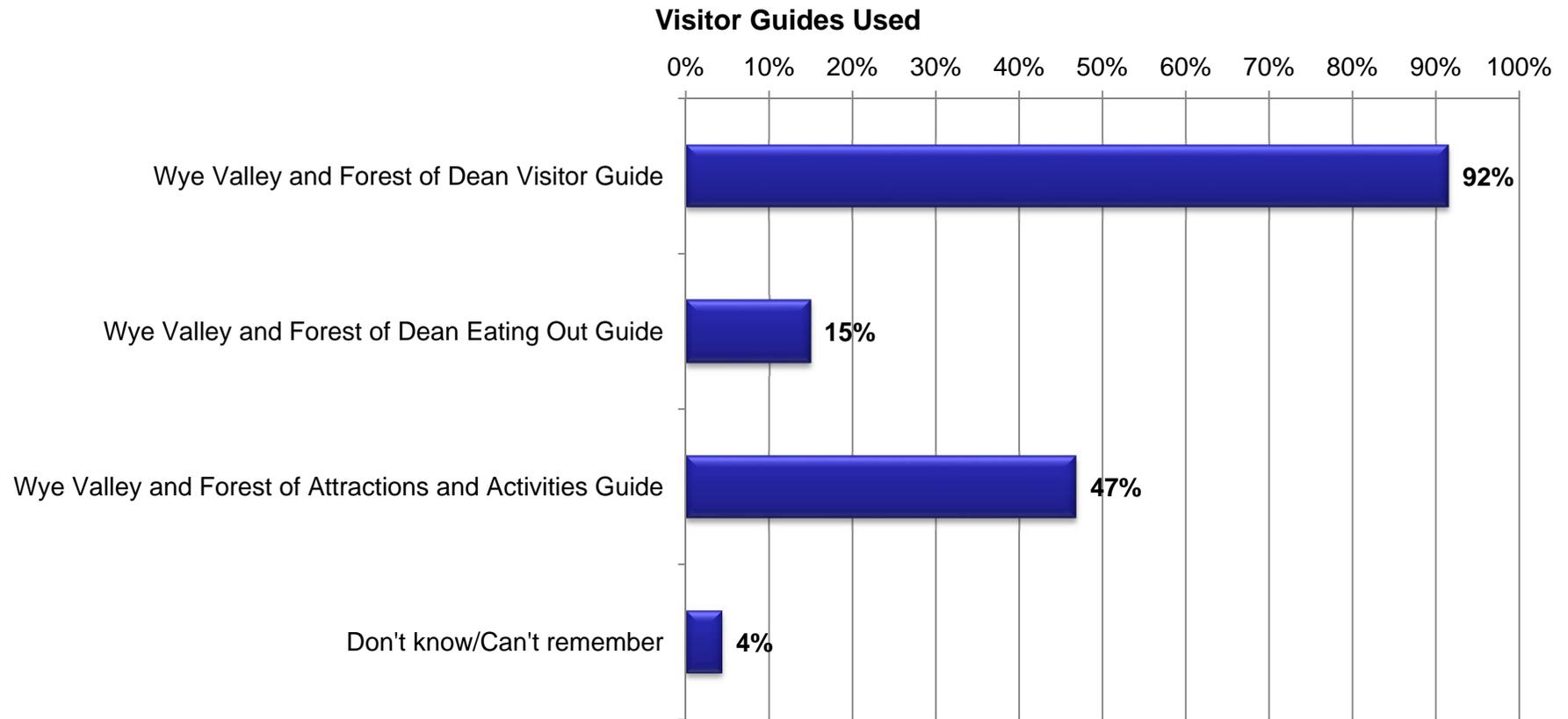
| Recall of source relating to visitor information |     |  |    |
|--|-----|--|----|
| Through an e-newsletter                          | 55% | Newspaper advertisement                    | 5% |
| Through the www.wyedeantourism.co.uk website     | 49% | Wye Valley and Forest of Dean Twitter feed | 3% |
| Through a visitor guide                          | 37% | Saw it on TV                               | 3% |
| Online advertising                               | 14% | Don't know/can't recall                    | 3% |
| Through a tourist information centre             | 14% | Through another website                    | 2% |
| Wye Valley and Forest of Dean Facebook page      | 10% | Poster advertising                         | 2% |
| Other  | 6%  | Heard a radio advertisement                | 1% |
| Word of mouth                                    | 5%  |  |    |

55% of all respondents recalled sourcing information through an e-newsletter, 49% through the Wye Valley and Forest of Dean website and 37% recalled sourcing information through a visitor guide.

Online advertising and through a tourist information centre were the next most recalled sources of visitor information (14% in each case).

In terms of social media the Wye Valley and Forest of Dean Facebook page was recalled by 10% of respondents and the Twitter feed by 3%.

# The Wye Valley and Forest of Dean Visitor Guide was used by the large majority of those using a visitor guide



The Wye Valley and Forest of Dean Visitor Guide was used by the large majority of those using a visitor guide (92%) with the Attractions and Activities Guide the next most used (47%). Just 15% of those using a visitor guide had used the Wye Valley and Forest of Dean Eating Out Guide and 4% couldn't remember or didn't know the specific guide that they had used.

# Recall of information

Respondents were initially asked if they recalled receiving the Wye Valley and Forest of Dean 2015 visitor information and where they had sourced it from. All respondents were then shown a series of images related to the Wye Valley and Forest of Deans' 2015 marketing activity. Those that also recalled receiving the information after being prompted by the images were also routed through the questionnaire for details of any visits taken (89% of all respondents).

Recall of individual marketing images is shown below, 24% of respondents failed to recognise any of the images shown.



