Abingdon Visitor Research Programme

A study of tourism in Abingdon

Final Report

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Notes on terminology

'Visitors' as used in this document refers to non-residents using the town centre and includes anyone who does not define themselves as living within Abingdon. We therefore consider them "Visitors with a small v" i.e. including people from surrounding communities, as well as those from the rest of Oxfordshire and farther afield.

'Destination' as used in this document refers to Abingdon as a town and the surrounding hinterland that would form part of the visitor experience, we are therefore not focussing exclusively on the town centre.

1. Executive Summary

1.1 Introduction

In February 2012 The Choose Abingdon Partnership appointed Hidden Britain to deliver a visitor directed research programme within the town to provide key understanding and a solid evidence base for future economic and tourism derived planning and decision making.

These initial pages summarise the key findings and recommendations

1.2 Destination context

a) Product Audit

- The audit shows a fairly healthy visitor offer given the size of the destination, with a particularly healthy accommodation sector. Catering is well represented both in range and number, and although the number of specific visitor attractions is limited there is plenty of additional activity and opportunities for visitor interaction .

b) Comparative Research in other destinations

- Overall the picture from comparative visitor studies in Market Towns is remarkably consistent , outlining an older demographic, largely short stays, little awareness of direct marketing, an average spend of between £20-£40 per day, and high levels of satisfaction in the experience and a high likelihood of recommending. There does appear to be a division in terms of the motivations for a visit between a Market Town as a "visitor destination" and a Market Town as a more functional service centre.

c) Wider Trends

- Despite economic downturn and worries over further recessions, prospects for long-term growth in tourism remain strong, and there are specific trends within tourism growth that play very much to the strengths of market towns and rural locations. However to harness benefit from these trends, these destinations need to work cooperatively, make the choice easy for the consumer and deliver a quality experience.

1.3 Situational Analysis

a) Mystery Visitor Study

- Abingdon scores well in terms of visitor experience on the ground with a score 5% above the national average for this kind of study.

- Abingdon's key strengths lie in its physical appearance, quality of service (specifically within the Tourist Information Centre) and the range and quality of retail and catering options.

- Weaker areas included; state of the public toilets, proportion of vacant shops, signage and directional information and lack of evening or weekend opening hours.

b) Marketing Assessment

- Abingdon scores poorly in terms of its external marketing with a score 25% below the average for this kind of study . However it should be stressed that few destinations do effectively market themselves (hence the low average score of 65.8).

- Currently, Abingdon does not present a clear and consistent offer or identity to the visitor, there is no consensus about what the destination has to offer, what an experience there consists of and chiefly why a visitor would want to come.

- When communications are made, the channels and media are poorly adapted to the needs of the visitor.

- We can consider that Abingdon is underperforming on expectation but certainly delivering on experience. This is a position of strength to build from and is certainly more advantageous than the reverse and it is therefore consequently easier to address the key issues.

1.4 Business Survey

- Of the businesses that responded to the survey, the highest proportion was retailers (32%) , followed by professional (26%), then accommodation (23%) and then food & drink (16%). No businesses described themselves as "visitor attractions" or "activity providers".

- 64% of those surveyed indicated that 'Tourism and Visitor spend' was either 'Very Important' (32%) or 'Important' (34%) to their business.

- businesses thought their customers were responding more than twice as often to "passive" marketing (Word of Mouth, repeat business and passing trade) as they were to more "active" marketing on their part.

- 77% of the Businesses surveyed reported that 'one customer on a visit' would spend over '£20.01'. 27% of this cohort reported that the consumer would spend between £75.01-£150.00'.

- Business performance and confidence is mostly very high and in fact Abingdon appears to be performing almost exactly as would be expected for a town of its size. Clearly the economic downturn has taken a toll but local confidence is buoyant.

- 73% of Businesses felt that 'Potential Local Customers' was a 'Positive' aspect of operating in Abingdon, whilst 53% stated 'Prosperity of the Town' and the same figure 'Geographical Location'. 47% of Businesses noted 'Potential Tourist Customers' as a 'Positive'.

- 44% of Businesses recorded 'Car Parking Price' as a 'Negative' aspect of operating in Abingdon and 41% 'Rental Values and Property Costs'.

- 87% of respondents were 'Aware of the Choose Abingdon Partnership', however only 57% of accommodation and 80% of Food & Drink businesses were aware.

- In regards to what improvements they would like to see made in Abingdon the following themes were clearly articulated; 'Car Parking and Traffic' , 'Promotion, Advertising & Marketing' , 'Business Rates and Incentives' and 'Physical Redevelopment of the town and infrastructure'

- Based on the data collected from this survey we can venture that Abingdon is performing similarly to other towns in terms of its local economy.

1.5 Visitor Survey

- 53% of those interviewed were aged over 56 giving Abingdon a visitor demographic skewed towards an older market.

- 46% of visitors come from within Oxfordshire, and a total of 88% travelled less than 75 miles to reach Abingdon.
- The highest proportion of visitors was adult couples or adults travelling with other adult family members.

- 75% of respondents arrived by private motorised transport, 17% by public transport and 8% on foot or by bike.

- Primary reasons for visiting Abingdon were 'visit a tourist attraction' (19%), 'visit friends and relatives' (17%) and 'attend an event' (15%). This suggests non-Abingdon residents are largely using the town for leisure purposes as opposed to more everyday service uses.

- In terms of influencing factors on a visit the highest responses were to more passive or experiential marketing factors; 36% reported 'Visited before', 30% 'Word of Mouth', 10% 'Passing By' and 6% at the Tourist Information centre. Direct marketing showed a very low impact on the sampled audience.

- 46% of visitors stated that beyond the main purpose of their visit to Abingdon they had also 'Eaten Out', whilst 39% reported they had completed a 'Short Walk or Easy Outdoor Activity' and 38% had been 'Shopping for Comparison Goods.'

- 59% of visitors indicated that they expected to spend between '£10.01-£50.00' on their visit to Abingdon. Twice as many visitors were intending to spend £10 or less as those who would spend £50 or more.

- Abingdon’s visitor profile shows a tendency towards short day visits with 35% of visitors reporting that they intended to stay for ‘2-4 hours’ on their visit to Abingdon and 23% ‘1-2 hours.’ Only 16% planned to make their visit longer than a day.

- On the day they were surveyed, 89% of visitors had been to the ‘Market Place/ Town Centre’, 43% had been to the ‘Riverside’ and 37% Abbey Park and Gardens.’ It’s clear from this data that the Market Place is the focal point of 9 out of 10 visits to the town; it also shows that the Abbey Park & gardens and the Riverside feature largely as part of an Abingdon experience.

- Overall visitor satisfaction with Abingdon was very high, with 86% of respondents rating the ‘Physical Appearance’ as either ‘Good’ (50%) or ‘Very Good’ (36%). Service and welcome scored similarly highly with 80% of respondents rated the ‘Service’ they had received in Abingdon as either ‘Good’ (51%) or ‘Very Good’.

- 73% of visitors rated Abingdon as either ‘Good’ (54%) or ‘Very Good’ (19%) in regards to being able to find their way around the town in a ‘Car’ and 83% of visitors rating Abingdon as either ‘Good’ (63%) or ‘Very Good’ (20%) in regards to being able to find their way around the town ‘On Foot’.

- Abingdon’s most positive aspects were ‘Historical Setting’ 56%, ‘Natural Environment’ 41%’, ‘Places to Eat’ 36% , ‘Visitor Attractions’ 33% and ‘Feeling of Welcome’ 36% .

- In terms of negative aspects elements making a visit difficult or unpleasant featured highly (‘Public Toilets’ 35% and ‘Car Parking’ 20%), yet the highest negative perception was Shopping at 38%.

- 95% stated that they would ‘visit Abingdon again’ and 80% reported that they would ‘recommend Abingdon to others as a place to visit.’

- In regards to what would improve the visitor experience in Abingdon the following themes were clearly articulated; ‘Retail Offer’ , ‘The Precinct’ , 'Improving signage' , ‘Traffic & transport’ , ‘Improvements to the River', ‘Car parking’ and ‘Public Toilets’.

1.6 Conclusions

1. The data shows that Abingdon's visitors are coming for leisure reasons, and largely specific ones as opposed to a general "day out in the country".

2. The audiences are typical of what we would expect in a Market Town of Abingdon's size, being largely an older demographic comprising of day visitors from home from within 1.5 hours travel and staying for generally less than a full day.

3. It is clear that Abingdon offers a good experience to visitors once they have arrived, and that there is a high degree of satisfaction which leads to recommendations and return visits.

4. It is also clear from the Product Audit that Abingdon offers a relatively diverse and robust offer to encourage visitors in.

5. A high proportion of businesses recognise visitor spend as a vital part of the economy, and an encouragingly large amount are aware of the Choose Abingdon Partnership which will be useful if it chooses to be the leading spear head for tourism in the town.

6. Business performance and confidence whilst slightly lower than wider averages is still strong within Abingdon and will only benefit from an increased leisure and visitor market.

7. The setting of Abingdon on the river and its historic character are key features within its visitor economy, offer and experience and should be placed front and centre within any promotional or developmental strategy taken forward.

