



Shropshire Borderlands Visitor Survey Research Report

For Shropshire Council

November 2013



RESEARCH

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This research has been carried out in compliance with the International standard ISO 20252

1. Introduction

Qa Research (Qa) is pleased to submit this research report to the Shropshire Council about visitors to the Shropshire Borderlands areas (northern Shropshire).

This research builds upon previous visitor research conducted in 2007 (then for North Shropshire District and Oswestry Borough). The term Northern Shropshire is used in the report to describe the area covered by the former district of North Shropshire and borough of Oswestry.

This report is based on the findings from the face to face quantitative visitor research undertaken from July to October 2013.

2. Aims and objectives

The overall aim of the research is to:

- Improve the knowledge base and refresh baseline data on visitors to the Shropshire Borderlands area.

With the specific aims of the research being to:

- Profile visitors, in terms of demographics, who they are visiting with, party size, transport used, type of visitor, frequency of visiting, accommodation used (for overnight visitors), duration and spend
- Identify motivations for visiting, sources of information used to prepare and plan and sources of information used during a visit and how booked
- Identify how the visitors travel around the area
- Understand awareness and usage of the area (e.g. frequency of visiting, activities undertaken and places heard of, intended to visit and actually visited during trip)
- Determine the level of visitor spend by type of expenditure (per person and per party per day/night) in order to support the economic modelling of the value of tourism
- Understand perceptions of the area in general
- Rate different aspects of a visit including overall satisfaction
- Profile those that visit Tourist Information Centres and establish reasons why or why not
- Measure the likelihood to return and also to recommend a visit to others (using a Net Promoter Score)
- Capture suggestions for changes or improvements to enhance the visitor experience

3. Methodology & sample

The visitor research was conducted using quantitative face to face interviews with a total of 432 surveys being completed.

The interviewing was conducted by Qa's own interview team using a set questionnaire (included in the appendix for reference).

Interviews were conducted at 17 different locations during peak and off-peak periods; with the number of interview shifts in each location agreed beforehand to ensure a broad mix of visitor types and geographic spread across the north Shropshire and Oswestry area.

The final sample comprises 54% of respondents who were interviewed in locations within North Shropshire District and 46% who were interviewed in locations in Oswestry. Two interview sites were included in Oswestry that are less than 1 mile outside the Shropshire border but a key part of Oswestry's tourism offer

Peak periods were defined as the school summer holidays and off-peak September and October (including the half-term week).

Location	Peak shifts	Peak completed surveys	Off-peak shifts	Off-peak completed surveys
Oswestry locations	5	77	7	122
Oswestry Town Centre	1	17	1	15
Park Hall Farm	0	0	2	40
Chirk Castle	1	20	1	16
Whittington Castle	0	0	1	15
Moreton Garden Centre	1	17	1	16
Chirk Aqueduct	1	18	1	20
Mile End TIC	1	5	0	0
North Shropshire locations	7	100	9	133
Ellesmere Canal	0	0	2	40
Market Drayton Canal	0	0	1	20
Hawkstone Park Follies	1	20	1	20
Whitchurch Town Centre	1	10	1	16
Whitchurch Grindley Brook	1	8	0	0
Market Drayton Town Centre	1	15	1	4
Ellesmere – Mere	1	20	1	12
Ellesmere Town Centre	0	0	2	21
Fordhall Organic Farm	1	7	0	0
Wem	1	20	0	0
Total	12	177	16	255

Using a map to highlight the relevant area, the first question on the survey asked how far visitors were into their visit to the Shropshire; with the survey 'thanking and closing' on anyone who was 'just at the beginning' and allowing those who were at least half way through to proceed and complete the survey thus ensuring they could evaluate the visitor experience.

Just over half said they were about half way through their visit to Shropshire (51%) and 49% were towards the end when they were interviewed.

The survey included day and overnight visitors, even if they live locally as long as they were visiting a place they visit less than once a week but excluded anyone on a regular shopping trip, visiting for work or business or who is a local resident visiting a place they visit regularly (i.e. once a week or more frequently).

Respondents were selected at random, with the next visitor being approached and asked to participate in the research as soon as the previous interview was completed.

Only one person per party was surveyed, if they were on a coach party then one person per group of friends/family was interviewed.

Surveys covered a mix of peak and off-peak periods (i.e. during and after the summer school holiday period) with interviews being conducted on a mix of weekends and weekdays.

59% of all surveys were completed in off-peak periods and 41% in peak times.

The 432 completions provide a sample which, in research terms, means we can be 95% confident that the data at an overall level has an error margin of no more than +/- 4.7%

Therefore these findings are based on a sample size which provides results that are within the +/- 5% standard industry error margin and therefore provide overall findings which are considered to be statistically robust.

Confidence levels:

This indicates how representative findings are of the resident body as a whole. A 95% confidence level refers to the statistical likelihood (probability) that the true value of the population lies within a range (95% confidence interval) of the estimated percentage.

The +/- 5% accuracy refers to the 'standard error', which demonstrates how answers provided by the sample group potentially vary from the responses that would be obtained if all respondents had been surveyed. In the research industry, commonly accepted levels of error are +/- 5%.

This means, for example, that if the observed statistic for any question is 50%, then if the research was repeated, this percentage will be no less than 45% and no more than 55%. The standard error is calculated on the basis of the total number of possible respondents covered and the number that have been covered by the survey.

Previous research

Visitor research had been conducted in 2007 in North Shropshire District Council and Oswestry Borough Council areas by another research agency, with fieldwork taking place between May and October.

The 2007 research involved in the North Shropshire District area comprised 27 interview shifts across nine different interview locations and achieved a sample size of 480. For Oswestry Borough 28 interview shifts were undertaken across seven locations, achieving a sample of 410.

Although the 2013 research was smaller in size, broadly the same locations were used.

We have analysed the 2013 data at an overall level and split by North Shropshire District and Oswestry against the previous 2007 data where the same questions have been asked. The comparative data has been shown in a table, with any statistically significant differences at an overall level as well as for each area being highlighted with the higher figure shaded in light blue.

4. Key findings

A note on analysis and how the data is presented in the report

The key findings from the research are shown overleaf.

Please note that when interpreting results throughout this report not all percentages will equal 100% due to rounding (with any figures of 0.5 or higher being rounded up).

Some questions were multiple response questions: respondents had the option of giving more than one response. These percentages may be higher than 100%.

The base (i.e. the number of people answering the question) is shown on each chart or table.

Where the figure is shown as 0% at least one respondent gave this answer but the total count makes up less than 0.5% of the overall total; a blank shows no-one has given this answer.

Please note that the base varies as some questions were only asked to some respondents depending on previous answers given.

Open ended verbatim questions (i.e. with no predefined responses) have been coded, grouped together and shown as percentages in the report.

The analysis of the results was run using Askia software. All questions have been cross-tabulated against the following variables with any relevant statistically significant differences which emerge being commented upon:

- Area interviewed within (Oswestry or North Shropshire District)
- Date of interview (i.e. Peak (end July – Aug) vs off peak (September and October))
- Day visitors versus overnight stayers
- Visited before: first time visitor vs repeat visitors (i.e. if been before in last 3 years) vs lapsed visitors
- Visiting with or without children in party
- Socio-economic group (ABCI vs C2DE)

Only cross tabulations that show a statistical significance are reported after the relevant question. Only category names alongside their proportions have been reported in a standard format and show where there is a statistically significant difference between categories.

For example, for words strongly associated with the area:

Peaceful:

- *North Shropshire District (76%) - Oswestry (52%)*
- *Staying overnight (81%) – day trip (56%)*
- *ABCI (70%) – C2DE (59%)*

This tells us that those who were interviewed in Northern Shropshire are significantly more likely to have said 'peaceful' than those interviewed in the Oswestry locations; 76% of all those interviewed in Northern Shropshire gave this answer compared to 52% of all those interviewed in the Oswestry area.

Those staying overnight and for ABCI socio-economic groups were also more likely to say 'peaceful', with 81% of all those staying overnight and 70% of all ABCIs giving this answer compare to 56% of all day visitors and 59% of all those who are C2DE.

The analysis shows there is a statistically significant difference between categories, how useful or actionable this is needs to be determined by the reader.

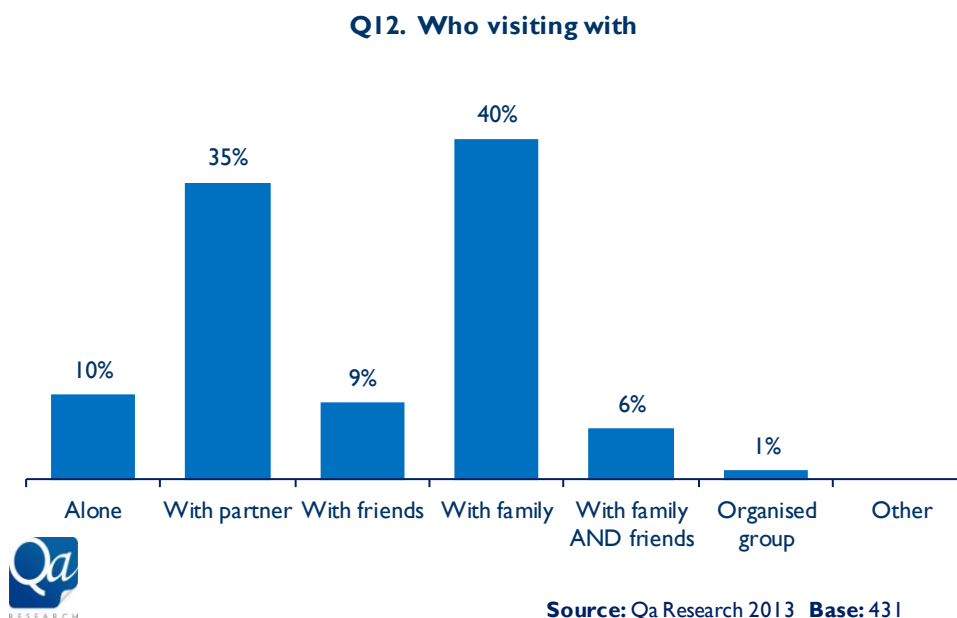
Comment:

Where we have added an observation, comment or interpretation about the findings in the report this has been done within a separate text box to differentiate our opinion from the numeric data.

4.1 Profile information

Who visiting with

Those surveyed were asked to select the single category which best described who they were visiting with.



The cross-tabulations highlight the profile of different visitor types:

Alone:

- Oswestry (13%) – North Shropshire District (7%)

Partner / spouse:

- Staying overnight (50%) – day trip (27%)
- North Shropshire District (42%) - Oswestry (26%)

Family:

- Day trip (43%) – staying overnight (32%)
- Oswestry (48%) – North Shropshire District (32%)

Friends:

- Day trip (12%) – staying overnight (2%)

The table overleaf compares the data for 2007 against 2013 at an overall level (i.e. combining the datasets for North Shropshire District and Oswestry), alongside a comparison of interviews conducted in Northern Shropshire in 2007 and 2013 and those conducted in Oswestry over the same time period.

The statistical analysis highlights differences between the overall data, the North Shropshire District data and the Oswestry data.

Who visiting with	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Alone	8%	10%	9%	7%	7%	13%
With partner	40%	35%	45%	42%	34%	26%
With friends	9%	9%	10%	11%	7%	7%
With family	38%	40%	30%	32%	47%	48%
Family and friends	4%	6%	5%	7%	3%	4%
Organised group	1%	1%	1%	1%	2%	2%
Other	8%	10%	9%	7%	7%	13%

Age and gender of visitors

Respondents were asked (Q29) about the age and gender of their party.

