

Bath Christmas Market Survey 2023

Draft Report

Produced for and on behalf of Visit Bath by
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Bath Christmas Market Survey 2023

2023 Snapshot



2023 Snapshot

- This report presents the findings of a face to face survey of visitors to Bath Christmas Market conducted between the 23rd November and 10th December 2023 and an additional online survey sent out by Bath & North East Somerset Council to their market contacts between 13th December 2023 and 8th January 2024.
- Overall, approximately 451,000 people are estimated to have attended the Christmas Market in Bath over the 18-day period between Thursday 23rd November and Sunday 10th December 2023 (426,000 2022 and 403,000 2019). Of these, approximately 323,000 are estimated to have been 'unique' visitors to the event (306,000 2022 and 284,000 2019) and when further analysed by those who said that the market was their main reason for visiting Bath (72% 2023), an estimate of approximately 224,000 unique visitors was calculated (220,000 2022 and 221,000 2019).
- All associated spend in Bath for those attending the market was estimated at approximately £47 million (the same as 2022 and compared with £32.5 million 2019). This figure relates to all spend connected to those attending the market. So, spend at and away from the market for all visitor types and including the full length of stay in the city for staying visitors.
- Business turnover arises as a result of the above market visitor spending, from the purchase of supplies and services locally by businesses in receipt of market visitor spending and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by market visitor spending. The total business turnover derived from all associated spend was estimated at approximately £59.1m (£64.7m 2022 and £40.5m 2019). The number of FTE's supported as a result of this was 609 or 833 actual jobs (781 and 1,046 during 2022 and respectively and 463 and 633 during 2019 respectively).
- All additional associated spend was estimated at approximately £33.2 million – a decrease of -3% compared with 2022 (£34.3m) and compared with £25m 2019. 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 was estimated at approximately £40.5m (£50.7m 2022 and £31.5m 2019).
- The number of FTE's supported as a result of this was 420 or 574 actual jobs (618 and 822 during 2022 and 359 and 491 during 2019 respectively).

2023 Snapshot

- The proportions of staying visitors (27%), day visitors (59%) and residents (15%) remained virtually unchanged compared with 2022 (28%, 58% and 15% respectively of staying, day and resident visitors). The proportion of staying visitors (27%) and residents (15%) visiting the market have also increased compared with 2019 (24% and 12% respectively) whilst day visitors have decreased (63% 2019).
- At 10% the proportion of adults with children groups visiting the market increased by 2% compared with both 2022 and 2019 levels (8% each).
- The average group size at 2.45 people (0.15 children and 2.30 adults) has also increased compared with 2.10 people during 2022 and 2.15 people during 2019.
- The only key change in age profile compared to 2022 was a 7% decrease in visitors aged 65+ years (12% 2023 & 19% in 2022). All other age groups were similar to 2022 proportions.
- 94% of all visitors were from the UK, compared with 97% during 2022 and the same proportion as during 2019. At 6%, the proportion of overseas visitors to the market has doubled compared with 2022 (3%) and returned to pre-pandemic levels (6% 2019). 54% of all visitors lived in the South West of England (56% 2022 and 50% 2019) including 18% within the BA postcode area (19% 2022 and 15% 2019). 41% lived elsewhere in the UK (same proportion as 2022 and compared with 45% 2019).
- At 1.91 nights, the average length of stay amongst those visitors staying overnight in Bath during their visit to the market was lower than during both the 2022 (2.24) and 2019 surveys (2.27 nights).
- Attendance at the market (amongst online survey respondents) was highest during the Friday to Sunday periods with the peak weekend being Friday 1st December to Sunday 3rd December.
- 20% of day visitors who were on holiday staying outside of the city were staying in nearby Bristol, the same proportion as during the 2022 survey and compared with 26% during 2019.
- 92% of staying visitors said they would consider returning to Bath for a short break at another time of the year compared with 95% during 2019 and 91% in 2019.

2023 Snapshot

- On average visitors had spent 4.01 hours or 4 hours 1 minute at the Christmas Market during 2023 – just 5 minutes longer than during 2022 (3.93 hours or 3 hours 56 minutes) but around 16 minutes shorter than during 2019 (4.28 hours or 4 hours 17 minutes).
- At 34%, the proportion of first time visitors to the Christmas market decreased by 3% compared with 2022 but remained 3% higher than during 2019.
- In a similar manner to 2022 and 2019, approximately half of respondents made the decision to visit the market within two months of it taking place (49%, compared with 52% in 2022 and 49% in 2019) with around a third visiting every year (26%) or deciding at last years' market (5%).
- Car/van etc. (54%) was once again the most popular form of transport used to travel to Bath – a similar proportion to both 2022 and 2019
- 55% of respondents arriving in the city by car/van etc. had used a city centre car park – a similar proportion to 2022 (54%) and an increase of 14% compared with 2019 (41%). 24% had used the city's park & ride facility – a decrease of 11% compared with 2022 (35%) and a decrease of 18% compared with 2019 (42%). Double the proportion of 2023 visitors said they hadn't used either a city centre car park or the park and ride or were unsure where they had parked compared with the proportion saying the same in 2022 (11%) and compared with 17% during 2019.
- 72% of visitors indicated that the Christmas Market was their main reason for visiting the city, a similar proportion to 2022 but 7% lower than during 2019 (79%).
- 22% of respondents whose main reason for visiting Bath was not because of market said they were visiting friends or relatives who lived in the city (21% and 28% respectively during 2022 and 2019). 18% said they worked or studied in the city (12% during 2022 and 14% during 2019).
- 74% of respondents indicated that they had/or were planning to have a meal out in Bath (74% and 77% respectively during 2022 and 2019) and 70% had/or were planning to do other shopping in Bath outside of the market (79% in 2022 and 75% in 2019). 18% had/or were planning to visit a tourist attraction in the city (23% and 24% respectively during 2022 and 2019).

2023 Snapshot

- 49% of visitors were prompted to visit the market from a previous visit (48% in 2022 and 54% in 2019), whilst a further 25% had been recommended to visit it (same proportion as 2022 and 2019).
- 10% were prompted to visit via a social media site such as Facebook, Twitter or Instagram etc. – a slight decrease of 4% compared with 2022 but remaining 6% higher than during 2019 (4%).
- 7% were prompted to visit via the internet (same proportion as 2022 and compared with 13% 2019), 2% via online advertising (3% in each case during 2022 and 2019) and 1% by a coach operator (1% and 3% respectively during 2022 and 2019).
- There was a significant decrease during 2023 in the proportion of visitors using the internet to search for information about Bath Christmas Market only (36%) compared with both the 2022 and 2019 surveys (50% in each case). The same proportion, 36%, had used it to source information and to book their accommodation etc. online and this remained similar to both 2022 and 2019 (38% in each case). 36% had used the internet to search for Christmas shopping ideas generally, a 10% increase compared with 2022 (26%) and compared with 32% during 2019.
- 85% said they had been following the market on Facebook, a significant increase compared with the 71% doing so in 2022 and returning to a similar level as during 2019 (82%). 48% were doing the same on Instagram, an increase of 5% compared with 2022 (43%) and more than double the proportion who were doing so during 2019 (22%). 6% were following the market on Twitter, the same proportion as during 2022 and compared with 10% during 2019.
- 19% said they had been influenced to visit by the marketing/promotional materials they had seen compared with 20% and 18% respectively during 2022 and 2019. 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. When these respondents are excluded from the analysis the level of influence of the marketing/promotional materials seen increases to 34% (38% 2022).
- Average visitor spend per person per day at the Bath Christmas Market 2023 was £26.83, compared with £30.15 during 2022 and £23.77 in 2019. In addition, visitors spent an average of £26.16 on shopping elsewhere in the city, £23.82 on eating and drinking, £3.86 on entertainment and £9.36 on travel and transport, all decreases compared with 2022 with the exception of travel and transport spend. Staying visitors spent an average of £70.90 per person per night on accommodation in Bath, compared with £69.23 during 2022 and £67.17 during 2019.

2023 Snapshot

- With the exception of the quality of the stalls (where satisfaction still remained very high), visitor satisfaction levels with their Bath Christmas Market experience increased across the board compared with the 2022 market. Satisfaction levels were also higher than during the 2019 market for almost all aspects other than the range and quality of stalls and the range and quality of the catering facilities. The highest average scores were for the overall atmosphere (4.46), the site decoration, lighting etc. (4.42) and the quality of stalls (4.41) and 10 of the 11 indicators explored by the survey received an average score of 4.00 or more. Just 1 indicator, the number of new traders, received an average score of less than 4.00 (3.85).
- At 4.37 out of 5.00, visitors' overall rating of Bath Christmas Market remained very high and at the same level as during 2022 and slightly lower than during 2019 (4.43).
- For the first time during the 2023 market, visitors were asked if they, or anyone in their party, had any accessibility needs. 7% of visitors said they did. These respondents were asked if they had visited the accessibility section on the Bath Christmas Market website prior to and/or during their visit. The majority of visitors to the market with accessibility needs said they have not visited the accessibility section on the Bath Christmas Market website prior to and/or during their visit (68%). 14% said they had visited it prior to their visit and 9% had done so during their visit. 9% didn't know/were unsure.
- These respondents were also to rate their satisfaction with the information available about the accessibility of the market (those visiting the accessibility section on the website only) and the market overall in terms of accessibility (all those with accessibility needs). Satisfaction levels with the information available about the accessibility of the market (3.53) and the market overall in terms of accessibility (3.27) were considerably lower than the satisfaction scores for all other indicators explored about the market. 13% of respondents rated the information available about the accessibility of the market as 'very poor' (2%) or 'poor' (11%) whilst 18% rated the market overall in terms of accessibility as 'poor' suggesting room for improvement in this area in the future.
- The 2023 Bath Christmas Market achieved a good recommendation score of +33% but it did decrease by -6% compared with the 2022 market score and by -13% compared with the 2019 market.
- 73% of online survey respondents who said they had not visited the market during 2023 had visited the market previously (71% in 2022 and 68% in 2019), 23% had never visited (29% and 32% respectively during 2022 and 2019) and 5% didn't know if they had previously visited the market or not. 36% of online survey respondents who said they had not visited the market during 2023 (8 online respondents) had visited another Christmas market in 2023. 50% of these respondents (4 online respondents) said they chose the other market in direct preference to Bath (50% in 2022 and 40% in 2019).

Bath Christmas Market Survey 2023



Key Findings & Recommendations



Key Findings & Recommendations

- It is clearly evident from the survey findings contained within this report that the 2023 Bath Christmas Market was again a huge success in influencing visits and bringing new money into Bath and continues to paint a positive picture for the event both now and in the future. The event puts Bath on the map in the media in the run up to the Christmas period providing free promotion of the city which undoubtedly generates a level of interest in visiting the area. Overall, approximately 451,000 people are estimated to have attended the event over the 18-day period between Thursday 23rd November and Sunday 10th December 2023 – a record breaking year for attendance (426,000 2022 and 403,000 2019).
- The new money generated in Bath as a direct result of the market taking place (all associated additional spend) was estimated at £33.2 million (£34.3m in 2022 and £25 million in 2019) resulting in a total business turnover for Bath of approximately £40.5m (£50.7m 2022 and £31.5m 2019), supporting 420 FTE's or 574 actual jobs in the city (618 FTE's and 822 actual jobs during 2022 and 359 FTE's and 491 actual jobs during 2019 respectively).
- Whilst attendance was slightly higher but all associated additional spend slightly lower in 2023, these are nonetheless impressive economic returns given the poor economic climate and, in particular, the current cost of living crisis in the UK which has clearly impacted consumer spending.
- Overall, the results have remained relatively stable compared with 2022 and, reassuringly, the level of overseas visitors to the market have returned to 2019 (pre-pandemic) levels. Visitors' satisfaction levels with all aspects of the market have also increased compared with the 2022 market, with the exception of the quality of the stalls where satisfaction only decreased very slightly and nonetheless remained very high. Those attending clearly enjoy the event and, for many, it is seen as integral part of their plans in the build up to the Christmas period each year.
- In terms of information sourcing there has been a significant increase in the proportions of visitors following the market on Facebook compared with 2022 and a return to a similar level as during 2019 and, alongside this, a smaller increase in the proportion of visitors following the market on Instagram year on year but which has more than doubled compared with the proportion who were doing so during 2019.
- The importance of continuing to research and monitor the market is clear to help with highlighting and addressing any issues which are identified by the survey findings. This is even more important moving forward in an ever increasingly competitive market place and will allow for informed local initiatives to be developed to offer an ever improving product for visitors along with marketing guidance for the event organisers.

Bath Christmas Market Survey 2023

Introduction



Background

This report presents the combined findings of a face to face survey of visitors to Bath Christmas Market conducted between the 23rd November and 10th December 2023 and an additional online survey conducted between 13th December 2023 and 8th January 2024. It was commissioned by Bath and North East Somerset Council and undertaken by The South West Research Company Ltd. Research into Bath Christmas Market has been undertaken since 2003 (please note that there was no Christmas Market held in Bath during 2020 and 2021 due to the Covid-19 pandemic).

As in previous years, the 2023 research was designed to provide up-to-date information on the profile, origin and opinions of visitors to Bath Christmas Market. In addition, it was designed to enable comparisons to be made with the previous visitor surveys conducted from 2014 onwards (when there was a change in the survey methodology*) 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 the market to help improve understanding of the impact of it and provide the basis for tourism policies.
- Where possible, make comparisons with the previous studies undertaken since 2014 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.

* From 2014 onwards the survey has included both a face to face and online survey, prior to 2014 it was a face to face survey only.

