

Bath Christmas Market Survey 2019

Draft Report

Produced for and on behalf of Visit Bath by
The South West Research Company Ltd.

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Bath Christmas Market Survey 2019



2019 Snapshot



CHILDRENS AREA
WHAT'S ON
QUEEN SQUARE - SATURDAYS
24 NOV - 1 DEC, 8 DEC
CHILDRENS SING-A-LONG: 11AM - 12 NOON
JACK & THE BEANSTALK: 12 NOON - 1PM
*TALK BY MISS KUMAR & SHARON DODD (10 AM)
*TALENTED TALENTS FROM WORLDWIDE: 1-2PM
*TALENTED TALENTS FROM WORLDWIDE: 2-3PM

2019 Snapshot

- This report presents the findings of a face to face survey of visitors to Bath Christmas Market conducted between the 29th November and 14th December 2019 and an additional online survey conducted amongst BTP Christmas Market information requesters between 20th December 2019 and 9th January 2020.
- At 24%, 2019 has seen a 3% points decrease in the proportion of staying visitors to the market compared to 2018 (27%), although this still represents a 5% points increase since the 2014 survey (19%). Although the same as in 2018, at 63%, the proportion of day visitors has been decreasing (67% 2017 and 70% 2014). The proportion of local residents during 2019 increased by 2% points to its highest level at 12% (10% 2018).
- 92% of visitors were in adult only groups. The proportion of adults with children groups further decreased year on year in 2019 to 8% (11% 2018) to the lowest level experienced since 2014 (6%).
- The key changes in age profile compared to 2018 were a 6% increase in visitors aged 45-54 years (20% 2019 & 14% in 2018), a 3% increase in visitors aged 35-44 years (13% 2019 & 10% in 2018), a 3% increase in visitors aged 25-34 years (20% 2019 & 17% in 2018), a 2% increase in visitors aged 16-24 years (12% 2019 & 10% in 2018), an 8% decrease in those aged 65+ years (13% 2019 & 21% in 2018) and a 5% decrease in those aged 55-64 years (18% 2019 & 23% 2018). The proportions of visitors aged 0-15 years remained the same as in 2018 at 5%.
- The largest proportion of visitors were classified in socio economic group AB, as has been the case in all previous years. At 37%, the proportion of ABs visiting the market during 2019 was 2% points lower than during 2018 (39%).
- Overall the proportions UK and overseas visitors to the market in 2019 were similar to previous years. 94% were from the UK and 6% were from overseas. Half of all visitors lived in the South West of England (same as during 2018) including 15% within a BA postcode area (13% 2018) and 45% lived elsewhere in the UK (46% 2018).
- At 2.27 nights, the average length of stay amongst those visitors staying overnight in Bath increased to its highest level to date (2.01 nights during 2018).
- Attendance at the market (amongst online survey respondents) was highest during the Friday to Sunday periods with the peak weekend being Friday 6th Dec to Sunday 8th Dec.

2019 Snapshot

- 26% of day visitors on holiday (those on a staying trip in accommodation outside of Bath) were staying in Bristol. This represents a large increase compared with 2018 (16%).
- Around 9 out of 10 staying visitors said they would consider returning to Bath for a short break at another time of the year. 75% would consider visiting in Summer and 74% in the Spring.
- Around half of all day visitors said they would consider staying overnight in Bath in the future as part of a visit to the Christmas market.
- The proportion of first time visitors to Bath at 15% remained similar to previous years (16% 2018).
- At 31%, the proportion of first time visitors to the Christmas market remained similar to previous years.
- On average visitors had spent 4.28 hours or 4 hours 17 minutes at the Christmas Market during 2019 – just 3 minutes shorter than during 2018 (4.33 hours or 4 hours 20 minutes).
- In a similar manner to 2018, approximately half of respondents made the decision to visit within two months of the market taking place with a third visiting every year (28%) or deciding at last years market (5%).
- 79% of visitors indicated that the Christmas Market was their main reason for visiting the city, a similar proportion to previous years.
- 32% of respondents whose main reason for visiting Bath was not because of market said they were visiting as part of a leisure/holiday trip to Bath (28% in 2018) and 28% were visiting friends or relatives who lived in the city (23% in 2018).
- Car/van etc. (54%) was the most popular form of transport used to travel to Bath – a similar proportion to previous years. 42% of these respondents had used the city's park & ride facility (27% in 2018) whilst 41% had used a city centre car park (same proportion as 2018).
- 71% of visitors who had arrived at the market as part of an organised coach trip said they were dropped off at the Riverside Coach Park on Avon Street and a further 11% at Royal Avenue, Victoria Park.

2019 Snapshot

- 77% of respondents indicated that they had/or were planning to have a meal out (same proportion as 2018) whilst 75% had/or planned to do other shopping in Bath outside of the market (84% in 2018). 24% had/or were planning to visit a tourist attraction in the city (the same proportion as 2018).
- 7% had/or planned to attend an organised festive event in the city (6% 2018) including a carol service/service in the Abbey, going to the theatre, ice skating and glow in the dark crazy golf and 6% had or were planning to go to Bath Visitor Information Centre (asked about for the first time during the 2019 survey).
- The largest proportion of visitors who indicated that they had/or were planning to visit an attraction in the city cited Bath Abbey (64%, compared with 50% during 2018) and 45% said the Roman Baths (40% 2018).
- 92% of visitors who had/or were intending to go to Bath Visitor Information Centre said it was to source information and a further 11% to make a booking.
- 22% of respondents (23% during 2018) said the increased number of organised festive events on offer in Bath during the 2019 market had impacted on how long they spent in the city during their visit.
- Excluding the central area where the main market took place the most visited areas were Milsom Street/Queen Square (81%) and SouthGate (78%) compared with 86% in each case during 2018.
- 54% of visitors were prompted to visit the market from a previous visit (52% in 2018), whilst a further 25% had been recommended to visit it (24% in 2018).
- Half of all visitors who had been prompted to visit the market via the internet had used it to search for information about Bath Christmas Market only – a 3% decrease compared with 2018. 38% had used it to source information and to book their accommodation etc. online a 6% increase compared with 2018 (32%).
- Overall awareness was highest for the www.bathchristmasmarket.co.uk website homepage with 65% recognising it, a decrease compared with 2018 (73%). This was followed by 61% who recognised the www.visitbath.co.uk/christmas website (59% 2018) and 30% who recognised the

2019 Snapshot

- 82% said they had been following the market on Facebook, a significant increase compared with 25% doing so in 2018. 22% were doing the same on Instagram, again a significant increase compared with 7% during 2018. 10% were following the market on Twitter compared with 3% during 2018.
- Overall awareness was highest for the Bath Christmas Market advert with 44% recognising it, although a decrease compared with 2018 (51%). This was followed by 35% who recognised the market guide, but again a decrease compared with 2018 (50%). 24% recalled the Christmas in Bath advert produced by the BID.
- Those respondents who recognised the front cover of the 2019 guide (35% of all respondents) were also asked if they had a copy of it. 64% indicated that they did have a copy of the guide (60% 2018). 58% found the guide very useful (45% 2018). A further 35% (45% in 2018) found the guide quite useful. Only 2% (4% during 2018) said the guide had not been at all useful.
- 18% said they had been influenced to visit by the marketing/promotional materials they had seen. This was an increase of 1% point compared with 2018 (17%). Considering the large proportion of respondents visiting because of a previous visit or as the result of a recommendation, both of which are unlikely to be influenced by any marketing/promotional materials, this is a relatively good proportion of visitors being influenced.
- Average visitor spend per person per day at the Bath Christmas Market 2019 was £23.77, compared with £26.84 in 2018. In addition, visitors spent an average of £21.42 on shopping elsewhere in the city, £16.79 on eating and drinking, £1.61 on entertainment and £0.96 on travel and transport, all decreases compared with previous years with the exception of shopping elsewhere in Bath. Staying visitors spent an average of £69.17 per person per night on accommodation in Bath, the highest level to date.
- Visitor satisfaction levels with their whole Bath Christmas Market experience, on the whole, increased across the board compared with the 2018 market. The highest average scores were for the quality of the stalls (4.50), overall atmosphere (4.46), the site decoration, lighting etc. (4.42) along with the range of stalls (4.40) as was also the case during previous years. 7 of the 11 indicators explored by the survey received an average score of 4.21 or more. Just 4 indicators received an average score of less than 4.00: the number of new traders (3.70), the visitor information available on site (3.71), the ease of finding your way around/signage (3.96) and the ease of getting around the site/accessing the stalls (3.97).
- At 4.43 out of 5.00, visitors' overall rating of Bath Christmas Market increased slightly compared to 2018 (4.41) but remained lower than during 2017 (4.49).

2019 Snapshot

- The 2019 Bath Christmas Market achieved a recommendation score of +46%, a slight decrease of -5% compared with the 2018 market score.
- Bath achieved a high recommendation score of +69%, compared with +68% in 2018.
- 68% of online survey respondents who said they had not visited the market during 2019 had visited the market previously (61% in 2018), 32% had never visited. 47% of lapsed visitors had last been to the market in 2018.
- When asked why they had not visited the market during 2019, 24% said it was too crowded – an increase of 8% compared with 2018. 20% said they went to another Christmas market instead (22% in 2018) and 16% said they would visit again in the future having been before – double the proportion saying this during the 2018 survey (8%). 12% said it was the distance from home/their accommodation (22% 2018).
- 20% (5 online respondents) visited another Christmas market instead of Bath. 40% (2 online respondents) said they chose the other market in direct preference to Bath (45% in 2018). Reasons for this included the other market having won Best Christmas Market in Europe for three years running and it being much more interesting, less crowded and having better parking.
- All associated spend for those attending the market was estimated at approximately £32.5 million (an increase of 4% compared with 2018) regardless of whether those attending were influenced to visit by the presence of the market or not.
- Total business turnover derived from all associated spend as a result of the market taking place was estimated at approximately £40.5m (£39.1m 2018). The number of FTE's supported as a result of all visitor spending was 463 or 633 actual jobs (466 and 642 during 2018 respectively).
- All associated additional spend was estimated at approximately £25 million - an increase of 4% compared with 2018. This is all spend connected to those attending the market for whom it was the main reason for their staying trip to Bath or the main reason for their day visit to the city – these are classed as influenced visitors and this is spend that would not have occurred had the market not taken place.
- Total business turnover derived from all additional associated spend as a result of the market taking place was estimated at approximately £31.5m (£30.6m 2018). The number of FTE's supported as a result of all additional visitor spending was 359 or 491 actual jobs (365 and 502 during 2018 respectively).

Bath Christmas Market Survey 2019



Key Findings & Recommendations



- Overall, approximately 403,000 people are estimated to have attended the Christmas Market in Bath over the 18 day period between Thursday 28th November and Sunday 15th December 2019. Of these, approximately 284,000 are estimated to have been 'unique' visitors to the event and when further analysed by those who said that the market was their main reason for visiting Bath (around three quarters of visitors to the market during 2019), an estimate of approximately 221,000 unique visitors was calculated. All associated additional spend as a result of the market taking place in the city during 2019 was estimated at approximately £25 million resulting in a total business turnover for Bath of approximately £31.5m, supporting 359 FTE's or 491 actual jobs in the city.
- A good proportion of visitors to the market are still choosing to stay in the city as part of their trip and are staying for longer and spending more on their accommodation. What is further encouraging is that 91% of staying visitors said they would consider returning to Bath for a short break at another time of the year including 75% during the summer, 74% in the spring and 63% in the autumn so any marketing plans in the future need to capitalise on these potential repeat visitors and ensure they promote what the city has to offer at these times of year.
- 2019 has however, seen a large increase in the proportion of day visitors on holiday who were staying overnight in Bristol compared with 2018 (26% in 2019 compared with 16% in 2018). It is possible that this is a contributing factor to the decrease in the proportion of staying visitors with people choosing to stay in Bristol and travel in to Bath for the day. A further 10% of day visitors on holiday were staying in Bradford on Avon – again, double the proportion doing so during 2018 (5%). Encouragingly, around half of day visitors to the market said they would consider staying overnight in Bath in the future as part of a visit to the Christmas market although a significant proportion (38% and including 26% of day visitors on holiday staying outside of Bath) said they wouldn't. It is recommended that any future research conducted explores the reasons for this in more detail to understand why this is the case.
- The proportion of adults with children groups visiting the market further decreased in 2019 to 8% (11% 2018) to the lowest level experienced since 2014 (6%) despite the introduction of more family orientated activities over the last couple of years so there remains a real opportunity to encourage more adults with children to visit the market. More focussed research may be necessary amongst this particular group to understand why they are not visiting the market or it may just be the case that awareness of the family orientated facilities and activities at the market is low and may need better promotion to encourage more people to visit in the future.
- Whilst visitors' satisfaction levels on the whole increased slightly compared with 2018, along with visitors' overall rating of Bath Christmas Market at 4.43 out of 5.00 during 2019, the recommendation score for the market did decrease again slightly year on year during 2019 to +46% (+51% 2018). Whilst it remains a good score it is clear that the market needs to continue to develop and adapt to continue to attract the large proportions of repeat visitors and attract new ones in an increasingly competitive marketplace.

STRENGTHS

- Key event in the run up to Christmas in the South West.
- Good geographical position with excellent road access from all directions along with good public transport links and the nearby airport.
- Staying visitors are staying for longer in the city as part of their visit to the market.
- Large proportion of SW residents but also a good spread of visitors from elsewhere in the UK.
- High levels of regular repeat visitors – seen as integral part of the Christmas festivities by many.
- Good levels of spend elsewhere in the city as a result of the market supporting the wider Bath visitor economy.
- High levels of visitor satisfaction with all aspects of the market.

WEAKNESSES

- Further decrease in adults visiting with children compared with 2016, 2017 and 2018.
- Increase in day visitors on holiday staying overnight in nearby Bristol rather than Bath.
- Over a third of day visitors would not consider incorporating an overnight visit to Bath as part of their visit to the market in the future – consider exploring the reasons for this being the case in future research undertaken.
- Over familiarity with the market amongst regular, repeat visitors so it must continue to add to the products on offer to continue to retain these visitors.

OPPORTUNITIES

- Scope to attract more families/be more family friendly with high levels of interest in increasing the range of activities and offerings at the market aimed at families in the future.
- Healthy levels of interest amongst staying visitors in visiting Bath during other times of the year.
- Good levels of interest amongst day visitors of incorporating an overnight visit to Bath as part of their visit to the market in the future.

THREATS

- Competition from more and more cities now running their own Christmas Markets – 22% of lapsed visitors said then went to another market instead of Bath during 2019.
- Continuing uncertain economic climate and its' impact on visitor spending.

Bath Christmas Market Survey 2019



Introduction



Background

This report presents the combined findings of a face to face survey of visitors to Bath Christmas Market conducted between the 28th November and 15th December 2019 and an additional online survey conducted between 20th December 2019 and 9th January 2020. It was commissioned by Visit Bath and undertaken by The South West Research Company Ltd. This is the twelfth time that research into Bath Christmas Market has been undertaken, the first survey being in 2003.

Like previous surveys years, the 2019 research was designed to provide up-to-date information on the profile, origin and perceptions of visitors to Bath Christmas Market. In addition, it was designed to enable comparisons to be made with the previous visitor surveys conducted between 2003 and 2018 in order to monitor improvements made to the Christmas Market product through local initiatives.

Research objectives

- To collect up-to-date information on the origin, profile, behaviour and opinions of visitors to help improve understanding of the impact of it and provide the basis for tourism policies.
- Where possible to make comparisons with the previous studies undertaken between 2003 and 2018 to identify any emerging trends and monitor any improvements made in order that informed decisions can continue to be made in relation to marketing initiatives and facility provision.
- To provide information on the average level and composition of visitor expenditure in the area.

Methodology

- A face to face questionnaire survey was conducted by experienced interviewers between the 28th November and 15th December 2019.
- Adults (aged 16+ yrs) were sampled on a random basis in and around the area occupied by Bath Christmas Market.
- 16 interviewing sessions, each lasting approximately 6 hours (typically between 10am and 4pm), were undertaken over the survey period.
- A total of 400 questionnaires were completed.
- In addition to the face to face survey, a link to an online version of the survey was also emailed out to all those on the Bath Christmas Market database who had requested information from Visit Bath about visiting the market.
- The email containing the survey link was sent out a few days after the market had finished on Friday 20th December 2019.
- A total of 365 useable online survey responses were submitted by the closing date including 340 respondents who had visited the 2019 market and 25 non/lapsed visitors which were included in this research.
- The two approaches above resulted in a combined survey sample of 740 respondents who had visited the 2019 Bath Christmas Market and 25 non/lapsed visitors for analysis purposes.

Analysis segments

Throughout this report results are presented for all visitors as well as a breakdown by visitor type. A number of additional analysis segments have also been derived from the survey data to aid with the interpretation of findings and the understanding gained through this research where useful and appropriate within the report.

The survey analysis segments and their associated sample sizes are shown below. The abbreviations used for each segment type throughout this report are also shown in brackets.

Survey method:

- Face to face survey (sample 400) **(F2F)**
- Online survey (sample 340) **(ONLINE)**

Visitor type:

- Local resident (Sample 92) **(LOCAL)**
- Day visitor (Sample 469) **(DAY)**
- Staying visitor in Bath (Sample 179) **(STAYING)**

Group composition:

- Adults visiting with children (Sample 33) **(ADULTS WITH CHILDREN)**
- Adults visiting without children (Sample 366) **(ADULTS ONLY)**

Previous visitors to Bath Christmas Market:

- First time visitor to Bath (Sample 94) **(FIRST TIME BATH)**
- First time visitor to Bath Christmas Market (Sample 172) **(FIRST TIME BCM)**
- Repeat visitor to Bath Christmas Market (Sample 382) **(REPEAT BCM)**

Bath Christmas Market main reason for visiting Bath:

- Market main reason for visiting Bath (Sample 581) **(MAIN REASON)**
- Market not main reason for visiting Bath (Sample 155) **(OTHER REASON)**

Statistical reliability

- All sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered.
- The survey results in this report are presented for ‘all visitors’ and separately for Bath ‘residents’, ‘day visitors’ and ‘staying visitors’ (as well as a number of additional sub-groups identified overleaf where applicable to do so). The table below shows the samples achieved in each of these categories and gives the margins within which one can be 95% certain that the true figures will fall (assuming the sample is random).
- The figures shown are at the 95% confidence limits. Thus, for example, we can be 95% certain that, for all visitors, with a result of 50%, the true percentage is the range 46.4% to 53.6%. For the ‘staying visitors’ sample the confidence limits are much wider 42.7% to 57.3%.
- The margins of error shown below should be borne in mind when interpreting the results contained in this report.

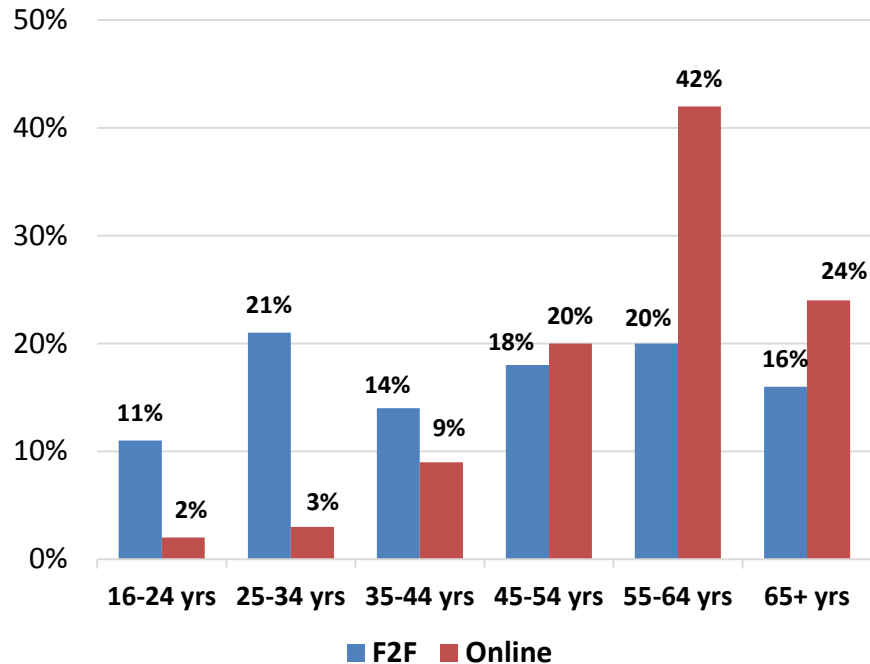
	All Visitors	Bath residents	Day visitors	Staying visitors
Research findings	Sample: 740	Sample: 92	Sample: 469	Sample: 179
10% or 90%	+/- 2.2%	+/- 6.1%	+/- 2.7%	+/- 4.4%
20% or 80%	+/- 2.9%	+/- 8.2%	+/- 3.6%	+/- 5.9%
30% or 70%	+/- 3.3%	+/- 9.4%	+/- 4.1%	+/- 6.7%
40% or 60%	+/- 3.5%	+/- 10.0%	+/- 4.4%	+/- 7.2%
50%	+/- 3.6%	+/- 10.2%	+/- 4.5%	+/- 7.3%

Trend data 2003 - 2019

- Due to the number of years that the survey has been undertaken it is becoming increasingly difficult to include a full breakdown of all the survey results by all the survey years in the main report. There was also a change in methodology from the 2014 survey onwards to include both a face to face and online survey.
- The results in the slides to follow therefore concentrate on the 2019 survey data, along with a breakdown of this data by the analysis segments identified on the previous page. Also provided is a comparison with the 2014 – 2018 survey results for all visitors only.
- For a full breakdown of the **face to face survey results only** by survey year (2003-2019) please refer to the Trend data 2003 – 2019 chapter at the back of this report.

