

Malvern Hills District Council

Visitor Survey 2015/16

Final Report



Prepared for: Malvern Hills District Council

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Executive Summary

The Research Solution was commissioned by Worcestershire & Partners to undertake a major market research appraisal of the visitor profile and views of those visiting the County. This is the report relating to the interviews conducted in the Malvern Hills District. The locations used are shown below.

Interview locations		
British Camp	77	18%
Witley Court	60	14%
Croome Court	58	14%
Tenbury Wells	55	13%
Malvern Theatre/Gardens	45	11%
Upton Town Centre/TIC/Heritage Centre	40	10%
Worcestershire Beacon	40	10%
Great Malvern Town Centre	24	6%
Thrill on the Hill Event	20	5%

Type of Visitor

The majority of visitors were on a day visit (66%). Almost a third (32%) were visitors from other parts of the UK, either staying overnight in Malvern Hills District (22%) or visiting the area as part of a touring holiday. Only 1% of all visitors were from overseas.

Demographic Profile of Visitors

A total of 419 parties of visitors were surveyed. The average (mean) number of people per group was approximately 3.1 giving a total of at least 1,283 people included in the survey sample. Across all markets, the majority of groups interviewed were adult couples and family groups. The domestic touring market (64%) and overnight market (49%) saw higher numbers of adult couples than both day visitors (39%) and overseas visitors (33%). Visitors travelling with friends and family accounted for almost half (49%) of all day visitors. Across Malvern Hills District, almost seven out of ten visitors were classified as being in the ABC1 group (68%). Almost a third of all visitors to the District were in the DE category (32%).

New/Repeat Visitors

Over eight out of ten respondents (84%) had visited before, on a par with the survey undertaken in 2005 (85%).

Type of Previous Visit

Having identified the new and repeat elements, visitors were then asked what type of trip they had made in the past. In all, it can be seen that 71% of all visitors had previously been to Malvern Hills District as a day visitor and 15% had previously stayed overnight. 14% of repeat visitors to Malvern Hills District stated that they had been to the area before and had been for both a day and an overnight trip.

How Long Since Last Visit Made?

Day visitors were the most frequent visitors to Malvern Hills District a third (33%) returning to the District more than ten times in the past five years. The large number of day visitors whose origins lie within the county, may contribute to the high level of visitors having been more than 10 times before. 33% of domestic overnight touring visitors had only visited Malvern Hills District in the last five years.

Length of Stay

On average, overnight UK visitors spent 2.3 nights in Malvern Hills District. The sample size for overseas overnight visitors was too small for analysis purposes. The average length of stay for both day and touring visitors in the district was approximately **4 hours 10 minutes**, this included all visitors at all locations and attractions. For UK day visitors the average stay was **4 hours 11 minutes**. Domestic touring visitors stayed the longest with an average stay of **3 hours and 49 minutes**.

Main Holiday or Additional Short Break

Almost nine out of ten visitors (87%) stated that they were on an additional holiday/short break in the area whilst 13% of visitors were on a main holiday in the District.

Destinations of Stay Before and After Malvern Hills District

Two thirds (66%) of respondents interviewed indicated that they had stayed in an alternative destination before visiting Malvern Hills District. The majority were overseas visitors (80%), followed by 67% domestic touring visitors and 13% of domestic overnight visitors had stayed anywhere before arriving in the area. The majority of visitors did not intend to stay anywhere after leaving Malvern Hills District and would head straight home (72%). Domestic touring visitors (45%) were more likely to travel to another destination after leaving the district, compared with only 14% of domestic overnight visitors.

Accommodation

Hotels formed the largest part of serviced accommodation with 19% staying in a hotel in the district on their overnight visit. Camping and Caravanning was noted by 13% of respondents in the non-serviced sector,

Booking and Rating of Accommodation

Overnight visitors staying in the city commented on how they had booked their accommodation. The majority, two thirds (65%) had pre-booked directly with their establishment, 26% had booked via the Internet on sites such as Booking.Com, Caravan and Camping Club, Premier Inn, Sunshine Festival Site, Tripadvisor, holidaycottages.co.uk, Groupon, Sykes Cottages and Laterooms. 9% had booked through other means including; the river authority, family/friend, Motorhome show and Airbnb.

The majority (97%) of respondents stated that the range of accommodation available in the Malvern Hills District was good or very good. Only 3% stated that the range was average. The quality of service in the establishment at which they were staying received the second highest scores overall with 94% rating it as good or very good, with a mean score of 4.59. Value for money with a mean score (4.44), was the lowest score given for all three options with 91% respondents stating good or very good when asked.

Mode of Transport

The results show that the majority of respondents (90%) arrive by car, slightly lower than in 2005 when 93% arrived by car. The total proportion of visitors using public transport is around 4%, much less than other districts across the county.

Activities Undertaken in Malvern Hills District

Visitors were asked to indicate the main activity they would be undertaking whilst on their visit to Malvern Hills District. Visiting an attraction (37%) and walking/hiking (27%) were the **primary** motives for respondents to visit Malvern Hills District. New visitors were more likely to state walking/hiking (36%) as their main activity compared with 26% of repeat visitors. Visiting an Attraction and general sightseeing was higher amongst visitors who had been before than visitors who were in the district for the first time.

Information Usage

93% of visitors had been influenced by some form of information when planning their trip, only 7% had not.

Almost half (49%) of all respondents stated a previous visit had encouraged them to return to the area. An additional 27% stated a personal recommendation / word of mouth and 11% stated the Internet had influenced their choice to visit.

Movement around the County

Visitors to Malvern Hills District were more likely to visit other areas within the district with high levels of visitors to Malvern across all markets. Day visitors to the district were less likely to visit any other towns than domestic and overseas visitors (44%).

Attractions and Locations within Malvern Hills District

Over half of all visitors did not intend to visit any other attraction than the one they were interviewed at.

An additional 2% intended to visit Worcester Cathedral and 6% would be making a visit to Malvern Hills. However, please note that the visitors' response may be influenced by location of interview. All results exclude visitors interviewed at the named attraction, to reduce bias from their current trip. A full breakdown by attraction/location is shown in the main report.

Comments about Malvern Hills District

Most of the top responses by visitors to Malvern Hills District related to the beautiful scenery and countryside. A third of all visitors (33%) liked the views/scenery followed by 22% who mentioned the countryside/green/rural area. The walks (14%), the relaxing/peaceful and tranquil nature of the area (13%) and the Malvern Hills and beautiful area was noted by 11% of visitors respectively.

Respondents were also asked to note what had spoilt their visit to the district. Of the small amount of comments that were made, 6% related to weather and 3% gave other reasons including; smell of fish and chips, bad drivers, too many hills and shooting pheasants. Day visitors were less affected by the inclement weather than both touring and staying visitors (19% and 8% respectively).

Visitor Spend

The average spend for all visitors to Malvern Hills District is £100.75 per party per trip. With an average party size of 3.1, the expenditure rate per person is £32.90 per day.

On average, a party of day visitors in Malvern Hills District spent £42.90. With an average day visiting party size of 3.1 people, the average expenditure rate per person is £13.93 during the day. An approximate level of spend can be seen amongst the touring party sample with an average party size of 2.4 people. The expenditure rate for UK overnight visitors was £243.59 per party, with an average party size of 3.3 people, the average spend per person per trip was £74.52. The spend estimated for all overnight overseas visitors is calculated to be £474.33 per party. With an average party size of 3.7 people, £129.36 was spent per head per overnight trip by overseas visitors. However, it should be noted that the overseas expenditure is based on only 6 respondents.

1.0 Introduction and Background

1.1 Introduction

This survey was commissioned by Worcestershire & Partners help understand the nature of the different visitor markets to Malvern Hills District; why they come, what they do whilst in the area and their satisfaction with the attractions and amenities within the area.

1.2 Objectives of the Survey

The research objectives of the survey were as follows:

- To provide data on the origin, socio-demographic profile, including age, gender and social group, ethnicity and disability
- Visitor satisfaction and perception of the area, use of facilities and attractions – gather opinions of visitors to Malvern Hills District to help improve understanding of tourism within the area. Interests/activities undertaken.
- Establish visitor profiles for each sector of the visitor market, e.g. day visitor, overnight, overseas as well as new and repeat visitors
- To identify the main reasons and motivations, why visitors come to Malvern Hills District and their particular likes and dislikes, would they make return visits to the area, the decision making process, factors influencing their choice, what information is sourced and from where. Use of transport to and within the District, how far travelled to their destination
- Measure the effectiveness of signposting including highways, brown and white signs, A boards, directional signage as well as car park signs and fingerposts
- To monitor the level of tourism spend by the different market sectors
- To ensure that marketing campaigns are properly focused and allow their effectiveness to be monitored.

1.3 Survey Methodology

A questionnaire was designed for use with interviews undertaken during the period Mid July 2015 through to end of June 2016. A smaller number of interviews were conducted during the winter due to attractions that were closed and the weather. A total of 419 interviews were completed during the survey period.

The surveys were completed by trained market researchers, approaching visitors at random, over a period of weekdays and weekends, in term time and school holidays. The survey was conducted

on a simple random basis. Interviewers asked the ‘next person to pass’ if they would participate. Residents of the district in which the interviews were taking place were excluded from the research but residents from neighbouring districts were included as long as they were on a leisure day visit and not there for work or routine trips.

Questions were designed to take into account the fact that visitors could be at the beginning, middle or end of their current trip. Visitors were asked questions that involved making predictions for future actions i.e. future visits to an attraction, spending later on the trip. Such predictions are noted in the text of the report and are treated with due caution.

1.4 Statistical Reliability

All sample surveys are subject to statistical error that varies with the sample size and the order of magnitude of the research findings being considered. This survey obtained a sample of 1012 and the margins within which one can be 95% certain that the true figures in this report will lie are presented below.

Table 1: Statistical Error	
Findings from survey	95% confidence interval
50%	+/- 6.9%
40/60%	+/- 6.8%
30/70%	+/- 6.4%
20/80%	+/- 5.5%
10/90%	+/- 4.2%

This means, for example, we can be 95% certain that if 20% of the sample is found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies in the range of +/- 5.5%, i.e. between 14.5% and 25.5%.

1.5 Notes to the reader

- All percentages are rounded to the nearest whole figure so on occasions figures may not exactly equal 100%
- A “0” indicates a value of less than 0.5%
- A dash (-) indicates no value

Throughout the report, the data will be analysed by type of visitor and new and repeat visitors.

1.6 Location of Interviews

The interviews were conducted at a variety of locations including town/city centres, attractions, heritage sites, TIC's, etc. in order to gain the mix of visitor types. A list of sites across Malvern Hills District is presented in Table 2 below.

Location	Number of Interviews	Percentage
British Camp	77	18%
Witley Court	60	14%
Croome Court	58	14%
Tenbury Wells	55	13%
Malvern Theatre/Gardens	45	11%
Upton Town Centre/TIC/Heritage Centre	40	10%
Worcestershire Beacon	40	10%
Great Malvern Town Centre	24	6%
Thrill on the Hill Event	20	5%

Interviews were conducted at different periods to take into account seasonal variations and visitor behaviour and characteristics throughout the surveying period including both school and non-school periods, weekdays and weekends and an even spread of days throughout the interviewing process.

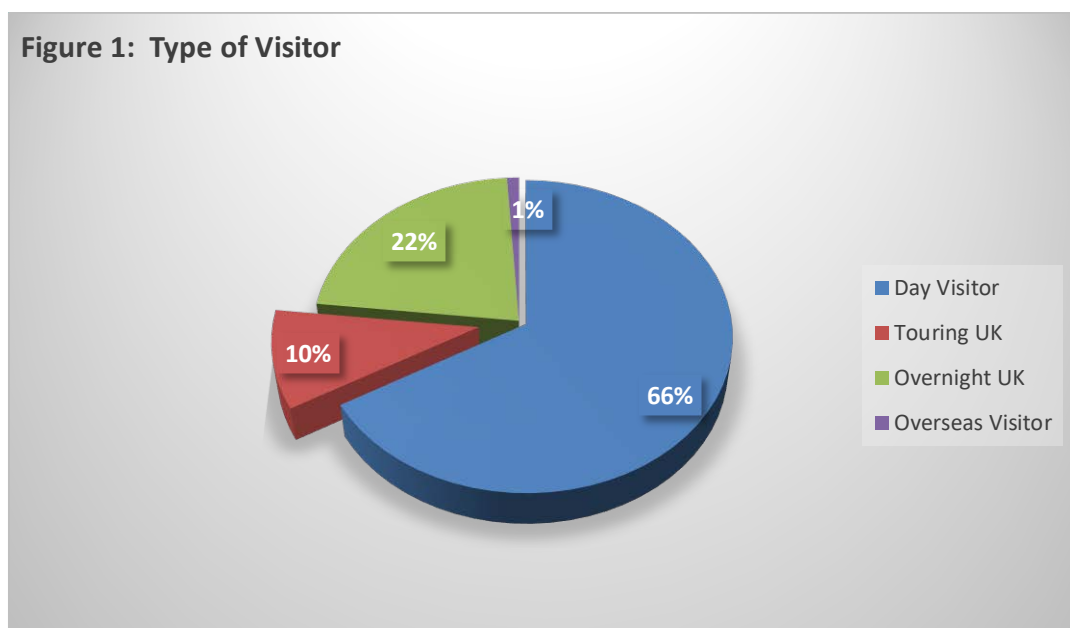
2.0 TYPE OF VISITORS

2.1 Visitor Segmentation

The survey data has been analysed in two ways. Firstly, by considering all visitors as a single market and secondly, by segmenting visitors into different groups according to the type of trip made. This approach helps to establish the differences and similarities between different types of visitor. Detailed information about various groups of visitors will assist in improving the effectiveness of marketing activities, visitor management and product development. Visitors can be divided into three segments according to the type of trip they are making to Malvern Hills District:

- ❖ **Day Visitors:** The "day out" market - visitors, who start their journey from home and return there on the same day, includes independents and groups.
- ❖ **Touring Visitors:** Those visitors who are staying overnight away from home, but are not staying overnight in Malvern Hills District. For example a family on holiday in Herefordshire may come to Malvern Hills District for a day **or** someone stopping off in Malvern Hills District en-route from home to another holiday destination.
- ❖ **Overnight Visitors:** Those visitors who spend one or more nights in the area. This sector of the market includes those staying with family and friends as well as those using commercial accommodation.

The majority of visitors were on a day visit (66%). Almost a third (32%) were visitors from other parts of the UK, either staying overnight in Malvern Hills District (22%) or visiting the area as part of a touring holiday. Only 1% of all visitors were from overseas. Results shown for the overseas market throughout this report should be seen as indicative rather than statistically robust. Figure 1 illustrates the structure of the survey sample visitor market according to the type of trip made.



Across all locations in Malvern Hills District, day visitors are more frequent than any other market, with the exception of Upton Town Centre/Heritage Centre where domestic overnight visitors dominated the market (73%). Witley Court (87%) and the Thrill on the Hill event (85%) had the highest number of day visitors.

	Day Visitor	Touring UK	Overnight UK	Overseas Visitor
British Camp	66%	12%	19%	3%
Witley Court	87%	5%	8%	-
Croome Court	60%	24%	14%	2%
Tenbury Wells	80%	7%	13%	-
Malvern Theatre/Gardens	60%	20%	16%	4%
Upton Town Centre/TIC/Heritage Centre	28%	-	73%	-
Worcestershire Beacon	55%	8%	35%	3%
Great Malvern Town Centre	79%	-	21%	-
Thrill on the Hill Event	85%	-	15%	-

Table 4 shows that repeat visitors were highest amongst day visitors and domestic overnight and touring visitors. In the overseas market, there was an even split between first time visitors and those who had visited before. However, the overseas sample is very small and should be treated as indicative rather than statistically robust.

