13. APPENDICES

Appendix one.

Results of the Marginal Visitor Study

Objective

"To understand the perceptions, motivations and actions of marginal visitors to Leicester (i.e. those who have an alternative option) within a leisure context, in order to formulate a competitive visitor development strategy".

Main Findings

- 'Leisure' activities are rarely undertaken alone i.e. there are mostly 2 or more people involved. The interaction between people is an important part of the process. Whether it is with family, friends or work colleagues, there are normally several people involved. Claiming 'group appeal' for promotional messages is a potentially unique message.
- Where people go to depends on their local environment i.e. the options available (equidistant between Nottingham and Leicester) or the travel options (local bus, rail or car routes) and the relative ease of making various journeys.
- 'Hearsay' is a significant influence. This word-of-mouth is a powerful tool that could be considered as the basis of a local community campaign. This can influence perceptions dramatically.
- What people do when they go out depends on previous experience - they are more likely to do the regular pastimes in the regular places. These automated 'habits' must be broken in order to encourage consideration of new places and options.
- Knowledge is very scarce and very fragmented. The majority of County residents have an appalling lack of knowledge about what services, facilities and amenities are available to them. The knowledge they do have is likely to be very out of date, and may be incorrect.
- Leisure activities are very local - swimming, leisure centres, sports and so on. It is unlikely that County residents will make use of City facilities unless they regularly visit the City centre.
- Eating and drinking activities are mostly local, in and around the towns. Special occasions do however demand a trip to City venues for a higher quality and wider choice. Again, group activity is the key.
- Arts and culture activities are varied and infrequent. They can be local, depending upon the quality of local community options, or City based. But only a few people are involved.
- Shopping trips (non-grocery) are the key to a lot of the City centre visits. They are proper 'outings'. The regular trips to 'known' destinations are considered to be fun, easy, safe and something that is planned/looked forward to. They happen on a frequent basis. The special trips, often to new (or rarely visited) shopping centres are perceived differently - exciting, new, interesting and full of discovery.

- It is important, however, to appreciate the lack of appeal of unknown destinations. Fear of the unknown is often the reason for never considering a new City centre. This fear must be overcome with information, help and advice. It is a matter of knowledge and trust.
- Leicester City centre is not perceived to be on a comparable level to Nottingham. It is several years behind. Less choice, less atmosphere, less fun, difficult access (no Park and Ride), dirtier, grottier, more litter.....and colourless. This last point perpetuates images of Leicester as a bland, grey, personality deficient place - and especially so when compared with Nottingham.
- Conversely, although Nottingham is perceived as the better destination in a head-to-head trade-off, it is also acknowledged to be much more expensive and often too spread-out. So, building upon Leicester's relative compactness could be a valuable differentiator - especially so if more can be made of the availability of the small arcades and shops.
- City workers have a natural affinity and loyalty to their place of work. They also believe they know the City exceptionally well - (workplace chit-chat?) and would be unlikely to visit other cities. They do, however, have a mental block about going out of the City and then returning later, especially the men who seem loath to brave the journey!

Specific Requirements of Leicester

- Park and Ride facilities, and promotion of their availability.
- A large events venue, capable of attracting big name stars and shows.
- A focal point/obvious centre to the City. An area that embodies the 'heart' of the City. Most frequently cited example being Nottingham's Old Market Square. This point must not be overlooked when considering the possible relocation of Leicester Market.
- Presenting the City more consistently and in a user-friendly style of colour coded sectors (quarters?) shown on a standardised (and simplified street) map, with all amenities shown - possibly as 'different' as the London Underground map.
- Better 'packaging' of the City centre to make it more cohesive and discernible e.g. gateways/boundary signs, and cross-referencing signs to different areas.

- *Fewer buses in the City centre*

- slow them down

- stop their engines

- more understandable departure details (when and where).

- More welcoming approach by foot from the railway station.
- Craft fairs, festivals and fairs in the City centre at seasonal times.
- Add more colour to the City centre. 'Colour' can extend to include 'personality' e.g. more creative imagery and large street maps painted on large expanses of wall, visual devices to raise people's eyelines above shop front level, sculptures and so on.

Appendix Two.

LEICESTER VISITOR SURVEY 2000

EXECUTIVE SUMMARY

'Objective'

1. To establish the structure of the visitor market to Leicester by non-Leicester residents
2. To establish visitor profiles for each sector of the visitor market, e.g. day tripper, overnight, overseas, etc…
3. To gain a detailed understanding of current visitor motivations, information use, awareness, opinions, activity and movement within Leicester.
4. To Identify the importance of activities in terms of raising the profile of the areas tourism image.
5. To determine the perceptions of new and repeat visitors to Leicester
6. To identify the varying level of spend in Leicester by the market segments

Over the four months of surveying, a total of 1,079 interviews were carried out with visitors to Leicester. Interviewing was carried out on some 100+ days including weekdays and weekends at locations including the city centre and at visitor attractions in the surrounding environs such as New Walk Museum, Cathedral, Belgrave Road and the Shires Shopping Centre. The survey used a simple random sample of visitors, excluding residents of Leicester where the interview was carried out.