The findings below show the percentage of visitors (based on the overall total) who were from each age band.

Age bands	Overall	Male	Female
0-9	20%	9%	10%
10-14	5%	2%	3%
15-18	1%	0%	1%
19-24	2%	0%	2%
25-34	10%	3%	6%
35-44	11%	4%	7%
45-54	15%	6%	9%
55-64	17%	7%	10%
65+	20%	9%	11%
Base:	1180		

The total number of people per group ranged from 1 to 14 with the largest group comprising 2 adults and 14 children.

37% of respondents had one or more children in their party ranging from 1 to 12 children.

The mean group size was 2.74 individuals per group comprising 0.72 children (i.e. under 18), 1.48 adults (16-64) and 0.54 seniors (65+).

The mode (more frequent given party size) was 2 (48% of all visitors).

Amongst those visiting with children the mean group size was 3.89 (split 0.19 seniors, 1.75 adults and 1.94 children).

The mode (more frequent given party size for those visiting with children) was 3 (39% of all visitors with children), closely followed by 4 (31% of all visitors with children).

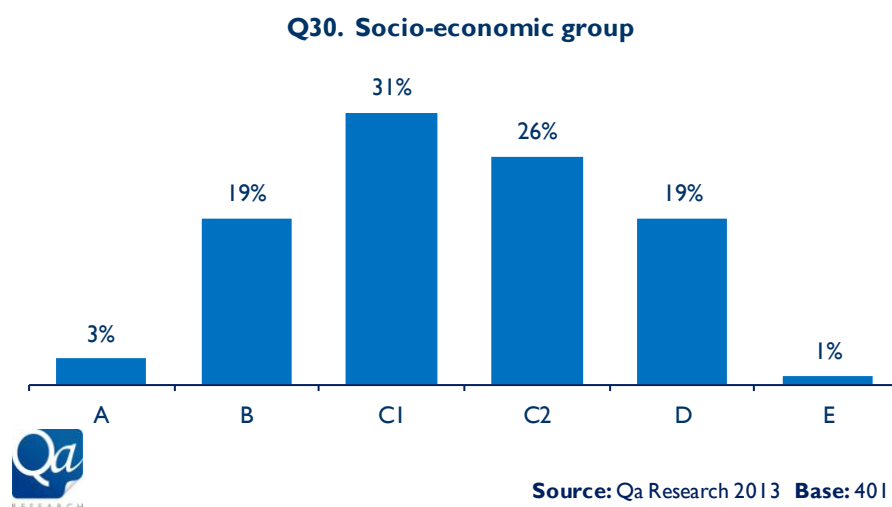
Socio-economic group of visitors

Visitors were asked to specify the occupation of the chief wage earner in their household. These occupations were coded against the standard occupation classification system (SOC) and are shown in the chart below.

A definition of each socio-economic group can be found in section 6.2 of the Appendix.

The findings are based on all those who gave a valid answer, excluding those who 'preferred not to say'.

The spread of visitors from socio-economic groups ABCI (53%) and C2DE (46%) is very similar to the UK average figures for the population as a whole¹.



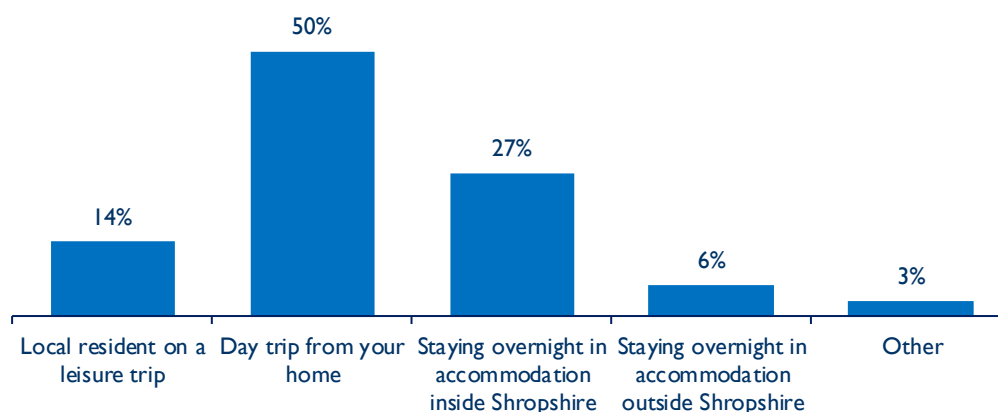
Day versus staying visitors

The second question gave respondents a range of descriptions and asked them which best described their visit on that day. Those saying either 'regular shopping trip', 'business trip / place of work' or 'local resident on a leisure trip, visiting a place I come to once a week or more' were not asked anymore questions so all subsequent answers (and all the findings in this report) are based on the views of actual visitors.

Therefore, 66% of respondents were day visitors and 34% staying overnight (with most of those staying inside Shropshire).

¹ <http://www.nomisweb.co.uk/census/2011/QS61IEW/view/2092957703?cols=measures>

Q2. Which describes your visit to Northern Shropshire today?



Source: Qa Research 2013 Base: 432 (all respondents)

Those saying 'other' gave their reasons as boat (5 respondents), wedding (3), Halloween event (2), motorhome (1) and called in at friends (1).

Local resident on a leisure trip:

- Off-peak (18%) – peak (8%)
- Oswestry (19%) – North Shropshire District (10%)

Day trip from home:

- Visiting with children (62%) – without (44%)

Staying overnight inside Shropshire:

- Peak (34%) – off-peak (22%)
- First time visitor (35%) – repeat (24%)
- Visiting without children (33%) – with (17%)
- North Shropshire District (33%) - Oswestry (20%)

Type of visitor	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Day trip	75%	66%	64%	60%	88%	72%
Staying overnight	25%	34%	36%	40%	12%	28%

Comment:

The research itself reveals no obvious reason for the big difference between the percentage of overnight visitors in Oswestry between 2007 and 2013. One possible explanation is an increase in overnight stays following the announcement of World Heritage status for Pontcysyllte Aqueduct and canal in 2009 plus the inclusion of an extra interview location within the WHS area in 2013.

Where visiting from

Respondents were asked to give their postcode, or country of residence if visiting from overseas (Q31).

The home locations of visitors amongst those who gave a country of origin or valid UK postcode (with some preferring not to say) have been matched to an English Heritage region and shown overleaf.

In total 98% of visitors were from the UK and 2% from overseas.

UK region	Overall	Day visitor	Staying visitor
East Midlands	3%	-	7%
East Of England	2%	0%	5%
London	1%	-	2%
North East	1%	0%	3%
North West	21%	18%	27%
South East	3%	-	10%
South West	2%	0%	5%
West Midlands	37%	46%	23%
Yorkshire & Humber	2%	1%	4%
Northern Ireland	0%	-	2%
Scotland	0%	-	2%
Wales	25%	33%	7%
Overseas	2%	1% ²	5%
Base	424	278	133

The 9 respondents (2% of the total) from overseas were from Australia (1), Germany (3), Ireland (1), Spain (1) and the USA (3).

Duration of day visit

Those on a day visit were asked how long they expected their visit to last today with answers ranging from 30 minutes to 12 hours.

The three most commonly given times were three hours (31% of all day visitors), four hours (18%) and two hours (9%).

Comment:

Although the area attracts a diverse range of visitors, the majority are older (47% being 55+), from ABC1 socio-economic groups, visiting without children and live in the UK.

² Three respondents gave their address as Germany but all said they were on a day trip – one was currently a student in Wales and the other two in the UK for some period for work.

The catchment area overnight visitors are being drawn from is very wide, suggesting the area has appeal for visitors from across England and Wales. However, this does mean it is difficult to geographically target communications via local or regional channels.

4.2 Visiting behaviour

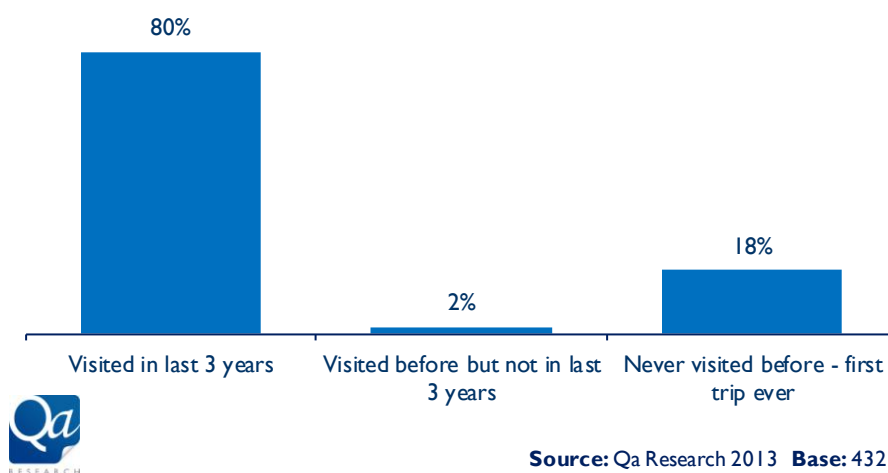
Previous visits

All respondents were shown a map of the relevant area and asked if this was their first ever visit to Northern Shropshire. Those who had visited before were then asked excluding today how many times have they visited Northern Shropshire in the last 3 years.

The answers to these two questions have been shown on the same chart.

The vast majority of visitors are recent rather than lapsed, with the area also attracting a proportion of new visitors.

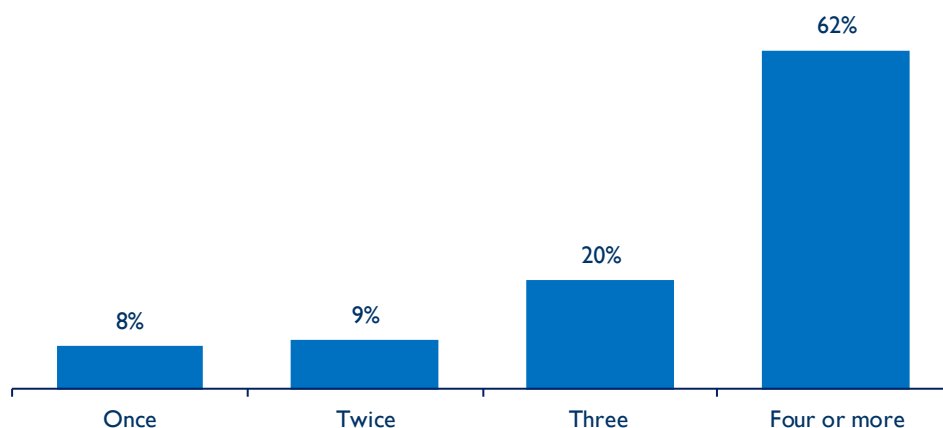
Q10 & 11. Have you visited Northern Shropshire before?



First trip ever to Northern Shropshire	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Yes	23%	18%	16%	17%	31%	20%
No	77%	82%	84%	83%	69%	80%

Respondents who had visited the area in the last 3 years were asked how many times excluding today that they had done so.

Q11. (Excluding today) number of times visited Northern Shropshire in last 3 years



Source: Qa Research 2013 Base: 345

Comment:

The proportion of repeat visitors is similar to many other destinations that have a relatively static market for example 74% of Welcome to Yorkshire's visitors have been before and 71% in the Shropshire Hills AONB³.