	Day Visitor	Touring UK	Overnight UK	Overseas Visitor
New Visitor	94%	57%	70%	50%
Repeat Visitor	6%	43%	30%	50%

3.0 ORIGIN OF VISITORS

Respondents were asked to state their normal place of residence. For domestic (UK) visitors the county of origin has been used as the basis for analysis and for overseas residents the country of origin is used. The data has been analysed according to the main types of visit – day and overnight.

3.1 Day Visitors

Respondents were asked to state their normal place of residence. Over three quarters of day visitors were from the West Midlands Region (78%) with over a third (36%) of day visitors coming from within the parent county of Worcestershire.

Origin	
Worcestershire	36%
West Midlands County	29%
Gloucestershire	9%
Herefordshire	5%
Shropshire	4%
Warwickshire	3%
Derbyshire	1%
Staffordshire	1%
London / Middlesex	1%
Bath / Bristol	1%
South Wales	1%
Manchester	1%
Leicestershire	1%
Northamptonshire	1%

After Worcestershire, the second highest market is dominated by visitors coming from the West Midlands County (29%), which consists of Birmingham, Coventry, Dudley, Wolverhampton, Sandwell, Solihull and Walsall. Gloucestershire (9%) and Herefordshire (5%), followed by Shropshire (4%) and Warwickshire (3%). A full list is shown in Appendix 1.

The day visitor market is a large and often under-rated segment. Although spend per head from this sector tends to be lower than those staying overnight, the high volume of day visitors tends to provide the largest tourism spend across the Region as a whole. Core markets such as the

surrounding conurbations of the West Midlands with large populations need to be continually targeted, in order to sustain the existing level of visitor movement and subsequent expenditure.

3.2 Touring Visitors

12% all visitors to Malvern Hills District were described as "UK touring visitors". Touring visitors generally have many of the characteristics associated with the overnight visitor i.e. higher rate of expenditure, visiting attractions, origin, demographic profile, interests. These are an important market as they are people staying away from home, who have decided to visit Malvern Hills District, but are not staying overnight in the district itself.

As noted, the touring market is divided into those passing through the district en-route between destinations (i.e. from Devon to Manchester) and those who are staying overnight in the neighbouring areas and coming into Malvern Hills District for the day.

The North West Region supplies the most domestic touring visitors with almost a third (32%) coming from this area, followed by the South West (16%).

Top Counties	
West Midlands	12%
Cheshire	7%
Surrey	7%
Lancashire	5%
Cambridgeshire	5%
London / Middlesex	5%
Hertfordshire	5%
Devon	5%
South Wales	5%
North Wales	5%
Durham	2%
Manchester	2%
Yorkshire South	2%
Northamptonshire	2%

Table 6 shows that the areas of origin of UK touring visitors are very diverse, with the highest percentage of visitors travelling from the West Midlands (12%), followed by Cheshire and Surrey

each contributing 7% of visitors. Lancashire, Cambridgeshire, London, Hertfordshire, Devon, South and North Wales each supply 5% of visitors respectively. A full list is shown in Appendix 1

3.3 Overnight Visitors

Over a fifth (22%) of all visitors surveyed were UK residents staying overnight in Malvern Hills District. The overnight visitor market is of particular importance in terms of the economic impact of such visitors, not only do they stay longer than the day and touring visitor but frequently spend more on a daily basis due to associated expenditure such as accommodation costs.

Once again the West Midlands County was the highest supplier of visitors staying overnight in Malvern Hills District (24%). The large area covered by the Malvern Hills Council could be a contributing factor in that the second highest number of overnight visitors to the district come from within the parent county of Worcestershire (8%). Visitors from Surrey and South Wales contributed 5% of visitors each.

The following analysis in Table 7 show the top UK visitors staying overnight in Malvern Hills District by counties of origin. A full list is shown in Appendix 1.

Table 7: Origin of Overnight Visitors (county level)	
Top counties	
West Midlands	24%
Worcestershire	8%
Surrey	5%
South Wales	5%
Gloucestershire	4%
London / Middlesex	4%
Manchester	3%
Leicestershire	3%
Warwickshire	3%
Kent	3%
Berkshire	3%

3.4 Overseas Visitors

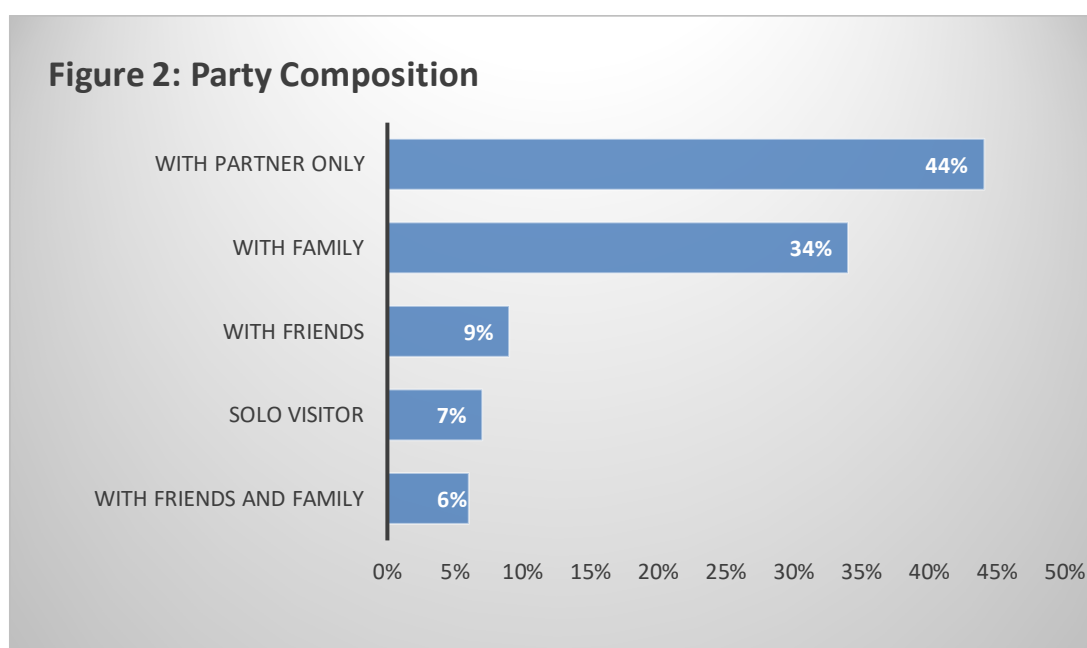
A total of 6 visitors from 6 different countries were interviewed, making up only 1% of all visitors. Generally, overseas visitors can have a significant economic impact for Malvern Hills District as a whole. However, the small number of overseas visitors cannot be described as atypical and should therefore be seen as indicative rather than statistically robust. Each of the 6 countries supplied 1 visitor each.

	Count	Percentage
Top countries	6	100%
France	1	17%
Germany	1	17%
Switzerland	1	17%
Canada	1	17%
Australia	1	17%
Other overseas	1	17%

4.0 DEMOGRAPHIC PROFILE OF VISITORS

4.1 The Sample

A total of 419 parties of visitors were surveyed. The average (mean) number of people per group was approximately 3.1 giving a total of at least 1,283 people included in the survey sample. Figure 2 and Table 9 show the breakdown of party composition compared with the county since the last survey in 2005. Respondents were asked which of the following statements given in the pie chart best described their party.



There has been little change since 2005 in terms of those visiting the district, with the exception of those visiting with their family only, which has risen from 24% in 2005 to 34% in 2015/16. This rise has come from those travelling with friends and organised groups which has seen a decline from 3% to no groups visiting in 2015/16.

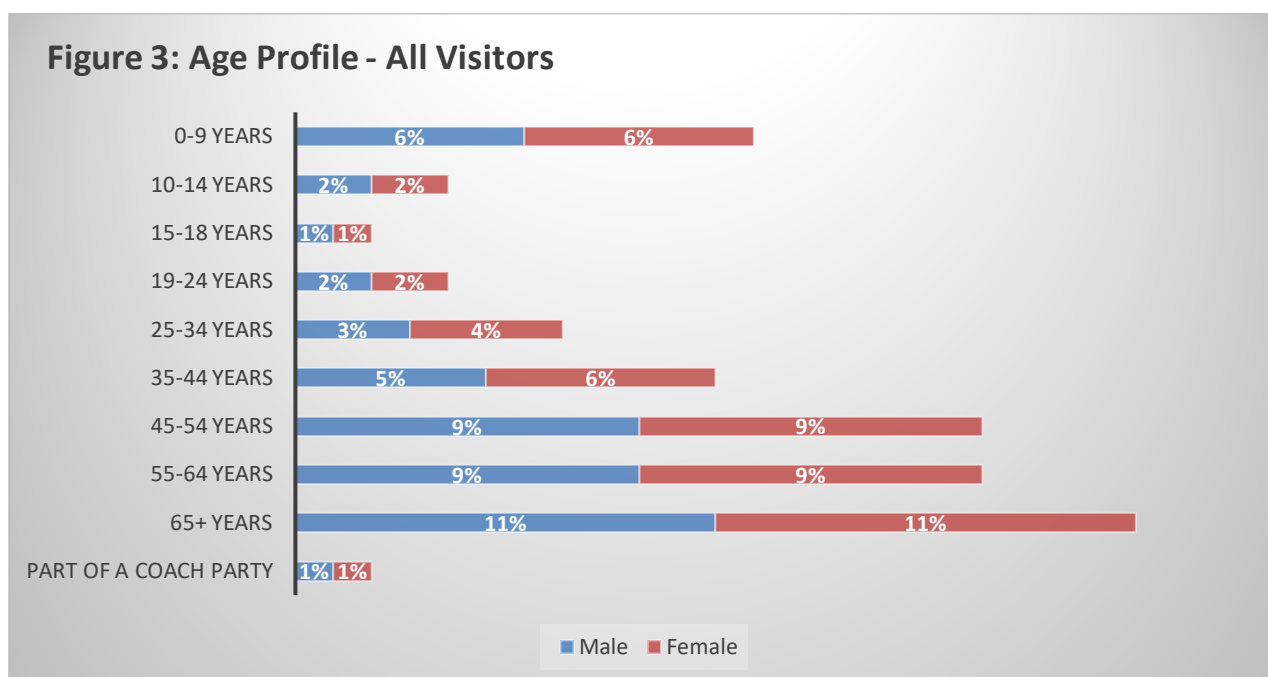
	Worcestershire	Worcestershire	Malvern Hills District	Malvern Hills District
	2005	2015/16	2005	2015/16
Visiting Alone	10%	8%	7%	7%
With Spouse / Partner	41%	39%	46%	44%
With Family	26%	36%	24%	34%
With Friends	12%	10%	12%	9%
With Friends and Family	6%	6%	8%	6%
Organised Group	5%	1%	3%	-

Table 10: Structure of Visiting Parties

	Total	Day Visitor	Touring UK	Overnight UK	Overseas
Visiting Alone	7%	7%	7%	5%	17%
With Spouse / Partner	44%	39%	64%	49%	33%
With Family	34%	37%	21%	28%	33%
With Friends	9%	10%	5%	8%	-
With Friends and Family	6%	6%	2%	10%	17%
Organised Group	-	1%	-	-	-

NB: Figures do not add up to 100% due to rounding

Across all markets, the majority of groups interviewed were adult couples and family groups. The domestic touring market (64%) and overnight market (49%) saw higher numbers of adult couples than both day visitors (39%) and overseas visitors (33%). Visitors travelling with friends and family accounted for almost half (49%) of all day visitors. However please note that numbers may be influenced by interview location. I.e. certain attractions attract certain markets.

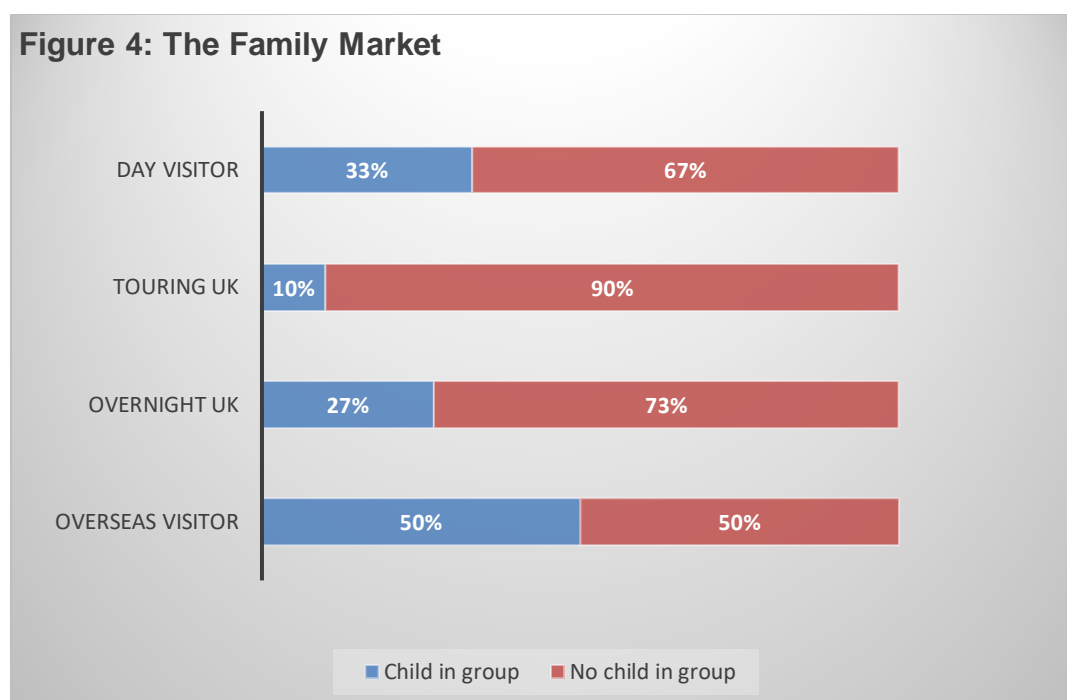


Six out of ten (60%) of visitors to Malvern Hills District were Over the age of 45, with the split of male and female visitor ratio 50:50.

	Male	Female	Total
0-9 years	6%	6%	12%
10-14 years	2%	2%	4%
15-18 years	1%	1%	2%
19-24 years	2%	2%	4%
25-34 years	3%	4%	7%
35-44 years	5%	6%	11%
45-54 years	9%	9%	18%
55-64 years	9%	9%	18%
65+ years	11%	11%	22%
Organised Group	1%	1%	2%
TOTAL	49%	51%	100%

4.2 The Family Market

The survey was undertaken during weekends/weekdays, school holidays and term time. The proportion of family groups varies by type of visitor (trip), time and the interview location.



A greater proportion of groups with children can be seen amongst the day visitor market where a third (33%) of day visitor groups contained children. Excluding the overseas market due to the low sample size, the lowest proportion of children is in the domestic touring market where only 10% of touring groups contained children in their party.

4.3 Day Visitors

A total of 278 groups of day visitors provided demographic data for analysis, giving an average (mean) of 3.1 people per group - a total of at least 856 people included in the survey sample. Over a third (39%) of day visitors were visiting as part of a couple. Day visitors travelling with only family members accounted for a further 37% of visitors. The structure of these groups is shown below in Figure 5 and Table 12.

