Report of Findings
for the Royal Borough of
Windsor & Maidenhead

Windsor Visitor Survey 2017

November 2017

Prepared by:
TSE Research
40 Chamberlayne Road
Eastleigh
Hampshire
SO50 5JH

b

Table of contents

List of Tables

List of Figures

1   EXECUTIVE SUMMARY

1.1   Introduction

This document presents the findings of a survey of visitors to Windsor, conducted between early August and mid September 2017. The survey was commissioned by the Royal Borough of Windsor & Maidenhead and undertaken by TSE Research.

The purpose of the survey was to gather information on the origin, profile, behaviour and satisfaction of visitors to Windsor, and compare results with previous surveys.

Key findings from this year's survey are presented below.

1.2   Visitor profile

This year saw an increase in the proportion of day visitors from holiday bases outside Windsor (55% compared to 48% last year) and similar proportions of people visiting as day visitors from home (34% compared to 32% last year). The remaining 11% of all visitors were staying overnight in commercial or non-commercial accommodation within Windsor (20% in 2016).

Day visitors on holiday were found to be predominately staying in accommodation in London (93%). Five percent were staying in other towns or villages in Berkshire and one percent were staying in accommodation in Surrey.

Average group size was significantly higher than in previous years. On average, visiting parties consisted of 3.85 people, made up of 3.09 adults and 0.76 children. This compares to an average group size of 2.90 people last year made up of 2.25 adults and 0.64 children.

As with previous years, a high proportion of all visiting parties consisted of adults only (68%), and among adult only groups, most (44%) consisted of two adults. Adult only groups made up 72% of visiting parties last year. This year just over a third (33%) of all visitor parties included one or more children (31% last year).

Twenty percent of all people represented within the visitor groups surveyed were children aged 0-15 years (compared to 22% last year). Around a third (29%) were adults aged between 35 and 54 years old and a further 24% of all visitors were mature adults aged 55 years or more.

The survey results indicate a relatively affluent profile of visitors to Windsor. The majority of visitors were from ABC1 households (accounting for 79% of all visitors; 77% last year). This includes 31% of all visitors who were from the top AB professional grade (down from 35% last year).

Overseas visitors accounted for just over half (51%) of the overall sample and represented 39 different countries. France, the United States and Australia were the most frequently mentioned countries of residence. Most overseas visitors were day visitors travelling to Windsor from holiday bases elsewhere (day visitors on holiday).

Domestic visitors came from a wide range of home locations around the UK, however, the highest proportion originated from the Greater London area (45%).

1.3   Use of destination information

Overall, nearly two thirds (61%) of all visitors mentioned one or more features or promotions they had seen prior to their visit (51% last year).

Of the formal channels of visitor information available, websites were most likely to have been used (32%). A few visitors recalled seeing other promotions including information from VICs (12%), the Windsor Visitor Guide (9%) or information on social media (2%). Word of mouth/ recommendation was mentioned by 21% of all visitors.

Nearly half (43%) of those who used websites had visited the Royal Borough's own website (www.windsor.gov.uk) compared with 46% last year. Seventy-nine percent rated the website as 'good' whilst another 16% of visitors rated it as 'very good'.

1.4   Trip features

The highest proportion of visitors indicated that the main purpose of their visit to Windsor was for 'leisure/ holiday' purposes (93%). Five percent were in Windsor primarily for the purpose of visiting friends or relatives (VFR), 1% were on a special shopping trip, 1% were language students and less than 1%were there specifically for eating out.

Those staying in Windsor are the most likely to be visiting for the purpose of seeing friends and/or relatives compared to the other two types of visitor groups.

The majority (90%) of the visitors surveyed this summer were visiting Windsor independently, with the remaining 10% indicating that their visit was with an organised group or tour.

Fifty-six percent of all visitors interviewed in 2017 were visiting Windsor for the first time, while the remaining 44% had visited on at least one occasion previously.

Day visitors spent an average of 4.3 (4.9 nights last year) hours in the town and visitors staying overnight in Windsor stayed for an average of 4.1 nights in 2017 (3.3 nights last year).

Of the visitor groups staying overnight in Windsor, 84% were using serviced accommodation (76% last year), including 67% who were staying in a hotel and 5% who were staying in a B&B or guest house. Fourteen percent of all staying visitors were accommodated in the homes of friends or relatives in 2017.

Forty-three percent of all visitors had travelled to Windsor by private vehicle (car/ van/ motorcycle or motorhome). A further 40% of all visitors used public transport (a train or coach/bus service) and around 13% had arrived in Windsor as part of a coach tour.