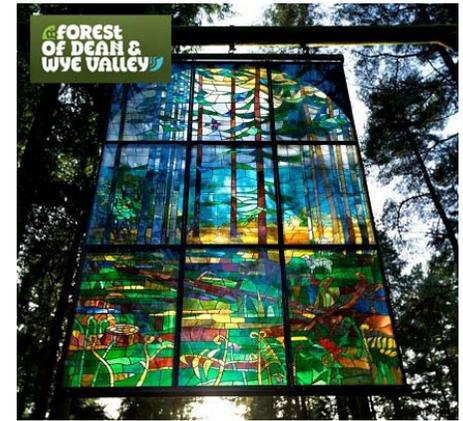
10%



38%



24%



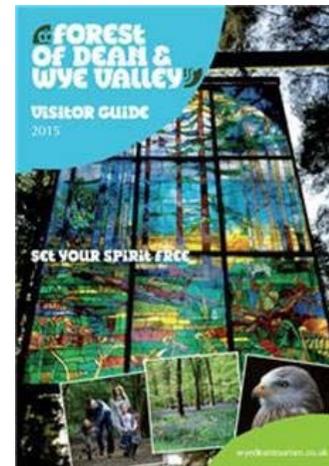
35%



21%



32%



22%

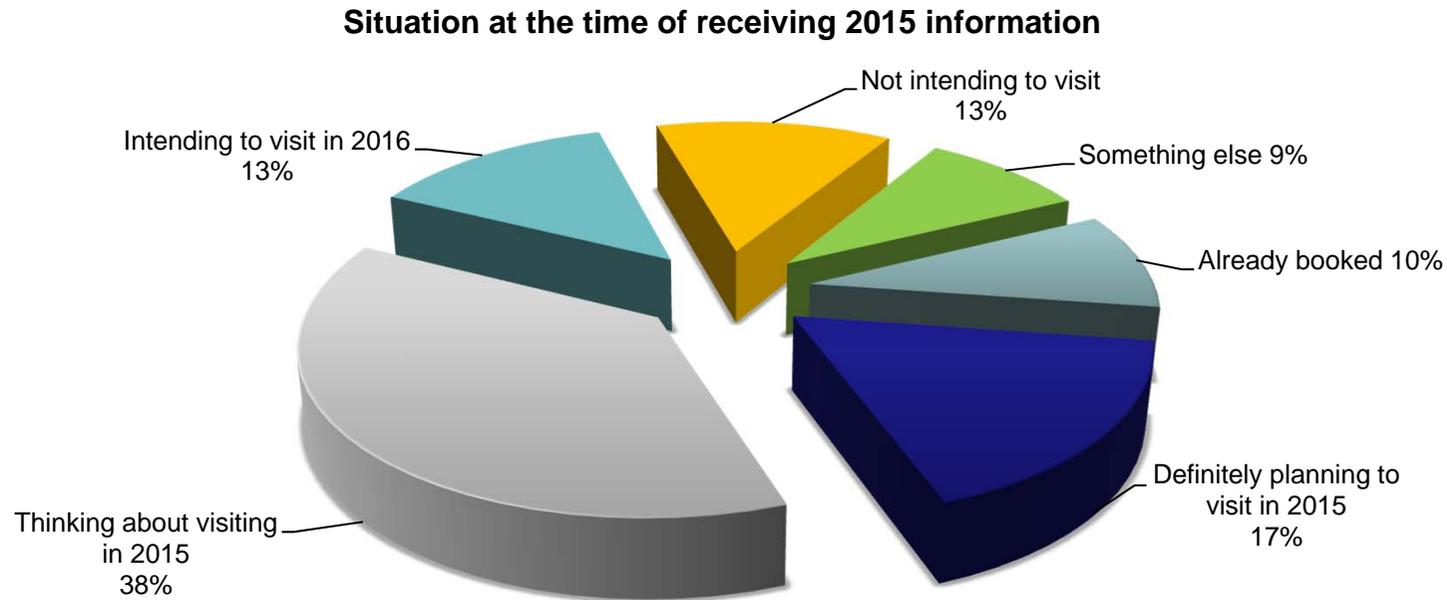


12%



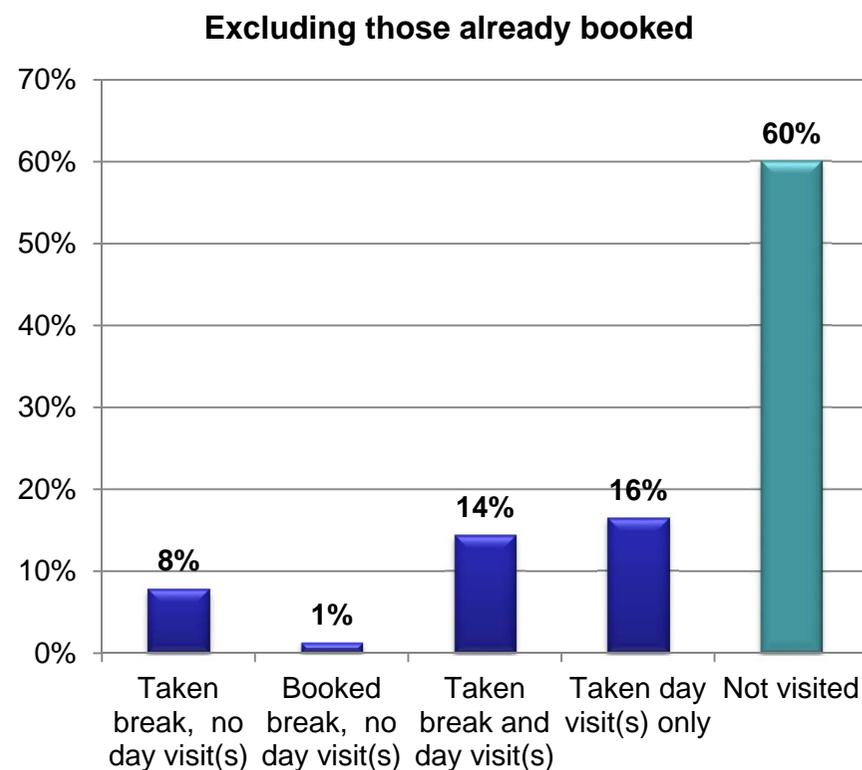
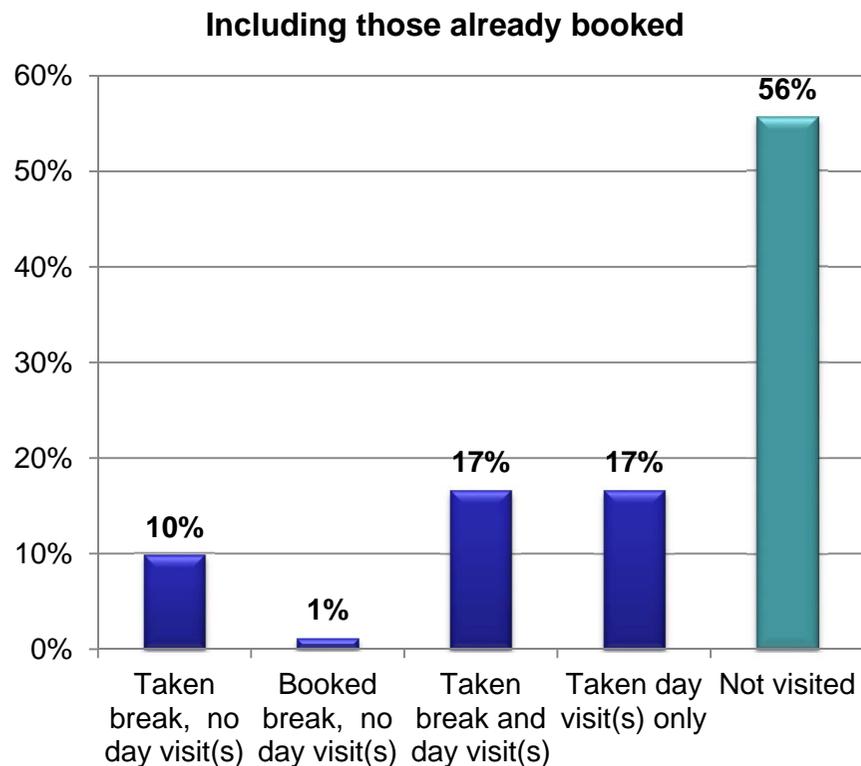
10%

# 10% of respondents had already booked a visit to the Wye Valley and Forest of Dean at the time of receiving the 2015 visitor information.



At the time of receiving the 2015 visitor information 10% of respondents had already booked a visit to the Wye Valley and Forest of Dean. A further 17% were definitely planning to visit in 2015, 38% were thinking of visiting in 2015 and 13% were intending to visit in 2016.

