87% of respondents were 'Aware of the Choose Abingdon Partnership'.

Cross tabulating the results against Nature of Business allows us to understand whether Awareness of the Partnership is consistent across all sectors or where certain sectors are less aware. Results are summarised below:

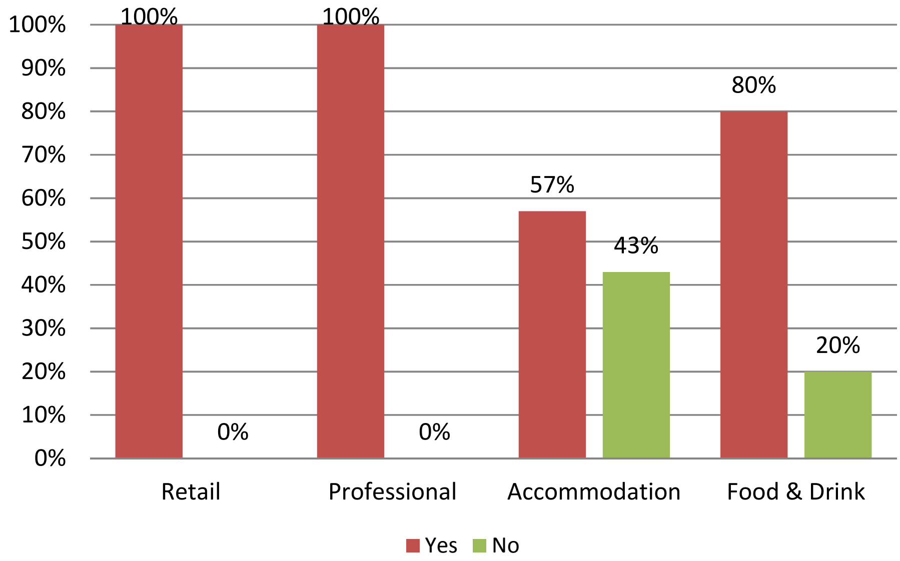

Fig.13 Awareness of the Choose Abingdon Partnership against Type of Business

100% of Retail and Professional businesses were aware of the Choose Abingdon Partnership. However only 57% of accommodation and 80% of Food & Drink businesses were aware, indicating awareness of the Choose Abingdon Partnership is not consistent across all sectors.

i) Suggestions to improve Abingdon's Economy

A number of 'themes' emerged from the qualitative analysis of the comments supplied by Businesses in regards to what improvements they would like to see made in Abingdon. Full responses are included in Appendix 4 but the key themes are summarised below.

1. **'Car Parking and Traffic'** was a common theme to emerge from the suggestions. These comments focussed largely on lowering the costs or changing the payment models for parking to encourage more footfall for business, but also included several requests for improved traffic flows in town and actions to reduce congestion at peak periods.
2. **'Promotion, Advertising & Marketing'** was another theme to emerge from the suggestions. These comments were more widely focussed featuring requests for; better advertising and marketing for the town, making more use of historical assets, more events, encouraging the community to get more involved and use the town more often, improvements to maps and websites, and please for better partnership working.
3. **'Business Rates and Incentives'** were cited in both the question on 'Negative aspects of Abingdon' and in the suggestions for improvement. These comments focussed exclusively on reductions to rents and rates, with the aims of making the town more appealing to new and smaller businesses and also to encourage occupancy of empty premises.
4. **'Physical Redevelopment of the town and infrastructure'** was also mentioned. These comments focussed largely on the precinct redevelopment but also mentioned the Old Gaol and Charter development, with the aspiration that all would be completed soon and have a positive impact on the town.

3.3.2 Comparisons with Other Towns

Utilising the Action for Market Towns Benchmarking Dataset and Hidden Britain's own Business Survey Datasets we can analyse several of the Abingdon results against national averages.

a) Instances of Crime in last 12 months

Has your business suffered from any crime over the last 12 months?	Abingdon %	National Large Towns %	National Small Towns %
Yes	27	34	31
No	73	66	69
What type of crime has your business suffered over the last 12 months (Multiselect)	Abingdon %	National Large Towns %	National Small Towns %
Theft	75	80	63
Abuse	0	16	15
criminal damage	25	30	46
Other	0	2	5

Table 11 – Business Suffering Crime in Abingdon against National Market Town Averages
(Source – Action for Market Towns Town benchmarking Dataset 2011)

The comparison table above shows that Abingdon's businesses are well below the national averages for both Large Towns and Small Towns for suffering crime over the last 12 months. In terms of actual crime suffered Abingdon showed an almost average proportion of theft but lower proportions of both Abuse and Criminal Damage.

b) Perceptions of the Town as a place to do business

What are the positive aspects of having a business located in the town? (Multiselect)	Abingdon%	National Large Towns %	National Small Towns %
Prosperity of the town	53	44	38
Labour pool	0	12	9
Environment	40	23	20
Geographical location	53	47	43
Mix of retail offer	20	40	32
Potential tourist customers	47	28	26
Potential local customers	73	72	73
Affordable housing	0	7	9
Transport links	33	35	30
Car parking	67	25	31
Rental values/property costs	23	13	18
Other	13	7	3

Table 12 – Positive Aspects of having a business in Abingdon against National Market Town Averages
(Source – Action for Market Towns Town benchmarking Dataset 2011)

In several ways the aspects Abingdon's businesses rated as particularly positive about the town correlate well with those seen in other towns nationally; 'potential of local custom' and 'transport links' in particular correlate well. Abingdon's businesses see several aspects more positively than the national average; 'prosperity'(53%), ' Environment'(40%), 'Geographical Location'(53%), 'potential tourist customers'(73%) and 'car parking'(67%), were all rated higher than average for other towns. There were also some aspects that Abingdon's businesses deemed less positive or noteworthy in comparison to other towns, particularly; 'affordable housing', 'mix of retail offer' and labour pool.

What are the negative aspects of having a business located in the town? (Multiselect)	Abingdon %	National Large Towns %	National Small Towns %
Prosperity of the town	33	19	25
Labour pool	0	7	6
Environment	11	8	8
Geographical location	0	7	7
Mix of retail offer	30	16	25

Potential tourist customers	4	9	11
Potential local customers	0	2	4
Affordable housing	0	12	8
Transport links	15	6	10
Car parking	77	64	58
Rental values/property costs	41	48	32
Local business competition	15	24	20
Competition from other places	33	32	34
Competition from the Internet	26	38	30
Other	11	4	4

Table 13 – Negative Aspects of having a business in Abingdon against National Market Town Averages
(Source – Action for Market Towns Town benchmarking Dataset 2011)

Of the aspects Abingdon's businesses identified as particular negatives, 'mix of retail offer'(30%), 'transport links'(15%) and 'car parking'(77%) were all rated higher than the average seen in other towns.

c) Business Performance & Confidence

Compared to last 12 months has your turnover?	Abingdon %	South East %
Increased	37	44
Stayed the Same	40	33
Decreased	23	22
Over the next 12 months do you think your turnover will?	Abingdon %	South East %
Increase	48	63
Stay the Same	39	24
Decrease	13	13

Table 14 – Business Performance & Measures of confidence against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Compared to the South East, businesses in Abingdon performed almost exactly on average in terms of turnover performance compared to the previous year. The slight slip from increased to stayed the same is likely a symptom of economic conditions since 2011 when the comparison dataset was compiled. This trend towards less positive results also continues in the confidence for the next 12 months with Abingdon showing less 'increase' responses but more cautious optimism, in that the economy will 'stay the same'.

3.3.3 Conclusions

As can been seen from the data it was primarily retail and professional (i.e. non-tourism) businesses who responded. These businesses were, given their type, likely to be located within Abingdon as opposed to its hinterland, therefore on both counts we should be wary of drawing definitive conclusions based on these results.

However in saying that, the cross section of businesses who did respond considered tourism to be highly important to the local economy , with 64% stating it was 'important' or 'very important'. This breaks down interestingly across business type however with 100% of catering businesses, 80% of retail but only 72% of accommodation rating tourism as important or very important. This would tend to indicate a fairly strong business or corporate tourism base within Abingdon and its surrounding area. Further research with accommodation providers would be useful to understand this groupings relative importance (particularly as they are a group unlikely to appear on a standard visitor survey of town users).

In a further note on accommodation, the numbers responding were too low to be able to really draw any solid conclusions regarding their performance and the state of the overnight market. Occupancy rates varied and it would be useful to conduct further and systematic research with the accommodation sector in future to track occupancy and customer breakdown in a more efficient way.

'Passive' forms of marketing appear to dominate businesses perception of how their customers found them, with very low responses for anything approaching advertising, publications or media. The accommodation and professional sectors were the only ones who identified 'online' as having any significant impact on their business. This likely indicates either that Abingdon's businesses are largely serving an established customer base who evangelises on their behalf, with new business mainly finding them by accident, or that there is a gap between reality and perception for the businesses. Further research here would be useful.

Average spend at business is relatively high (77% over £20), indicating customers in Abingdon are making multiple or significant purchases in the relative businesses. Of those with over £20 spent per customer, 40% reported average spend of £75 or higher, although this was probably driven largely by the accommodation sector.

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 and not just from those who saw business increase the previous year, those who had seen last year provide neither increase or decrease still were largely positive about future outlook.