Methodology

- A face to face questionnaire survey was conducted between the 23rd November and 10th December 2023.
- 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 427 questionnaires were completed.
- In addition to the face to face survey, a link to an online version of the survey was also emailed out by Bath & North East Somerset Council to their market contacts a few days after the market had finished on Wednesday 13th December 2023, as well as promoting the survey on their social media channels.
- A total of 319 useable online survey responses were submitted by the closing date on Monday 8th January 2024, including 297 respondents who had visited the 2023 market and 22 non/lapsed visitors who were included in this research.
- The two approaches above resulted in a combined survey sample of 724 respondents who had visited the 2023 Bath Christmas Market and 22 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 427) **(F2F)**
- Online survey (sample 297) **(ONLINE)**

Visitor type:

- Local resident (Sample 106) **(LOCAL)**
- Day visitor (Sample 421) **(DAY)**
- Staying visitor in Bath (Sample 197) **(STAYING)**

Group composition:

- Adults visiting with children (Sample 43) **(ADULTS WITH CHILDREN)**
- Adults visiting without children (Sample 376) **(ADULTS ONLY)**

Previous visitors to Bath Christmas Market:

- First time visitor to Bath Christmas Market (Sample 249) **(FIRST TIME BCM)**
- Repeat visitor to Bath Christmas Market (Sample 475) **(REPEAT BCM)**

Bath Christmas Market main reason for visiting Bath:

- Market main reason for visiting Bath (Sample 521) **(MAIN REASON)**
- Market not main reason for visiting Bath (Sample 203) **(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 previously 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 43% to 57%.
- 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: 724	Sample: 106	Sample: 421	Sample: 197
10% or 90%	+/- 2.2%	+/- 5.7%	+/- 2.9%	+/- 4.2%
20% or 80%	+/- 2.9%	+/- 7.6%	+/- 3.8%	+/- 5.6%
30% or 70%	+/- 3.3%	+/- 8.7%	+/- 4.4%	+/- 6.4%
40% or 60%	+/- 3.6%	+/- 9.3%	+/- 4.7%	+/- 6.8%
50%	+/- 3.6%	+/- 9.5%	+/- 4.8%	+/- 7.0%

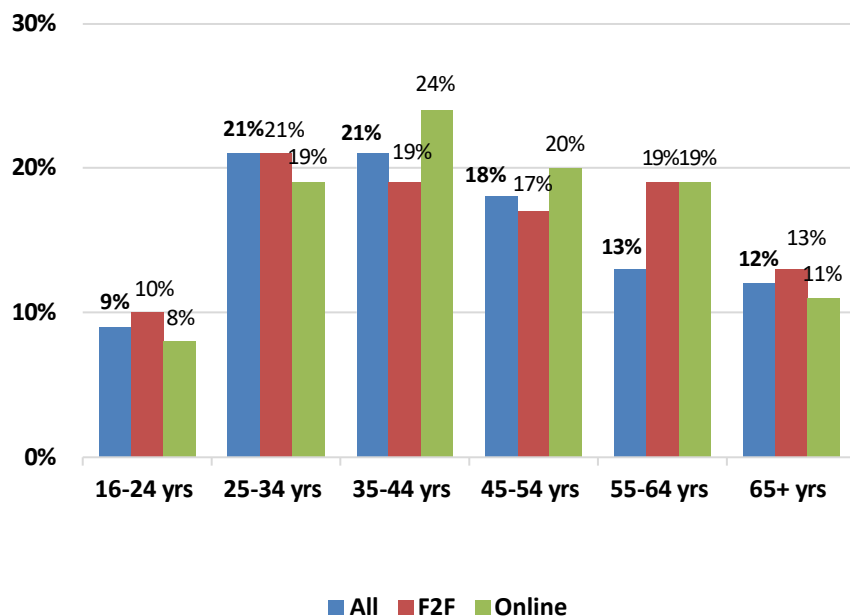
Trend data

- 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. The change in methodology from the 2014 survey onwards also means that the data prior to this is not comparable.
- The results in the slides to follow therefore concentrate on the 2023 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 last three years' data results 2019 – 2022 for all visitors only.
- For a full breakdown of the results by survey year from 2014 onwards, please refer to the Trend Data 2014 – 2023 chapter at the back of this report.

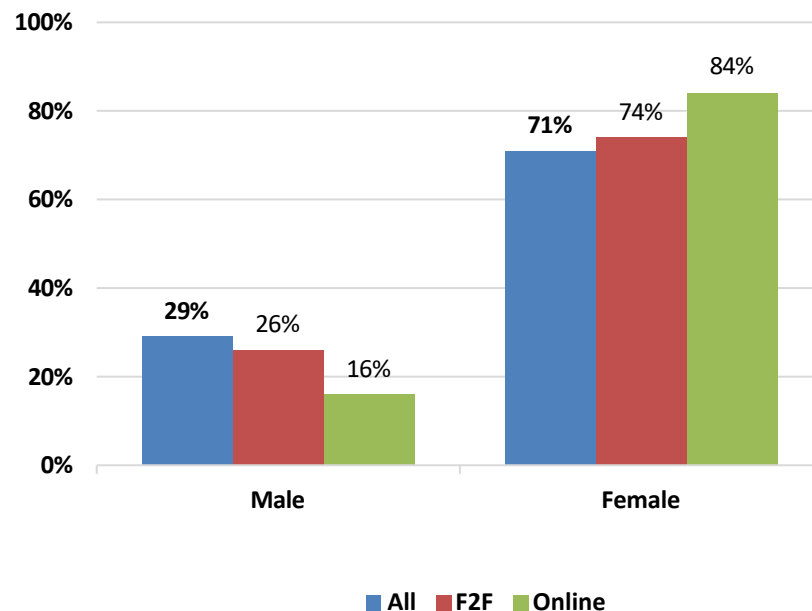
42% of respondents taking part in the survey were aged 25-44 years and 31% were aged 45-64 years.

71% of all respondents were female.

Survey respondent age group



Survey respondent gender



- The largest proportions of respondents taking part in the survey were aged 25-44 years (42%). 31% were aged 45-64 years, 12% were aged 65+ years and 9% were aged 16-24 years.

- 71% of all respondents participating in the survey were female.

Bath Christmas Market Survey 2023

Estimating the Economic Value of the 2023 Market



The 2023 Bath Christmas Market attracted approximately 224,000 unique visitors.

- Overall, approximately 451,000 people are estimated to have attended the Christmas Market in Bath over the 18-day period between Thursday 23rd November and Sunday 10th December 2023. This figure is estimated from local data provided for transportation usage in the city alongside Bath seasonality data and survey data and compares with 426,000 people attending the market in 2022 and 403,000 people in 2019 (pre-Covid).
- Of the total 451,000 people visiting the market over the 18 days approximately 323,000 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 224,000 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 (451,000) 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)	123,000	1.5	82,000	72%	59,000
On staying trip (STAYING OUTSIDE BATH CITY)	34,000	1.5	23,000	75%	17,000
On a day trip from home	228,000	1.5	152,000	83%	126,000
A local resident /work in Bath	66,000	1	66,000	34%	22,000
Total 2023	451,000		323,000		224,000
Total 2022	426,000		306,000		220,000
Total 2019	403,000		284,000		221,000

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 2022 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;

Term	Definition
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 £47 million, the same as during 2022.

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)	£2,871,000	£2,995,000	£4,663,000	£1,292,000	£1,406,000	£13,227,000	£11,970,000	£25,197,000
Day visitors	£4,763,000	£4,047,000	£3,303,000	£278,000	£1,658,000	£14,050,000	-	£14,050,000
A local resident /work in Bath	£1,229,000	£2,047,000	£823,000	£84,000	£293,000	£4,476,000	-	£4,476,000
ALL SPEND	£8,863,000	£9,089,000	£8,789,000	£1,654,000	£3,357,000	£31,753,000	£11,970,000	£43,723,000
Other staying visitor spend in Bath	£0	£1,072,000	£1,032,000	£471,000	£877,000	£3,452,000	£0	£3,452,000
TOTAL SPEND 2023	£8,863,000	£10,161,000	£9,821,000	£2,125,000	£4,234,000	£35,205,000	£11,970,000	£47,175,000
TOTAL SPEND 2022	£9,220,000	£10,554,000	£9,108,000	£3,367,000	£2,862,000	£35,111,000	£11,875,000	£46,986,000
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

All associated additional spend was estimated at approximately £33.2 million, a decrease of 3% compared with 2022.

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)	£1,997,000	£2,212,000	£3,238,000	£903,000	£958,000	£9,307,000	£8,619,000	£17,926,000
Day visitors	£3,770,000	£3,402,000	£2,611,000	£221,000	£1,285,000	£11,290,000	-	£11,290,000
A local resident /work in Bath	£403,000	£714,000	£270,000	£28,000	£94,000	£1,509,000	-	£1,509,000
ALL SPEND	£6,170,000	£6,328,000	£6,119,000	£1,152,000	£2,337,000	£22,106,000	£8,619,000	£30,725,000
Other staying visitor spend in Bath	£0	£772,000	£743,000	£339,000	£632,000	£2,485,000	£0	£2,485,000
TOTAL SPEND 2023	£6,170,000	£7,100,000	£6,862,000	£1,491,000	£2,969,000	£24,591,000	£8,619,000	£33,210,000
TOTAL SPEND 2022	£6,595,000	£7,596,000	£6,588,000	£2,431,000	£2,086,000	£25,295,000	£9,025,000	£34,320,000
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

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 34% 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	£11,970,343	£5,961,846	£6,670,717	£1,762,962	£2,283,499	£28,649,367
Day	£0	£10,049,072	£6,163,523	£362,378	£1,950,863	£18,525,836
TOTAL ASSOCIATED SPEND 2023	£11,970,343	£16,010,918	£12,834,241	£2,125,340	£4,234,361	£47,175,203
TOTAL ASSOCIATED SPEND 2022	£11,875,119	£15,185,385	£11,196,270	£3,270,517	£2,668,724	£44,196,014
TOTAL ASSOCIATED SPEND 2019	£10,125,344	£10,876,087	£8,039,099	£1,070,323	£1,144,332	£31,255,185

ALL ADDITIONAL ASSOCIATED SPEND - CAMBRIDGE MODEL GROUPINGS	ACCOMMODATION	RETAIL	CATERING	ATTRACTIONS	TRANSPORT	TOTAL
Staying	£8,618,647	£4,301,291	£4,659,600	£1,241,856	£1,589,286	£20,410,680
Day	£0	£6,213,932	£4,027,139	£230,339	£1,316,406	£11,787,816
TOTAL ADDITIONAL ASSOCIATED SPEND 2023	£8,618,647	£10,515,223	£8,686,739	£1,472,195	£2,905,692	£32,198,496
TOTAL ADDITIONAL ASSOCIATED SPEND 2022	£9,025,090	£11,434,795	£8,421,496	£2,396,122	£2,014,918	£33,292,421
TOTAL ADDITIONAL ASSOCIATED SPEND 2019	£7,695,262	£8,657,183	£6,310,478	£820,021	£875,536	£24,358,480

Local business turnover as a result of the total additional associated spending at the market was estimated at approximately £40.5 million.

LOCAL BUSINESS TURNOVER SUPPORTED BY VISITOR SPENDING	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	£45,483,000	£31,037,000
Supplier & income induced	£13,636,000	£9,465,000
Total 2023	£59,119,000	£40,502,000
Total 2022	£64,737,000	£50,728,000
Total 2019	£40,507,000	£31,505,000

420 FTEs 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	405	278
Indirect	149	104
Induced	55	38
Total 2023	609	420
Total 2022	781	618
Total 2019	463	359

574 actual jobs were supported as a result of the total additional associated spending at the market.

EMPLOYMENT SUPPORTED BY VISITOR SPENDING - ESTIMATED ACTUAL	ALL ASSOCIATED SPEND	ALL ADDITIONAL ASSOCIATED SPEND
Direct	601	413
Indirect	170	118
Induced	63	44
Total 2023	833	574
Total 2022	1,046	822
Total 2019	633	491

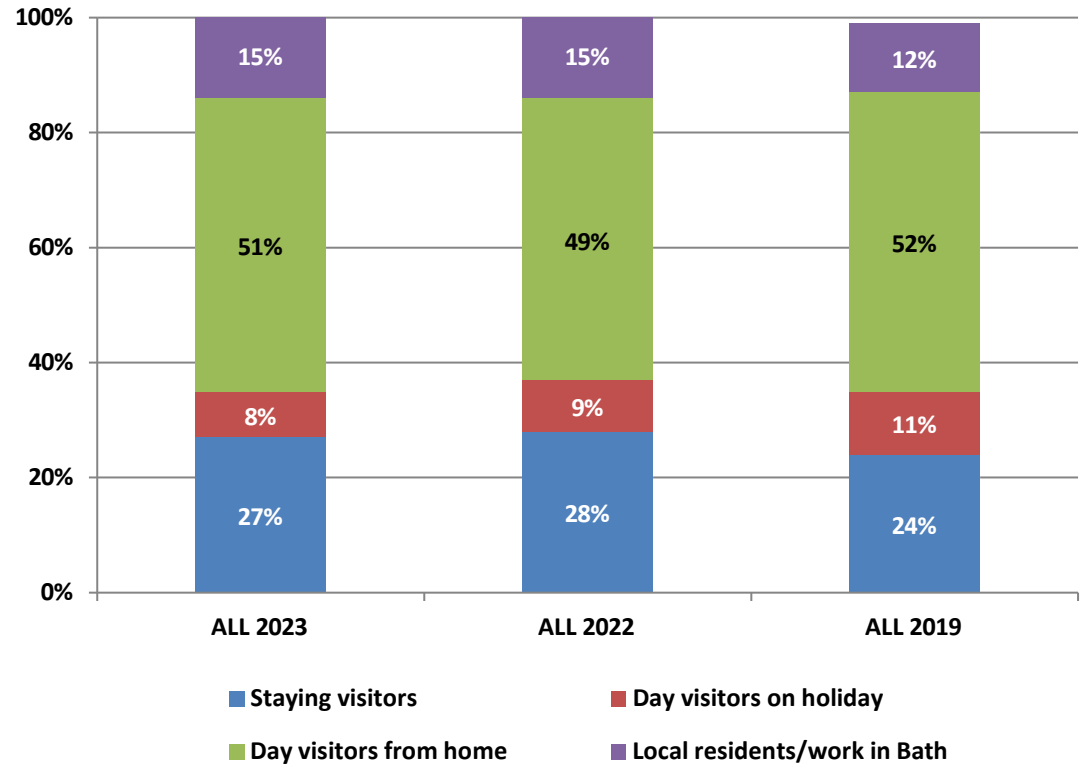
Bath Christmas Market Survey 2023

Visitor Profile



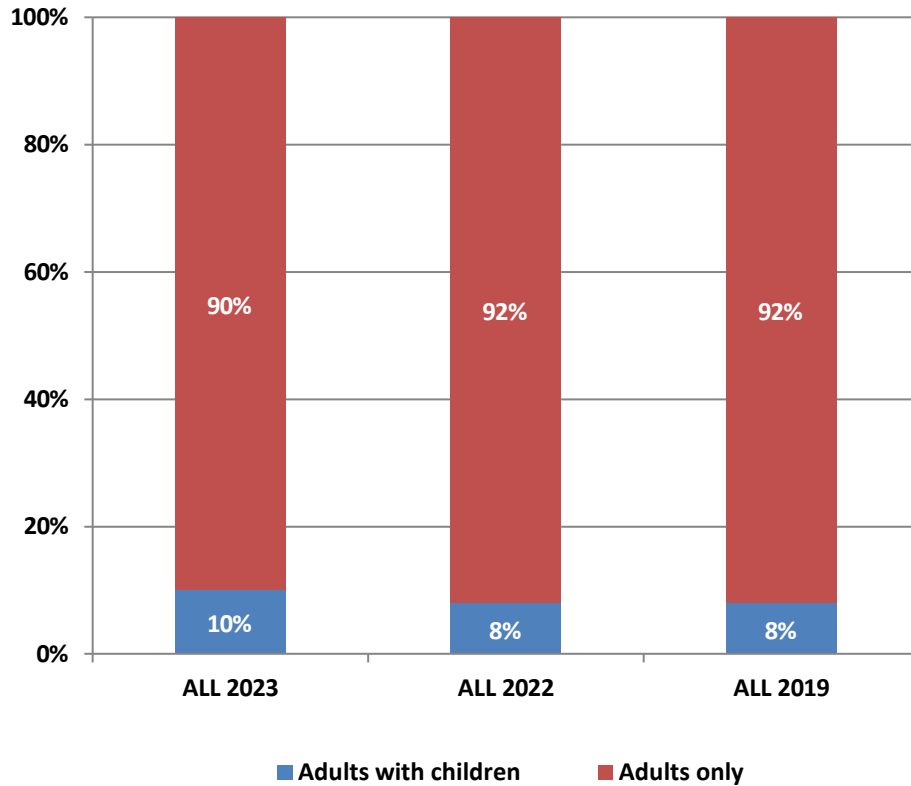
The proportions of residents, day and staying visitors are virtually unchanged compared with 2022.