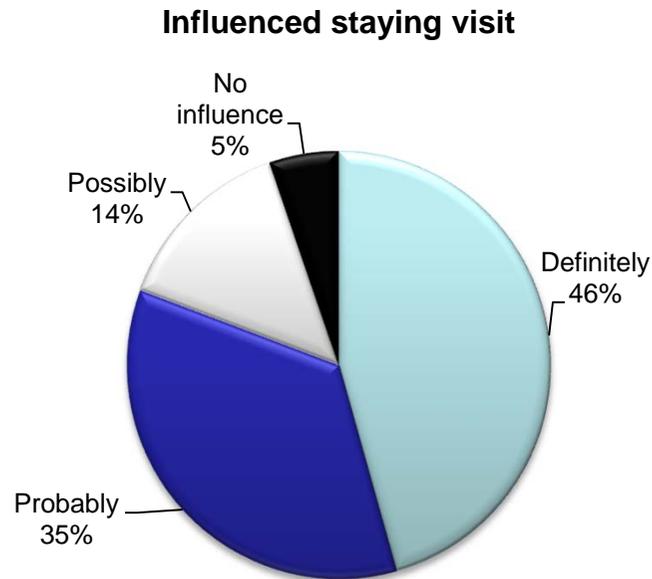
## 45% of respondents had either taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean at the time of the survey



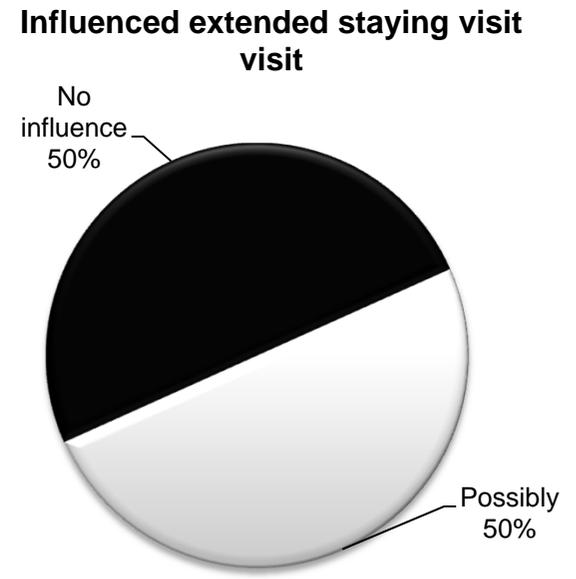
Analysis of all respondents shows that 45% had taken or booked a holiday or taken a day visit at the time of interview. However, when those that had already booked a holiday in the Wye Valley and Forest of Dean prior to exposure to the 2015 visitor information were excluded from the analysis the proportion reduces to 39% of the remaining respondents who had taken or booked a holiday or taken a day visit to the area.

**The visitor figures given in the remainder of this report refers to only those that had not booked prior to receiving or sourcing any information unless otherwise specified.**

# 95% of those taking holidays stated that the 2015 visitor information or any subsequent visits to the Wye Valley and Forest of Dean website had a degree of influence in their decision to visit the area



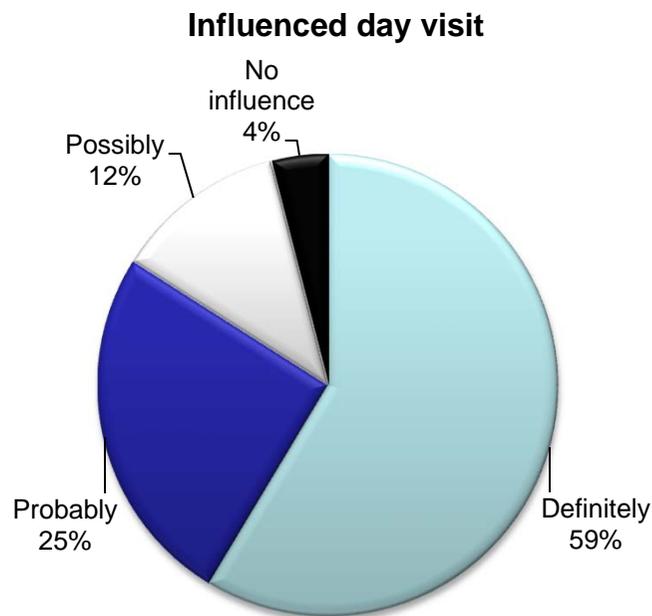
Respondents who had taken or booked a break in the Wye Valley and Forest of Dean were asked if the 2015 visitor information or the website had turned a possible visit into a certainty with the possible responses being 'definitely', 'probably', 'possibly', 'not at all' or 'don't know'.



Of those not influenced to visit the Wye Valley and Forest of Dean by the 2015 visitor information, 50% were influenced to extend their visit to the area.

Levels of influence were defined in two stages. Firstly, all respondents that had taken or booked a holiday were asked about the influence of the 2015 visitor information. Respondents not influenced by the information that had subsequently used the Wye Valley and Forest of Dean website were asked about the influence of the information on the site. All respondents that were definitely, probably or possibly influenced by either communication method have been included as influenced visitors.

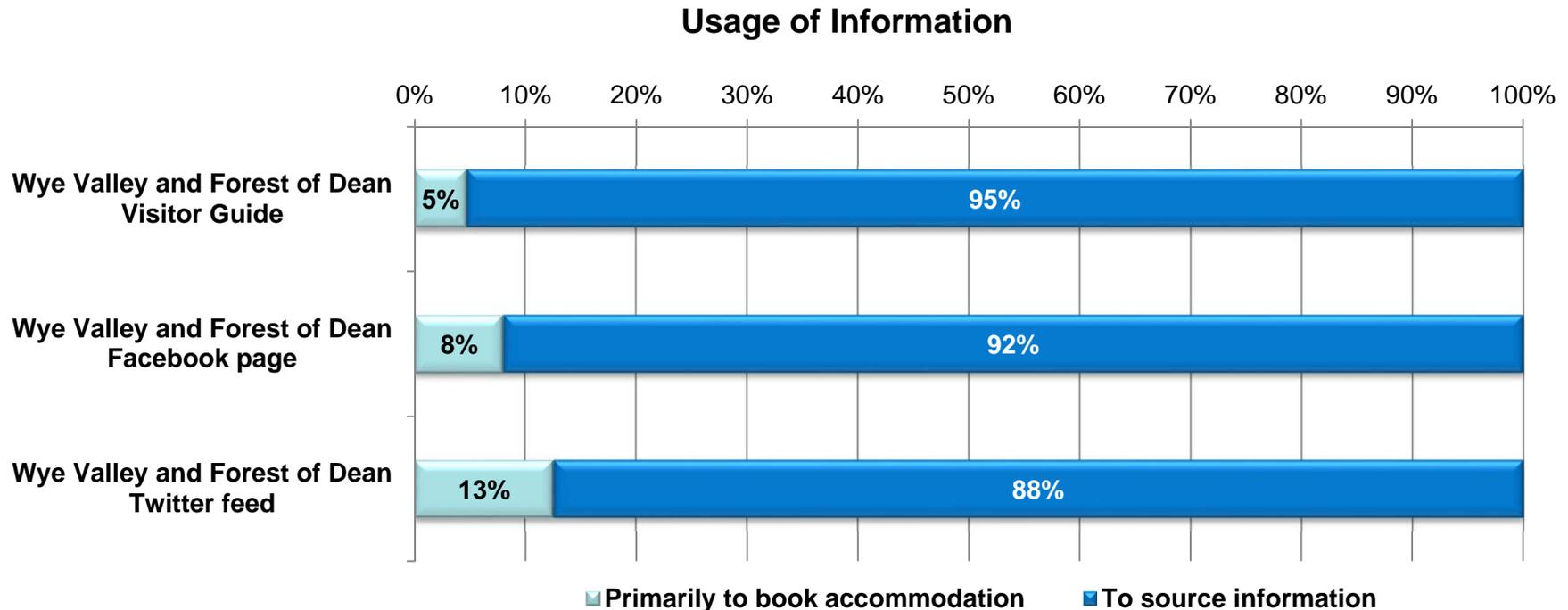
## 96% of those taking day visits stated that the 2015 visitor information or any subsequent visits to the Wye Valley and Forest of Dean website had a degree of influence in their decision to visit the area



Respondents who had taken a day visit in the Wye Valley and Forest of Dean were asked if the 2015 visitor information or the website had turned a possible visit into a certainty with the possible responses being 'definitely', 'probably', 'possibly', 'not at all' or 'don't know'.