8. However there is the need to implement a clear and consistent strategy and implementation model to direct visitor and tourism development

9. Certain aspects of the in-situ experience require attention

10. Specific attention is needed on Abingdon's external communications

11. There needs to be an emphasis on partnership working within the destination and bringing the diverse interests, groups and businesses together to work in a cohesive direction

12. New developments, infrastructure and facilities should be prioritised to complement and improve the Abingdon visitor offer.

13. Research should be undertaken regularly and systematically to provide an ongoing benchmark and measure for change.

2. Introduction

2.1 Abingdon Profile

Abingdon is the largest town within the area of the Vale of White Horse District Council and, with a population of over 33 000, is regarded as a large traditional market town. Its immediate surroundings are rural with a hinterland of villages including; Radley, Clifton Hampden, Culham, Sutton Courtenay, Drayton, Marcham, Frilford and Shippon.

Abingdon is 5.5 miles (8.9 km) south of Oxford and 5 miles (8 km) north of Didcot in the flat valley of the Thames on its west (right) bank, where the small river Ock flows in from the Vale of White Horse. It is adjacent to the A34 trunk road, and although Abingdon has no rail service of its own, the small stations at Culham and Radley are both just over 2 miles (3.2 km) away.

Abingdon is: *"Located six miles south-west of Oxford, the former county town of Berkshire had a slight name change in 2012 to become Abingdon-on-Thames. Best known for MG Car manufacturing, Abingdon is recognised for special architectural merit with some thirty-four 17th century buildings and twenty-two even older."*

"Evidence exists of an early Bronze Age settlement which, at over 6,000 years old, makes Abingdon the oldest continuously occupied town in Britain. An Abbey was established in the 7thcentury which was visited by William the Conqueror and his son, the future Henry I, was educated here. By the time of Henry VIII's dissolution of the monasteries, Abingdon Abbey was the sixth richest in Britain. Parts of the building remain and play an active part in community events".

"The town was granted a market charter in the 13th Century and there is a market each Monday and Farmers' Market on the third Monday in the month. There are riverside parks and gardens, space for angling and leisure facilities for tennis, swimming and boating."[1]

In 2010, the total expenditure by visitors in South Oxfordshire was £228 million (an increase of just over 2.6% on 2009) and in the Vale was £200.5 million (an increase of 2.3% on 2009).[2] This spending is spread across a wide range of service sectors from catering and retail to accommodation providers. According to the Office of National Statistics, there are 66,000 jobs across the Vale District (included self-employed) and 68,000 jobs in South Oxfordshire dependent on tourism. Based on our estimates, total tourism related expenditure supports 5% (Vale) and 6% (SODC) of these jobs in the District.

[1] description taken from www.southernoxfordshire.com

[2] source: "Economic impact of tourism in South Oxfordshire" and "Economic impact of tourism in Vale of White Horse", 2010 reports

2.2 Purpose & Aims

In February 2012 The Choose Abingdon Partnership appointed Hidden Britain to deliver a visitor directed research programme within the town to provide key understanding and a solid evidence base for future economic and tourism derived planning and decision making.

Like many towns Abingdon has a dearth of existing evidence on which to base its future planning, therefore this programme has been designed to answer some of the fundamental questions surrounding Abingdon's visitor economy.

Firstly the programme will look at Abingdon itself to build a snapshot of how it currently sits as a destination and how it performs. In order to do so we will ask the following key questions:

- What does Abingdon have to offer?
- How is the town's economy performing?
- How important a role does tourism play in the local economy?
- What do businesses perceive needs to be done to improve?
- How does the expectation of Abingdon compare to the experience?
- How does Abingdon fit into the wider issues and landscape of tourism?

Secondly the programme will look at Abingdon's visitors to profile them in terms of; who they are, what motivates them, their behaviours and what they think of the town and destination. In order to do so we will ask the following key questions:

- What kinds of people visit Abingdon?
- What are their motivations for a visit?
- What behaviours and activities do they undertake?
- What are their perceptions of Abingdon?
- What improvements would make Abingdon more attractive to them?

In answering these questions this research programme will therefore aim to provide Abingdon with:

- A solid baseline from which to measure progress in the development of the visitor economy
- A thorough understanding of its tourism and visitor context
- Indications of how Abingdon should develop its offer, identity and marketing
- An understanding of its key audiences and markets
- An outline of where action is required
- A clear justification for undertaking that action moving forward

The Choose Abingdon Partnership intends to utilise the findings of this programme in the development of a strategy to underpin tourism and visitor activities in Abingdon over the next few years in a consistent and cohesive manner.

Hidden Britain will be working with the Choose Abingdon Partnership to develop this strategy over the coming months.

2.3 Research Methodology

In order to deliver on the above aims and provide the necessary data to answer the key questions, Hidden Britain, in conjunction with the Partnership, developed a research strategy based on the following tools:

- Review of existing research
- Tourism Product Audit
- Mystery Visitor Assessment
- External Marketing assessment
- Business Survey
- Visitor Survey

These tools and their respective methodologies are elaborated in the following sections.

2.3.1 Review of existing research

This study would cover any existing visitor research or data within the town or in surrounding areas with the aim of building a picture of current knowledge. This study also looks at the wider context of tourism; what the larger trends, macro-environmental factors and larger issues are and how they may affect or direct how tourism in Abingdon develops.

For this study the Choose Abingdon Partnership identified several relevant pieces of research, namely:

- Dorchester-on-Thames Visitor Survey 2005 (Tourism South East)
- South Oxfordshire Visitor Study 2009 (Q and A Research)
- Vale of the White Horse Tourism Economic Impact study 2009 (Tourism South East)
- Vale of the White Horse Tourism Economic Impact study 2010 (Tourism South East)
- Oxfordshire Tourism Economic Impact study 2010 (Tourism South East)
- Vale free car parking survey report November 2011 (Vale of White Horse District Council)

Hidden Britain also sourced and reviewed relevant research as follows:

- Great Britain Tourism Survey 2011 (Visit England)
- International Passenger Survey 2011 (Office of National Statistics)
- Annual Survey of Visits to Visitor Attractions 2011 (Visit England)
- Great Britain Day Visits Survey 2011 (Visit England)
- Further niche research on specific issues

In each case the research was reviewed to derive trends and indicators impacting on or relating to tourism in Abingdon.

2.3.2 Tourism Product Audit

A comprehensive cataloguing exercise looking at all the elements in the destination a visitor would interact with, thereby building an understanding of what Abingdon has as a destination. This study utilised Hidden Britain's own Tourism Product Audit Tool. The tool covers several areas, specifically:

- Accommodation
- Food & Drink
- Visitor Sites & Attractions
- Retail & Local Producers
- Events & Activities organisers
- Promoted Routes
- Visitor information
- Transport routes & facilities
- Local government contacts & venues
- Other relevant tourism related contacts

The cataloguing of the tourism offer was a desk based exercise utilising existing databases, web resources and directories. The catchment area for inclusion was not confined to just the town centre but also included all surroundings villages and businesses within 5 miles of Abingdon, thereby capturing all the assets a visitor to Abingdon as a destination would be likely to encounter. This audit was undertaken in March 2012. See Appendix 1 for full results.

2.3.3 Mystery Visitor Assessment

An objective assessment of the visitor experience in-situ once in Abingdon, this provides an expert opinion on how Abingdon is set-up to welcome visitors. The survey used the Mystery Visitor Evaluation process, which is widely used as a 'snapshot' tool to measure how market towns appear to a visitor, who may be experiencing the town for the first time. The tool covers several areas, specifically:

- Arrival in town
- Transport facilities
- Shopping and Catering Facilities
- Mystery shopping exercise
- The Market
- Tourist/Visitor information centre
- Other facilities
- Public Toilets
- General assessment of town centre

Each area is evaluated and scored on several criteria to measure the quality of the destination and experience as a whole (e.g. the range of facilities on offer that a visitor might want to use during their visit, and the value for money that these offer, rather than evaluating one particular visitor attraction/ retail /service outlet).

This assessment was undertaken in March 2012 to ascertain how the town performs off-season when the primary focus is not on visitors and tourism. See Appendix 2 for full results.

2.3.4 External Marketing Assessment

Complementing the mystery visitor, this is an objective assessment of how Abingdon performs prior to a visit at the point where a visitor is deciding where to visit and planning how to structure that visit.

This assessment utilised Hidden Britain's own External Marketing Assessment Tool, which is designed to provide a critical, objective view of the visitor journey prior to arrival through Abingdon's external communications and marketing. The tool covers several areas, specifically:

- Performance on Search Engines
- The Destination Website
- Social Media
- Print & publications available via the website
- Third Party website content
- Identity & Message

Each area is evaluated and scored on several criteria to determine the effectiveness of how Abingdon communicates to a visitor (as opposed to other measures of effectiveness for a given tool e.g. it is less important how many third party websites Abingdon appears on than the quality of that content and whether it provides a clear link and call to action for the visitor).

This assessment was undertaken in April 2012 and updated in July 2012 to reflect the launch of the new Visit South Oxfordshire Website. See Appendix 3 for full results and a second report (requested by the Partnership) considering www.chooseabingdon.co.uk as the primary destination website.