It is clear from the responses that Abingdon's businesses value similar assets to Abingdon's visitors, i.e. its environment, location and the availability of said tourist customers. However it is also clear that

Abingdon's businesses perceive or rely on local customers further and look toward the local residents to support and sustain the businesses. In terms of negative perceptions there is a dichotomy over car parking with many rating it positively as well as negatively, based on comments to the open question we can conclude the availability of parking is more positive than the perceived costs of parking (despite the 2 free hours) that are seen as clearly a negative. Regardless car parking remains a divisive issue. Further concerns over costs of rates and rents as well as competition from other areas and online are seen as negative aspects of trading in the town. However in comparison to other towns Abingdon's businesses do not perceive some issues to be as much of a problem, particularly those related to economic prosperity of the town as a whole, which is therefore encouraging.

Awareness of The Choose Abingdon Partnership was overall very high, and certainly higher than we would expect for a community partnership (this assertion based on anecdotal evidence and experience by Hidden Britain). This is very encouraging for developing of future work and activities as well as making it easier to engage with the private sector. However there were marked reductions in awareness for several sectors, most notable accommodation and catering. These are therefore sectors the partnership should make specific efforts to engage with going forward. In addition we would also assert that these businesses are perhaps now located exclusively in the town centre and therefore the focus of the partnership should not just been on the sectors but also to extend its geographical remit to encompass a wider destination area as well.

Crime in Abingdon is lower than national averages and is largely restricted to theft as opposed to criminal damage or more serious crimes.

3.4 Visitor Survey

This section deals with the findings and interpretation of the face-to-face survey of Abingdon's visitors.

The full results of the Visitor Survey can be seen at Appendix 6 and any cross reference data results can be seen at Appendix 7.

3.4.1 Headline Findings

a) Age profile of visitors

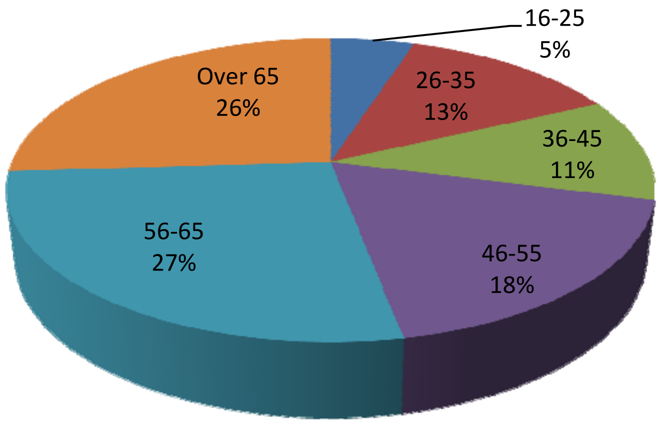

Fig.14 Age profile of visitors to Abingdon

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

b) Visitors origin

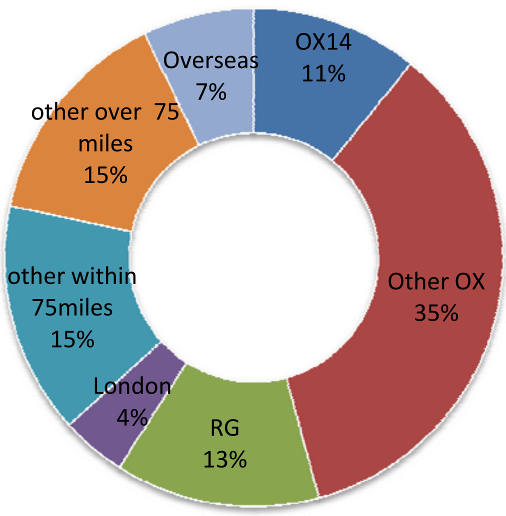

Fig.14 Origin of visitors to Abingdon

46% of visitors come from within Oxfordshire, and a total of 88% travelled less than 75 miles to reach Abingdon. London figures surprisingly low in terms of visitors (4%), however there is a healthy proportion of overseas visitors (7%).

c) Party Composition

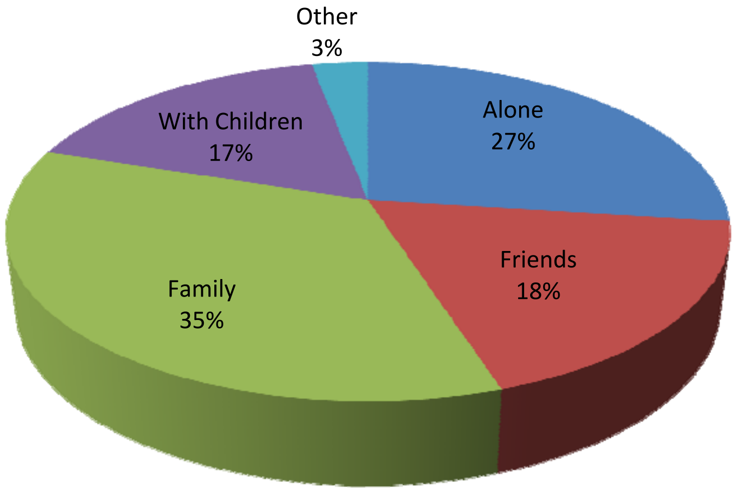

Fig.14 Origin of visitors to Abingdon

35% of those interviewed were travelling 'With Family' (Without Children) and 27% 'Individually.' Less than one fifth of visitors to Abingdon had travelled with children (17%). The highest proportion of visitors was therefore adult couple or adults travelling with other adult family members.

d) Mode of transport

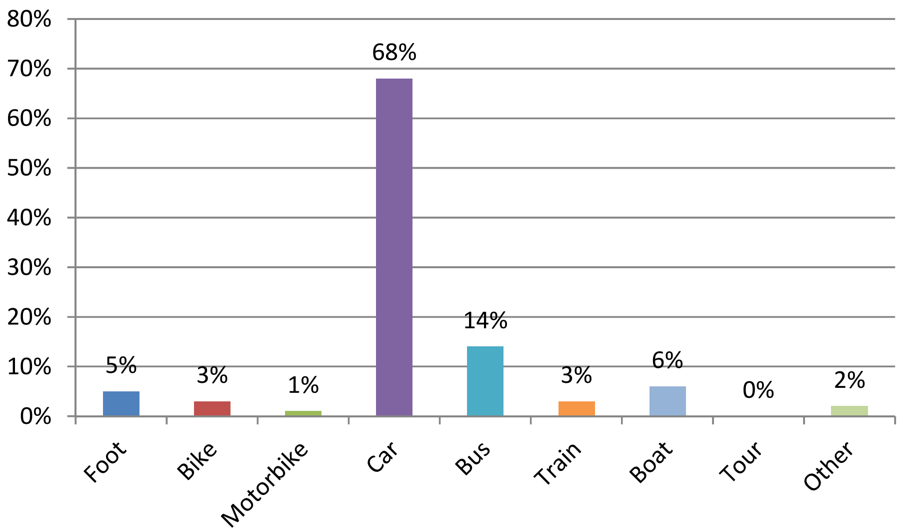

Fig.15 Mode of transport used by visitors to Abingdon

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

e) Main Purpose of Visit

What is the main purpose of your visit to Abingdon?	%
Visiting a tourist attraction	19%
Visiting friends and relatives	17%
Attending an event	15%
Short walk or easy outdoor activity	8%
Convenience Shopping	6%
Market	5%
Using the River	5%
On Business	4%
Long or intensive outdoor activity	4%
Other	4%
Comparison Shopping - e.g. clothes	3%
Eating out	3%
Access Services e.g. Bank and Library	3%
Work	3%

Table 15 – Main purpose of visit to Abingdon

Highest responses received 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 tourism purposes as opposed to more everyday service uses. Interestingly ratings for ‘eating out’, ‘comparison shopping’ and to a lesser extent ‘short walk’ all appeared very low implying these were clearly not primary drivers for a visit amongst the sample.

Cross tabulating the main reason for visit against the mode of transport allows us to test whether those arriving by certain modes of transport are predisposed to certain motivations for visiting. Results are show in the figure below:

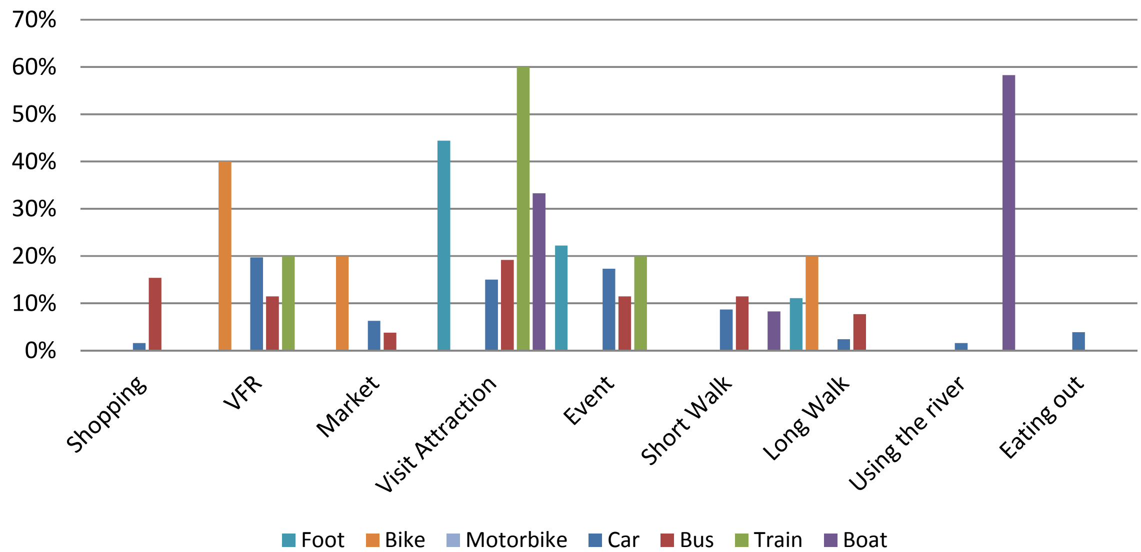

Fig.16 Main reason for visit against mode of transport

Car is the most dominant form of transport by far and shows significant numbers in each category. However it is also clear that River Users were predominately arriving by boat, and that those arriving by train were arriving for a specific leisure reason (Attraction or Event).
Interestingly a high number of respondents were visiting Friends and Relatives by bike.