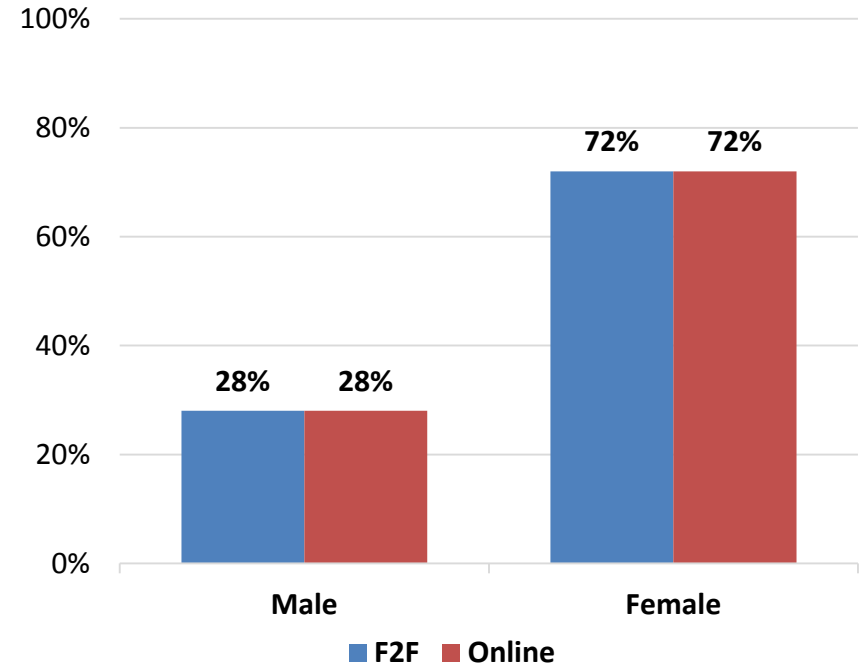
Whilst there was a good spread of survey respondents across all age groups for both survey methods the large majority of survey respondents were female.

Survey respondent age group



Lower proportions of online survey respondents were aged 16-24 years (2%), 25-34 years (3%) and 35-44 years (9%) compared with those taking part in the survey face to face at the market (11%, 21% and 14% respectively). In contrast, higher proportions of online survey respondents were aged 45-54 years (20%), 55-64 years (42%) and 65+ years (24%) compared with face to face respondents (18%, 20% and 16% respectively).

Survey respondent gender



The proportion of males and females participating in both the F2F and online surveys was the same at 28% and 72% respectively.

Bath Christmas Market Survey 2019

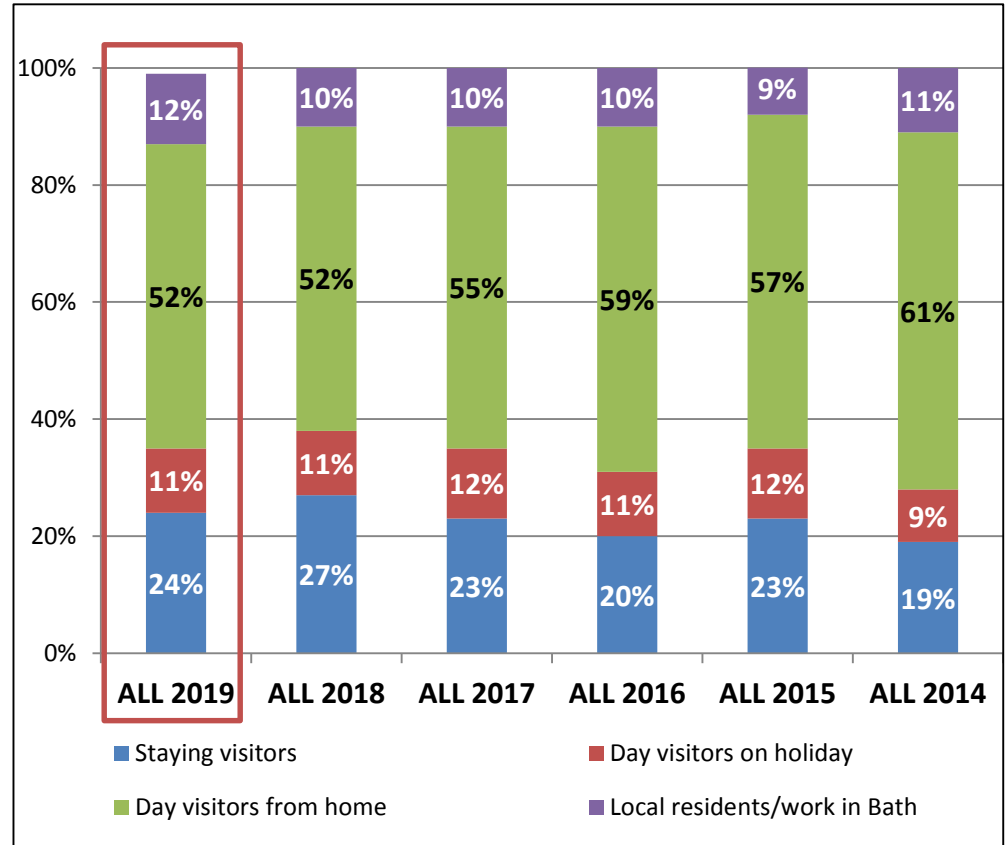


Visitor Profile



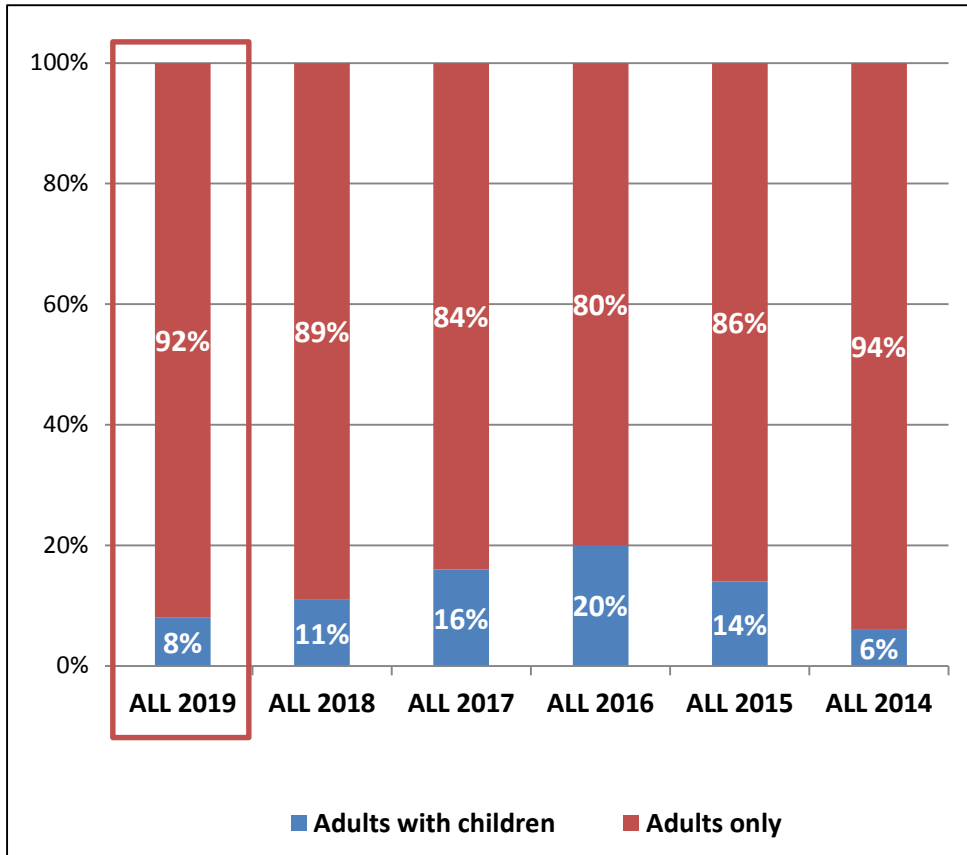
Staying visitors decreased slightly whilst local residents increased.

- At 24%, 2019 has seen a 3% points decrease in the proportion of staying visitors to the market compared to 2018 (27%), although this still represents a 5% points increase since the 2014 survey (19%). Although the same as in 2018, at 63%, the proportion of day visitors has been decreasing (67% 2017 and 70% 2014). The proportion of local residents during 2019 increased by 2% points to its highest level at 12% (10% 2018).
- Looking at the analysis segments higher proportions of first time visitors to Bath and to the Christmas market were staying overnight in the city or visiting for the day from a holiday base outside the city. A higher proportion of adults visiting with children were on a day visit from home.
- Amongst those visitors who said the market was their main reason for visiting Bath 57% were on a day visit from home compared with just 33% of respondents visiting the city for an other reason.



Visitor type	ALL 2019	F2F	ONLINE	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Staying visitors	24%	19%	31%	6%	20%	43%	34%	21%	23%	27%
Day visitors on holiday	11%	9%	15%	6%	9%	20%	19%	9%	12%	11%
Day visitors from home	52%	55%	48%	76%	53%	37%	47%	70%	57%	33%
Local residents / work in Bath	12%	18%	6%	12%	18%	-	-	-	8%	29%

Groups visiting the market with children are declining.



- The proportion of adults with children groups further decreased year on year in 2019 to 8% (11% 2018) to the lowest level experienced since 2014 (6%).
- The average group size at 2.15 people (0.11 children and 2.04 adults) was the lowest recorded over the six year period and compared with 3.42 people during 2018.

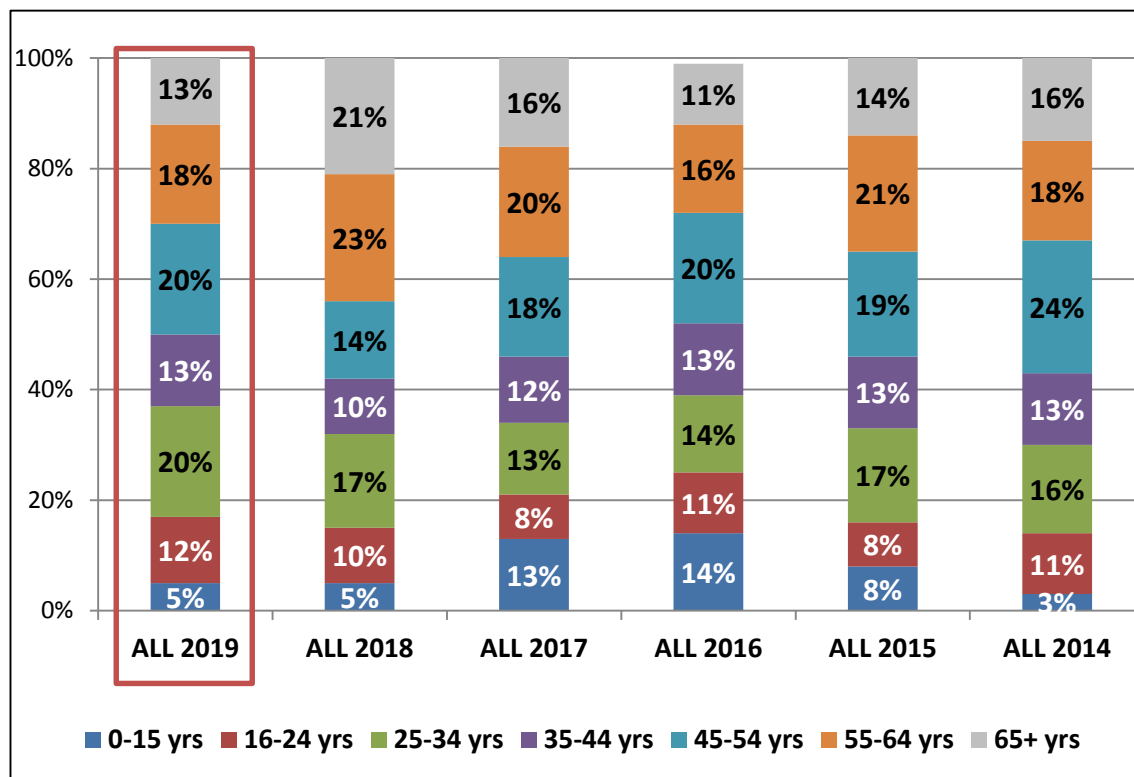
	2019	2018	2017	2016	2015	2014
Ave. children	0.11	0.18	0.42	0.50	3.15	2.33
Ave. adults	2.04	3.24	2.75	3.18		
Total ave. people	2.15	3.42	3.17	3.68		

- Looking at the analysis segments only 3% of staying visitors and 4% of first time visitors to the market were visiting with children.

Group composition	ALL 2019	F2F	LOCAL	DAY	STAYING	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Adults with children	8%	8%	6%	11%	3%	8%	4%	12%	9%	5%
Adults only	92%	92%	94%	89%	97%	92%	96%	88%	91%	95%

Increase in younger and middle-aged adult visitors in 2019.

- The key changes in age profile compared to 2018 were a 6% increase in visitors aged 45-54 years (20% 2019 & 14% in 2018), a 3% increase in visitors aged 35-44 years (13% 2019 & 10% in 2018), a 3% increase in visitors aged 25-34 years (20% 2019 & 17% in 2018), a 2% increase in visitors aged 16-24 years (12% 2019 & 10% in 2018), an 8% decrease in those aged 65+ years (13% 2019 & 21% in 2018) and a 5% decrease in those aged 55-64 years (18% 2019 & 23% 2018).
- The proportions of visitors aged 0-15 years remained the same as last year at 5%.
- Day and staying visitors showed a similar profile in terms of age and were typically older than local residents.

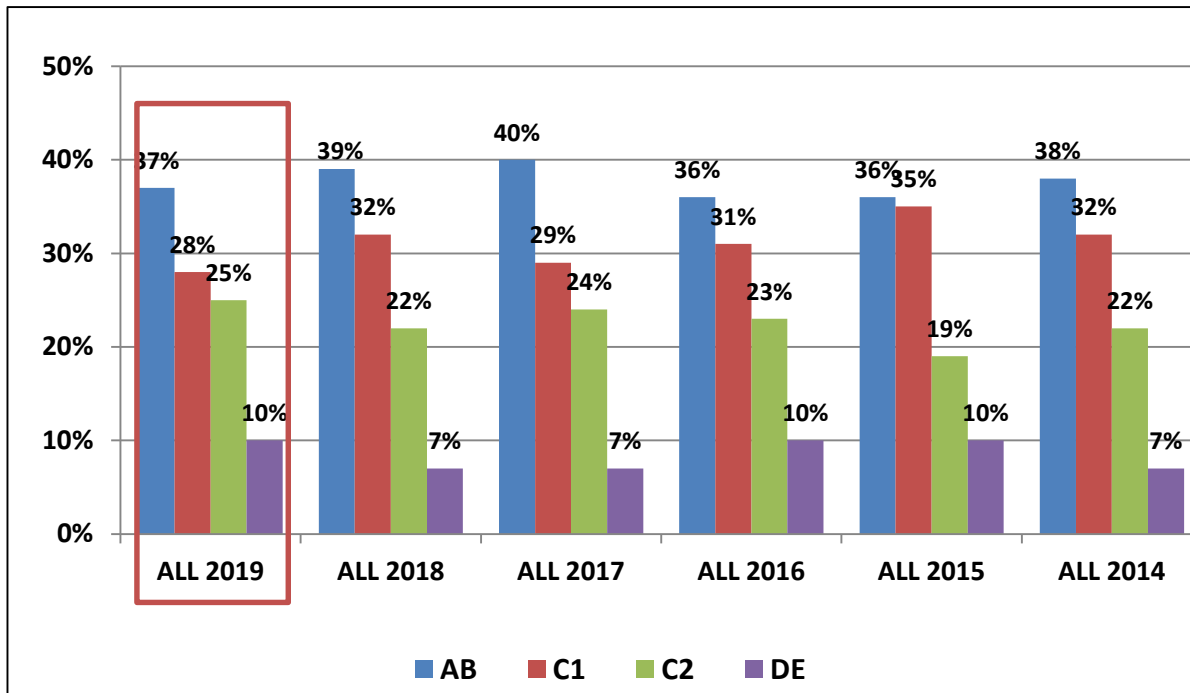
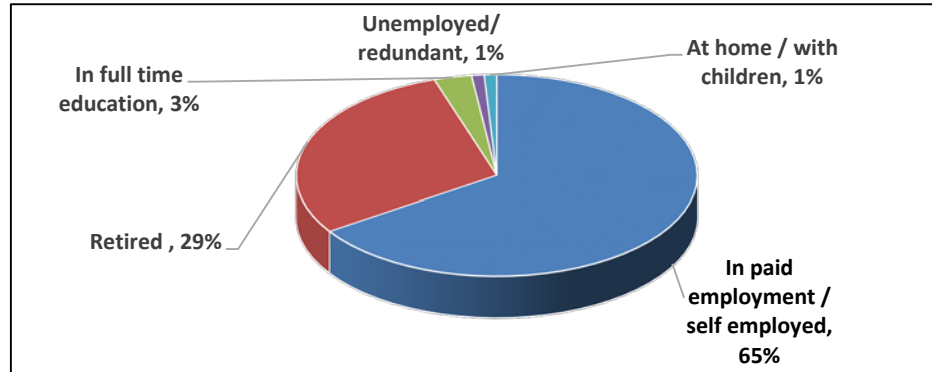


Age group of people in party / gender	ALL 2019	F2F	LOCAL	DAY	STAYING
0-15 years	5%	5%	4%	6%	2%
16-24 years	12%	12%	28%	10%	6%
25-34 years	20%	20%	20%	20%	20%
35-44 years	13%	13%	11%	13%	11%
45-54 years	20%	20%	14%	20%	21%
55-64 years	18%	18%	14%	18%	21%
65+ years	13%	13%	9%	12%	10%
Male	34%	34%	34%	34%	37%
Female	66%	66%	66%	66%	63%

The socio demographic profile of visitors remains similar to previous years.

Socio economic group AB provided 37% of visitors.

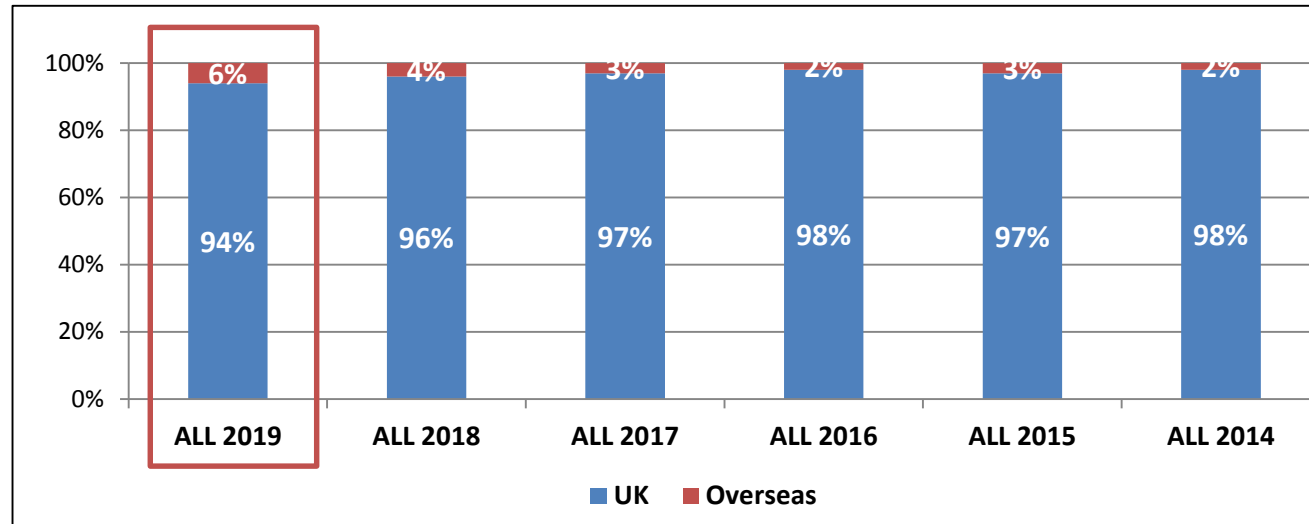
- The vast majority of visitors were either in paid employment or self employed (65%).
- The largest proportion of visitors were classified in group AB, as has been the case in all previous years. At 37%, the proportion of ABs visiting the market during 2019 was 2% points lower than during 2018 (39%) and compares with 22.17% for the UK population as a whole.



Social Grade	Description	% HRP population (UK)
AB	Higher & intermediate managerial, administrative, professional occupations	22.17
C1	Supervisory, clerical & junior managerial, administrative, professional occupations	30.84
C2	Skilled manual occupations	20.94
DE	Semi-skilled & unskilled manual occupations, Unemployed and lowest grade occupations	26.05

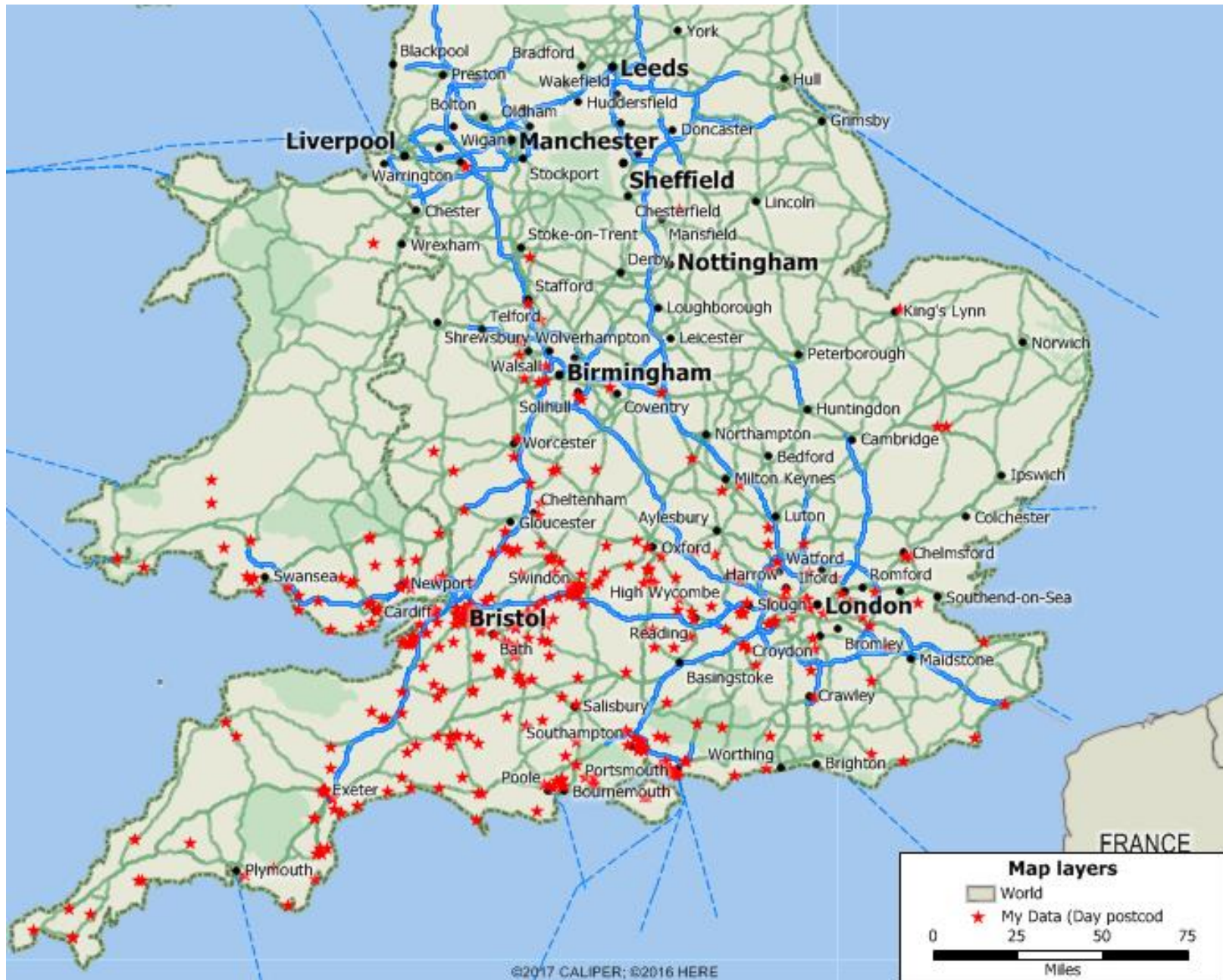
The proportions of UK and overseas visitors remained similar to previous years. 49% of all visitors lived in the South West region.