The high proportion of frequent repeat visitors suggests a high level of satisfaction with the visitor experience.

Positively the area is attracting a good proportion of first time visitors and local residents who are being tourists in their own backyard, whilst attracting back a high proportion of recent previous visitors.

Overnight accommodation

Staying visitors were asked how many nights in total they will be staying away from home during this visit (shown below on the light blue bar), with a mean number of 6.96⁴, although the majority were only staying for a few days (47% one to three nights).

Those staying overnight were shown a map of the area and also asked how many of these nights away would be spent in Northern Shropshire (shown in the dark blue bar), with a mean of 6.89⁵,

³ WtY figure an average from 2009-2011 Regional Visitor Survey and Shropshire Hills AONB form 2013 visitor research, both conducted by Qa

⁴ This figure includes some extreme numbers: one respondent said 21, two 28, one 30, one 31, one 40, one 42 and one 110 nights – the 4 respondents who said live on a boat have not been included in the figures.

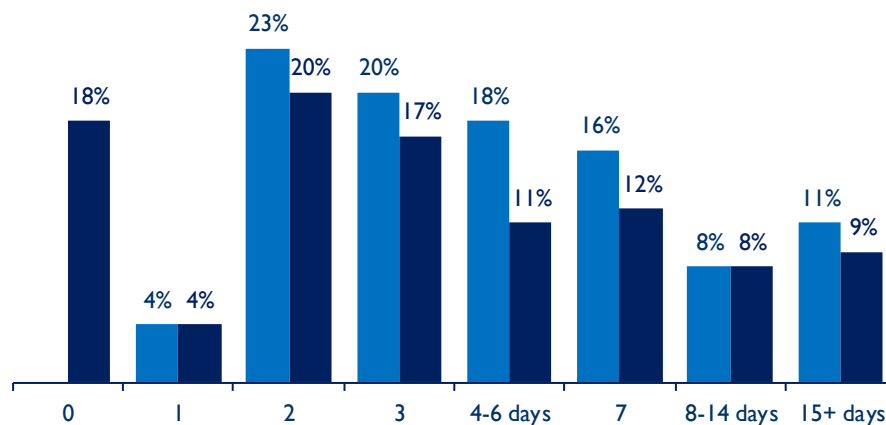
⁵ This figure includes some extreme numbers: one respondent said 21, two 28, one 30, one 31, one 40, one 42, two 90 and one 110 nights.



although the three most commonly cited answers were 2 nights (20%), 0 nights (18%) and 3 nights (17%).

Nearly a fifth (18%) of all overnight visitors are not staying inside Northern Shropshire.

Q3. Number of nights staying away from home



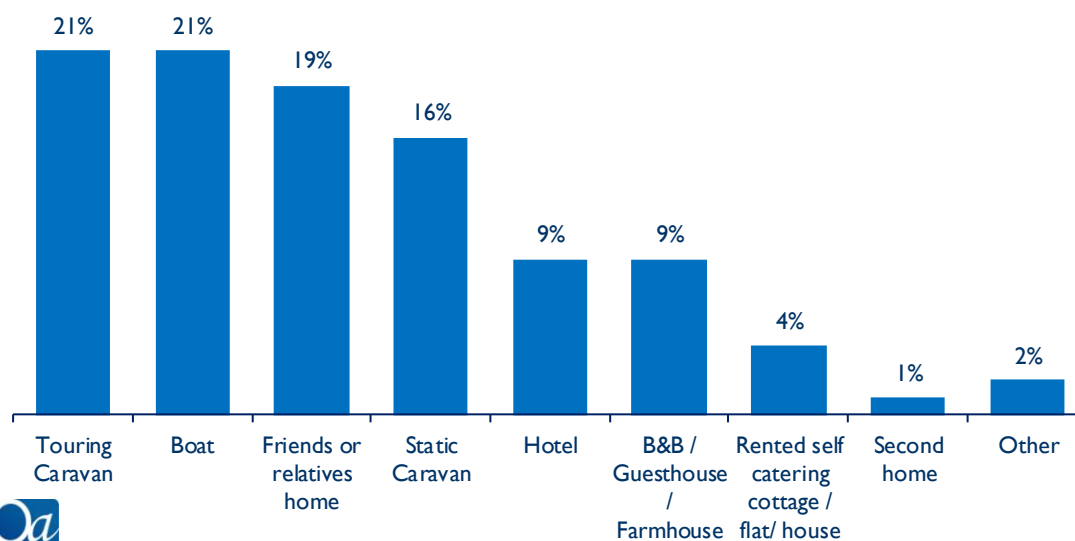
■ Nights away ■ Nights in Northern Shropshire

Source: Qa Research 2013 Base: 142

Accommodation choice

Only those staying overnight in Northern Shropshire were given a list of options and asked what type of accommodation they were staying in. The answers have been shown in ranked order from the most to least cited.

Q4. During stay in Northern Shropshire, what accommodation type are you staying in?



Source: Qa Research 2013 Base: 116



Comment:

The high percentage of people staying on boats may be over-represented because of interview locations which included several canal locations which was also true in 2007.

It is unclear why the percentage of caravanners (static and touring have gone up so much from the previous research).

In total 20% of all those staying overnight for one or more nights in the area were spending nothing on accommodation, predominately because they were staying with 'family or friends'.

Accommodation choice	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Hotel	6%	9%	2%	1%	20%	25%
B&B / Guesthouse / Farmhouse	2%	9%	3%	3%		20%
Touring Caravan	10%	21%	9%	24%	12%	15%
Rented self-catering cottage	3%	4%	3%	4%	2%	5%
Static Caravan	3%	16%	1%	24%	8%	
Boat	50%	21%	63%	29%	6%	5%
Friends or relatives home	21%	19%	15%	14%	44%	28%
Second home	0%	1%			2%	3%
Other	5%	2%	4%	1%	6%	3%

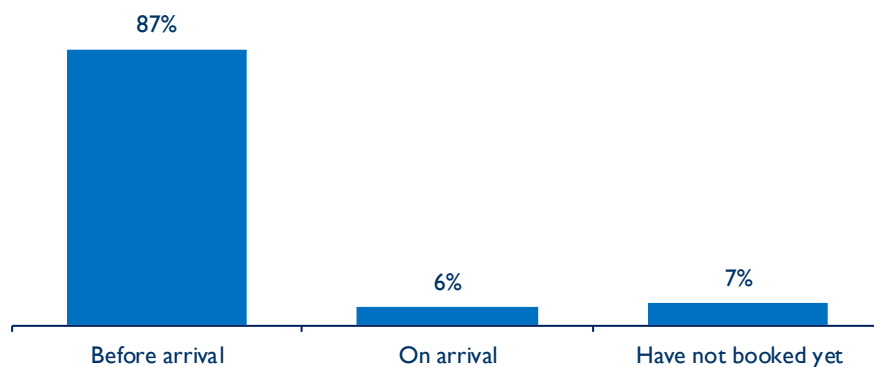
Comment:

The percentage of caravanners (static and touring) has gone up markedly from 2007. Interviews were carried out in Wem in 2013 but not 2007. There is a large caravan site just outside Wem town centre and this may account for some of the increase recorded.

Booking accommodation

Only those staying overnight in Northern Shropshire in paid for accommodation were asked additional questions about their accommodation booking, usage and spend⁶.

Q5. Did you book your accommodation before arriving in Shropshire or on arrival?



Source: Qa Research 2013 Base: 83

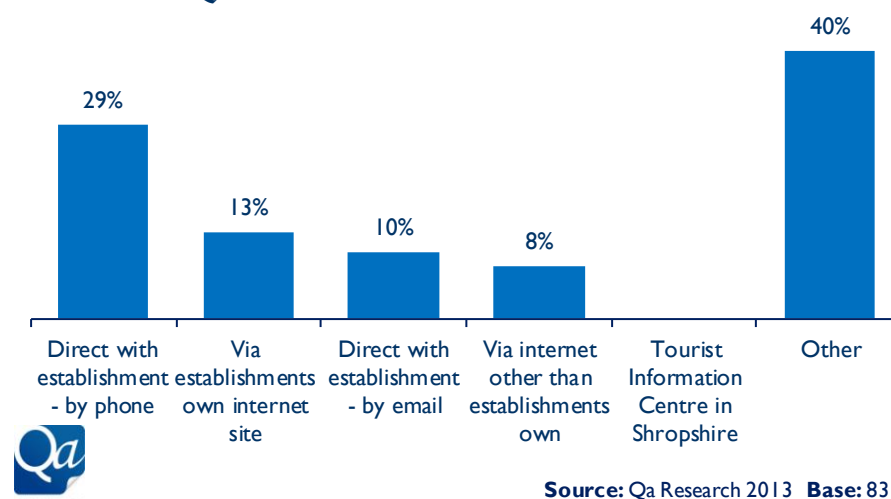
Before arrival:

- Peak (96%) – off-peak (74%)
- Oswestry (96%) – North Shropshire District (82%)

When book accommodation	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Before arrival	80%	87%	76%	82%	91%	96%
On arrival	2%	6%	1%	7%	4%	4%
Not booked yet	18%	7%	23%	11%	4%	

⁶ Nine respondents staying on a boat did not answer Q5 or Q6 as no need to book

Q6. Channel used to book accommodation



Those saying other tended to be staying in a caravan and booked through a caravan club or have a seasonal pitch or were on a boat and had no need to book a berth.

How book accommodation	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Direct - phone	37%	29%	38%	33%	35%	21%
Direct - email	6%	10%	5%	4%	9%	21%
TIC in Shropshire						
Via the internet ⁷	30%	22%	34%	9%	22%	46%
Other	27%	40%	23%	55%	35%	11%

Comment:

Most visitors staying overnight in the area have arranged accommodation before arriving and tend to do this directly with the provider themselves.

Accommodation providers need to offer a range of booking channels to optimise the bookings they receive rather than relying on the TICs to direct business to them.

It is unclear why booking via the internet has gone down since 2007, although the base sizes are very small (5 out of 55 respondents in Northern Shropshire in 2013, 19 out of 56 in 2007).

Can and should more be done by accommodation providers to be listed on other internet sites to help in attracting business?

⁷ The 2013 research separated out different internet channels but for these comparisons the internet options have been merged together as asked in the 2007 research.

Accommodation spend

Only those staying overnight in Shropshire in paid for accommodation were asked about the cost of this.

The average spend per party on accommodation for their whole trip (excluding those who said 'don't know' but including those who said £0) is £212.13 (or £84.14 per person per trip).

This equates to an average of £48.60 per group per night and £16.66 per person per night.

The figures above are an average and includes respondents who are staying in lower cost accommodation so the high proportion of caravanners who are paying very little and the boat owners who are mooring for free bring down the average figure.

Comment:

Those staying overnight in an area not only spend money locally on accommodation but also spend more per head during the day than the average day visitor (see figures later on). This pattern is seen in all research Qa has conducted for DMOs, National Parks and AONBs; staying visitors are considerably more valuable in terms of economic contribution to the local economy.

Attracting more overnight stays will help significantly boost the local visitor economy without adding considerably to footfall and congestion; therefore devising ways to increase the number of nights visitors spend staying within Shropshire during a visit is vital.

Rating accommodation provision

Respondents were asked to rate on a scale of 1 to 5, with 1 being very poor and 5 very good, different elements about the accommodation they have experienced in the area.