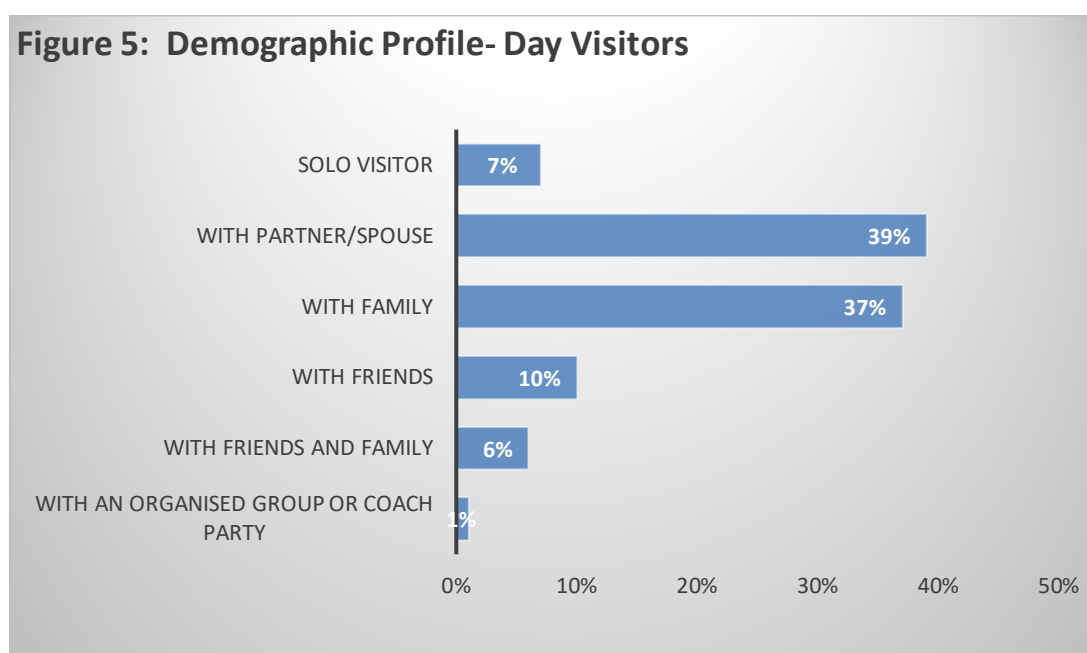


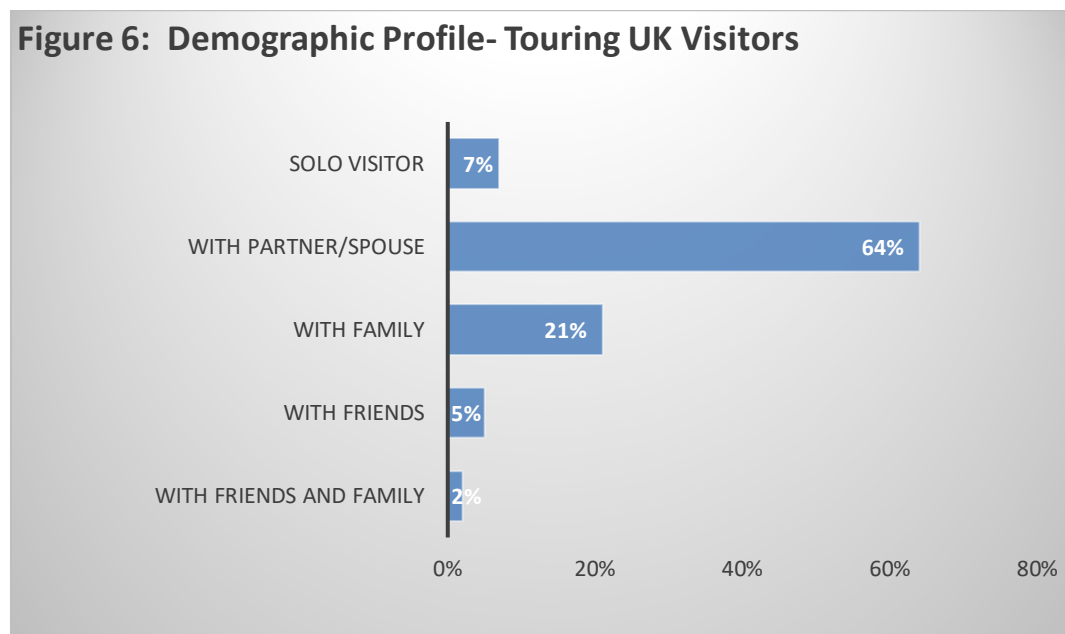
Table 12: Age Groups – Day Visitor

	Male	Female	Total
0-9 years	7%	6%	13%
10-14 years	2%	2%	4%
15-18 years	1%	1%	2%
19-24 years	2%	2%	4%
25-34 years	3%	5%	8%
35-44 years	5%	7%	12%
45-54 years	8%	8%	16%
55-64 years	8%	10%	18%
65+ years	10%	10%	20%
Organised Group	1%	1%	2%
TOTAL	47%	52%	99%

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

4.4 Touring (UK) Visitors

A total of 42 touring (UK) groups, comprising 101 people in total provided demographic data, giving an average (mean) of 2.4 people per group.



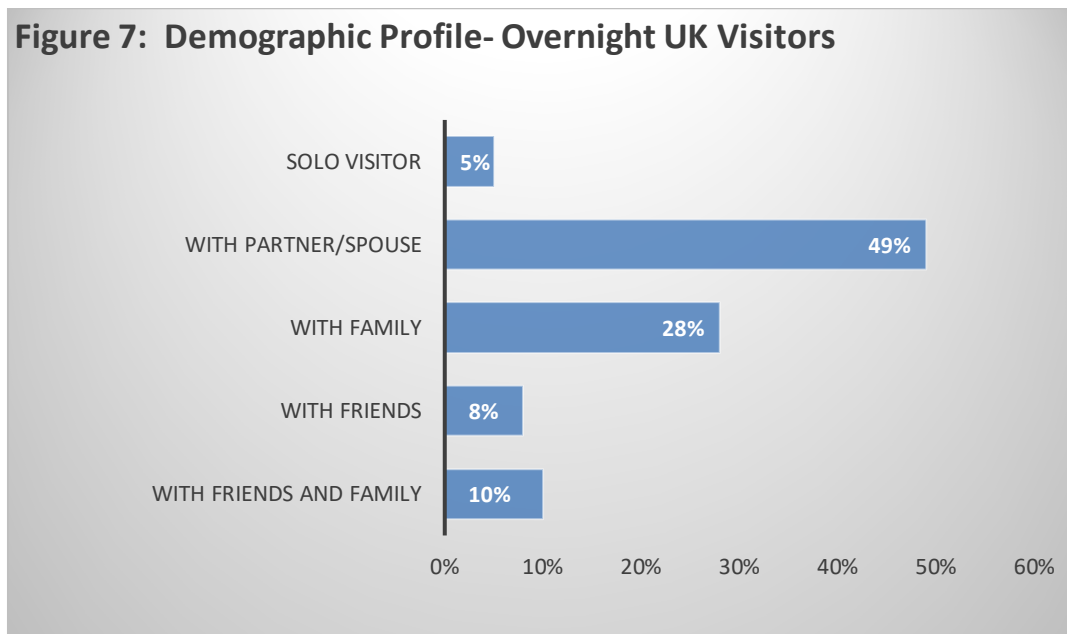
The domestic touring market is dominated by visitors travelling as a couple (64%) and over half (51%) are aged 55 years and over. Visitors travelling by themselves account for only 7% of visitors. Slightly more females than males made up the age groups in the domestic touring market (51:48).

Table 13: Age Groups – Touring UK			
	Male	Female	Total
0-9 years	2%	2%	4%
10-14 years	1%	1%	2%
15-18 years	1%	-	1%
19-24 years	-	1%	1%
25-34 years	4%	4%	8%
35-44 years	2%	2%	4%
45-54 years	13%	15%	28%
55-64 years	9%	9%	18%
65+ years	16%	17%	33%
Organised Group	-	-	-
TOTAL	48%	51%	99%

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

4.5 Overnight (UK) Visitors

93 groups of domestic overnight visitors comprising 304 people in total provided demographic data, giving an average (mean) of 3.3 people per party.



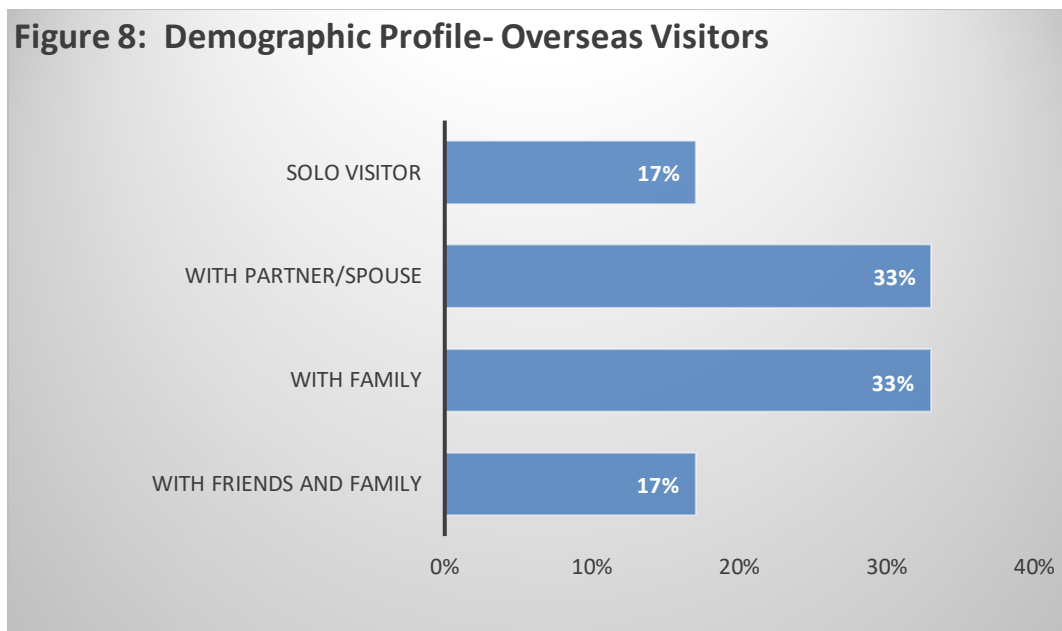
Like the day and touring market, almost half (49%) of domestic overnight visitors were on a trip with their partner/spouse. In total, 46% of overnight visitors from the UK were on a trip with their family and friends. The type of trip and specific events/attractions may be a contributory factor in this case. The split between males and females in the domestic overnight market was even at 47:54.

Table 14: Age Groups – Overnight UK			
	Male	Female	Total
0-9 years	4%	6%	10%
10-14 years	2%	3%	5%
15-18 years	1%	1%	2%
19-24 years	3%	3%	6%
25-34 years	3%	4%	7%
35-44 years	5%	6%	11%
45-54 years	10%	11%	21%
55-64 years	10%	8%	18%
65+ years	9%	12%	21%
Organised Group	-	-	-
TOTAL	47%	54%	101%

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

4.6 Overseas Visitors

Due to the low number of overseas visitors the touring and overnight markets have been combined for analysis purposes. Only 6 groups of overseas visitors comprising 22 people in total provided demographic data, giving an average (mean) of 3.7 people per party.



There was an even split between visitors travelling with their partner and those on a trip with their family (33% respectively). There were more females than males (63:38 ratio) from those respondents travelling from overseas.

Table 15: Age Groups – Overseas Visitors			
	Male	Female	Total
0-9 years	11%	17%	28%
10-14 years	-	-	-
15-18 years	-	-	-
19-24 years	-	-	-
25-34 years	-	6%	6%
35-44 years	11%	6%	16%
45-54 years	5%	17%	22%
55-64 years	-	-	-
65+ years	11%	17%	28%
Organised Group	-	-	-
TOTAL	38%	63%	101%

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

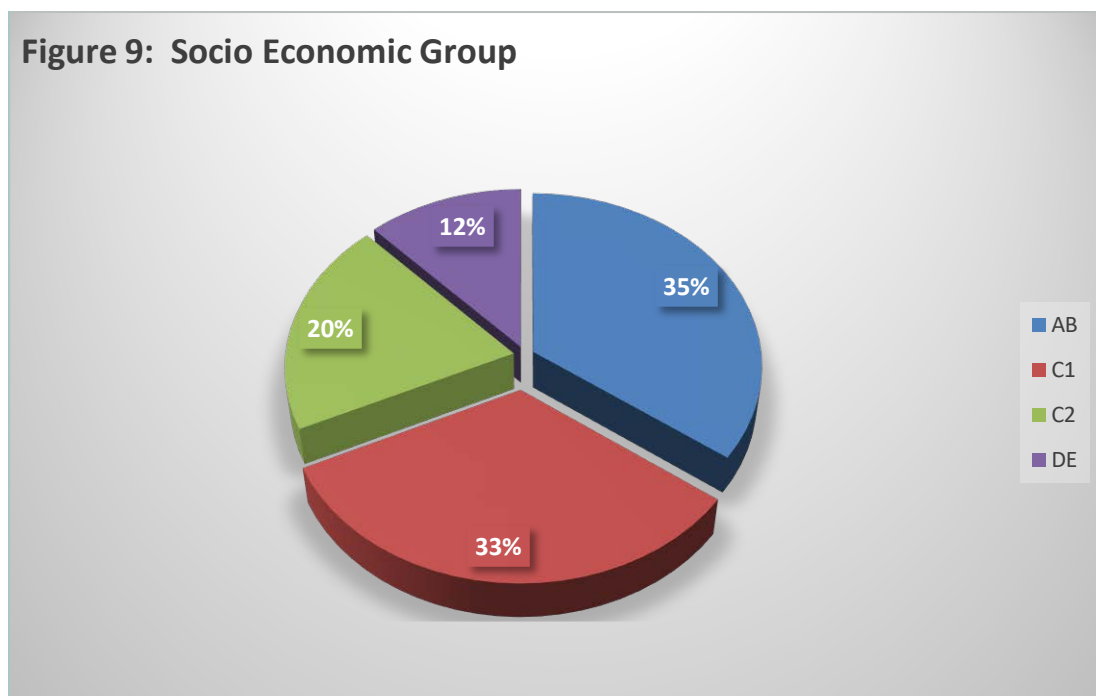
5.0 SOCIO ECONOMIC GROUPINGS

5.1 Categorising the visitor

Visitors were asked to describe the occupation of the chief wage earner in their household and to indicate by means of a show card which socio-economic group they thought applied. All responses were crosschecked with any misleading cases removed from this analysis. It is accepted that this method provides a rough guide to the type of visitor in the district. If a more accurate profiling of visitors is required, use can be made of the UK postcodes supplied for PIN analysis.

The key to the groups is based upon the Market Research Society standards. In broad terms the groups are as follows.

- AB Managerial, administrative or professional at senior or intermediate level
- C1 Supervisory, clerical (i.e. white collar), junior administrative or professional
- C2 Skilled manual worker
- DE Semi-skilled and unskilled manual worker retired state pensioner
- Casual earner, unemployed



Across Malvern Hills District, almost seven out of ten visitors were classified as being in the ABC1 group (68%). Almost a third of all visitors to the District were in the DE category (32%).

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitor
AB	35%	33%	43%	38%	50%
C1	33%	34%	36%	30%	33%
C2	20%	21%	12%	22%	-
DE	12%	12%	10%	11%	17%

Comparing the structure of the three domestic markets it is evident that the proportion of ABC1 visitors varies in each segment. The touring UK market in Malvern Hills District has 78% ABC1 visitors, higher than the overnight UK market (68%) and day visitor market (64%). The overseas proportion of ABC1 visitors is higher than all three other markets, with 83% falling into this category. However, as previously noted, the small sample size should be treated with caution when basing any marketing activities on these results.