- Overall the proportions UK and overseas visitors to the market in 2019 were similar to previous years. 94% were from the UK and 6% were from overseas. Half of all visitors lived in the South West of England (same as during 2018) including 15% within a BA postcode area (13% 2018) and 45% lived elsewhere in the UK (46% 2018). The postcodes of both day and staying visitors during 2019 have been mapped in the slides to follows.



Postcode area	% of all visitors	Postcode area	% of all visitors	Postcode area	% of all visitors
Bath	15.41%	Southampton	2.85%	Guildford	1.14%
Bristol	8.70%	Reading	2.71%	Hemel Hempstead	1.14%
Swindon	6.99%	Oxford	2.28%	Salisbury	1.14%
Cardiff	3.99%	Newport	2.14%	Torquay	1.14%
Bournemouth	3.42%	Birmingham	1.57%	Truro	1.14%
Portsmouth	3.42%	Taunton	1.57%	Tonbridge	1.00%
Exeter	3.28%	Dorchester	1.43%	Other UK (< 1% each)	18.12%
Gloucester	3.28%	Plymouth	1.28%	Overseas	6.42%
Swansea	3.14%	Redhill	1.28%		

Day visitors postcode map.



Staying visitors postcode map.



Bath Christmas Market Survey 2019



Characteristics of Visits



The duration of stay in Bath amongst those staying overnight in the city increased to its highest level to date.

The Friday to Sunday periods remained the peak days for visiting the market.

- At 2.27 nights, the average length of stay amongst those visitors staying overnight in Bath increased to its highest level to date (2.01 nights during 2018, 1.79 nights during 2017, 1.89 nights during 2016, 1.97 nights during 2015 and 2.17 nights during 2014).
- Attendance at the market (amongst online survey respondents) was highest during the Friday to Sunday periods with the peak weekend being Friday 6th Dec to Sunday 8th Dec. 14% of online respondents said they visited the market on Saturday 7th December, 12% on Friday 29th November, 11% in each case on Saturday 30th November and Monday 9th December and 10% in each case on Monday 2nd December, Thursday 5th December, Friday 6th December and Sunday 8th December.
- 14% of online respondents said they had visited on Saturday 7th December compared with 9% on the equivalent Saturday during 2018 (8th Dec) whilst 10% had done so on Sunday 8th Dec – double the proportion during the equivalent Sunday during 2018 (5%, 9th Dec).

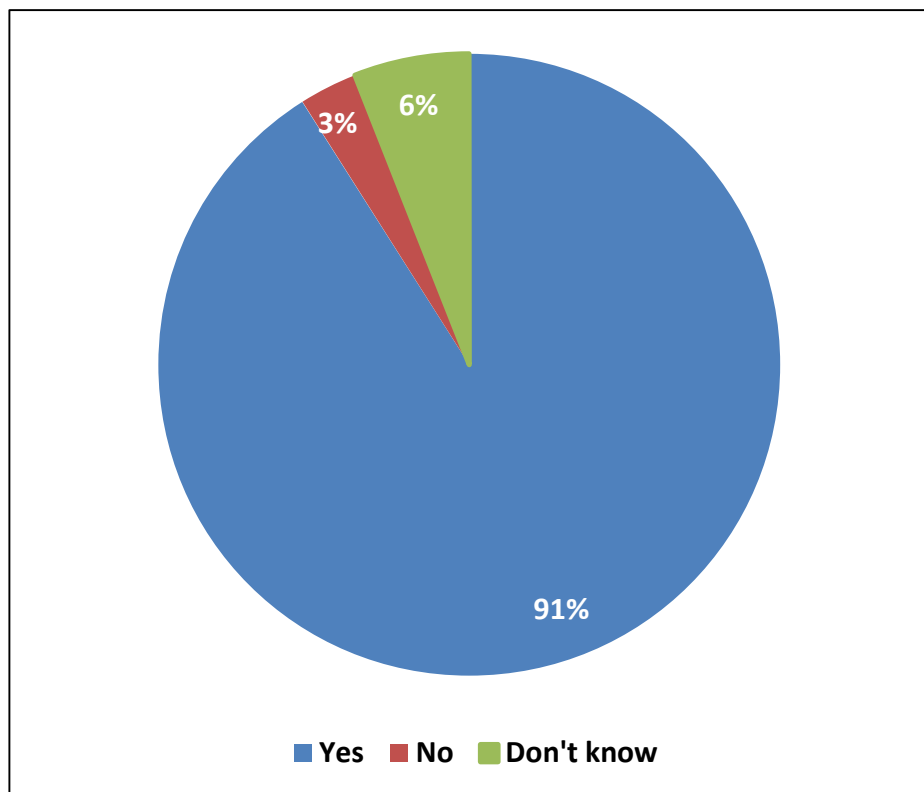
Days when visited the market (online respondents only)							
Thursday 28 th Nov	7%	Tuesday 3 rd Dec	8%	Sunday 8 th Dec	10%	Friday 13 th Dec	8%
Friday 29 th Nov	12%	Wednesday 4 th Dec	9%	Monday 9 th Dec	11%	Saturday 14 th Dec	6%
Saturday 30 th Nov	11%	Thursday 5 th Dec	10%	Tuesday 10 th Dec	6%	Sunday 15 th Dec	4%
Sunday 1 st Dec	9%	Friday 6 th Dec	10%	Wednesday 11 th Dec	8%	Don't know/can't remember	1%
Monday 2 nd Dec	10%	Saturday 7 th Dec	14%	Thursday 12 th Dec	6%		

26% of day visitors on holiday were staying in nearby Bristol.

26% of day visitors on holiday were staying in Bristol. This represents a large increase compared with 2018 (16%) and is likely to be one of the factors contributing to the decrease in staying visitors to the market during 2019 with a large increase in days visitors on holiday staying in Bristol rather than Bath and just coming to the city and market for the day rather than staying overnight. A further 10% of day visitors on holiday were staying in Bradford on Avon (5% in 2018).

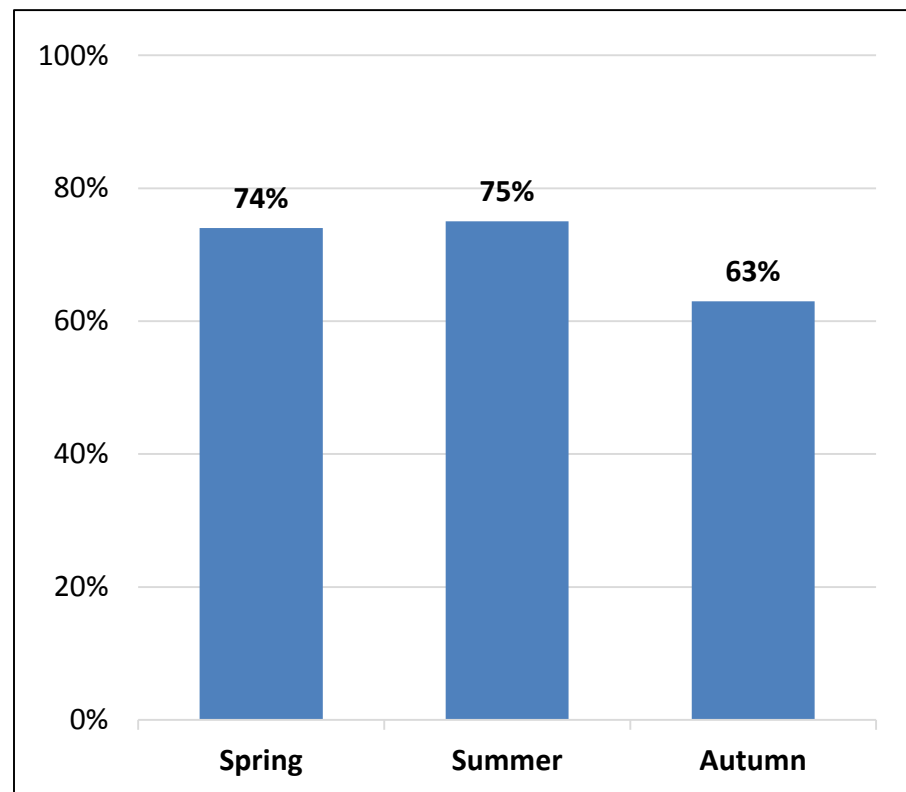
Location	% of all day visitors on holiday	Location	% of all day visitors on holiday
Bristol	26%	Frome	1%
Bradford on Avon	10%	Glastonbury	1%
Chippenham	6%	High Littleton	1%
Swindon	4%	Keevil	1%
Westbury	4%	Litton	1%
Beckington	2%	Malmesbury	1%
Castle Combe	2%	Monkton Coombe	1%
Corsham	2%	Ninlet	1%
London	2%	Peasedown	1%
Longleat	2%	Salisbury	1%
Burrington	1%	The Cotswolds	1%
Cardiff	1%	Tomaton	1%
Castle Cary	1%	Trowbridge	1%
Chard	1%	Warminster	1%
Cheddar	1%	Warmley	1%
Cheltenham	1%	Watford	1%
Clifton	1%	Weston-super-Mare	1%
Devizes	1%	Willow	1%
Dyrham	1%	Wincanton	1%
Exeter	1%	Yeovil	1%
Farnborough	1%		

Around 9 out of 10 staying visitors said they would consider returning to Bath for a short break at another time of the year. 75% would consider visiting in Summer and 74% in the Spring.



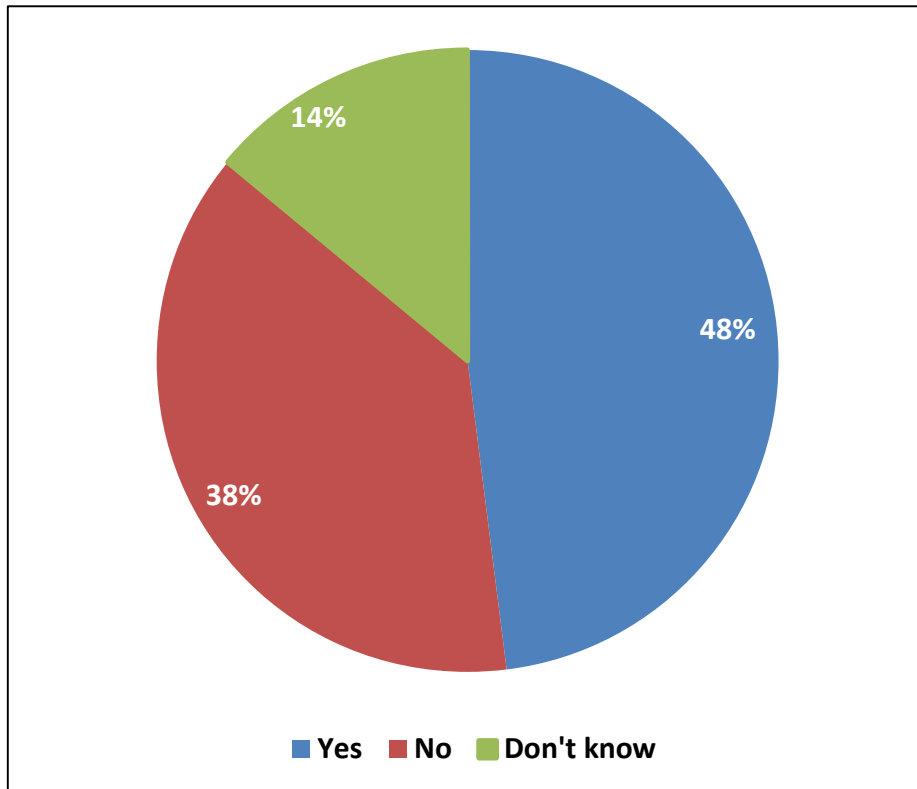
Those visitors staying overnight in the city were asked if they would consider returning to Bath for a short break at any other time of the year.

91% said they would, 6% didn't know and 3% said they wouldn't.



When asked during which other times of the year they would consider visiting Bath for a short break, 75% said in the summer, 74% in the spring and 63% in the autumn.

Around half of all day visitors said they would consider staying overnight in Bath in the future as part of a visit to the Christmas market.

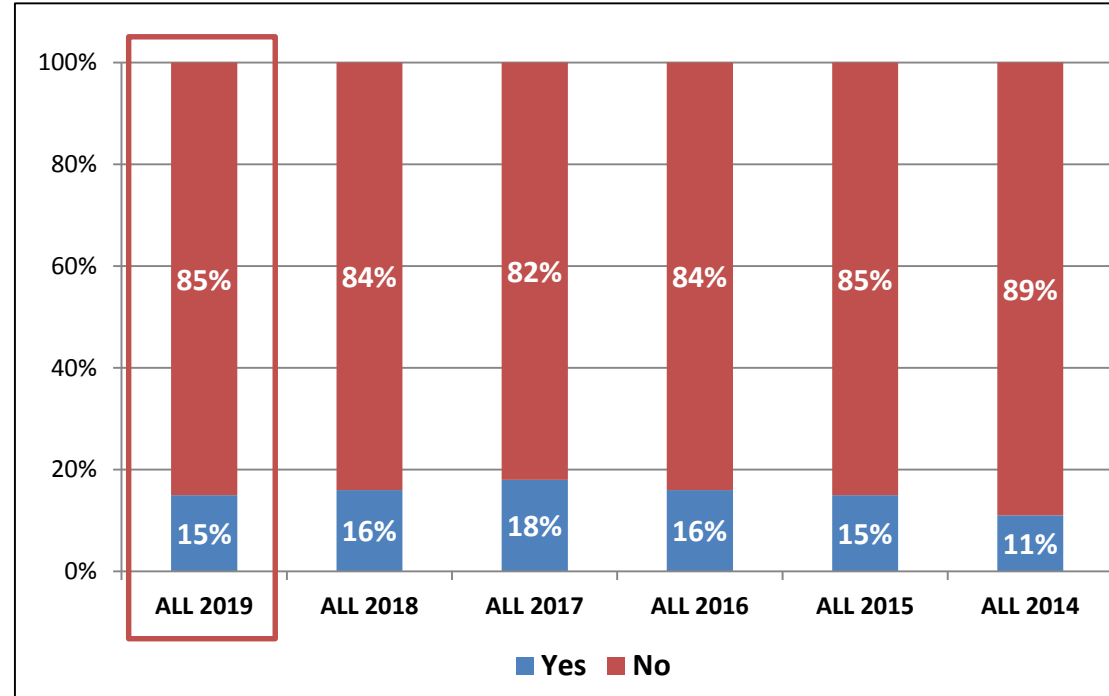


Day visitors to the market were asked if they would consider staying overnight in Bath in the future as part of a visit to the Christmas market.

48% said they would, 38% said they wouldn't and 14% didn't know.

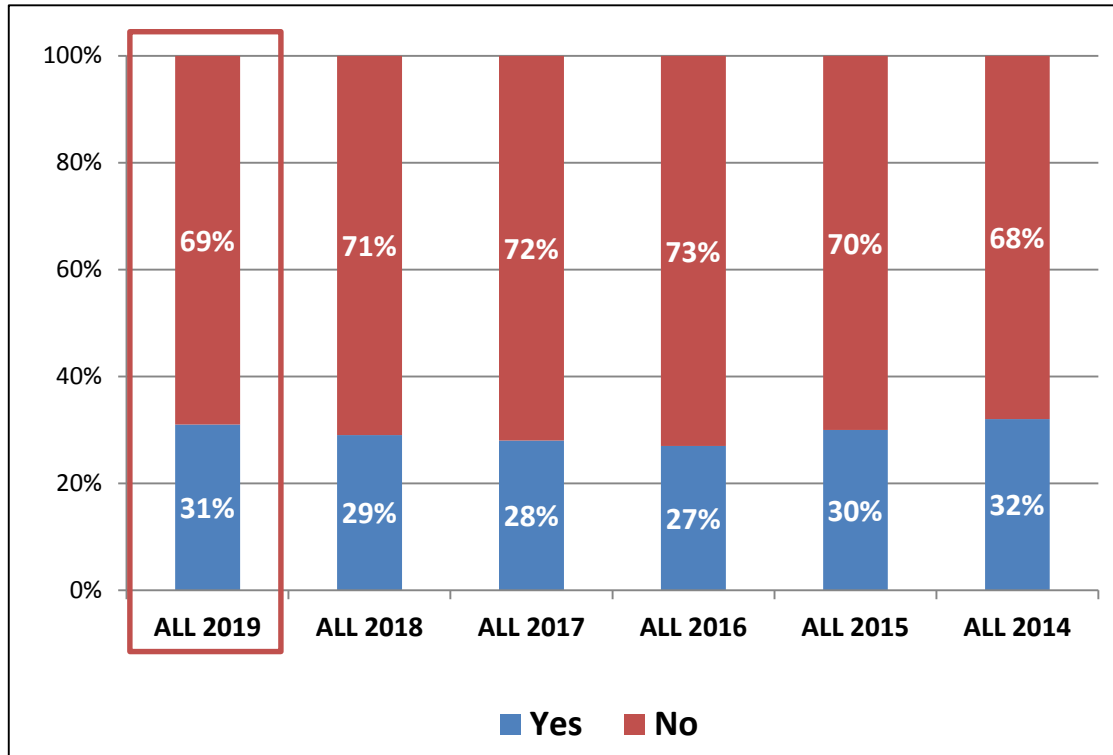
First time visitors to Bath remains similar to previous years.

- The proportion of first time visitors to Bath at 15% remained similar to previous years (16% 2018).
- Looking at the analysis segments a higher proportion of staying were on their first ever visit to the city (22%) compared with day visitors (12%)..
- There was little variation in the results for the other analysis segments.



Whether first ever visit to Bath	ALL 2019	F2F	ONLINE	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	MAIN REASON	OTHER REASON
Yes	15%	19%	9%	12%	22%	17%	20%	14%	17%
No	85%	81%	91%	88%	78%	83%	80%	86%	83%

The market continues to attract good proportions of new visitors each year.



- Survey respondents on a repeat visit to the city were also asked whether it was the first time they had visited the Bath Christmas Market.
- At 31%, the proportion of first time visitors to the Christmas market remained similar to previous years.
- 42% of staying visitors, 35% of face to face survey respondents and 37% of adult only groups were visiting the Christmas Market for the first time.

Whether first ever visit to Bath Christmas Market (repeat visitors to Bath only)	ALL 2019	F2F	ONLINE	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	MAIN REASON	OTHER REASON
Yes	31%	35%	27%	27%	42%	17%	37%	31%	30%
No	69%	65%	73%	73%	58%	83%	63%	69%	70%

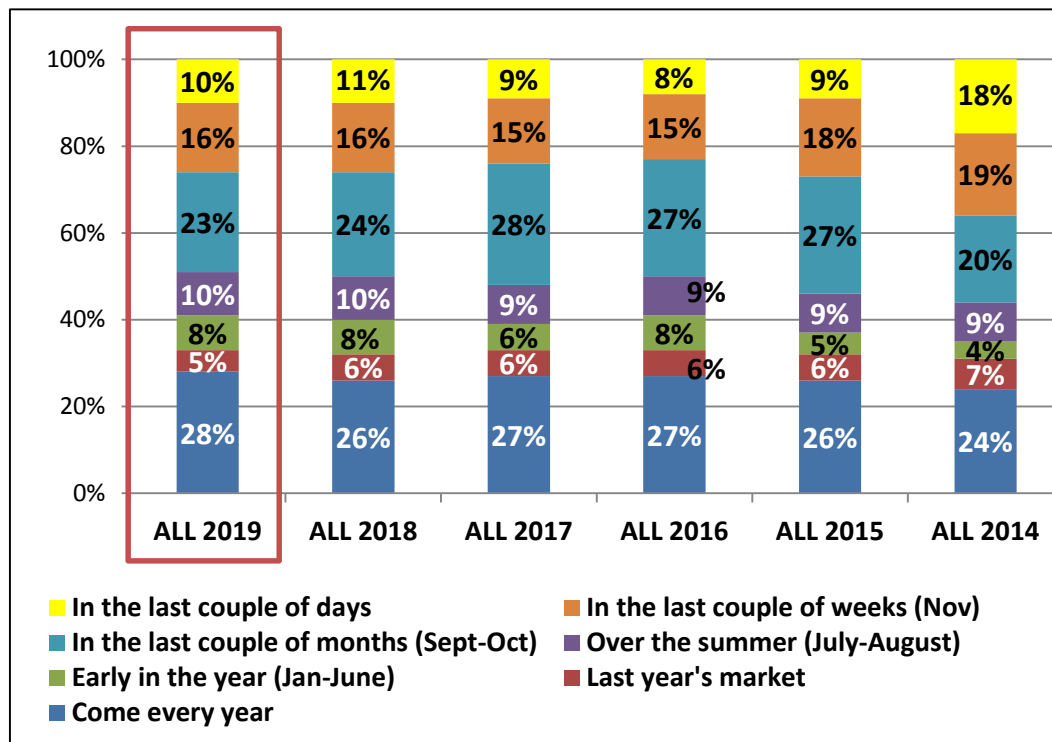
Dwell time at the market remains high.