Types of Visitor:

The survey sample contains five different types of visitor to the area.

i. Day visitors from home.
ii. Touring UK
iii. Overnight UK
iv. Touring Overseas
v. Overnight Overseas.

The touring visitor market falls between those on a day out from home and those staying overnight in the city area. Touring visitors are either passing through en-route between two different places or on a looped visit out from a holiday base, for example, a Lincolnshire resident on holiday in Leicestershire and coming to the area for a day out. Those en-route would include those passing through the area, for example, on their way from a visit to Norwich to another destination, such as Birmingham.

* 84% of all visitors to the area are on a day trip from home;
* 4% are domestic visitors staying overnight in the area;
* 6% are domestic visitors touring in/through.
* 3% are touring overseas
* 3% are overnight overseas visitors

Origin of Day Visitors:

By separating the various visitor markets it is possible to identify where the current flow is coming from and indicate future target areas for promotional campaigns. The sample is shown on a County basis. The main supplier of visitors is from the county of Leicestershire, accounting for 81% of all day visitors.

4% of visitors are generated from Nottinghamshire, 3% from Northamptonshire and Warwickshire and a further 2% are from Derbyshire.

Origin of Touring Domestic Visitors:

The origin of UK residents touring in the area and its immediate surrounds is headed by visitors from the Heart of England (25%), London (17%) and the North West (14%). Smaller numbers of touring visitors were generated from the East of England (9%), Southern (8%), South East (6%) and Scotland (6%).

Origin of Overnight Domestic Visitors:

A very small sample of 38 visitors were staying overnight. The results for overnight (UK) visitors are presented on a tourist board basis. The areas where overnight visitors are coming from are East of England (29%), Heart of England (16%) and the South East (11%).

Origin of Overseas Visitors:

The sample of overseas visitors is small at only 60 respondents. The leading countries are:

- Canada (17%)
- Ireland (10%)
- Africa (various) (10%)
- Germany (8%)
- USA (8%)

The remainder of overseas visitors are from more than fifteen countries.

New/Repeat Visitors:

9% of visitors are in Leicester for the very first time with 91% being repeat visitors.

In the domestic markets, the proportion of newcomers is higher in the overnight market (21%) and touring (25%) compared with day-trippers (5%). Around 45-59% of overseas visitors had been to the area before.

In all there is a very high level of repeat business, which can be regarded on the one hand as good repeat/recommendation, but on the other hand it is relatively low value spend per head day visitor and not bringing in new markets.

Length of Stay:

The average length of stay in the area for both day and touring visitors was 3 hours and 36 minutes. 55% of day/touring visitors stopped for 1-3 hours and 29% stayed for only 4-5 hours.

Amongst the staying visitors using both commercial accommodation and stopping with friends and family, 46% were stopping for 1-3 nights and 54% for four nights or more. The average (mean) length of stay in Leicester was 3.6 nights for domestic overnight stays and the overseas visitors are remaining in Leicester for 12.7 days on average. In the serviced accommodation sector, the average length of stay for UK visitors was 3.2 nights, just below the average of 3.6 nights when VFR is included. In the VFR sector the UK length of stay was 3.9 nights. Amongst the overseas visitors staying overnight, the average visit using all forms of commercial accommodation was 5.3 nights. The VFR based overseas visitor stopped for an average of 10.8 nights.

Accommodation:

Of the 71 total domestic and overseas visitors staying overnight in the area identifying forms of accommodation, 59% were staying with friends and relatives, 14% in B&Bs/Guesthouses and 10% in hotels. Smaller numbers of visitors stayed in self catering accommodation (8%), university accommodation (4%), in a language school (3%) and in a youth hostel (1%).

Transport:

Cars are the main mode of transport – 47%. However the bus service is important representing 38% of transport means. 10% of all visitors arrive by train/tram and 4% walked.

Purpose of Visit:

The principle motivation behind all types of visits was for shopping, stated by just under half (45%) of visitors surveyed. Quite a long way behind was for leisure/'holiday (25%) and visiting friends and relatives (19%). Visiting Leicester as part of a business/work/conference trip was mentioned by a further

5% of visitors. A further 4% of visitors stated they were in Leicester whilst studying as a language student.

Broader Perceptions / Views of Leicester

Visitors were asked to rate their immediate impressions of Leicester using a scale of 1 (very poor) to 5 (very good). Four out of ten (40%) visitors rated their immediate impression as good and 6% as very good, with just under half (49%) rating it as average. 4% felt the city to be poor or very poor.

Day visitors found the shops the most appealing (35%), whereas the friendly and welcoming feel was most popular with the domestic overnight sector (16%) and the touring overseas sector (11%). Touring overseas visitors most liked the good layout of the city (11%) and 11% of the domestic overnight sector liked the restaurants/eateries.

Visitors were also asked to rate their overall enjoyment of their visit to Leicester. Over half (55%) rated their enjoyment as average, with a further 35% rating their enjoyment as high and 7% as very high. Only 4% of visitors rated their enjoyment as low or very low. The majority of visitors (43%) said it was likely they would recommend Leicester to others, with a further 29% saying very likely.