A high 36% of visitors who travelled to Windsor by private motor vehicle had used the Park & Ride facility. A further 51% had used the town centre car parks and 13% had parked on the street or at their accommodation base in Windsor.

Ninety percent of visitors said that Windsor Castle had been the main reason for their visit (80% last year). Twenty-two percent said that Legoland had been their main reason for visiting Windsor (8% last year).

Cafe's/ restaurants/ pubs (visited by 69% of visitors) and shops (visited by 27% of visitors) were the most frequently mentioned attractions visited in 2016.

Windsor Castle was the most frequently mentioned formal attraction, with 90% of all visitor groups saying they had or intended to visit inside the Castle.

Unlike in previous years, 45% of all visitors indicated that they had been into the Visitor Information Centre during their visit to Windsor in 2017. This may be due to the high number of overseas visitors encountered that would tend to be less familiar with what Windsor has to offer compared with domestic visitors

The average overall spend on eating out, shopping, entertainment and travel/transport among visitors staying overnight in Windsor in 2017 was £55.55 (per person per 24 hours), lower than the average expenditure of £57.79 last year. In common with previous years, eating out and shopping accounted for the highest proportion of expenditure. Including spend on commercial accommodation, the average total spend for staying visitors, was estimated to be £94.40 per person per night (£106.30 last year).

Day visitors (combining day visitors from home and day visitors on holiday) to Windsor spent an average of £43.58 per person per day during 2016 (higher than the average expenditure of £34.71 last year). Eating out and shopping accounted for the highest proportion of day visitor spend.

1.5   Visitor satisfaction

As in previous years, high levels of visitor satisfaction were reported for many aspects relating to the visitor experience in Windsor. Aspects of the visit which were rated particularly highly in 2017 included: *Feeling of welcome* (4.91 out of 5), *Upkeep of parks & open spaces* (4.88 out of 5), *Value for money for attractions* (4.88 out of 5) *Quality of service at attractions* (4.87 out of 5), *Range of attractions* (4.87 out of 5) and *General atmosphere* (4.86 out of 5).

As in 2016 lowest scores went to *Cost of parking* (2.83 out of 5) and *Ease of parking* (3.55 out of 5). Cost of parking was also the lowest score in the previous two years. It should be noted that only scores lower than 3 are poor scores.

An overview of all performance scores show that compared to last year a high number of performance indicators saw an improvement in their score. To be considered a significant improvement, there needs to be an increase in the satisfaction score of at least 0.20 points.

There were eleven aspects which achieved this level of improvement this year compared to last year. The most significant increases were: *value for money for places to eat/drink* (up 0.69 points in its score), *Value for money for attractions* (up 0.67 points in its score) and *Availability of public toilets* (up 0.48 points in its score).

Only one area dropped by 0.20 points or more when compared to last year. This was the *Ease of parking* (down 0.36 points in its score).

The top response on what contributed the most to visitors overall enjoyment was Windsor Castle (mentioned by 75% of visitors), followed by the general atmosphere and ambience of the town (mentioned by 12% of visitors). In common with previous years, the River Thames and the historic interest of the town featured strongly in the responses given on aspects contributing most to enjoyment.

The majority of visitors (97%) indicated that 'nothing' had spoiled the enjoyment of their visit to Windsor. Of those who did offer comments, a variety of different aspects were mentioned, often by only one or two visitors. This included poor weather, too crowded and difficulty parking.

When visitors were asked about their first impressions of the town, by far the most dominant impression mentioned by five in ten visitors was how attractive and appealing they found the town to be. This was followed by its cleanliness (37%), the feeling of welcome (33%) and the busy/bustling feel (26%).

Overall, 78% of visitor indicated that the visit had met their expectations, while 22% reported that it had exceeded their expectations. Less than 1% reported that the visit had failed to meet their expectations.

Virtually all visitors (99%) indicated that they were 'very likely' or 'likely' to recommend Windsor as a visitor destination to others.

2   INTRODUCTION

2.1   Background

This document presents the findings of a face to face interview survey of visitors to Windsor, conducted between early August and mid September 2017. The survey was commissioned by the Royal Borough of Windsor & Maidenhead and undertaken by TSE Research, the research arm of Tourism South East.

The purpose of the survey was to update previously gathered information on the origin, profile and behaviour of visitors to Windsor, and the characteristics of their visits in order to provide year on year trends. The survey also aimed to explore views on the strengths and weaknesses of Windsor as a visitor destination, and to evaluate opinions on specific aspects of the visitor experience.

Where appropriate, comparisons have been made with the findings of previous surveys to identify trends. Results are presented in tables and graphs with short commentary.