Overall, the C2 and DE market comprises 32% of the market. The day visitor market and the domestic overnight market has the highest number of both C2 and DE respondents (33% respectively), higher than both touring market (22%) and considerably higher than the overseas market (17%).

	Total	New	Repeat
AB	35%	46%	33%
C1	33%	27%	35%
C2	20%	18%	20%
DE	12%	9%	12%

Almost three quarters of all new visitors were in the higher ABC1 category (73%), compared with 68% of visitors who had been to Malvern Hills District before. Repeat visitors had the most DE respondents visiting the district.

6.0 REPEAT VISITORS

6.1 Segment Variation

Visitors were asked if they had ever been to Malvern Hills District on a previous occasion and if so what type of trip it had been. Over eight out of ten respondents (84%) had visited before, on a par with the survey undertaken in 2005 (85%).

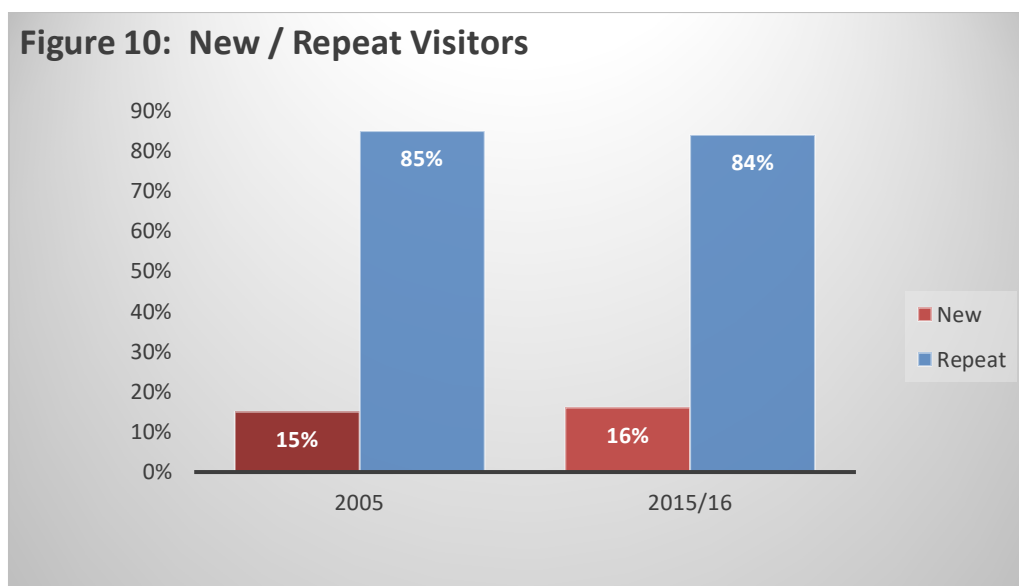


Figure 10 suggests that the tourism product in Malvern Hills District is meeting the expectations of its visitors, with the high level of visitors making a return visit to the district. With just over a sixth of all visitors interviewed, in Malvern Hills District for the first time, it also shows that the district has an appeal to visitors who are making their first trip to the area.

Further research indicates that there is variation in new and repeat trade between the market segments. The repeat ratio for day visitors is 92%, whilst the overnight visitor market has four out of ten (40%) new visitors to 60% repeat visitor split.

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitor
New	16%	6%	43%	30%	50%
Repeat	84%	94%	57%	70%	50%

Table 19 shows the proportion of new and repeat visitors to each location within Malvern Hills District. Great Malvern town centre (4%) and Upton Town Centre/Heritage Centre (7%) have the lowest levels of newcomers, whilst the Malvern Theatre/Gardens and Witley Court have the highest proportion of all new visitors to the area (23% and 22% respectively).

Table 19: New / Repeat Visitor by Location		
	New	Repeat
British Camp	27%	73%
Croome Court	10%	90%
Witley Court	22%	78%
Upton Town Centre / TIC	7%	93%
Tenbury Wells Town Centre	11%	89%
Malvern Theatre / Gardens	23%	78%
Worcestershire Beacon	15%	85%
Great Malvern Town Centre	4%	96%
Thrill on the Hill	10%	90%

6.2 Types of Previous Visits to Malvern Hills District

Having identified the new and repeat elements, visitors were then asked what type of trip they had made in the past. In all, it can be seen that 71% of all visitors had previously been to Malvern Hills District as a day visitor and 15% had previously stayed overnight.

14% of repeat visitors to Malvern Hills District stated that they had been to the area before and had been for both a day and an overnight trip.

Figure 11: Type of Previous Visit

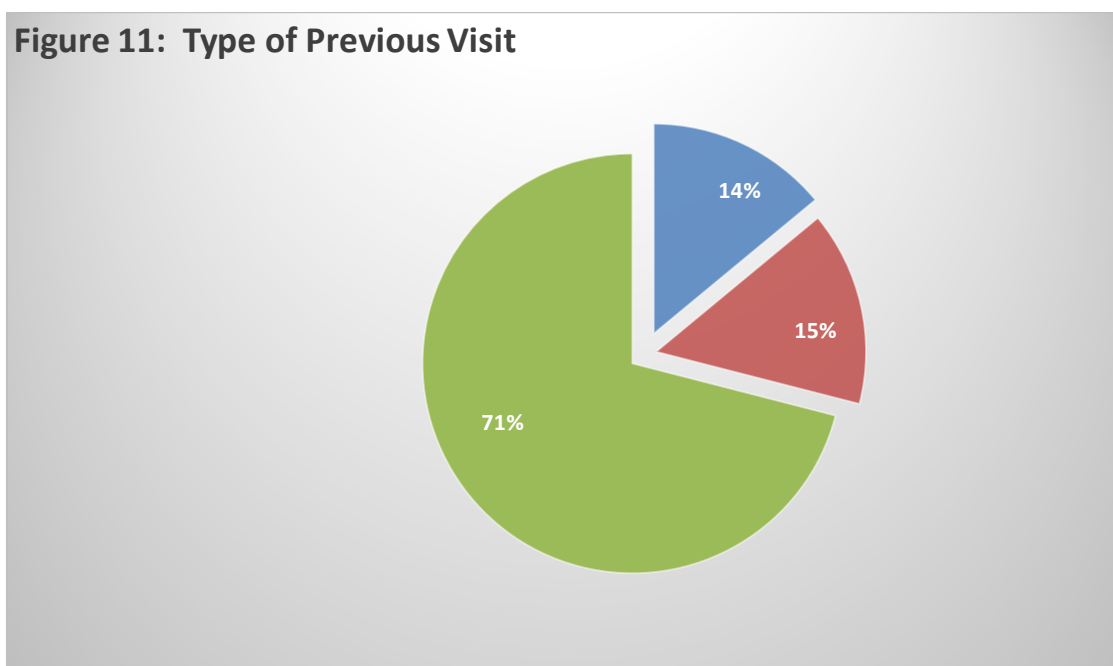


Table 20 highlights the different characteristics of the market segments with respect to the type of previous visit they had made.

Table 20: Previous Visit by Type of Visitor					
	Total	Day Visitor	Touring UK	Overnight UK	Overnight Visitor
Previous Day visit	71%	94%	33%	14%	33%
Previous Overnight	15%	1%	42%	46%	67%
Both	14%	5%	25%	40%	-

Of the day visitors who had been to Malvern Hills District on a previous visit, almost all were undertaking a similar trip to that taken last time, i.e. they had previously been on a day trip and were here on a day trip again. A small proportion had also been before as an overnight visitor (1%) and 5% had previously visited for both an overnight stay and for the day.

Looking at the overnight UK visitors, almost half (46%) had previously been on an overnight visit. A third (33%) of touring visitors had now converted from a day trip on their previous visit to a touring trip this time. In essence this change can represent greater expenditure as a touring visitor.

6.3 Time since last visit to Malvern Hills District

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

	Total	Day Visitor	Touring UK	Overnight UK	Overseas*
None	5%	5%	8%	6%	-
Once	13%	12%	33%	5%	67%
Twice	15%	14%	17%	17%	-
3-5 times	21%	20%	17%	26%	33%
6-10 times	16%	16%	17%	17%	-
More than 10 times	30%	33%	8%	29%	-

**Small sample base – results should be viewed as indicative rather than statistically robust*

There were high numbers of visitors across all markets who had made multiple trips to Malvern Hills District over the last 5 years. Day visitors were the most frequent visitors to Malvern Hills District a third (33%) returning to the District more than ten times in the past five years. The large number of day visitors whose origins lie within the county, may contribute to the high level of visitors having been more than 10 times before. 33% of domestic overnight touring visitors had only visited Malvern Hills District in the last five years.

7.0 LENGTH OF STAY

7.1 Length of Stay in Malvern Hills District

Visitors were asked how long their whole trip was and how long they envisaged staying overnight in Malvern Hills District. On average, overnight UK visitors spent 2.3 nights in Malvern Hills District. The sample size for overseas overnight visitors was too small for analysis purposes.

The following Table 22 illustrates the breakdown of length of stay in Malvern Hills District for domestic visitors staying overnight.

		UK Overnight
Short Breaks (87%)	1 night	27%
	2 nights	43%
	3 nights	17%
Long Stays (9%)	4 nights	7%
	5 nights	5%
	8+ nights	1%

As the table shows, length of stay for staying domestic visitors, is dominated by a short break of 1 to 3 nights (87%) compared with only 13% stopping in the district for a longer stay of over 4 nights.

Although the Staycation marketing campaign over the last few years encouraged domestic visitors to take their main holiday in England, there is still a propensity to favour short breaks in the UK and main holidays abroad. The West Midlands region continues to be a predominantly short break market for the leisure visitor.

7.2 Retaining visitors

Another measure of Malvern Hills District appeal to visitors is to ask, of X number of nights available to a visitor on holiday, how many is the visitor prepared to spend in the District. A visitor from Scotland, for example, having 10 nights available who decides to spend 5 nights in Leicestershire, 3 nights in Birmingham and 2 nights in Malvern Hills District provides an index of 0.5, 0.3 and 0.2 respectively for the aforementioned centres.

For the UK residents staying overnight in the area:

Total Nights in Malvern Hills District 82

Total Nights on Trip 255

This gives an index rate of 0.32 or, that UK visitors elected to spend around 32% of their available nights in Malvern Hills as part of a multi-centre touring trip.

7.3 Day / Touring Visitors length of stay

294 responding domestic visitors surveyed who were in Malvern Hills District for a day or touring trip, were asked how long (in hours) they intended to spend in the area. The average length of stay for both day and touring visitors in the district was approximately **4 hours 10 minutes**, this included all visitors at all locations and attractions. For UK day visitors the average stay was **4 hours 11 minutes**. Domestic touring visitors stayed the longest with an average stay of **3 hours and 49 minutes**. Due to lack of sample, we are unable to show figures for the overseas touring market.

Table 23: All Day / Touring Visitor Hours in Malvern Hills District

	Total	Day Visitor	Touring UK
1-3 hours	40%	39%	50%
4-6 hours	52%	52%	33%
7+ hours	9%	9%	6%

NB: Numbers may add up to more than 100% due to rounding

UK touring visitors stayed the longest in the district with almost 50% spending between 1-3 hours compared with 39% of day visitors. There were very few visitors from the day and UK touring market that stayed for more than 7 hours.

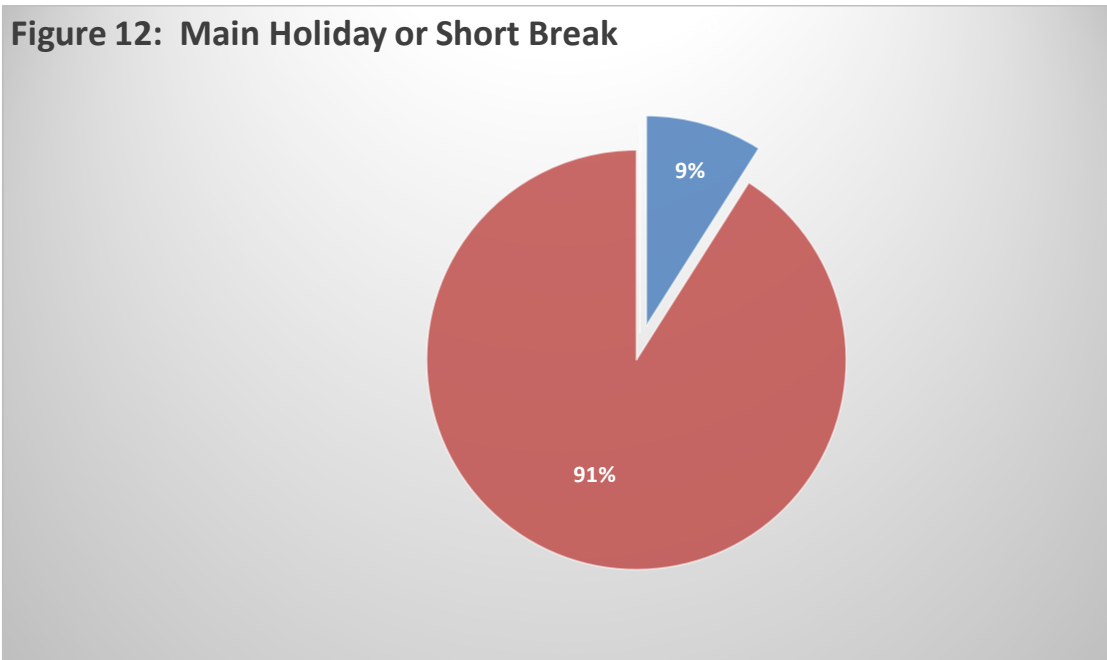
Over a half (54%) of first time visitors stayed in the district for between 4-6 hours, compared with 51% of repeat visitors. Six out of ten repeat visitors (60%) were in the area for over 4 hours compared with 58% of new visitors.

	Total	New	Repeat
1-3 hours	40%	42%	40%
4-6 hours	52%	54%	51%
7+ hours	9%	4%	9%

8.0 MAIN HOLIDAY OR ADDITIONAL SHORT BREAK

Overnight visitors to Malvern Hills District were asked whether their trip was part of a main holiday or an additional holiday/short break.

Almost nine out of ten visitors (87%) stated that they were on an additional holiday/short break in the area whilst 13% of visitors were on a main holiday in the District.



Both domestic overnight and touring visitors were more likely to be on a short break (96% and 85% each) than on a main holiday.

	Total	Touring UK	Overnight UK	Overseas Visitor
Main holiday	13%	15%	4%	33%
Additional holiday/short break	87%	85%	96%	67%

NB: In order to make the overseas sample statistically reliable overnight and touring overseas visitors have been combined.

When looking at new and repeat visitors, there was a fairly even split of respondents who had visited Malvern Hills District on a previous occasion and who were on an additional holiday/short break (89% and 92% respectively).

9.0 DESTINATIONS OF STAY BEFORE AND AFTER MALVERN HILLS DISTRICT

9.1 Destinations of stay before visiting Malvern Hills District

Two thirds (66%) of respondents interviewed indicated that they had stayed in an alternative destination before visiting Malvern Hills District. The majority were overseas visitors (80%), followed by 67% domestic touring visitors and 13% of domestic overnight visitors had stayed anywhere before arriving in the area.