f) Influencing factors for choosing Abingdon for main activity

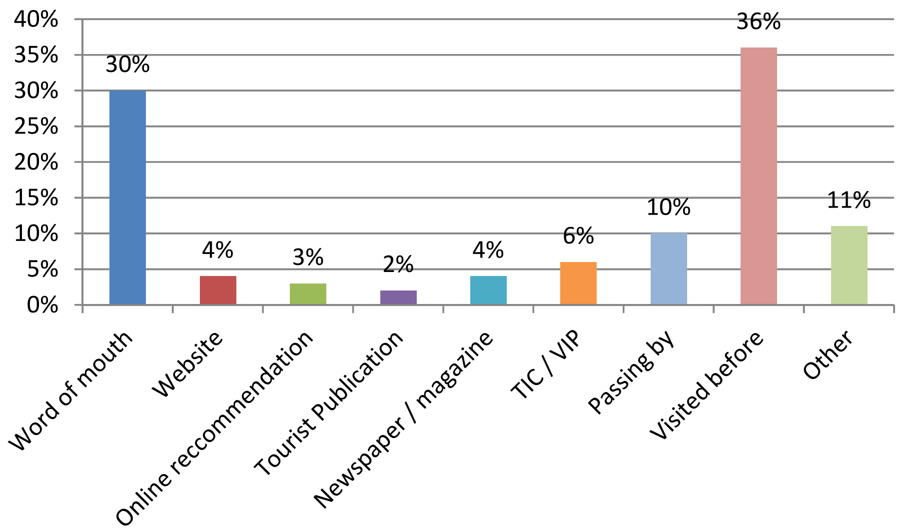

Fig.17 How did you hear about primary activity in Abingdon?

Focussing on the leisure orientated activities, interviewees were questioned on how they heard about that particular activity. 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.

Cross tabulating the influencing factor for visit against the mode of transport allows us to test whether those arriving by certain modes of transport are likely to respond to certain stimuli for visiting. Results are show in the figure below:

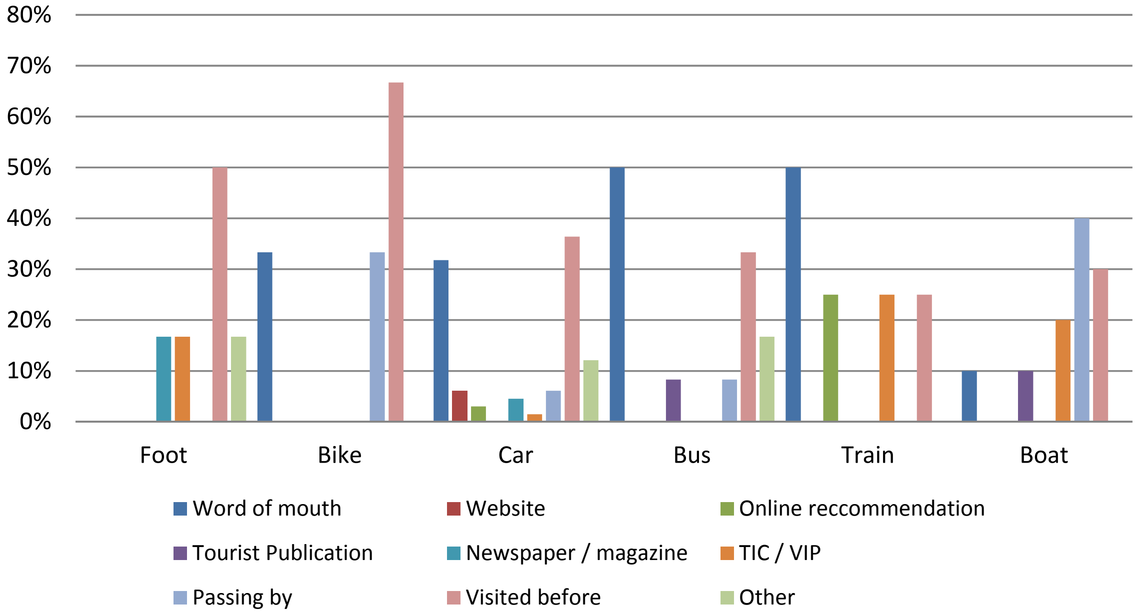

Fig.18 Influencing factors for visit against mode of transport

"Visited Before" was the primary method of hearing about the main activity for those arriving by foot or by bike and was a strong method for all the other groups as well.
"Word of mouth" was particularly strong for those arriving by Bus and Train.
"Passing By" was the favoured option for Boat Users.
Very few groups showed high responses for more direct marketing methods with the exception of "Online Recommendation and TIC" for train users and “TIC" for Boat Users.

g) Activities undertaken during visit to Abingdon

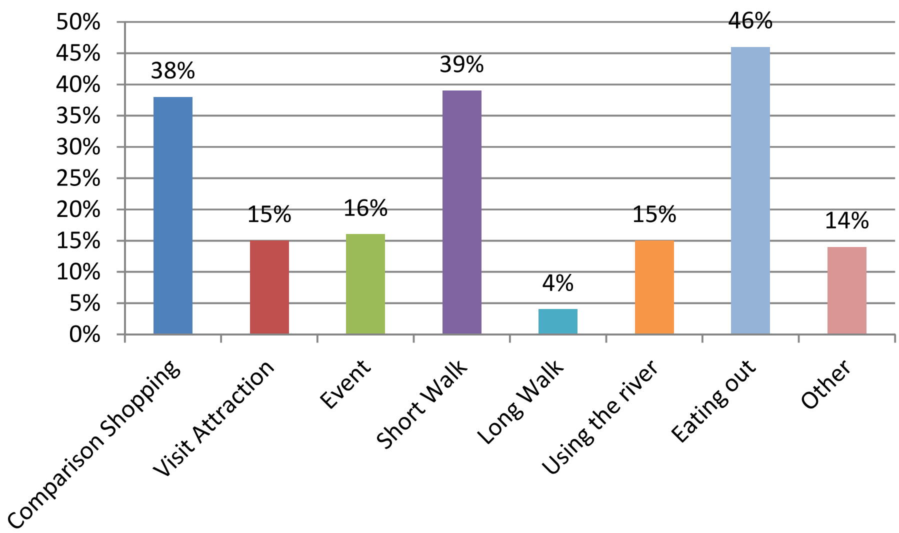

Fig.19 What acitivites have you undertaken today in Abingdon? (multiselect)

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.' We can see therefore that whilst 'eating out', 'short walk' and 'comparison shopping' score low on main reason for visit they form a significant secondary part of the visitor experience.

Cross referencing activities undertaken by visitors against their primary reasons for visiting we can see particularly strong correlations (more than 50%) between:

Primary Reason for visit	Secondary Activities	
VFR	Eating Out	
Market	Comparison Shopping	
Attending an Event	Comparison Shopping	Eating Out
Using the River	Short Walk	
Eating Out	Comparison Shopping	Short Walk

Table 16– Main purpose of visit against Secondary Activities

h) Average Spend per head

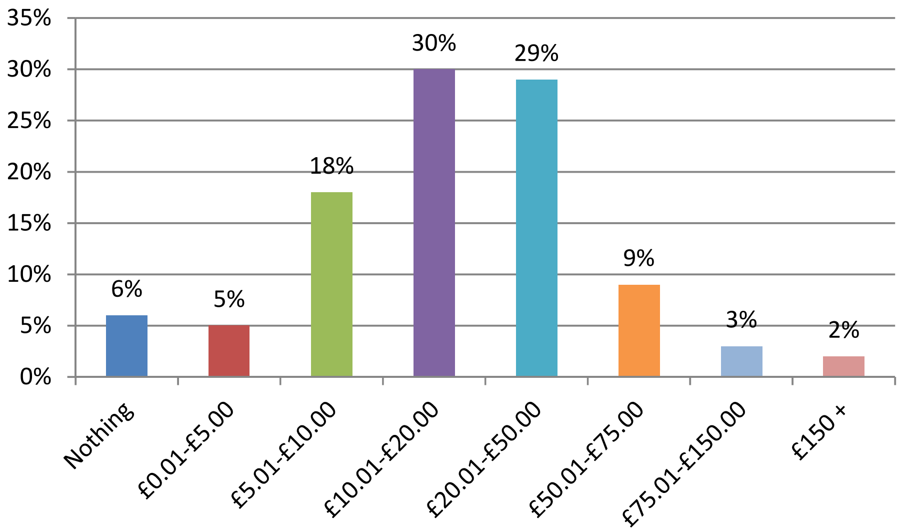

Fig.20 How much do you inend to spend per person today in Abingdon?

Abingdon's spend profile trends towards low to middling spend per head with 59% of visitors indicating 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.