2.3.5 Business Survey

A survey of businesses operating in the visitor economy, this provides a snapshot of economic performance, the relative contribution of visitors, the nature of the relationship of the business sector with the destination and allows businesses to identify suggestions for improvement.

For this survey **Hidden Britain** worked with **amt-i**, the commercial division of **Action for Market Towns**, to manage the collection and analysis of the survey data. This was developed as an online survey and distributed via 4 separate email campaigns direct to businesses identified through the product audit, the survey was further disseminated through the membership of Abingdon business groups. To ensure response rates businesses were also chased directly by telephone including those with no clear email address available. All activity took place between April and June 2012.

Businesses were selected to participate based on their likely involvement with visitors, the list comprised some 154 businesses and organisations including; accommodation, visitor attractions, food & beverage, event organisers, activity providers, local producers and visitor oriented retail businesses.

31 businesses completed the standard questionnaire (tailored for Abingdon) incorporating both closed and open response questions. (See Appendix 4 for full results and a sample questionnaire).

2.3.6 Visitor Survey

A survey of visitors to Abingdon, this provides an indication of the profile, motivations, behaviour, perceptions and wants and needs of visitors.

Again for this survey **Hidden Britain** worked with **amt-i**, the commercial division of **Action for Market Towns**, to manage the collection and analysis of the survey data. Interviewers from Hidden Britain, amt-i and the Choose Abingdon Partnership undertook face-to-face interviews within Abingdon town centre at specific locations. These locations were chosen for both the likely visitor flows as well as a desire to understand whether visitor profiles and behaviour differed between them. The locations chosen were:

1. Market Place
2. Abbey Park & Gardens
3. Unicorn Theatre & Abbey Buildings
4. St.Helen's Historic Quarter
5. Riverside
6. Abingdon Lock & Weir

These locations are shown on the map in figure 1 below.

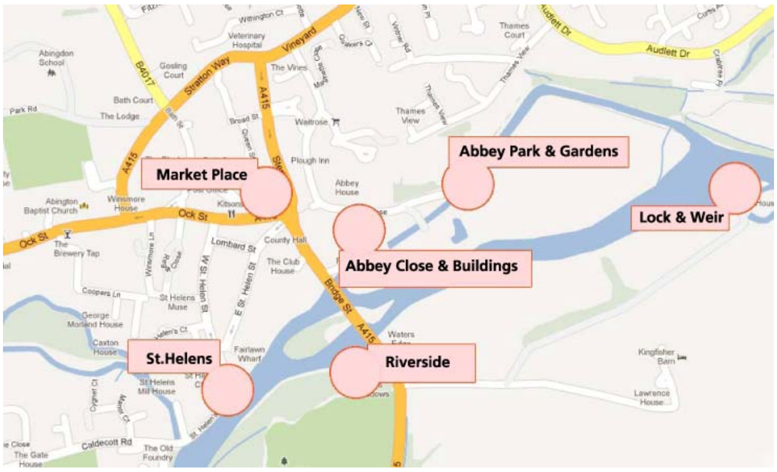

Fig.1 Map of Visitor Survey Locations

Surveys were undertaken between May and July 2012 and covered a range of days (market and non market day, weekdays and weekends) between 10:00am and 6:00pm. As far as possible peak periods (such as the Dragon Boat races) were avoided as this might have otherwise skewed the results.

Surveys were opened with a question asking if the respondent was a resident of Abingdon itself, only those answering a negative were followed on with the rest of the survey. By doing so we hoped to ensure only those visiting Abingdon were included in the survey sample as opposed to residents using the town centre.

201 individuals were surveyed with a standard questionnaire (tailored for Abingdon) incorporating both closed and open response questions. (See Appendix 6 for full results and a sample questionnaire).

A complementary online survey was also published covering the same questions to build additional quantitative responses. This survey was hosted by amt-i and published on local websites, in addition Hidden Britain promoted the story and the survey through the local Oxfordshire press and online via social media. Unfortunately this activity only generated 14 responses.

2.4 Timeframe

All research was undertaken during the period between March and July 2012. Table 1 below shows where each of the different research methodologies occurred within this timeframe.

Activity	**Mar**	**Apr**	**May**	**Jun**	**July**	**Aug**
Review Existing Research						
Tourism Product Audit						
Mystery Visitor Assessment						
External Marketing Assessment						
Business Survey						
Visitor Survey						
Reporting						

Table 1 – Timeframe for research

3. Results & Findings

3.1 Tourism Context

This section covers the assessment of Abingdon as a destination, in terms of its assets as well as what we know and understand about tourism to date within the town as well as in the wider context.

3.1.1 Tourism Product Audit

The full results of the tourism audit can be seen at Appendix 1.

a) Accommodation

Abingdon and its surrounding areas contain 55 businesses offering accommodation. More than half (57%) are classed as B&B or Serviced Guest Accommodation. The breakdown into type is shown in figure 2 below.

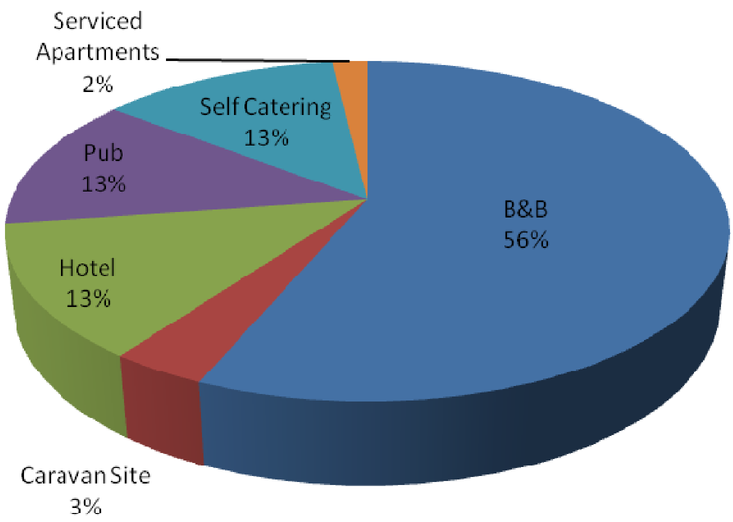

Fig. 2 Accommodation Breakdown by type

Only 10 out 55 (18.5%) have some form of official quality rating, those that do have ratings rate between 2 and 5 star with half holding 4 star status.

26 Accommodation establishments appear related to Abingdon on Trip Advisor with the average rating over all properties achieving 3.98 out of 5. The Table below summarises the relative ratings.

TripAdvisor Rating	Count	Percentage
2.5	1	4%
3	3	12%
3.5	4	15%
4	11	42%
4.5	2	8%
5	5	19%

Table 2 – TripAdvisor Ratings for Accommodation in Abingdon

The highest concentration of accommodation businesses is in Abingdon itself (35%) with the next highest amounts in OX13 (28% - Steventon & Frilford Heath) and in other OX14 postcodes (22% - Long Wittenham, Culham, Sutton Courtenay, Radley and Drayton). The Table below summarises the relative percentages.

Area or Postcode	Count	Percentage
Abingdon	19	35%
OX13	15	28%
Other OX14	13	22%
OX1	3	6%
OX11	1	2%
OX12	1	2%
OX2	1	2%
OX29	1	2%
Unknown	1	2%

Table 3 – Accommodation by Area

b) Food & Drink

Abingdon and its surrounding areas contain 64 businesses offering food & drink. The breakdown into type is shown in figure 3 below.

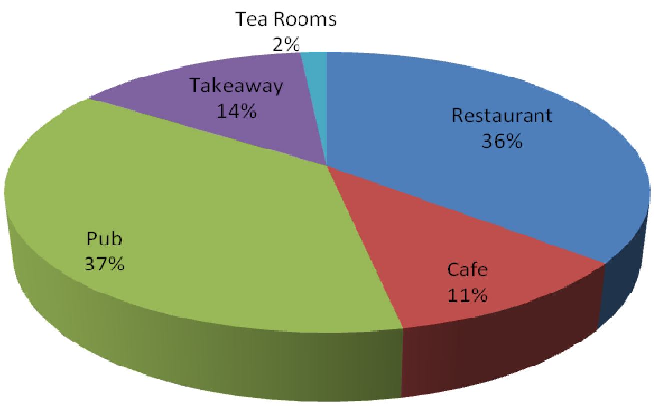

Fig.3 Food & Drink Breakdown by type

The highest concentration of food & drink businesses is in Abingdon itself (81%) with the remaining businesses in OX13 (9%) and in other OX14 postcodes (9%).

c) Visitor Attractions and Activities

Abingdon has 17 businesses or sites of interest we would consider as visitor attractions or activities (note this does not include non-visitable buildings of historic interest or non-specific natural areas), these largely break down into heritage or nature based attractions. The Table below summarises the relative types.

Type of Attraction	Count
Animal Sanctuary	1
Church	2
Equestrian	1
Farm	1
Fishing	1
Golf Course	2
Theatre	1
Museum	4
Nature Reserve	1
Swimming Pool	1
Vineyard	1
Watermill	1

Table 4 – Attraction by Type

Additionally Abingdon has 17 promoted walking routes and 3 promoted cycling routes in and around the destination. Information on all of these is available online and from various outlets in the destination.