Group Structure:

69% of all groups are solo visitors and a further 21% are adult couples. Groups of adults and family groups are the smallest visitor segments (both 5%). The average party size was 1.8 people.

94% of visitors did not have children in their party, only 6% had children. This rose to 7% of day and overnight overseas visitors. This reflects the type of attractions and amenities available or not available in the area and the locations of interview.

Socio-economic Groups:

14% of visitors are classified as AB, 33% as C1, 22% are C2 and 31% are DE. The lowest level of ABC1 visitors lies in the day visitor segment (43%).

Visitor Spending in the Local Economy:

Overall visitor spending varies significantly between the market segments. However, in total, all visitor spending went on to the following range of services:

Eating/drinking out (17%), shopping (71%), entertainment (1%) and transport/fuel (11%).*
The spend per head by market segment varies from UK Day Visitor £21.44 per head per day, through UK touring £35.60 per head per day, to UK Overnight (all) £24.97 per head per night, Overseas touring at £20.40 and Overseas overnight £25.90 per head per night.

* Accommodation was excluded from this analysis due to a small sample size of overnight visitors.

Appendix Three.

LEICESTER CITY DESTINATION BENCHMARKING 2000

EXECUTIVE SUMMARY

Introduction

The Heart of England Tourist Board was commissioned by Leicester Promotions in the summer of 2000 to undertake a Visitor Survey across the city, to provide an appraisal of the visitor profile and views of those visiting the city. A detailed Visitor Survey Report has been produced as a separate exercise looking broadly at profiles, origins, activities, spend, etc. This Destination Benchmarking report represents a specific analysis of visitor perceptions about the quality of the tourism experience across the city. It is based upon the principles of Destination Benchmarking, structured to provide associated benchmarking of results with other consistent surveys carried out across the country.

Destination Benchmarking

Benchmarking is one of the key buzzwords of current society:

Benchmarking, by measuring performance against competitors enables businesses to identify areas of their own product, service or process where they are under-performing and attention is required. It also helps to identify strengths which can be capitalised upon and promotes the sharing of good practice.

As part of 'best value' monitoring, the same principles can be applied to visitor destinations such as towns, based on obtaining the opinions of visitors or residents through face to face surveys on a wide range of factors or indicators which together comprise 'the visitor experience'. This includes the cleanliness of streets and public toilets, adequacy of car parking, the quality of local pubs/restaurants, the friendliness of local people/traders, etc.

During 2000, the English Regional Tourist Boards conducted surveys in 33 destinations throughout England, 11 of which were large towns/cities, to obtain visitors' opinions. Indicator scores for similar types of destinations across the country are then compared to identify relative performance and best practice.

Each factor was rated on a range of one to five, where 1= 'very poor' (or the most negative response), 2= 'poor', 3= 'average', 4= 'good' and 5= 'very good' (or the most positive response), allowing an opinion score out of a maximum of five to be calculated. As a general guide, when using a five point scale (ie for samples of 100-1000), there must be a difference of at least 0.2 between two mean scores for this to be significant.

Leicester Methodology

The Leicester City Destination Benchmarking Survey was carried out during August and September 2000 covering some 30 days over the peak and shoulder months, with interviewing taking place both at weekends and weekdays. Only the City Centre survey provides the Destination Benchmarking context with other national destinations. A total of 442 interviews with visitors to Leicester City Centre were carried out during the August and September benchmarking national timescale.

The rest of the city was surveyed in order to provide comparisons with the city centre. With two separate visitor questionnaires, the interviewers were scheduled to carry out surveys at different times and different locations. A further 637 wider city interviews were carried out over some 42+ days, across the area.

Interviewing was carried out at a range of city centre on street locations, as well as at visitor attractions. The wider city survey included a broad range of locations, as well as the main visitor attractions.

Types of Visitor

	City Survey	***Wider City Survey***
• Domestic day trip from home	82%	82%

•	Domestic visitors touring in/through	7%	6%
•	Domestic visitors staying overnight in Leicester	5%	4%
•	Overseas visitors	6%	6%

New / Repeat Visitors

	City Survey	***Wider City Survey***
repeat	88%	90%
new	12%	10%

10% of visitors are in the wider Leicester area for the very first time with 90% being repeat visitors. The proportion of newcomers is slightly higher in the city centre (12%).

Purpose of Visit

Just under half (48%) of all visitors in the city centre were on a shopping trip with a further quarter (25%) being there as part of a leisure/holiday visit. Visiting friends and relatives was popular for overnight visitors to the city centre (39%). The main purpose for visitors in the wider area was for shopping (45%), followed by leisure/holiday (25%).

Accommodation Benchmarks

Those visitors staying overnight in commercial accommodation were asked to rate the quality of service using a scale from 1 (very poor), 2 (poor), 3 (average), 4 (good) to 5 (very good). Only a small number (c18- 21 people) provided scores so the results cannot be taken as representative of the whole accommodation sector. Compared to other large towns and cities, Leicester city centre's accommodation quality is rated a little below average at 4.10, and noticeably below the national averages of 4.32 and 4.27 in its scores. Value for money in the accommodation sector also rates below the large towns/cities and national destinations averages, but is similar to the all destinations 5/5 scores.