Cross referencing average spend against primary reason for visiting allows us to test whether certain activities promote a higher level of spend. Average spend against primary reason for visiting is summarised in the table below:

Main purpose of visit	Average Spend per person
Comparison Shopping - e.g. clothes	£46.90
Visiting Friends & Relatives	£74.30
Market	£71.10
Visiting an Attraction	£70.00
Event	£41.50
Short Walk	£16.80
Long Walk	£8.20
Using the River	£8.90
Eating Out	£40.50
Other	£20.10

Table 17 – Main purpose of visit to Abingdon against Average Spend

Visitors with the highest average spend were those whose main reason was "VFR", "Market", or "Visiting an Attraction". Responses for "Short Walk", "Long Walk" and "Using the River" all spent on average less than £10 per person.

i) Length of Stay

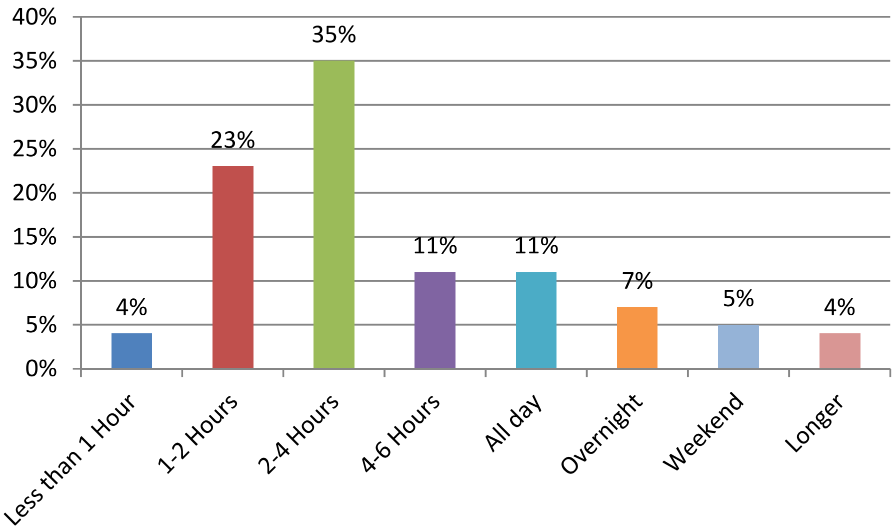

Fig.21 How long do you intend to stay on this visit to Abingdon?

Abingdon's visitor profile shows a tendency towards short day visits with 35% of visitors reported 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.

Cross referencing length of stay against primary reason for visiting allows us to test how certain activities dictate how long visitors stay for. Length of stay against primary reason for visiting is summarised in the table below:

Main purpose of visit	Average Length of Stay
Comparison Shopping - e.g. clothes	2 hours
Visiting Friends & Relatives	Weekend
Market	2 hours
Visiting an Attraction	All Day
Event	All Day
Short Walk	3 hours
Long Walk	2 hours
Using the River	Weekend
Eating Out	3 hours
Other	6 hours

Table 18 – Main purpose of visit to Abingdon against Average length of stay

Visitors staying longest were those whose main reason was "VFR", "Using the River", "Attending an Event" or "Visiting an Attraction", whereas visitors who gave responses for "Shopping", “Long Walk”, “Eating Out” and “Short Walk" all stayed for 4 hours or less.

j) Locations visited within Abingdon

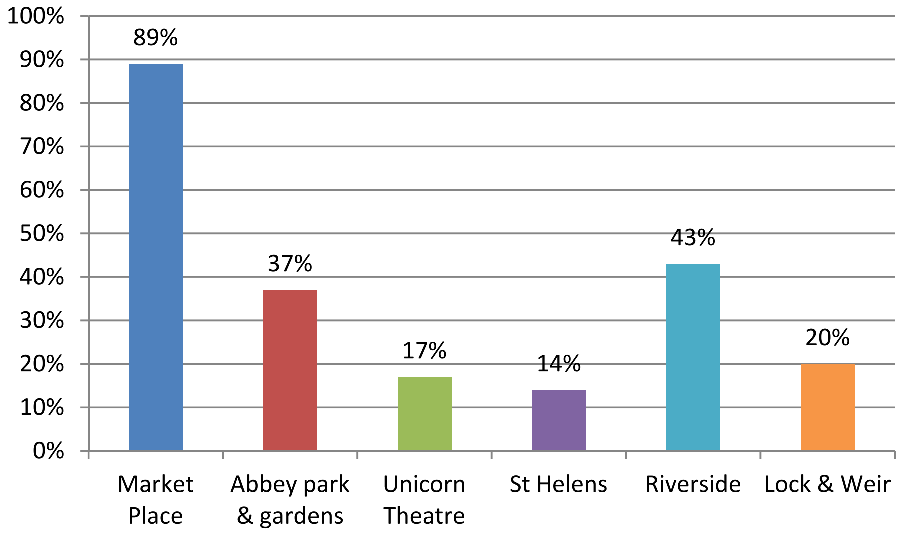

Fig.22 Which locations have you visited within Abingdon today?

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. Visitors are reaching the other areas but not in as high a volume, therefore if Abingdon wishes to spread visits to specific areas further information or incentive needs to be provided to do so.

Cross referencing locations visited against primary reason for visiting allows us to test whether certain activities dictate where visitors go within the town centre. Locations visited against primary reason for visiting is summarised in the figures below:

Fig.23 Locations visited against Primary reason for visit – Market Place & Abbey Park

The Market Place showed a very even spread of activities, clearly indicating its status as the most popular venue for visitors regardless of motivation for visiting.
Abbey Park & Gardens showed no responses for "Comparison Shopping" and higher responses for "Visiting and Attraction", "Short Walk", Eating Out" and "Other".

Fig.24 Locations visited against Primary reason for visit – Unicorn Theatre & St.Helen's

Unicorn Theatre & Abbey Buildings showed no response for "Comparison Shopping" or "Using the River" and higher responses for "Visiting an Attraction" and "Event".
St. Helen's showed no responses for "Comparison Shopping" and higher responses for "Eating Out", "Short Walk" and "Long Walk".

Fig.25 Locations visited against Primary reason for visit – Riverside & Lock & Weir

The Riverside showed a spread of all responses and higher responses for "Long Walk", "Eating Out" and "Using the River".
The Lock & Weir showed no responses for "Market" and higher responses for "Eating Out", "Using the River" and "Long Walk"

k) Visitor satisfaction with Abingdon

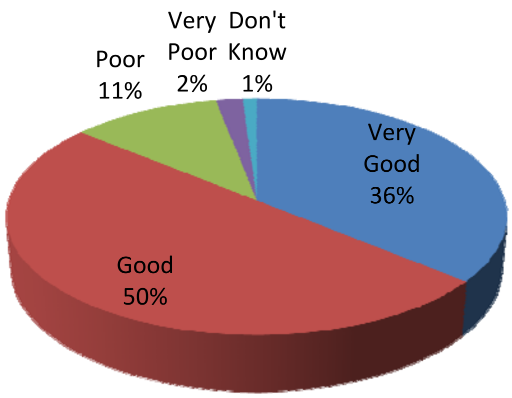

Fig.26 How do you rate the physical appearance of Abingdon?

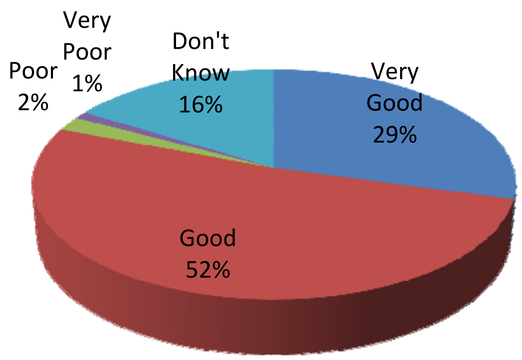

Fig.27 How do you rate the quality of service in Abingdon?

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'. (29%) It must be noted however, 16% of Visitors responded to the question with a 'Don't Know'.

Cross referencing the data on visitor satisfaction against the locations visited allows us to test whether specific areas were performing differently or whether the town as a whole was consistent. Results are shown in the following figures:

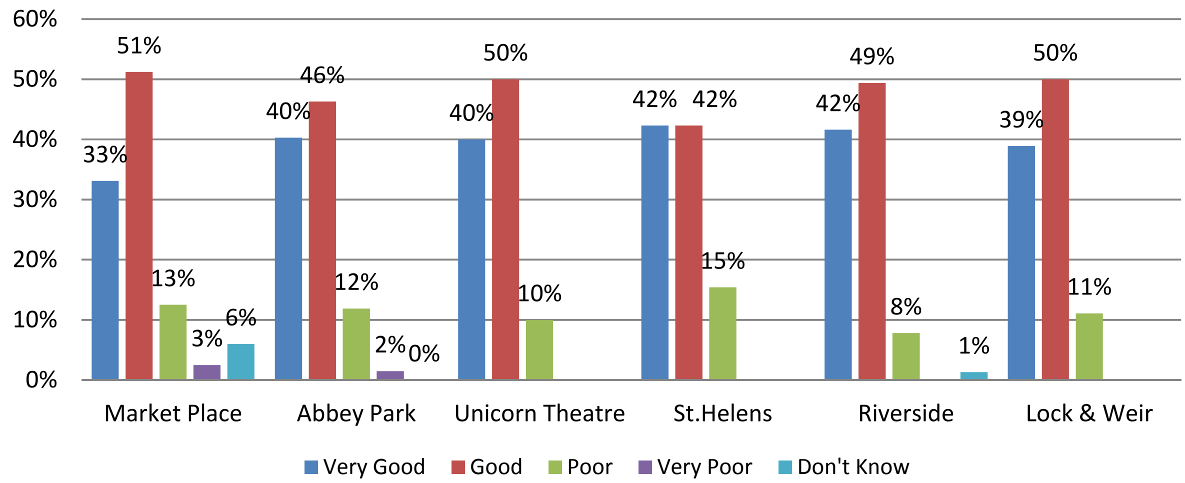

Fig.28 Rating of Physical Appearance against Location visited

All areas of Abingdon rated highly for their physical appearance. The Riverside, Lock & weir and Unicorn Theatre (between 8-11% combined) received marginally less negative perceptions. The Market Place had less extremely positive perceptions (33% very good). Overall though there is little to separate the locations or give any sense that a particular area was letting the side down.