- On average visitors had spent 4.28 hours or 4 hours 17 minutes at the Christmas Market during 2019 – just 3 minutes shorter than during 2018 (4.33 hours or 4 hours 20 minutes).
- Staying visitors had typically spent the longest amount of time at the Christmas Market – 5.12 hours or 5 hours 7 minutes compared with 4.38 hours for day visitors (4 hours and 23 minutes) and 2.29 hours for local residents/workers (2 hours 17 minutes). Online respondents, first time visitors to Bath, first time visitors to the market and those who said the market was the main reason for them visiting Bath had all spent at least 4 hours or more on site.

Average duration of stay at the market (hours)			Average duration of stay at the market (hours)		
ALL 2019	4.28	4 hours 17 minutes	ADULTS WITH CHILDREN	3.18	3 hours 11 minutes
ALL 2018	4.33	4 hours 20 minutes	ADULTS ONLY	3.81	3 hours 49 minutes
ALL 2017	4.42	4 hours 25 minutes	FIRST TIME BATH	5.20	5 hours 12 minutes
ALL 2016	4.15	4 hours 9 minutes	FIRST TIME BCM	4.65	4 hours 39 minutes
ALL 2015	4.11	4 hours 7 minutes	REPEAT BCM	4.36	4 hours 22 minutes
ALL 2014	3.92	3 hours 55 minutes	MAIN REASON	4.59	4 hours 35 minutes
F2F	3.76	3 hours 46 minutes	OTHER REASON	3.16	3 hours 10 minutes
ONLINE	4.94	4 hours 56 minutes			
LOCAL	2.29	2 hours 17 minutes			
DAY	4.38	4 hours 23 minutes			
STAYING	5.12	5 hours 7 minutes			

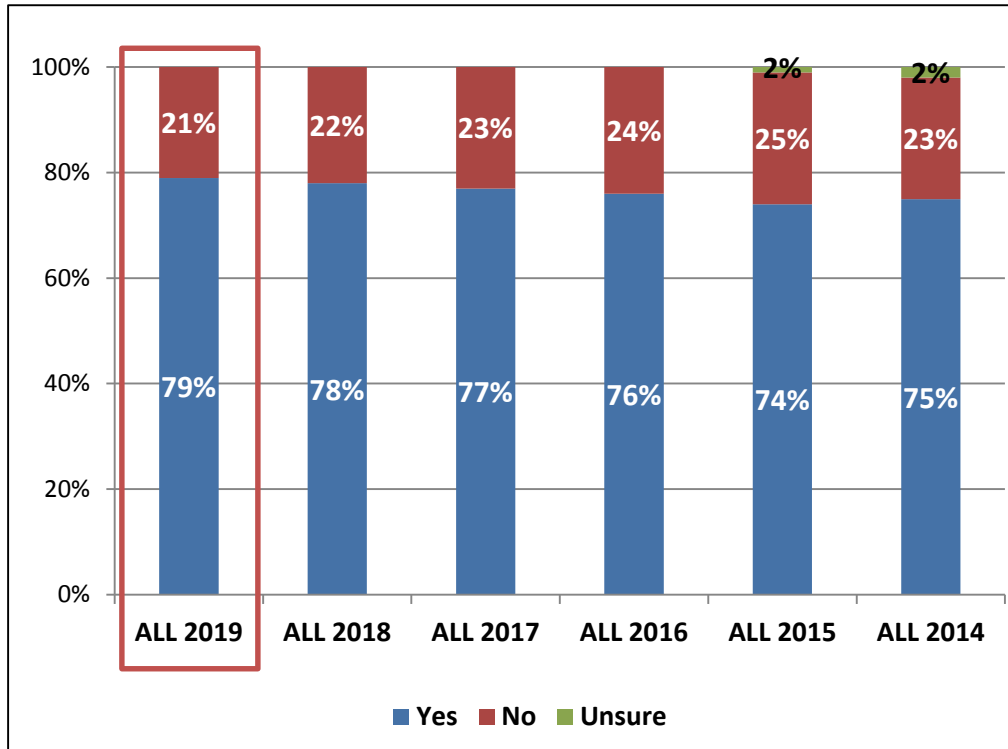
September onwards is the key period for decision making.

- In a similar manner to 2018, approximately half of respondents made the decision to visit within two months of the market taking place with a third visiting every year (28%) or deciding at last years market (5%).
- 47% of face to face survey respondents had decided to visit either a couple of months (26%) or a couple of weeks (21%) before the market took place, along with 43% of day visitors, 63% of first time visitors to Bath and 55% of first time visitors to the market.
- Staying visitors (35%), first time visitors to the market (32%) and first time visitors to Bath and the market (33% in each case) were the most likely to have planned their visit to the market further in advance (either over the summer or earlier in 2019).



When decided to visit the market	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Come every year	28%	22%	35%	53%	28%	16%	30%	22%	3%	-	41%	28%	29%
In the last couple of months (Sept-Oct)	23%	26%	19%	3%	23%	31%	12%	27%	46%	35%	16%	23%	22%
In the last couple of weeks (Nov)	16%	21%	10%	12%	20%	6%	30%	20%	17%	20%	15%	16%	14%
Over the summer (July-August)	10%	7%	15%	-	9%	19%	3%	7%	21%	17%	7%	10%	9%
In the last couple of days	10%	15%	4%	27%	9%	5%	18%	14%	1%	10%	8%	8%	16%
Early in the year (Jan-June)	8%	5%	12%	-	7%	16%	6%	5%	12%	16%	6%	9%	5%
Last year's market	5%	5%	5%	5%	5%	7%	-	6%	-	2%	8%	6%	3%

The market continues to be the main draw for the large majority of visitors to Bath.

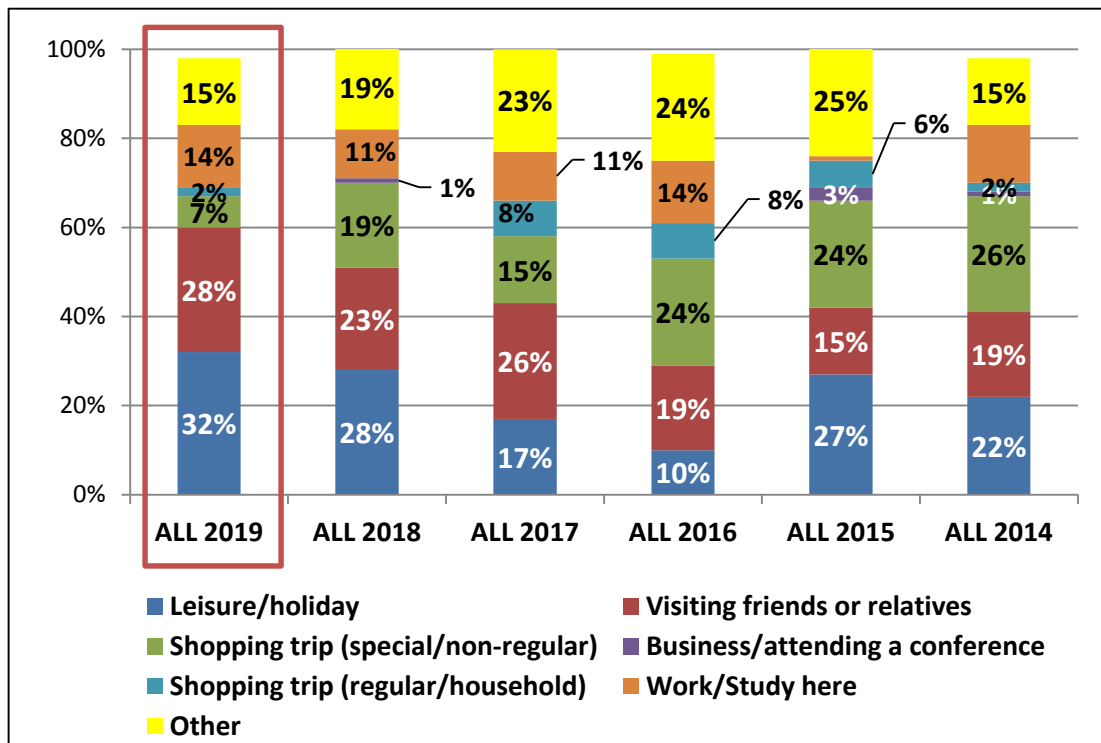


- 79% of visitors indicated that the Christmas Market was their main reason for visiting the city, a similar proportion to previous years (78%, 77%, 76%, 74% and 75% during 2018, 2017, 2016, 2015 and 2014 respectively).
- 85% of day visitors to the city, 80% of first time visitors to Bath and 84% of first time visitors to the market said it was their main reason for choosing to visit.
- Half of all local residents said the market was their main reason for choosing to visit Bath.

Whether market was main reason for visiting Bath	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM
Yes	79%	78%	80%	50%	85%	76%	88%	77%	80%	84%	83%
No	21%	22%	20%	50%	15%	24%	12%	23%	20%	16%	17%

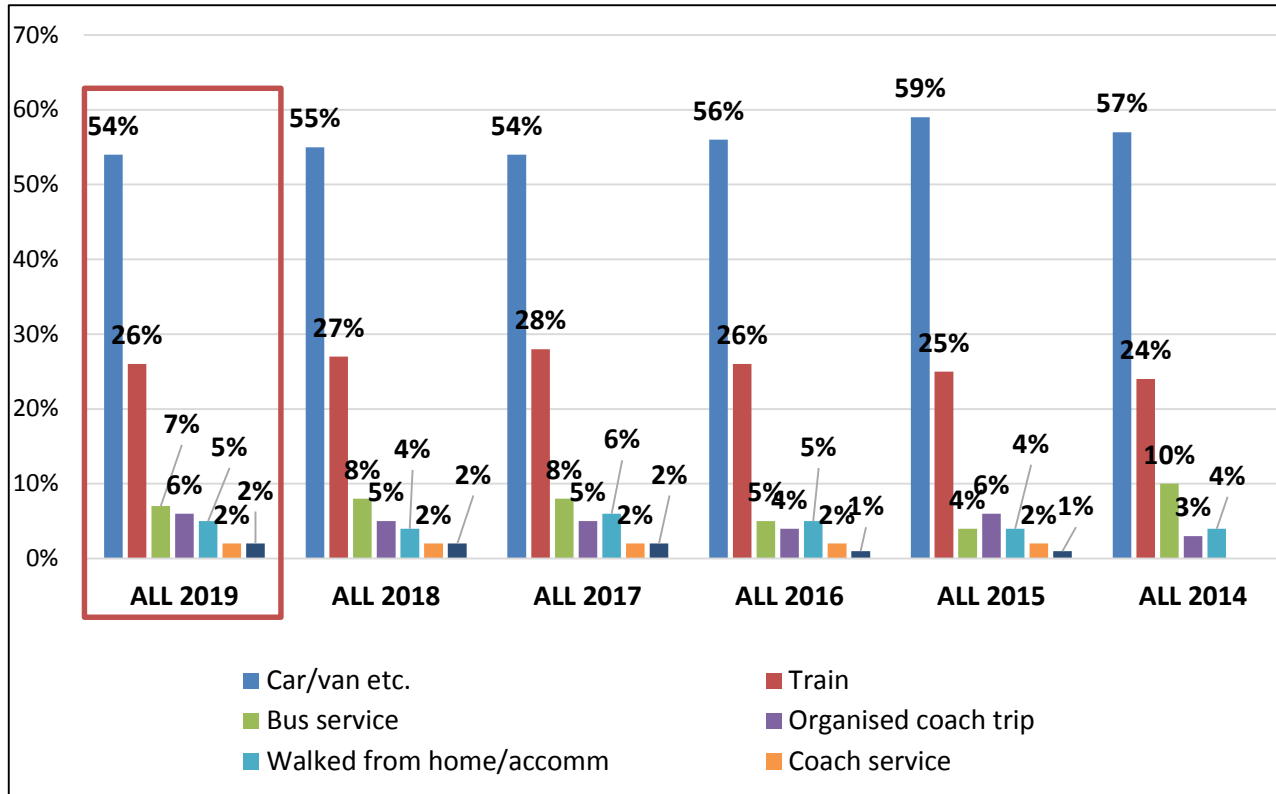
For those not visiting because of the market leisure/holiday and visiting friends/relatives are the main motivators.

- 32% of respondents whose main reason for visiting Bath was not because of market said they were visiting as part of a leisure/holiday trip to Bath (28% in 2018) and 28% were visiting friends or relatives who lived in the city (23% in 2018).
- 14% of all respondents said they worked or studied in the city, 7% were on a special shopping trip and 2% a regular/household shopping trip.
- A further breakdown of all respondents answering this question by analysis segment is shown in the table below and to see the list of 'other' reasons for visiting Bath (15% of all respondents) please refer to the appendix which accompanies this report.



Main reason for visiting Bath (those for whom the market was not the main reason for visit)	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM
Leisure/holiday	32%	34%	28%	2%	35%	62%	50%	34%	74%	43%	36%
Visiting friends or relatives	28%	26%	32%	7%	45%	27%	-	28%	21%	57%	36%
Other	15%	9%	26%	29%	9%	8%	25%	8%	5%	-	14%
Work/Study here	14%	15%	13%	43%	-	3%	25%	14%	-	-	2%
Shopping trip (Special/Non-regular)	7%	10%	2%	10%	11%	-	-	11%	-	-	12%
Shopping trip (regular/ household)	2%	3%	-	7%	-	-	-	4%	-	-	-
Language student	1%	1%	-	2%	-	-	-	1%	-	-	37

Road transport accounted for 69% of visits.

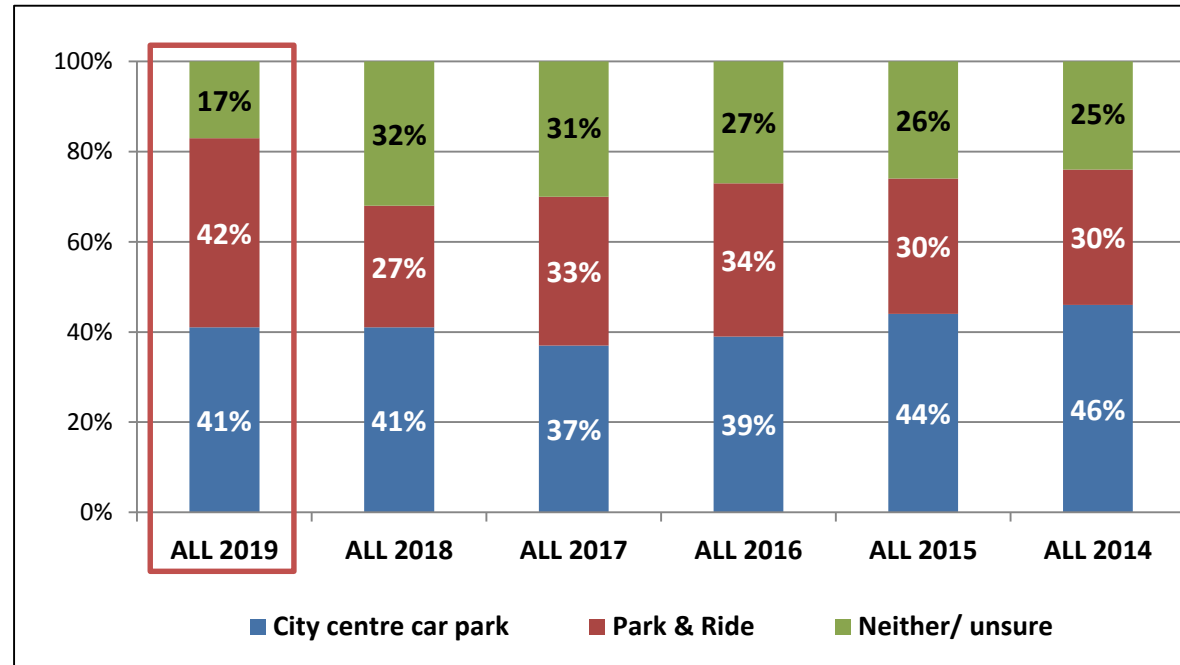


- Car/van etc. (54%) was the most popular form of transport used to travel to Bath – a similar proportion to previous years.
- A further 15% of visitors also travelled by road either as part of an organised coach tour (6%) or on a bus (7%) or coach service (2%).
- Around a quarter of visitors had travelled to Bath on the train (26%) with this proportion decreasing by 1% compared with 2018.
- A higher proportion of staying visitors (60%) and adults with children (55%) had travelled to the city by car, van etc. Around a third of day visitors (31%), 28% of first time visitors to the city and 31% of first time visitors to the market had arrived in the city by train whilst 25% of local residents had walked from their own homes.

How travelled to Bath	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Car/van etc.	54%	50%	57%	37%	54%	60%	55%	50%	48%	54%	59%	55%	47%
Train	26%	24%	29%	2%	31%	25%	27%	24%	28%	31%	29%	28%	20%
Bus service	7%	8%	5%	27%	4%	3%	3%	9%	3%	4%	4%	5%	14%
Organised coach trip	6%	8%	4%	-	8%	2%	6%	8%	14%	8%	4%	7%	3%
Walked from accommodation / home	5%	6%	4%	25%	-	7%	3%	6%	4%	1%	2%	2%	13%
Coach service	2%	2%	1%	1%	2%	1%	-	2%	3%	1%	2%	2%	1%
Bicycle	1%	1%	-	4%	-	1%	3%	1%	-	1%	-	1%	1%
Other	1%	1%	0%	3%	-	1%	3%	1%	-	1%	0%	0%	2%

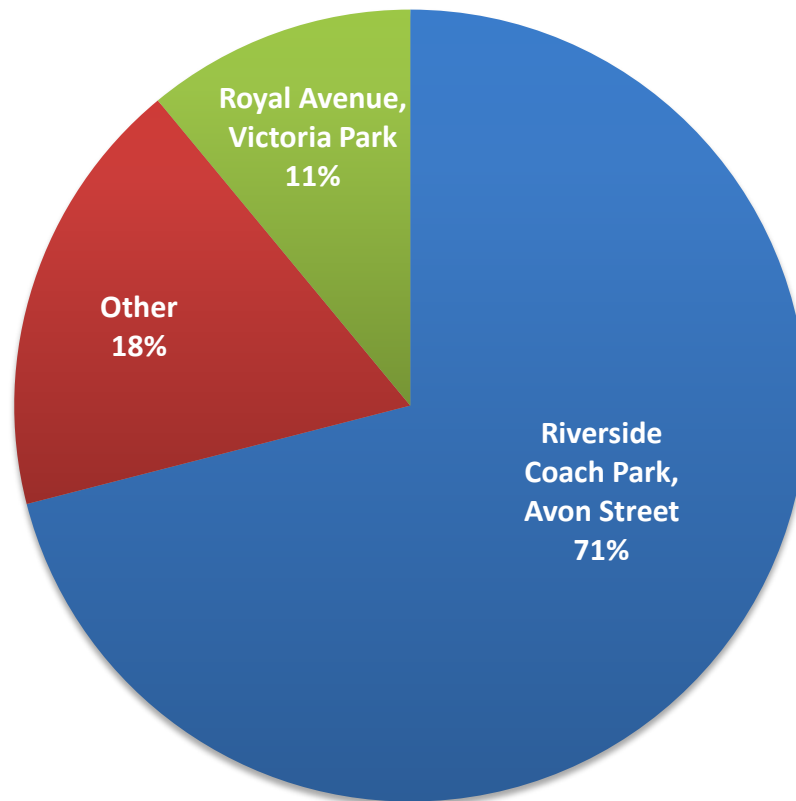
Increased park and ride usage in 2019.

- 42% of respondents who had arrived in the city by car/van etc. had used the city's park & ride facility (27% in 2018) whilst 41% had used a city centre car park (same proportion as 2018).
- 53% of day visitors had used the park and ride facility.



Car/van users etc. Which of the following was used....	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Park & Ride	42%	44%	40%	33%	53%	12%	44%	44%	39%	46%	42%	43%	34%
City centre car park	41%	37%	45%	53%	39%	40%	39%	36%	26%	36%	43%	39%	49%
Neither/ unsure	17%	19%	15%	13%	8%	48%	17%	20%	34%	18%	15%	18%	16%

Around three quarters of organised coach visitors were dropped off at the Riverside Coach Park on Avon Street.



Visitors who arrived at the market as part of an organised coach trip were asked to specify where their coach driver had dropped them off.

71% said they were dropped off at the Riverside Coach Park on Avon Street and a further 11% at Royal Avenue, Victoria Park.

18% (7 respondents) said they were dropped off at another location including; approximately 2 minutes from the Abbey, by Hay Hill, Green Park, Lansdowne Road and The Crescent. Two of the respondents did not know where the location was.