- The proportions of staying visitors (27%), day visitors (59%) and residents (15%) remained virtually unchanged compared with 2022 (28%, 58% and 15% respectively of staying, day and resident visitors). The proportion of staying visitors (27%) and residents (15%) visiting the market have also increased compared with 2019 (24% and 12% respectively) whilst day visitors have decreased (63% 2019).
- Looking at the analysis segments a higher proportion of first time visitors to the Christmas market were staying overnight in the city, a higher proportion of adults visiting with children were on a day visit from home and a higher proportion of respondents visiting the city for an other reason were local residents/worked in Bath.



Visitor type	ALL 2023	F2F	ONLINE	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Staying visitors	27%	28%	27%	14%	29%	41%	20%	27%	27%
Day visitors on holiday	8%	5%	12%	5%	5%	10%	7%	8%	7%
Day visitors from home	51%	55%	44%	70%	54%	45%	53%	58%	32%
Local residents / work in Bath	15%	12%	18%	12%	13%	5%	20%	7%	34%

Average group size has increased slightly.



- At 10% the proportion of adults with children groups visiting the market increased by 2% compared with both 2022 and 2019 levels (8% each).
- The average group size at 2.45 people (0.15 children and 2.30 adults) has also increased compared with 2.10 people during 2022 and 2.15 people during 2019.

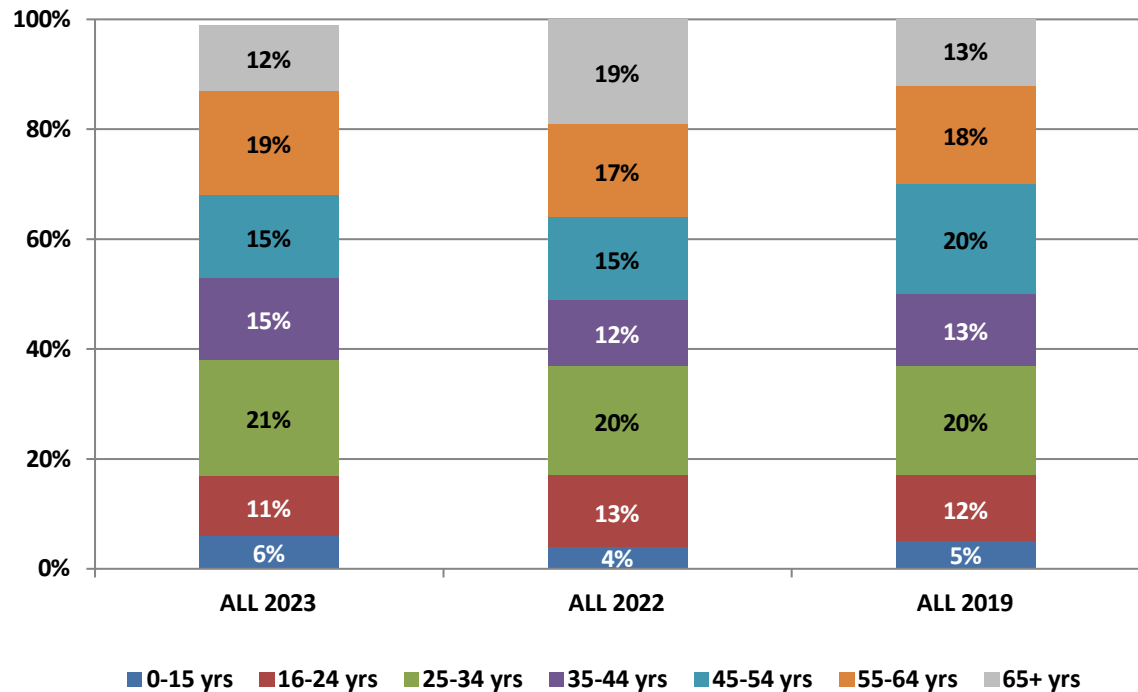
	2023	2022	2019
Ave. children	0.15	0.09	0.11
Ave. adults	2.30	2.01	2.04
Total ave. people	2.45	2.10	2.15

- Looking at the analysis segments only 5% of staying visitors and 8% of those visiting the city for an other reason were visiting with children.

Group composition	ALL 2023	LOCAL	DAY	STAYING	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Adults with children	10%	10%	13%	5%	9%	11%	11%	8%
Adults only	90%	90%	87%	95%	91%	89%	89%	92%

Decrease in visitors aged 65+years.

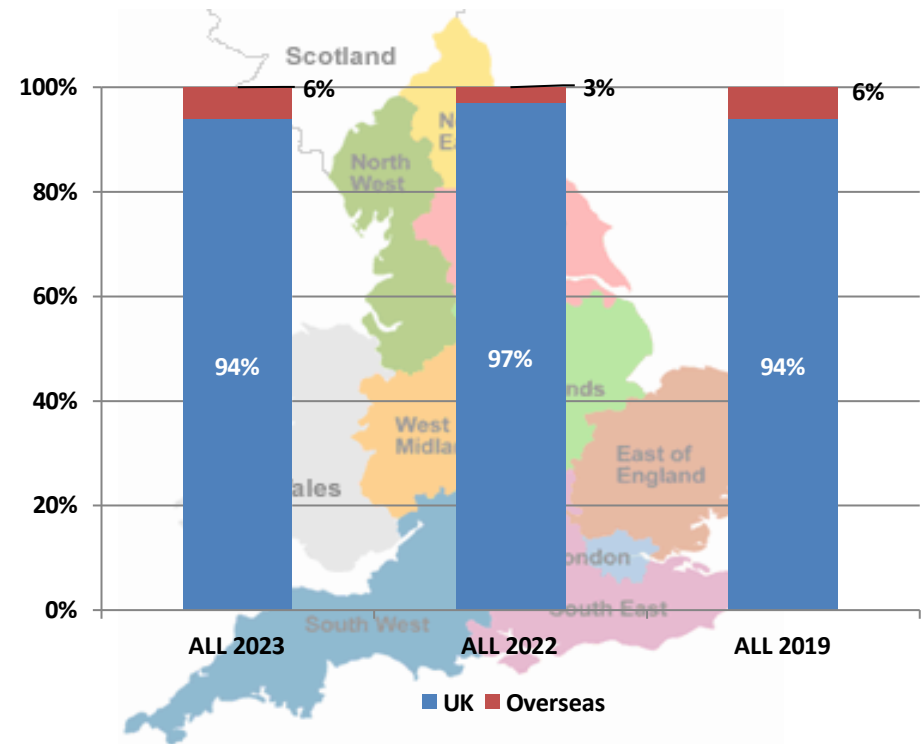
- The only key change in age profile compared to 2022 was a 7% decrease in visitors aged 65+ years (12% 2023 & 19% in 2022).
- All other age groups were similar to 2022 proportions.
- Day and staying visitors showed a similar profile in terms of age and were typically older than local residents.



Age group of people in party / gender	ALL 2023	LOCAL	DAY	STAYING
0-15 years	6%	7%	8%	3%
16-24 years	11%	29%	9%	8%
25-34 years	21%	16%	22%	22%
35-44 years	15%	9%	15%	18%
45-54 years	15%	16%	14%	15%
55-64 years	19%	17%	17%	24%
65+ years	12%	7%	14%	10%
Male	31%	25%	31%	33%
Female	69%	75%	69%	67%

At 6%, the proportion of overseas visitors to the market has returned to pre-pandemic levels.

- 94% of all visitors were from the UK, compared with 97% during 2022 and the same proportion as during 2019. At 6%, the proportion of overseas visitors to the market has doubled compared with 2022 (3%) and returned to pre-pandemic levels (6% 2019).
- 54% of all visitors lived in the South West of England (56% 2022 and 50% 2019) including 18% within the BA postcode area (19% 2022 and 15% 2019). 41% lived elsewhere in the UK (same proportion as 2022 and compared with 45% 2019).
- The postcodes of both UK day and staying visitors during 2023 have been mapped in the slides to follows.



Postcode area	% of all visitors	Postcode area	% of all visitors	Postcode area	% of all visitors	Postcode area	% of all visitors
Bath	18%	Reading	2%	Salisbury	1%	Worcester	1%
Bristol	13%	Dorchester	2%	Torquay	1%	Bromley	1%
Swindon	8%	Tonbridge	2%	Brighton	1%	Ipswich	1%
Cardiff	4%	Oxford	2%	Southampton	1%	Medway	1%
Swansea	4%	Portsmouth	1%	Redhill	1%	London N	1%
Gloucester	3%	Guildford	1%	Belfast	1%	Slough	1%
Newport	3%	Plymouth	1%	Dartford	1%	Other UK (less than 1% each)	11%
Taunton	3%	Exeter	1%	London SE	1%	Overseas	6%
Bournemouth	2%	Hemel Hempstead	1%	Truro	1%		

Day visitors' postcode map.



Staying visitors' postcode map.



Bath Christmas Market Survey 2023



Characteristics of Visits



The duration of stay in Bath was lower than during 2022 and 2019.

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

- At 1.91 nights, the average length of stay amongst those visitors staying overnight in Bath during their visit to the market was lower than during both the 2022 (2.24) and 2019 surveys (2.27 nights).
- Attendance at the market (amongst online survey respondents) was highest during the Friday to Sunday periods with the peak weekend being Friday 1st December to Sunday 3rd December.
- Attendance (amongst online survey respondents) was lowest on Thursday 7th December (7%), Monday 27th November and Wednesday 6th December (8% each).

Days when visited the market (online respondents only)

Thursday 23rd November	13%	Tuesday 28th November	10%	Sunday 3rd December	11%	Friday 8th December	14%
Friday 24th November	13%	Wednesday 29th November	13%	Monday 4th December	9%	Saturday 9th December	17%
Saturday 25th November	16%	Thursday 30th November	14%	Tuesday 5th December	9%	Sunday 10th December	12%
Sunday 26th November	11%	Friday 1st December	13%	Wednesday 6th December	8%	Don't know/can't remember	3%
Monday 27th November	8%	Saturday 2nd December	17%	Thursday 7th December	7%		

20% of day visitors who were on holiday staying outside of the city were staying in nearby Bristol.

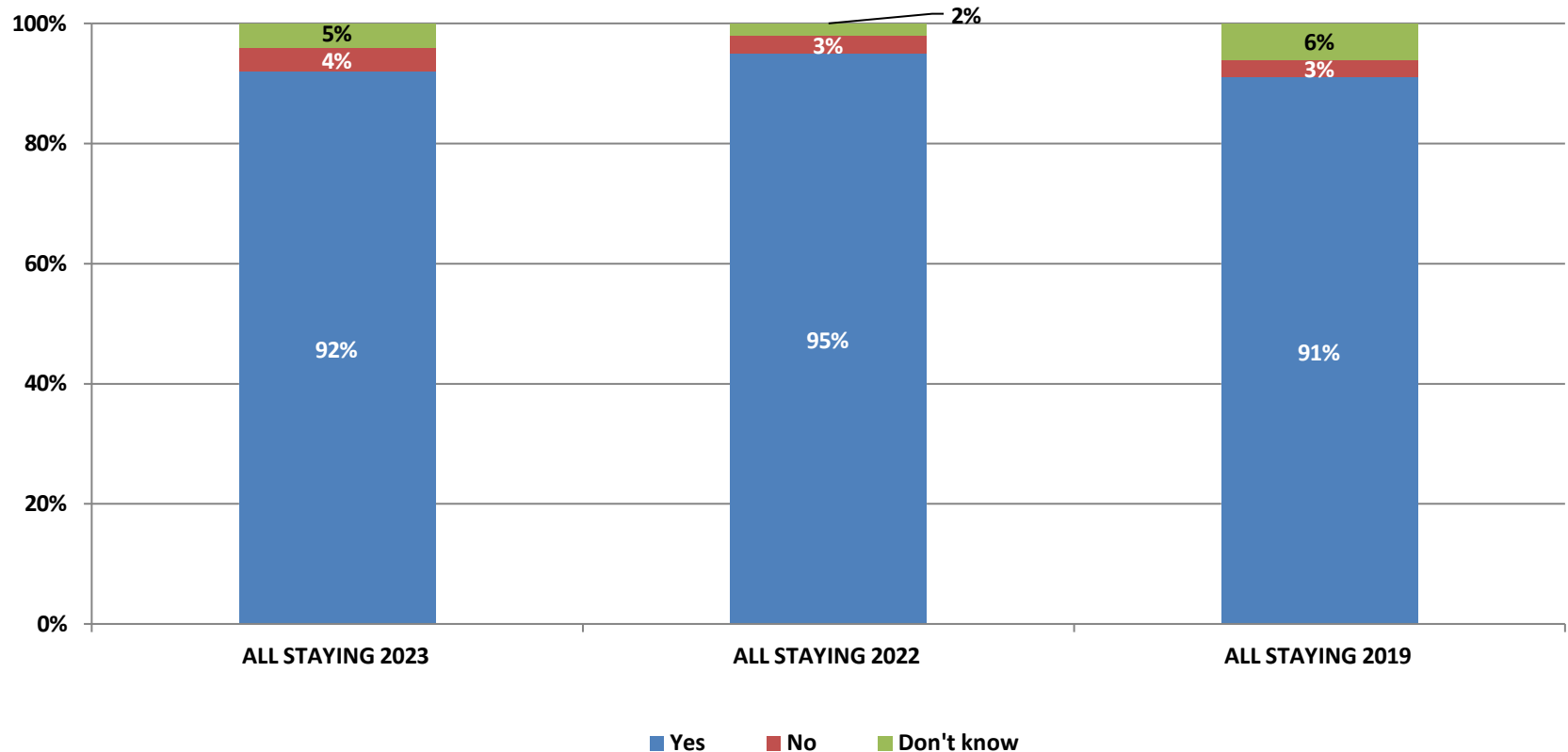
20% of day visitors who were on holiday staying outside of the city were staying in nearby Bristol, the same proportion as during the 2022 survey and compared with 26% during 2019. A further 10% of day visitors on holiday in each case were staying in Bradford On Avon and Keynsham and 6% in each case in Chippenham and Limpley Stoke.

Location	% of all day visitors on holiday	Location	% of all day visitors on holiday
Bristol	20%	Frome	2%
Bradford on Avon	10%	Glastonbury	2%
Keynsham	10%	London	2%
Chippenham	6%	Malmesbury	2%
Limpley Stoke	6%	Midsomer Norton	2%
Corsham	4%	Pensford	2%
Radstock	4%	Saltford	2%
Swindon	4%	Shaftesbury	2%
Badminton	2%	Stroud	2%
Batheaston	2%	Tetbury	2%
Box	2%	Trowbridge	2%
Colerne	2%	Usk	2%
Down hill	2%	Westbury	2%

92% of staying visitors said they would consider returning to Bath for a short break at another time of the year.

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

92% said they would, compared with 95% in 2022 and 91% in 2019. 4% said they wouldn't (3% in each case during 2022 and 2019) and 5% didn't know (2% and 6% respectively during 2022 and 2019).