Abingdon is also host to a varied events calendar throughout the year.

3.1.2 Conclusions

Given the size of the destination, the product audit shows a healthy accommodation sector, not only in terms of numbers of establishments but also in diversity of types. B&B and serviced guest accommodation naturally forms the largest majority as would be expected for a rural market town, but the addition of a hotel sector certainly expands Abingdon’s potential bed nights and widens the offer to multiple markets as well as business tourism.

The one area not particularly well represented within the audit is camping and caravanning sites with only 2 represented. Considering the rural nature and key elements of the draw being walking and the natural environment (as well as the presence of the Thames Path long distance route) there appears to be a gap in the market here.

Less than 20% of accommodation holds any level of formal quality grading which whilst not lower than would generally be expected in a rural market town presents an issue if Abingdon like other destinations pursues an assessed-only policy. Government policy (as per the 2010 tourism strategy) is moving away from assessed only but this has not filtered through the public sector as yet and remains an issue for destinations, not least with regard to engagement with accommodation. If Abingdon chooses an assessed-only policy efforts should be made to encourage higher take up of quality grading, alternatively Abingdon could choose to drop the policy or to develop a localised accreditation scheme (VisitEngland and DMO’s are working on guidelines for setting these up).

Despite prior perceptions voiced by the CAP the majority of accommodation providers listed on TripAdvisor are rated relatively positively, with 69% rated as 4 or higher out of 5. However there are several businesses that need to review, respond and act on the reviews and comments received to improve their rating. Further more businesses should be encouraged to list themselves on TripAdvisor (only 18 out of 55 are there currently) and to proactively use positive reviews in their own marketing (equally Abingdon as a destination can do the same via a dedicated TripAdvisor widget).

Abingdon as a destination has a very good spread of food and drink types, certainly higher in range and amount than would be expected of a similar sized market town, which represents a significant strength in terms of its offer and should be better exploited. The highest concentration of catering outlets is within Abingdon itself which is not unexpected.

Abingdon is a little lower than anticipated on what could be termed visitor attractions and activities with only 17 business or organisations providing these services. Given the nature of the destination, encouragement or development of sites and activities of visitor interest would be advantageous in the future. However Abingdon does perform very well once we add in the interpretive activities that make the most of its natural and historical features (the 20 promoted routes and the various events in particular). But this can always be expanded and built upon and work should be undertaken to ensure these activities are well publicised and the content not lost (or in the case of the promoted routes made available clearly to visitors either online in centrally organised place or visibly in situ).

Abingdon has a good mix of independent retail and local produce likely to be of interest to visitors, including several “destination” businesses (that visitors are likely to travel a distance to visit), which again is a strength of the visitor offer.

There is a lot of information available on Abingdon online, however this manifests in multiple sources with little consistency or coordination. This subject will be discussed further in the Marketing Assessment below.

Abingdon has a good provision of public transport (despite the lack of its own train station), with regular bus links to Oxford and Didcot, although other areas are less well served. One key area that is lacking is the provision of cycle hire, which again considering the natural setting, the presence of the Thames Path and relatively flat surroundings could be an opportunity to look at in future if demand is perceived to exist.

One final noteworthy point is the standard of the web presence of many of the businesses; many have no presence at all and plenty a very limited, out of date or very poor quality one. Compiling the audit was time consuming and we would suggest this would be reflected in a visitor looking to find business details for themselves. Abingdon may want to consider providing training or support to businesses to develop their web presence going forward.

3.1.3 Existing Relevant Research

There is no existing visitor research specifically on Abingdon that can be directly drawn from, however there are several other studies and pieces of research covering the Vale of White Horse as a district or neighbouring and comparable towns and destinations of interest.

The South Oxfordshire Visitor Study 2009 commissioned by South Oxfordshire District Council provides visitor insight for the towns of **Thame**, **Wallingford** and **Henley**, which between them exhibit some similar characteristics to Abingdon[3]. This study concluded amongst other things that:

- Majority of town users were aged 45 or over
- Most visits to the towns are short stays with the highest proportion staying less than one hour
- Primary reason for visit in Henley was tourism or leisure related whereas the vast majority of respondents in Thame and Wallingford were visiting for shopping.
- Very low percentages identified active marketing as influencers for visit (80% in Henley, 98% in Thame and 89% in Wallingford said their visited had been influenced either by 'no particular source of information or by a word of mouth recommendation)
- Average spend per person varies between £44 (Henley) and £17 (Wallingford)
- Three quarters of respondents (73%) enjoyed their visit to the towns

This largely indicates what we could expect to find from an Abingdon visitor sample, in that it would likely be an older demographic, staying for less than a day and spending relatively modestly. Although we can also infer that the majority of visitors are largely happy with the visitor experience encountered in an Oxfordshire market town. There was a clearly marked difference in the reasons for visit between Henley and the other two towns with Henley showing a clear leisure market whereas the other two were more functional towns based on shopping as a prime reason for visit. It will be interesting to see which way Abingdon leans in terms of its visitors market.

The close by village of **Dorchester-on-Thames** undertook a visitor survey as part of their work with Hidden Britain in 2005. The survey was conducted by Tourism South East and aimed to assess the

[3] South Oxfordshire Visitor Study 2009 - South Oxfordshire District Council

profile, demographics and behaviour of visitors to the village.[4] This study concluded amongst other things that:

- 85% of respondents were day (non-staying) visitors
- Majority of visitors (58%) were aged 45 or over
- Average length of stay was 2.1 hours
- Primary reasons for visit were given as; walking, general sightseeing, historical interest and visiting a specific attraction (altogether 66% of sample)
- 70% visited as a result of previous visit or Word of Mouth recommendation
- Day visitor spend was only £3.58 per person , for those staying overnight this jumped to £40.13
- High levels of satisfaction were found for the quality of service received, cleanliness of streets and the overall impression of the village.
- Visitors rated the overall enjoyment of their visit as high and were very likely to recommend Dorchester on Thames.
- 17% of visitors gave "using the river" as one of the activities they were planning to undertake.

Despite the age of this study and its very specific tourism focus the conclusions and findings align very similarly to those found in the 2009 study of South Oxfordshire's market towns. The dominance of older age groupings and short stay day visits is again marked, as is the overall high levels of satisfaction with the experience. Spend is markedly lower in Dorchester, but given the size and facilities of the village this is unsurprising, but still indicates that visitors to rural Oxfordshire are not spending highly (especially so as this study was prior to the economic downturn and credit crunch). Visitors to Dorchester like Henley were largely visiting for specific tourism reasons although the majority of these were not linked to a specific attraction, and again the preponderance of prior knowledge and recommendation is marked. Boat users or those visiting the river, although not a significant audience as part of the whole sample still represent a clear market for the village.

There are no other easily available visitor studies in the immediate area of Abingdon to compare, however Hidden Britain did also work with the town of **Farnham** in Surrey, which, with a population of 38,000 and a significant shopping, history and environmental offer could be considered a useful benchmark or indicator for Abingdon. As part of that work Hidden Britain commissioned a visitor survey with Tourism South East in 2006.[5] This study concluded amongst other things that:

- 83% of respondents were day (non-staying) visitors
- Overall, visitors were fairly evenly distributed between the age categories. The highest proportion of visitors fell into the 35-44, 25-34 and 45-54 age categories.
- The average length of stay for day visitors was 3.4 hours.
- 29% of all visitors were visiting an attraction in the town, 19% were visiting for the shops, 17% for general interest or sightseeing and 11% were visiting to spend time with friends or relatives

[4] Dorchester-on-Thames Visitor Report 2005 - Tourism South East
[5] Farnham visitors survey 2006 - Tourism South East

- Previous visits to Farnham and recommendation by a friend or relative were most significant in terms of influence on the decision to visit.
- Day visitors to Farnham spent an average of around £21 per person per day.
- Relatively high levels of satisfaction were found among visitors to Farnham on the various indicators which together comprise the 'visitor experience'. Most aspects were rated between 'good' and 'very good'.
- 94% indicated that they were 'likely' or 'very likely' to recommend Farnham as a place to visit.

Again the age of this study must be taken into account, but the correlations between Farnham and Henley are clear, again underlining t he differences highlighted in the 2009 South Oxfordshire Towns study between " visitor destination" towns and more traditional service centre towns. Farnham shows a rather more even spread across the age range of its visitors, possibly due to the presence of universities and colleges within the town and its average spend is fairly low in comparison to Henley.

Overall the picture from these studies is remarkably consistent , outlining what we can expect from Abingdon, i.e. an older demographic, largely short stays, little awareness of direct marketing, an average spend of between £20-£40 per day, and high levels of satisfaction in the experience and a high likelihood of recommending. It will be interesting to see whether Abingdon falls closer to Henley and Farnham in terms of the motivations for a visit as opposed to Thame and Wallingford.