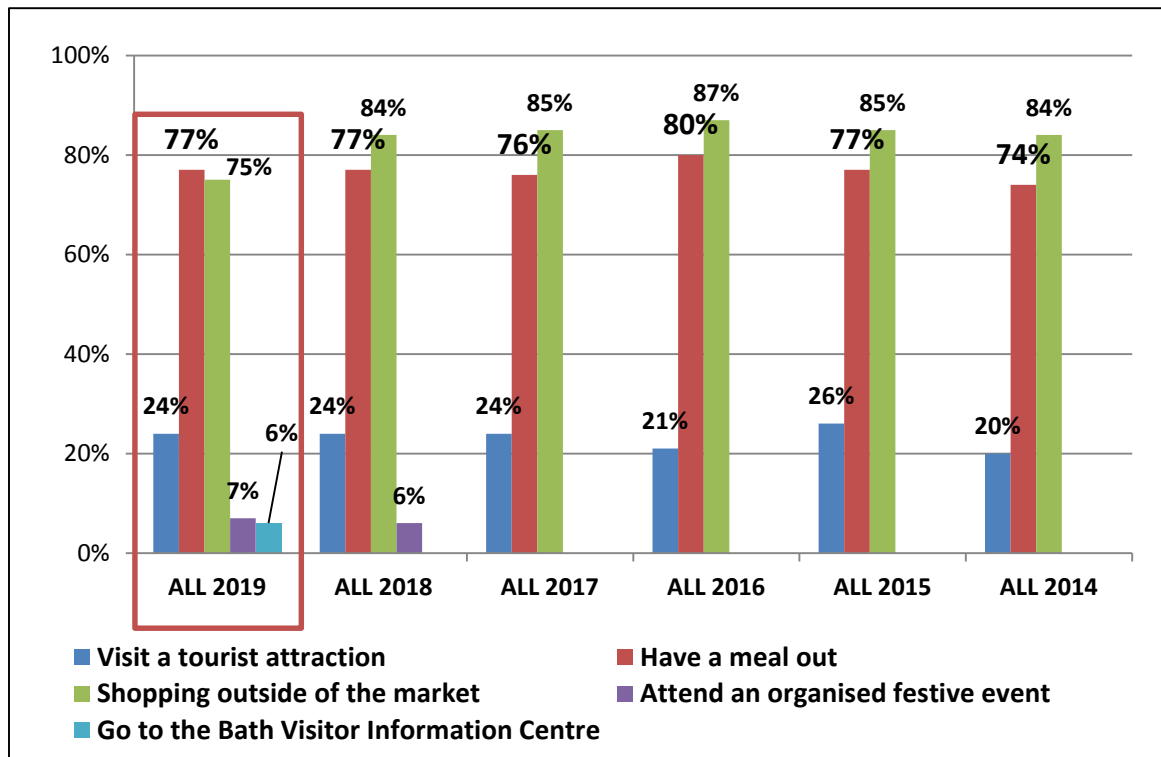
Bath Christmas Market Survey 2019



Activity Participation



Businesses outside of the market continue to benefit from its' visitors.

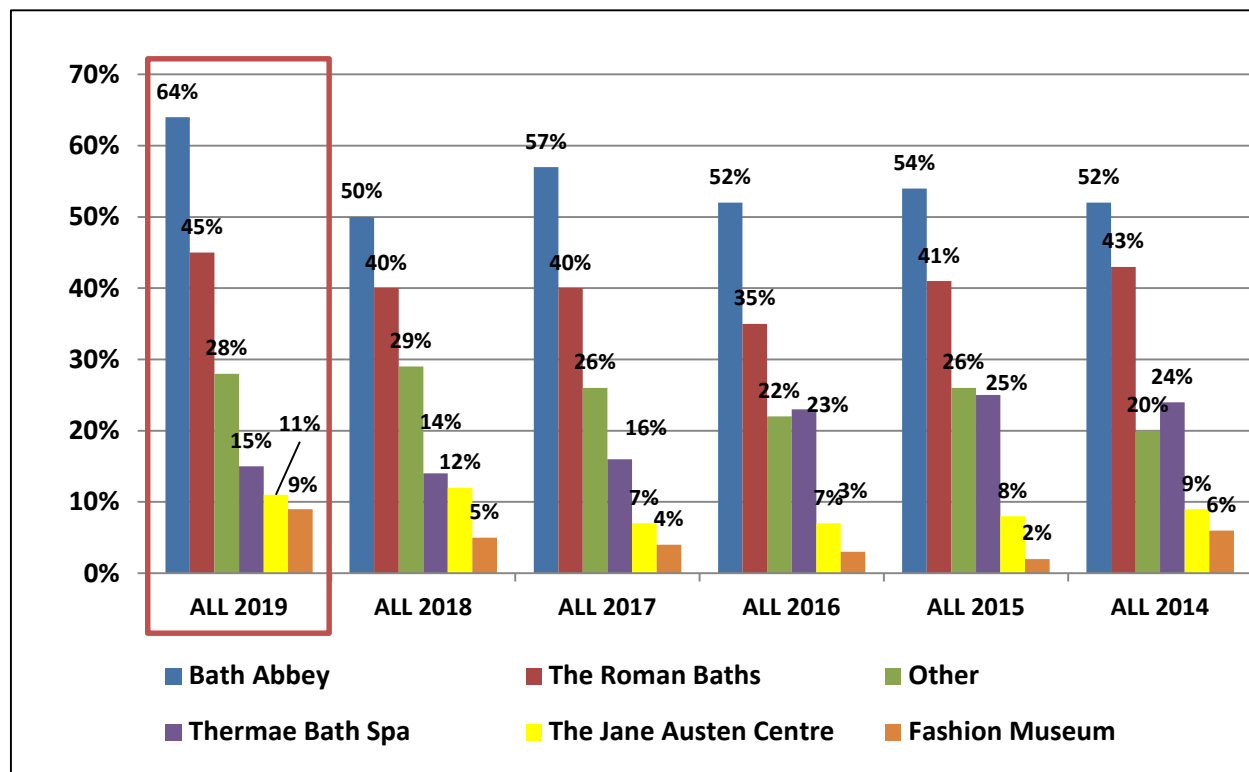


- 77% of respondents indicated that they had/or were planning to have a meal out (same proportion as 2018) whilst 75% had/or planned to do other shopping in Bath outside of the market (84% in 2018). 24% had/or were planning to visit a tourist attraction in the city (the same proportion as 2018).
- 7% had/or planned to attend an organised festive event in the city (6% 2018) including a carol/service in the Abbey, going to the theatre, ice skating and glow in the dark crazy golf and 6% had or were planning to go to Bath Visitor Information Centre (asked about for the first time during the 2019 survey).
- The results by segment are shown below.

Whether likely to do any of the following during visit....	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Have a meal out	77%	77%	76%	45%	75%	91%	56%	79%	88%	79%	78%	78%	73%
Shopping outside of the market	75%	71%	79%	73%	75%	75%	78%	70%	64%	73%	79%	74%	78%
Visit a tourist attraction	24%	26%	22%	2%	17%	50%	19%	26%	55%	34%	16%	22%	30%
Attend an organised festive event	7%	6%	7%	8%	6%	7%	4%	7%	3%	10%	6%	5%	13%
Go to the Bath Visitor Information Centre	6%	5%	8%	3%	4%	13%	7%	4%	15%	4%	6%	6%	7%

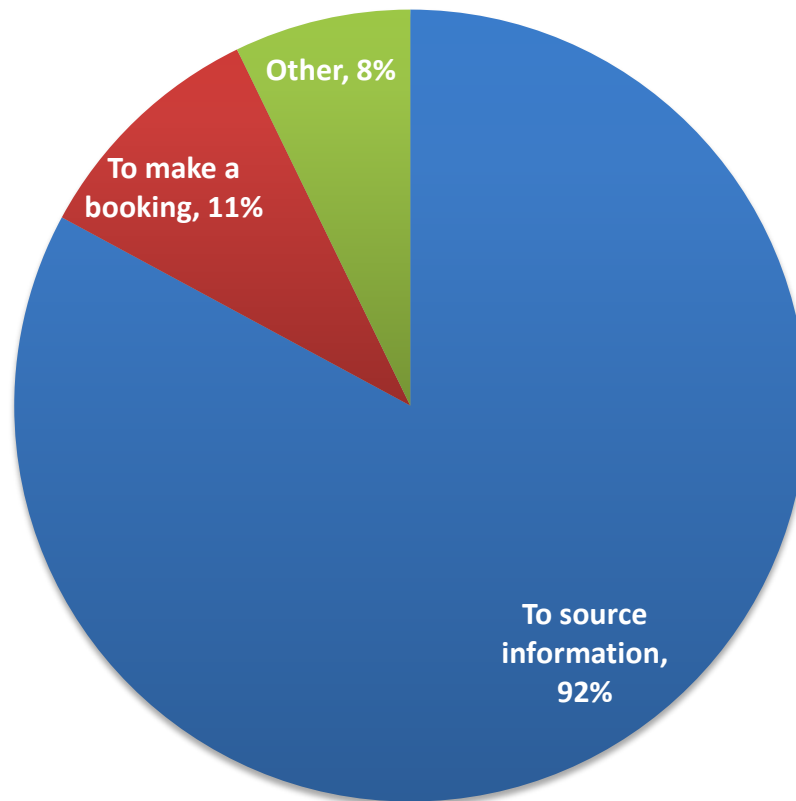
64% of all respondents visiting an attraction during their trip to Bath had or intended to visit Bath Abbey.

- The largest proportion of visitors who indicated that they had/or were planning to visit an attraction in the city cited Bath Abbey (64%, compared with 50% during 2018) and 45% said the Roman Baths (40% 2018). 15% had/or planned to visit Thermae Bath Spa (14% in 2018), 11% The Jane Austen Centre (12% in 2018) and 9% The Fashion Museum (5% in 2018).
- 28% had or planned to visit an 'other' attraction including the Pump Rooms, The Crescent and the Holburne. The full list of these can be found in the appendix which accompanies this report.
- With the exception of local residents there was little variation in the results according to analysis segment.



Attractions visited	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Bath Abbey	64%	64%	63%	100%	68%	60%	50%	65%	65%	59%	67%	59%	76%
The Roman Baths	45%	48%	42%	100%	26%	59%	75%	46%	69%	41%	25%	42%	53%
Other	28%	24%	34%	-	26%	31%	-	26%	23%	27%	35%	28%	32%
Thermae Bath Spa	15%	13%	17%	100%	8%	19%	25%	12%	19%	10%	14%	13%	21%
The Jane Austen Centre	11%	9%	12%	-	6%	14%	-	10%	10%	6%	16%	8%	16%
Fashion Museum	9%	8%	11%	100%	3%	13%	-	9%	8%	10%	8%	5%	21%

92% of visitors who had/or were intending to go to Bath Visitor Information Centre were doing so to source information.

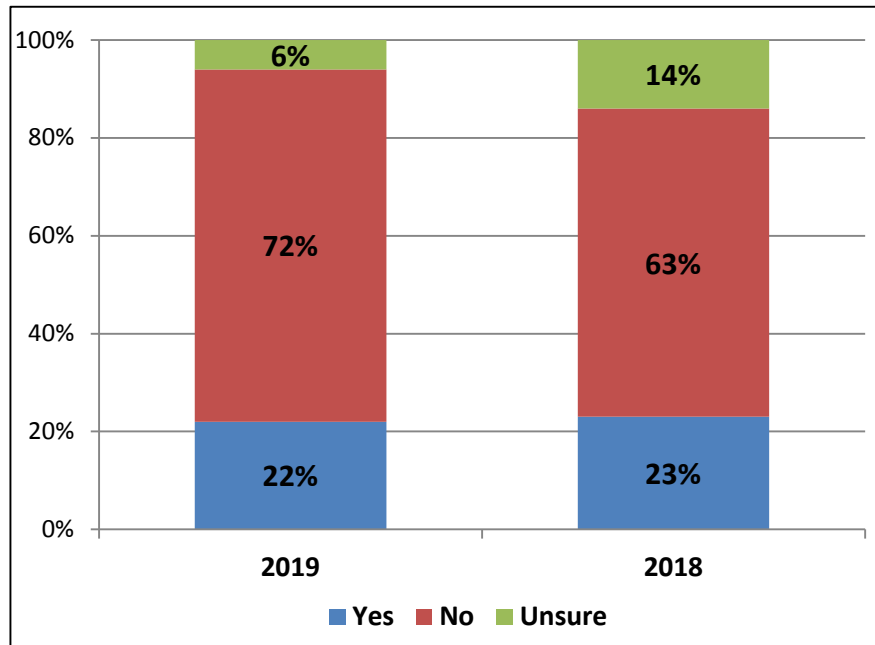


Visitors who had/or were intending to go to Bath Visitor Information Centre (6% of all visitors) were asked what they had/or were intending to go there for.

92% said it was to source information and a further 11% to make a booking.

8% (3 respondents) said they had/intended to go there for another reason including; to get some souvenirs, to look at the shop and to get a map of the market and to enquire if there were any more stalls that they had missed.

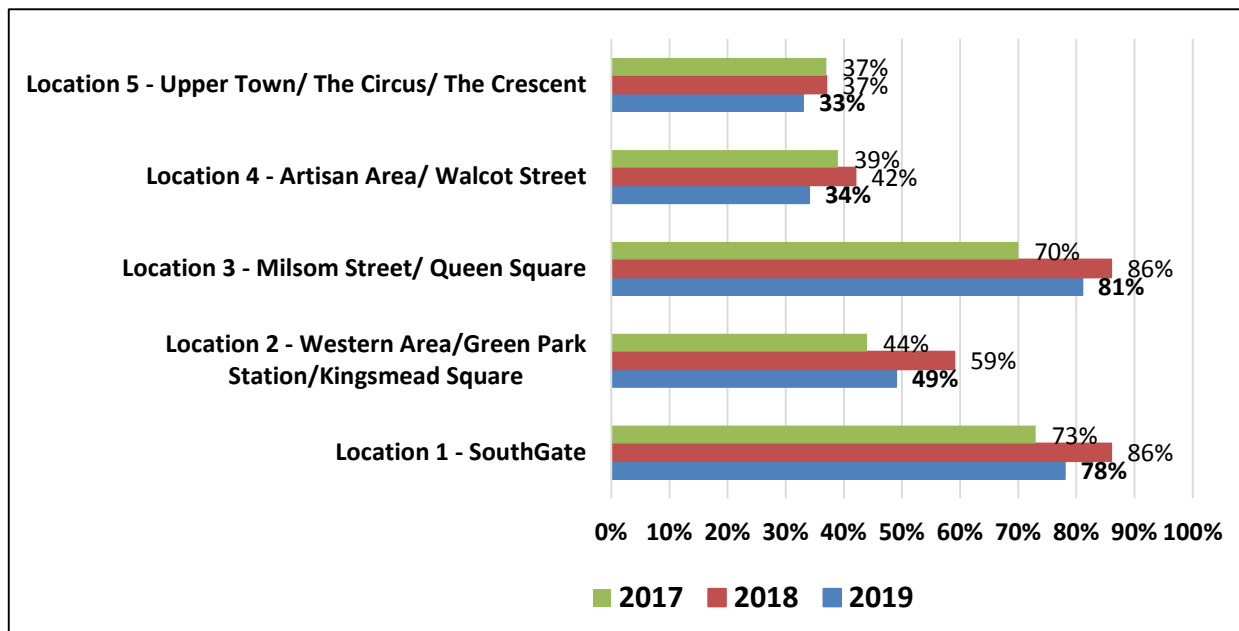
22% of respondents said the increased number of organised festive events on offer in Bath during the 2019 market had impacted on how long they spent in the city during their visit.



- Respondents were asked whether the increased number of organised festive events on offer in Bath during the 2019 market had an impact on how long you they spent in the city during their visit (asked for the first time during 2018).
- 22% said it had impacted on how long they had spent in the city (23% 2018) including 33% of local residents, whilst 72% said it hadn't – an increase of 9% compared with last year and this could have impacted on the slightly lower dwell time at the market compared with 2018 and 2017.

Has the increased number of organised festive events on offer in Bath in 2018 had an impact on how long you will spend in the city during THIS VISIT?	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	22%	13%	29%	33%	24%	17%	-	13%	-	23%	22%	27%	14%
No	72%	87%	62%	67%	71%	75%	-	87%	100%	62%	78%	64%	86%
Unsure	6%	-	10%	-	5%	8%	-	-	-	15%	-	9%	-

SouthGate and Milsom Street/Queen Square were the most popular areas of Bath visited (excluding the central area where the market took place).



- Survey respondents were shown a map of Bath and asked which areas of the city they had visited during their trip.
- Excluding the central area where the main market took place the most visited areas were Milsom Street/Queen Square (81%) and SouthGate (78%) compared with 86% in each case during 2018.
- The results by analysis segment are shown in the table below and are broadly similar.

Areas of Bath visited	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Location 1 – SouthGate	78%	75%	81%	75%	78%	80%	81%	75%	73%	75%	81%	79%	75%
Location 2 - Western Area/ Green Park Station/ Kingsmead Square	49%	44%	55%	38%	48%	58%	63%	42%	48%	56%	49%	52%	37%
Location 3 - Milsom Street/ Queen Square	81%	78%	85%	71%	81%	86%	78%	78%	69%	84%	85%	80%	88%
Location 4 - Artisan Area/ Walcot Street	34%	28%	41%	23%	31%	46%	13%	29%	49%	38%	31%	33%	40%
Location 5 - Upper Town/ The Circus/ The Crescent	33%	29%	37%	14%	31%	47%	22%	29%	40%	45%	29%	32%	36%

Bath Christmas Market Survey 2019



Advertising & Marketing



Over half of all visitors were prompted to visit the 2019 market as the result of a previous visit. A quarter had been recommended to visit it.

- 54% of visitors were prompted to visit the market from a previous visit (52% in 2018), whilst a further 25% had been recommended to visit it (24% in 2018). The value of word of mouth advertising cannot be underestimated as customers who recommend a product/event/location to others help to drive business growth as the company/product/event/location will not need to undertake costly ad campaigns or sales promotions to retain their business.
- 13% were prompted to visit via the internet, (14% 2018), a further 7% via an E-newsletter (same proportion as 2018) and 4% via a social media site such as Facebook or Twitter etc. (a decrease of 3% compared with 2018 - 7%).
- 6% of visitors mentioned another way in which they had been prompted to visit and for a full list of these responses please see the appendices which accompany this report. A breakdown of the 2019 results by analysis segment is shown in the table overleaf.

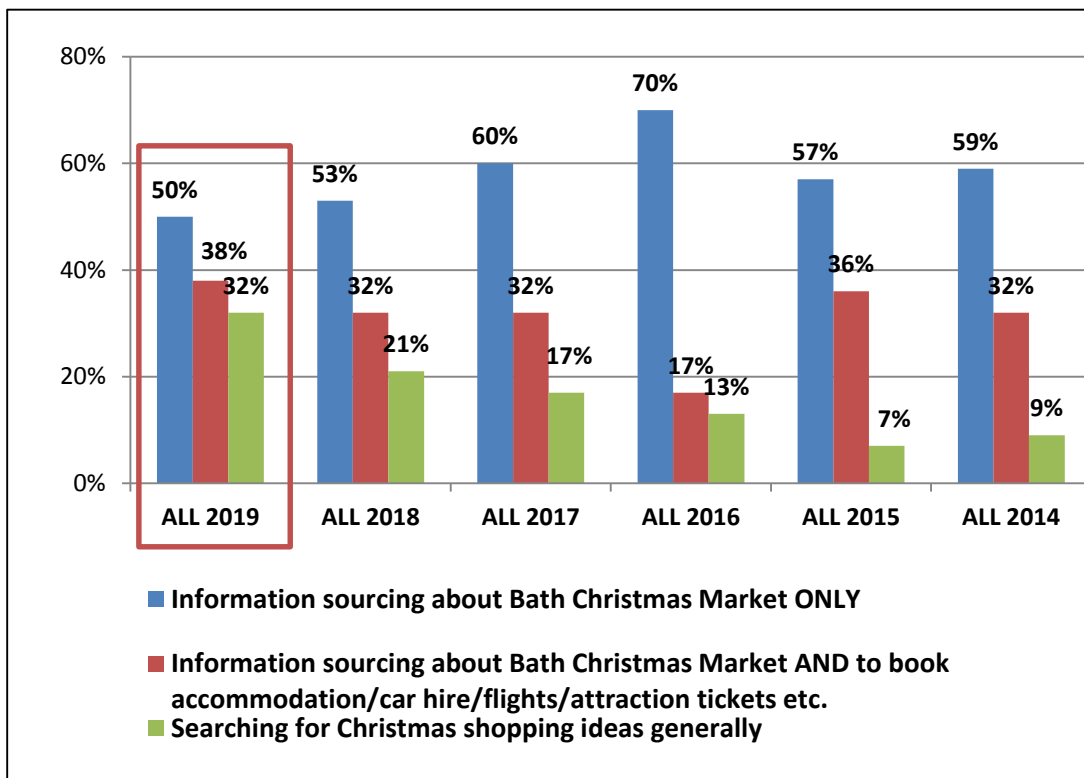
What prompted you to visit Bath Christmas Market?	ALL 2019	ALL 2018	ALL 2017	ALL 2016	ALL 2015	ALL 2014
Previous visit	54%	52%	46%	49%	52%	48%
Recommendation	25%	24%	21%	19%	22%	26%
Internet	13%	14%	12%	14%	20%	23%
E-Newsletter	7%	7%	11%	3%	3%	5%
Other	6%	12%	16%	13%	12%	10%
Social media e.g. Facebook/Twitter etc.	4%	7%	11%	12%	7%	11%
Online advertising	3%	2%	3%	4%	n/a	n/a
Residents invite	3%	2%	2%	n/a	n/a	n/a
Can't recall	3%	-	2%	3%	2%	3%
Coach operator	3%	2%	2%	2%	3%	2%
Magazine/brochure	2%	2%	1%	1%	1%	5%
Local paper	2%	1%	1%	1%	1%	2%
Radio promotion – Heart FM	-	1%	-	-	-	1%
Poster	1%	-	-	-	-	1%

51% of all first time visitors to the market were prompted to visit the market as the result of a recommendation.

- With the exception of first time visitors to the city and first time visitors to the Christmas market, the largest proportion of respondents across all analysis segments had been prompted to visit the market in 2019 as the result of a previous visit.
- 45% of first time visitors to Bath and 51% of first time visitors to the market had been prompted to visit as the result of a recommendation and 29% of first time visitors to Bath and 23% of first time visitors to the market had been prompted to visit as the result of the internet.