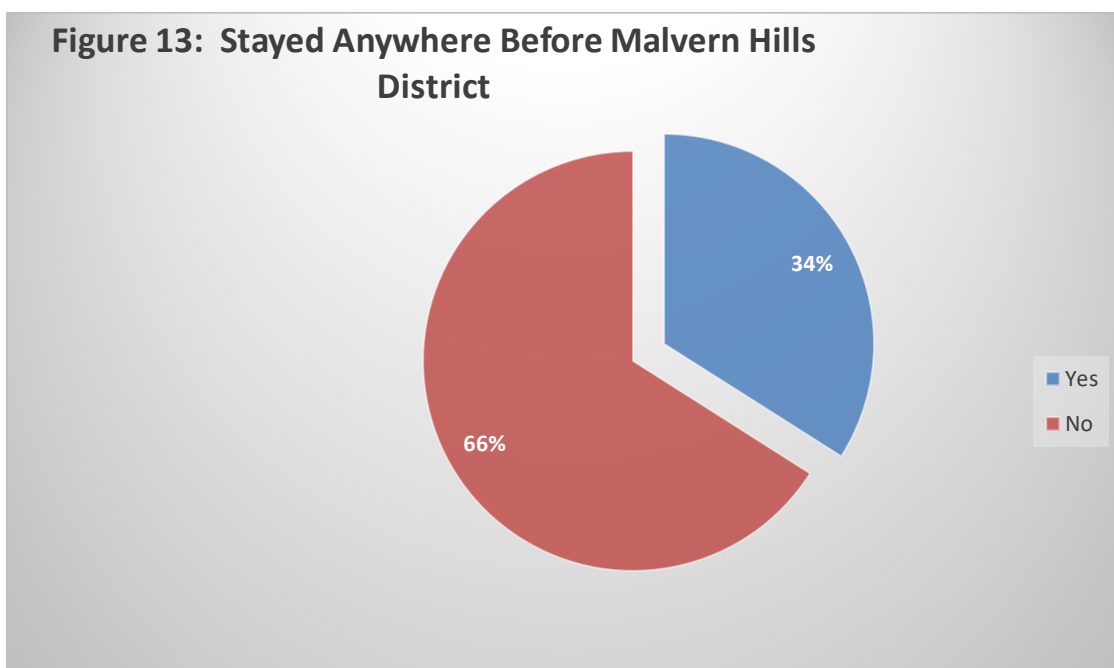


Table 26: Stayed Before Malvern Hills District - Type of Visitor

	Total	Touring UK	Overnight UK	Overseas Visitor
Yes	34%	67%	13%	80%
No	66%	33%	87%	20%

Respondents were asked where they had stayed before their arrival in Malvern Hills District. The list of places were varied and wide spread with the main locations cited as: Worcester, Hereford, Birmingham, Ledbury and Gloucester.

The majority of visitors did not intend to stay anywhere after leaving Malvern Hills District and would head straight home (72%). Domestic touring visitors (45%) were more likely to travel to another destination after leaving the district, compared with only 14% of domestic overnight visitors.

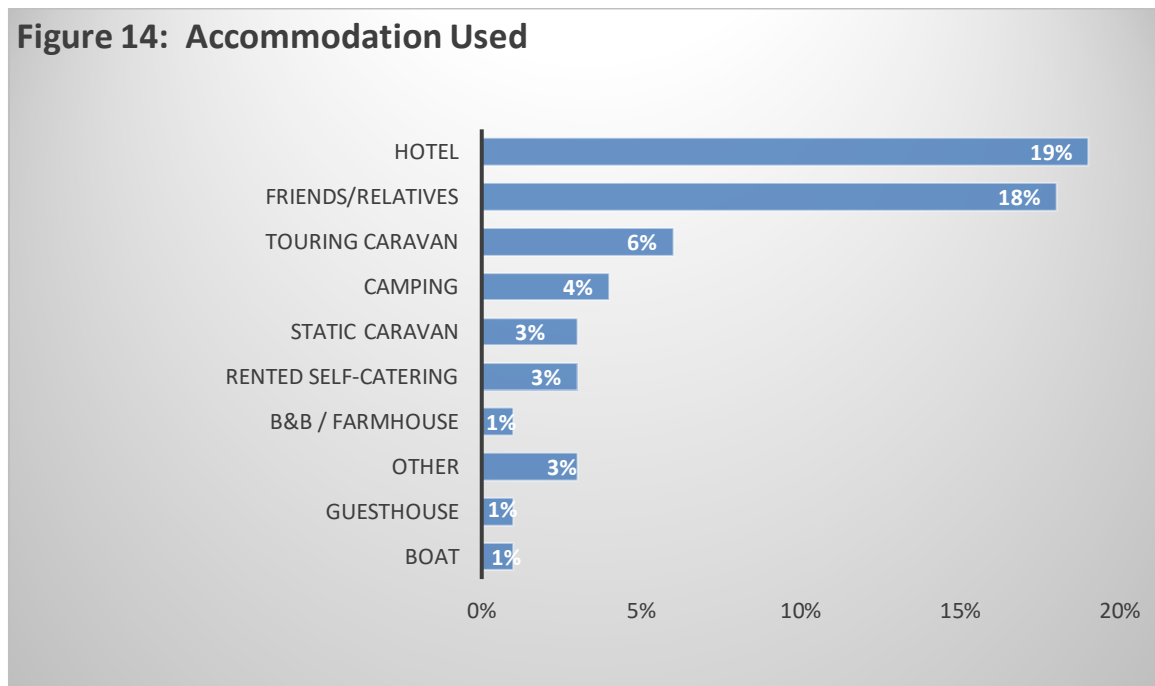
	Total	Touring UK	Overnight UK	Overseas Visitor
Yes	28%	45%	14%	100%
No	72%	55%	86%	-

Visitors were also asked where they were staying after visiting Malvern Hills District. Again, destinations were varied and other destinations within Worcestershire including; Evesham, Worcester, Wickhamford, Kidderminster and Broadway. Of those going further afield, Ledbury, London, Birmingham, Ludlow, Cheltenham, Devon, Cornwall, Chester and Somerset were noted by respondents.

10.0 ACCOMMODATION

10.1 Accommodation used in Malvern Hills District

Figure 14 shows the type of accommodation used by overnight visitors staying in Malvern Hills District.



'Other' includes youth hostels, second home and university accommodation

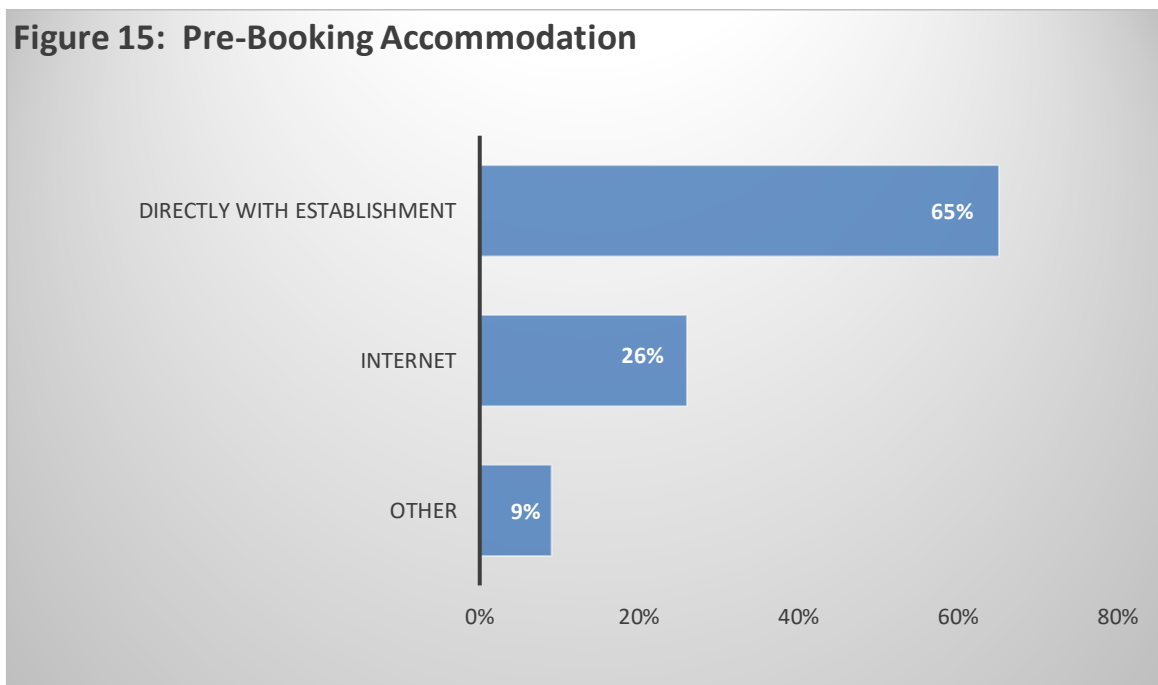
There was a range of both serviced and non-serviced accommodation used within Malvern Hills District, with 21% choosing to stay in some type of serviced accommodation. Hotels formed the largest part of serviced accommodation with 19% staying in a hotel in the district on their overnight visit. Camping and Caravanning was noted by 13% of respondents in the non-serviced sector, comprising of 6% staying in a touring caravan, 3% in a static caravan and 4% stopping under canvas. Just under a fifth (18%) were staying with friends or relatives (VFR) in the district. This is always an under-estimated and under-appreciated market. In fact, VFR represents a significant proportion of all trips to the UK – 50% of all domestic trips and 39% of overseas visitors stay with friends and relatives.

New overnight visitors made more use of commercial accommodation than those who had been before. More repeat visitors (23%) stayed with friends and family than those on a first visit (7%).

It is important to remember that the impact of the overnight visitor market only becomes apparent when taking into account the additional factors such as; length of stay, spend per head, number of people per group, distribution of expenditure within the local economy etc.

10.2 Pre-booking of Accommodation

Of the visitors staying overnight (excluding those visitors staying with friends and relatives), the majority, two thirds (65%) had pre-booked directly with their establishment, 26% had booked via the Internet on sites such as Booking.Com, Caravan and Camping Club, Premier Inn, Sunshine Festival Site, Tripadvisor, holidaycottages.co.uk, Groupon, Sykes Cottages and Laterooms. 9% had booked through other means including; the river authority, family/friend, Motorhome show and Airbnb.



10.3 Rating of Accommodation

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

	Mean	Very Good	Good	Average	Poor	Very Poor
Range of accommodation in district	4.59	63%	34%	3%	-	-
Quality of service where you are staying	4.59	66%	28%	6%	-	-
Value for money where you are staying	4.44	53%	38%	9%	-	-

Ratings given to accommodation establishments in Malvern Hills District were generally high, with an average (mean) score of over 4 out of 5 given to each of the options shown in the table above. The majority (97%) of respondents stated that the range of accommodation available in the Malvern Hills District was good or very good. Only 3% stated that the range was average.

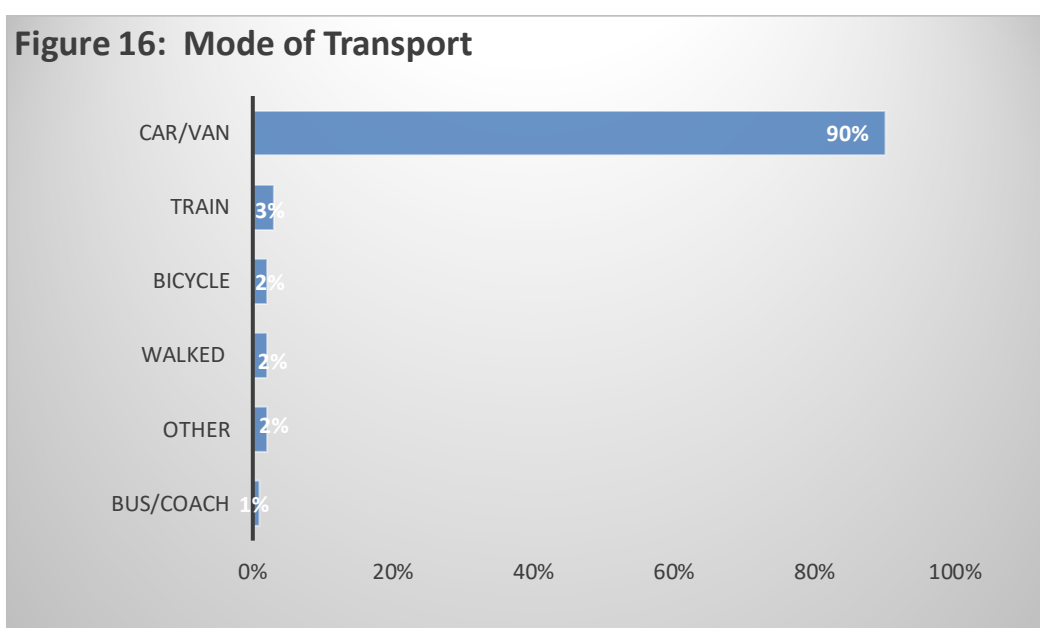
The quality of service in the establishment at which they were staying received the second highest scores overall with 94% rating it as good or very good, with a mean score of 4.59.

Value for money with a mean score (4.44), was the lowest score given for all three options with 91% respondents stating good or very good when asked. However, this score is still very high and only slightly lower than both range and quality of service scores.

11.0 MODE OF TRANSPORT

11.1 Car is Dominant Transport Mode

The principal mode of transport used to arrive at a visitor destination is the car, this is consistently the same for most visitor surveys. The results show that the majority of respondents (90%) arrive by car, slightly lower than in 2005 when 93% arrived by car. The total proportion of visitors using public transport is around 4%, much less than other districts across the county.



The transport mode varied very little between the various markets visiting the district. For example, 92% of day visitors came by private car, as did 90% of touring domestic visitors and 85% of domestic staying visitors. Use of any other form of transport was low across all markets.

Table 29: Transport by Type of Visitor

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitor
Car/motorcycle/van	90%	92%	90%	85%	83%
Train	3%	2%	2%	4%	-
Bicycle	2%	1%	5%	1%	-
Walked	2%	3%	-	-	-
Other	2%	-	2%	8%	17%
Bus/Coach	1%	1%	-	1%	-

The use of the car was slightly higher amongst new visitors (96%) compared with 89% of respondents visiting Malvern Hills District on a repeat visit.

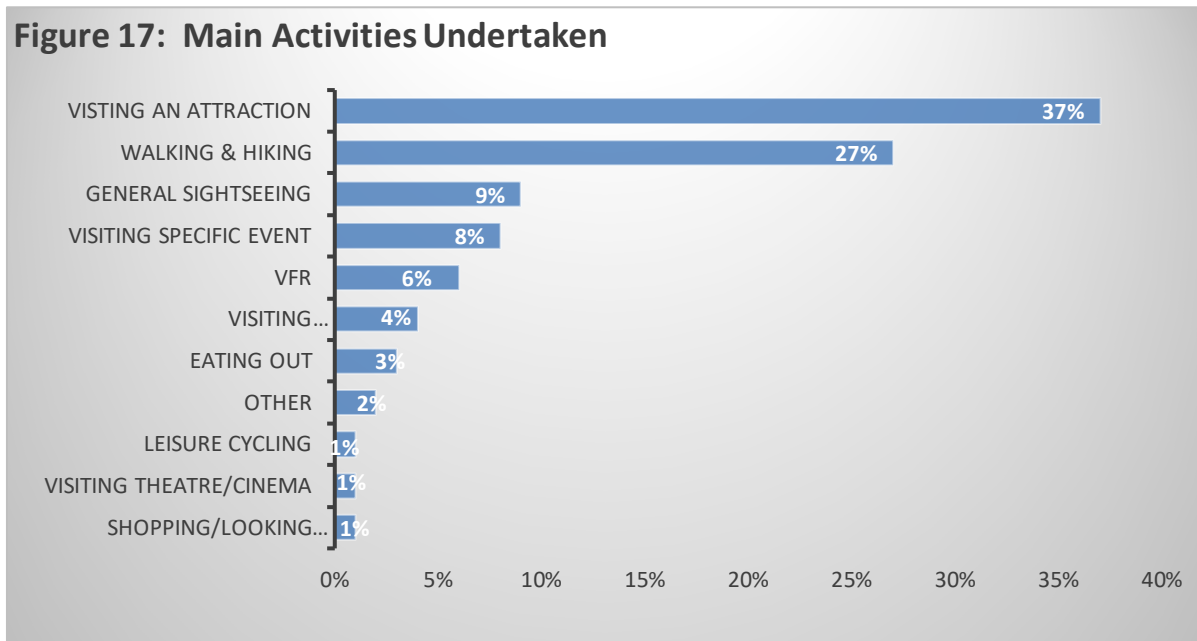
Table 30: Transport by New and Repeat Visitors			
	Main	New	Repeat
Car/motorcycle/van	90%	96%	89%
Train	3%	1%	3%
Bicycle	2%	-	2%
Walked	2%	-	2%
Other	2%	3%	2%
Bus/Coach service	1%	-	1%

12.0 ACTIVITIES UNDERTAKEN WHILST IN THE DISTRICT

12.1 Activities Undertaken

Visitors were shown a "show card" listing a range of activities and asked to indicate which had been the **MAIN** activity that they had been involved in whilst in the district. Only one answer was given per party.