2.2   Research objectives

The objectives of the visitor survey were as follows:

i)   To provide up to date data on the profile, origin, behaviour, use of facilities and opinions of visitors to Windsor in order to help improve understanding of tourism within the town and provide the basis for tourism development.

ii)   To identify the characteristics of visits, in order to better understand why specific visitor types come to Windsor, their perceptions of certain aspects of the town and their particular likes and dislikes.

iii)   Where possible, to make comparisons with previous survey data enabling emerging trends to be identified, so that more informed decisions can be made in relation to future visitor management, marketing and service/facility provision in the town.

2.3   Survey methodology

In order to meet the above objectives, a street survey involving face-to-face interviews with a random sample of adult visitors was carried out by experienced TSE Research interviewers at selected locations within the town centre.

In all, 1850 people were stopped for interview. Of these 722 (39%) were not eligible to complete the interview and 732 (40%) refused to be stopped. In total 396 (21%) adult visitors were interviewed at key locations in Windsor. The distribution of the sample by survey location is presented below.

Table 1: Sample by interview location

Location	Base	Proportion
Windsor & Eton Bridge	35	9%
Corner of High St & Castle Hill	114	29%
Halfway down Peascod Street	78	20%
Windsor Royal Station	139	35%
Guildhall area	30	7%
Total	396	100%

2.4   Statistical reliability

All sample surveys are subject to statistical error that varies with the sample size. Table 2 below shows the margins within which one can be 95% certain that the true figures will lie (based on the sample being randomly selected).

Table 2: Confidence limit

		All Windsor visitors
Result	Sample	396
10% or 90%	+/-	3.0%
20% or 80%	+/-	3.9%
30% or 70%	+/-	4.5%
40% or 60%	+/-	4.8%
50%	+/-	4.9%

The figures are at the 95% confidence limit. This means, for example, that we can be 95% certain that, if 50% of 'all Windsor visitors' surveyed are found to have a particular characteristic or view, there is an estimated 95% chance that the true population lies within the range of +/- 4.9% i.e. between 45.1% and 54.9%. The margins of error shown above should be borne in mind when interpreting the results contained in this report.

Where a figure of 0% is shown in any table of results, it represents a value of less than 0.5%.

2.5   Presentation of results

Key findings are presented under the following headings:

- Visitor profile
- Use of destination information
- Trip features
- Visitor satisfaction

For the purposes of this report, survey respondents are divided into three main types:

'Day visitors from home' – visitors who had travelled from, and were returning to, homes outside Windsor on the day of their visit.

'Day visitors on holiday' – visitors travelling to Windsor for the day while staying away from home in accommodation outside the town or while en route to other locations.

'Staying visitors' – visitors staying overnight (for at least one night) in accommodation in Windsor. This includes those staying with friends or relatives, as well as those staying in commercial serviced or non-serviced accommodation.

3   VISITOR PROFILE

3.1   Visitor type

Of the 396 visitor groups interviewed, 89% were day visitors. The majority of these visitors (55% of all visitors) were day visitors from holiday bases outside Windsor, while 34% were day visitors from home. The remaining 11% of all visitors were staying overnight in commercial or non-commercial accommodation within Windsor.

The distribution between the three visitor types – day visitors from home, day visitors from holiday base elsewhere and staying visitors reveals that this year there was relatively more day visitors from holiday bases elsewhere, fewer staying visitors and similar numbers of day visitors from home.

Figure 1: Visitor type- comparison with previous surveys
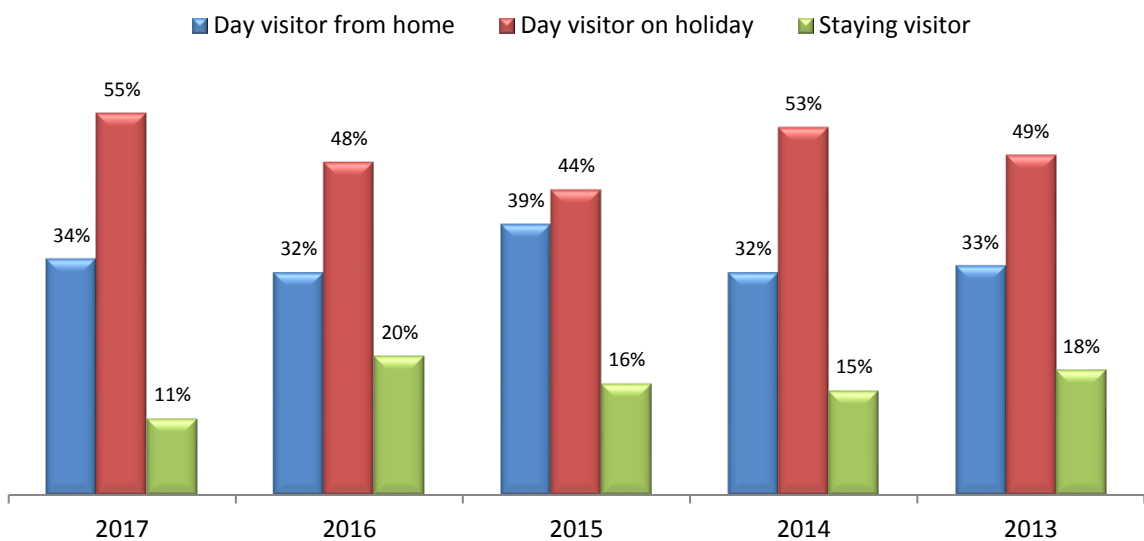
Day visitors on holiday were found to be predominately staying in accommodation in London (93%). Smaller proportions were staying in accommodation in other towns or villages in Berkshire, in Surrey, Kent and Somerset.