In terms of economic performance there is no direct evidence in Abingdon to base solid assumptions on, although the Vale of White Horse District Council has commissioned tourism economic impact assessments for the district as a whole. The results for 2009[6] and 2010[7] are summarised below:

Economic Impact of Tourism 2009

- 259,000 trips involved an overnight stay
- 816,000 nights were spent in the District by staying visitors
- £41,512,000 was spent by staying visitors on their trip
- 3,800,000 trip involved day trips
- £136,126,000 spent by day visitors on their trip
- In total £177,638,000 was spent by all visitors on their trip
- In addition, expenditure by friends and relatives on visitors, and visitors spend on boats and second homes generated a further £9,469,000
- With the addition of other expenditure and once adjustments are made, tourism activity generated £166,991,000 expenditure
- With the addition of multiplier impacts, tourism was worth around £196.16 million in 2009
- This income supported 2,371 FTE jobs and 3,279 Actual jobs
- ONS job figures show that an estimated 4,300 jobs in The Vale of White Horse are in tourism-related sectors, which represents 8% of all employee jobs.

[6] source: "Economic impact of tourism in Vale of White Horse", 2009
[7] source: "Economic impact of tourism in Vale of White Horse", 2010

Economic Impact of Tourism 2010

- 260,000 trips involved an overnight stay
- 831,000 nights were spent in the District by staying visitors
- £41,078,000 was spent by staying visitors on their trip
- 3,876,000 trip involved day trips
- £138,849,000 spent by day visitors on their trip
- In total £179,824,000 was spent by all visitors on their trip
- In addition, expenditure by friends and relatives on visitors, and visitors spend on boats and second homes generated a further £9,337,000
- With the addition of other expenditure and once adjustments are made, tourism activity generated £167,758,000 expenditure
- With the addition of multiplier impacts, tourism was worth around £200.55 million in 2009
- This income supported 2,398 FTE jobs and 3,316 Actual jobs
- ONS job figures show that an estimated 4,100 jobs in The Vale of White Horse are in tourism-related sectors, which represents 7.5% of all employee jobs.

Clearly tourism is important to Abingdon's economy and requires steps and measures to manage it effectively, which is illustrated no better than in a business study commissioned by Vale of White Horse District Council in November 2011 on parking in Abingdon. The survey found that 60% of business respondents thought the then current charged parking situation had a negative impact on their business, yet 73% believed the new arrangement of two hours free parking would have a positive impact.

3.1.4 Wider trends

Tourism is the UK's sixth largest industry and is crucial to the local and national economy. Nationally tourism generates £97 billion of direct business for the economy each year. It is increasingly integral for economic growth, social, cultural and economic wellbeing and the tourism contribution to the economy is forecast to grow with the number of jobs directly and indirectly linked to tourism.

Despite World Travel & Tourism Council's (WTTC's) latest economic impact research showing that the global Travel & Tourism industry will grow more slowly in 2011 and 2012 than previously forecast[8], prospects for long-term growth remain strong and is echoed by VisitEngland's position that "Tourism in England is currently operating significantly below capacity but it has real growth potential. To succeed, England's tourism industry must deliver as much as it promises in the marketing – assuring visitors that they will enjoy great experiences in great destinations, with a warm welcome, world-class customer service and high accommodation standards whatever the budget. Growth in the visitor economy is dependent on a coordinated and sustainable approach by the tourism industry working with sectors responsible for infrastructure development"[9].

[8] World Travel & Tourism Council - Economic Impact of Travel & Tourism - Update November 2011
[9] England - A Strategic Framework for Tourism 2010-2020 (Revised edition 2011), - Visit England.

Tourism itself and the drivers for visitors are changing as well, in the last few years several significant trends have emerged or gained momentum. Visiting Friend and Relatives (VFR) shows continued growth as a sector with a 28% share of inbound journey purpose to the UK in 2010[10]. The 'Staycation' phenomenon in 2009, has continued to grow and holidaying at home remains a key area of interest for the domestic market. There has also been an increase of interest in 'green, sustainable or responsible' tourism amongst consumers, who are increasingly looking for authentic experiences that provide benefit to the host destination and minimise the impacts. Overseas markets traditionally relied upon are not growing as fast, or at all but new markets are emerging that can take their place. In short despite the global recession and economic woes, tourism offers plenty of opportunities for growth.

In order to support this growth VisitEngland has recently published 'A Strategic Framework for Tourism in England 2010 – 2020'. This Framework and its associated action plans are intended to provide overarching ideas and guidance on the ways in which the industry can work together to maximise tourism's contribution to the economy, employment and quality of life in England.

The role of Market Towns within the tourism landscape is under increasing scrutiny and much work and research has been undertaken in order to maximise the contribution of tourism to vibrant towns and economies. Action for Market Towns "21st Century Town Centres"[11] report concludes that:

- Development must be led by and with the local community
- Unique places are more appealing than clone towns
- Towns must be ready and willing to try out new ideas to make themselves more vibrant for residents and visitors
- Multifunctional towns are going to be the new norm – that means places where culture, leisure, learning, commerce, socialising, creativity, health and wellbeing all happen
- People must be democratically engaged in the process of creating these towns around them
- Local leadership is vital to make any real progress and they must not only understand stakeholder opinions but DO SOMETHING with them

Furthermore a study in Yorkshire and Humber concluded that "In reality, more technology hasn't given people more leisure time; in fact we're working longer hours than ever. So time off must be VERY well spent – visitors are looking for easily accessible experiences"[12]

Therefore despite the economic downturn and worries over further recessions, prospects for long-term growth in tourism remain strong, and there are specific trends within tourism growth that play very much to the strengths of market towns and rural locations. However to harness benefit from these trends, these destinations need to work cooperatively, make the choice easy for the consumer and deliver a quality experience.

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[10] Visit Britain - Inbound Tourism Facts - Updated July 2011

[11] Action for Market Towns - 21st century Town Centres report 2011

[12] Action for Market Towns - Market Towns for the Future – Yorkshire and Humber 2007

3.2 Situational Analysis

This section covers the situational assessment of the Abingdon visitor experience from an external viewpoint both before and during a visit.

3.2.1 Mystery Visitor

a) Headline findings

The full results of the Mystery Visitor Study can be seen at Appendix 2.

The overall score achieved by Abingdon was: 209 out of possible 270 = 77.41%

N.B. Possible total is 310 but reduced commensurately as a non-market day and baby change facilities not visited.

Abingdon scores well in terms of rural market towns with a score 5% above the national average for this kind of study (Market Town Average overall score = 72.9%). The following table breaks down the scores over the different aspects considered and compares Abingdon to the national average and also two other towns in Oxfordshire where mystery visitors were recently completed.

Section	Potential Maximum	Abingdon	National	Wantage	Faringdon
Arrival in town	40	36	28	37	37
Transport facilities	30	20	21	20	18
Shopping & Catering	130	99	105	111	89
Mystery Shopping	20	16	16	20	14
Tourist information centre	10	9	4	9	9
Other Facilities	20	18	13	19	16
Toilets	10	3	7	9	6
General Assessment	10	8	7	9	8
Total	270	209	201	234	197

Table 6 – Mystery Visit score comparisons by section

Overall the experience of visiting Abingdon was very positive with the following standing out as praiseworthy:

1. Town was clean & tidy, with clear efforts made to maintain appearance
2. Good welcome and level of customer service (some areas for improvement though)
3. Good level of service and information available in TIC and well signed
4. Selection of literature within TIC largely locally focussed
5. Variety and quality of shops and catering outlets

However there were some areas where Abingdon did not do so well with the following requiring specific attention:

1. Toilets in very poor condition
2. High relative proportion of vacant shops in key areas
3. Signage pointing in wrong direction
4. Questionable location of map boards.
5. Literature available on the town was confused and duplicated itself
6. Lack of Sunday or evening opening for many of the retail outlets

b) Conclusions

Clearly going forward Abingdon should be looking to maintain and improve on its strengths and where possible addressing some of the issues highlighted as weaknesses.

Given the importance of repeat business and word of mouth to rural town destinations Abingdon should certainly look to improve and maintain the levels of customer service and welcome towards customers and visitors. This could manifest itself in additional training opportunities for business staff, setting up a local awards scheme to reward excellence or highlighting specific examples regularly through PR and marketing.

The public toilets issue should be addressed as a key priority, these facilities are key to the visitor experience, and a poor experience is likely to be a memorable one even if the rest of the visit has been positive. In essence the details do matter - "Sense of destination – the extent to which it has met a visitor's needs and made a strong and positive impression – is therefore vital to secure repeat trade and sustainable economic development."[13]

In tandem with toilets is the upkeep of the public realm. Abingdon scored very highly for the physical appearance of the town, its buildings, green space and street furniture, and this should be maintained going forward as it again it is an important detail that impacts on the visitor experience.

Whilst there have been big improvements to the signage and interpretation in Abingdon over the last few years, there are a few issues still extant with the positioning of some and the absence of others in key areas. A full audit of directional and interpretative signage would be useful to identify the key areas requiring attention.

The provision of car parking and the signage to them was in general very good; however there is some question around the charging policy. The current 2 hours free parking is a great asset but it does look towards promoting short shopping trips only. If Abingdon wants to focus on visitors staying for half a day at least they could consider extending this to 3 hours thereby giving enough time for a visit and a meal.

[13] Improving Public Access to Better Quality Toilets - A Strategic Guide (Department for Communities and Local Government 2008)

Service at the Tourist Information Centre was exemplary, and should be recognised and clearly maintained at the same high standard; however the range of publications available is confusingly large with multiple instances of duplication. Going forward Abingdon should look at auditing the full range of publications on the destination and where possible develop clear style and form guidelines as well as streamlining the selection to make things simpler for the visitor.