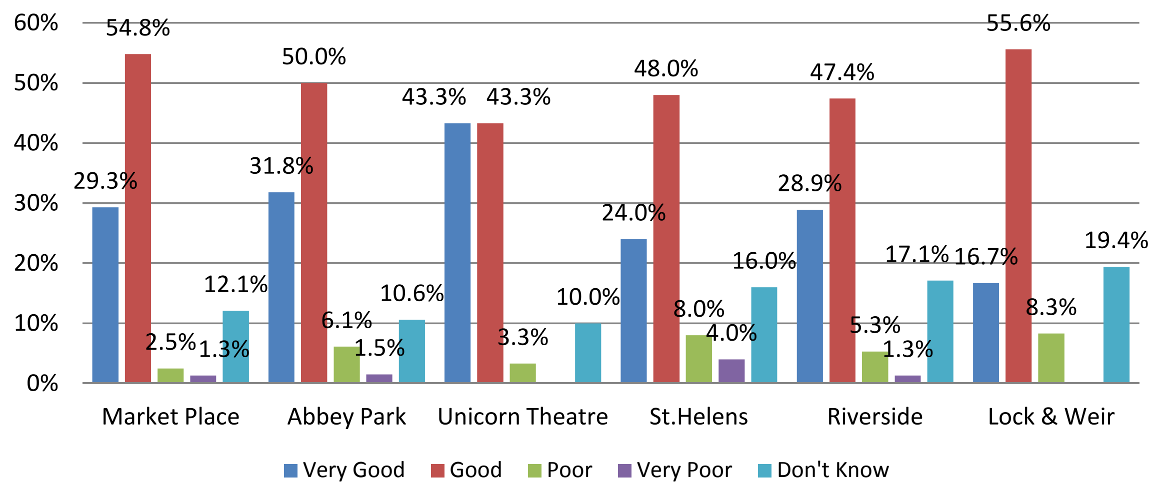

Fig.29 Rating of Quality of Service against Location visited

Quality of service also remained high across all the locations. The Unicorn Theatre (3.3% combined) showed the lowest negative perception along with the Market Place (3.8% combined). Positive perceptions in less service oriented areas were tempered by the amount of "Don't Know" responses. Again there is little to separate the locations or see any area where service was significantly noted as being poor.

l) Navigation & Signage

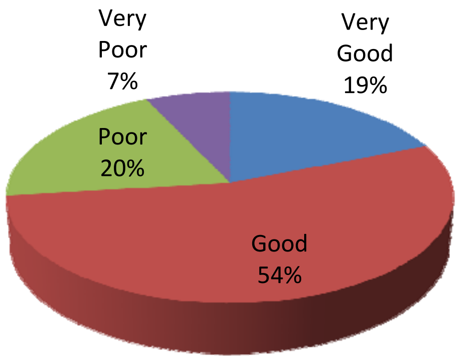

Fig.30 How do you rate finding your way around by car?

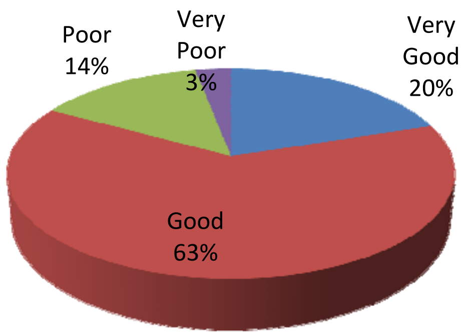

Fig.31 How do you rate finding your way around on foot?

Navigation and accessing the destination also scored highly, however the percentages of 'poor' or 'very poor' results were higher here with only 73% of visitors rating Abingdon as either 'Good' (54%) or 'Very Good' (19%) in regards to being able to find their way around the town in a 'Car'. Access and navigation by foot was perceived as more positive with 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'.

m) Positive & Negative perceptions of Abingdon overall

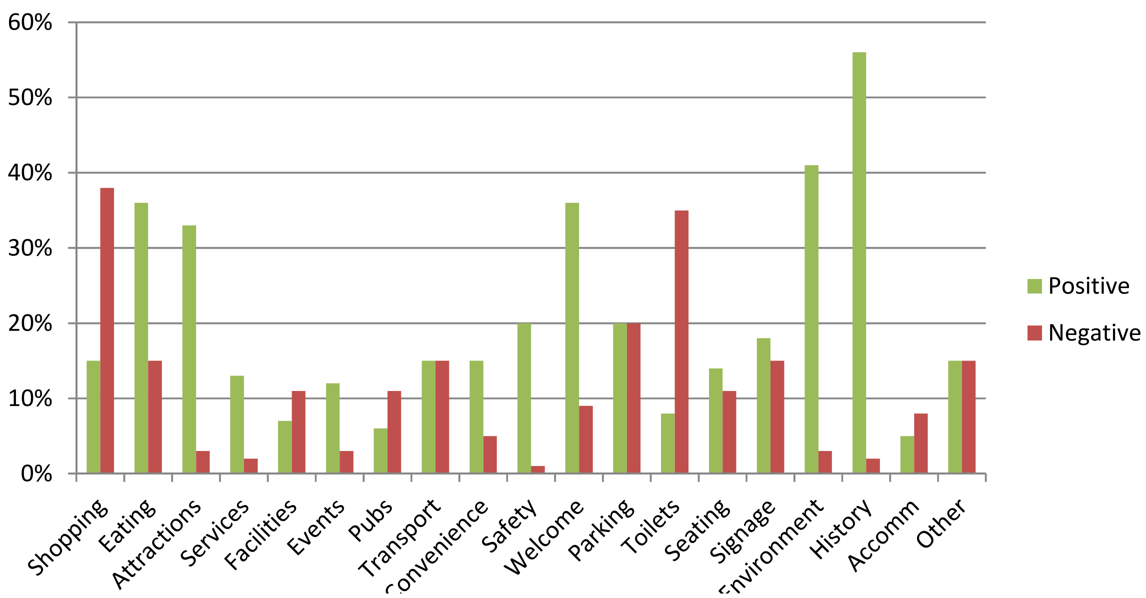

Fig.32 Ratings of Positive and Negative Aspects of Abingdon

Top 5 Positive Aspects	%
Historical setting	56%
Natural Environment	41%
Places to eat	36%
Feeling of Welcome	36%
Visitor Attractions	33%

Table 19 – Top 5 positive Aspects

Top 5 Negative Aspects	%
Shopping	38%
Public Toilets	35%
Car Parking	20%
Places to Eat	15%
Transport Links	15%
Maps and Signs	15%
Other	15%

Table 20– Top 5 negative aspects

Abingdon's most positive aspects were largely related to elements of key importance to the visitor experience, i.e. the appearance and setting ('Historical Setting' 56% and 'Natural Environment' 41%'), the facilities ('Places to Eat' 36% and 'Visitor Attractions' 33%) as well as the more intangible elements of a great experience ('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%. Many supplementary comments would indicated this was often related to the precinct development and its current state, but also to the amount of charity or empty shops as well as the perceived limited range. On a positive note only 1% of respondents felt 'Safety' was an issue in the town.

The Choose Abingdon partnership asked to test several correlations of the positive and negative perceptions for several user groups. Firstly looking at those who responded to "Mode of Transport" with "By Boat" and what they perceived as positive or negative:

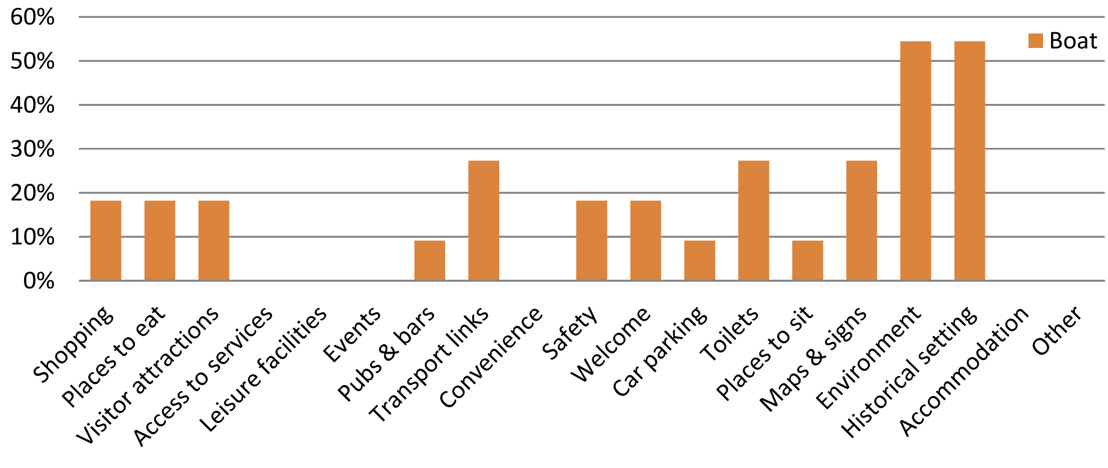

Fig.33 Arrived by Boat against aspects of Abingdon noted as positive

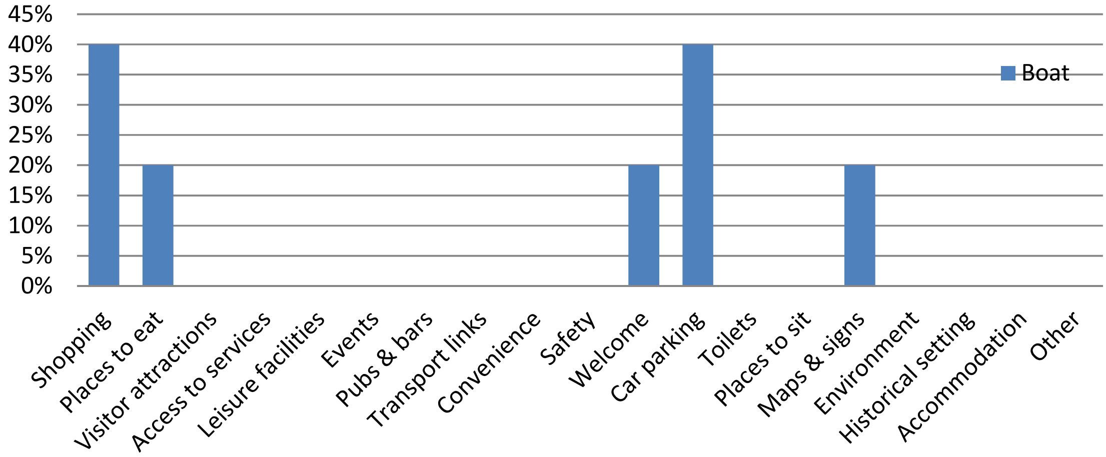

Fig.34 Arrived by Boat against aspects of Abingdon noted as positive

Boat Users rated "Historical Setting" and "Environment" most positively (54.5% each), followed by Toilets, Maps & Signs and Transport Links (27.3% each).
Boat Users rated "Shopping" and "Car Parking" as the most negative aspects (40% each), followed by "Places to eat", "Welcome" and "Maps & Signs" (20% each).

Secondly we looked at the correlation between those who came to walk or undertake outdoor activities and how negative they felt about the public toilets. Results are shown below:

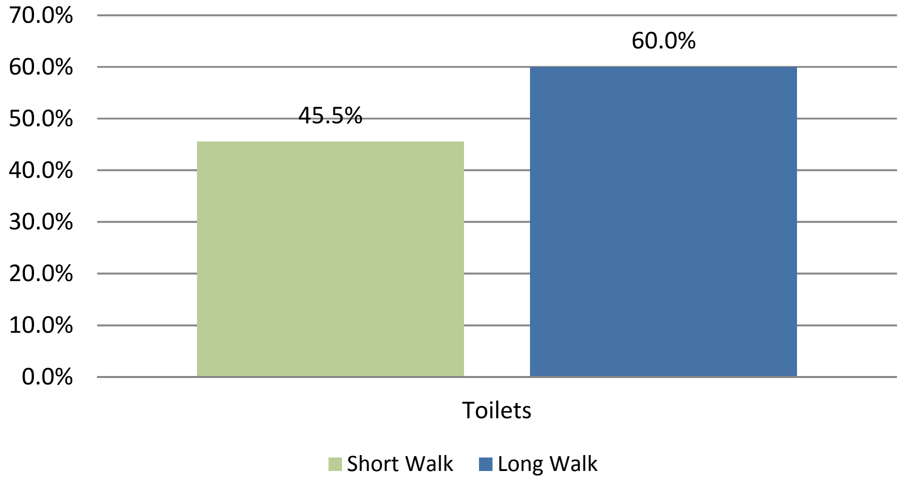

Fig.35 Purpose of visit as 'Walking' against perceptions of public toilets as negative

45.5% of visitors who gave “Short Walk” as primary reason for visiting rated the public toilets as a negative aspect, as did 60% of those who gave “Long Walk” as a reason. Clearly this shows that toilets are an issue for this user group.

Finally we looked at the correlation between age group of visitors and negative perceptions of ‘public toilets ‘and ‘shopping’ to determine if this negative response was skewed in favour of a particular demographic. Results are shown below:

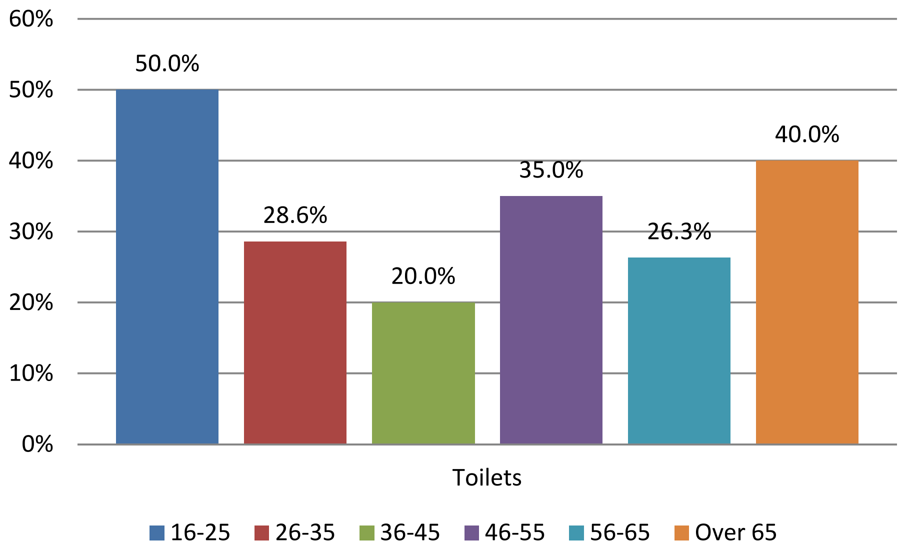

Fig.36 Age group against perceptions of public toilets as negative

Public toilets were largely viewed as negative across the board but were considered especially so by 16-25 (50%), Over 65's (40%) and 46-55 (35%). The fact that younger audiences were bothered by this was unexpected.

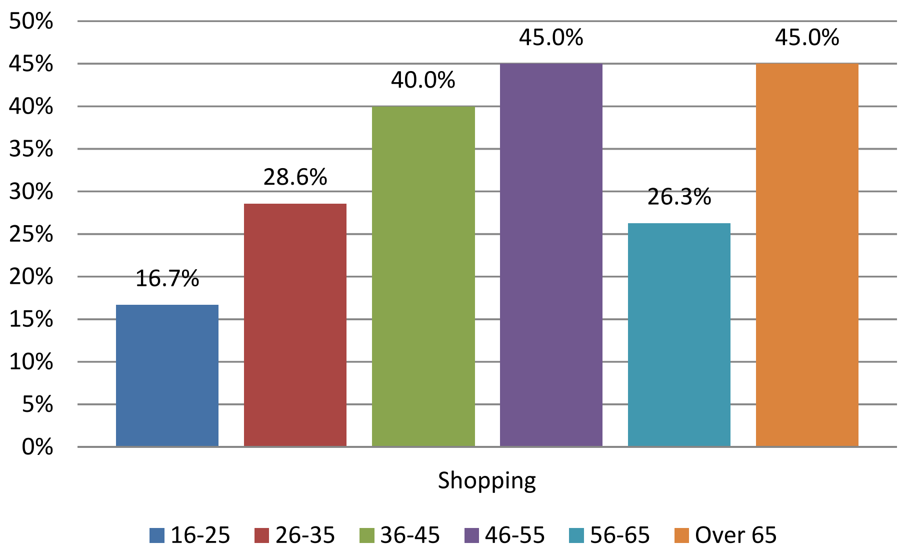

Fig.37 Age group against perceptions of shopping as negative

Shopping was perceived as a negative aspect most strongly by the 46-55 and over 65's (45% equally), followed by 35-45 age group (40%).

n) Likelihood of future action

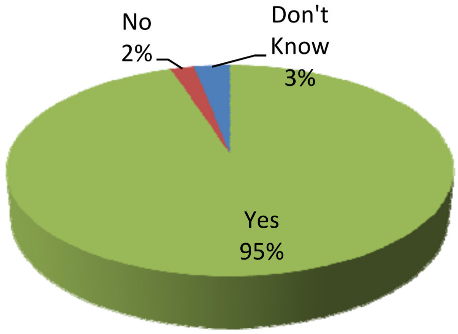

Fig.38 Would you visit Abingdon Again?

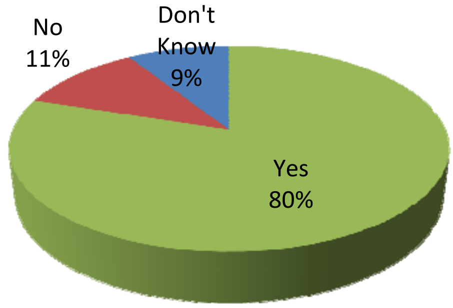

Fig.39 Would you recommend Abingdon to others?

Abingdon scored very positively in terms of future actions visitors would take as a result of their experiences during a visit with 95% stating that they would 'visit Abingdon again' and 80% reporting that they would 'recommend Abingdon to others as a place to visit.' It is clear therefore that the overwhelming majority of visitors are very pleased with the experience of a visit to Abingdon.