In a similar manner to respondents that had taken or booked a holiday, those taking day visits were asked about the degree of influence of the information that they had received and/or seen on the website. Firstly, all respondents that had taken a day visit were asked about the influence of the 2015 visitor information. Respondents not influenced by the information that had subsequently used the Wye Valley and Forest of Dean website were asked about the influence of the information on the site. All respondents that were definitely, probably or possibly influenced by either communication method have been included as influenced visitors.

# The primary usage amongst all visitors using the Visitor Guide and social media was to source information

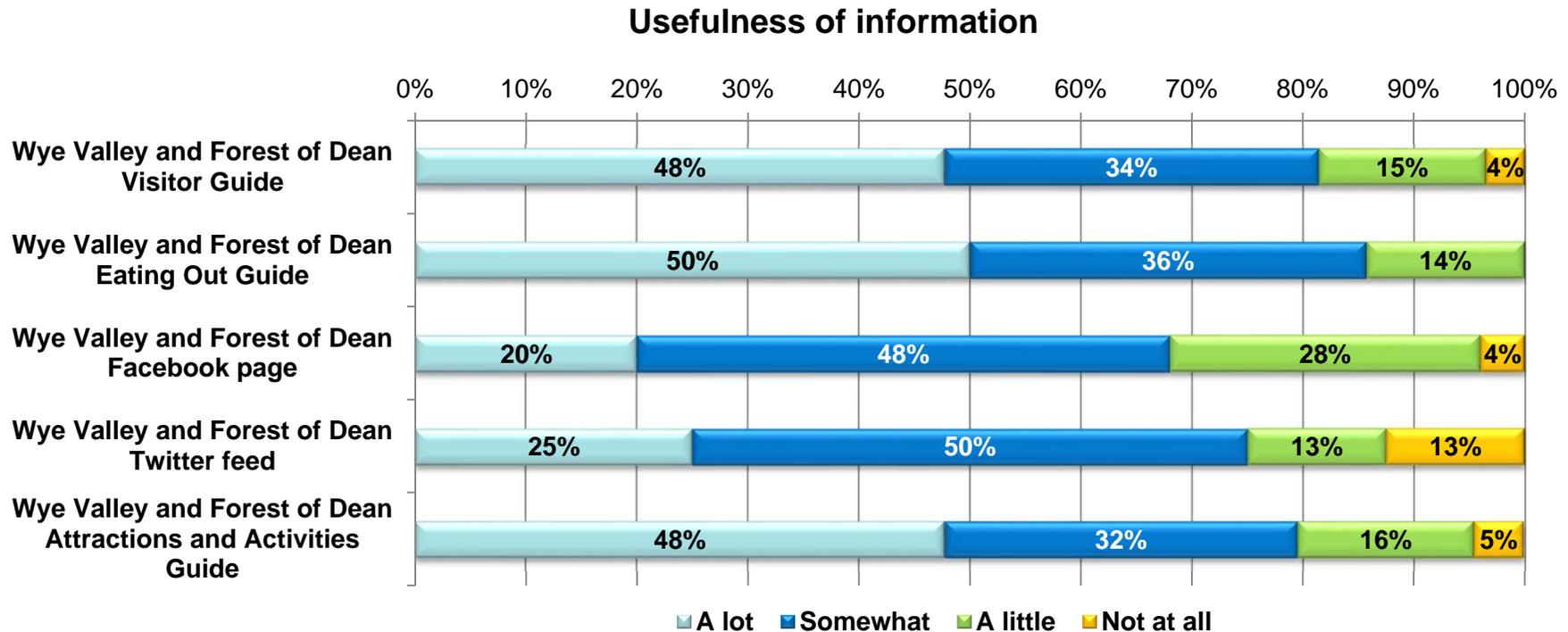


For 13% of visitors using the Twitter feed, 8% using Facebook and 5% using the Visitor Guide the primary usage was to book accommodation although the majority of visitors across all information sources used them to find out more information about visiting the Wye Valley and Forest of Dean. However, the relatively small sample sizes of social media users should be considered when interpreting this data.

The value of all staying visitor holidays to the Wye Valley and Forest of Dean was in excess of £8.8m, of which an estimated £3m would have been spent on accommodation bookings. The 5% of respondents using the guide primarily to book accommodation would equate to approximately £151,000 of accommodation bookings spread amongst those businesses featured in the guide. This is a minimum value of accommodation bookings as others for whom booking accommodation wasn't the primary usage of the guide are also likely to have booked with featured accommodation providers.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean regardless of whether they had already booked their trip at the time they received the information.*

# Across all information sources, the majority of respondents in each case indicated that they had helped them 'a lot' or 'somewhat' in planning their visit

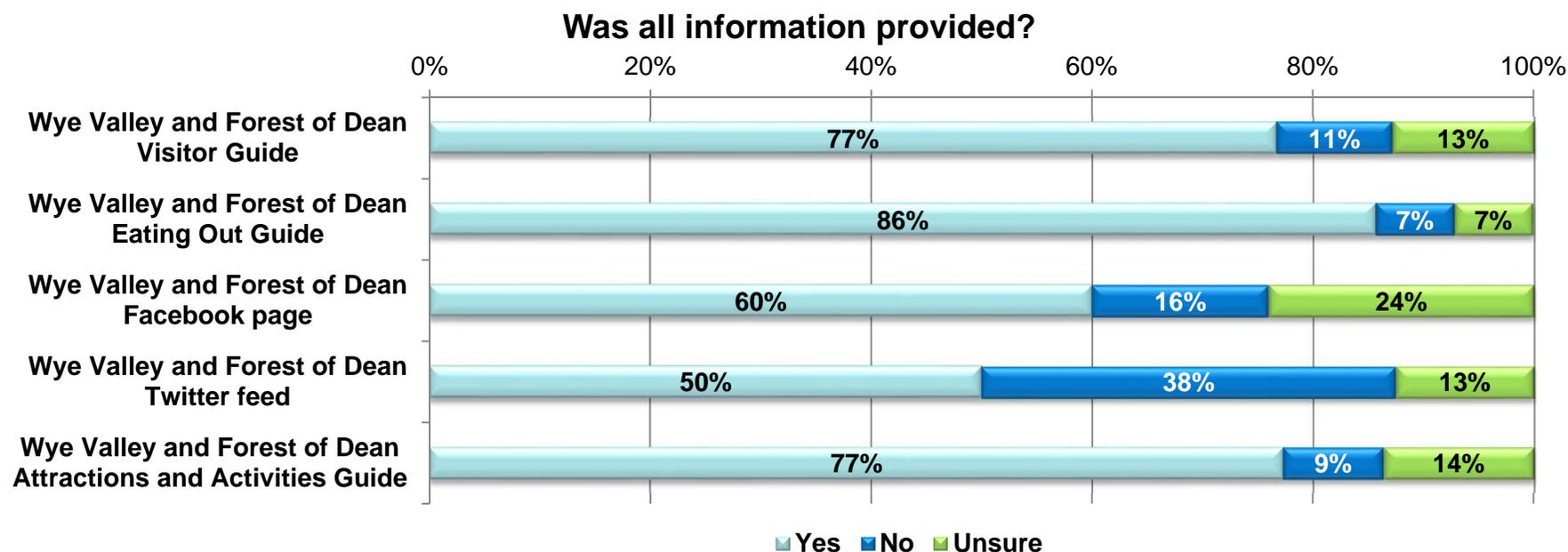


Respondents were asked how much each of the various information sources had helped them in planning their visit to the area. Across all the information sources, the majority of respondents in each case indicated that they had helped them a lot or somewhat. With the exception of the Eating Out Guide, relatively small proportions of between 4% and 13% stated that the information sources had not helped them at all.