Mode of Transport

Cars are the main mode of transport for all city visitors (44%), this rises to 47% in the wider city area. In the city centre 46% of day visitors used a car compared with only 18% of overnight visitors. Buses and coaches were used by 41% of all city visitors (42% day, 26% overnight). Across the wider city 38% of visitors came by bus/coach.

Smaller numbers (11%) in the city used the train (10% day, 15% overnight), whilst 10% across the wider city came by train. In the city centre 5% arrived by walking, this compares with only 4% in the wider city area.

Parking Benchmarks

Those city visitors using car parks rated the ease of parking as 3.75 out of 5, with 24% saying it was very easy, less than the large towns and cities average and below the national all destinations average (both 4.03). City wide, visitors rated parking slightly lower, at 3.67 with similar numbers of visitors compared with the city centre survey saying the ease of parking was very easy.

The cost of parking rated 2.24 out of 5 for city visitors, with only 1% stating it to be very reasonable, figures far below the national averages. Ratings from across the city were marginally higher at 2.29 with 2% saying the cost of parking was very reasonable.

Attractions

Ratings for the range of attractions in Leicester City Centre is slightly less than the national average at 3.88, and below the Large Towns and Cities benchmark of 4.00. This is presumably related to the scale of attractions being smaller in Leicester city centre than in other destinations. They also do not rate as high on the 5/5 scale.

The quality of service at attractions in the city rates slightly less than large towns/cities and all destination benchmarks of 4.05 and 4.06, but has received similar 5/5 ratings.

Value for money has received higher ratings of 4.01 compared with the large towns/cities average of 3.96 and the all destinations score of 3.92. It also received higher 5/5 ratings than the national averages.

City wide visitors gave lower average scores, but slightly more very good 5/5 ratings.

Places to Eat and Drink

The range of places to eat and drink in Leicester City Centre is rated above the large towns and cities national average and the all destinations average at 4.31. The number of very good 5/5 ratings were also higher at 53%.

For quality of service the results are clearly positive, being above both the large towns/cities and all destinations benchmarks. Value for money is rated slightly less than large towns/cities average at 3.93, but above the all destination average of 3.90.

City wide, visitors also hold the eating and drinking places in quite high regard like the city centre visitors, scoring a fraction higher on the scales for each attribute, and virtually always above the national Destination Benchmark.

Ease of Finding Way Around

All signs, maps and display boards in Leicester City Centre rate below national and large towns/cities averages. Day visitors were generally a little more positive in their ratings than overnight visitors, although they gave slightly less 5/5 ratings. City wide scores were higher than those of city centre visitors.

Shopping

The range of shops in Leicester City Centre are rated the same as large towns/cities and above the all destinations benchmark. The quality of the shopping environment and quality of service rate particularly well, higher than the all destinations average, but lower than the large towns/cities average. There was some difference between day and overnight visitors' perception ratings, with higher ratings by the day visitor sector.

City wide views provided similar ratings, with a slightly lower scoring on the range of shops, but higher ratings on the quality of the shopping environment and the quality of service.

Parks, Open Spaces and Streets

Visitors to the city centre rated the upkeep of parks and open spaces as 3.72, below the large towns/cities benchmark of 3.97 and all destinations benchmark of 4.15. Overnight visitors gave a slightly higher rating of 4.11 and higher 5/5 scores.

The cleanliness of the streets rated as 2.83, significantly lower than the national benchmarks of 3.63 and 3.95. Only 3% of city centre visitors gave scorings of 5/5, this compares with 20% in the large towns/cities benchmark and 29% in the all destinations.

Public Toilets

The availability of toilets in Leicester City Centre rate 0.60 points below the national average and 0.53 below the large town/city average, with city wide ratings similarly below, or in reality a global 'average' situation. Only 5% of all visitors to Leicester rated the availability of toilets as very good; this rose to 8% for overnight visitors but was still significantly below the very good 5/5 scores for all benchmarks.

The cleanliness of toilets also rated below the national and large town/city averages, with only 3% of all visitors stating that they were very good, compared with 23% in the large towns and cities benchmark.

Nightlife

The choice of nightlife and entertainment in Leicester city centre rates slightly below the large towns/cities benchmarks, but was slightly above all destinations benchmarks of 3.77. Similarly, 46% of visitors in Leicester city centre gave scores of 5/5. This compares with 46% of visitors in large towns/cities and 31% in all destinations.

Welcome / Atmosphere

The general atmosphere is rated below the national and large town/city averages of 4.16 and 4.23. Over a quarter (27%) of visitors to the city centre rated the general atmosphere as very good. This compares with 36% in the large towns/cities benchmark and 37% in the all destinations benchmark.

The welcome ratings were all below the national and large town/city averages. 21% of all visitors to Leicester City Centre rated the welcome as very good, compared to 38% in the all destinations benchmark and 37% in the large towns/cities benchmark.