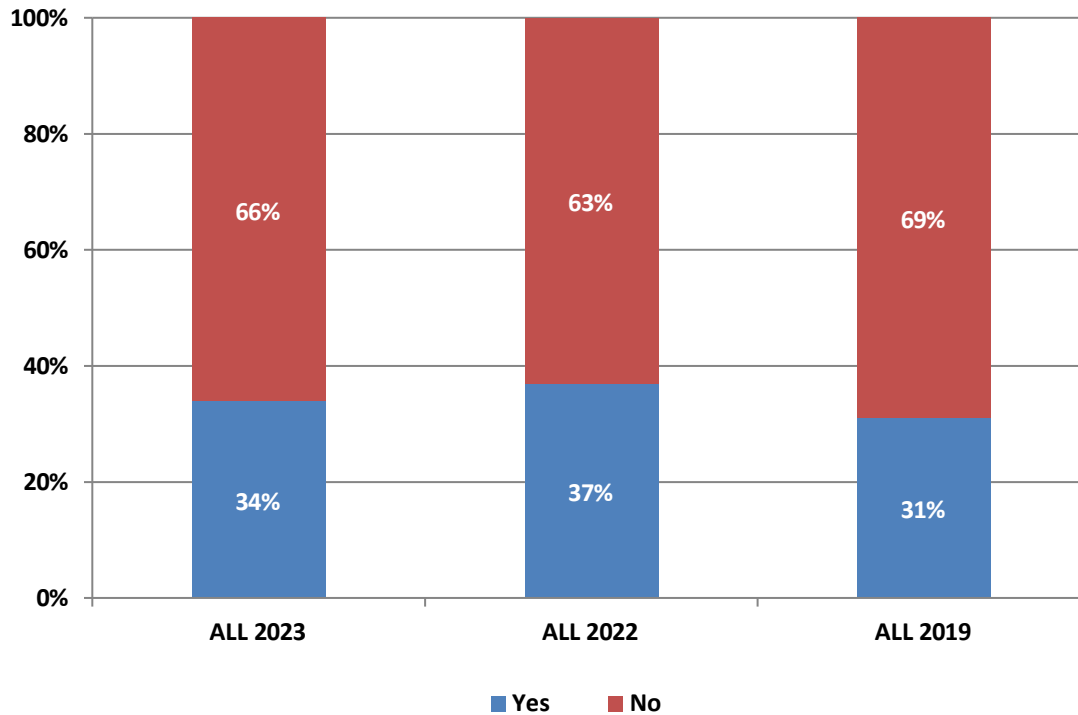
Dwell time at the market remained similar to 2022 but slightly lower than during 2019.

- On average visitors had spent 4.01 hours or 4 hours 1 minute at the Christmas Market during 2023 – just 5 minutes longer than during 2022 (3.93 hours or 3 hours 56 minutes) but around 16 minutes shorter than during 2019 (4.28 hours or 4 hours 17 minutes).
- Staying visitors had typically spent the longest amount of time at the Christmas Market – 4.59 hours or 4 hours and 35 minutes compared with 4.11 hours for day visitors (4 hours and 7 minutes) and 2.54 hours for local residents/workers (2 hours and 32 minutes). Online respondents, first time visitors to the market and those who said the market was the main reason for them visiting Bath had all spent more than 4 hours on site.

Average duration of stay at the market	Decimal	Hours/minutes
ALL 2023	4.01	4 hours 1 minute
ALL 2022	3.93	3 hours 56 minutes
ALL 2019	4.28	4 hours 17 minutes
F2F	3.75	3 hours 45 minutes
ONLINE	4.39	4 hours 23 minutes
LOCAL	2.54	2 hours 32 minutes
DAY	4.11	4 hours 7 minutes
STAYING	4.59	4 hours 35 minutes

Average duration of stay at the market	Decimal	Hours/minutes
ADULTS WITH CHILDREN	3.70	3 hours 42 minutes
ADULTS ONLY	3.77	3 hours 46 minutes
FIRST TIME BCM	4.35	4 hours 21 minutes
REPEAT BCM	3.83	3 hours 50 minutes
MAIN REASON	4.43	4 hours 26 minutes
OTHER REASON	2.91	2 hours 55 minutes

The proportion of first time visitors to the Bath Christmas Market decreased slightly compared with 2022 but remained slightly higher than during 2019.

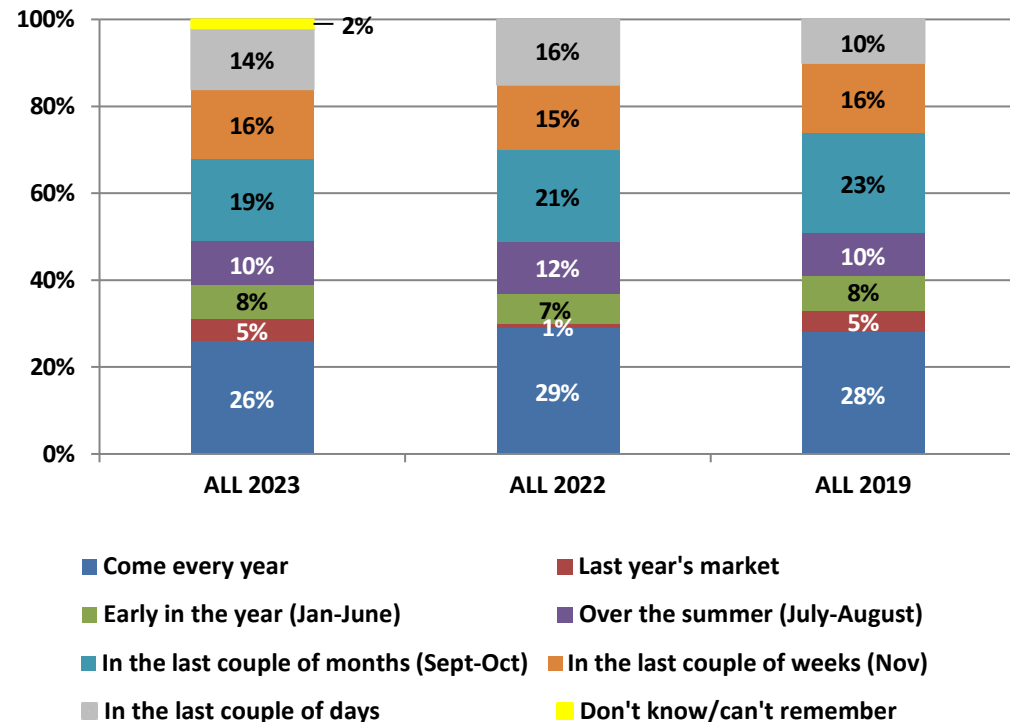


- Survey respondents were asked whether it was the first time they had visited the Bath Christmas Market.
- At 34%, the proportion of first time visitors to the Christmas market decreased by 3% compared with 2022 but remained 3% higher than during 2019.
- 51% of staying visitors and 40% of adult only groups and face to face survey respondents in each case were visiting the Christmas Market for the first time.

Whether first ever visit to Bath Christmas Market (repeat visitors to Bath only)	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	MAIN REASON	OTHER REASON
Yes	34%	40%	27%	11%	32%	51%	35%	40%	36%	32%
No	66%	60%	73%	89%	68%	49%	65%	60%	64%	68%

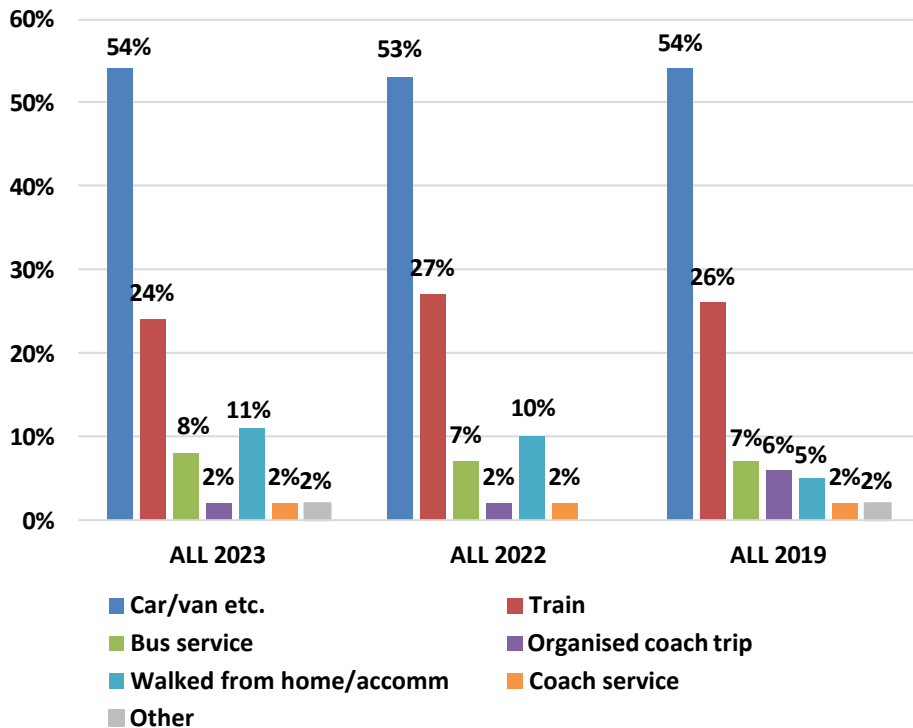
Around half of all visitors make the decision to visit the market within two months of it taking place.

- In a similar manner to 2022 and 2019, approximately half of respondents made the decision to visit the market within two months of it taking place (49%, compared with 52% in 2022 and 49% in 2019) with around a third visiting every year (26%) or deciding at last years' market (5%).
- 66% of face to face survey respondents had made the decision to visit the market within two months of it taking place, along with 60% of day visitors, 39% of staying visitors, 77% of adults visiting with children, 64% of adult only groups, 64% of first time visitors to the market and 50% of those for whom the market was the main reason for visiting Bath.
- Staying visitors (37%), first time visitors to the market (32%) and those for whom the market was their main reason for visiting Bath (20%) were the most likely to have planned their visit to the market further in advance (either over the summer or earlier in 2023).



When decided to visit the market	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Come every year	26%	15%	42%	60%	21%	18%	9%	15%	2%	39%	23%	35%
In the last couple of months (Sept-Oct)	19%	22%	15%	4%	19%	27%	19%	22%	27%	15%	21%	14%
In the last couple of weeks (Nov)	16%	25%	4%	6%	24%	7%	14%	26%	21%	14%	18%	11%
In the last couple of days	14%	19%	6%	14%	17%	5%	44%	16%	16%	12%	11%	20%
Over the summer (July-August)	10%	10%	10%	2%	6%	22%	5%	11%	18%	6%	11%	8%
Early in the year (Jan-June)	8%	5%	12%	3%	6%	15%	2%	6%	14%	5%	9%	5%
Last year's market	5%	5%	5%	5%	5%	4%	7%	5%	-	7%	6%	2%

Road transport (car, van, bus or coach) accounted for 64% of visits.

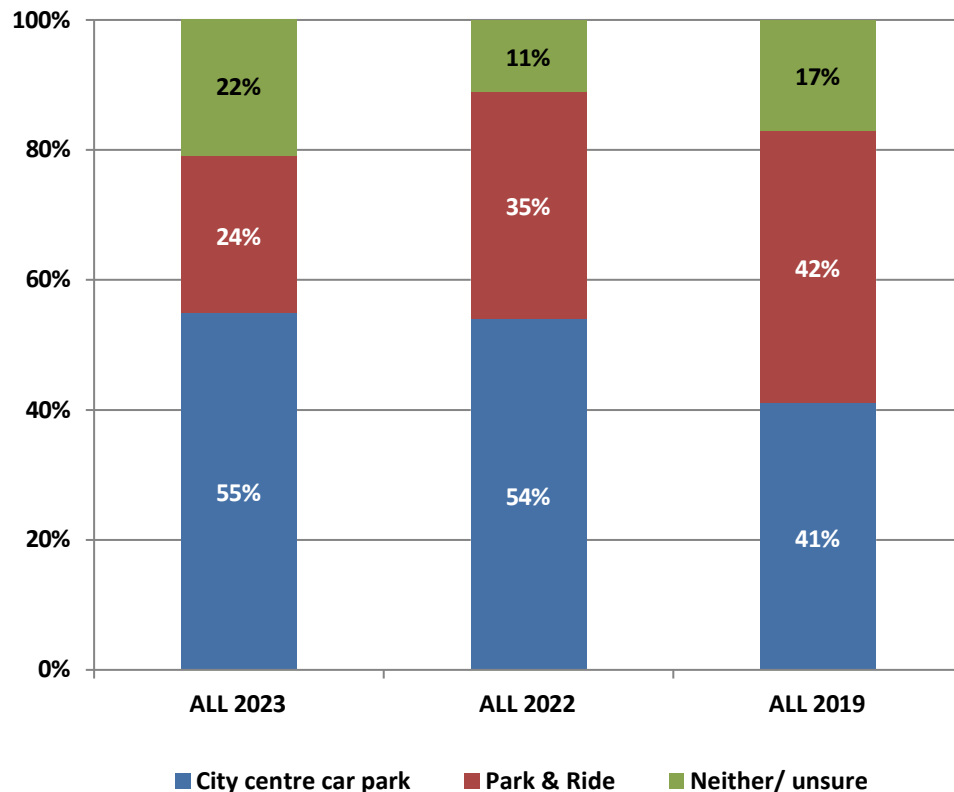


- Car/van etc. (54%) was once again the most popular form of transport used to travel to Bath – a similar proportion to both 2022 and 2019.
- A further 10% of visitors also travelled by road either on a bus (8%) or as part of an organised coach tour or coach service (2% each), again, similar proportions to both 2022 and 2019.
- Around a quarter of visitors had travelled to Bath on the train (24%), compared with 27% during 2022 and 26% during 2019.
- A higher proportion of staying visitors (60%) and adults with children (67%) had travelled to the city by car, van etc. 28% of day visitors, 29% of adult only groups and 27% of first time visitors to the market had arrived in the city by train whilst almost half (47%) of local residents had walked from their own homes.

How travelled to Bath	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Car/van etc	54%	51%	58%	31%	57%	60%	67%	50%	54%	54%	59%	40%
Train	24%	28%	20%	14%	28%	22%	21%	29%	27%	23%	27%	19%
Walked from accommodation / home	11%	10%	12%	47%	1%	14%	5%	10%	9%	12%	4%	30%
Bus service	8%	7%	8%	17%	8%	3%	7%	7%	5%	9%	6%	12%
Organised coach trip	2%	2%	3%	-	4%	1%	-	2%	3%	2%	2%	2%
Coach service	2%	3%	1%	-	3%	1%	2%	3%	3%	2%	2%	1%
Other	2%	1%	3%	1%	2%	2%	-	1%	2%	2%	2%	2%
Bicycle	0%	-	0%	1%	-	-	-	-	-	0%	-	0%

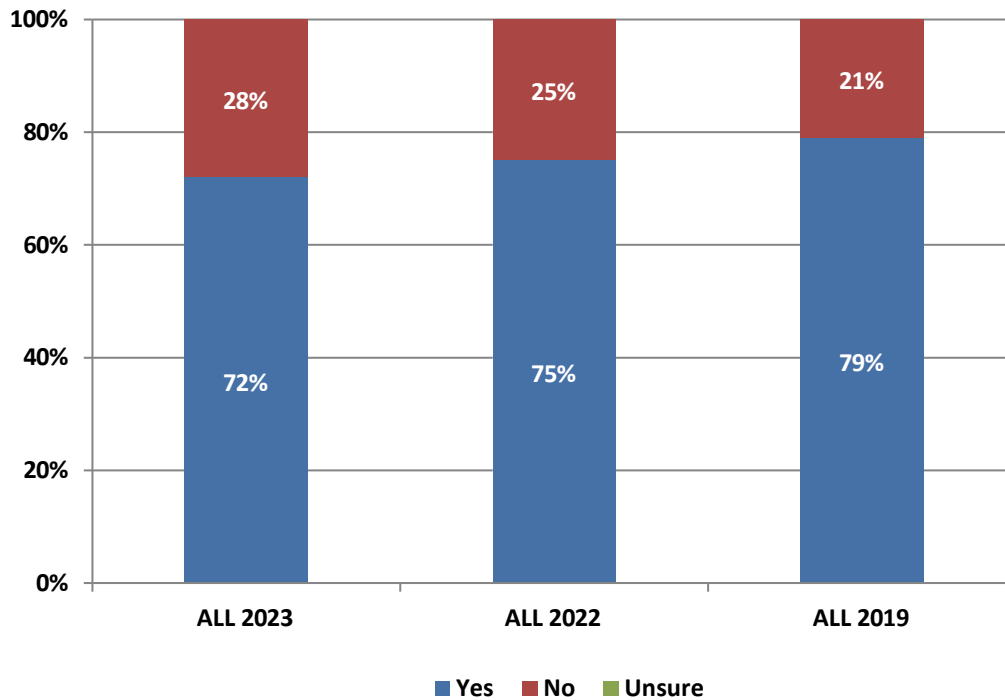
Decrease in park and ride usage amongst market visitors in 2023.