Q8 Ratings for accommodation	Very poor	Poor	Average	Good	Very good	Don't know
Range of accommodation in Shropshire			12%	13%	45%	30%
Quality of service in the establishment where staying			11%	23%	49%	17%
Value for money of establishment where staying		2%	7%	27%	51%	12%
Base: 83						

Ratings for accommodation (nett good)	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Range of accommodation in Shropshire	61%	58%	72%	53%	43%	68%
Quality of service in the establishment where staying	84%	72%	82%	69%	87%	79%
Value for money of establishment where staying	77%	78%	78%	75%	75%	85%

Comment:

Quality of service is rated lower in 2013 which maybe because of lower service quality and/or higher customer expectations – either way this should be investigated further.

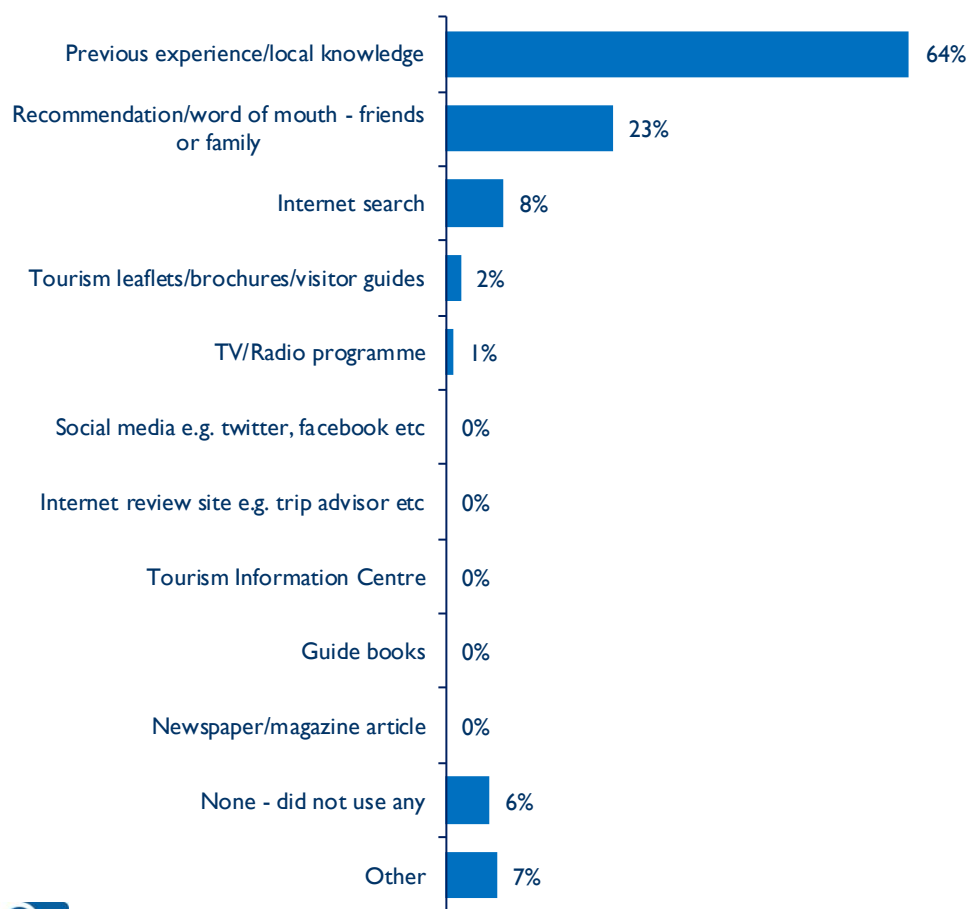
4.3 Information sources

From a prompted list, respondents were asked in a multi-response question which information sources, if any, were an influence when choosing to visit Northern Shropshire.

The answers shown overleaf have been ranked in order of the most frequently cited based on the information sources used before a visit.

The mean number of sources mentioned (including those who said didn't use any) was 1.07 suggesting few are using more than a single piece of information.

Q13. Influences when choosing to visit Northern Shropshire



Source: Qa Research 2013 Base: 430

Recommendation / word of mouth:

- Staying overnight (29%) – day trip (19%)
- First time visitor (42%) – repeat (18%)

Previous experience / local knowledge:

- Off-peak (71%) – peak (54%)
- Day trip (68%) - Staying overnight (57%)
- Repeat (75%) – first time (18%)



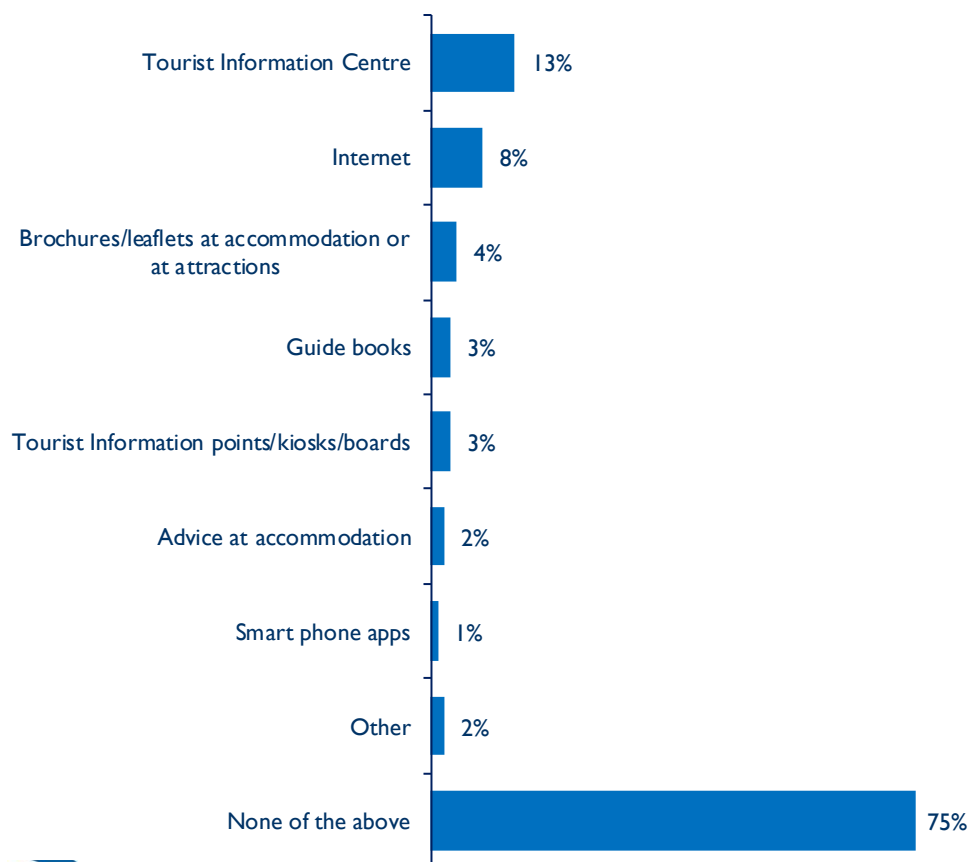
Internet search:

- Peak (12%) – off-peak (6%)
- First time visitor (24%) – repeat (4%)

Influences when choosing to visit the area	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Recommendation /word of mouth - friends or family	18%	24%	17%	25%	19%	22%
Previous experience /local knowledge	49%	68%	58%	67%	38%	69%
TV / Radio programme	0%	1%	0%	1%		
Newspaper /magazine article	1%	0%	1%	0%	1%	
Guide books	4%	0%	3%	0%	4%	1%
Tourism leaflets / brochures / visitor guides	4%	2%	2%	1%	7%	3%
Tourism Information Centre	0%	0%	0%		1%	1%
Internet search	4%	9%	5%	7%	3%	10%
None - did not use any	24%	6%	18%	5%	32%	7%

Visitors were then asked, using a prompted list, which information sources they had or expect to use to help plan their activities whilst in situ in Northern Shropshire.

Q14. Having arrived in Northern Shropshire have you or do you intend to use any of the following sources of information to help plan your activities?



Source: Qa Research 2013 Base: 432

Internet search:

- Peak (12%) – off-peak (6%)
- First time visitor (14%) – repeat (6%)
- Staying overnight (13%) – day trip (5%)

Brochures / leaflets at accommodation or attraction:

- ABC1 (6%) – C2DE (2%)
- Staying overnight (10%) – day trip (1%)

TIC:

- Staying overnight (25%) – day trip (8%)
- Peak (20%) – off-peak (8%)

Tourist Information points / kiosks / boards:

- Peak (7%) – off-peak (1%)

None of the above:

- Oswestry (83%) – North Shropshire District (69%)



The comparative table below is based on only those who used one or more information source (i.e. excludes anyone who said 'don't know').

Information sources used once in area	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
TIC	55%	52%	58%	48%	50%	61%
Advice at accommodation	7%	7%	8%	3%	5%	18%
Brochures / leaflets at accommodation or at attractions	25%	17%	25%	13%	24%	24%
Tourist Information points / kiosks / boards	29%	13%	37%	13%	16%	12%
Other	39%	44%	39%	44%	40%	45%

Comment:

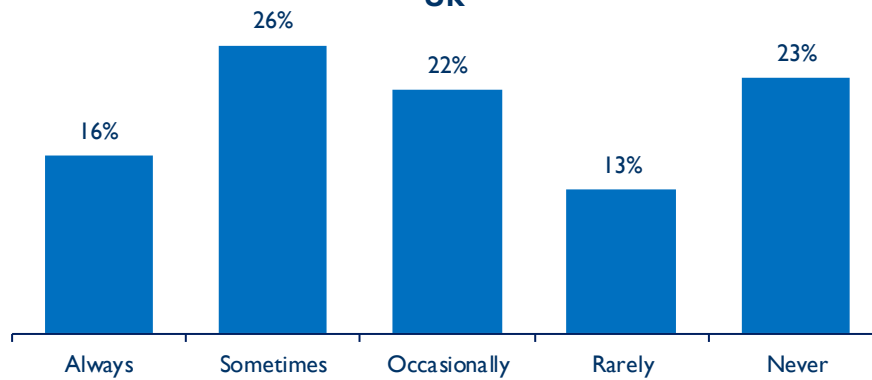
A high proportion of visitors to the area are regular repeat visitors so perhaps perceive they already know what the area offers. The figures suggest there is a challenge to promote new experiences and events to many visitors to the area or even get existing visitors to do different things when they return as many are not regarding any marketing communications at the moment and therefore may not be exposed to or become aware of anything new or different that they could do.

4.4 Usage and role of TICs

Amongst visitors to Northern Shropshire 13% had or expected to use a TIC during their visit to source information to help plan their activities, with a further 3% saying they will or have used a Tourist Information point, kiosk or board.

However, when asked later on about usage of TICs in the UK whilst on a leisure break the numbers saying they are likely to use is more than those who have done so whilst on their visit to Northern Shropshire.