Feeling of Safety / Overcrowding

Feeling safe from traffic in Leicester city centre was rated at 3.64, slightly below the large towns/cities benchmark of 3.98 and the all destinations benchmark of 3.96. 21% of visitors strongly agreed with this statement, marginally lower than the national benchmarks of 29% and 25%.

Similarly feeling safe from crime also rated lower than national benchmarks at 3.57 and received lower very good 5/5 ratings.

City wide, visitors gave marginally higher ratings, but these were still lower than the national benchmarks.

Tourist Information Centre

13% of all city visitors had visited the TIC during this visit, varying between 11% of day visitors and 33% of staying visitors who had been into the TIC. In the wider city area, 11% had visited the TIC during their visit, this rose to 33% of overnight visitors and decreased to 9% of day visitors. The results will be slightly biased with a slightly higher level of use by the presence of interviews near to, but not at the TIC. In the Visitor Survey report, a more detailed use of TIC and other information sources is provided.

Visitors to Leicester City Centre were asked to rate the ease of finding the TIC. 37% thought that it was very easy with an overall rating given of 3.84 out of 5, less than the average for large towns/cities and all destinations.

Visitors were also asked how they rated the quality of service, which averaged 4.34 out of 5 and 51% thought that the service was very good. Compared to the national and large towns/cities benchmarks Leicester city centre performed just below average, however the quality of service gained more 5/5 ratings than the national benchmarks.

Visitors were asked to rate the usefulness of the information given at the TIC. 41% thought that the information was very good, rating it 4.18 out of 5. Compared to the national and large towns/ cities benchmarks, usefulness of information in Leicester City Centre performed a fraction below par and had slightly less 5/5 ratings.

Level of Enjoyment / Likes about Leicester

Overall enjoyment in Leicester city centre rates slightly below the large towns/cities and all destinations averages. Only 6% of visitors in the city centre rated the overall enjoyment of their visit as 5/5. This was much lower than the national averages of 24% and 27%. Visitors in the wider city area had similar ratings to those in the city centre.

Like about Leicester City Centre

	City survey	Wider city survey
• Shopping	23%	33%
• Market	10%	8%
• Friendly	5%	5%
• Museum	3%	3%
• Nothing	3%	6%
• Parks	3%	2%
• Good Layout	3%	3%
• Nice Place	2%	3%
• Convenient	2%	6%
• History	2%	2%
• Restaurants/Cafes	2%	3%
• Architecture	2%	3%
• Pubs/Nightlife	2%	2%
• Compact	2%	1%

Factors Spoiling this Visit

Visitors were asked if anything had spoilt their visit to Leicester City Centre. 24% of the city visitors said that nothing had spoilt their visit to Leicester City Centre and 53% gave no reply. In the wider city, 43% gave no reply and a further 34% said nothing had spoilt their visit.

Most general comments related to signage, traffic, litter and toilets and were only noted by 1-3% of respondents.

Likelihood of Recommending a Visit to Others

When asked if they would recommend a visit 30% of visitors in the city centre said it was very likely and 30% of visitors city wide said it was very likely.

The overall rating of recommending Leicester to others is 3.90, slightly below the national benchmarks of 4.29 and 4.31. Visitors giving scores of 5/5 were slightly less at 30%, compared with the national benchmark averages of 51%.

SCORES	LEICESTER CITY CENTRE	LARGE TOWNS AND CITIES
ACCOMMODATION		
Quality of service	4.10	4.32
Value for money	4.00	4.23
PARKING		
Ease of Parking	3.75	4.03
Cost of Parking	2.24	3.28
ATTRACTIONS		
Range	3.88	4
Quality of service	3.97	4.05
Value for money	4.01	3.96
PLACES TO EAT & DRINK		
Range	4.31	4.19
Quality of Service	4.12	4.07
Value for money	3.93	3.97
SHOPPING		
Range	4.33	4.33
Quality of Environment	4.17	4.22
Quality of Service	4.05	4.14

EASE OF FINDING WAY AROUND		
Road Signs	3.73	3.90
Pedestrian Signs	3.68	3.98
Display Maps & Info Boards	3.42	3.86
PUBLIC TOILETS		
Availability	2.89	3.42
Cleanliness	3.13	3.68
PARKS, OPEN SPACES & STREETS		
Upkeep of Parks/Open Spaces	3.72	3.97
Cleanliness of Streets	2.83	3.63
CHOICE OF NIGHTLIFE/ENTERTAINMENT		
Choice of etc...	4.08	4.13
WELCOME / ATMOSPHERE		
General Atmosphere	3.93	4.16
Feeling of Welcome	3.77	4.16
FEELING OF SAFETY		
Felt quite safe from traffic	3.64	3.98
Felt quite safe from crime	3.57	3.80
TOURIST INFORMATION CENTRE		
Ease of finding	3.84	3.94
Quality of Service	4.34	4.38
Usefulness of Information	4.18	4.39
ENJOYMENT OF VISIT		
Overall Enjoyment	3.46	3.97
LIKELIHOOD OF RECOMMENDING VISIT		
Likelihood	3.90	4.29