- 55% of respondents who had arrived in the city by car/van etc. had used a city centre car park – a similar proportion to 2022 (54%) and an increase of 14% compared with 2019 (41%). 24% had used the city’s park & ride facility – a decrease of 11% compared with 2022 (35%) and a decrease of 18% compared with 2019 (42%).
- Double the proportion of 2023 visitors said they hadn’t used either a city centre car park or the park and ride or were unsure where they had parked compared with the proportion saying the same in 2022 (11%) and compared with 17% during 2019.
- 76% of adults with children had used a city centre car park. Only 12% of local residents, 8% of staying visitors and 14% of adults with children had used the park and ride facility. 40% of staying visitors said they hadn’t used either a city centre car park or the park and ride or were unsure where they had parked.



Car/van users etc. Which of the following was used....	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
City centre car park	55%	53%	58%	58%	56%	52%	76%	49%	50%	57%	55%	52%
Park & Ride	24%	32%	12%	12%	33%	8%	14%	36%	25%	23%	23%	24%
Neither/ unsure	22%	15%	30%	30%	11%	40%	10%	15%	25%	20%	21%	23%

The market continues to be the main draw for around three quarters of visitors.

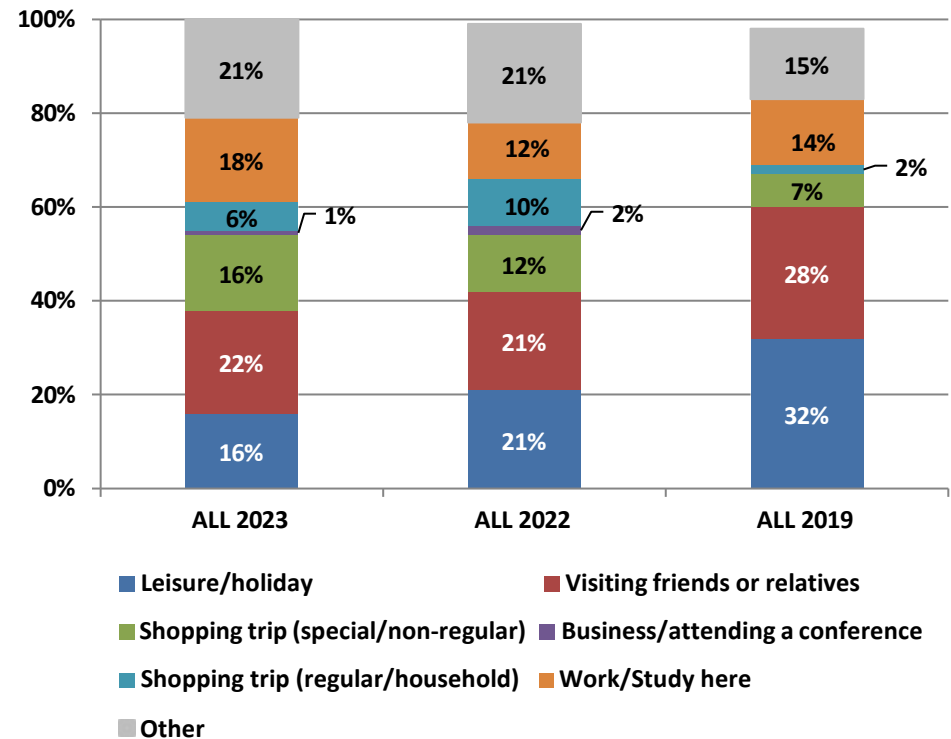


- 72% of visitors indicated that the Christmas Market was their main reason for visiting the city, a similar proportion to 2022 but 7% lower than during 2019 (79%).
- 81% of day visitors to the city, 79% of adults with children and 74% of first time visitors to the market said it was their main reason for choosing to visit.
- 34% of local residents said the market was their main reason for choosing to visit Bath.

Whether market was main reason for visiting Bath	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM
Yes	72%	71%	73%	34%	81%	72%	79%	71%	74%	71%
No	28%	29%	27%	66%	19%	28%	21%	29%	29%	-

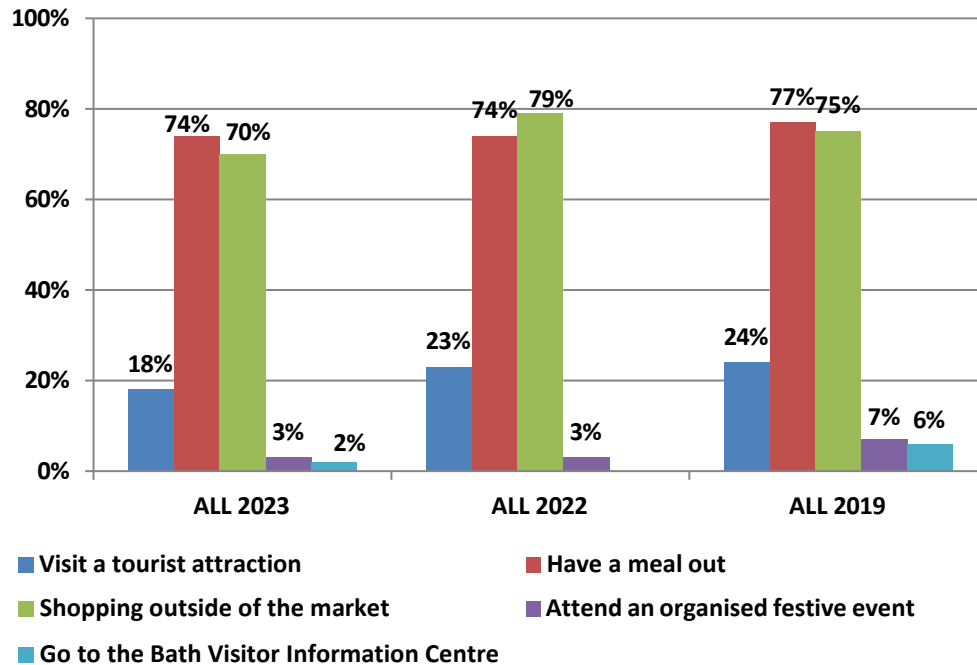
Visiting friends/relatives remains the main motivator for those not visiting because of the market.

- 22% of respondents whose main reason for visiting Bath was not because of market said they were visiting friends or relatives who lived in the city (21% and 28% respectively during 2022 and 2019). 18% said they worked or studied in the city (12% during 2022 and 14% during 2019).
- 16% of all respondents in each case said they were on a leisure/holiday trip or that they were on a special shopping trip (21% and 12% respectively during 2022 and 32% and 7% respectively during 2019) and 6% a regular/household shopping trip (10% during 2022 and 2% during 2019). 1% were on business/attending a conference in the city (2% during 2022).
- 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 (21% 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 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM
Visiting friends or relatives	22%	29%	12%	5%	31%	31%	38%	30%	27%	20%
Other	21%	16%	28%	26%	17%	20%	13%	17%	27%	18%
Work/Study here	18%	12%	27%	43%	8%	4%	-	11%	8%	23%
Leisure/holiday	16%	23%	6%	5%	10%	38%	13%	24%	31%	9%
Shopping trip (Special/Non-regular)	16%	19%	11%	12%	26%	5%	38%	17%	6%	20%
Shopping trip (regular/ household)	6%	-	14%	9%	6%	-	-	-	-	8%
Business/attending a conference	1%	1%	1%	-	1%	2%	-	1%	2%	1%

74% of market visitors had/or were planning to have a meal out in Bath and 70% had/or were planning to do other shopping outside of the market.



- 74% of respondents indicated that they had/or were planning to have a meal out in Bath (74% and 77% respectively during 2022 and 2019) and 70% had/or were planning to do other shopping in Bath outside of the market (79% in 2022 and 75% in 2019).
- 18% had/or were planning to visit a tourist attraction in the city (23% and 24% respectively during 2022 and 2019).
- 3% had/or were planning to attend an organised festive event in the city (same proportion as during 2022 and compared with 7% during 2019) including a carol service/service in the Abbey, going to the theatre and ice skating.
- The results by segment are shown below.

Whether likely to do any of the following during visit....	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Have a meal out	74%	79%	67%	55%	73%	87%	84%	79%	81%	71%	78%	66%
Shopping outside of the market	70%	71%	69%	72%	69%	73%	56%	73%	65%	73%	69%	72%
Visit a tourist attraction	18%	18%	18%	9%	9%	41%	7%	18%	27%	12%	16%	22%
Attend an organised festive event	3%	2%	4%	3%	2%	6%	-	3%	3%	3%	3%	3%
Go to the Bath Visitor Information Centre	2%	3%	1%	1%	2%	4%	-	3%	4%	1%	2%	2%

Bath Christmas Market Survey 2023

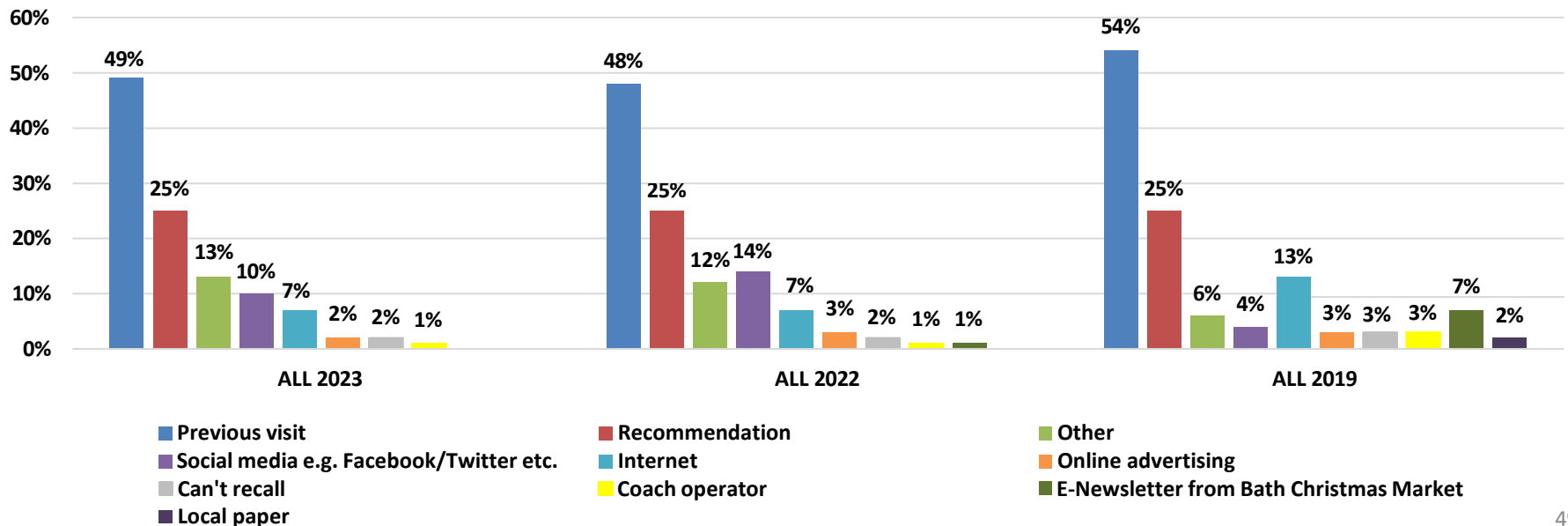
Advertising & Marketing



Little change in what prompted people to visit the market in 2023 compared with 2022.

For around half it was as the result of previous visit.

- 49% of visitors were prompted to visit the market from a previous visit (48% in 2022 and 54% in 2019), whilst a further 25% had been recommended to visit it (same proportion as 2022 and 2019).
- 10% were prompted to visit via a social media site such as Facebook, Twitter or Instagram etc. – a slight decrease of 4% compared with 2022 but remaining 6% higher than during 2019 (4%). 7% were prompted to visit via the internet (same proportion as 2022 and compared with 13% 2019), 2% via online advertising (3% in each case during 2022 and 2019) and 1% by a coach operator (1% and 3% respectively during 2022 and 2019).
- 13% 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 2023 results by analysis segment is shown in the table overleaf.

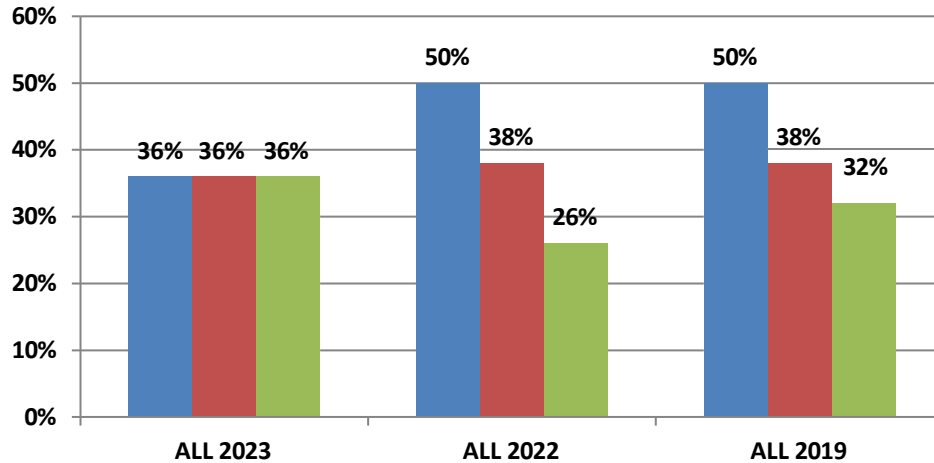


16% of all first time visitors to the market in each case were prompted to visit the market as the result of seeing it advertised on social media or on the internet.

- With the exception of first time visitors to the Christmas market, the largest proportion of respondents across all analysis segments had been prompted to visit the market in 2023 as the result of a previous visit. The largest proportion of first time visitors (47%) had been recommended to visit it.
- 16% of first time visitors to the market and 11% of staying visitors had been prompted to visit as the result of a social media site such as Facebook, Twitter, Instagram etc. 16% of first time visitors to the market and 12% of staying visitors had been prompted to visit as the result of the internet.