Figure 17 indicates that visiting an attraction (37%) and walking/hiking (27%) were the **primary** motives for respondents to visit Malvern Hills District.



Please note that the majority of interviews were undertaken at tourist attractions and city centres locations. Therefore, some bias may exist within results.

General sightseeing (9%) and visiting a specific event was noted by 8% of visitors. All visitors undertook a variety of activities whilst in the district, emphasising the choice on offer to visitors whilst on a trip to the area.

Table 31: Activities undertaken by New and Repeat Visitors			
	Main	New	Repeat
Visiting an attraction	37%	27%	39%
Walking & hiking	27%	36%	26%
General sightseeing	9%	7%	10%
Visiting specific event	8%	7%	8%
VFR	6%	12%	4%
Visiting historic/heritage site	4%	3%	4%
Eating out	3%	6%	3%
Other	2%	-	3%
Leisure Cycling	1%	-	1%
Visiting the theatre/cinema	1%	-	1%
Shopping / looking around the shops	1%	1%	1%
Watching sport	-	1%	-

New visitors were more likely to state walking/hiking (36%) as their main activity compared with 26% of repeat visitors. Visiting an Attraction and general sightseeing was higher amongst visitors who had been before than visitors who were in the district for the first time.

12.2 Main Activities Undertaken by Market Segment

Visiting an attraction and walking/hiking were the top two activities noted by 44% of day visitors compared with 27% of all touring visitors and 21% of domestic overnight visitors. Visiting a specific event was higher amongst domestic overnight visitors (23%) than all other markets. Visiting friends and relatives was highest amongst overseas visitors (33%).

Table 32: Main Activities Undertaken by Type of Visitor

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
Visiting an attraction	37%	44%	27%	21%	-
Walking & hiking	27%	26%	37%	28%	17%
General sightseeing	9%	10%	10%	7%	17%
Visiting specific event	8%	4%	2%	23%	17%
VFR	6%	1%	12%	13%	33%
Visiting historic/heritage site	4%	5%	2%	2%	-
Eating out	3%	3%	7%	2%	17%
Other	2%	3%	-	1%	-
Leisure cycling	1%	1%	2%	-	-
Visiting the cinema/theatre	1%	1%	-	1%	-
Shopping/looking around shops	1%	1%	-	-	-
Watching sport	1%	-	-	1%	-

NB: Totals may not add up to 100% due to rounding, Other activities included a picnic, going to the park, dog walking, and meeting friends.

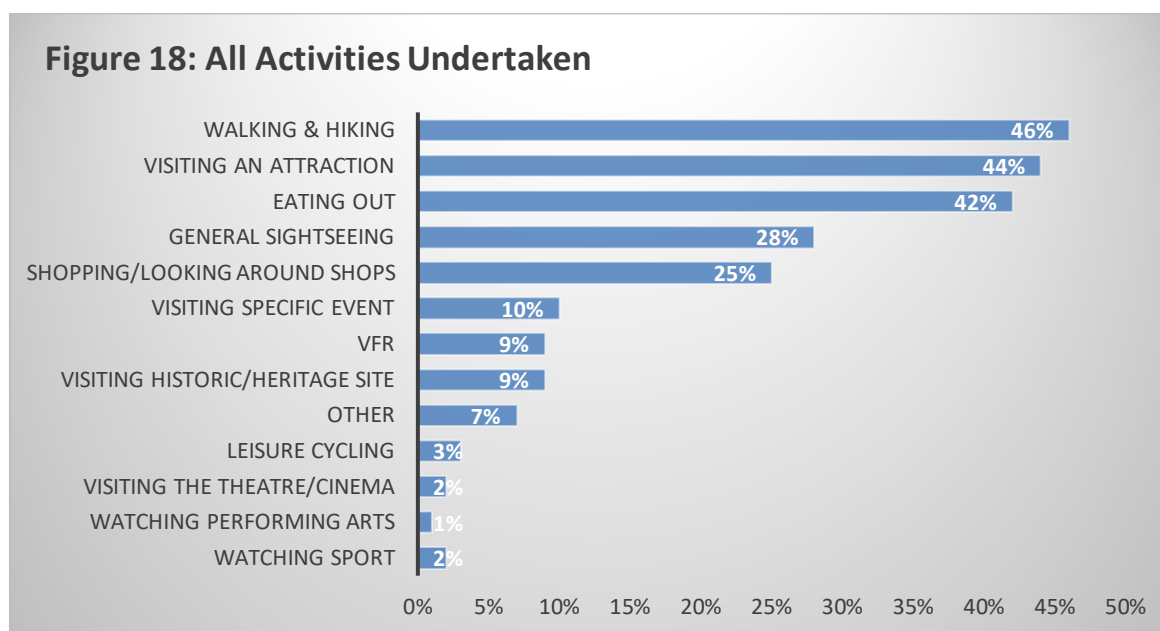
Many of the activities undertaken in Malvern Hills District were spend related activities: These activities bring revenue into the area and are important for the local economy. Overnight and overseas visitors are more likely to carry out a wider range of spend related activities, thus they are of greater financial value.

12.3 All Activities Undertaken in Malvern Hills District

Visitors were again shown a "show card" listing a range of activities and asked to indicate which other activities that they had been involved in whilst in the district. On this occasion more than one answer could be given – therefore results may add up to more than 100%.

Figure 18 indicates that walking/hiking (46%), visiting an attraction (44%) eating out (42%) were the most popular activities undertaken by all visitors to Malvern Hills District. *However, again please*

note that the majority of interviews were undertaken at tourist attractions and in town centres and may result in some bias within the results.



All other activities undertaken by the different markets whilst on their visit to Malvern Hills District, mirror the top four responses of the main activity undertaken by visitors. Eating out was highest for domestic overnight (53%) compared with only 33% of overseas visitors. Visiting a specific event was highest amongst domestic overnight visitors than any other market (25%).

Table 33: All Activities Undertaken by Type of Visitor

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
Walking & Hiking	46%	39%	62%	57%	83%
Visiting an attraction	44%	48%	40%	31%	33%
Eating out	42%	40%	38%	53%	33%
General sightseeing	28%	22%	40%	39%	50%
Shopping/looking around shops	25%	21%	24%	35%	50%
Visiting specific event	10%	5%	5%	25%	17%
VFR	9%	4%	14%	18%	50%
Visiting historic/heritage site	9%	8%	14%	10%	17%
Other	7%	8%	12%	4%	-
Leisure cycling	3%	1%	10%	5%	-
Visiting theatre/cinema	2%	1%	-	5%	17%
Watching performing arts	1%	-	-	4%	-
Watching sport	0%	-	-	2%	-

NB: Other activities included visiting on business, dog walking, Swimming and using the library.

New visitors on a first trip to Malvern Hills District cited walking/hiking as the top activity undertaken (66% compared with 42% of repeat visitors).

Table 34: All Activities undertaken by New and Repeat Visitors

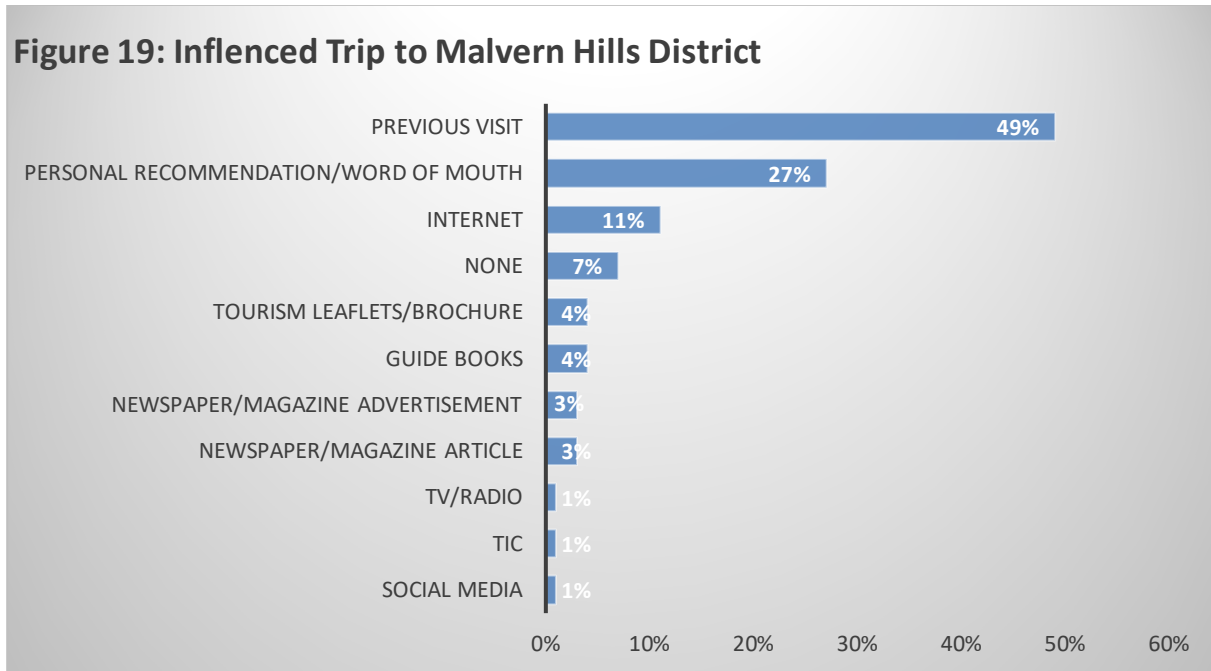
	Total	New	Repeat
Walking & Hiking	46%	66%	42%
Visiting an attraction	44%	36%	45%
Eating out	42%	58%	39%
General sightseeing	28%	37%	26%
Shopping/looking around shops	25%	22%	26%
Visiting specific event	10%	10%	10%
VFR	9%	13%	8%
Visiting historic/heritage site	9%	9%	9%
Other	7%	4%	8%
Leisure cycling	3%	3%	3%
Visiting theatre/cinema	2%	1%	3%
Watching performing arts	1%	-	1%
Watching sport	1%	1%	-

Repeat visitors were more likely to visit an attraction (45%) and shop/look around shops (26%) compared with 22% and 36% of first time visitors. Similar levels of both new and repeat visitors cited visiting an historic/heritage site whilst on their visit to Malvern Hills District (9% respectively).

13.0 PRE-TRIP SOURCES OF INFORMATION

13.1 Influenced Trip to Malvern Hills District

Survey respondents were shown a show card, and asked if any of the following had influenced their decision to visit Malvern Hills District



Almost half (49%) of all respondents stated a previous visit had encouraged them to return to the area. An additional 27% stated a personal recommendation / word of mouth and 11% stated the Internet had influenced their choice to visit.

Almost all visitors to Malvern Hills District (93%) had been influenced by some form of information when planning their trip, only 7% had not.

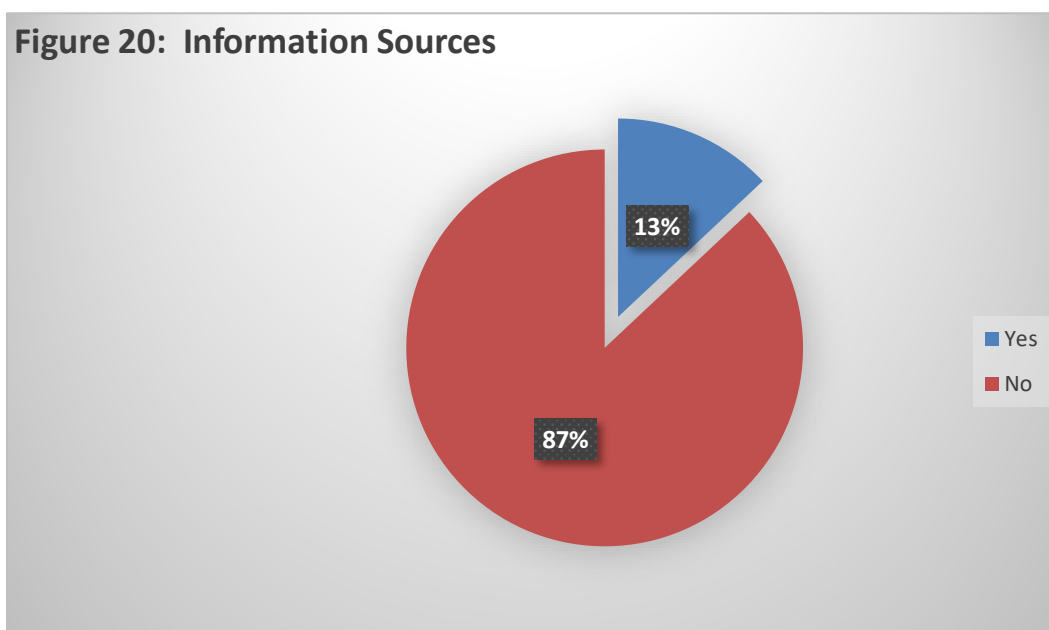
A previous visit (58%) and personal recommendations were primary influences stated by new and repeat visitors.

Personal recommendation was highest amongst the overseas market (83%) and domestic touring and overnight market (31% respectively). Only 8% of day visitors had been influenced by the internet compared with over a quarter (26%) of domestic touring visitors. However, the high proportion of repeat day visitors is borne out by 54% citing a previous visit as the main influence on their trip. Domestic touring visitors were the least likely to be influenced by any form of advertising, with over 12% stating that nothing had influenced their visit to Malvern Hills District.

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
Previous visit	49%	54%	26%	48%	17%
Personal recommendation /Word of mouth	27%	25%	31%	31%	83%
Internet	11%	8%	26%	10%	-
None	7%	5%	12%	9%	-
Tourism leaflets/brochures	4%	5%	2%	2%	-
Guide books	4%	4%	10%	-	-
Newspaper/magazine advertisement	3%	4%	-	2%	-
Newspaper/magazine article	3%	4%	-	-	-
TV/Radio	1%	1%	-	1%	-
TIC	1%	1%	5%	-	-
Social media	1%	-	-	3%	-

13.2 Sources of Information

Respondents were asked if they had already used or intended to use any sources of information having arrived in Malvern Hills District. Overall, 87% of visitors indicated that they had not used, or did not intend to use information during their trip:



Of those that had or intended to use information, 42% of all visitors and 45% of new and 39% of repeat visitors had used the Tourist Information Centre to source information on their trip. The

changing face of how information is accessed both before and during a visit can be seen with 10% of new visitors sourcing information by smartphone/internet.