Q20. How often use a TIC when on a leisure visit in the UK



Source: Qa Research 2013 Base: 432

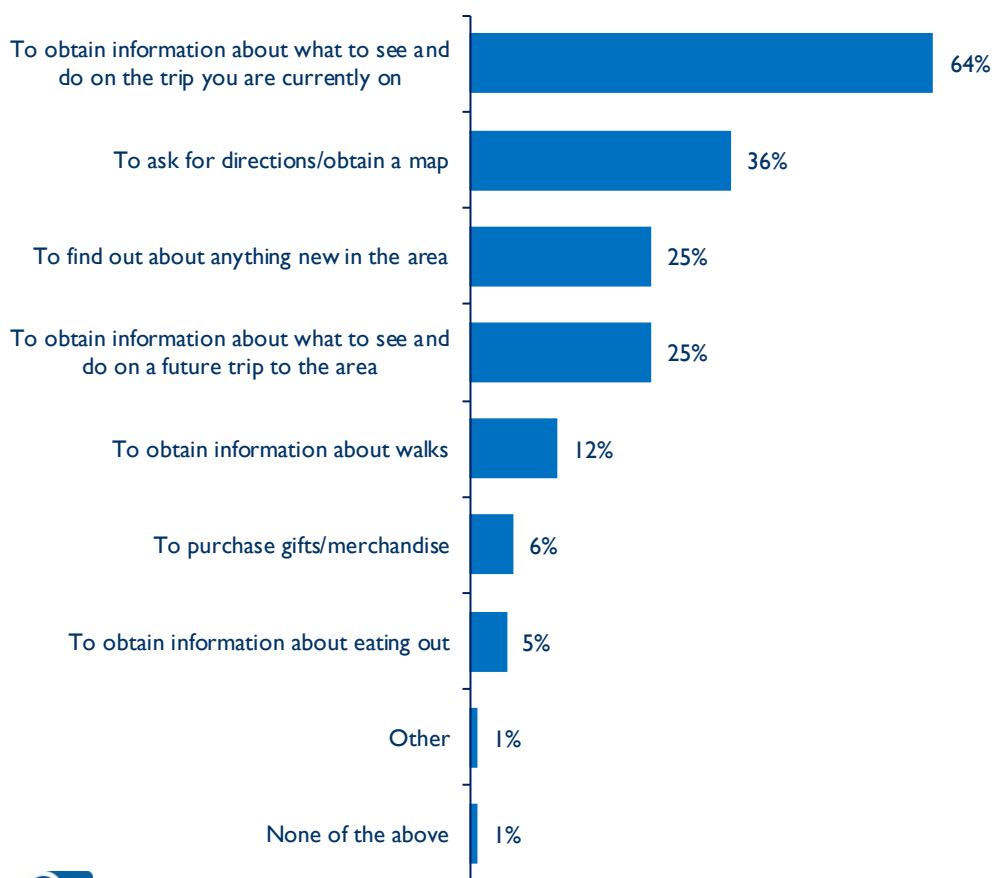
Reasons for using a TIC

Those who said they always, sometimes or occasionally use a TIC were shown a prompted list and asked what they use them for.

The findings have been shown overleaf in ranked order.



Q21. What using TIC for?



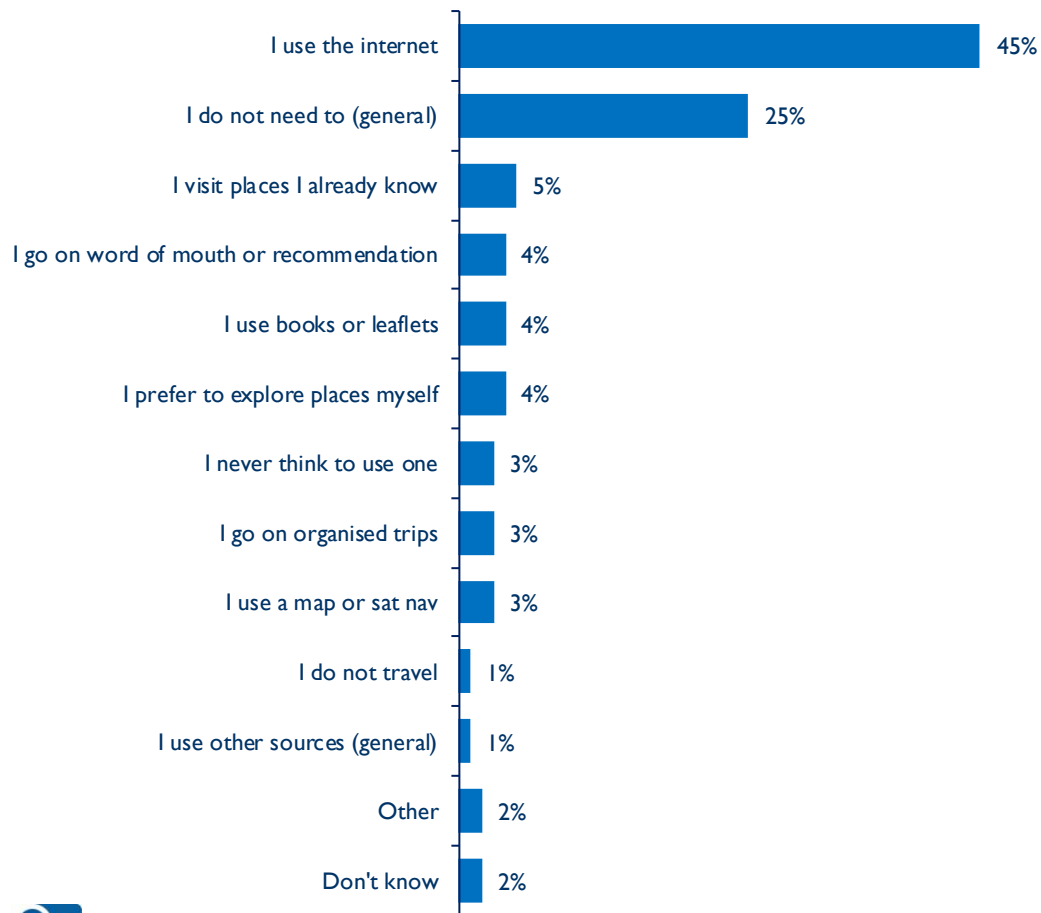
Source: Qa Research 2013 Base: 277

Those who said they rarely or never use a TIC were asked in an open ended verbatim response why they do not use a TIC when visiting an area.

The findings have been shown in ranked order.



Q22. Why not use a TIC when visiting an area?



Source: Qa Research 2013 Base: 150



4.5 Perceptions about the area

Qualities associated with Northern Shropshire

Respondents were asked using a prompted list what words they strongly associate with Northern Shropshire. The answers are shown in ranked order.

There was an option to say 'none of the above' but no-one selected this.

The 11% who gave an 'other' answer have been coded and grouped together to show these answers in the same table as below.

Q27. Words strongly associated with area	%
Scenic	71%
Peaceful	65%
Friendly	62%
Interesting	53%
Traditional	46%
Accessible	37%
Exciting	10%
Artistic	9%
Other - worldly	3%
Relaxing	2%
Boring	1%
Quaint	1%
Fun	1%
Rural	1%
Easy going	1%
Picturesque	1%
Tranquil	1%
Laid back	0%
Lovely	0%
Time warp	0%
Welcoming	0%
Other words (mentioned only once)	4%
Base: 432	

Peaceful:

- Staying overnight (81%) – day trip (56%)
- ABC1 (70%) – C2DE (59%)
- North Shropshire District (76%) - Oswestry (52%)

Scenic:

- Staying overnight (80%) – day trip (68%)
- ABC1 (78%) – C2DE (65%)
- Northern Shropshire District (76%) - Oswestry (64%)

Friendly:

- *Staying overnight (76%) – day trip (55%)*

Interesting:

- *Staying overnight (63%) – day trip (47%)*
- *ABC1 (58%) – C2DE (47%)*
- *North Shropshire District (58%) - Oswestry (46%)*

Traditional:

- *Staying overnight (56%) – day trip (41%)*

Exciting:

- *Visiting with children (15%) – without (7%)*

Artistic:

- *Repeat visitor (10%) – first time (4%)*

Accessible:

- *Repeat visitor (40%) – first time (24%)*

4.6 Visitor Experience

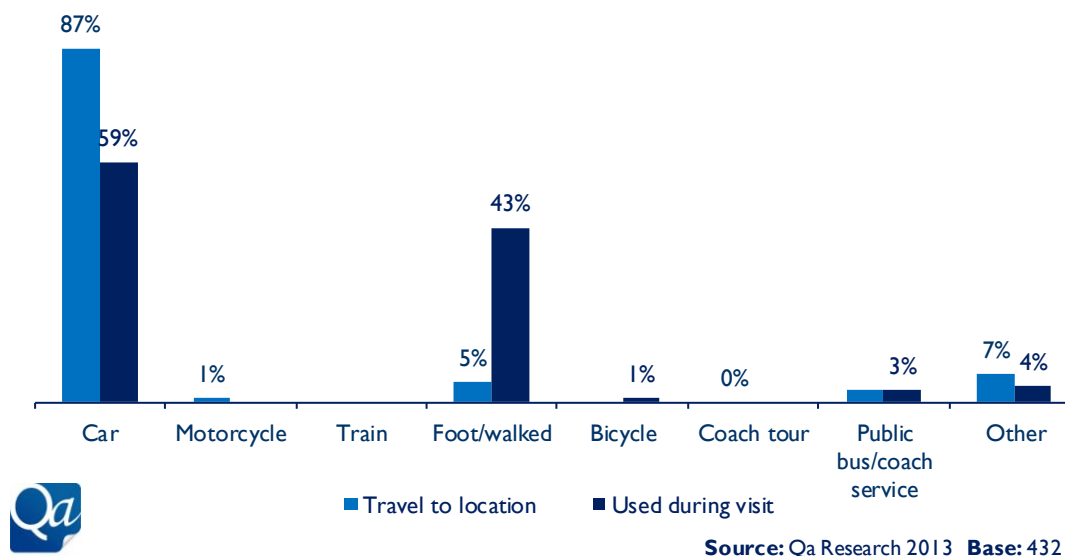
Transport usage

Respondents were asked what type of transport they had used to travel to Northern Shropshire and also what transport they have or will use to travel around the area during their visit.

The bar chart shows the transport used to get to the area and the line how visitors are then travelling around once in the area.

Multiple answers were permitted with the mean number of different forms of transport used to get to the area being 1.04 and to get around once in situ 1.10, suggesting that most visitors are only using a single form of transport both to get to the area and then to travel around.

Q15a/b. How travel to Northern Shropshire and the borderlands / transport used during visit to travel around area?



Travel to area - car:

- With children (95%) – without (83%)
- Day trip (92%) – overnight (81%)

Travel around during visit – foot / walked:

- With children (67%) – without (54%)

Travel around during visit – foot / walked:

- ABC1 (50%) – C2DE (35%)
- North Shropshire District (50%) - Oswestry (34%)

Transport used to travel to area	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Car /Motorcycle	79%	88%	71%	86%	89%	90%
Train	1%		1%		1%	
Foot/walked	2%	5%	1%	6%	3%	5%
Bicycle	1%	0%	2%	0%	0%	
Coach tour	2%	0%	1%		3%	1%
Public bus /coach	3%	3%	3%	2%	3%	4%
Other	13%	7%	23%	13%	1%	1%

Areas visiting

Visitors were asked, from a prompted list, which areas had they or were they going to visit during this trip to Northern Shropshire.

The answers are shown in ranked order from the most to least cited.

The table also shows the number of interviews conducted in these locations, showing even with the bias of conducting interviews in specific locations places like Oswestry and Whitchurch they are still key places people visit (amongst more than just those interviewed there).

The last column shows the profile of visitor if a place is attracting a significantly higher number of this visitor type.