Cross referencing likelihood of future action against primary reason for visiting allows us to test whether people who came for certain reasons enjoyed the experience of Abingdon enough to inspire future action. The results are shown in the tables below:

Main purpose of visit	Visit Again?			Recommend?		
	Yes %	No %	? %	Yes %	No %	? %
Comparison Shopping	100	0	0	100	0	0
VFR	100	0	0	78.1	15.6	6.3
Market	100	0	0	100	0	0
Visiting an Attraction	88.9	5.6	5.6	83.3	5.6	11.1
Event	96.6	0	3.4	86.2	10.3	3.4
Short Walk	92.9	7.1	0	84.6	7.7	7.7
Long Walk	100	0	0	100	0	0
Using the River	100	0	0	88.9	0	11.1
Eating Out	100	0	0	60	40	0
Other	100	0	0	57.1	28.6	14.3

Table 21 – Main purpose of visit to Abingdon against likelihood of future action

The only significant dips from an overwhelmingly positive rating in return visits are seen in those with main reasons of visiting being; "Visiting an Attraction", "Short Walk" and those who were unsure about "Events".
The responses were also largely positive on recommendation. The big exceptions are those who came primarily for; "Eating Out"(28.6% would not recommend), "Other"(28.6% would not), "VFR" (15.6% would not) and "Event"(10.3%).

o) Suggestions to improve Abingdon's visitor experience

A number of 'themes' emerged from the qualitative analysis of the comments supplied by Visitors in regards to what improvements they would like to see made in Abingdon. Full responses are included in Appendix 6 but the key themes are summarised below.

1. **'Retail Offer'** was a common theme to emerge from the suggestions. These comments focussed largely on the range or quality of the shopping offer in comparison to other towns, as well as requesting more independents or certain types of shops. There were also comments about the number of empty or charity shops. Issues related to the **'Precinct'** were also mentioned frequently, mostly around the need for the development to be completed quickly and in keeping with the rest of the town.

2. **'Improving signage'** was another theme to emerge from the suggestions. These comments were mostly focussed on pedestrian signage in terms of orientation towards specific locations (the TIC was specifically mentioned), there was also a strong voice for improvements for signage between town and river.

3. **'Traffic & transport'** was a key bugbear for people, almost exclusively relating to the congestion and traffic flow caused by the one-way system.

4. **'Improvements to the River** was mentioned several times with specific requests for more and improved facilities by the river (food, toilets and seating mentioned specifically), improvements to the riverside path and better signage and promotion of the lock and riverside walks.

5. **'Car parking'** featured in the comments, with a division between aspirations for greater capacity and those for cheaper parking (i.e. free parking for longer).

6. **'Public Toilets'** also merited several comments, almost exclusively on the need for better upkeep and cleanliness. There were also several requests for more toilets at different locations and better signage to the ones that do exist.

3.4.2 Comparisons with Other Towns

Utilising the Action for Market Towns Benchmarking Dataset and Hidden Britain's own Business Survey Datasets we can analyse several of the Abingdon results against national averages.

a) Length of stay

How long do you intend to stay on this visit to the town centre?	Abingdon %	National Large Towns %	National Small Towns %
Less than an hour	4	12	34
1 - 2 hours	23	40	43
2 - 4 hours	35	27	12
4 - 6 hours	11	7	3
All day	11	14	7
Longer	16	0	1

Table 22– Average length of stay in Abingdon against National Market Town Averages
(Source – Action for Market Towns Town benchmarking Dataset 2011)

The comparison table above shows that Abingdon's visitors stay longer in general than both the average for small Market Towns nationally and for large Market Towns, and also shows significantly higher proportion staying beyond a day visit.

b) Mode of transport

How did you travel to the destination today?	Abingdon %	South East %
Car / Motor Bike	69	82
Bus / Coach	14	3
Train	3	3
Cycle	3	2
Walk	5	7
Other	8	3

Table 23 – Mode of transport against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Abingdon's visitors show similar transport preferences as do the average for South East rural destinations, with the predominance of car travel being marked. However Abingdon shows a higher proportion of bus users (11% above average) likely as a result of the good links with Oxford and Didcot (for mainline rail). The higher figure in 'other' is reflected by Abingdon attracting visitors by boat.

c) Reason for Visit

Primary reason for visit?	Abingdon %	South East %
Comparison Shopping	3	17
Visiting Friends and Family	17	12
Market	5	1
Visiting an Attraction	19	18
Event	15	4
Short Walk	8	20
Long Walk	4	4
Using the River	5	0
Eating Out	3	7
Other	21	17

Table 24 – Primary Reason for visit against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Abingdon shows interesting variations from the average in terms of primary reasons for a visit, with much lower responses for ;'shopping' and 'short walk' than would be anticipated. Overall it seems clear that Abingdon's visitors are coming to undertake a specific visitor related activity as opposed to shopping, general sightseeing or wandering around, which the high responses for 'VFR', 'event' and 'attractions' bear out.

d) Influencing factor on primary reason for visit

How did you hear about main reason for visit?	Abingdon %	South East %
Visited Before	36	35
Word of Mouth	30	23
Online	7	6
Publications	2	8
Press	4	3
Passing By	10	9
Other	11	16

Table 25 – Influencing Factor on Primary Reason for visit against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Abingdon's visitors largely responded inline with the expected averages, with significant differences only in 'Word of Mouth' where Abingdon showed 7% higher and 'publications' where Abingdon came in 6% lower. Overall this shows that Abingdon's visitors are marginally less motivated by direct marketing at present than those visiting other towns and more likely to respond to experience or recommendations.

e) Satisfaction with physical appearance of the town

How did you rate the physical appearance?	Abingdon %	South East %
Very Good	36	56
Good	50	34
Poor	11	10
Very poor	2	0
Don't Know	1	0

Table 26 – Satisfaction with physical appearance against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Abingdon performed slightly below the average in terms of its physical appearance, with around a 20% swing towards 'good' rather than 'very good'.

f) Satisfaction with quality of service

How do you rate the quality of service?	Abingdon %	South East %
Very Good	29	49
Good	51	39
Poor	2	11
Very poor	1	1
Don't Know	16	0

Table 27 – Satisfaction with quality of service against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Abingdon performed again slightly below average in terms of perception of quality of service, with again less respondents answering 'very good'. However Abingdon had much lower scores for negative perception, perhaps indicating that whilst there is room for improvement the majority of service is above average, if not quite exemplary.

g) Likelihood to recommend

Would you recommend to others?	Abingdon %	South East %
Yes	80	88
No	11	3
Don't Know	9	9

Table 28 – Likelihood to recommend to others against South East Averages
(Source – Hidden Britain Tourism Business Surveys Dataset 2011)

Abingdon was again below average in terms of likelihood to recommend, with more than 3 times as many people unlikely to recommend compared to the south East average.

3.4.3 Conclusions

In this section we will attempt to draw some conclusions on visitor motivation, behaviour and profiles based on the results of the dataset.

a) The 'Average' Abingdon Visitor

Looking at the data as a whole we can draw a picture of the most statistically average visitor to Abingdon. The average visitor is:

» Female
» Aged 54
» Lives in Oxfordshire but outside OX14
» Visits in a family group without children
» Arrived by car
» Came to Abingdon to 'Visit a Tourist Attraction'
» Has undertaken this visit due to previous knowledge of Abingdon
» Will in order of likelihood also eat out in Abingdon, take a short walk and browse the shops
» Spends £29 per visit
» Stays for between 2 and 4 hours
» Visits the Market Place and also quite likely to visit the Riverside and Abbey park & Gardens
» Would visit Abingdon again and would recommend the town to others.

b) Key markets & Audiences

From the Visitor data we can broadly identify several key audiences already visiting and using Abingdon as a leisure destination. Note however that these are only indications and given the relative percentages in samples they cannot be expressed with 100% confidence that they representatively comprise Abingdon's market.

1. VFR

Visiting Friends and Relatives is clearly a large market for Abingdon comprising 17% of the sampled respondents. This group are likely to:

- Be drawn from all age groupings
- Travel by modes other than car indicating they originate in the local area
- Twice as likely to stay for a full day or longer
- To eat out and take a short walk as part of their visit
- To spend highly (£50 plus)
- Very likely to return but less likely to recommend.

In order to reach and grow this market Abingdon needs to:

- Improve the en-situ experience with a focus on product and service
- Promote the town to its local residents thereby reaching the VFR audience
- Data capture at point of sale and then follow-up

2. Day Leisure Trippers

84% of Abingdon's sampled visitor market stayed for the day only. 88% travelled from less than 75 miles away. This group is likely to:

- Be drawn from all age groupings
- Travel by train, bus or car from less than 75 miles away
- To visit for the primary reason of visiting an attraction or attending an event
- To be influenced by previous visits, and recommendations but also to use TIC's and check online recommendations and newspaper & magazines
- To stay for at least 2 hours but likely between 4 and 6
- To shop, eat out and take a short walk as part of their visit
- To spend at least £50 per person
- To visit most areas of the town but less likely to visit St.Helen's or the Lock & Weir
- Quite likely to return and likely to recommend.

In order to reach and grow this market Abingdon needs to:

- Maintain the physical appearance, quality of service and facilities
- Improve interpretation of the town, including suggested days out to promote longer stays and repeat visits
- Raise awareness of accommodation options and offer incentives for staying over
- Consider discounted parking fees for visitors visiting a number of attractions in a single day
- Concentrate marketing to areas within 2 hours drive of Abingdon

3. Event Goers

Effectively a subset of the Day Visitors group but with 15% of all Abingdon's visitors coming for the purpose of attending an event we should consider them individually as well. This group is likely to:

- Twice as likely to be over 46
- Travel by train, bus or car from less than 75 miles away

- To be influenced by recommendations (both in person and online) but also to have visited before and also read about the event in newspaper & magazines
- To stay for between 1 and 4 hours
- To shop, eat out and take a short walk as part of their visit
- To spend around £35 per person
- To visit the central historic areas of the town but unlikely to visit St.Helen's or the Lock & Weir
- Very likely to return but only quite likely to recommend.