Table 36: Information Used by New and Repeat Visitors

	Total	New	Repeat
TIC	42%	45%	39%
Information racks at attractions	21%	30%	15%
Walking guides/maps	17%	10%	21%
Other	17%	10%	21%
Brochure/racks at accommodation	6%	15%	-
Smartphone/Internet	6%	10%	3%
Advice at accommodation	4%	10%	-
Tourist information points/Kiosk	4%	-	6%
Tourist information boards	1%	-	3%
Social media (Facebook/Twitter)	-	-	-

Table 37: Information Used by Type of Visitor

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
TIC	42%	20%	30%	70%	33%
Information racks at attractions	21%	30%	30%	5%	33%
Walking guides/maps	17%	30%	10%	10%	-
Other	17%	25%	10%	10%	33%
Brochure/racks at accommodation	6%	-	10%	10%	-
Smartphone/Internet	6%	-	10%	10%	-
Advice at accommodation	4%	-	10%	5%	-
Tourist information points/Kiosk	4%	5%	-	5%	-
Tourist information boards	2%	5%	-	-	-
Social media (Facebook/Twitter)	-	-	-	-	-

Use of the TIC once in Malvern Hills District was high across the overnight and touring markets. Day visitors made less use of the TIC than any other market (20%). In general, day visitors made more use of walking guides/maps and all sources of information than any other market.

14.0 MOVEMENT AROUND THE AREA

14.1 Areas within the County have or intend to visit by type of visitor

Visitors were asked to identify where else they had visited in the county during their trip. With Malvern Hills District incorporating three towns, visitors interviewed at the different locations on the day of interview, indicated that they would be visiting other towns in the district during their trip, i.e. those interviewed in Upton-on-Severn, indicated that they would also be visiting Malvern town and vice versa. Malvern was top with 37% of visitors stating they had or intended to visit the town. Just over a third (35%) of all visitors interviewed in the district did not intend to visit any other town on this trip.

	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitor
Malvern	37%	32%	40%	47%	83%
None	35%	44%	33%	12%	-
Worcester	12%	9%	21%	16%	33%
Upton-on-Severn	14%	6%	7%	40%	-
Tenbury	14%	17%	10%	9%	-
Stourport-on-Severn	3%	2%	5%	3%	-
Evesham	3%	2%	2%	4%	17%
Pershore	3%	2%	7%	5%	17%
Broadway	2%	1%	7%	1%	17%
Bewdley	2%	3%	2%	1%	-
Kidderminster	2%	2%	5%	2%	-
Redditch	1%	1%	-	-	-
Droitwich	1%	1%	-	3%	-
Bromsgrove	1%	2%	-	-	-
Other	0%	-	2%	-	-

NB: Tables may add up to more than 100% due to multiple answers given

As Table 38 above illustrates, Visitors to Malvern Hills District were more likely to visit other areas within the district with high levels of visitors to Malvern across all markets. Day visitors to the district were less likely to visit any other towns than domestic and overseas visitors (44%).

Table 39 illustrates strong patterns of movement in the county, for example, of the visitors interviewed in Malvern, 36% had or intended to visit Worcester; similarly, of those visitors interviewed in Worcester 14% had or intended to visit Malvern. This pattern continued elsewhere in the county, of those visitors interviewed in Bewdley, 32% had or intended to visit Kidderminster, and of those interviewed in Bromsgrove, 20% had or intended to visit Worcester.

Table 39: Towns/villages visited or intend to visit													
	Worcester	Malvern	Stourport-on-Severn	Evesham	Droitwich Spa	Broadway	Pershore	Bromsgrove	Redditch	Bewdley	Tenbury	Upton-on-Severn	Kidderminster
Worcester	n/a	14%	5%	8%	4%	5%	5%	4%	4%	4%	3%	6%	6%
Malvern	36%	n/a	9%	14%	8%	11%	8%	10%	9%	9%	6%	14%	11%
Stourport-on-Severn	31%	22%	n/a	17%	17%	12%	13%	15%	16%	31%	15%	18%	25%
Evesham	29%	20%	10%	n/a	9%	24%	22%	12%	13%	10%	8%	12%	14%
Droitwich Spa	33%	23%	20%	19%	n/a	17%	20%	17%	20%	19%	13%	17%	21%
Broadway	24%	19%	8%	29%	10%	n/a	15%	13%	10%	8%	6%	9%	12%
Pershore	24%	15%	10%	29%	12%	16%	n/a	10%	10%	9%	8%	15%	11%
Bromsgrove	20%	17%	10%	15%	10%	13%	9%	n/a	17%	10%	8%	10%	13%
Redditch	10%	9%	6%	9%	7%	6%	5%	10%	n/a	7%	4%	5%	8%
Bewdley	29%	22%	32%	17%	16%	11%	12%	15%	17%	n/a	15%	12%	32%
Tenbury	22%	17%	17%	16%	13%	10%	13%	15%	13%	17%	n/a	16%	17%
Upton-on-Severn	42%	38%	20%	23%	16%	15%	23%	16%	15%	14%	15%	n/a	14%
Kidderminster	34%	25%	22%	21%	16%	15%	13%	16%	18%	28%	13%	11%	n/a

15.0 KNOWLEDGE OF / VISITS TO ATTRACTIONS AND RATINGS OF SERVICE

15.1 Local awareness and visitation

Visitors who indicated they had visited an attraction as an activity were asked to indicate which attractions they had or intended to visit. The full breakdown is shown in the table below.

	Have visited	Will visit	Rating
Arley Arboretum	1%	-	3.50
Avoncroft Museum	1%	-	5.00
Bewdley Museum	0%	-	4.00
Bodenham Arboretum	-	-	-
Broadway (general)	0%	0%	5.00
Malvern Hills	20%	6%	4.84
Croome Landscape Pak	1%	1%	4.60
Elgar's Birthplace Museum	0%	1%	5.00
Go Ape	-	0%	-
Hanbury Hall	0%	1%	5.00
Harvington Hall	0%	-	-
Jinney Ring Craft Centre	0%	-	4.00
Kidderminster Museum of Carpet	0%	-	4.00
Redditch attractions	0%	-	4.00
Royal Worcester Museum	0%	-	4.00
Severn Valley Railway	1%	-	5.00
Stone Cottage Gardens	-	-	-
Tenbury Wells High St/ pump rooms and TIC	0%	0%	4.50
The Regal Cinema Tenbury	0%	-	5.00
The Three Counties Showground	-	1%	-
The Commandery	-	0%	-
Webbs of Wychbold	-	-	-
West Midlands Safari Park	0%	-	4.00
Witley Court	0%	1%	4.71
Worcester Cathedral	2%	2%	4.75
Worcester City Art Gallery & Museum	0%	-	4.00
Wyre Forest Visitor Centre	-	0%	-
Wythall Transport Museum	0%	-	-

All results exclude visitors interviewed at the named attraction, to reduce bias from their current trip. The results illustrate the importance of advance marketing, public relations and marketing within Malvern Hills District in order to raise the awareness and visitation to the attractions. Over half of all visitors did not intend to visit any other attraction than the one they were interviewed at.

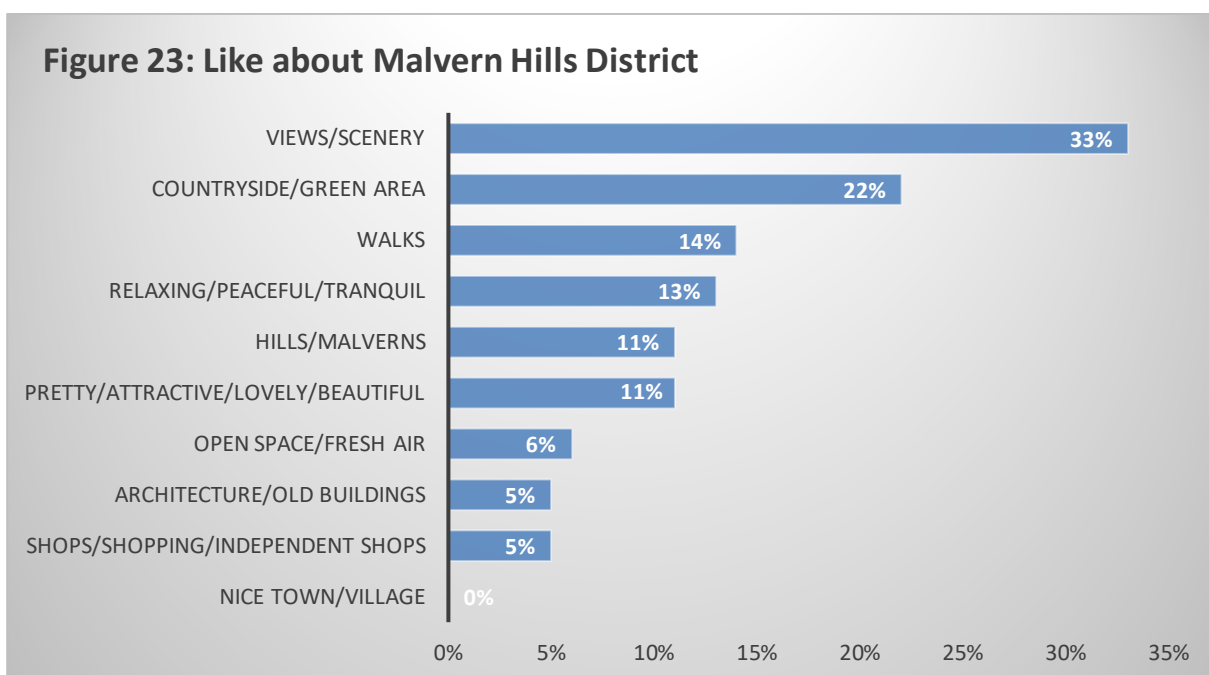
An additional 2% intended to visit Worcester Cathedral and 6% would be making a visit to Malvern Hills. However, please note that the visitors response maybe influenced by location of interview.

16.0 SATISFACTION LEVELS OF VISITORS TO MALVERN HILLS DISTRICT

16.1 What visitors like about Malvern Hills District

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

Across Malvern Hills District, comments were made by the majority of visitors. The following analysis is of the responses made as a percentage of the total visitors' sample. Each 'like' indicates a grouping together of responses/phrases.



Most of the top responses by visitors to Malvern Hills District related to the beautiful scenery and countryside. A third of all visitors (33%) liked the views/scenery followed by 22% who mentioned the countryside/green/rural area. The walks (14%), the relaxing/peaceful and tranquil nature of the area (13%) and the Malvern Hills and beautiful area was noted by 11% of visitors respectively.

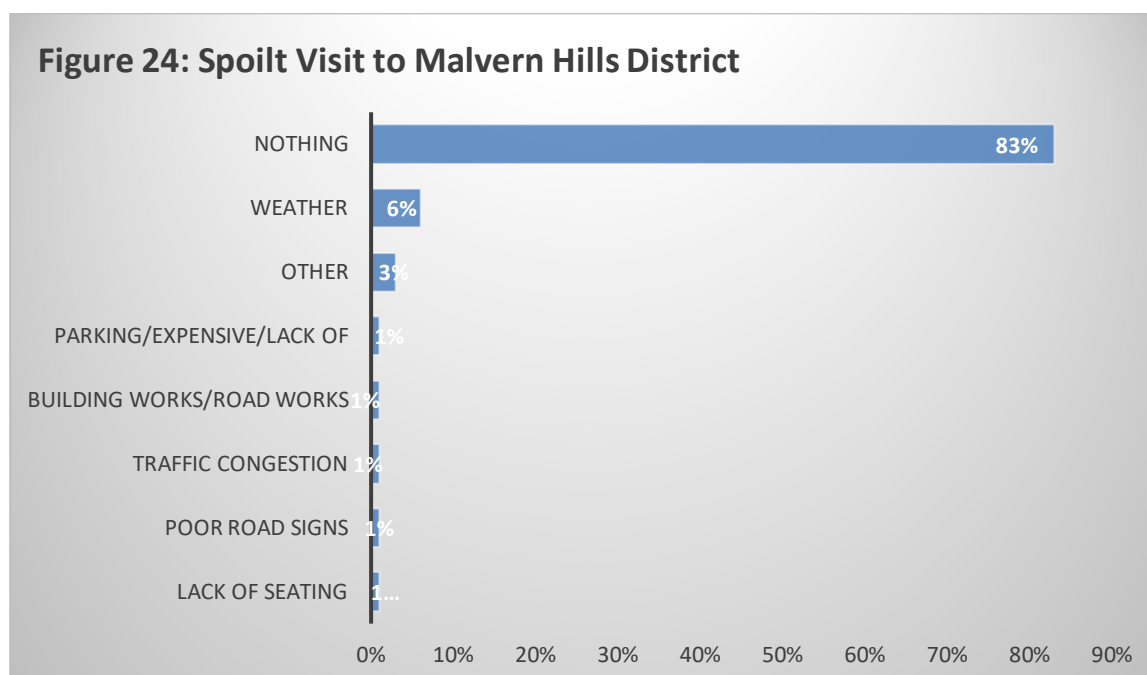
Domestic touring visitors most liked the views/scenery (40%) as did 34% of day visitors and 27% of domestic overnight visitors. The relaxing/peaceful/tranquil area was noted by 18% of overnight visitors from the UK, higher than both the other two domestic markets.

Generally, across all markets, the most liked aspects of Malvern Hills District relate to the natural landscape throughout the district.

Base	Total	Day Visitor	Touring UK	Overnight UK	Overseas
Views/scenery	33%	34%	40%	27%	50%
Countryside/green area	22%	22%	26%	16%	50%
Walks	14%	14%	17%	13%	33%
Relaxing/peaceful/tranquil	13%	12%	12%	18%	-
Hills/Malvern's	11%	9%	12%	18%	-
Pretty/attractive/lovely/beautiful	11%	10%	10%	14%	17%
Open space/fresh air	6%	7%	-	5%	17%
Architecture/old buildings	5%	5%	7%	3%	-
Shops/shopping/independent shops	5%	5%	-	8%	-
Nice town/village	5%	5%	-	7%	-

16.2 What spoilt visit to Malvern Hills District?

All visitors were asked what, if anything had spoilt their visit to Malvern Hills District. Overall, 36% of visitors did not respond. Of those who did provide a response, 83% indicated that nothing had spoilt their visit to Malvern Hills District.



Of the small amount of comments that were made, 6% related to weather and 3% gave other reasons including; smell of fish and chips, bad drivers, too many hills and shooting pheasants.

Base	Total	Day Visitor	Touring UK	Overnight UK	Overseas Visitors
No / Nothing	83%	88%	63%	75%	100%
Weather	6%	3%	19%	8%	-
Other	3%	3%	7%	3%	-
Parking/expensive/lack of	1%	2%	-	-	-
Building works/road works	1%	-	4%	3%	-
Traffic congestion	1%	1%	4%	-	-
Poor road signs	1%	1%	-	2%	-
Lack of seating	1%	1%	4%	-	-

Across all the markets, there were very few visitors who commented on anything that had spoilt their visit. Day visitors were less affected by the inclement weather than both touring and staying visitors (19% and 8% respectively).

Public expectations are rising all the time and any short comings in the way Malvern Hills District manages and welcomes the visitors are reflected in the level of visitor satisfaction, which in turn influences future visits, length of stay and recommendations to potential visitors. Therefore, the visitor scoring of facilities within individual towns and issues that spoiled a respondents' visit may help inform future tourism development initiatives.

In the case of new visitors, scoring could be influenced by preconceived ideas about an area, this may result in low scores if a destination does not live up to expectations.