Q16 Places have or will visit during this trip	%	Interviews conducted in location	Audience type more likely to be ...
Oswestry	28%	7%	
Ellesmere	31%	22%	<i>Day trip, repeat visitor</i>
Whitchurch	15%	8%	<i>Day trip</i>
Market Drayton	12%	5%	<i>Without children</i>
Wem	8%	5%	<i>Day trip, repeat visitor</i>
Shrewsbury	12%		<i>Day trip</i>
Ironbridge	2%		
Telford	3%		<i>ABC1</i>
Ludlow	2%		
Other	4%		<i>Without children</i>
None of the above	30%		
Base	431		

Towns & villages visiting	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Oswestry	36%	28%	21%	12%	55%	48%
Ellesmere	34%	31%	42%	49%	25%	10%
Whitchurch	28%	15%	41%	26%	13%	3%
Market Drayton	21%	12%	35%	22%	5%	1%
Wem	12%	8%	15%	13%	8%	2%
Shrewsbury	26%	12%	27%	16%	25%	8%
Ironbridge	13%	2%	13%	3%	12%	2%
Telford	15%	3%	15%	3%	15%	2%
Ludlow	12%	2%	11%	2%	12%	2%
None of the above	24%	31%	20%	16%	28%	48%

Attractions visiting

Using a prompted, list visitors were asked where they had or intended to visit during this trip. The answers are shown in ranked order, along with the profile of visitor if an attraction is attracting a significantly higher number of this visitor type.

Q18 Attractions have or will visit during this trip	%	Audience type more likely to be ...
Chirk Castle	15%	<i>Staying overnight, first time visitor, ABCI</i>
Park Hall Farm	10%	<i>Day trip, with children</i>
Hawkstone Park and Follies	10%	<i>With children, ABCI</i>
Pontcysyllte Aqueduct and Canal	8%	<i>Staying overnight</i>
Whittington Castle	5%	
Ironbridge Gorge Museums (any site)	3%	<i>ABCI</i>
Fordhall Farm	1%	
RAF Museum Cosford	1%	
Wollerton Old Hall Gardens	0%	
Other	5%	<i>Without children</i>
None of the above	53%	<i>Repeat visitor, without children, C2DE</i>
Base	430	

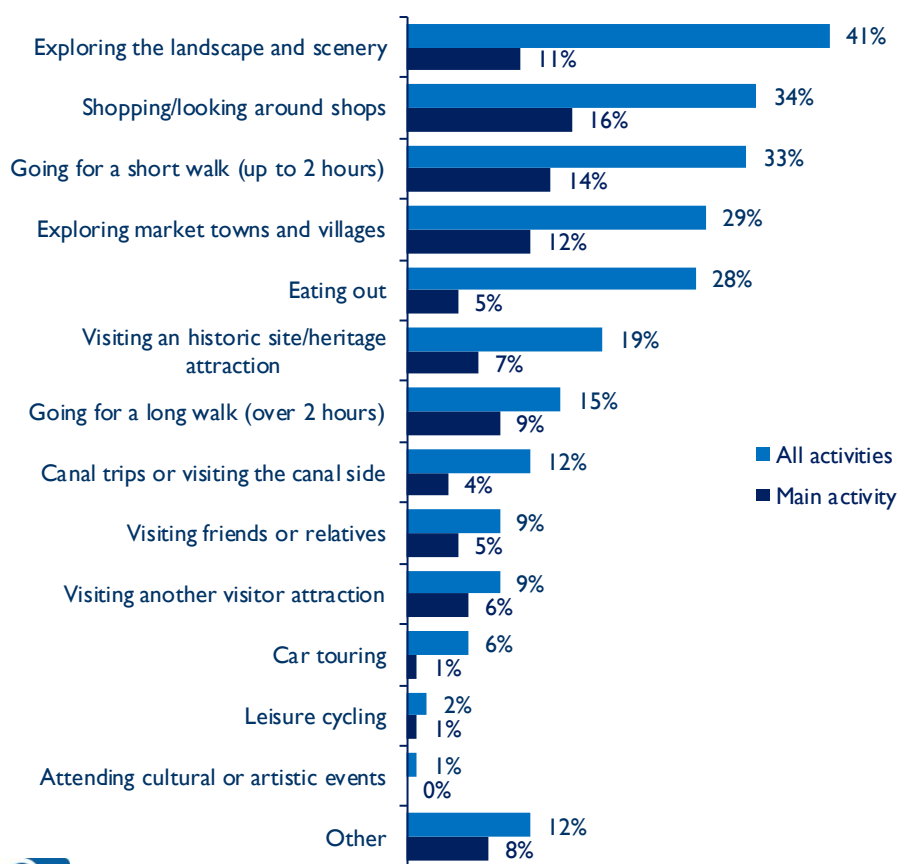
Activities undertaken

The activities visitors have or will participate in during their visit are shown in the chart below, with all activities shown in light blue and the main activity in dark blue.

The findings are shown in ranked order based on all the activities visitors will participate in.

The average number of activities is 2.49 (with day trippers doing less with a mean of 1.99 activities than overnight stayers, who do an average of 3.46 activities).

Q17a/b. Activities participating in during this visit to Northern Shropshire



Source: Qa Research 2013 Base: 432

Based on main activity undertaken:

Exploring the landscape & scenery:

- With children (15%) – without (8%)

Going for a long walk:

- Day trip (12%) – overnight (6%)
- ABC1 (14%) – C2DE (5%)
- North Shropshire District (15%) - Oswestry (3%)

Exploring market towns and villages:

- Staying overnight (19%) - day trip (9%)
- First time visitors (21%) – repeat (10%)
- Without children (15%) – with (8%)
- North Shropshire District (16%) - Oswestry (8%)



Visiting an historic site / heritage attraction:

- First time visitors (14%) – repeat (6%)
- With children (14%) – without (1%)
- Oswestry (14%) - North Shropshire District (1%)

Visiting another visitor attraction:

- Day trip (8%) – overnight (0%)
- Oswestry (11%) - North Shropshire District (1%)

Shopping / looking around shops:

- Day trip (22%) – overnight (5%)
- Repeat visitors (19%) - first time (5%)
- Without children (23%) – with (4%)
- Oswestry (25%) - North Shropshire District (8%)

Eating out:

- Day trip (7%) – overnight (2%)
- Without children (7%) – with (3%)
- North Shropshire District (8%) - Oswestry (3%)

Canal trip or visiting canal side:

- North Shropshire District (7%) - Oswestry (1%)

Visiting friends / relatives:

- Staying overnight (11%) - day trip (3%)
- Without children (7%) – with (3%)

Activities participate in (ALL)	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Exploring the landscape & scenery	57%	42%	63%	48%	49%	35%
Walking	31%	47%	43%	60%	17%	33%
Leisure cycling	2%	2%	3%	1%	0%	3%
Visiting historic site / heritage attraction	17%	19%	7%	8%	28%	32%
Visiting another visitor attraction	21%	10%	19%	5%	24%	15%
Shopping/looking around shops	34%	34%	37%	29%	30%	41%
Attending cultural or artistic events	1%	1%	1%	1%	1%	2%
Eating out	42%	29%	40%	34%	44%	24%
Visiting friends or relatives	10%	9%	12%	12%	9%	7%
Canal trips or visiting the canal side	10%	12%	18%	18%	1%	6%
Other	15%	12%	11%	9%	20%	15%

Activities participate in (MAIN)	Overall 2007	Overall 2013	North Shropshire 2007	North Shropshire 2013	Oswestry 2007	Oswestry 2013
Exploring the landscape & scenery	30%	12%	29%	15%	31%	9%
Walking	19%	27%	20%	39%	18%	14%
Leisure cycling	1%	1%	2%	2%	0%	1%
Visiting historic site / heritage attraction	5%	8%	1%	1%	10%	15%
Visiting another visitor attraction	14%	6%	13%	2%	15%	12%
Shopping/looking around shops		18%		10%		27%
Attending cultural or artistic events		0%				1%
Eating out	4%	6%	4%	10%	4%	3%
Visiting friends or relatives	7%	6%	7%	7%	7%	5%
Canal trips or visiting the canal side	8%	5%	15%	8%	1%	1%
Other	11%	9%	10%	7%	13%	12%

Visitor spend

Visitors were asked how much in total they had or expected their immediate party to spend during that day in the Shropshire Hills area.

The data has then been analysed and calculated to show in the table below the average (mean) spend figures first per party per day and then per person per day, along with the last two columns showing a break down based on day visitors and those staying overnight (all based on a per person figure).

Those saying £0 for any category have been included in the calculations for that category but anyone saying 'don't know' has been excluded for the calculations. The calculation for the overall total is calculated from all those who gave a definite answer for each spend category (i.e. they did not say 'don't know' for any answer), hence the figure may not add up to the sum of the individual spend categories.

Those staying overnight outside Shropshire have been classified as day visitors in the spend calculation so the spend by overnight stayers has been calculated from those actually staying in Shropshire.

Spend per day on	Average spend per group (£)	Average spend per person	Spend by day visitor	Spend by overnight stayer
Food and drink	16.52	6.56	5.14	10.64
Recreational activity	3.97	1.27	1.5	0.64
Travel in & around area (exc petrol)	6.9	3.03	2.65	4.11
Shopping for souvenirs and gifts	1.78	0.7	0.62	0.93
Other Shopping	9.97	5.09	4.49	6.81
Other expenses ⁸	0.72	0.38	0.11	1.12
Accommodation	8.12*	2.78*	-	12.45
Total	£44.80	£18.23	£14.24	£32.86

*NB: the average spend figures for accommodation here have been calculated based on everyone including day trippers and those staying overnight outside Shropshire (both groups assigned a £0 figure) and includes those staying with family and friends (also assigned a £0).

The party size used to calculate the per person averages includes children within the party.

4.7 Satisfaction with visit

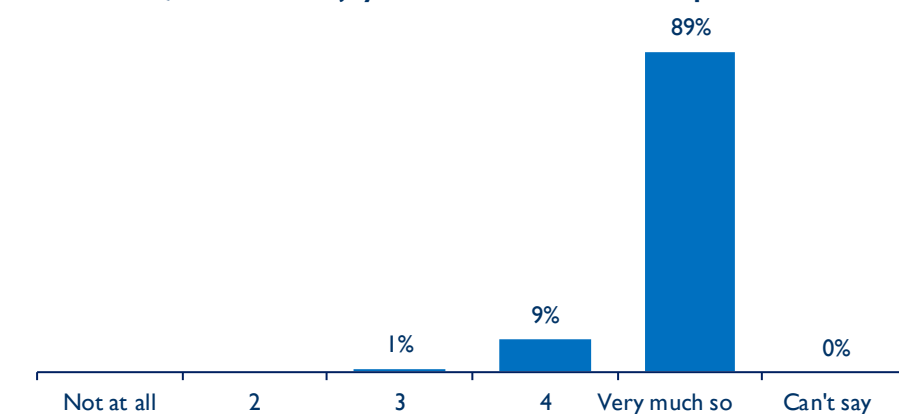
Satisfaction with a visit has been measured in a variety of different ways.

Enjoyment of visit

Respondents were asked to rate on a scale of 1 to 5 (with 1 being not at all and 5 very much so) the extent to which they had enjoyed their visit.

The chart shows a very high degree of satisfaction with visiting the area (98% giving a 4 or 5 rating).

Q24. Extent enjoyed visit to Northern Shropshire



Source: Qa Research 2013 Base: 432

⁸ This excludes one respondents answer of £28,000 for a new car

Net promoter score

Respondents were asked (Q25) on a scale of 0 (not at all) to 10 (very much so) how likely is it that they will recommend a visit to the Shropshire Hills area to a friend.