3.2.2 Marketing assessment

a) Headline findings

The full results of the Marketing Assessment can be seen at Appendix 3.

The overall score achieved by Abingdon was: 122 out of possible 310 = 39.35%

Abingdon scores poorly in terms of rural market towns with a score 25% below the average for this kind of study (Market Town Average overall score = 65.8%). The following table breaks down the scores over the different aspects considered and compares Abingdon to the national average and also two other towns in Oxfordshire where marketing assessments were recently completed.

Section	Potential Maximum	Abingdon	National	Wantage	Faringdon
Search engine performance	30	17	22	27	24
Destination website	90	43	68	75	61
Social Media	20	12	14	13	8
Print Publications	20	9	14	0	10
Third Party Websites	30	17	19	12	14
Identity & Message	120	24	67	33	12
Total	310	122	204	160	129

Table 7 – Marketing Assessment score comparisons by section

Whilst Abingdon did perform poorly on this study it should be stressed that few destinations do effectively market themselves (hence the low average score of 65.8), and there were some positive areas for the destination's external presence:

1. On a search information is easy to find and presented across several sites
2. Good use of imagery in general
3. Social Media presence is good and well used.
4. Content on third party sites generally good and mostly consistent.

However Abingdon does have some serious deficiencies in the way it presents itself as a destination to people who have yet to visit:

1. No evidence of development of, or consistent usage of a visual style or identity
2. Confused and generic attempts at conveying the destination

3. Confused web presence with multiple sites showing similar or duplicate content
4. Content and navigation on www.abingdon.gov.uk badly organised and repetitive
5. Social media presence does not link together nor link effectively with primary visitor website
6. Print Publications not designed well for the visitor and missing key information
7. Virtual tour at www.abingdonvue.co.uk/ contributes very little
8. Very little consistency across stakeholder websites or evidence of interlinking

As requested we took a second look at Abingdon basing the marketing review around the performance of the Choose Abingdon Website (www.chooseabingdon.co.uk) as the main destination website. This resulted in an overall score for Abingdon of: 99 out of possible 310 = 31.9% (7.5% less). The comparison on sections between the two can be seen in the following table:

Section	Potential Maximum	Abingdon	Choose Abingdon
Search engine performance	30	17	10
Destination website	90	43	39
Social Media	20	12	12
Print Publications	20	9	2
Third Party Websites	30	17	8
Identity & Message	120	24	28
Total	310	122	99

Table 8 – Marketing Assessment score comparison between Abingdon and revised using www.chooseabingdon.co.uk

Utilising the Choose Abingdon website we identified the following strengths of the marketing offer:

1. Well designed and visually attractive website
2. Social Media presence is good and well used.
3. Makings of a strong visual identity and brand
4. Really strong focus on events and great information on them
5. Good visibility of the destination on 3PP websites

The revised study also outlined the following key deficiencies:

1. Choose Abingdon rates poorly in comparison to other Abingdon sites on Google
2. Minimal and generic attempts at articulating why someone should visit the destination
3. Simply not enough visitor information is provided and at present only a minimal part of the offer
4. Visitor info provided as downloads, but with broken links!
5. Issues with size of downloaded files
6. Issues with usability of business directory
7. Social media presence does not link effectively with website, and do not show any consistent branding or imagery.
8. Little reciprocal activity from others

b) Conclusions

It's clear that despite some good work and effort in certain areas there are particular issues with Abingdon's marketing and communications and in particular how it presents itself to the outside world. Overall the message is fragmented, inconsistent and unclear, and this in a difficult market where any number of destinations are trying to attract the same visitors and compete for their attention and spend. Destinations need to stand out from the crowd and just as importantly make it easy for the visitor to understand why they should come and what the experience will give them.

Currently, Abingdon does not present a clear and consistent offer or identity to the visitor, there is no consensus about what the destination has to offer, what an experience there consists of and chiefly why a visitor would want to come. Various sources mention facts such as; its proximity to London and Oxford, its numerous historic buildings, its setting on the river and whilst they are factually true they do not tell a compelling story that in our opinion would inspire a visitor to choose Abingdon over another market town destination. We would suggest some work needs to be done to define what Abingdon is, what it as a destination wants to achieve and who it wants to reach, and once developed to encourage the usage of these core messages consistently across its consumer facing activities.

Abingdon also suffers from a multitude of voices all saying slightly different things. There are multiple websites, social media presences and publications all in essence competing with one another to grab the visitor's attention, where what visitors really need is a; simple straightforward, clear and enticing point of contact with the destination. There is work that needs to be done in selecting which web presence will be the leading one for visitors and encouraging others to support and promote that one, as well as dealing with the other competing "official" sites that muddy the waters for visitors.

Whichever site is chosen, be that www.abingdon.gov.uk, www.chooseabingdon.co.uk or a new site altogether, there needs to significant work on the content and user experience on the site. The web is increasingly the first contact visitors will have with the destination, so the primary site must; entice, inform and be relevant and useable for the potential visitor and both the sites looked at have deficiencies in that regard.

Abingdon does however have an active, well used and supported social media presence both on "official" channels but also within audience and community led channels and groups that promote various aspects of Abingdon and its surroundings. This all compounds to a buzz on social media for the destination and a very useful platform for communicating news, offers, new experiences or inviting shared content with an aim of promotion. However there is plenty of scope for expanding the "official" destination channels, certainly into areas such as images (using Facebook but also dedicated tools such as Flickr, Instagram, Picasa or Pinterest) , and especially video (a fantastic medium for conveying the experiences a visitor can have in Abingdon – particularly using tools like Youtube and Vimeo), as well as developing and implementing links, both between tools and platforms but chiefly back to and from the main destination website.

As mentioned in the Mystery visitor study, there is an issue with the range, duplication and confusing array of publications available. This needs to be slimmed down and made more focussed (and by doing so simpler for the visitor), in addition these publications should be easily available on the main website thereby providing the online one-stop shop for visitors looking for the key information.

There is also a disconnect between what the "official" channels say about Abingdon as a destination and what the businesses, organisations and other consumer facing stakeholders are communicating. Work should be done behind the scenes to encourage a consistent approach, with the core messages being used throughout and if possible the development of common stylist elements that can begin to build recognition in visitor's minds.

Whilst the majority of the conclusions and recommendations above focus on the activities that Abingdon creates and controls, we should also be aware of what others say about us, how they portray us and whether they are doing so in the way we want. There is plenty of third party information on Abingdon on numerous websites and other media, some is good but much is poor or certainly could be improved and to do so Abingdon should be; monitoring what others say, developing the content itself and making it easy for third parties to say the things we want them to.

Overall the key message underlying the marketing should be about making it easy for the visitor to become aware of, choose to visit, structure and plan a visit to the destination, which at present is somewhat difficult to do.

3.2.3 Overall Conclusion

Whilst it is clear from the above that there are difficulties with the marketing and promotion of Abingdon, we should offset this against the positive experience of an actual visit. We can consider that Abingdon is underperforming on expectation but certainly delivering on experience. This is a position of strength to build from and is certainly more advantageous than the reverse and it is therefore consequently easier to address the key issues.

3.3 Business Survey

This section deals with the findings and interpretation of the survey of Abingdon's businesses.

The full results of the Business Survey can be seen at Appendix 4 and any cross reference data results can be seen at Appendix 5

3.3.1 Headline Findings

a) Nature of business

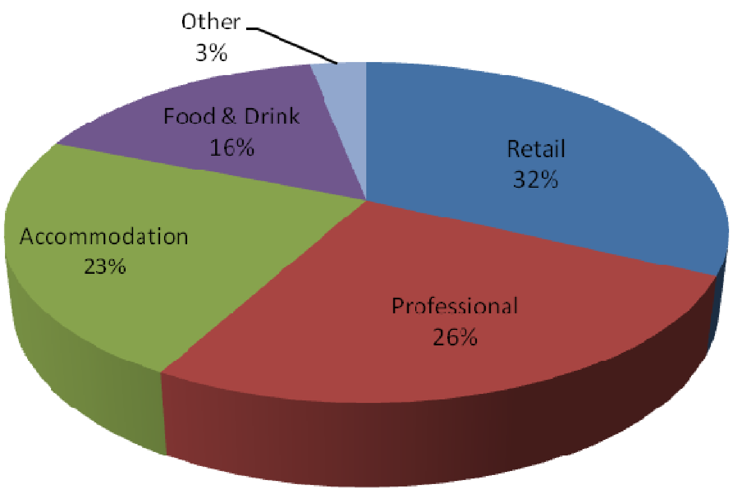

Fig.4 Business Breakdown by type

Of the businesses that responded to the survey, the highest proportion was retailers (32%) , followed by professional (26%), then accommodation (23%) and then food & drink (16%). No businesses described themselves as "visitor attractions" or "activity providers".

b) Importance of Tourism & Visitor spend

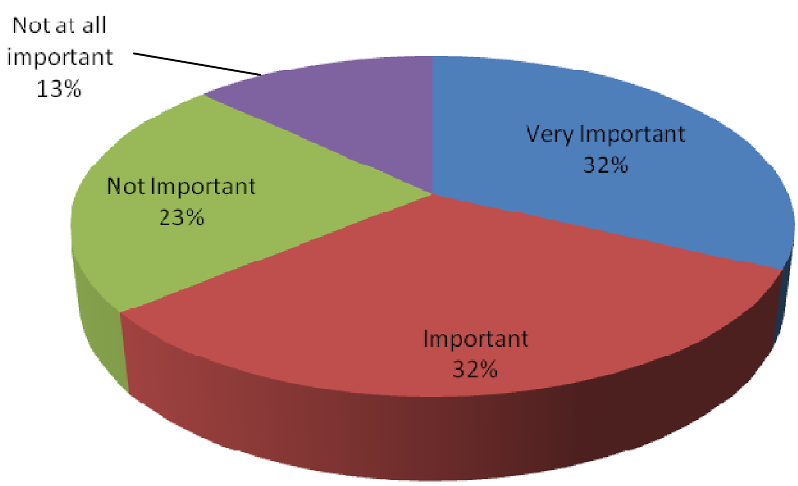

Fig.5 Importance of tourism to businesses

64% of those surveyed indicated that 'Tourism and Visitor spend' was either 'Very Important' (32%) or 'Important' (32%) to their business.