17.0 EXPENDITURE

17.1 Visitor spending in the local economy

Visitors were asked to estimate how much they and their party were likely to spend during the whole period of their stay in Malvern Hills District. This included expenditure incurred on behalf of others, i.e. friends/relatives, business colleagues. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as estimates. Studies using the diary method of keeping account of spending have shown that visitors' own estimates as used in the Malvern Hills survey are usually on the conservative side. Visitors were asked to give a breakdown of their total expenditure according to the following categories:

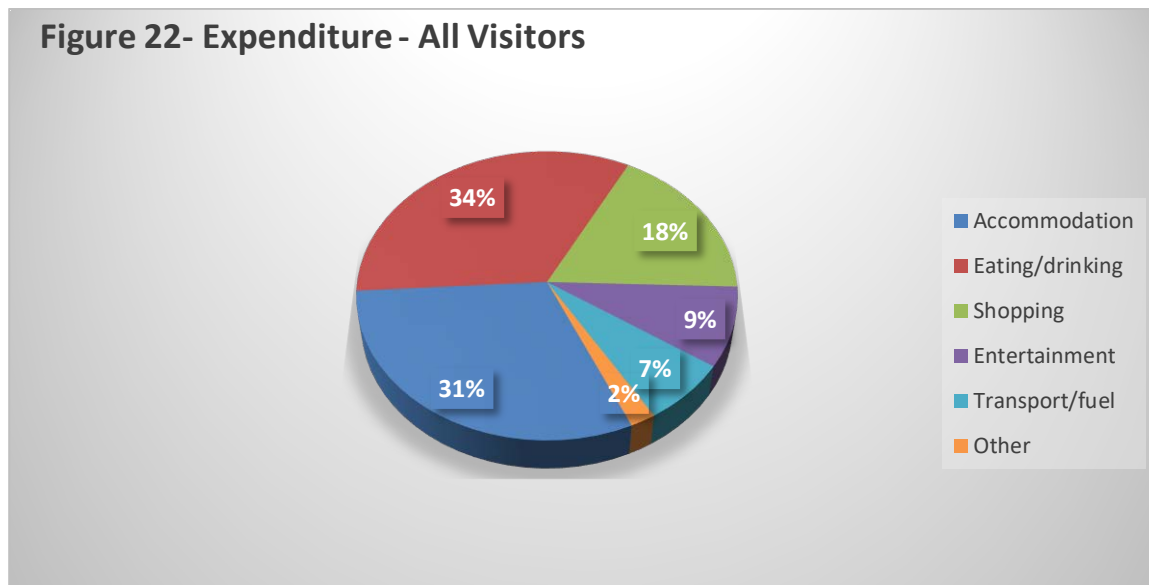
- * Accommodation
- * Eating/drinking out
- * Shopping for food
- * Shopping other goods
- * Entertainment
- * Transport/fuel
- * Other

The information on visitor expenditure in the local economy can be used as an indicator of the economic impact of all the visitors. The samples include those who indicated that they had or did not intend to spend anything, but exclude those who gave a "don't know" to the question. Table 43 shows the breakdown of all visitor segments' expenditure by sector:

Table 43: Expenditure - All Visitors	
	2016
Accommodation	31%
Eating & drinking	34%
Shopping	18%
Entertainment	9%
Travel & transport	7%
Other	2%

The average spend for all visitors to Malvern Hills District is £100.75 per party per trip. With an average party size of 3.1, the expenditure rate per person is £32.90 per day

Table 44 and figure 22 show that visitor spending in Malvern Hills District is split between eating and drinking (34%), accommodation (31%) and shopping (18%).

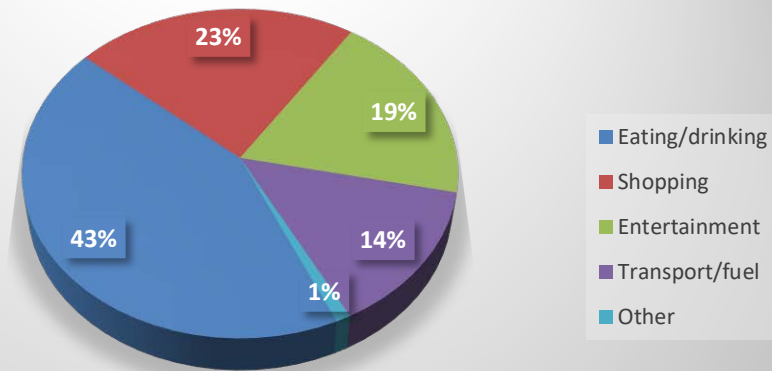


The figures on the following pages illustrate each market segment's proportions and levels of expenditure. The figures are based on all visitors' expenditure across the whole of Malvern Hills District.

17.2 Day Visitors

On average, a party of day visitors in Malvern Hills District spent £42.90. With an average day visiting party size of 3.1 people, the average expenditure rate per person is £13.93 during the day.

Figure 23- Expenditure - Day Visitors



Category	Percentage
Eating & drinking	43%
Shopping	23%
Entertainment	19%
Travel & transport	14%
Other	1%

The 2015 Leisure Day Visits Survey, indicates that the average spend per group per day is approximately £30.18 for the region. Therefore, Malvern Hills District receives above average the regional spend per group.

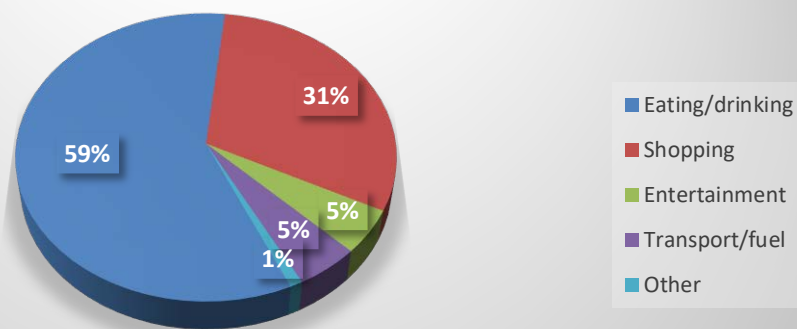
17.3 Touring UK Visitors

An approximate level of spend can be seen amongst the touring party sample with an average party size of 2.4 people. A total of £62.48 was spent per party or £25.98 per head. *These figures include those people visiting Malvern Hills District as part of a coach trip or tour.*

This is usually a higher figure than for day visitors as this touring segment comprises visitors making a day trip into the area from an alternative place of overnight stay outside of Malvern Hills District on a holiday/ leisure/ break with friends and relations, etc.

Generally touring visitors have a different spending breakdown to day visitors, with more of the touring spend going on eating and drinking and sometimes a lower proportion spent on shopping as is the case in Malvern Hills District. The distribution of touring visitors' expenditure is as follows.

Figure 24- Expenditure - Touring Visitors



Category	Percentage
Eating & drinking	59%
Shopping	31%
Entertainment	5%
Travel & transport	5%
Other	1%

17.4 Overnight UK Visitors

Domestic staying visitors are those people who are on their holiday or short break and staying within Malvern Hills District.

An approximate level of spend can be seen amongst the overnight party sample, staying for less than 2 months based on all visitor using both commercial accommodation and staying with friends and relatives. This equates to an average party size of 3.3 people. A total of £243.59 was spent per party or £74.52 per head per trip

Figure 25- Expenditure - Overnight UK

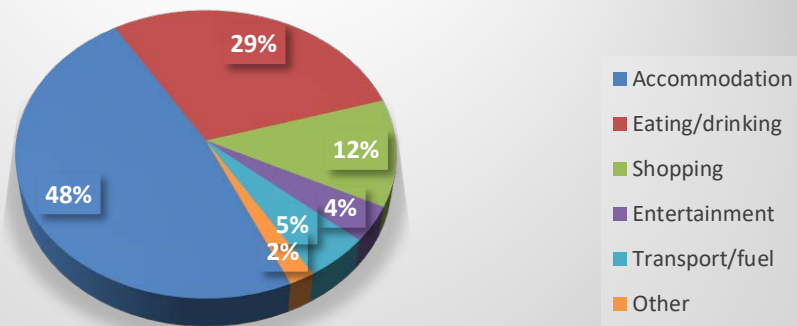


Table 46: Expenditure – Overnight UK

Accommodation	48%
Eating & drinking	29%
Shopping	12%
Entertainment	4%
Travel & transport	5%
Other	2%

17.5 Overseas Visitors

A total of 6 overseas visitors, including those staying with friends and family provided details of how much they spent in Malvern Hills District. The figures below again provide only an indication of how overseas staying spend compares with that of domestic visitors based on a relatively small sample.

The spend estimated for all overnight overseas visitors is calculated to be £474.33 per party. With an average party size of 3.7 people, £129.36 was spent per head per overnight trip by overseas visitors.

Thus, in summary, the differing levels of spend per market segment are:

Total Spend All Visitors	£32.90 Per Person Per Day
UK Day Visitor	£13.93 Per Person Per Day
UK Touring (staying outside of the district)	£25.98 Per Person Per Day
UK Overnight - ALL	£74.52 Per Person Per Trip
Overseas - ALL	£129.36 Per Person Per Trip

Appendix 1

Origin of visitor - Day Visitor	
Base	278
County	
Worcestershire	36%
West Midlands	29%
Gloucestershire	9%
Herefordshire	5%
Shropshire	4%
Warwickshire	3%
Derbyshire	1%
Staffordshire	1%
London / Middlesex	1%
Bath / Bristol	1%
South Wales	1%
Manchester	1%
Leicestershire	1%
Northamptonshire	1%
Nottinghamshire	1%
Berkshire	1%
Oxfordshire	1%
Wiltshire	1%
Yorkshire west	0%
Cambridgeshire	0%
Norfolk	0%
Buckinghamshire	0%
Bedfordshire	0%
Cornwall	0%

Origin of visitor - Touring UK Visitor	
Base	48
County	
West Midlands	12%
Cheshire	7%
Surrey	7%
Lancashire	5%
Cambridgeshire	5%
London / Middlesex	5%
Hertfordshire	5%
Devon	5%
South Wales	5%
North Wales	5%
Durham	2%
Manchester	2%
Yorkshire south	2%
Northamptonshire	2%
Gloucestershire	2%
Worcestershire	2%
Shropshire	2%
Warwickshire	2%
Essex	2%
Norfolk	2%
Kent	2%
Berkshire	2%
Buckinghamshire	2%
Hants / Isle of Wight	2%
Bath / Bristol	2%
Dorset west & south	2%
Somerset	2%

Origin of visitor - Overnight UK Visitor	
Base	93
County	
West Midlands	24%
Worcestershire	8%
Surrey	5%
South Wales	5%
Gloucestershire	4%
London / Middlesex	4%
Manchester	3%
Leicestershire	3%
Warwickshire	3%
Kent	3%
Berkshire	3%
Bath / Bristol	3%
Tyne & Wear	2%
Yorkshire south	2%
Herefordshire	2%
Sussex east	2%
Oxfordshire	2%
Devon	2%
Durham	1%
Lancashire	1%
Yorkshire west	1%
Derbyshire	1%
Northamptonshire	1%
Nottinghamshire	1%
Shropshire	1%
Essex	1%
Norfolk	1%
Suffolk	1%
Buckinghamshire	1%
Hertfordshire	1%
Cornwall	1%
Somerset	1%
Wiltshire	1%
Powys	1%

APPENDIX 2

Like about Malvern Hills by Type of Visitor and New/Repeat

Break %	Total	Type of Visitor				New/Repeat	
Respondents		Day Visitor	Touring UK	Overnight UK	Overseas Visitor	New	Repeat
Base	416	275	43	91	7	66	350
Views/scenery	33%	34%	42%	27%	43%	39%	32%
Countryside/green area	22%	23%	26%	16%	43%	12%	24%
Walks	14%	14%	16%	13%	29%	12%	15%
Relaxing/peaceful/tranquil	13%	12%	12%	18%	-	12%	13%
Hills/Malvern's	11%	9%	12%	18%	-	17%	10%
Pretty/attractive/lovely/beautiful	11%	9%	9%	14%	29%	15%	10%
Open space/fresh air	6%	7%	-	5%	14%	5%	6%
Architecture/Old Buildings	5%	5%	7%	3%	-	9%	4%
Shops/Shopping/Independent shops	5%	5%	-	8%	-	3%	5%
Nice town/village	5%	5%	-	7%	-	5%	5%
Friendly people	5%	4%	5%	7%	-	3%	5%
Things to see and do/attractions	5%	5%	-	3%	14%	2%	5%
Good for children/children's activities	4%	6%	-	2%	-	2%	5%
History/Historical/heritage	4%	3%	9%	4%	-	8%	3%
Clean and tidy	4%	4%	2%	4%	14%	5%	4%
Places to eat and drink	4%	5%	-	2%	-	2%	4%
Accessible/easy to get to/good road and rail links	3%	3%	2%	2%	14%	3%	3%
Great day out	3%	4%	2%	-	-	5%	3%
Parks/gardens	3%	3%	5%	1%	-	2%	3%
Theatre/Huntingdon Hall	3%	3%	2%	1%	-	2%	3%
Rural mix	2%	3%	2%	2%	-	3%	2%
Easy to walk around	2%	3%	-	1%	-	2%	2%
Atmosphere	2%	1%	-	7%	-	3%	2%
Floral display/flowers/trees	2%	2%	-	1%	14%	-	2%
Everything/all of it	2%	2%	-	2%	-	2%	2%
Croome	2%	1%	7%	-	-	5%	1%
Events/festivals	1%	2%	-	1%	-	-	2%
Swans by river/wildlife/ducks	1%	2%	-	1%	-	-	2%
The River	1%	0%	-	4%	-	2%	1%
Nostalgia	1%	1%	-	3%	-	-	1%
Lots of seating/benches	1%	1%	-	-	-	-	1%
Pubs/Bars	1%	1%	-	1%	-	2%	1%
No traffic/traffic free/no congestion	0%	1%	-	-	-	-	1%
Family/friends here	0%	-	2%	1%	-	-	1%
Ambience	0%	-	-	1%	-	-	0%
Museums	0%	0%	-	-	-	-	0%
TIC	0%	0%	-	-	-	-	0%
Interesting	0%	0%	-	-	-	-	0%
City Centre Markets/markets	0%	0%	-	-	-	-	0%
Boat trips	0%	0%	-	-	-	-	0%
Culture	0%	-	-	1%	-	-	0%
Olde Worlde/Quaint	0%	-	-	1%	-	-	0%
Nothing in particular	0%	0%	-	-	-	-	0%
Other	0%	0%	-	-	-	-	0%

What, if anything, spoilt your visit to Malvern Hills?							
Break %	Total	Type of Visitor				New/Repeat	
Respondents		Day Visitor	Touring UK	Overnight UK	Overseas Visitor	New	Repeat
Base	270	180	28	60	2	37	233
Nothing	83%	88%	64%	75%	100%	73%	84%
Weather	6%	3%	18%	8%	-	11%	5%
other	3%	3%	7%	3%	-	8%	3%
Parking/expensive/lack of	1%	2%	-	-	-	-	1%
Building works/road works - building works only apply to Worcester) road works to all	1%	-	4%	3%	-	3%	1%
Traffic congestion	1%	1%	4%	-	-	-	1%
Witley - cafe too far away could do with a kiosk nearer	1%	2%	-	-	-	-	1%
Poor road signs	1%	1%	-	2%	-	3%	0%
Lack of seating (by river only in some places)	1%	1%	4%	-	-	-	1%
Toilets/poor/need more about town/quality	0%	1%	-	-	-	-	0%
Shabby/run down	0%	-	-	2%	-	-	0%
Lack of places open on a Sunday	0%	-	-	2%	-	3%	-
Do not want cable car on Beacon	0%	-	-	2%	-	-	0%
Poor public transport	0%	-	-	2%	-	-	0%
Croome - lack of items in house	0%	1%	-	-	-	-	0%
Gypsies	0%	-	-	2%	-	-	0%