What prompted you to visit Bath Christmas Market?	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Previous visit	54%	48%	60%	65%	57%	39%	59%	47%	3%	7%	84%	55%	49%
Recommendation	25%	34%	13%	15%	24%	30%	16%	35%	45%	51%	11%	26%	20%
Internet	13%	15%	10%	7%	12%	19%	19%	15%	29%	23%	6%	13%	13%
E-Newsletter from Bath Christmas Market	7%	-	17%	2%	7%	10%	-	-	3%	9%	8%	7%	6%
Other	6%	11%	-	6%	7%	5%	13%	11%	9%	8%	5%	5%	10%
Social media e.g. Facebook/Twitter/Instagram etc.	4%	4%	4%	1%	4%	4%	-	4%	9%	9%	1%	4%	1%
Online advertising	3%	2%	4%	1%	2%	6%	-	2%	8%	6%	1%	3%	1%
Residents invite	3%	3%	3%	4%	3%	4%	6%	3%	6%	4%	2%	1%	8%
Can't recall	3%	4%	3%	7%	3%	2%	6%	4%	6%	3%	2%	2%	8%
Coach operator	3%	3%	2%	1%	4%	-	-	3%	3%	5%	2%	3%	2%
Magazine/brochure/flyer	2%	2%	1%	5%	0%	4%	3%	2%	1%	4%	0%	2%	1%
Local paper	2%	3%	1%	8%	1%	-	3%	3%	2%	1%	1%	1%	4%
Radio or podcast promotion	-	1%	-	2%	-	1%	3%	1%	-	-	-	-	1%
Poster	1%	1%	-	1%	-	1%	-	1%	1%	1%	-	1%	1%

The primary usage of the internet was information sourcing.

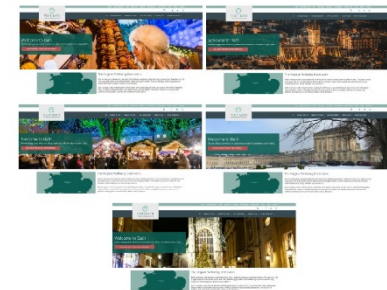


- Half of all visitors who had been prompted to visit the market via the internet had used it to search for information about Bath Christmas Market only – a 3% decrease compared with 2018 and a further decrease compared with 2017 and 2016 (60% and 70% respectively). 38% had used it to source information and to book their accommodation etc. online a 6% increase compared with 2018 (32%).
- 32% had used the internet to search for Christmas shopping ideas generally, an 11% increase compared with 2018 (21%).
- Staying visitors who were prompted to visit the market via the internet were the most likely to be using it to source information and to book their accommodation etc. (81%), along with first time visitors to the city and those visiting for an other reason (56% in each case).

What did you use the internet for?	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Information sourcing about Bath Christmas Market ONLY	50%	59%	31%	67%	67%	19%	60%	59%	44%	50%	52%	54%	33%
Information sourcing about Bath Christmas Market AND to book accommodation/car hire/flights/attraction tickets etc.	38%	34%	45%	-	16%	81%	40%	33%	56%	31%	38%	33%	56%
Searching for Christmas shopping ideas generally	32%	29%	38%	67%	29%	29%	20%	30%	32%	28%	29%	33%	28%

Awareness of the www.bathchristmasmarket.co.uk website decreased during 2019 but remained higher than during 2017.

- Those visitors who indicated that they had been prompted to visit the Christmas market via the internet (13%) were shown visual prompts of the www.bathchristmasmarket.co.uk, www.visitbath.co.uk/christmas and www.visitbath.co.uk website homepages (all three images are shown below) and asked if they recognised them.
- Overall awareness was highest for the www.bathchristmasmarket.co.uk website homepage with 65% recognising it, a decrease compared with 2018 (73%) but remaining higher than during the 2017 survey (56%). This was followed by 61% who recognised the www.visitbath.co.uk/christmas website (59% 2018, 47% 2017, 39% 2016, 44% 2015 & 29% 2014) and 30% who recognised the www.visitbath.co.uk website – a significant decrease compared with 2018 (52%) and previous years (53% 2017, 47% 2016, 44% 2015 and 29% 2014).
- A further breakdown of the 2019 results by analysis segment is shown overleaf.



www.bathchristmasmarket.co.uk

65% visitor recall

(73% 2018 / 56% 2017 / 85% 2016 /
69% 2015 / 75% 2014)

www.visitbath.co.uk/christmas

61% visitor recall

(59% 2018 / 47% 2017 / 39% 2016 /
44% 2015 / 29% 2014)

www.visitbath.co.uk

30% visitor recall

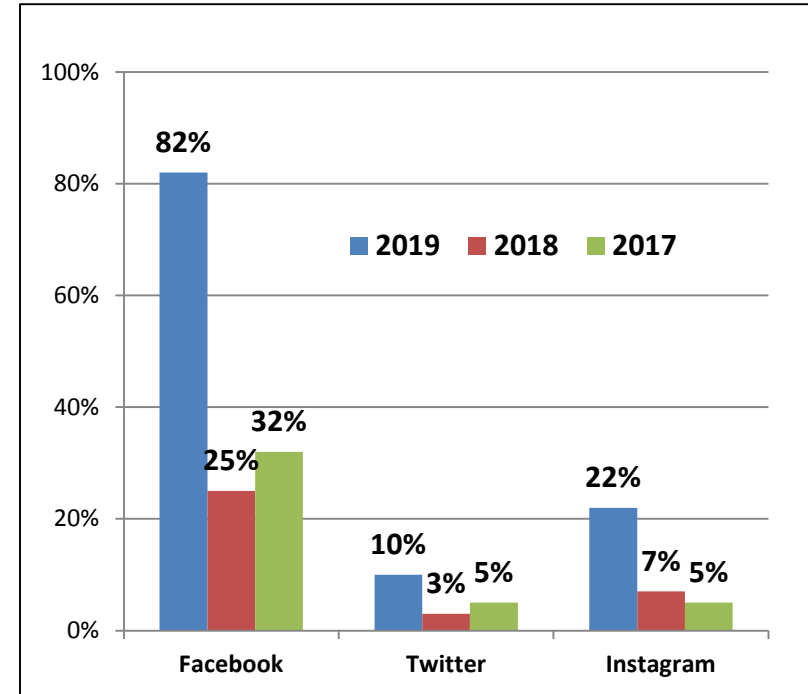
(52% 2018 / 53% 2017 / 47% 2016 /
44% 2015 / 29% 2014)

Recognition levels of the website homepages varied considerably amongst the analysis segments and is likely to be impacted by sample sizes.

www.bathchristmasmarket.co.uk website												
	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	60%	76%	67%	55%	81%	33%	63%	69%	64%	62%	67%	58%
No	35%	7%	-	35%	16%	67%	31%	27%	25%	33%	23%	37%
Unsure	5%	17%	33%	10%	3%	-	6%	4%	11%	5%	10%	5%
www.visitbath.co.uk/christmas website												
	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	51%	83%	33%	65%	59%	33%	53%	69%	59%	62%	63%	53%
No	41%	7%	17%	29%	34%	67%	38%	23%	38%	29%	30%	32%
Unsure	8%	10%	50%	6%	6%	-	9%	8%	3%	10%	7%	16%
www.visitbath.co.uk website												
	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	31%	28%	67%	15%	47%	17%	33%	38%	16%	33%	31%	26%
No	59%	38%	17%	60%	47%	83%	56%	38%	65%	57%	55%	42%
Unsure	10%	34%	17%	25%	6%	-	11%	23%	19%	10%	14%	32%

Increased social media presence on all platforms but especially Facebook.

- Respondents were asked whether they were following the Bath Christmas Market on social media sites Facebook, Twitter and Instagram.
- 82% said they had been following the market on Facebook, a significant increase compared with 25% doing so in 2018 and 32% in 2017. 22% were doing the same on Instagram, again a significant increase compared with 7% and 5% during 2018 and 2017 respectively. 10% were following the market on Twitter compared with 3% during 2018 and 5% during 2017.
- 100% of adults with children followed the market on Facebook, along with 87% of day visitors, 87% on a repeat visit to the market and 85% who said it was their main reason for visiting Bath. 19% of visitors who had an other reason for visiting and 15% of first time visitors to Bath were doing so on Twitter. 37% of first time visitors to Bath and 32% of local residents were following the market on Instagram.



Whether following Bath Christmas Market on any of the following social media sites....	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Facebook	82%	83%	81%	58%	87%	78%	100%	81%	78%	80%	87%	85%	70%
Twitter	10%	8%	11%	11%	9%	12%	-	8%	15%	5%	11%	8%	19%
Instagram	22%	17%	24%	32%	19%	25%	-	19%	37%	18%	18%	21%	23%

Awareness levels of the Bath Christmas Market advert and guide both decreased during 2019.

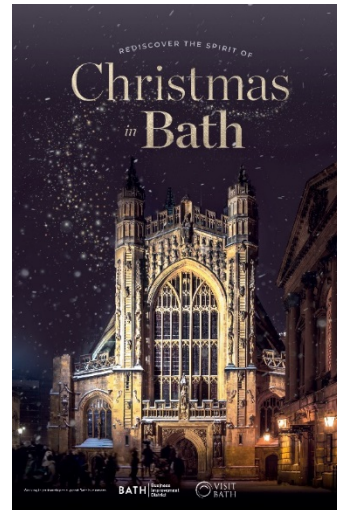
- Respondents were also shown visual prompts of the full page press advert, BID advert and guide used to promote the 2019 market (images of which are shown below) and asked if they recognised them.
- Overall awareness was highest for the Bath Christmas Market advert with 44% recognising it, although a decrease compared with 2018 (51%). This was followed by 35% who recognised the market guide, but again a decrease compared with last year (50%) although higher than during 2017 (24%). 24% recalled the Christmas in Bath advert produced by the BID.
- A further breakdown of the 2019 results by analysis segment is shown overleaf.



Bath Christmas Market Advert

44% visitor recall

(51% 2018 / 50% 2017 / 50% 2016 / 15% 2015 / 37% 2014)



Christmas in Bath Advert (BID)

24% visitor recall

(asked about for the first time during 2019 survey)



Bath Christmas Market Guide

35% visitor recall

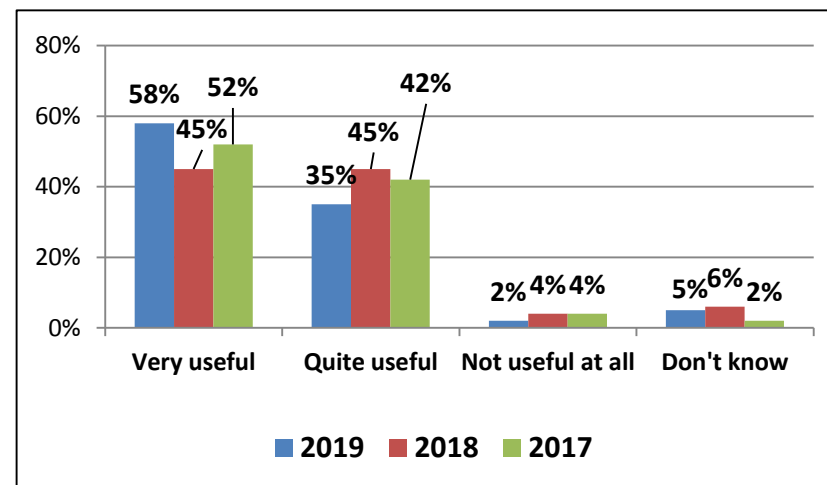
(50% 2018 / 24% 2017 / 55% 2016)

Recognition levels of the adverts and guide were relatively consistent amongst the analysis segments.

Bath Christmas Market advert												
	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	26%	64%	40%	41%	53%	31%	25%	37%	40%	48%	45%	40%
No	69%	22%	49%	50%	38%	59%	70%	56%	51%	43%	47%	48%
Unsure	5%	14%	11%	9%	9%	9%	5%	8%	9%	9%	9%	12%
Christmas in Bath advert (BID)												
	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	24%	24%	28%	22%	27%	22%	24%	22%	23%	23%	23%	27%
No	70%	58%	60%	68%	59%	66%	70%	71%	65%	64%	66%	61%
Unsure	6%	18%	12%	11%	15%	13%	6%	8%	12%	13%	12%	12%
Guide												
	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	34%	36%	31%	32%	46%	27%	35%	45%	39%	32%	36%	31%
No	64%	51%	63%	61%	48%	64%	64%	49%	52%	62%	56%	66%
Unsure	2%	13%	6%	7%	7%	9%	1%	6%	9%	7%	8%	3%

Highest rating so far for the market guide.

- Those respondents who recognised the front cover of the 2019 guide (35% of all respondents) were also asked if they had a copy of it. 64% indicated that they did have a copy of the guide (60% 2018 and 52% 2017).
- 58% found the guide very useful (45% 2018 and 52% 2017). A further 35% (45% and 42% in 2018 and 2017 respectively) found the guide quite useful. Only 2% (4% in each case during 2018 and 2017) said the guide had not been at all useful.
- The results by analysis segment are shown below.

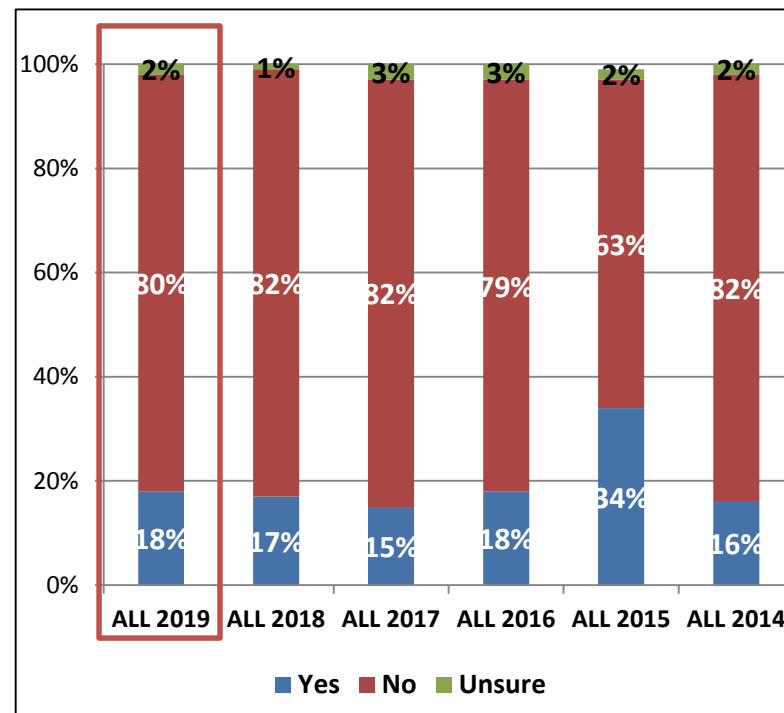


Guide	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Very useful	63%	51%	29%	62%	57%	80%	62%	71%	58%	58%	59%	48%
Quite useful	29%	41%	71%	30%	33%	20%	30%	25%	31%	34%	32%	52%
Not useful at all	-	5%	-	1%	5%	-	-	4%	2%	3%	3%	-
Don't know	8%	3%	-	7%	5%	-	8%	-	10%	6%	6%	-

- For the second time during the 2019 survey respondents were asked whether they had / or would be going to any other festive events in Bath as a result of seeing them advertised in this guide. 14% of respondents said they had or would be doing so, a decrease of 5% compared with last year when this question was asked for the first time (19%).

Marketing/promotion continues to influence good levels of visits.

- Respondents were asked whether they had made their decision to visit Bath Christmas Market after seeing the marketing/promotional materials for it.
- 18% said they had been influenced to visit by the marketing/promotional materials they had seen. This was an increase of 1% point compared with 2018 (17%) and compared with 15% during 2017, 18% during 2016, 34% during the 2015 survey and 16% during the 2014 survey. Considering the large proportion of respondents visiting because of a previous visit or as the result of a recommendation, both of which are unlikely to be influenced by any marketing/promotional materials, this is a relatively good proportion of visitors being influenced.
- Looking at analysis segments, F2F survey respondents, staying visitors, adults with children, first time visitors to Bath, first time visitors to the market and those for whom the market was their main reason for visiting were the most likely to have made their decision to visit the Christmas market after seeing some form of marketing/ promotional materials for it.



Whether made the decision to visit Bath Christmas Market after seeing the marketing/promotional materials for it	ALL 2019	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BATH	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	18%	20%	17%	12%	17%	25%	22%	19%	42%	29%	9%	20%	11%
No	80%	80%	79%	88%	82%	71%	78%	81%	56%	68%	89%	78%	88%
Don't know	2%	-	4%	-	2%	3%	-	-	2%	2%	2%	2%	1%

Bath Christmas Market Survey 2019



Visitor Expenditure



Average visitor spending at the market decreased during 2019 to £23.77.

- Average visitor spend per person per day at the Bath Christmas Market 2019 was £23.77, compared with £26.84 in 2018, £37.54 in 2017, £23.31 in 2016, £31.75 in 2015 and £25.92 in 2014.
- In addition, visitors spent an average of £21.42 on shopping elsewhere in the city, £16.79 on eating and drinking, £1.61 on entertainment and £0.96 on travel and transport, all decreases compared with previous years with the exception of shopping elsewhere in Bath.
- Staying visitors spent an average of £69.17 per person per night on accommodation in Bath, the highest level to date.

VISITOR SPEND BY CATEGORY 2014-2019
(£/per person/per day) F2F SURVEY ONLY

	All spend at Bath Christmas Market	Shopping elsewhere in Bath	Eating & drinking elsewhere in Bath	Attractions/ Entertainment	Travel & transport in Bath	Accommodation in Bath (STAYING VISITORS ONLY)
ALL 2019	£23.77	£21.42	£16.79	£1.61	£0.96	£69.17
LOCAL	£13.70	£19.05	£7.00	£0.00	£0.23	
DAY	£24.53	£19.64	£13.68	£1.04	£0.80	
STAYING	£28.07	£29.78	£35.01	£4.79	£2.19	
ALL 2018	£26.84	£18.37	£16.98	£2.04	£1.95	£51.65
ALL 2017	£37.54	£41.54	£22.09	£2.83	£0.96	£50.51
ALL 2016	£23.44	£22.07	£16.14	£1.96	£3.48	£45.91
ALL 2015	£31.75	£30.54	£19.51	£1.83	£1.33	£42.71
ALL 2014	£25.92	£29.84	£14.69	£1.89	£3.47	£31.79

Retail sales fell for the first time in 25 years last year, according to the leading UK retail industry body reporting in January 2020.

The British Retail Consortium (BRC) said total sales fell 0.1%, marking the first annual sales decline since 1995.

Sales in November and December were particularly weak, falling 0.9%, the BRC said.

Helen Dickinson, chief executive of the BRC, said: "Twice the UK faced the prospect of a no-deal Brexit, as well as political instability that concluded in a December general election - further weakening demand for the festive period. Retailers also faced challenges as consumers became both more cautious and more conscientious as they went about their Christmas shopping," she added.

Bath Christmas Market Survey 2019



Visitors' Opinions, Likes & Dislikes



Introduction

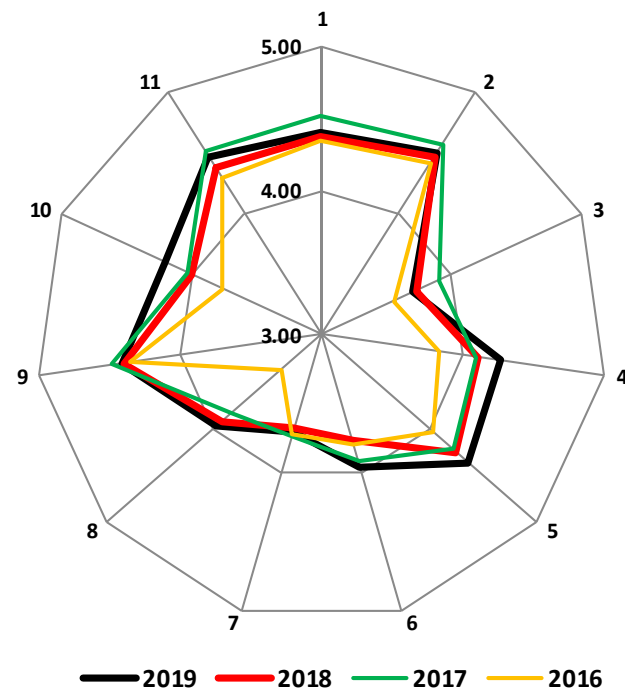
The 2019 Bath Christmas Market Survey once again obtained visitors' satisfaction levels with a wide range of factors or indicators which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of one to five where '1' = 'very poor' (or the most negative response), '2' = 'poor', '3' = 'neutral', '4' = 'good' and '5' = 'very good' (or the most positive response), allowing a satisfaction 'score' (out of a maximum of five) to be calculated.

The areas explored in terms of satisfaction were:

- ✓ Range of stalls
- ✓ Quality of stalls
- ✓ Number of new traders (if been to market before)
- ✓ Range of catering facilities
- ✓ Quality of catering facilities
- ✓ Ease of finding your way around/signage
- ✓ Visitor information available on site
- ✓ Ease of getting around the site/accessing the stalls
- ✓ Site decoration, lighting etc.
- ✓ Quality of entertainment
- ✓ Overall atmosphere

With the exception of the number of new traders, visitor satisfaction levels increased slightly during 2019.