What prompted you to visit Bath Christmas Market?	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Previous visit	49%	46%	54%	59%	52%	39%	58%	45%	5%	72%	52%	41%
Recommendation	25%	33%	14%	10%	26%	31%	30%	34%	47%	14%	27%	20%
Other	13%	15%	9%	12%	12%	15%	19%	15%	20%	8%	10%	19%
Social media e.g. Facebook/Twitter/Instagram etc.	10%	7%	16%	9%	11%	11%	2%	7%	16%	7%	12%	7%
Internet	7%	7%	7%	4%	5%	12%	7%	6%	16%	2%	6%	9%
None of these	4%	-	10%	13%	4%	-	-	-	1%	6%	2%	9%
Online advertising	2%	1%	4%	2%	2%	2%	-	1%	3%	1%	2%	1%
Can't recall	2%	2%	3%	5%	1%	3%	-	2%	3%	1%	1%	4%
Coach operator	1%	1%	0%	-	1%	1%	-	2%	2%	0%	1%	1%
Local paper	0%	0%	0%	-	0%	1%	-	1%	0%	0%	1%	-
E-Newsletter	0%	-	1%	1%	0%	-	-	-	-	0%	-	1%
Radio or podcast promotion	0%	-	0%	-	0%	-	-	-	0%	-	0%	-

The primary usage of the internet was information sourcing.



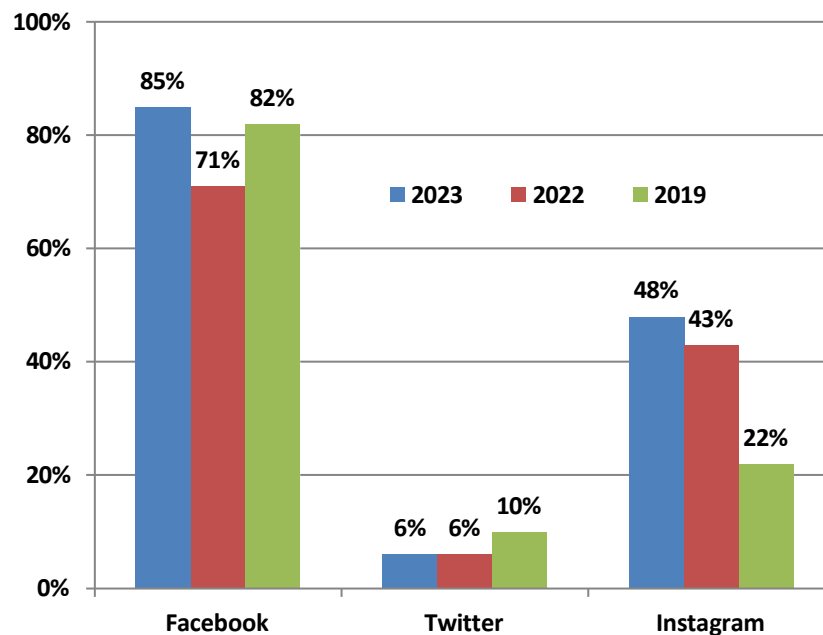
- Information sourcing about Bath Christmas Market ONLY
- Information sourcing about Bath Christmas Market AND to book accommodation/car hire/flights/attraction tickets etc.
- Searching for Christmas shopping ideas generally

- There was a significant decrease during 2023 in the proportion of visitors using the internet to search for information about Bath Christmas Market only (36%) compared with both the 2022 and 2019 surveys (50% in each case). The same proportion, 36%, had used it to source information and to book their accommodation etc. online and this remained similar to both 2022 and 2019 (38% in each case).
- 36% had used the internet to search for Christmas shopping ideas generally, a 10% increase compared with 2022 (26%) and compared with 32% during 2019.
- 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. (50%), along with adult only groups (50%), first time visitors to the market(42%) and those visiting for another reason (47%).

What did you use the internet for?	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Information sourcing about Bath Christmas Market ONLY	36%	24%	56%	100%	42%	21%	67%	21%	34%	44%	39%	32%
Information sourcing about Bath Christmas Market AND to book accommodation/car hire/flights/attraction tickets etc.	36%	45%	22%	-	26%	50%	-	50%	42%	11%	29%	47%
Searching for Christmas shopping ideas generally	36%	31%	44%	-	47%	33%	33%	29%	34%	44%	46%	21%

Increase in visitors following the market on Facebook and Instagram compared with 2022.

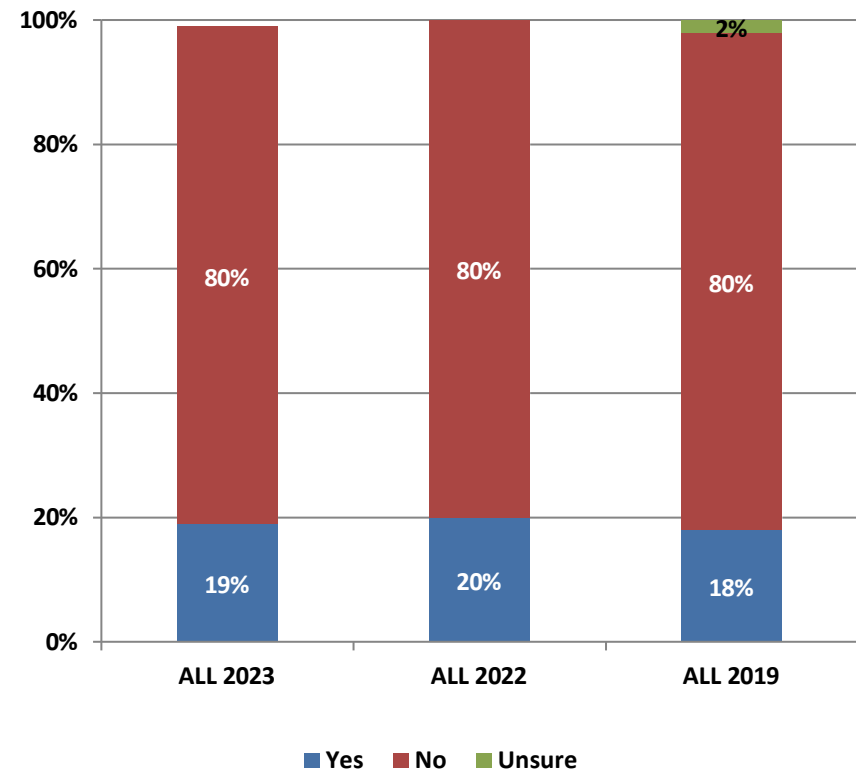
- Respondents were asked whether they were following the Bath Christmas Market on social media sites Facebook, Twitter and Instagram.
- 85% said they had been following the market on Facebook, a significant increase compared with the 71% doing so in 2022 and returning to a similar level as during 2019 (82%). 48% were doing the same on Instagram, an increase of 5% compared with 2022 (43%) and more than double the proportion who were doing so during 2019 (22%). 6% were following the market on Twitter, the same proportion as during 2022 and compared with 10% during 2019.
- 56% of local residents, 52% of day visitors and 71% of adults with children were following the Christmas Market on Instagram.



Whether following Bath Christmas Market on any of the following social media sites....	ALL 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Facebook	85%	60%	97%	84%	85%	86%	43%	63%	76%	89%	85%	85%
Twitter	6%	3%	7%	8%	7%	2%	-	4%	2%	7%	5%	8%
Instagram	48%	46%	48%	56%	52%	36%	71%	43%	46%	48%	48%	48%

The marketing/promotion seen continues to influence a 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.
- 19% said they had been influenced to visit by the marketing/promotional materials they had seen compared with 20% and 18% respectively during 2022 and 2019. 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. When these respondents are excluded from the analysis the level of influence of the marketing/promotional materials seen increases to 34% (38% 2022).
- 48% of online survey respondents said they had 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 2023	F2F	ONLINE	LOCAL	DAY	STAYING	ADULTS WITH CHILDREN	ADULTS ONLY	FIRST TIME BCM	REPEAT BCM	MAIN REASON	OTHER REASON
Yes	19%	14%	48%	6%	20%	24%	12%	14%	26%	14%	22%	13%
No	80%	86%	52%	94%	80%	75%	88%	86%	73%	86%	78%	87%
Don't know	0%	0%	-	-	-	1%	-	0%	0%	-	0%	-

Bath Christmas Market Survey 2023

Visitor Expenditure



Average visitor spending at the market decreased slightly during 2023 to £26.83.

- Average visitor spend per person per day at the Bath Christmas Market 2023 was £26.83, compared with £30.15 during 2022 and £23.77 in 2019.
- In addition, visitors spent an average of £26.16 on shopping elsewhere in the city, £23.82 on eating and drinking, £3.86 on entertainment and £9.36 on travel and transport, all decreases compared with 2022 with the exception of travel and transport spend.
- Staying visitors spent an average of £70.90 per person per night on accommodation in Bath, compared with £69.23 during 2022 and £67.17 during 2019.

VISITOR SPEND BY CATEGORY 2019-2023 (£/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 2023	£26.83	£26.16	£23.82	£3.86	£9.36	70.90
LOCAL	£17.80	£31.30	£11.50	£1.14	£4.09	
DAY	£25.56	£22.19	£17.10	£1.42	£8.42	
STAYING	£32.67	£32.84	£44.06	£10.29	£13.22	70.90
ALL 2022	£30.15	£31.04	£24.42	£9.35	£6.53	£67.23
ALL 2019	£23.77	£21.42	£16.79	£1.61	£0.96	£69.17

Bath Christmas Market Survey 2023

Visitors' Opinions, Likes & Dislikes



Introduction

The 2023 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:

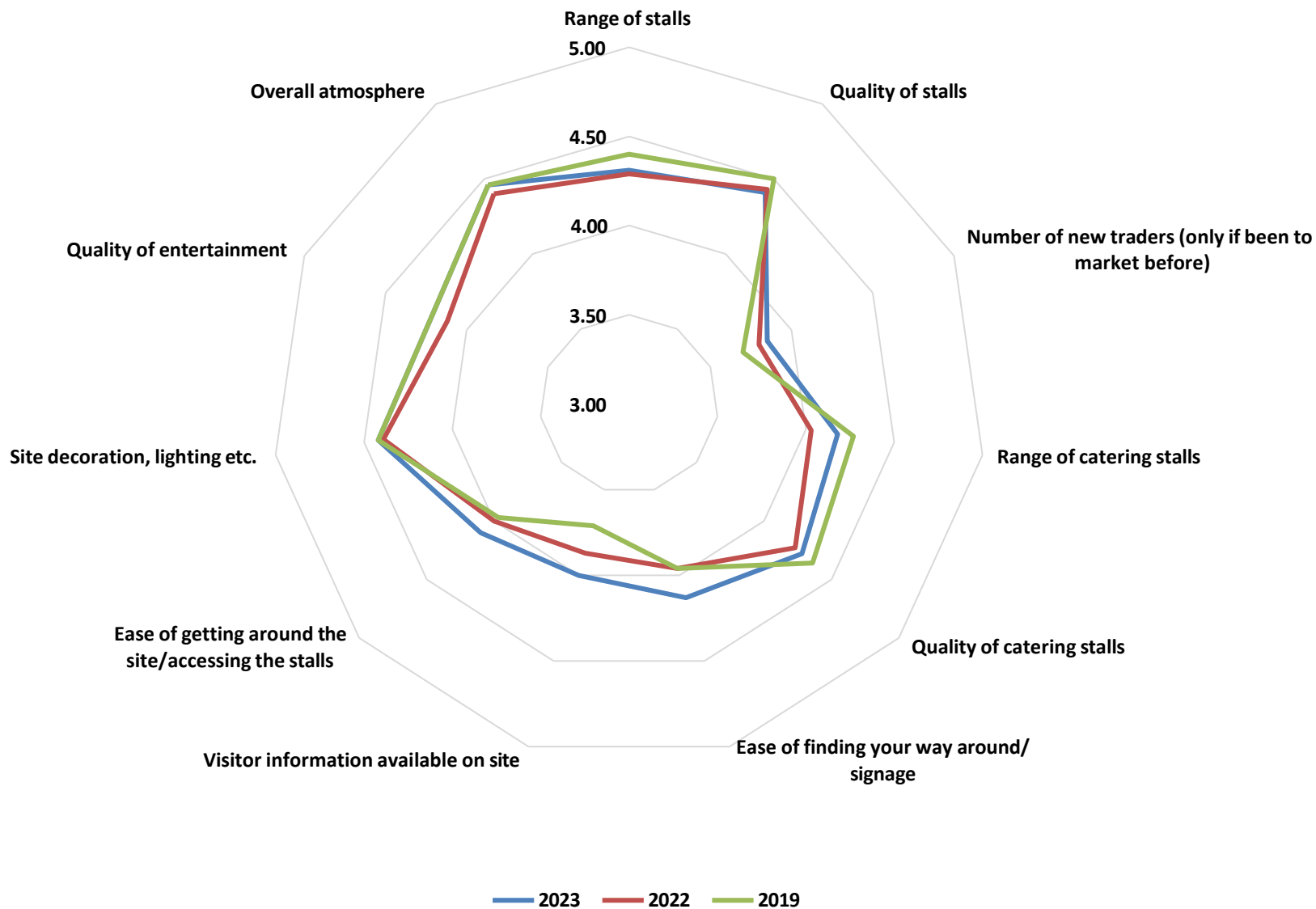
- ✓ **Range of stalls**
- ✓ **Quality of stalls**
- ✓ **Number of new traders (if been to market before)**
- ✓ **Range of catering facilities**
- ✓ **Quality of catering facilities**
- ✓ **Ease of finding your way around/signage**
- ✓ **Visitor information available on site**
- ✓ **Ease of getting around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

With the exception of the quality of the stalls (where satisfaction still remained very high), visitor satisfaction levels increased across the board during the 2023 market.

- With the exception of the quality of the stalls (where satisfaction still remained very high), visitor satisfaction levels with their Bath Christmas Market experience increased across the board compared with the 2022 market. Satisfaction levels were also higher than during the 2019 market for almost all aspects other than the range and quality of stalls and the range and quality of the catering facilities.
- The highest average scores were for the overall atmosphere (4.46), the site decoration, lighting etc. (4.42) and the quality of stalls (4.41) and 10 of the 11 indicators explored by the survey received an average score of 4.00 or more.
- Just 1 indicator, the number of new traders, received an average score of less than 4.00 (3.85).

	Visitor Satisfaction levels 2019 - 2023	2023	2022	2019
1	Range of stalls	4.31	4.29	4.40
2	Quality of stalls	4.41	4.43	4.50
3	Number of new traders (if been before)	3.85	3.80	3.70
4	Range of catering facilities	4.18	4.03	4.27
5	Quality of catering facilities	4.28	4.23	4.36
6	Ease of finding your way around/signage	4.13	3.96	3.96
7	Visitor information available on site	4.00	3.87	3.71
8	Ease of getting around the site/accessing the stalls	4.10	4.00	3.97
9	Site decoration, lighting etc.	4.42	4.39	4.42
10	Quality of entertainment	4.21	4.12	4.21
11	Overall atmosphere	4.46	4.40	4.46

The highest average score was for the overall atmosphere and the lowest score was for the number of new traders.