Destinations included in the 2000 survey are shown below along with additional destinations from 1999 and the 1998 pilot

Seaside Resorts		Large Towns/Cities		Historic Towns	
1999	**1998**	**1999**	**1998**	**1999**	**1998**
Eastbourne	Scarborough	Telford/Ironbridge	Liverpool	Guildford	Chester
Hastings	Redcar	Peterborough	Bolton	Cheltenham	Winchester
Great Yarmouth	Southport	Hull	Manchester	Lichfield	
Clacton-on-Sea	Blackpool	Sheffield	Darlington	Colchester	
Weston Super Mare		Portsmouth	Leeds	Bath	
Torquay		Fareham		York	
Brighton *		Gosport		Oxford	
		Sunderland		Salisbury	
		Blackburn			
		Stockport			
		Brighton*			

Seaside Resorts	Large Towns/Cities	Historic Towns
2000	**2000**	**2000**
Bridlington	Newcastle	Shrewsbury
Southshields	Gateshead	Tunbridge Wells
Whitley Bay	Shrewsbury	Maidstone
Margate	Stoke on Trent	Chichester
Hastings	Leicester	Guildford
Hayling Island	Manchester	Battle/Rye
Blackpool	Liverpool	Winchester
Weston Super Mare	Rochdale	Oxford
Burnham on Sea	Wigan	Salisbury
Lowestoft	Bury	Ely
Southend on Sea	Bolton	Colchester

* Brighton has been benchmarked against both Resorts and Large Towns/Cities

Results throughout the report are based on the 2000, 1999 and 1998 destinations where appropriate.

Appendix Four.

LEICESTER HOTEL DEMAND STUDY - EXECUTIVE SUMMARY

Leicester's Existing Hotel Market

a) 3 and 4 Star Hotels

Leicester currently has a broadly stable 3 and 4 star hotel market, with supply and demand well balanced. Existing 3 and 4 star hotels are generally trading well, but not turning away very much business, and there has been very little growth in occupancies and achieved room rates over the past three years.

b) Budget Hotels

The picture is somewhat different in the budget hotel sector. The existing budget hotels at Meridian and Leicester Forest East are currently achieving very high occupancies, and are turning away significant levels of business during the week.

The Potential for Growth in Hotel Demand

While there is evidence of some potential for growth in Leicester's hotel market, the Leicester market is unlikely to see significant overall growth over the next 5 years.

There is evidence to suggest some expansion in the city's indigenous business market. There is also some potential for growth in the corporate residential conference market, although this may be tempered by the trend towards smaller and shorter duration meetings.

Although Leicester is losing some large association conference business due to its lack of a major conference centre, and the limited availability of hotel bedrooms, it is debatable whether the business that is being lost would, in itself, be sufficient to support further new hotel development.

There is some, but relatively limited potential (at least in the short term) for growth in leisure break business. The NSSC is unlikely to generate significant levels of leisure break business by itself, but will hopefully provide the catalyst for the further development of Leicester's visitor product: until such time as the city's overall visitor product is more fully developed, it is unlikely that Leicester will develop much further as a short break destination.

The Likelihood and Potential Impact of New Hotel Development

(a) Swallow Hotel, Grove Park

It is not difficult to see why Swallow have decided to build at the Grove Park site: it is such a strategic site, and a new hotel here will fit well with Swallow's existing portfolio, giving the company a stronger presence in the Midlands.

The new hotel will undoubtedly compete well in the national conference market, and should thus help to bring at least some additional conference business to Leicester.

It will inevitably take business from the Stakis, the Holiday Inn, and the city's other main hotels. With the current state of Leicester's hotel market, we would suggest that the new Swallow will have to compete on price: the market is not sufficiently buoyant for it to do otherwise. The clear danger, therefore, is that the opening of the Swallow will result in a price war between the 3 and 4 star hotels in the area. This would be in nobody's interests, and in the long run all hotels in the area would lose out. It is to be hoped that the existing hotels and Swallow can reach some form of mutual agreement about rates to avoid this situation arising.

(b) Budget Hotel Development - M1 Corridor

While there is clear potential for at least one, and possibly two more budget hotels around Junction 21 of the M1, land availability is a major constraint to further development in this location.

(c) City Centre Budget Hotel Development

With the aggressive expansion plans of budget brands such as Travel Inn Metro and Holiday Inn Express, it will only be a matter of time before city centre budget hotel development takes place in Leicester.

New hotel development in the city centre would undoubtedly help to develop Leicester's city centre and evening economy. New city centre budget hotels may also be able to attract new business to Leicester through the strength of their branding and their central reservations. They will, however, undoubtedly take business from existing hotels in the city, across all sizes and standards, and could pose a serious threat to the future viability of some of the city's existing hotels. It is difficult to see how some of the older and more peripherally located hotel properties will be able to respond effectively to the competitive threat of a significant number of new budget hotel bedrooms in the city centre.