Whilst the small sample sizes for social media sources should be considered, noticeably smaller proportions of users stated that the Facebook page and Twitter feed had helped them a lot (20% and 25% respectively) compared to the proportions stating the same about the guides. This could just be related to the fact that social media is not designed or intended to provide the same level of detail as printed literature but may also offer an insight to areas that could be improved.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean regardless of whether they had already booked their trip at the time they received the information.*

## The majority of respondents across nearly all of the information sources felt they each provided all of the information that they were looking for



The majority of respondents using the Wye Valley and Forest of Dean guides and Facebook page felt they each provided all of the information that they were looking for including 88% using the Eating Out Guide and 77% in each case using the Visitor Guide and Attractions and Activities Guide. Half of all respondents using the Twitter feed felt it provided all of the information they wanted.

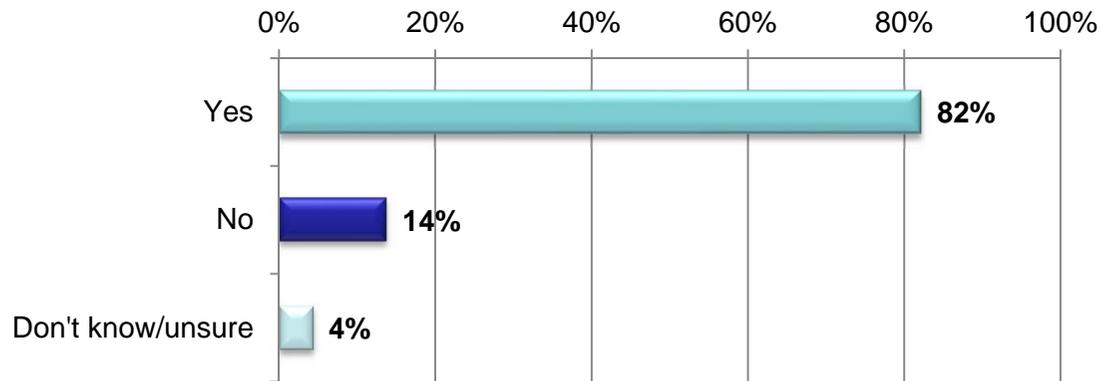
However, and again noting small sample sizes, 38% of visitors using the Twitter feed and 16% using the Facebook page stated that they didn't provide all that they were looking for although the nature of these information sources means that they are never likely to provide a comprehensive information resource but primarily signpost potential consumers to more detailed information sources.

Areas that it was felt more information could have been provided for across all information sources included more accommodation information (particularly smaller operators and campsites), more events information and maps, walking routes, free days and car free days out.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean regardless of whether they had already booked their trip at the time they received the information.*

# 82% of all visitors had visited the Wye Valley and Forest of Dean website

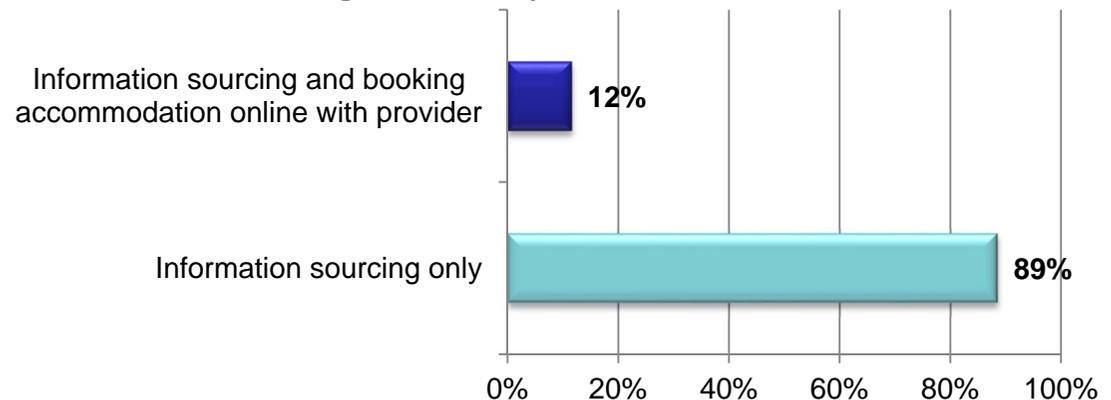
Visits to [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk)



Approximately four fifths of all visitors (82%) had visited the Wye Valley and Forest of Dean website.

Usage of [www.wyedeantourism.co.uk](http://www.wyedeantourism.co.uk)

The large majority of those using the website had done so to source information for their visit only (89%). 12% used the site to book accommodation online.



*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean regardless of whether they had already booked their trip at the time they received the information.*

## Holiday/day visit statistics

| <b>Influenced holiday statistics</b>              |      |
|---|------|
| Average holidays taken/booked                     | 1.76 |
| Average number of nights per holiday taken/booked | 3.69 |
| Average number of people per holiday taken/booked | 2.58 |

An average of 1.76 holidays were taken or booked in the Wye Valley and Forest of Dean amongst visitors influenced by the information they had received. The average number of nights for all influenced holidays was 3.69 with the average number of people being 2.58.

Coleford (17%), Cinderford (14%), Ross on Wye (12%), Chepstow (7%), Lydney (7%), Monmouth (7%) and Symonds Yat (5%) were the most popular locations of stay amongst visitors.

| <b>Influenced day visit statistics</b> |      |
|--|------|
| Average number of days visits          | 3.23 |
| Average number of people               | 2.76 |
| Average duration (hours:minutes)       | 5:25 |

An average of 3.23 day visits were taken amongst those visitors influenced by the information with an average of 2.76 persons per visit for an average duration of five hours and twenty five minutes.