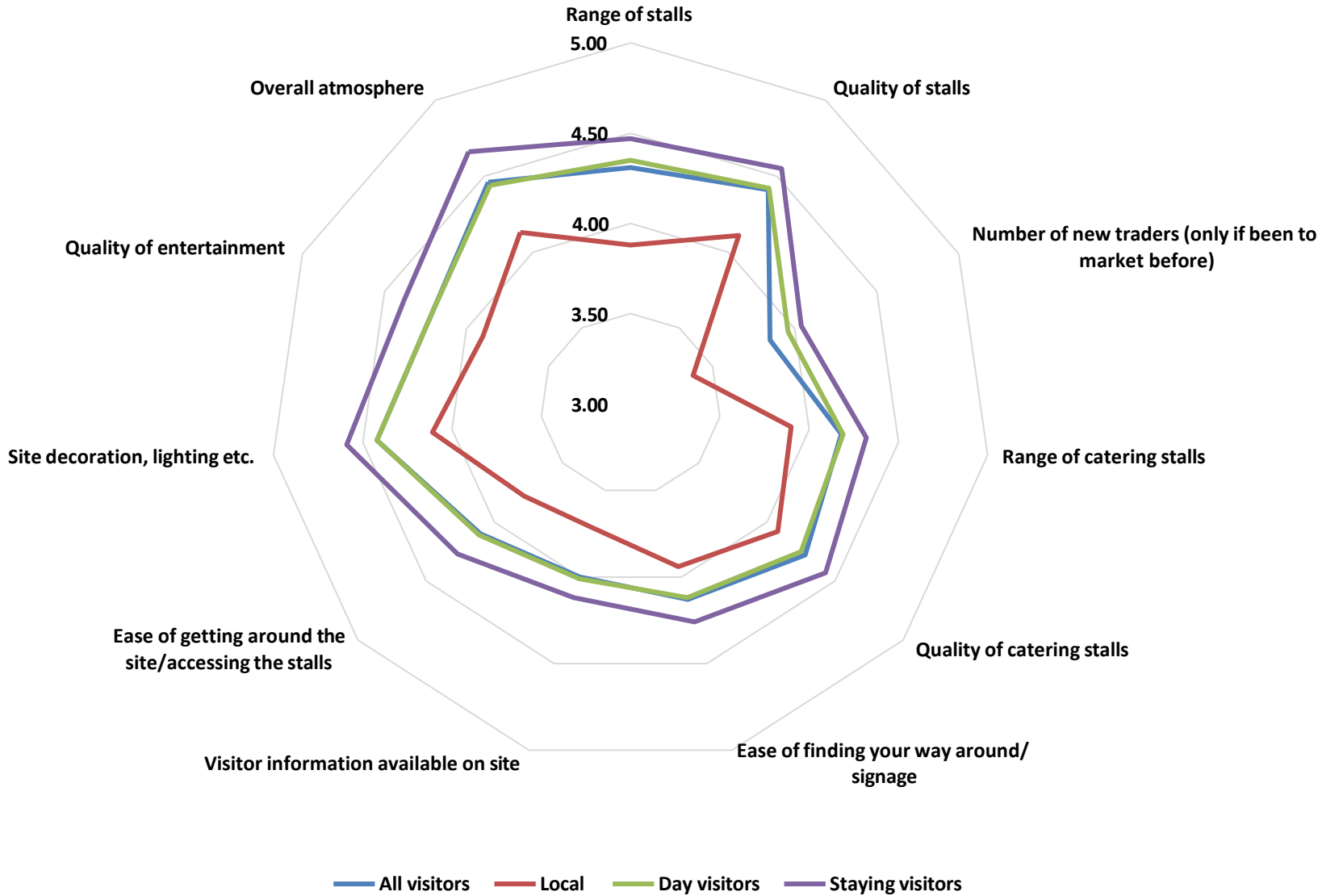
10 of the 11 indicators received an average score of 4.00 or more.

Visitor Satisfaction levels 2023	Mean Score	Very poor	Poor	Average	Good	Very good	Don't know
Overall atmosphere	4.46	1%	2%	7%	31%	59%	1%
Site decoration, lighting etc.	4.42	1%	2%	8%	33%	56%	0%
Quality of stalls	4.41	1%	1%	7%	37%	53%	1%
Range of stalls	4.31	1%	2%	12%	37%	49%	0%
Quality of catering stalls	4.28	0%	1%	11%	36%	39%	12%
Quality of entertainment	4.21	1%	3%	13%	35%	41%	8%
Range of catering stalls	4.18	1%	4%	14%	37%	41%	5%
Ease of finding your way around/ signage	4.13	2%	6%	13%	34%	43%	3%
Ease of getting around the site/accessing the stalls	4.10	3%	6%	11%	35%	43%	1%
Visitor information available on site	4.00	2%	7%	11%	28%	29%	24%
Number of new traders (only if been to market before)	3.85	3%	6%	17%	28%	27%	19%

Satisfaction levels were highest across the board amongst staying visitors.

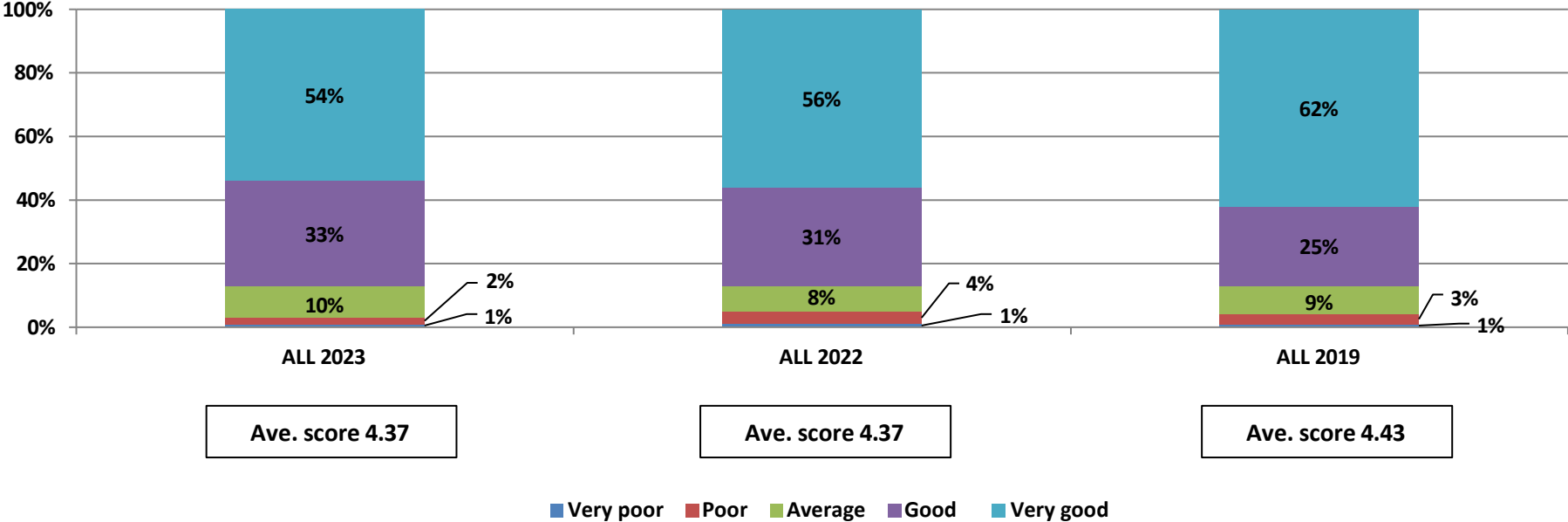
	Satisfaction indicator	ALL	LOCAL	DAY	STAYING
1	Range of stalls	4.31	3.88	4.35	4.47
2	Quality of stalls	4.41	4.11	4.42	4.55
3	Number of new traders (if been before)	3.85	3.38	3.96	4.04
4	Range of catering facilities	4.18	3.90	4.19	4.32
5	Quality of catering facilities	4.28	4.08	4.25	4.43
6	Ease of finding your way around/signage	4.13	3.94	4.12	4.26
7	Visitor information available on site	4.00	3.72	4.01	4.12
8	Ease of getting around the site/accessing the stalls	4.10	3.78	4.11	4.27
9	Site decoration, lighting etc.	4.42	4.11	4.42	4.59
10	Quality of entertainment	4.21	3.90	4.21	4.38
11	Overall atmosphere	4.46	4.13	4.44	4.66

Residents' satisfaction levels were lower than day or staying visitors for all indicators.



At 4.37 out of 5.00, the overall rating of the 2023 market remained very high and unchanged compared with 2022.

- At 4.37 out of 5.00, visitors' overall rating of Bath Christmas Market remained very high and at the same level as during 2022 and slightly lower than during 2019 (4.43).
- Staying visitors had the highest overall opinion of the market (4.58) and local residents the lowest (4.37).
- 54% of visitors rated the market overall as 'very good' and a further 33% as 'good' (56% and 31% respectively during 2022). Just 3% of visitors rated the market as 'poor' (2%) or 'very poor' (1%), a 2% decrease compared with 2022. (5%).

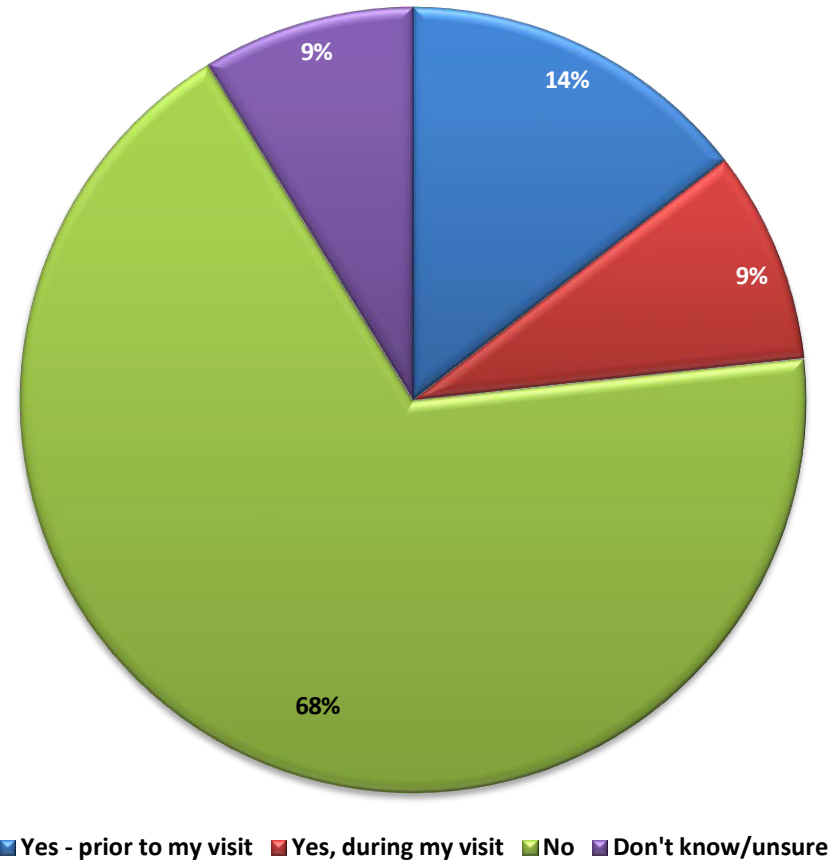


Overall opinion of Bath Christmas Market	ALL 2023	LOCAL	DAY	STAYING
Satisfaction score	4.37	3.95	4.38	4.58

7% of 2023 market visitors had accessibility needs.

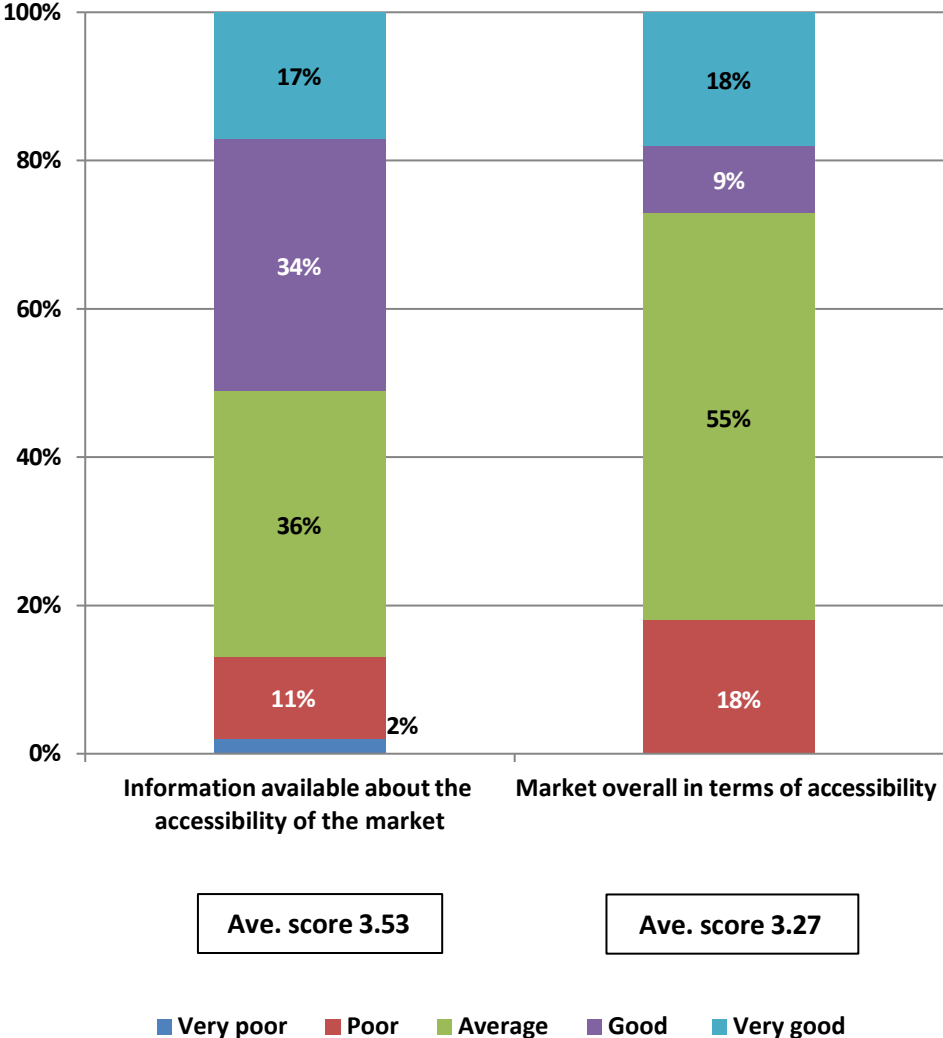
68% of these visitors had not visited the accessibility section on the Bath Christmas Market website prior to and/or during their visit.

- For the first time during the 2023 market, visitors were asked if they, or anyone in their party, had any accessibility needs. 7% of visitors said they did.
- These respondents were asked if they had visited the accessibility section on the Bath Christmas Market website prior to and/or during their visit.
- The majority of visitors to the market with accessibility needs said they have not visited the accessibility section on the Bath Christmas Market website prior to and/or during their visit (68%). 14% said they had visited it prior to their visit and 9% had done so during their visit. 9% didn't know/were unsure.



Visitors' satisfaction levels with both of the accessibility indicators were considerably lower than the other satisfaction scores explored by the survey.

- These respondents were also to rate their satisfaction with the information available about the accessibility of the market (those visiting the accessibility section on the website only) and the market overall in terms of accessibility (all those with accessibility needs).
- Satisfaction levels with the information available about the accessibility of the market (3.53) and the market overall in terms of accessibility (3.27) were considerably lower than the satisfaction scores for all other indicators explored about the market.
- 13% of respondents rated the information available about the accessibility of the market as 'very poor' (2%) or 'poor' (11%) whilst 18% rated the market overall in terms of accessibility as 'poor' suggesting room for improvement in this area in the future.
- These respondents were also asked if there was anything which could have been done to make the market more accessible for them. Some respondents mentioned the need for better signage, more toilets and seating and fewer crowds and to see the full list of responses please refer to the appendix which accompanies this report.