Cross-referencing the above we can outline how each sector of business views the importance of tourism in the following figure:

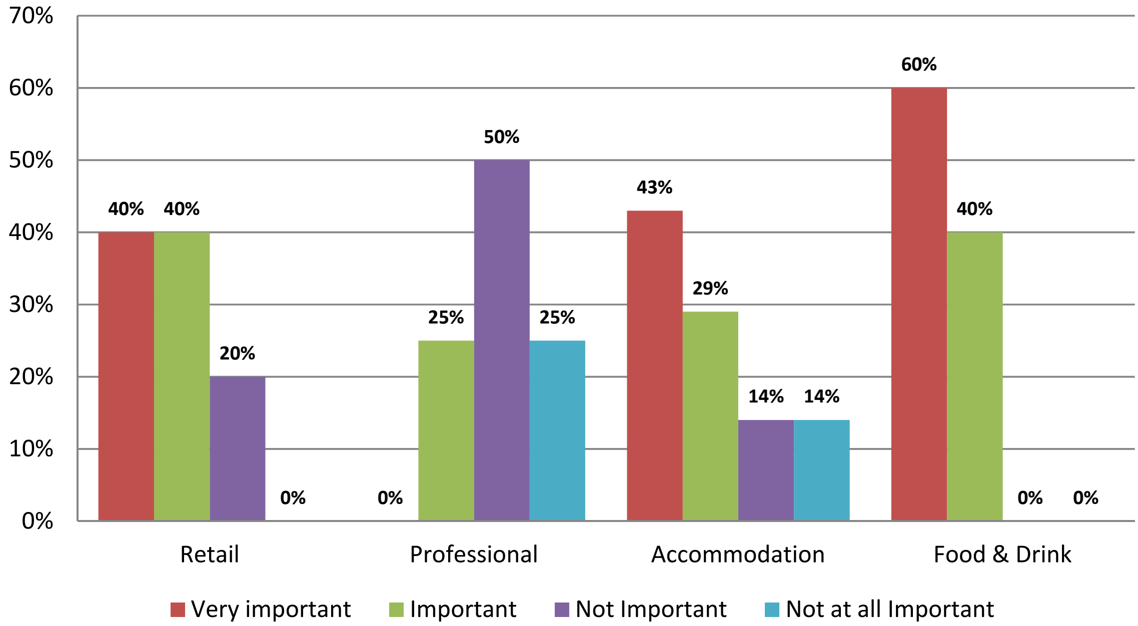

Fig.6 Importance of tourism to businesses by business type

80% of retail, 72% of accommodation and 100% of food & drink businesses rated visitor spend as either "important" or "very important".

c) How do your customers hear about you?

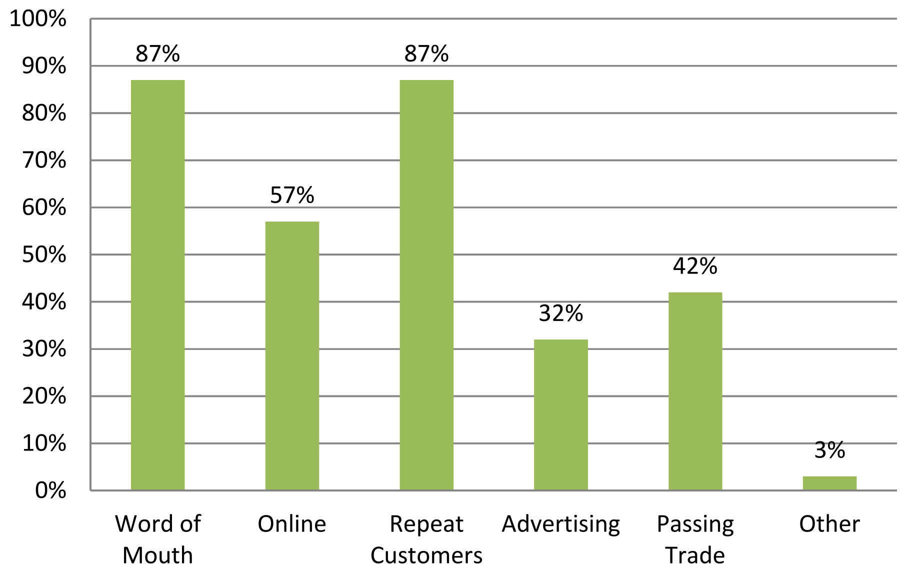

Fig.7 How customers heard about the business

Respondents were asked to provide the top three methods for their customers finding out about their business, 87% stated it was ‘Word of Mouth’, 87% ‘Repeat Customers’ and 57% ‘Online.’ This shows that the businesses thought their customers were responding more than twice as often to “passive” marketing (WoM, repeat business and passing trade) as they were to more “active” marketing on their part.

Cross tabulating this data against the type of business we can assess the relative importance of each method to the type of business, as shown in the figure below:

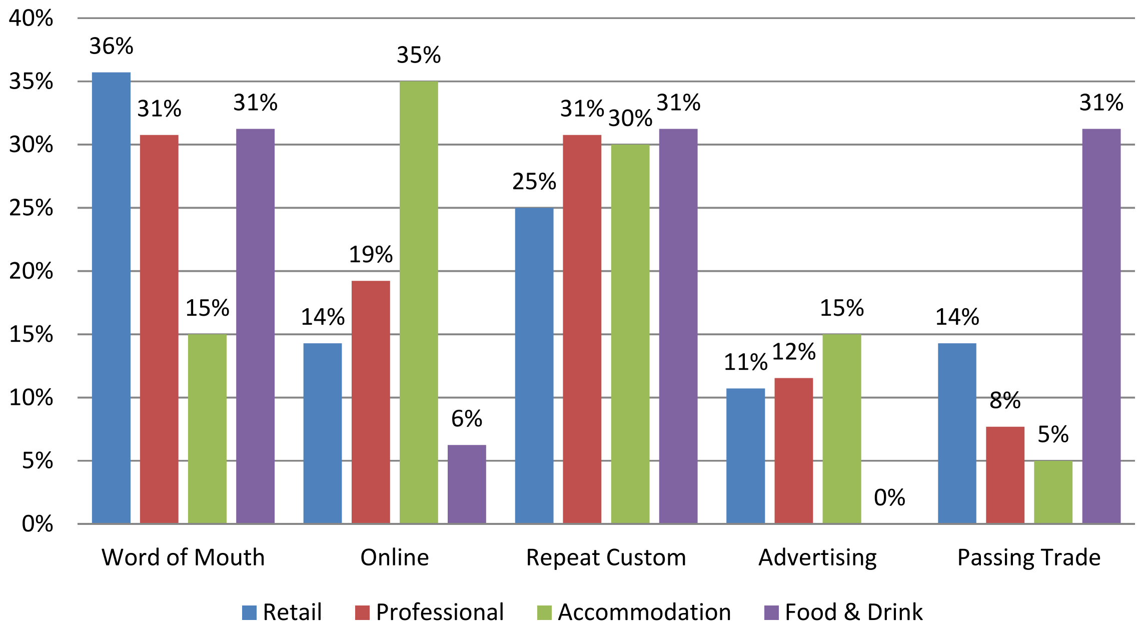

Fig.8 How customers heard about the business by business type

Retail described Word of Mouth (36%) and Repeat Customers (25%) as their most popular marketing tools. Professional described Word of Mouth (31%) and Repeat Custom (31%) with Online (19%) coming third. Accommodation described Online (35%) and Repeat Custom (30%) with advertising and WoM coming third (15% each). Food & Drink showed strongly for WoM, Repeat Custom & passing Trade (31% each).