Visitor Satisfaction levels 2014 - 2019		2019	2018	2017	2016	2015	2014
1	Range of stalls	4.40	4.38	4.52	4.34	4.40	4.57
2	Quality of stalls	4.50	4.46	4.57	4.41	4.48	4.65
3	Number of new traders (if been before)	3.70	3.73	3.90	3.56	3.60	3.86
4	Range of catering facilities	4.27	4.11	4.09	3.83	3.98	4.10
5	Quality of catering facilities	4.36	4.25	4.22	4.03	4.14	4.28
6	Ease of finding your way around/signage	3.96	3.77	3.92	3.79	3.84	4.21
7	Visitor information available on site	3.71	3.67	3.73	3.72	3.70	3.87
8	Ease of getting around the site/accessing the stalls	3.97	3.93	3.83	3.37	3.59	3.96
9	Site decoration, lighting etc.	4.42	4.40	4.48	4.36	4.36	4.47
10	Quality of entertainment	4.21	4.00	4.03	3.76	3.76	4.03
11	Overall atmosphere	4.46	4.37	4.51	4.29	4.36	4.53



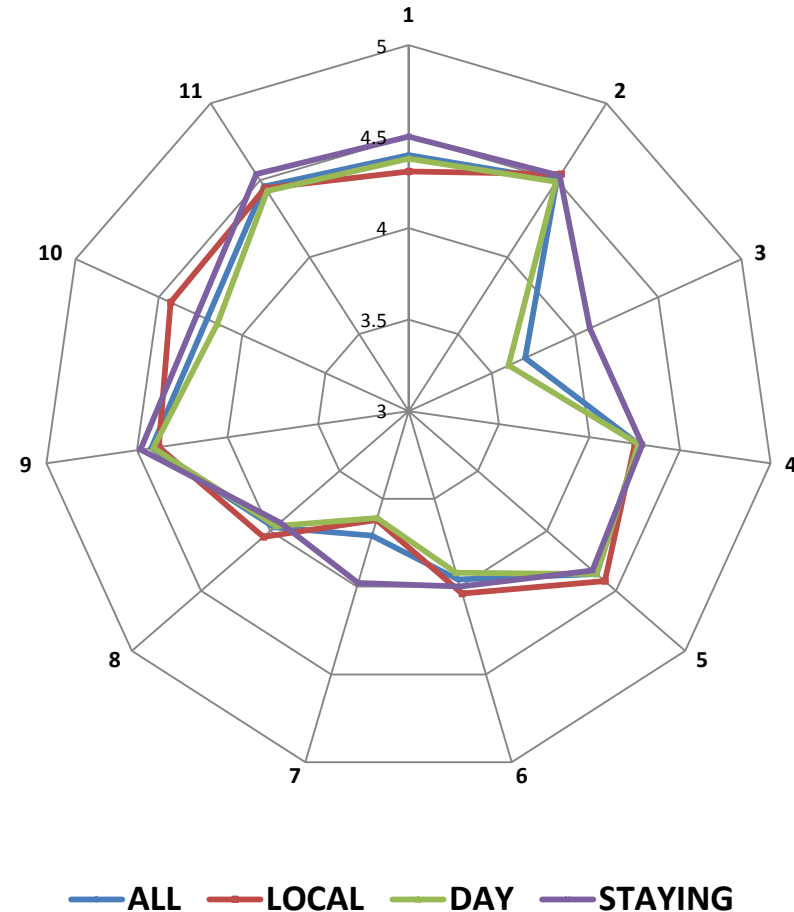
- Visitor satisfaction levels with their whole Bath Christmas Market experience, on the whole, increased across the board compared with the 2018 market. The highest average scores were for the quality of the stalls (4.50), overall atmosphere (4.46), the site decoration, lighting etc. (4.42) along with the range of stalls (4.40) as was also the case during previous years.
- 7 of the 11 indicators explored by the survey received an average score of 4.21 or more.
- Just 4 indicators including the number of new traders (3.70), the visitor information available on site (3.71), the ease of finding your way around/signage (3.96) and the ease of getting around the site/accessing the stalls (3.97) received an average score of less than 4.00.

7 of the 11 indicators received an average score of 4.00 or more

Visitor Satisfaction levels 2019	Mean Score	Very poor	Poor	Average	Good	Very good	Don't know
Quality of stalls	4.50	1%	2%	7%	28%	62%	1%
Overall atmosphere	4.46	1%	4%	8%	23%	63%	2%
Site decoration, lighting etc.	4.42	1%	2%	9%	31%	56%	1%
Range of stalls	4.40	1%	2%	10%	29%	57%	-
Quality of catering facilities	4.36	0%	1%	10%	27%	43%	19%
Range of catering facilities	4.27	1%	2%	13%	32%	43%	10%
Quality of entertainment	4.21	1%	3%	11%	27%	37%	21%
Ease of getting around the site/accessing the stalls	3.97	3%	7%	16%	33%	38%	2%
Ease of finding your way around/signage	3.96	1%	10%	17%	33%	35%	3%
Visitor information available on site	3.71	1%	11%	14%	21%	20%	32%
Number of new traders (if been before)	3.70	3%	5%	17%	24%	16%	34%

Satisfaction levels were generally highest amongst staying visitors.

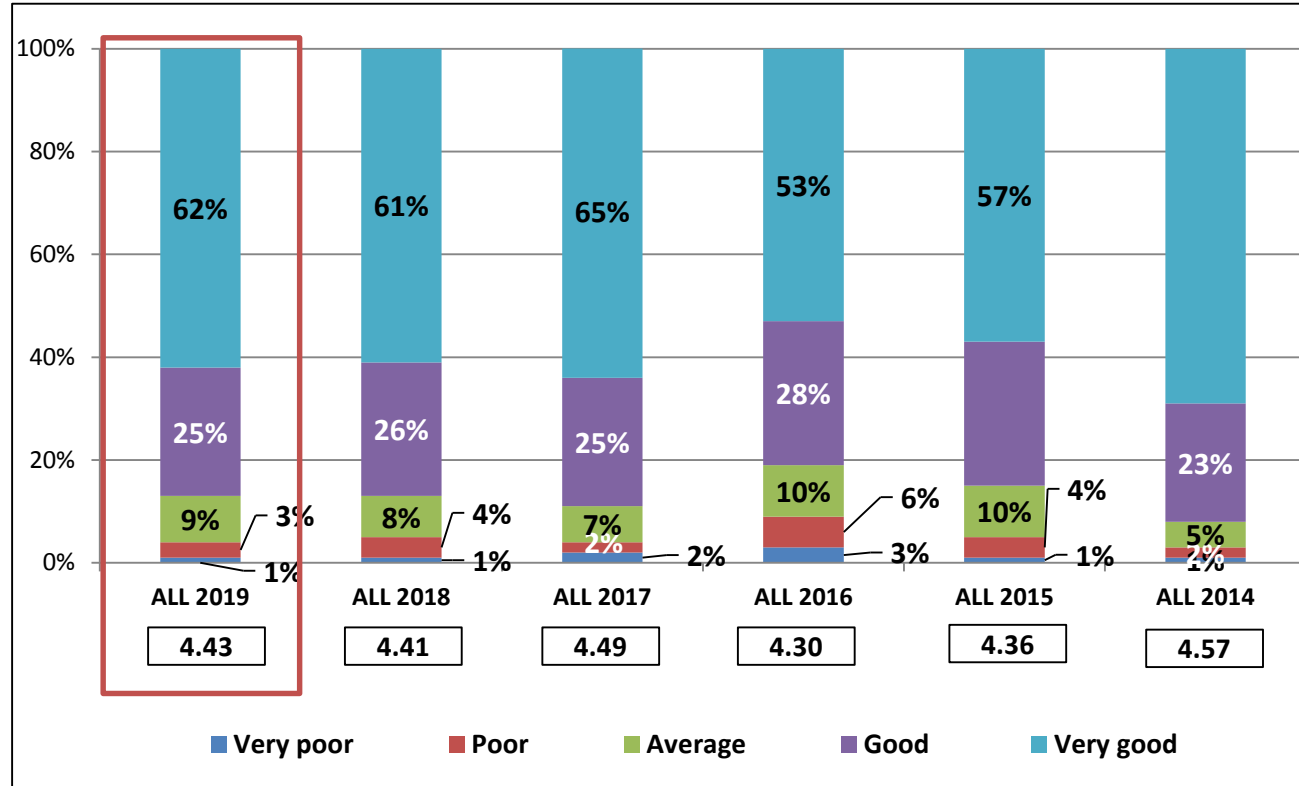
Satisfaction indicator		ALL	LOCAL	DAY	STAYING
1	Range of stalls	4.40	4.31	4.38	4.50
2	Quality of stalls	4.50	4.54	4.49	4.53
3	Number of new traders (if been before)	3.70	-	3.60	4.09
4	Range of catering facilities	4.27	4.25	4.27	4.29
5	Quality of catering facilities	4.36	4.42	4.36	4.33
6	Ease of finding your way around/signage	3.96	4.04	3.92	4.00
7	Visitor information available on site	3.71	3.62	3.61	3.98
8	Ease of getting around the site/accessing the stalls	3.97	4.05	3.96	3.93
9	Site decoration, lighting etc.	4.42	4.38	4.41	4.48
10	Quality of entertainment	4.21	4.43	4.15	4.27
11	Overall atmosphere	4.46	4.45	4.43	4.54



- Visitor satisfaction levels by visitor type are shown in the table and chart above.
- The highest levels of satisfaction were evident amongst staying visitors.

The overall rating of Bath Christmas Market increased slightly in 2019.

- At 4.43 out of 5.00, visitors' overall rating of Bath Christmas Market increased slightly compared to 2018 (4.41) but remained lower than during 2017 (4.49).
- Staying visitors had the highest overall opinion of the market (4.49) and day visitors the lowest (4.41).
- 62% of visitors rated the market overall as 'very good' and a further 25% as 'good' (61% and 26% during 2018 respectively).
- Just 4% of visitors rated the market as 'poor' (3%) or 'very poor' (1%), a 1% decrease compared with 2018.



Overall opinion of Bath Christmas Market	ALL 2019	LOCAL	DAY	STAYING
Satisfaction score	4.43	4.42	4.41	4.49

Likelihood of recommending the Christmas Market & Bath

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

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

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

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

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

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

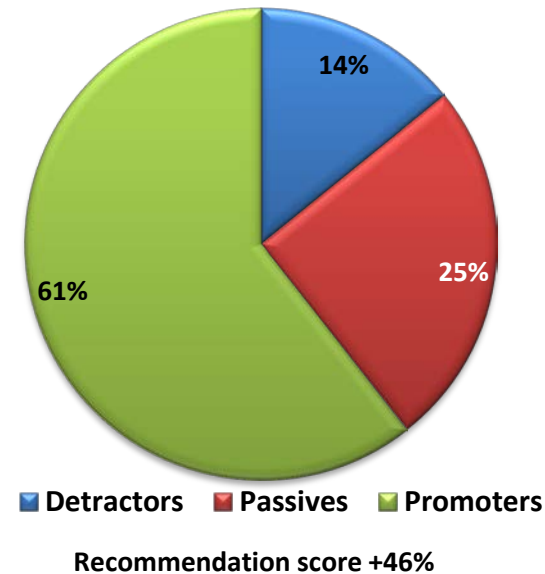
The Recommendation Score is created by calculating what percentage of the customer base are Promoters and then subtracting the percentage who are Detractors.

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

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

The Bath Christmas Market achieved a good recommendation score of +46%.

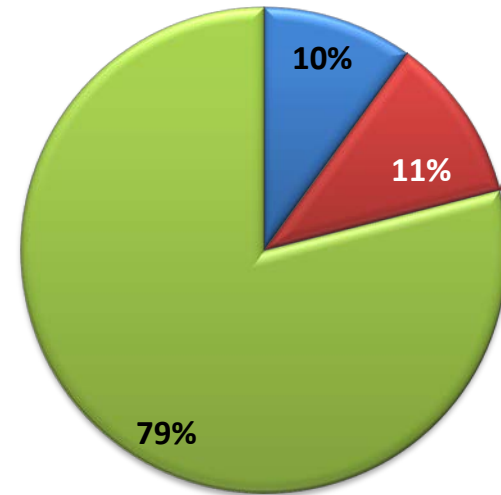
- The 2019 Bath Christmas Market achieved a recommendation score of +46%, a slight decrease of -5% compared with the 2018 market score but it remains higher than the 2016 market score (+33%). At +66% however, the score achieved during the 2014 market remains the highest achieved to date.
- Staying visitors gave the highest recommendation score at +55% and local visitors the lowest (+36%).
- 61% of Christmas Market visitors were categorised as 'Promoters' giving a score of 9 or 10 out of 10 for their likelihood of recommending the market to their friends or family (63% 2018), 25% gave a score of 7 or 8 and were categorised as 'Passives' (24% 2018), whilst 14% gave a score of 0-6 for their likelihood of recommending the market and were therefore categorised as 'Detractors' (13% 2018).



Likelihood of recommending Bath Christmas Market	Recommendation score
ALL 2019	+46%
ALL 2018	+51%
ALL 2017	+53%
ALL 2016	+33%
ALL 2015	+46%
ALL 2014	+66%
LOCAL	+36%
DAY	+45%
STAYING	+55%

Bath achieved a very high recommendation score of +69%.

- On the same scale, visitors were also asked how likely they would be to recommend a visit to Bath to their friends and family.
- Bath achieved a high recommendation score of +69%, compared with +68% in 2018, +69% in 2017, +57% in 2016, +68% in 2015 and +78% in 2014.
- 79% of visitors were categorised as 'Promoters' giving a score of 9 or 10 out of 10 for their likelihood of recommending a visit to the city to their friends or family (74% 2018), 11% gave a score of 7 or 8 and were categorised as 'Passives' (19% 2018), whilst 10% gave a score of 0-6 for their likelihood of recommending Bath and were therefore categorised as 'Detractors' (7% 2018).
- Local residents gave the highest recommendation score at +74% and day visitors the lowest (+67%).



■ Detractors ■ Passives ■ Promoters

Recommendation score +69%

Likelihood of recommending Bath	Recommendation score
ALL 2019	+69%
ALL 2018	+68%
ALL 2017	+69%
ALL 2016	+57%
ALL 2015	+68%
ALL 2014	+78%
LOCAL	+74%
DAY	+67%
STAYING	+72%

Bath Christmas Market Survey 2019



Non-Visitors/Lapsed Visitors



47% of those not visiting the market during 2019 had last visited the event in 2018*.

- 68% of online survey respondents who said they had not visited the market during 2019 had visited the market previously (61% in 2018), 32% had never visited.
- 47% of lapsed visitors had last been to the market in 2018.

Whether ever visited Bath Christmas Market (Online survey respondents only)	2019	2018	2017
Yes	68%	61%	65%
No	32%	37%	33%
Don't know	-	2%	1%

When last visited Bath Christmas Market (lapsed online respondents only)	2019	2018	2017
2018	47%	N/A	N/A
2017	18%	57%	N/A
2016	12%	17%	57%
2015	18%	10%	19%
2014	-	3%	13%
2012	-	3%	4%
2010	-	3%	2%
2009 or earlier	-	-	2%
Don't know/can't remember	6%	7%	4%

* Please interpret the results in this chapter with caution due to the low sample size for non/lapsed visitors of only 25.

Overcrowding and competition from other markets was the main deterrent stopping lapsed visitors from returning to Bath Christmas Market in 2019.

- When asked why they had not visited the market during 2019, 24% said it was too crowded – an increase of 8% compared with 2018. 20% said they went to another Christmas market instead (22% in 2018) and 16% said they would visit again in the future having been before – double the proportion saying this during the 2018 survey (8%). 12% said it was the distance from home/their accommodation (22% 2018).
- 28% (7 online respondents) gave another reason for not visiting in 2019 and the full list of these can be found in the appendix which accompanies this report. Many responses included the accommodation being too expensive.
- 20% (5 online respondents) visited another Christmas market instead of Bath and these are listed in the table opposite.
- 40% (2 online respondents) who visited another Christmas market instead of Bath said they chose the other market in direct preference to Bath (45% in 2018). Reasons for this included the other market having won Best Christmas Market in Europe for three years running and it being much more interesting, less crowded and having better parking.

Why didn't you visit Bath Christmas Market this year? (lapsed online respondents only)	2019	2018	2017
Other	28%	45%	47%
Too crowded	24%	16%	24%
Went to another Christmas Market instead	20%	22%	16%
I will visit again in the future having been before	16%	8%	19%
Distance from home/accommodation	12%	22%	15%
None of these	12%	10%	6%
Lack of money/available finances	8%	10%	4%
Wrong weather to visit	8%	8%	3%
Not interested	8%	2%	6%
Lack of public transport	4%	4%	1%
Lack of own transport	4%	2%	5%
I have been before and once is enough	4%	2%	6%
Children not interested	-	2%	-

Other markets visited? (those who went to another Christmas Market in 2019)
Manchester
Zagreb, Croatia
Budapest, Bratislava, Vienna
Birmingham
Salisbury

Bath Christmas Market Survey 2019

Estimating the Economic Value of the 2019 Market



The 2019 Bath Christmas Market attracted approximately 215,000 unique visitors.

- Overall, approximately 403,000 people are estimated to have attended the Christmas Market in Bath over the 18 day period between Thursday 28th November and Sunday 15th December 2019, a very similar figure to the previous year. This figure is estimated from local data provided for transportation usage in the city alongside Bath seasonality data and survey data.
- Of the total 403,000 people visiting the market over the 18 days approximately 284,000 are estimated to have been unique visitors to the event. When this figure was further analysed by those who said that the market was their *main* reason for visiting Bath, an estimate of approximately 221,000 unique visitors was calculated.
- The unique visitor counts below shows the total number of individuals attending over the market period by visitor type. Whilst total attendance for the market is actually higher than this (403,000) it is assumed that residents visited the market only once during the course of the day but that day and staying visitors may have made more than one visit during their trip. Therefore, an average of 1.5 visits has been assumed for these visitors i.e. for every two people visiting the market one will have visited the market twice during the course of the day and hence why the unique visitors figure is smaller.

Attendee counts by type	All visitors	Average no. visits	All unique visitors	Main reason for visit to Bath	Main reason for visit to Bath Unique visitors
On staying trip (STAYING IN BATH CITY)	97,000	1.5	64,000	76%	49,000
On staying trip (STAYING OUTSIDE BATH CITY)	48,000	1.5	32,000	80%	26,000
On a day trip from home	210,000	1.5	140,000	87%	122,000
A local resident /work in Bath	48,000	1	48,000	50%	24,000
Total 2019	403,000		284,000		221,000
Total 2018	404,000		283,000		215,000
Total 2017	409,000		287,000		215,000
Total 2016	429,000		299,000		218,000
Total 2015	413,000		288,000		205,000
Total 2014	390,000		274,000		202,000

Please note that figures may not sum due to rounding

Estimating the economic impact of the market

- To establish the additional monies brought into the local economy through the Christmas Market, the face to face and online visitor surveys asked respondents if the Bath Christmas Market was the main reason for their choosing to visit Bath on this occasion.
- This report looks at visitor expenditure on two levels as shown below;
- **All associated spend** – This is all spend connected to those attending the market. So spend at the market and away from the market for all visitor types and including the full length of stay in the city for staying visitors.
- **All additional associated spend** – This is all spend connected to those attending the market for whom the Christmas Market was the main reason for their staying trip to Bath or the main reason for their day visit to the city – these are classed as influenced visitors. This covers all spend at and away from the market for all influenced visitor types.
- Further economic outputs contained within this chapter for business turnover and employment supported by visitor spend have been estimated using multipliers from the Cambridge Model.
- The Cambridge Model is a computer-based model developed to calculate estimates of the volume, value and economic impact of tourism on a County or District basis. It draws on the combined experience of PA Cambridge Economic Consultants Ltd, Geoff Broom Associates and the Regional Tourist Boards and utilises a standard methodology capable of application throughout the UK. It therefore offers the potential for direct comparisons with similar destinations throughout the country. The approach was the subject of independent validation (R.Vaughan, Bournemouth University) in December 1994. The Model was judged robust and the margins of error acceptable and in line with other modelling techniques.
- The multipliers used for this economic evaluation are the same as those used to calculate Bath & North East Somerset data for their Value of Tourism report in 2018 which was the last year that the area took part in the annual study undertaken by The South West Research Company (for further details of the Cambridge Model see Appendix 3).

Estimating the economic impact of the market

- Further economic outputs contained within this chapter for business turnover and employment supported by visitor spend refer to the following terms which are explained below;

Total business turnover	Business turnover arises as a result of tourist spending, from the purchase of supplies and services locally by businesses in receipt of visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending
Direct employment	Employment arising as a direct result of visitor expenditure
Indirect employment	Employment arising from the purchase of supplies and services by those in receipt of direct visitor expenditure
Induced Employment	Income induced employment arises from expenditure by employees whose jobs are supported by tourism spend
FTE's	Full time equivalent jobs

All associated spend was estimated at approximately £32.5 million – an increase of 4% compared with 2018.

All associated spend

- The spend figures contained within this section relate to the total number of attendees at the Bath Christmas Market, whether influenced to visit by the presence of the market or not. This is all spend connected to those attending the event. So spend at the market and outside the market for all visitor types and including the full length of stay in the city for staying visitors.

ALL ASSOCIATED SPEND	Bath Christmas Market	Other shopping	Food & Drink	Entertainment	Travel & Transport	Total Excl. accommodation	Accommodation	TOTAL INCL. ACCOMM.
On staying trip (STAYING IN BATH CITY)	£1,832,000	£1,884,000	£2,182,000	£290,000	£133,000	£6,321,000	£10,125,000	£16,446,000
Day visitors	£4,268,000	£3,313,000	£2,273,000	£168,000	£130,000	£10,152,000	-	£10,152,000
A local resident /work in Bath	£670,000	£904,000	£327,000	£0	£10,000	£1,912,000	-	£1,912,000
ALL SPEND	£6,770,000	£6,101,000	£4,782,000	£459,000	£273,000	£18,385,000	£10,125,000	£28,510,000
Other staying visitor spend in Bath	£0	£1,167,000	£1,369,000	£612,000	£878,000	£4,026,000	£0	£4,026,000
TOTAL SPEND 2019	£6,770,000	£7,268,000	£6,151,000	£1,070,000	£1,151,000	£22,411,000	£10,125,000	£32,536,000
TOTAL SPEND 2018	£7,604,000	£7,122,000	£7,084,000	£1,345,000	£724,000	£23,879,000	£7,563,000	£31,442,000
TOTAL SPEND 2017	£10,774,000	£13,216,000	£7,875,000	£1,330,000	£391,000	£33,585,000	£5,684,000	£39,269,000
TOTAL SPEND 2016	£7,025,000	£7,939,000	£6,408,000	£1,117,000	£1,161,000	£23,651,000	£4,954,000	£28,605,000
TOTAL SPEND 2015	£9,118,000	£10,336,000	£7,460,000	£1,151,000	£522,000	£28,587,000	£5,211,000	£33,798,000
TOTAL SPEND 2014	£7,108,000	£9,690,000	£5,815,000	£1,120,000	£1,086,000	£24,819,000	£3,407,000	£28,226,000

All associated additional spend was estimated at approximately £25 million - an increase of 4% compared with 2018.

All additional associated spend

- The spend figures contained within this section relate to the total number of visitors that were influenced to visit Bath by the presence of the Christmas Market in the city. This is all spend connected to those attending the market for whom it was the main reason for their staying trip to Bath or the main reason for their day visit to the city – these are classed as influenced visitors. This covers all spend at and outside the market for all influenced visitor types.