Likelihood of recommending Bath Christmas Market.

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.*

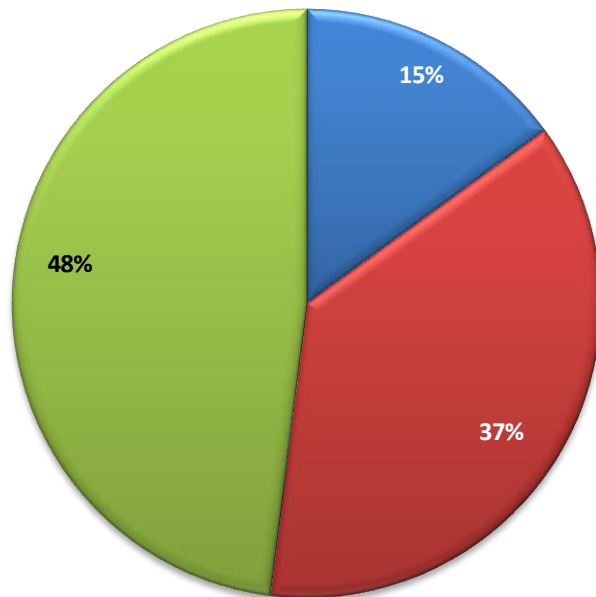
The Recommendation Score is created by calculating what percentage of the customer base are Promoters and then subtracting the percentage who are Detractors.

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

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

The Bath Christmas Market achieved a good recommendation score of +33%, although it decreased compared with 2022.

- The 2023 Bath Christmas Market achieved a good recommendation score of +33% but it did decrease by -6% compared with the 2022 market score and by -13% compared with the 2019 market.
- Staying visitors gave the highest recommendation score at +52% and, for the first time, local visitors recorded a negative recommendation score of -2% which has impacted on the overall recommendation score achieved for the 2023 market.
- 54% 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 (61% 2019), 31% gave a score of 7 or 8 and were categorised as 'Passives' (25% 2019), whilst 15% gave a score of 0-6 for their likelihood of recommending the market and were therefore categorised as 'Detractors' (14% 2019).



■ Detractors ■ Passives ■ Promoters

Recommendation score +33%

Likelihood of recommending Bath Christmas Market	Recommendation score
ALL 2023	+33%
ALL 2022	+39%
ALL 2019	+46%
LOCAL	-2%
DAY	+32%
STAYING	+52%

42% of visitors had visited/considered visiting other Christmas Markets in 2023.

- When asked if they had visited/considered visiting any other Christmas Markets in 2023, 42% of visitors to the Bath Market said they had.
- A wide range of other Christmas Markets had been considered/visited including Bristol, Winchester, Cardiff, Birmingham, London, Edinburgh, Exeter, York and Manchester and these are summarised in the word cloud below. To see the full list please refer to the appendix which accompanies this report.



The wide range and variety of stalls is one of the key things mentioned by respondents as something which sets Bath Christmas Market apart from other Christmas markets.

- The 42% of respondents who said they had visited/considered visiting other Christmas Markets in 2023 were asked what, if anything, sets Bath apart from other Christmas Markets for them.
- A wide range of comments were provided, and these are summarised in the word cloud below with the wide range and variety of stalls being one of the key things mentioned, along with the atmosphere, location, beauty and architecture of the city. To see the full list please refer to the appendix which accompanies this report.



Bath Christmas Market Survey 2023



Non-Visitors/Lapsed Visitors*



** Please interpret the results in the slide to follow with caution due to the very low sample size for non/lapsed visitors of only 22.*



73% of online survey respondents who said they had not visited the market during 2023 had visited the market previously. 36% had visited another market.

- 73% of online survey respondents who said they had not visited the market during 2023 had visited the market previously (71% in 2022 and 68% in 2019), 23% had never visited (29% and 32% respectively during 2022 and 2019) and 5% didn't know if they had previously visited the market or not.

Whether ever visited Bath Christmas Market (Online survey respondents only)	2023	2022	2019
Yes	73%	71%	68%
No	23%	29%	32%
Don't know	5%	-	-

- 36% (8 online respondents) had visited another Christmas market in 2023 and these are listed in the table below.

Other markets visited? (those who went to another Christmas Market in 2023)
Various events near Andover
Cardiff
Manchester, York, Chester
Oxford, Southampton, Winchester
Exeter
Clevedon
Exeter, Truro
Plymouth

- 50% (4 online respondents) who visited another Christmas market instead of Bath said they chose the other market in direct preference to Bath (50% in 2022 and 40% in 2019). The reasons given for this were:
 - “Dates fitted in better given that we were away for 10 days, mostly overlapping with Bath Market dates. It would be great if you could run this event for a bit longer and a bit closer to Christmas”*
 - “Bath market was closed on the weekend we wanted to visit. The times are completely impractical and close far too soon”*
 - “Very disappointed with Bath Christmas Market last year. I have been going for the past 10 years and felt the change in format was not right, stalls were too spread out and poor quality”*
 - “Less stress with travel, less samey stalls”.*

Bath Christmas Market Survey 2023

Trend Data 2014 - 2023



Visitor type 2014-2023	Staying visitors	Day visitors	Local residents/work in Bath
2023	27%	59%	15%
2022	28%	58%	15%
2019	24%	63%	12%
2018	27%	63%	10%
2017	23%	67%	10%
2016	20%	70%	10%
2015	23%	69%	9%
2014	19%	70%	11%

Group composition & average group size 2014-2023	Adults with children	Adults only	Ave. group size
2023	10%	90%	2.45
2022	8%	92%	2.10
2019	8%	92%	2.15
2018	11%	89%	3.42
2017	16%	84%	3.17
2016	20%	80%	3.65
2015	14%	86%	3.15
2014	6%	94%	2.33

Age group 2014-2023	0-15 years	16-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
2023	6%	11%	21%	15%	15%	19%	12%
2022	4%	13%	20%	12%	15%	17%	19%
2019	5%	12%	20%	13%	20%	18%	13%
2018	5%	10%	17%	10%	14%	23%	21%
2017	13%	8%	13%	12%	18%	20%	16%
2016	14%	11%	14%	13%	20%	16%	11%
2015	8%	8%	17%	13%	19%	21%	14%
2014	3%	11%	16%	13%	24%	18%	16%

Nationality 2014-2023	UK	Overseas
2023	94%	6%
2022	97%	3%
2019	94%	6%
2018	96%	4%
2017	97%	3%
2016	98%	2%
2015	97%	3%
2014	98%	2%

Ave. duration of stay 2014-2023 (staying visitors in Bath only)	Number of nights
2023	1.91
2022	2.24
2019	2.27
2018	2.01
2017	1.79
2016	1.89
2015	1.97
2014	2.17

Whether would consider returning to Bath for a short break at any other time of the year 2019- 2023 (staying visitors in Bath only)	Yes	No	Don't know
2023	92%	4%	5%
2022	95%	3%	2%
2019	91%	3%	6%

Whether first ever visit to Bath Christmas Market 2014-2023	Yes	No
2023	34%	66%
2022	37%	63%
2019	31%	69%
2018	29%	71%
2017	28%	72%
2016	27%	73%
2015	30%	70%
2014	32%	68%

Ave. dwell time at the market (hours) 2014-2023	Decimal	Hours/minutes
2023	4.01	4 hours 1 minute
2022	3.93	3 hours 56 minutes
2019	4.28	4 hours 17 minutes
2018	4.33	4 hours 20 minutes
2017	4.42	4 hours 25 minutes
2016	4.15	4 hours 9 minutes
2015	4.11	4 hours 7 minutes
2014	3.92	3 hours 55 minutes

When decided to visit Bath Christmas Market 2014-2023	Come every year	Last year's market	Early in the year (Jan-June)	Over the summer (July-August)	In the last couple of months (Sept-Oct)	In the last couple of weeks (Nov)	In the last couple of days
2023	26%	5%	8%	10%	19%	16%	14%
2022	29%	1%	7%	12%	21%	15%	16%
2019	28%	5%	8%	10%	23%	16%	10%
2018	26%	6%	8%	10%	24%	16%	11%
2017	27%	6%	6%	9%	28%	15%	9%
2016	27%	6%	8%	9%	27%	15%	8%
2015	26%	6%	5%	9%	27%	18%	9%
2014	24%	7%	4%	9%	20%	19%	18%

Whether Bath Christmas Market is main reason for visiting Bath 2014-2023	Yes	No	Unsure
2023	72%	28%	-
2022	75%	25%	-
2019	79%	21%	-
2018	78%	22%	-
2017	77%	23%	-
2016	76%	24%	-
2015	74%	25%	2%
2014	75%	23%	2%

What is main reason for visiting Bath on this occasion (market not main reason for visit) 2014-2023	Leisure/holiday	Visiting friends or relatives	Shopping trip (special/non-regular)	Business/attending a conference	Shopping trip (regular/household)	Work/Study here	Other
2023	16%	22%	16%	1%	6%	18%	21%
2022	21%	21%	12%	2%	10%	12%	21%
2019	32%	28%	7%	-	2%	14%	15%
2018	28%	23%	19%	1%	-	11%	19%
2017	17%	26%	15%	-	8%	11%	23%
2016	10%	19%	24%	-	8%	14%	24%
2015	27%	15%	24%	3%	6%	1%	25%
2014	22%	19%	26%	1%	2%	13%	15%

How travelled to Bath 2014-2023	Car/van etc.	Train	Bus service	Organised coach trip	Walked from home/accomm	Coach service	Other
2023	54%	24%	8%	2%	11%	2%	2%
2022	53%	27%	7%	2%	10%	2%	
2019	54%	26%	7%	6%	5%	2%	2%
2018	55%	27%	8%	5%	4%	2%	2%
2017	54%	28%	8%	5%	6%	2%	2%
2016	56%	26%	5%	4%	5%	2%	1%
2015	59%	25%	4%	6%	4%	2%	1%
2014	57%	24%	10%	3%	4%		

Car parking used 2014-2023	City centre car park	Park & Ride	Neither/ unsure
2023	55%	24%	22%
2022	54%	35%	11%
2019	41%	42%	17%
2018	41%	27%	32%
2017	37%	33%	31%
2016	39%	34%	27%
2015	44%	30%	26%
2014	46%	30%	25%

Other activities taken part in during visit to Bath 2014-2023	Visit a tourist attraction	Have a meal out	Shopping outside of the market	Attend an organised festive event	Go to the Bath Visitor Information Centre
2023	18%	74%	70%	3%	2%
2022	23%	74%	79%	3%	-
2019	24%	77%	75%	7%	6%
2018	24%	77%	84%	6%	-
2017	24%	76%	85%	-	-
2016	21%	80%	87%	-	-
2015	26%	77%	85%	-	-
2014	20%	74%	84%	-	-

What prompted visit to Bath Christmas Market 2014-2023	2023	2022	2019	2018	2017	2016	2015	2014
Previous visit	49%	48%	54%	52%	46%	49%	52%	48%
Recommendation	25%	25%	25%	24%	21%	19%	22%	26%
Social media e.g. Facebook/Twitter etc.	10%	14%	4%	7%	11%	12%	7%	11%
Other	13%	12%	6%	12%	16%	13%	12%	10%
Internet	7%	7%	13%	14%	12%	14%	20%	23%
Online advertising	2%	3%	3%	2%	3%	4%	n/a	n/a
Can't recall	2%	2%	3%	-	2%	3%	2%	3%
Coach operator	1%	1%	3%	2%	2%	2%	3%	2%
E-Newsletter from Bath Christmas Market	-	1%	7%	7%	11%	3%	3%	5%
Poster	-	1%	1%	-	-	-	-	1%
Local paper	-	-	2%	1%	1%	1%	1%	2%
Radio or podcast promotion	-	-	-	1%	-	-	-	1%

What used the internet for 2014 – 2023	Information sourcing about Bath Christmas Market ONLY	Information sourcing about Bath Christmas Market AND to book accommodation/car hire/flights/attraction tickets etc.	Searching for Christmas shopping ideas generally
2023	36%	36%	36%
2022	50%	38%	26%
2019	50%	38%	32%
2018	53%	32%	21%
2017	60%	32%	17%
2016	70%	17%	13%
2015	57%	36%	7%
2014	59%	32%	9%

Whether follow Bath Christmas Market on any of the following social media sites 2014-2023	Facebook	Twitter	Instagram
2023	85%	6%	48%
2022	71%	6%	43%
2019	82%	10%	22%
2018	25%	3%	7%
2017	32%	5%	5%

Whether made decision to visit after seeing the marketing/promotion for the Bath Christmas Market 2014-2023	Yes	No	Unsure
2023	19%	80%	-
2022	20%	80%	-
2019	18%	80%	2%
2018	17%	82%	1%
2017	15%	82%	3%
2016	18%	79%	3%
2015	34%	63%	2%
2014	16%	82%	2%

VISITOR SPEND BY CATEGORY 2014- 2023 (£/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	Accommodati on in Bath (STAYING VISITORS ONLY)
2023	£26.83	£26.16	£23.82	£3.86	£9.36	£70.90
2022	£30.15	£31.04	£24.42	£9.35	£6.53	£67.23
2019	£23.77	£21.42	£16.79	£1.61	£0.96	£69.17
2018	£26.84	£18.37	£16.98	£2.04	£1.95	£51.65
2017	£37.54	£41.54	£22.09	£2.83	£0.96	£50.51
2016	£23.44	£22.07	£16.14	£1.96	£3.48	£45.91
2015	£31.75	£30.54	£19.51	£1.83	£1.33	£42.71
2014	£25.92	£29.84	£14.69	£1.89	£3.47	£31.79

Visitor Satisfaction levels 2014 - 2023	2023	2022	2019	2018	2017	2016	2015	2014
Range of stalls	4.31	4.29	4.40	4.38	4.52	4.34	4.40	4.57
Quality of stalls	4.41	4.43	4.50	4.46	4.57	4.41	4.48	4.65
Number of new traders (if been before)	3.85	3.80	3.70	3.73	3.90	3.56	3.60	3.86
Range of catering facilities	4.18	4.03	4.27	4.11	4.09	3.83	3.98	4.10
Quality of catering facilities	4.28	4.23	4.36	4.25	4.22	4.03	4.14	4.28
Ease of finding your way around/signage	4.13	3.96	3.96	3.77	3.92	3.79	3.84	4.21
Visitor information available on site	4.00	3.87	3.71	3.67	3.73	3.72	3.70	3.87
Ease of getting around the site/accessing the stalls	4.10	4.00	3.97	3.93	3.83	3.37	3.59	3.96
Site decoration, lighting etc.	4.42	4.39	4.42	4.40	4.48	4.36	4.36	4.47
Quality of entertainment	4.21	4.12	4.21	4.00	4.03	3.76	3.76	4.03
Overall atmosphere	4.46	4.40	4.46	4.37	4.51	4.29	4.36	4.53
Bath Christmas Market overall	4.37	4.37	4.43	4.41	4.49	4.30	4.36	4.57

Likelihood of recommending Bath Christmas Market 2014-2023	Recommendation score
2023	+33%
2022	+39%
2019	+46%
2018	+51%
2017	+53%
2016	+33%
2015	+46%
2014	+66%



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The South West Research Company Ltd

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