d) Average customer spend at business

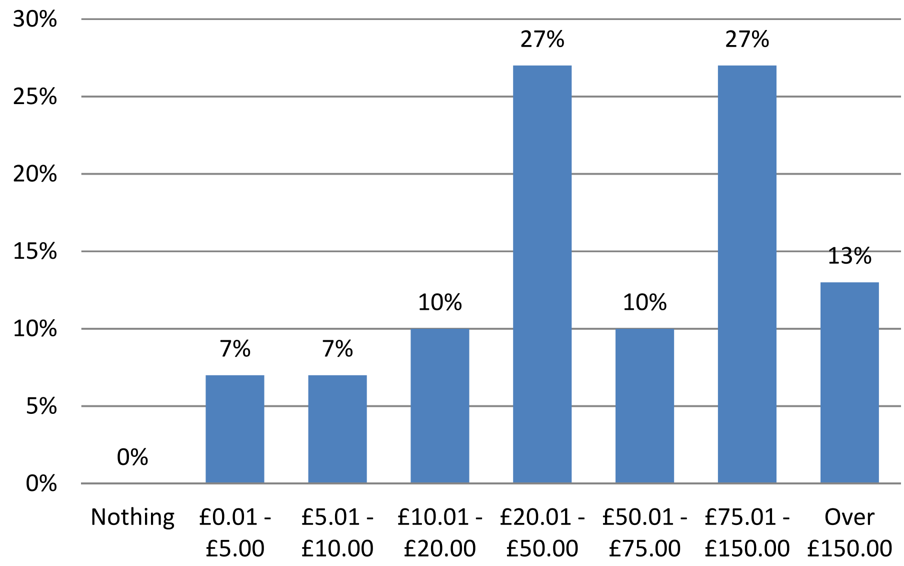

Fig.9 Average spend per customer at business

77% of the Businesses surveyed reported that 'one customer on a visit' would spend over '£20.01'. 27% of this cohort reported that the consumer would spend between £75.01-£150.00'.

On cross tabulating average customer spend showed a spread across the relative importance of tourism, there were no significant trends to be drawn here.

e) Business Performance

We asked three questions of the business to ascertain their relative performance over the last 12 month period and their confidence in the succeeding 12 month period.

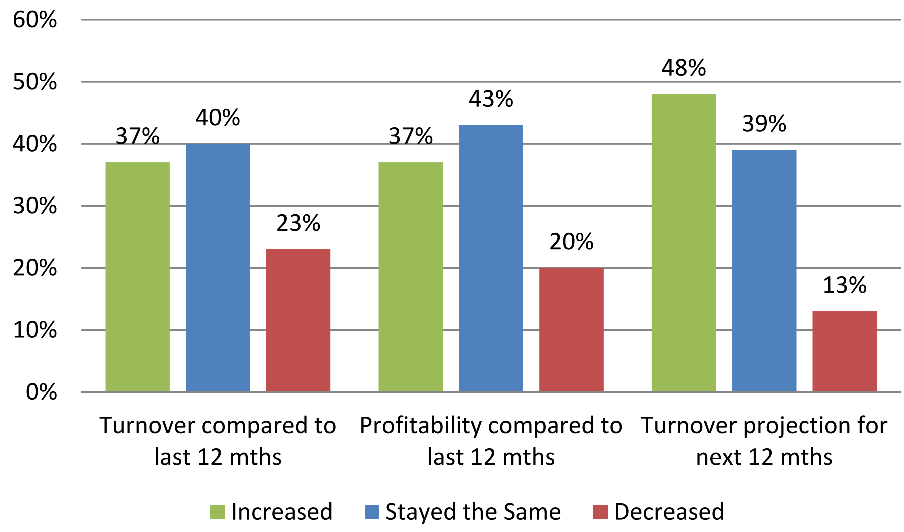

Fig.10 Business Performance & Confidence

77% of the Businesses reported that compared to last year their 'Turnover' had 'Stayed the same' or 'Increased'. 80% of Businesses stated that compared to last year 'Profitability' had 'Stayed the same' or 'Increased'. 87% of Businesses reported that over the next 12 months they thought that their 'Turnover' would 'Increase' or 'Stay the same'.

Cross tabulating 'Turnover' compared to previous 12 months against 'Turnover' projection for the next 12 months allows us to assess whether business confidence is based solely on previous results or other factors. Results are summarised in the figure below:

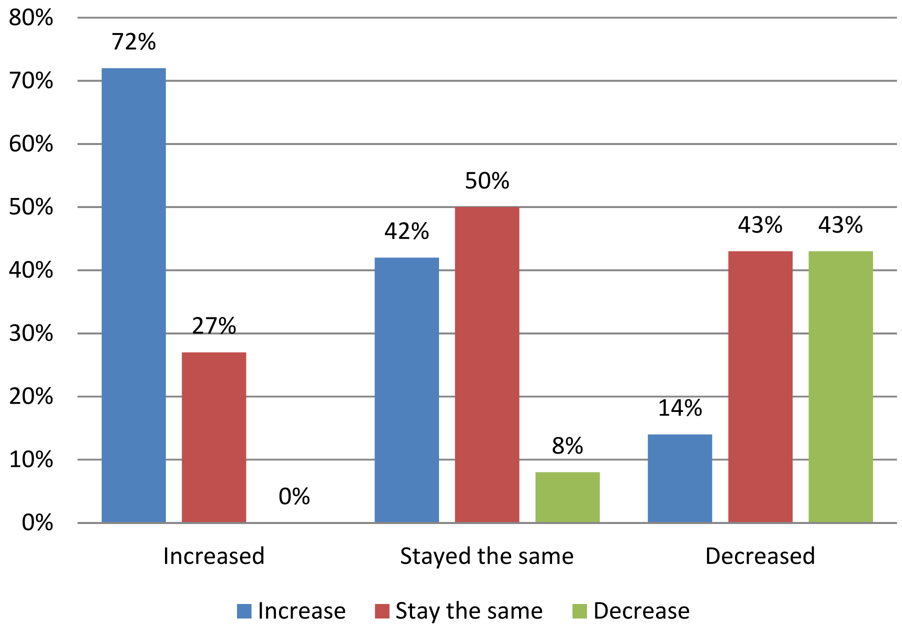

Fig.11 Business Performance against Confidence

72% of those who claimed their turnover had increased in comparison to preceding 12 months were confident it would increase again in the next 12, or at least stay the same (27%). Those who had seen no increase in the last 12 months had a more even spread of expectation, although still largely positive (42% increase and 50% stay the same). Whereas those who saw a decrease were largely split that it would continue to decrease (43%) or not change (43%).

f) Occupancy Rates at Accommodation Providers

Of the 7 Accommodation providers who responded to the survey:

2 reported that their occupancy rate had been between 31-40% over the last 12 months.
1 reported that their occupancy rate had been between 51-60% over the last 12 months.
3 reported that their occupancy rate had been between 71-80% over the last 12 months.
1 reported that their occupancy rate had been between 81-90% over the last 12 months.

Due to the low numbers participating in the survey we cannot realistically draw relevant trends from this data, however it does show that some accommodation businesses in Abingdon are thriving whereas others appear to be finding business much more difficult to come by.

g) Perceptions of Abingdon as a place to do business

Respondents were asked to pick any particular features of Abingdon that they thought were either a positive or a negative aspect of having a business in town. Results are summarised in the tables below:

Positive aspects	%
Potential local customers	73%
Prosperity of the town	53%
Geographical location	53%
Potential tourist customers	47%
Environment	40%
Car Parking availability	37%
Transport links	33%
Links to the science community	30%
Car Parking Price	30%
Business Support and Networks	27%
Being located on the River	23%
Rental Values/ Property Costs	23%
Mix of Retail Offer	20%
Other	13%

Table 9 – Positive aspects of having a business in Abingdon

Negative aspects	%
Car Parking Price	44%
Rental Values/ Property Costs	41%
Prosperity of the Town	33%
Car Parking Availability	33%
Competition from Other Places	33%
Mix of Retail Offer	30%
Competition from Internet	26%
Transport Links	15%
Local Business Competition	15%
Environment	11%
Other	11%
Potential Tourist Customers	4%
Business Support and Networks	0%
Geographical Location	0%
Potential Local Customers	0%

Table 10 – Negative aspects of having a business in Abingdon

73% of Businesses felt that ‘Potential Local Customers’ was a ‘Positive’ aspect of operating in Abingdon, whilst 53% stated ‘Prosperity of the Town’ and the same figure ‘Geographical Location’. 47% of Businesses noted ‘Potential Tourist Customers’ as a ‘Positive’. 44% of Businesses recorded ‘Car Parking Price’ as a ‘Negative’ aspect of operating in Abingdon (an interesting difference from the sample in the Vale of White Horse survey in 2011) and 41% ‘Rental Values and Property Costs’.

h) Awareness of the Choose Abingdon Partnership

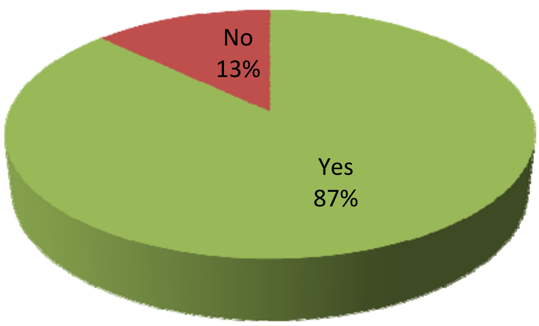

Fig.12 Are you aware of the Choose Abingdon Partnership?