From the scores given a net promoter score, which gives a measure of customer loyalty, can be calculated.

Respondents can be categorised into one of three groups; promoters (i.e. those who gave a 9-10 rating); passives (7-8 rating); and detractors (0-6 rating).

Promoters are defined as loyal enthusiasts who will keep buying and actively refer others, fuelling growth; whilst detractors are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

To obtain a Net Promoter Score (NPS) the percentage of 'detractors' is subtracted from the percentage of 'promoters'⁹.

Amongst visitors the NPS for is (70% promoters – 3% detractors) = **67%**.

The profile of those most likely to be promoters are outlined below which may help in who to target to encourage pro-active advocacy.

Promoters:

- Repeat visitors (75%) - first time (46%)
- Without children (73%) – with (64%)
- North Shropshire District (85%) - Oswestry (52%)

Comment:

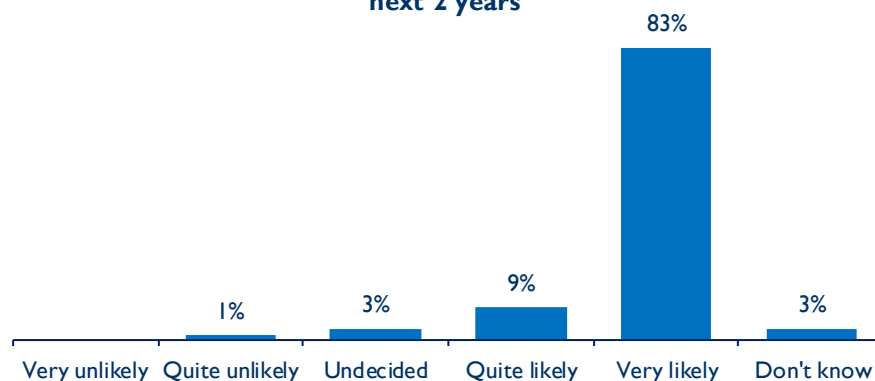
Net Promoter Scores for leisure destinations such as DMOs, AONBs / National Parks and free to enter museums are often high, typically ranging from 65% to 80% but how can this high level of positive advocacy be channelled into getting visitors to proactively 'sell' the area to others?

⁹ <http://www.netpromoter.com/np/calculate.jsp>

Likelihood to return

Respondents were asked how likely they were themselves to re-visit Northern Shropshire again in the next 2 years; the answers suggest a high level of satisfaction given the high numbers who will return.

Q26. Likelihood of re-visiting Northern Shropshire in the next 2 years



Source: Qa Research 2013 Base: 432

Net likely:

- Day trip (96%) – staying overnight (85%)
- Repeat visitors (95%) – first time (85%), lapsed (43%)

Improvements

Respondents were asked in an open ended question (Q28) for their top suggestions to improve the experience for visitors.

The verbatim answers have been provided in a separate excel document but have also been grouped together and shown as percentages in the table below, in ranked order.

The findings suggest satisfaction is high with 62% of respondents having no suggestions to make despite being prompted to suggest an improvement. For those with a suggestion there is no single issue which dominates.

Q28 Top suggestions to improve visitor experience	%
No suggestion	36%
Nothing	26%
More facilities for children or young people	4%
More or better shops	3%
More or improved parking facilities	3%
Improved signage or maps	3%
Improved toilet facilities	3%
Clean up litter or more litter bins	3%
Lower the cost	3%



More advertising	2%
Improve public transport	2%
More places to eat or drink	2%
Better maintenance of pathway and outdoor areas	2%
More or improved attractions	2%
Do not spoil the area or leave it alone	2%
Disabled access or facilities	1%
More available accommodation	1%
More information available	1%
Improve road infrastructure or road maintenance	1%
Other	4%
Base:	431

4.8 Appeal of green tourism

Reactions to potential developments

From a list of potential developments respondents were asked, if available in Northern Shropshire, how likely they were to use each of them. The table has been ordered from highest to lowest based on those saying they would 'definitely' use.

Q23 Appeal of product development	Unlikely	Possibly	Definitely
Actively choose to use a business that uses local produce and products	28%	44%	28%
To make a small contribution towards local conservation projects through a visitor giving scheme	44%	40%	16%
Specifically use accommodation and businesses which are environmentally responsible	56%	34%	9%
Use public transport instead of a car as an active green choice to travel around	72%	22%	7%
Base: 429			

Based on definitely use: Actively choose a business that uses local produce and products:

- Peak (33%) – off-peak (24%)
- Staying overnight (36%) - day trip (23%)

Specifically use accommodation and businesses which are environmentally responsible:

- Peak (13%) – off-peak (7%)
- ABC1 (13%) – C2DE (6%)

To make a small contribution towards local conservation projects through a visitor giving scheme:

- Day trip (19%) – staying overnight (9%)
- With children (21%) – without (13%)

Use public transport instead of a car as an active green choice to travel around:

- North Shropshire District (9%) - Oswestry (4%)

Comment:

Local produce that has a sense of place has broader appeal than 'green' initiatives. A purely 'green' agenda has little resonance or widespread appeal amongst current visitors and a decidedly lower appeal than our research often indicate amongst visitors to National Parks and AONBs.

5. Conclusions and observations

Visitor profile

Although the Shropshire Borderlands (Northern Shropshire) area attracts a range of different visitor types, the demographic profile of visitors suggests that they are more likely to be over 45, if visiting with children the children are likely to be younger (i.e. under 9) with an equal mix of ABC1 and C2DE socio-economic groups.

The area attracts considerably more day trippers than those staying overnight (66% of respondents were day visitors and 34% staying overnight with most of those staying inside Shropshire).

The area also attracts a very high proportion of regular frequent repeat visitors which suggests a high level of satisfaction and a stable visitor economy. However, there is also the need to cater for first time visitors who comprise a sizeable minority of visitors.

Those visiting whilst staying overnight are more likely to be staying within Shropshire than outside.

The places to visit and attractions also attract local residents who make up a proportion of the tourists visiting the area. The area is visited by local residents as well as those from further afield, with one in seven visitors being a 'local resident'.

Northern Shropshire and the borderlands predominately draws its core of visitors from reasonably near-by (with 83% of all visitors coming from the West Midlands, Wales and the North West).

The average spend per person per day is £18.23 (amongst day visitors it is £14.24 and those staying overnight in Shropshire £32.86).

Those staying overnight contribute considerably more economic value to the local economy than day visitors. Devising strategies to encourage visitors to stay overnight and extend their stay when in the area will have a greater economic impact than encouraging more day visitors.

Sources of information

The high proportion of regular repeat visitors and local residents means that the percentages that are influenced to visit the area by any 'above the line' marketing communications is quite low.

Even amongst first time visitors, recommendation or word of mouth is the powerful influence, being twice as impactful as the internet.

Given the high levels of returning amongst visitors and that a quarter cited information from family and friends as being a source of information they use, is there anything that can be done to assist previous and regular repeat visitors in becoming proactive advocates of the area? Exploring strategies in which the area can benefit from the high numbers of satisfied visitors by encouraging them to become pro-active advocates, helping to promote a visit amongst their friends and family may provide a cost effective channel of communication for the area.

For visitors to the area the TIC has not yet been superseded by the internet as the source for information about what to see and do.

Whilst in situ the TIC is still being used by more visitors as a source of information to help plan activities than the internet. However three quarters of visitors are not using any sources of information at all, perhaps due to the high proportion of regular repeat visitors; how can these visitors be exposed to or become aware of anything new or different that they could do whilst visiting to expand their repertoire of experiences.

Visitor experience

Visitors associate a range of positive words with Northern Shropshire, with the top three being 'scenic', 'peaceful' and 'friendly'. However, should any of these prompted associations be more positive and more highly recognised and associated with the area?

Visitors are visiting a wide range of places, attractions and doing a variety of activities during a visit; however does more need to be done to promote the things on offer and encourage, especially repeat visitors to the area to do more (paid for activities and visits) whilst in the area?

Visitor satisfaction

The high proportion of frequent repeat visitor, along with the ratings given for levels of enjoyment, and return themselves indicates a high level of satisfaction with the visitor experience.

The net promoter score suggests that here is a cohort of visitors who will actively promote the area but is there any assistance they could be given to help facilitate this?

Although the level of potential advocacy is high, the levels of visitor satisfaction are much higher, suggesting some visitors have enjoyed the experience but perhaps have not been sufficiently 'wowed' or inspired to actively tell others.

Green tourism

Promoting 'local' and 'regional' produce and experiences which create a unique sense of place rather than putting the focus on green initiatives per se (although one may achieve the other) are likely to have much more resonance amongst current visitors.

The majority of visitors are currently travelling to and around the area by car, with little interest in using public transport rather than the car as an active green choice to get around the area.

6. Appendix

6.1 Survey

Northern Shropshire Visitor Survey 2013

Interviewer	Date of Visit DD/MM/YY
	____ DD ____ MM ____ YY
Time	Survey Number (internal use)
Location	Q-C (internal use)

Introduction

Good morning/afternoon, my name is...I am working for an independent research company called Qa Research on behalf of Shropshire Council. We would be grateful if you could spare a few minutes to answer some questions.

The survey I have should take no longer than 10 minutes of your time.

Before we begin, this interview will be carried out according to the Market Research Society's Code of Conduct and all your answers and information provided will be treated as anonymous and confidential in accordance with the Data Protection Act 1998.

Q1. How far are you into your visit to Shropshire? (SHOW MAP)	(S)
Just at the beginning	1 <input type="checkbox"/> Close
About half way through	2 <input type="checkbox"/> Continue
Towards the end	3 <input type="checkbox"/> Continue

Q2. Which of the following best describes your visit to North Shropshire today? SHOWCARD I	(S)
Local resident on a leisure trip, visiting a place I come to once a week or more	1 <input type="checkbox"/> Close
Regular shopping trip	2 <input type="checkbox"/> Close
Business trip / place of work	3 <input type="checkbox"/> Close
Local resident on a leisure trip, visiting a place I come to less than once a week	4 <input type="checkbox"/> Go to Q9
Day trip from your home (lasting 3+ hours)	5 <input type="checkbox"/> Go to Q9
Visitor staying overnight in accommodation <u>inside Shropshire</u>	6 <input type="checkbox"/> Go to Q3a
Visitor staying overnight in accommodation <u>outside Shropshire</u>	7 <input type="checkbox"/> Go to Q3a
Other please specify	8 <input type="checkbox"/> Go to Q10

Overnight accommodation

Q3a. In total, how many nights are you staying away from home during this visit?	
Q3b. How many of these nights will be spent in North Shropshire (see map)?	