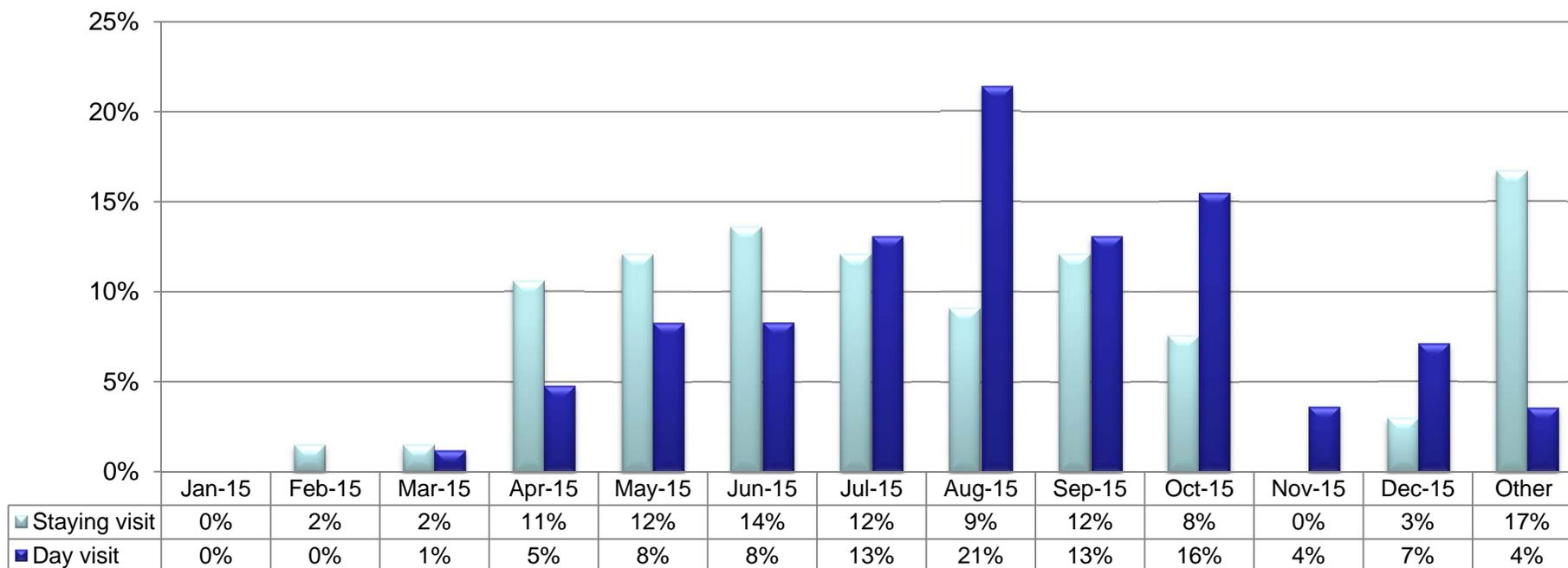
Coleford (45%), Chepstow (12%), Lydney (12%), Cinderford (10%), Monmouth (10%), Symonds Yat (10%) and Tintern (10%) were the most popular locations for day visitors.

The majority of day visitors did not mention specific reasons for their visit, rather just for a leisure day out. Other specifics mentioned included walking, scenery/countryside, cycling and a number of built visitor attractions.

*Please note that these results exclude respondents who had already taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean at the time they received the information.*

# Month of holiday taken/booked and day visits for all visitors

Month of most recent trip



41% of all staying visits were taken before the peak period of July/August when a further 21% were taken. 23% of staying visits were taken between September to December with the remaining 17% booked for months after 2015. This suggests that the 2015 marketing was successful in stimulating holidays in the shoulder season when they are probably most needed by the local industry.

22% of day visits were taken before the July/August peak period, 34% were taken during the peak period with a further 40% taken between September and December. 4% of day visits were planned/booked for months after 2015. This again demonstrates that good levels of trips outside of the period were stimulated by the 2015 marketing.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean regardless of whether they had already booked their trip at the time they received the information.*

## 33% of all visitors chose serviced accommodation for their holiday

| Accommodation used             | %   |
|--------------------------------|-----|
| B&B/Guest house                | 24% |
| Self-catering holiday home     | 23% |
| Holiday centre/park/camp       | 12% |
| Hotel                          | 9%  |
| Camping                        | 9%  |
| Staying with friends/relatives | 9%  |
| Touring caravan                | 7%  |
| Other                          | 3%  |
| Static caravan - owned/rented  | 1%  |
| Youth hostel                   | 1%  |
| Second home                    | 0%  |

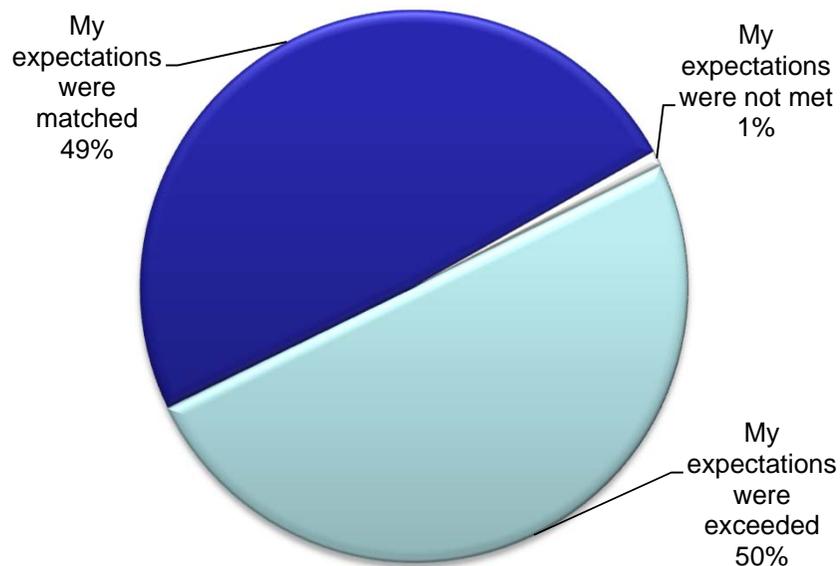
33% of visitors chose serviced accommodation for their visit (9% Hotel and 24% B&B/Guest House), with Self-catering (23%), Camping/Touring caravan (16%) and Holiday centre/park/camp (12%) being the next most popular choices.

More than a third of staying visitors (35%) booked holidays with accommodation providers featured in the 2015 Wye Valley and Forest of Dean Visitor Guide. In terms of value this would equate to approximately £1m of accommodation spend being spread amongst those accommodation businesses featured in the guide, clearly demonstrating the value of participation top businesses.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the Wye Valley and Forest of Dean regardless of whether they had already booked their trip at the time they received the information.*

## 50% of all staying and day visitors combined stated that their expectations were exceeded during their visit

How did visit match expectations



49% of visitors stated that their visit to the Wye Valley and Forest of Dean matched their expectations but, more importantly, half of all visitors said that their expectations exceeded – an important driver for business growth through repeat visits and word of mouth recommendation. Just 1% of visitors stated that their expectations were not met.

*Please note that these results include all respondents who had already taken a holiday or day visit in the Wye Valley and Forest of Dean at the time of completing the survey.*

# Likelihood of Recommending the Wye Valley and Forest of Dean

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

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

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

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

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

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

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

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

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

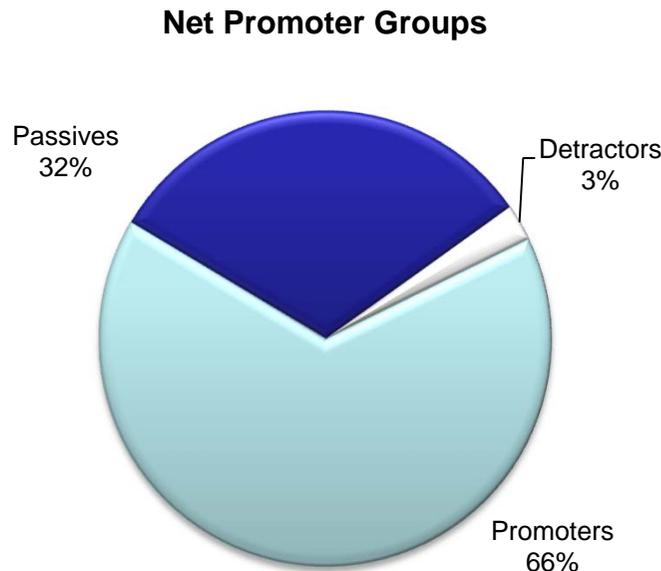
# Likelihood of Recommending the Wye Valley and Forest of Dean

Visitors were asked “On a scale of ‘0’ to ‘10’ where ‘0’ is ‘extremely unlikely’ and ‘10’ is ‘extremely likely’, how likely would you be to recommend a visit to the Wye Valley and Forest of Dean to your friends or family?” Using the results from this question a Recommendation Score (as described on the previous slide) has been calculated.