ALL ASSOCIATED ADDITIONAL SPEND	Bath Christmas Market	Other shopping	Food & Drink	Entertainment	Travel & Transport	Total Excl. accommodation	Accommodation	TOTAL INCL. ACCOMM.
On staying trip (STAYING IN BATH CITY)	£1,355,000	£1,432,000	£1,629,000	£215,000	£98,000	£4,729,000	£7,695,000	£12,424,000
Day visitors	£3,561,000	£2,840,000	£1,913,000	£140,000	£108,000	£8,562,000	-	£8,562,000
A local resident /work in Bath	£326,000	£452,000	£161,000	£0	£5,000	£944,000	-	£944,000
ALL SPEND	£5,242,000	£4,724,000	£3,703,000	£355,000	£212,000	£14,236,000	£7,695,000	£21,931,000
Other staying visitor spend in Bath	£0	£887,000	£1,041,000	£465,000	£667,000	£3,060,000	£0	£3,060,000
TOTAL SPEND 2019	£5,242,000	£5,611,000	£4,744,000	£820,000	£879,000	£17,296,000	£7,695,000	£24,991,000
TOTAL SPEND 2018	£5,755,000	£5,435,000	£5,415,000	£1,035,000	£552,000	£18,191,000	£5,899,000	£24,090,000
TOTAL SPEND 2017	£8,066,000	£9,896,000	£5,898,000	£996,000	£293,000	£25,149,000	£4,263,000	£29,412,000
TOTAL SPEND 2016	£5,113,000	£5,805,000	£4,695,000	£823,000	£848,000	£17,284,000	£3,703,000	£20,987,000
TOTAL SPEND 2015	£6,537,000	£7,438,000	£5,380,000	£836,000	£377,000	£20,568,000	£3,824,000	£24,392,000
TOTAL SPEND 2014	£5,245,000	£7,017,000	£4,133,000	£774,000	£790,000	£17,958,000	£2,215,000	£20,173,000

Estimating business turnover & employment

In order to estimate the total business turnover and employment generated as a result of the Bath Christmas Market taking place in the city it was necessary to re-align the previous spend categories with those used within The Cambridge Model as shown in the tables on the following page. A number of adjustments and assumptions were made including:

- The re-aligned Retail category includes 'Other shopping' spend plus 66% of the Christmas Market spend which is assumed to have been spent on goods.
- The re-aligned 'Catering' category includes 'Food & Drink' spend plus 33% of the Christmas Market spend which is assumed to have been spent on food and drink.
- The calculations also assume that staying visitors only visit the market on one day.
- The day visitor spend category consists of all day visitor spending plus 33% of residents spend which is assumed to be additional with the remainder likely to have been displaced from elsewhere in the city.
- Based upon previous research it is assumed that 40% of travel and transport spend will take place at the origin of the trip rather than at the destination

Re-aligned spend input categories

ALL ASSOCIATED SPEND – CAMBRIDGE MODEL GROUPINGS	ACCOMMODATION	RETAIL	CATERING	ATTRACTIONS	TRANSPORT	TOTAL
Staying	£10,125,344	£4,271,884	£4,161,461	£902,182	£1,011,128	£20,471,999
Day	£0	£6,604,202	£3,877,638	£168,142	£133,204	£10,783,186
TOTAL ASSOCIATED SPEND 2019	£10,125,344	£10,876,087	£8,039,099	£1,070,323	£1,144,332	£31,255,185
TOTAL ASSOCIATED SPEND 2018	£7,562,637	£11,410,070	£9,119,668	£1,323,965	£696,270	£30,112,610
TOTAL ASSOCIATED SPEND 2017	£5,683,735	£19,029,005	£10,968,669	£1,325,457	£375,676	£37,382,542
TOTAL ASSOCIATED SPEND 2016	£4,953,541	£11,313,951	£8,277,413	£1,116,863	£1,135,946	£26,797,713
TOTAL ASSOCIATED SPEND 2015	£5,210,556	£15,371,259	£10,080,136	£1,138,439	£507,391	£32,307,781
TOTAL ASSOCIATED SPEND 2014	£3,407,000	£13,553,000	£7,768,000	£1,120,000	£1,052,000	£26,901,000

ALL ADDITIONAL ASSOCIATED SPEND - CAMBRIDGE MODEL GROUPINGS	ACCOMMODATION	RETAIL	CATERING	ATTRACTIONS	TRANSPORT	TOTAL
Staying	£7,695,262	£3,222,606	£3,121,178	£679,781	£765,704	£15,484,530
Day	£0	£5,434,577	£3,189,300	£140,240	£109,832	£8,873,950
TOTAL ADDITIONAL ASSOCIATED SPEND 2019	£7,695,262	£8,657,183	£6,310,478	£820,021	£875,536	£24,358,480
TOTAL ADDITIONAL ASSOCIATED SPEND 2018	£5,898,857	£8,984,033	£7,149,611	£1,027,944	£541,966	£23,602,410
TOTAL ADDITIONAL ASSOCIATED SPEND 2017	£4,262,801	£14,798,683	£8,415,732	£994,743	£287,769	£28,759,728
TOTAL ADDITIONAL ASSOCIATED SPEND 2016	£3,702,772	£8,954,578	£6,312,393	£823,324	£843,364	£20,636,431
TOTAL ADDITIONAL ASSOCIATED SPEND 2015	£3,824,027	£11,500,318	£7,441,879	£832,597	£372,576	£23,971,398
TOTAL ADDITIONAL ASSOCIATED SPEND 2014	£2,215,000	£10,114,000	£5,691,000	£774,000	£775,000	£19,568,000

Local business turnover as a result of the total additional associated spending at the market was estimated at approximately £31.5 million.

LOCAL BUSINESS TURNOVER SUPPORTED BY VISITOR SPENDING		
	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	£30,626,000	£23,871,000
Supplier & income induced	£9,881,000	£7,634,000
Total 2019	£40,507,000	£31,505,000
Total 2018	£39,110,000	£30,643,000
Total 2017	£47,226,000	£36,280,000
Total 2016	£34,017,000	£26,145,000
Total 2015	£41,229,000	£30,566,000
Total 2014	£33,577,000	£24,314,000

359 FTEs (491 actual jobs) were supported as a result of the total additional associated spending at the market

EMPLOYMENT SUPPORTED BY VISITOR SPENDING		
Full time equivalent	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	306	238
Indirect	115	89
Induced	42	33
Total 2019	463	359
Total 2018	466	365
Total 2017	533	409
Total 2016	415	317
Total 2015	514	380
Total 2014	413	297
Estimated actual	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	455	353
Indirect	131	101
Induced	48	37
Total 2019	633	491
Total 2018	642	502
Total 2017	739	566
Total 2016	575	440
Total 2015	715	529
Total 2014	575	413

Bath Christmas Market Survey 2019



Trend Data 2003 - 2019



FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Visitor type 2003 - 2019	Local residents	Day visitors	Staying visitors
2003	27%	59%	14%
2004	25%	59%	16%
2006	22%	66%	12%
2008	19%	67%	14%
2010	18%	69%	13%
2012	11%	74%	16%
2014	12%	72%	16%
2015	10%	67%	23%
2016	8%	74%	18%
2017	11%	67%	23%
2018	13%	63%	24%
2019	18%	64%	19%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Group composition 2003 - 2019	Adults only	Adults with children	Average group size
2003	95%	5%	2.17
2004	79%	21%	2.10
2006	86%	14%	2.32
2008	92%	8%	2.10
2010	92%	8%	2.06
2012	90%	10%	2.36
2014	94%	6%	2.33
2015	92%	8%	2.37
2016	92%	8%	2.43
2017	93%	7%	2.32
2018	91%	9%	2.47
2019	92%	8%	2.15

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Age group 2003 - 2019	2003	2004	2006	2008	2010	2012	2014	2015	2016	2017	2018	2019
0-15 yrs.	3%	7%	9%	6%	7%	7%	3%	4%	4%	4%	5%	5%
16-24 yrs.	7%	7%	8%	11%	9%	12%	11%	11%	8%	11%	11%	12%
25-34 yrs.	15%	12%	17%	15%	15%	13%	16%	16%	19%	19%	18%	20%
35-44 yrs.	14%	17%	16%	13%	18%	12%	13%	12%	13%	13%	11%	13%
45-54 yrs.	26%	19%	21%	19%	20%	22%	24%	18%	17%	17%	20%	20%
55-64 yrs.	21%	23%	16%	18%	16%	22%	18%	19%	18%	19%	17%	18%
65+ yrs.	14%	15%	13%	17%	15%	12%	16%	19%	21%	18%	16%	13%

Social grade 2003 - 2019	AB	C1	C2	DE	NR/DK
2003	30%	35%	16%	10%	9%
2004	28%	33%	22%	9%	8%
2006	19%	46%	23%	12%	-
2008	19%	40%	29%	12%	-
2010	23%	49%	20%	8%	-
2012	32%	36%	18%	14%	-
2014	38%	32%	22%	7%	-
2015	36%	35%	19%	10%	-
2016	36%	31%	23%	10%	-
2017	40%	29%	24%	7%	-
2018	36%	34%	20%	10%	
2019					

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Nationality 2003 – 2019	UK	Overseas
2003	93%	7%
2004	94%	6%
2006	89%	11%
2008	94%	6%
2010	94%	6%
2012	97%	3%
2014	98%	2%
2015	95%	5%
2016	96%	4%
2017	94%	6%
2018	97%	4%
2019	93%	7%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

First time/repeat visit to Bath 2003 – 2019	First ever visit	Repeat visit	First time/repeat visit to Bath Christmas Market 2014 – 2019	First ever visit	Repeat visit
2003	20%	80%			
2004	13%	67%			
2006	18%	82%			
2008	10%	90%			
2010	8%	92%			
2012	14%	86%			
2014	15%	85%	2014	37%	63%
2015	17%	83%	2015	38%	62%
2016	16%	84%	2016	36%	64%
2017	19%	81%	2017	33%	67%
2018	19%	81%	2018	34%	66%
2019	19%	81%	2019	35%	65%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Main form or transport 2003 – 2019	2003	2004	2006	2008	2010	2012	2014	2015	2016	2017	2018	2019
Car, van etc.	51%	56%	49%	45%	53%	52%	54%	55%	51%	44%	53%	50%
Coach tour	15%	2%	4%	6%	10%	9%	4%	10%	6%	8%	5%	8%
Bus/coach service	14%	12%	18%	18%	9%	11%	11%	5%	12%	12%	10%	10%
Walked	10%	17%	16%	14%	9%	4%	5%	4%	4%	5%	4%	6%
Train	8%	13%	13%	16%	18%	22%	25%	23%	26%	32%	28%	24%
Bicycle	1%	-	-	1%	-	-	-	-	-	-	-	1%
Other	1%	-	-	-	1%	1%	-	3%	-	1%	2%	-

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Car parking 2003 – 2019	City centre car park	Park & ride	Neither /unsure
2003	54%	24%	22%
2004	53%	29%	18%
2006	39%	31%	30%
2008	41%	34%	25%
2010	48%	33%	19%
2012	41%	31%	28%
2014	42%	28%	30%
2015	46%	29%	25%
2016	34%	35%	30%
2017	36%	31%	34%
2018	35%	25%	40%
2019	37%	44%	19%

When decided to visit the market 2014 – 2019	2014	2015	2016	2017	2018	2019
Come every year	15%	14%	16%	17%	17%	22%
Last year's market	2%	2%	4%	4%	4%	5%
Early in the year (Jan-June)	2%	4%	6%	3%	4%	5%
Over the summer (July-August)	6%	8%	5%	7%	8%	7%
In the last couple of months (Sept-Oct)	23%	32%	29%	29%	28%	26%
In the last couple of weeks (Nov)	26%	26%	25%	23%	22%	21%
In the last couple of days	28%	15%	14%	17%	18%	15%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Whether market main reason for visit 2003 – 2019	Yes	No	Unsure
2003	42%	54%	4%
2004	45%	53%	2%
2006	60%	38%	2%
2008	66%	33%	1%
2010	64%	35%	2%
2012	73%	26%	1%
2014	71%	26%	3%
2015	70%	28%	2%
2016	75%	25%	-
2017	73%	28%	-
2018	76%	24%	-
2019	78%	22%	-

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Ave. length of stay (nights) 2003 – 2019 staying visitors	Nights
2003	2.0
2004	2.0
2006	2.2
2008	2.0
2010	2.0
2012	1.81
2014	2.17
2015	2.03
2016	2.14
2017	2.01
2018	1.75
2.19	2.27

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Ave. duration of stay at the market (hours) 2003 – 2019	Ave. hours	Actual time
2003	1.82	1 hours 49 minutes
2004	1.52	1 hours 31 minutes
2006	2.90	2 hours 54 minutes
2008	2.39	2 hours 23 minutes
2010	2.54	2 hours 32 minutes
2012	3.19	3 hours 11 minutes
2014	3.92	3 hours 55 minutes
2015	3.80	3 hours 48 minutes
2016	3.54	3 hours 32 minutes
2017	4.04	4 hours 2 minutes
2018	3.93	3 hours 56 minutes
2019	3.76	3 hours 46 minutes

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Other activities 2003 – 2019	Other shopping	Visit a tourist attraction	Have a meal out	Attend an organised festive event	Go to the Bath Visitor Information Centre
2003	87%	19%	54%	n/a	n/a
2004	88%	16%	61%		
2006	90%	22%	67%		
2008	93%	21%	71%		
2010	88%	15%	74%		
2012	90%	19%	80%		
2014	85%	21%	76%		
2015	90%	32%	82%		
2016	89%	22%	83%		
2017	86%	25%	76%		
2018	83%	22%	76%		
2019	71%	26%	77%	6%	5%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Attractions visited/planned to visit 2003 - 2019	2003	2004	2006	2008	2010	2012	2014	2015	2016	2017	2018	2019
Roman Baths	54%	65%	47%	37%	44%	30%	44%	42%	44%	50%	46%	48%
The Jane Austen Centre	13%	11%	11%	15%	13%	9%	4%	7%	4%	8%	4%	9%
Fashion Museum	10%	23%	10%	5%	6%	4%	3%	3%	3%	3%	1%	8%
Other	23%	37%	21%	11%	15%	26%	16%	24%	13%	15%	28%	24%
Bath Abbey	n/a	n/a	47%	64%	56%	48%	48%	62%	58%	64%	50%	64%
Thermae Bath Spa	n/a	n/a	10%	18%	17%	28%	23%	21%	24%	13%	14%	13%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

How found out about the Christmas Market 2003 - 2019	2003	2004	2006	2008	2010	2012	2014	2015	2016	2017	2018	2019
Previous visit	20%	32%	30%	37%	43%	38%	49%	48%	50%	47%	51%	48%
Recommendation	14%	16%	28%	25%	32%	37%	33%	33%	28%	35%	34%	34%
Local paper	13%	11%	10%	10%	5%	1%	1%	-	1%	-	2%	3%
Coach operator	11%	3%	4%	4%	5%	5%	3%	5%	2%	3%	2%	3%
Magazine/brochure/flyer	5%	6%	5%	8%	11%	7%	3%	1%	2%	2%	2%	2%
Leaflet/poster	4%	4%	4%	3%	1%	n/a	n/a	-	-	-	-	-
Can't recall	4%	3%		2%	2%	6%	1%	-	2%	2%	-	4%
Internet	3%	6%	12%	13%	12%	22%	16%	31%	25%	20%	19%	15%
Rail promotion (FGW)	-	1%	-	-	-	-	-	-	-	-	-	-
Other	29%	24%	22%	17%	7%	8%	14%	14%	19%	24%	13%	11%
Radio or podcast promotion	-	-	1%	-	1%	1%	1%	1%	-	1%	1%	1%
Social media	-	-	-	-	-	-	2%	2%	3%	8%	7%	4%
E-Newsletter	-	-	-	-	-	-	-	-	-	1%	1%	-
Residents invite	-	-	-	-	-	-	-	-	-	1%	2%	3%
Online advertising	-	-	-	-	-	-	-	-	-	1\$	1%	2%
Bus advertising	-	-	-	-	-	-	-	-	-	1%	-	-

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

<u>Whether recognise www.bathchristmasmarket.co.uk website homepage 2014-2019</u>	2014	2015	2016	2017	2018	2019
Yes	66%	62%	83%	50%	75%	60%
No	27%	33%	17%	40%	15%	35%
Unsure	6%	5%	-	10%	10%	5%
<u>Whether recognise www.visitbath.co.uk website homepage 2014-2019</u>	2014	2015	2016	2017	2018	2019
Yes	39%	39%	34%	54%	27%	31%
No	52%	53%	66%	35%	56%	59%
Unsure	8%	7%	-	12%	17%	10%
<u>Whether recognise Bath Christmas Market advert 2014-2019</u>	2014	2015	2016	2017	2018	2019
Yes	7%	6%	29%	23%	31%	26%
No	91%	94%	70%	73%	66%	69%
Unsure	1%	1%	1%	4%	3%	5%
<u>Whether recognise Bath Christmas Market Guide 2014-2019</u>	2014	2015	2016	2017	2018	2019
Yes	42%	33%	36%	27%	41%	34%
No	57%	67%	63%	71%	59%	64%
Unsure	-	1%	1%	3%	1%	2%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Whether made decision to visit the market after seeing the marketing/promotion for it 2003 – 2019	2003	2004	2006	2008	2010	2012	2014	2015	2016	2017	2018	2019
Yes	31%	25%	39%	39%	26%	15%	12%	36%	24%	10%	11%	20%
No	62%	72%	59%	60%	74%	83%	87%	63%	76%	89%	88%	80%
Don't know	7%	3%	2%	1%	-	1%	1%	1%	1%	1%	1%	-

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

VISITOR SPEND BY CATEGORY 2006-2019 (£/per person/per day)							
	Bath Christmas Market	Other shopping	Eating & drinking	Entertainment	Travel & transport	TOTAL	Accommodation (staying visitors only)
ALL VISITORS 2019	£23.77	£21.42	£16.79	£1.61	£0.96	£64.55	£69.17
ALL VISITORS 2018	£26.84	£18.37	£16.98	£2.04	£1.95	£66.18	£51.65
ALL VISITORS 2017	£37.54	£41.54	£22.09	£2.83	£0.96	£104.96	£50.51
ALL VISITORS 2016	£23.44	£22.07	£16.14	£1.96	£3.48	£67.09	£45.91
ALL VISITORS 2015	£31.75	£30.54	£19.51	£1.83	£1.33	£84.96	£42.71
ALL VISITORS 2014	£25.92	£29.84	£14.69	£1.89	£3.47	£75.81	£31.79
ALL VISITORS 2012	£22.89	£28.06	£17.39	£2.31	£8.09	£78.74	
ALL VISITORS 2010	£19.80	£24.54	£11.66	£1.56	£2.48	£60.04	
ALL VISITORS 2008	£17.53	£24.22	£12.41	£2.84	£3.02	£60.02	
ALL VISITORS 2006	£18.28	£25.81	£9.59	£1.46	£4.90	£60.04	

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Visitors' opinion scores 2014 – 2019	2014	2015	2016	2017	2018	2019
Range of stalls	4.60	4.61	4.60	4.67	4.60	4.56
Quality of stalls	4.71	4.65	4.64	4.74	4.68	4.65
Number of new traders (if been before)	3.77	3.68	3.86	3.77	3.96	4.04
Range of catering stalls	4.14	4.38	4.18	4.33	4.36	4.52
Quality of catering stalls	4.35	4.54	4.41	4.53	4.52	4.61
Ease of finding your way around/signage	4.23	4.10	4.18	4.19	3.98	4.12
Visitor information available on site	3.54	3.99	4.27	3.98	3.85	3.69
Ease of getting around the site/accessing the stalls	4.09	3.82	3.85	4.20	4.32	4.22
Site decoration, lighting etc.	4.41	4.52	4.51	4.66	4.60	4.56
Quality of entertainment	3.97	4.09	4.16	4.32	4.30	4.53
Overall atmosphere	4.44	4.57	4.59	4.74	4.65	4.68

Overall rating of the market 2003 – 2019	2003	2004	2006	2008	2010	2012	2014	2015	2016	2017	2018	2019
Very poor	1%	1%	-	-	-		1%	-	2%	1%	1%	-
Poor	2%	2%	-	-	-		1%	-	1%	-	1%	-
Average	14%	10%	8%	13%	6%	4%	2%	3%	3%	1%	2%	4%
Good	44%	37%	47%	45%	41%	37%	26%	29%	26%	24%	23%	25%
Very good	39%	50%	45%	42%	52%	58%	67%	67%	67%	74%	73%	71%
Ave. score	4.20	4.36	4.35	4.27	4.44	4.54	4.59	4.63	4.56	4.71	4.68	4.67

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Bath Christmas Market Recommendation Score 2010– 2019	Score
2010	+52%
2012	+58%
2014	+72%
2015	+70%
2016	+66%
2017	+79%
2018	+73%
2019	+59%

Bath Recommendation Score 2010– 2019	
2010	+80%
2012	+80%
2014	+87%
2015	+88%
2016	+84%
2017	+90%
2018	+89%
2019	+85%

FACE TO FACE SURVEY RESULTS ONLY (EXCLUDES COMBINED ONLINE SURVEY RESPONSES)

Economic estimates 2014– 2019	2014	2015	2016	2017	2018	2019	% change
Christmas Market visitors	390,000	413,000	429,000	409,000	404,000	403,000	-0.2%
Unique Christmas Market visitors	274,000	288,000	299,000	287,000	283,000	284,000	0.4%
All spend at market	£7,108,000	£9,118,000	£7,025,000	£10,774,000	£7,604,000	£6,770,000	-11.0%
All spend in Bath (including market spend)	£28,226,000	£33,798,000	£28,604,000	£39,269,000	£31,441,000	£32,536,000	3.5%
All associated additional spend	£20,173,000	£24,392,000	£20,987,000	£29,412,000	£24,090,000	£24,991,000	3.7%
All associated additional market spend	£5,245,000	£6,537,000	£5,113,000	£8,066,000	£5,755,000	£5,242,000	-8.9%
All associated additional spend outside of market	£15,000,000	£17,900,000	£15,900,000	£21,346,000	£18,335,000	£19,749,000	7.7%
Average market spend per person	£25.92	£31.75	£23.44	£37.54	£26.84	£23.77	-11.4%



Bath Christmas Market Survey 2019

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