(d) Leicester City FC Stadium Hotel

While the Football Club is still at a very early stage in its thinking about its new stadium, the opportunity for a hotel to be developed on the Bede Island could well be attractive to a budget operator seeking to establish a presence in Leicester. The potential to work with the stadium's proposed conference operation to attract residential conference business would clearly provide an added boost to ensuring viability. It is unlikely, however, that a 4 star operator could be attracted to develop in this location.

(e) Budget Hotel Development in the North of the City

There is potential for a small budget hotel operation to the north of the city centre, possibly on the Outer Ring Road close to the National Space Science Centre, or on the A46 link to the M1. It is highly unlikely that a 4 star hotel operation could be attracted to this location.

Implications for the City's Existing Hotels

Many of the City's existing hotels are already looking at how they can respond to the threat of increased competition from new hotels entering the Leicester hotel market. A number have plans to refurbish and/or upgrade either to ensure that their product remains competitive, or to differentiate themselves from the budget operations that are likely to enter the market. Focussing their efforts on improving and maintaining service standards is clearly one way for existing hotels to ensure that they retain their clientele, and to enable them to compete effectively in the future.

More fully addressing the corporate residential conference market, through more aggressive and targeted marketing (either individually, or collectively with Leicester Promotions), or through the development of their conference product, is another way in which existing hotels could seek to address the competitive threat of new hotels coming into the city.

Implications for the City Council's Planning Policies

It is recommended that the City Council's planning response to the issue of hotel development should be as flexible as possible, leaving market forces to determine how the city'' hotel stock develops and changes.

There is no real need to encourage further hotel development, we would suggest, but equally no need to seek to restrict new development. While sites around Junction 21 are likely to be favoured by most hotel operators, the lack of available sites here is forcing operators to consider city centre locations. Site availability in the city centre is good, provided that hotel developers are prepared to consider clearing sites or redeveloping office blocks.

Equally, there is no real planning or economic development justification for seeking to use planning policy to protect the city's existing hotel stock. New hotel provision is likely to stimulate further improvement and investment in the existing stock, and could also help to rationalise some of the city's poorer quality hotel provision.

In conclusion, therefore, flexible planning policies on hotel development, which allow market forces to determine how the city's hotel stock develops, are the primary requirement at the present time.

Appendix Five.

A VISITOR CENTRE FOR LEICESTER - RECOMMENDATIONS

This facility should be in a major High-Street location with a heavy footfall. It should be a genuine one-stop shop but be clearly and totally focused on improving the experience of visitors to the city be they day trippers, staying visitors or even residents of the suburbs of Leicester who are visitors to the city centre.

The new facility could include the following features:

- All services currently provided by the Every Street Tourist Information Centre
- A comprehensive transport information centre, covering all public transport, park and ride etc., in line with the proposals being devised by Eddy Tyrer and his team.
- A shop mobility function, including pushchair hire
- An audio-visual presentation and small exhibition telling the story of Leicester and introducing visitors to the opportunities the City offers.
- An expanded and enlarged gift shop, specialising in providing an outlet for local manufacturers, crafts people etc.
- A comfort station for visitors, incorporating baby changing, a City Centre crèche, (called for in the barometer) and perhaps a cafe.

This new centre would become the blueprint for other towns and cities throughout Europe and become the focus for Leicester's new tourism ambitions. Given Leicester Promotions' track record for the development of income-generating activities through TICs, the opportunity for this will be further enhanced.

All other developments of visitor centres should where possible be through using technology with touch-screen information systems etc.

Appendix Six.

BRISTOL & BATH COACH TOURISM SURVEY - RECOMMENDATIONS

a. Where setting down points and coach parks are not one and the same, coach parks should be located as close to centres of attraction or venues as possible and linking routes clearly signed.

b. In urban destinations coach parks should not be so remote that the town's central facilities are inaccessible to drivers.

c. Coach parks should provide adequate facilities and amenities for drivers, and for passengers where coach parks are sufficiently close to centres of attraction to serve as setting down points. In the latter case due regard should be paid to the age profile of a substantial coach market segment, and adequate provision should be made for the disabled and less mobile elderly.

d. Coach parks should allow for the care and running maintenance of coaches. Facilities should include washing down facilities and disposal points for both waste water and toilet waste.

e. A modern luxury coach represents an investment of between £150,000 - £250,000 therefore security is a major priority. Overnight coach parks should be contained within secure perimeters and either manned or under CTV surveillance. Parks should be manned as a matter of course during daytime opening hours.

f. Parking charges should be reasonable and in line with those of competing destinations.

Appendix Seven.

CENTRAL LEICESTERSHIRE LOCAL TRANSPORT PLAN

OBJECTIVES BY 2006

- A high quality public transport network offering:
  - high quality bus routes with up to the minute information at stops.
  - park and ride at all the main entries to the Leicester urban area.
  - priority measures to ensure bus service efficiency and reliability.
  - improved local rail service frequencies and at least one new station.
  - integrated ticketing involving all bus companies so that local journeys can be made on all buses, including off-bus sales to reduce stopping times.
  - convenient interchange so that travellers can move easily from one stage of their journey to the next.
  - well-maintained shelters at most stops.