The Wye Valley and Forest of Dean achieved a recommendation score of +63% for all visitors, +67% for staying visitors and +63% for day visitors.

For all visitors, 66% of visitors were categorised as ‘Promoters’ giving a score of 9 or 10 out of 10 for their likelihood of recommending the area to their friends or family, 32% gave a score of 7 or 8 and were categorised as ‘Passives’, whilst just 3% gave a score of 0-6 for their likelihood of recommending the market and were therefore categorised as ‘Detractors’.

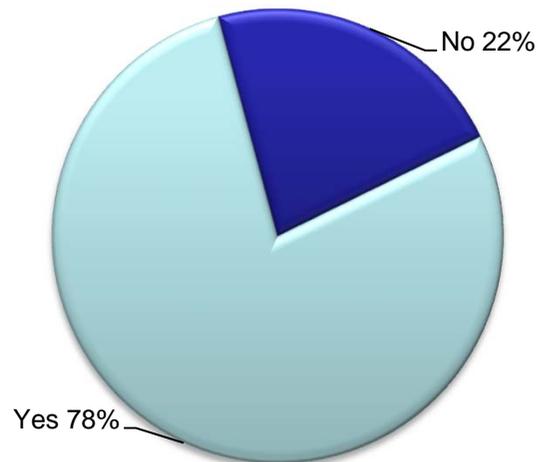
This is a good score for the Wye Valley and Forest of Dean on a metric that can range from -100% to +100%, and thus demonstrates the strength of tourism product on offer.



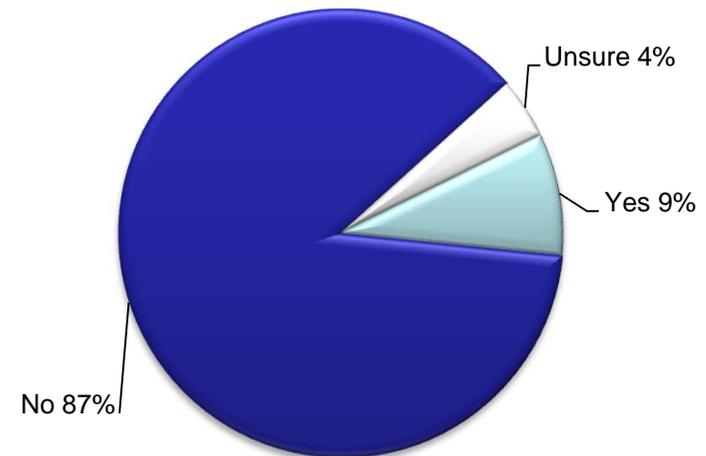
| Net Promoter Scores | %    |
|---------------------|------|
| All visitors        | +63% |
| Staying visitors    | +67% |
| Day visitors        | +63% |

## 78% of non-visitors had taken a holiday elsewhere in 2015

**Taken a holiday elsewhere in 2015**



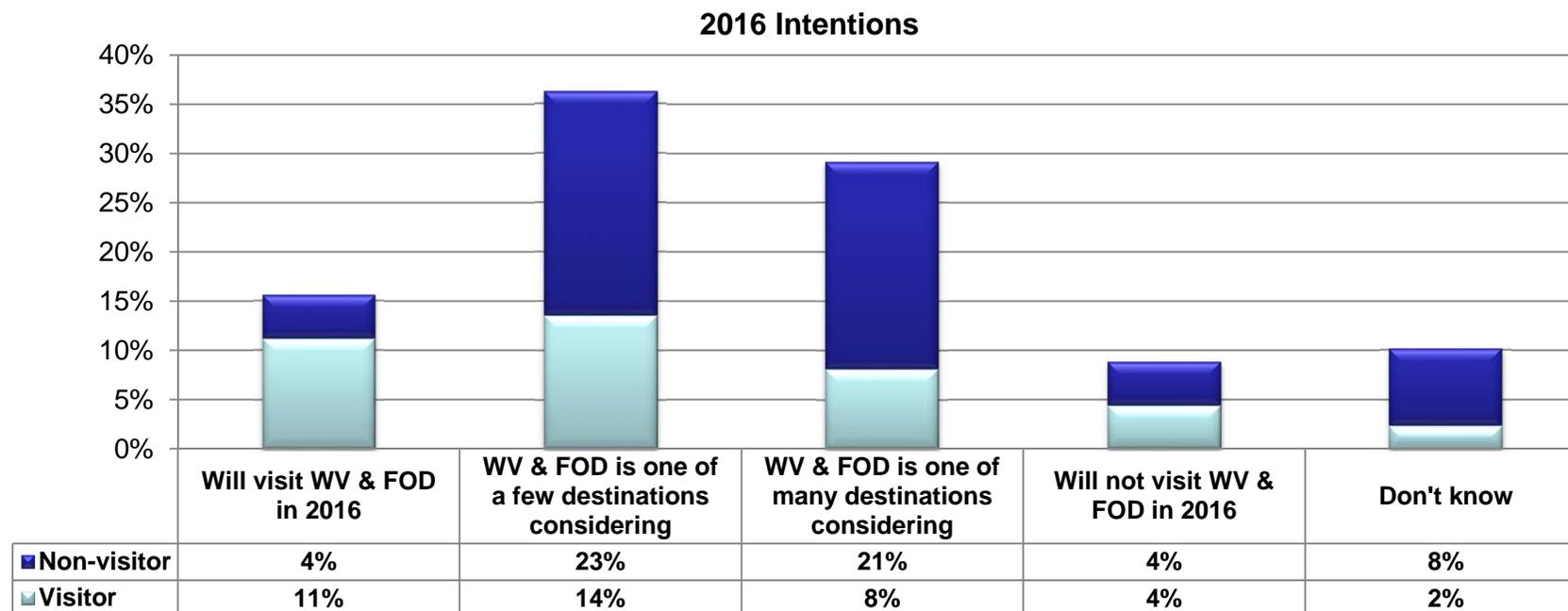
**Destination chosen in preference to Wye Valley and Forest of Dean**



Whilst 78% of non-visitors had taken a holiday elsewhere in 2015 just 9% of these had chosen their destination in direct preference to a holiday in the Wye Valley and Forest of Dean.

Other destinations that were chosen in preference to the Wye Valley and Forest of Dean included overseas destinations, Devon, Cornwall and Yorkshire although the small proportion holidaying elsewhere in preference suggests that the area has few direct competitors amongst those with an interest in the holidaying there.

## Just 8% of all respondents have ruled out visiting the Wye Valley and Forest of Dean in 2016



15% of respondents have already decided to visit the Wye Valley and Forest of Dean in 2016 with 72% of these being repeat visitors from 2015. Whilst only 8% of all respondents have ruled out the Wye Valley and Forest of Dean as a destination to visit in 2016 there is clearly some work to be done to convert possible visits into actual visits in the year ahead with 37% considering the area as one of a few destinations to visit and 29% considering it along with many other destinations.

However, it is also clear that the large majority of non-visitors in 2015 are still open to the idea of visiting in the future, suggesting that there are no major problems with the product offering that they have seen. Indeed, exposure to marketing literature in 2015 could well have an influence on current non-visitors going on to visit the Wye Valley and Forest of Dean in the future.

This research does not take into account any future impacts on visits due to the 2015 marketing activity. For example, it is likely that a proportion of influenced new visitors during 2015 will turn into regular repeat visitors giving a much longer term value to the 2015 marketing activity.