In order to reach and grow this market Abingdon needs to:

- Maintain the physical appearance, quality of service and facilities
- To develop more quality events based around the main qualities of Abingdon's offer, thereby attracting visitors Abingdon can naturally service and encourage
- Position interpretation and information around the events to encourage longer stays
- Consider developing elements of the events that can be enjoyed year round to encourage repeat visits
- Concentrate marketing to areas within 2 hours drive of Abingdon

4. Outdoor activists

A combined 12% of the sample came to undertake some form of outdoor activity. This group is likely to:

- Be drawn from all age groupings
- Travel by car or bus, but equally likely to have arrived under own power (foot or bike)
- To be influenced by previous visits, recommendations or by passing through but also likely to have read publications and visited websites to research routes.
- Stay for 2 hours only
- To shop, eat out and use the river as part of their visit
- To not spend highly (average around £10-£15 only)
- To visit almost all areas of the town
- To be most concerned with transport links and public toilets
- Very likely to return and likely to recommend.

In order to reach and grow this market Abingdon needs to:

- Improve the physical appearance, facilities and signage at the riverbank
- Improve the public toilets
- Make local routes that take in the town itself more easily available in situ
- Make local information on transport links more easily available
- Publicise and target marketing at known user groups and publications
- Create incentives or training to encourage them to use businesses
- Plan events specifically to attract this group for the day

5.River Users

Whilst this group comprises only a fraction of the total market, one of the key parts of Abingdon's offer is the river, therefore it is not only useful to target river users, but also to take advantage of the additional animation and ambience a vibrant riverside brings to the destination for other groups. This group are likely to:

- Be between 36-45
- Travel by boat
- To stop for the primary reason of visiting an attraction
- To be influenced by previous visits, recommendations or by passing through
- Stay overnight on longer (although a minority will stop for 2 hours or less)
- To shop, eat out and take a short walk as part of their visit
- To not spend highly (average around £10 only)
- To visit the areas closest to the river and the market place, less likely to visit the more historic areas
- To value the history, environment and facilities highly
- Very likely to return and very likely to recommend.

In order to reach and grow this market Abingdon needs to:

- Improve the physical appearance, facilities and signage at the riverbank
- Make interpretation of town more accessible to river users
- Incentivise them to spend more (consider discounts or offers for coming by boat etc)
- Encourage online recommendations via social media with other river user groups

4. Conclusions & Recommendations

4.1 Conclusions

This report has brought together the main findings of the research programme delivered by Hidden Britain and spells out the performance of Abingdon in terms of its visitor economy and helps us to understand; what Abingdon has, what its stakeholders and businesses think and want, who visits, why they visit, how they behave and what they think of the destination. All of this information is vital in building a clear and deliverable strategy for tourism going forward that can impact on Abingdon's bottom line, improve its vibrancy and economic performance and make it a place where people want to live, work and visit.

The data shows that Abingdon is somewhat different from the traditional perception of a market town, and that its visitors are coming for leisure reasons, and largely specific ones as opposed to a general "day out in the country". The audiences are however more 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. It is clear from the Visitor Survey and the Mystery Visitor assessment 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. It is also clear from the Product Audit that Abingdon offers a relatively diverse and robust offer, with a good range and spread of accommodation and catering facilities, and a good amount of attractions, events and activities to encourage visitors in, (even if they are not out and out paying visitor attractions).

The business survey shows a high proportion of businesses recognise visitor spend as a vital part of the economy, and an encouragingly large amount are aware of the Abingdon partnership which will be useful if it chooses to be the leading spear head for tourism in the town. 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. Moreover it is very clear for all the studies that 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.

However there is clear room for improvement, most chiefly with the need to develop a clear and consistent strategy and implementation model to ensure visitor and tourism development delivers bottom-line benefits to Abingdon as a holistic destination. In particular certain aspects of the in-situ experience require attention, as does the plans, methods and channels Abingdon uses to raise awareness of its product and communicate with the outside world, equally 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, and of course there are always new developments, infrastructure and facilities that will complement and improve the offer Abingdon makes.

These are not simple tasks, but with this base of research providing clues, trends and answers, decisions and delivery can be made in an informed way that really can make a difference to Abingdon's bottom-line and ensure its competitiveness in the visitor environment.

4.2 Recommendations

Based on the research programme, we have outlined below several key recommendations for Abingdon to consider as ways forward to develop and improve the visitor economy.

1. Develop a clear and robust strategy for tourism

Abingdon at present comes across as slightly ad-hoc in its approach to tourism and the visitor economy, however to make real impacts and ensure consistency and clarity in its develop we would advise a need for a destination tourism strategy. This does not need to be a lengthy and impenetrable document, rather it should simply provide a consistent direction and framework for activities to place within as well as providing guidance and principals for new developments and activities.

2. Address key issues of the visitor experience

There are several key areas that research has identified that need work, and given that they have been voiced by visitors, residents and external experts they are areas that should be addressed. We would suggest the following require closer attention:

- Car Parking and traffic flow through the town
- Public toilets
- Maintaining general cleanliness and upkeep of public space
- Signage and interpretation
- Business rates and incentives to encourage uptake of vacant units
- Facilities and improvements to the riverside and linkages between the river and town

3. Address marketing and external communications

Abingdon's marketing and promotion as a destination is poorly conceived and implemented at present, work needs to be undertaken to not only identify and develop the channel for communication, but at a much more fundamental stage to actually decide on and articulate the offer. Destinations need clear and consistent offers in order to attract visitors and need to play on certain hooks or triggers that will appeal to their audiences in order to stand out from the competition.

However this must always be based on a balance between what the audiences and markets are looking for and what Abingdon, its residents, businesses and other stakeholders want to achieve. The clearer this can be articulated the simpler it is to build the offer and communicate consistently and effectively to the potential audiences.

With a clear offer in place, the primary communication channels need to be reviewed and developed, we would advocate the following areas as key to this development:

- A single primary and well developed web portal
- Streamlined and targeted print publications
- More collaborative and consistent usage of social media
- Leveraging recommendations and positive reviews in tactical marketing
- Utilising the strength of the experience and conveying it through "experiential " marketing
- Making it simple for the visitor to choose Abingdon
- Reviewing and improving what others are saying about Abingdon
- Collecting collateral and evidence that all can use to best promote the destination

4. Encourage better stakeholder cooperation

Tourism in Abingdon is currently implemented by various organisations and bodies, many of them working in silos, there is therefore a need as discussed above for a consistent strategy for development and delivery. However effective destination management does not happen by a single organisation being in total control of the whole rather it means teamwork and partnerships requiring the right people, with knowledge and understanding of the visitor economy, taking decisions and working cooperatively for the good of the destination as a whole.

However Abingdon decides to take tourism forward and manage it, it is (in our opinion) only likely to be successful based a good relationship with the businesses, organisations and other interest with that stake in tourism. The Choose Abingdon partnership has done plenty of good work so far in looking at the town through this lens, but more work needs to be done, particularly amongst some business sectors to get more people on board, and ultimately to encourage everyone to row in the same direction.

5. Develop the product

The research clearly shows that Abingdon's visitors come for specific leisure reasons, it also shows that length of stay is relatively short, therefore a key recommendation is to act to develop new activities or build on existing ones that provide more facets to the Abingdon product. We are looking for activities and attractions that will provide additional incentives to visit and equally to occupy visitor time once they arrive, but they should also reflect the Abingdon product and be something Abingdon's key audiences will value. Therefore Abingdon could consider the following as a starting point:

- Building on the events programme
- Interpreting the historical setting of the destination
- Costumed and guided walks
- Cycle hire and promoted rides
- Activities allowing non-river users to interact with the river

6. Consider regular research

Further research should be considered on a regular basis to allow this report to be used as a benchmark and to evaluate the ongoing change and performance of the visitor economy in Abingdon. In particular we would advocate:

- Ongoing maintenance and updating of the product audit
- A regular programme of Mystery Visitor studies, perhaps bimonthly or quarterly
- A yearly repetition of the Business Survey
- Plan for a repeat of the visitor survey in two years time
- Revisiting the marketing assessment for any new communications activities
- Implementation of tracking and measuring systems within all future activities

5. Next Steps

Finally this section outlines the next steps Abingdon should take to move this forward from research to action.

1. Share the findings

Research is an incredibly useful tool but all too often remains gathering dust on shelves on remains in the custody solely of the commissioner, both of which would be to waste the data collected here. Therefore the findings within this study should be disseminated both within the Partnership and externally so all the stakeholders can view them . The available data can provide a good source of information for future planning and is also a useful catalyst to develop wider engagement.

2. Determine core elements of the offer

Hidden Britain as part of its funded work will work with Abingdon to develop the core elements of its offer. These elements distil down and codify the main qualities and ideas that can then begin to build an Abingdon brand and include:

- What Abingdon wants to achieve
- The key assets Abingdon has
- The weaknesses and barriers to be overcome
- Identify and prioritise the core audiences

3. Develop outline actions

As a further part of its funded work Hidden Britain will work with Abingdon to draw together an action plan to deliver the recommendations outlined above and integrate these with Abingdon's objectives to provide a working document for activity going forward.

4. Undertake further research to test

With actions and ideas in place, Hidden Britain will be available to deliver the focus group initially identified as part of this programme to further test and develop the ideas and brand elements with some of Abingdon's priority audiences.

5. Planning regular updates to research

Hidden Britain will advise the Choose Abingdon partnership on how to plan and develop their ongoing research programme, and where possible provide the methodologies and tools to allow them to do so.

6. Appendices

- 1 - Product Audit
- 2 - Full mystery visitor
- 3 - Full marketing audit
- 4 - Full Business Survey Results
- 5 - Business Survey cross tabs and interpretation
- 6 - Full Visitor Survey Results
- 7 - Visitor Survey cross tabs and interpretation