- The completion of a safe network of cycle and pedestrian routes, including the provision of improved access to the public transport network.

- The extension of pedestrianised areas in the City Centre and suburban shopping centres.

- The introduction of a low emission zone in the City Centre where older, more polluting motor vehicles will be prohibited.

- Safer routes to as many schools as possible, and the development of school travel plans, so that children and young people can walk and cycle safely.

- Speed reduction measures, including traffic calming, to improve safety for all.

- Better and quieter road surfaces and, in particular, better surfaces for cyclists and pedestrians.

- Modern technology to make the most efficient use of roads, including giving priority to buses, cyclists and pedestrians where justified. At the same time this will cut journey times in cars to more consistent levels.

- Travel plans agreed with major employers to reduce car dependency for the journey to work.

- Information provision through roadside messages, reports in the press, on radio, on television, on cable networks, on the internet and at the new Travel Information facilities, including at least one new Travel Centre in the City Centre.

- Parking management to protect residents, provide parking for shoppers and visitors to the City Centre, restrict commuter parking to promote sustainable transport and to enforce restrictions.

- A more sustainable freight distribution system.

Appendix 8

BRITISH CITIES MARKETING BOARD DATABASE MAILING, NOVEMBER 2000 - RESULTS ANALYSIS

The BCMB database

- 46,354 records.
- Sourced over 3 years from members, consumer shows and brochure panels.
- Mailed in 1998 and 1999 with member leaflet.
- Cleaned, extended, de-duped and then only best quality/most recent 15,000 contacts taken.

Aims of research

- To clean and profile the list.
- To undertake additional research on member cities/city short breaks.
- To generate enquiries using tick-box facility for participating members.

Research Sample

- 15,000 mailed out to named contacts.
- 2,100 returned (14%).
- About 150 respondents corrected contact details.
- About 10 respondents asked to be removed from the database.

Requests for information

Birmingham	476
Bristol	639
Cardiff	583
Derby	443
Hull	384
Leeds	546
Leicester	355
Manchester	605
Newcastle	624
Plymouth	650
Porstmouth	583
Stoke-on-Trent	456

Sample Profile

		(population)
Male	50.0%	
Female	50.0%	
18-30	6.0%	(21.3%)
31-40	13.9%	(21.1%)

41-50	24.5%	(17.4%)
51-65	34.3%	(22.2%)
65+	21.3%	(18.1%)

Self	13.6%
Self + partner	59.2%
Self + partner + friends	11.7%
Self + partner + family	15.4%

Frequency of break taking

(On average, how many holidays do you take in a year?)

Short breaks		Long breaks	
0	7.4%	0	13.6%
1	17.1%	1	34.4%
2	31.1%	2	34.9%
3	24.2%	3	10.9%
4	13.4%	4	4.3%
5	6.6%	5	1.8%

(Weighted Average = 2.38)

Reason for break taking

(What is the main reason you take short breaks?)

To see a new place	67.3%
Rest and relaxation	55.5%
Visiting friends and relatives	24.8%
Specific event	19.6%
Other	2.7%

City Short Break Taking

(Have you taken a short break in a UK city in the last year?)

Yes 82.7% (24% of whom Visited London)

Cost of city short breaks

(How much would you expect to pay in total for a 2 night short break for 2 people in a UK city?)

Under £150	56.7%
£150-£250	35.7%
£250-£350	7.0%
Over £350	0.6%

Short break activities

Historical attractions	20.1%
Shopping	17.4%
Museums	14.3%
Theatres/concert	13.1%
Art galleries	8.8%
Festival	6.5%
Themed attraction	6.1%
Pubs/clubs	5.9%
Sport	3.5%
Other	6.0%

(gardens, parks, walking, business, National Trust, VFR)

Cities visited

Bristol	29.5%	
Birmingham	28.9%	
Plymouth	28.5%	(Hoe)
Manchester	28.0%	
Portsmouth	27.4%	(Docks)
Leeds	24.6%	
Newcastle	22.1%	
Cardiff	21.2%	
Derby	16.5%	
Stoke-on-Trent	16.3%	(Potteries)
Leicester	12.9%	
Hull	11.7%	

Cities intended

Plymouth	32.0%
Bristol	30.6%
Portsmouth	29.7%
Newcastle	29.1%
Cardiff	28.6%
Manchester	27.6%
Leeds	25.1%
Stoke-on-Trent	23.4%
Birmingham	22.1%
Derby	19.8%
Leicester	15.0%
Hull	14.9%

Most frequently stated reason was ‘a new place’.

Cities favoured

- Cities most favoured by 18-30 year olds

  Birmingham, Cardiff, Leeds

- Cities most favoured by ‘empty nesters’ (51-65 year olds)

  All just about equal, no clear leaders, all within 5% of each other

- Cities most favoured by families

  Derby, Leeds, Portsmouth (but close for all)

- Cities most favoured for shopping

  Leeds, Manchester, Birmingham, Newcastle8