All those staying 0 nights within Northern Shropshire please go to Q10

Q4. During your stay in Northern Shropshire what type of accommodation are you or will you be staying in? - SHOWCARD 2			(M)
Hotel	1	<input type="checkbox"/>	
B&B/Guesthouse/Farmhouse	2	<input type="checkbox"/>	
Touring Caravan	3	◀	
Rented self catering cottage / flat / house	4	▶	
Static caravan	5	▲	
Boat	6	▼	
Friends or relatives home	7	◀◀	Go to Q10
Second home	8	▶▶	Go to Q10
Other– <i>please specify</i>	9	◀◀	

Q5. Did you book your accommodation before arriving in Shropshire or on arrival?			(S)
Before arrival	1	<input type="checkbox"/>	Continue
On arrival	2	<input type="checkbox"/>	Continue
Have not booked yet	3	◀	Go to Q10

Q6. Which of the following best describes how you booked the accommodation that you are staying in whilst visiting Northern Shropshire?			(S)
Direct with establishment – by phone	1	<input type="checkbox"/>	
Direct with establishment – by email	2	<input type="checkbox"/>	
Tourist Information Centre in Shropshire	3	◀	
Via establishments own internet site	4	▶	
Via internet other than establishments own (<i>please specify website</i>)	5	▲	
Other (<i>please specify</i>)	6	▼	

Q7. How much are you and your party spending on accommodation in Northern Shropshire for your whole trip? <i>(if free accommodation put £0)</i>	£	D/K
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Q8. On a scale from 1 to 5 (with 1 being very poor and 5 being very good) how would you rate the following?

	Very poor	Poor	Average	Good	Very good	Don't know
a. Range of accommodation in Shropshire	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	▼
b. Quality of service in the establishment where you are staying	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	▼
c. Value for money of the establishment where you are staying	<input type="checkbox"/>	<input type="checkbox"/>	◀	▶	▲	▼

ASK DAY VISITORS ONLY

Q9. How long do you expect your visit to last today?

	_____ Hrs _____ mins
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ASK ALL

Q10. Is this your first ever visit to Northern Shropshire (show map)?

	(S)
Yes	<input type="checkbox"/> 1 <input type="checkbox"/> Go to Q12
No	<input type="checkbox"/> 2 <input type="checkbox"/> Continue

Q11. Excluding today, how many times have you visited Northern Shropshire in the last 3 years?

	(S)
Once before	<input type="checkbox"/> 1
Twice	<input type="checkbox"/> 2
Three times	<input type="checkbox"/> 3
4 or more <i>(please specify)</i>	<input type="checkbox"/> 4

Q12. Who are you visiting with today?

	(S)
Alone	<input type="checkbox"/> 1
With partner	<input type="checkbox"/> 2
With friends	<input type="checkbox"/> 3
With family	<input type="checkbox"/> 4
With family AND friends	<input type="checkbox"/> 5
Organised group	<input type="checkbox"/> 6
Other (please specify)	<input type="checkbox"/> 7

Q13. Which, if any, of the following was an influence when choosing to visit Northern Shropshire? SHOWCARD 3 (M)

1. Recommendation / word of mouth - friends or family	<input type="checkbox"/>
2. Previous experience / local knowledge	<input type="checkbox"/>
3. TV / Radio programme	◀
4. Newspaper / magazine article	▶
5. Guide books	▲
6. Tourism leaflets / brochures / visitor guides	▼
7. Tourist Information Centre	◀◀
8. Internet search	▶▶
9. Internet review site e.g. trip advisor etc	◀◀
10. Social media e.g. twitter, facebook etc	🗨️
11. None – did not use any	🚫
12. Other <i>please specify:</i>	✖

Q14. Having arrived in Northern Shropshire have you or do you intend to use any of the following sources of information to help plan your activities? SHOWCARD 4 (M)

Tourist Information Centre	1	<input type="checkbox"/>
Advice at accommodation	2	<input type="checkbox"/>
Brochures / leaflets at accommodation or at attractions	3	◀
Tourist Information points / kiosks / boards	4	▶
Guide books	5	▲
Smart phone apps	6	▼
Internet	7	◀◀
Other (<i>please specify</i>)	8	▶▶
None of the above	9	◀◀

Q15a. What types of transport did you use to travel to Northern Shropshire & the borderlands? SHOWCARD 5 (M) (M)

Q15b. What types of transport have you used or will you use during this visit to travel around the area? SHOWCARD 5 Q15a Q15b

Car	1	<input type="checkbox"/>	<input type="checkbox"/>
Motorcycle	2	<input type="checkbox"/>	<input type="checkbox"/>
Train	3	◀	◀
Foot / walked	4	▶	▶
Bicycle	5	▲	▲
Coach tour	6	▼	▼
Public bus / coach service	7	◀◀	◀◀
Other <i>Please specify below:</i>	8	▶▶	▶▶

Q16. What towns and villages in Shropshire have you or do you intend to visit during this trip? SHOWCARD 6			(M)
Oswestry	1	<input type="checkbox"/>	
Ellesmere	2	<input type="checkbox"/>	
Whitchurch	3	◀	
Market Drayton	4	▶	
Wem	5	▲	
Shrewsbury	6	▼	
Ironbridge	7	◀◀	
Telford	8	▶▶	
Ludlow	9	◀◀	
Other (<i>please specify</i>)	10	💬	
<input type="text"/>			
None of the above	11	👤	

Q17a. What activities have you or will you participate in during your visit to Northern Shropshire? SHOWCARD 7		
Q17b. What is the main activity that you have or will participate in during your visit to Northern Shropshire? SHOWCARD 7		
	Q17a ALL (M)	Q17b MAIN (S)
Exploring the landscape and scenery	<input type="checkbox"/>	<input type="checkbox"/>
Going for a short walk (up to 2 hours)	<input type="checkbox"/>	<input type="checkbox"/>
Going for a long walk (over 2 hours)	◀	◀
Car touring	▶	▶
Leisure cycling	▲	▲
Exploring market towns and villages	▼	▼
Visiting an historic site / heritage attraction	◀◀	◀◀
Visiting another visitor attraction	▶▶	▶▶
Shopping / looking around shops	◀◀	◀◀
Attending cultural or artistic events	💬	💬
Eating out	👤	👤
Visiting friends and relatives	✂	✂
Canal trips or visiting the canal side	🚢	🚢
Other (<i>please specify</i>)	”	”
<input type="text"/>		

Q18. Which of the following attractions have you or do you intend to visit during this trip? SHOWCARD 8			(M)
Park Hall Farm	1	<input type="checkbox"/>	
Whittington Castle	2	<input type="checkbox"/>	
Hawkstone Park & Follies	3	<input type="checkbox"/>	
Fordhall Farm	4	<input type="checkbox"/>	
Wollerton Old Hall Gardens	5	<input type="checkbox"/>	
Pontcysyllte Aqueduct & Canal (including Chirk Aqueduct) World Heritage Site	6	<input type="checkbox"/>	
Chirk Castle	7	<input type="checkbox"/>	
Ironbridge Gorge Museums (any site)	8	<input type="checkbox"/>	
RAF Museum Cosford	9	<input type="checkbox"/>	
Other (<i>please specify</i>)	10	<input type="checkbox"/>	
None of the above			11 <input type="checkbox"/>

Q19. Approximately, how much in total have you and your immediate party spent or expect to spend on <u>today's visit in Northern Shropshire</u> on the following SHOWCARD 9 (<i>put on £0 if spent/expect to spend nothing</i>)		D/K
Food and Drink	£	<input type="checkbox"/>
Recreational activities and entertainment (including admission charges to attractions)	£	<input type="checkbox"/>
Travel in an around the area (including fuel costs)	£	<input type="checkbox"/>
Shopping for souvenirs and gifts	£	<input type="checkbox"/>
Other shopping	£	<input type="checkbox"/>
Other expenses	£	<input type="checkbox"/>

Usage and role of TICs

Q20. How often do you use Tourist Information Centers when on a leisure visit in the UK?			(M)
Always	1	<input type="checkbox"/>	Go to Q21
Sometimes	2	<input type="checkbox"/>	Go to Q21
Occasionally	3	<input type="checkbox"/>	Go to Q21
Rarely	4	<input type="checkbox"/>	Go to Q22
Never	5	<input type="checkbox"/>	Go to Q22

Q21. What do you use Tourist Information Centers for? SHOWCARD 10 (M)

To obtain information about what to see and do on the trip you are currently on	1	<input type="checkbox"/>
To obtain information about what to see and do on a future trip to the area	2	<input type="checkbox"/>
To ask for directions / obtain a map	3	<input type="checkbox"/>
To purchase gifts / merchandise	4	<input type="checkbox"/>
To obtain information about walks	5	<input type="checkbox"/>
To obtain information about eating out	6	<input type="checkbox"/>
To find out about anything new in the area	7	<input type="checkbox"/>
Other (<i>please specify</i>)	8	<input type="checkbox"/>
None of the above	9	<input type="checkbox"/>

ONLY ASK Q22 IF NEVER OR RARELY VISIT TICs DURING A VISIT

Q22. Why do you not visited a Tourist Information Centre when visiting an area?

Appeal of green tourism

Q23. If available in Northern Shropshire, how likely are you to... SHOWCARD 11

	Unlikely	Possibly	Definitely
Specifically use accommodation and businesses which are environmentally responsible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To make a small contribution towards local conservation projects through a visitor giving scheme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Actively choose to use a business that uses local produce and products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use public transport instead of the car as an active green choice to travel around	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Overall evaluation of visit

Q24. On a scale of 1 to 5, with 1 being not at all and 5 being very much so, to what extent have you enjoyed your visit to Northern Shropshire?

Not at all	2	3	4	Very much so	Can't say
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q25. On a scale of 0 to 10 with 0 being 'not at all' and 10 'very likely', how likely is it that you will recommend a visit to Northern Shropshire to a friend?

0	1	2	3	4	5	6	7	8	9	10
-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>)

Q26. How likely are you to re-visit Northern Shropshire yourself for a leisure trip in the next 2 years?

Very unlikely Quite unlikely Undecided Quite likely Very likely Don't know

 ◀ ▶ ▲ ▼

Q27. Which of the following words do you strongly associate with Northern Shropshire? (M)

Peaceful	1	<input type="checkbox"/>
Boring	2	<input type="checkbox"/>
Scenic	3	◀
Other-wordly	4	▶
Friendly	5	▲
Artistic	6	▼
Interesting	7	◀◀
Traditional	8	▶▶
Exciting	9	◀◀
Accessible	10	💬
Other (<i>please specify</i>)	11	👤
None of the above	12	✖

Q28. What would be your top suggestion to improve the experience for visitors?

Nothing
No suggestions

About you

Q29. Including yourself, what are the ages and gender of all those in your immediate party today (SHOWCARD II TABLE of AGE BANDS & GENDER)?	Number of male	Number of female
0-9 years		
10-14 years		
15-18 years		
19-24 years		
25-34 years		
35-44 years		
45-54 years		
55-64 years		
65+ years		
Part of a coach party		

Q30. What is the occupation of the head of your household/chief wage earner? *(If retired, please give previous occupation and write retired before the occupation)*

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Q31. What is your postcode?

*This will be used for analysis purposes only.
It will not be used to identify you, or be passed on to any third parties*

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Or country of residence if visiting from overseas? (please write in)

Q32. As part of our quality control procedure, a research supervisor may contact you in order to confirm the accuracy of the interview and to ensure you were happy with the interview.

Yes	<input checked="" type="radio"/>	1	<input type="checkbox"/>	Capture details
No	<input type="radio"/>	2	<input checked="" type="checkbox"/>	

6.2 Socio-economic group definitions

A - Upper Middle Class: Higher Managerial, Administrative or Professional

B - Middle Class: Intermediate Managerial, Administrative or Professional

C1 - Lower Middle Class: Supervisory or Clerical, Junior managerial, Administrative or Professional

C2 - Skilled Working Class: Skilled Manual Workers

D - Working Class: Semi and Unskilled Manual Workers

E - Those at lowest level of subsistence: State Pensioners or Widows (no other earner), Casual or Lowest Grade Workers