*Please note that these results include all respondents who responded to the survey.*

## 96% of all respondents were from the UK



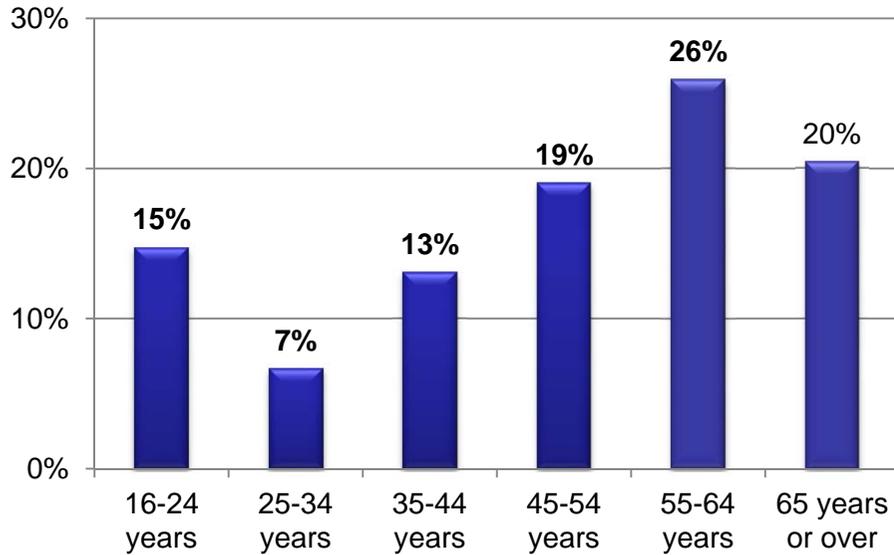
| Region/Country  | All | Visitors | Non-visitors |
|---|-----|----------|--------------|
| South East  | 18% | 13%      | 22%          |
| West Midlands   | 15% | 20%      | 11%          |
| South West (other than Wye Valley and Forest of Dean) | 13% | 19%      | 9%           |
| East Midlands   | 11% | 6%       | 13%          |
| Wales   | 10% | 13%      | 7%           |
| North West  | 10% | 10%      | 9%           |
| London  | 6%  | 0%       | 9%           |
| East of England                                       | 5%  | 6%       | 4%           |
| Wye Valley and Forest of Dean                         | 5%  | 9%       | 2%           |
| Yorkshire and The Humber                              | 5%  | 3%       | 6%           |
| North East  | 2%  | 2%       | 2%           |
| Scotland  | 2%  | 0%       | 6%           |
| Northern Ireland                                      | 0%  | 0%       | 0%           |

96% of all respondents were from the UK and the remaining 4% were from overseas. The table details UK origin by respondent type. The South East (18%), South West (18% - including 5% from the Wye Valley and Forest of Dean) and West Midlands (15%) provided the largest proportions of respondents.

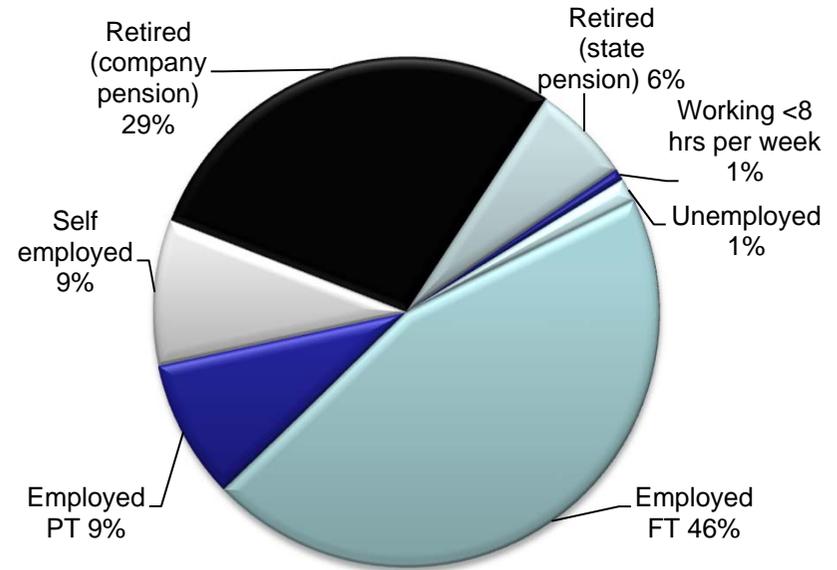
Generally speaking, the largest proportions of visitors are linked to travel distance/ease of reaching the Wye Valley and Forest of Dean as would be expected. Whilst acknowledging for the relatively small sample sizes for each of the areas, the South East would appear to offer potential to increase visitor numbers with a good proportion of visitors already coming from the region but a larger proportion of non-visitors and all of the survey sample collected from London were also non-visitors.

# Respondent profile

**Age of respondent**



**Situation of main wage earner**



39% of all respondents were male and 61% were female. In terms of age, 46% were over 55 years old, 32% were between 35 and 54 years old with the remaining 22% less than 35 years old.

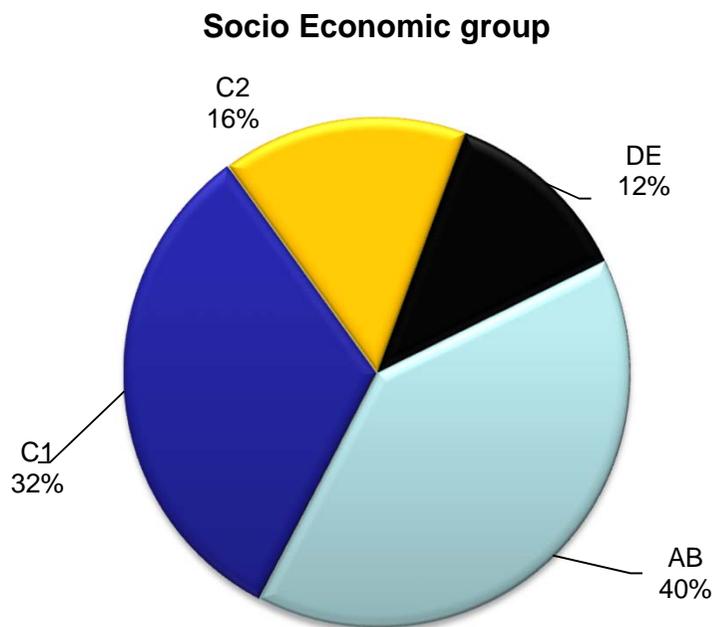
For 46% of respondents the main wage earner in the household was in full time employment, 9% were employed part time and 9% were self employed. 35% of respondents were from retired households with 29% of these being in receipt of a company pension and 6% a state pension.

There were no significant differences between the profile of visitors and non-visitors.

# Socio Economic Group

72% of information requesters were categorised as ABC1's, including 40% as AB's and 32% as C1's, well above the national average for these categories grouped. 16% of information requesters were categorised as C2's and the remaining 12% as DE's.

There was little variation in the results according to visitor type.



## Socio economic classifications

### A - Approximately 3% of the total population.

These are professional people, very senior managers

### B - Approximately 20% of the total population

Middle management executives in large organisations, principal officers in local government, top management or owners of small business concerns.

### C1 - Approximately 28% of the total population.

Junior management, owners of small establishments, and all others in non-manual positions.

### C2 - Approximately 21% of the total population.

All skilled manual workers, and those manual workers with responsibility for other people.

### D - Approximately 18% of the total population.

All semi-skilled and un-skilled manual workers, apprentices and trainees to skilled workers.

### E - Approximately 10% of the total population.

All those entirely dependent on the state long-term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding six months