Table 3: Locations day visitors on holiday were staying

Greater London	93%
Berkshire	5%
Surrey	1%
Somerset	<1%
Kent	<1%

3.2   Group size and composition

On average, groups of visitors to Windsor in 2017 consisted of 3.85 people (3.09 adults and 0.76 children). There has been a large increase in average group size this year compared to previous years.

Table 4: Average group size - comparison with previous surveys

	2017	2016	2015	2014	2013
Total Adults (16+)	3.09	2.25	2.44	2.36	2.44
Total Children (0-15)	0.76	0.64	0.52	0.39	0.51
Total people	3.85	2.90	2.96	2.74	2.95

Day visitors from home, on average, contained nearly double the number of children than last year (1.46 compared with 0.50 in 2016). The average group size of those visiting from home was also found to be higher than the previous year (4.25 people compared with 2.75 people). Those staying overnight in the town also saw an increase in average group size 3.72 people compared with 2.70 people in 2016. However, the average group size of day visitors on holiday was found to be smaller than previous years (average group size of 3.63 people compared to 3.08 people last year).

Figure 2: Average group size - by visitor type
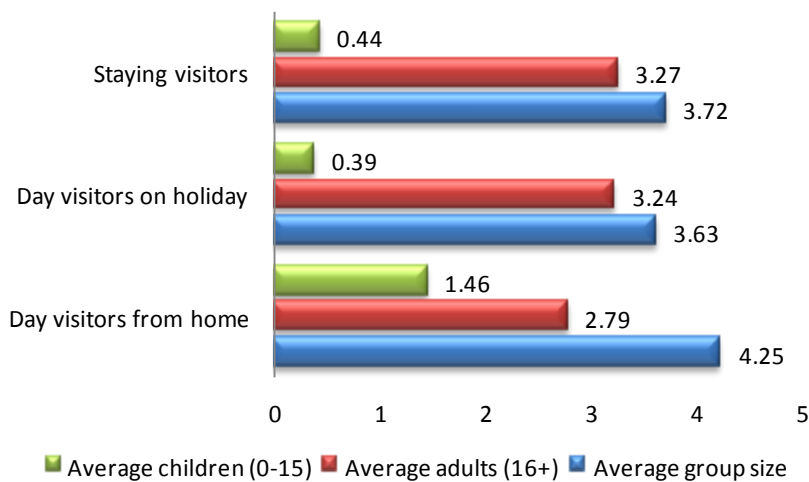
As in previous years, a high proportion of all visiting groups consisted of adults only (68%), and among adult only groups, most consisted of two adults (44%).

A third (33%) of all visitor groups in 2017 included one or more children, which is similar to last year.

The comparative results suggest that since 2013 more family groups make up the visitor market. The proportion of visiting groups containing children was only 25% in 2013.

Table 5: Group composition (adults/ children) – comparison with previous years

	2017	2016	2015	2014	2013
Base:	396	397	399	400	416
Adults only					
One adult	5%	11%	10%	15%	7%
Two adults	44%	48%	42%	41%	49%
Three adults	4%	6%	7%	10%	9%
Four adults	8%	5%	6%	10%	8%
Five or more adults	7%	2%	5%	2%	2%
Sub-total	**68%**	**72%**	**70%**	**76%**	**75%**

Adults & children					
One adult & one child	1%	2%	3%	2%	1%
One adult & two or more children	1%	2%	0%	1%	1%
Two adults & one child	3%	6%	7%	6%	5%
Two adults & two or more children	15%	10%	9%	6%	8%
Three adults & one child	2%	3%	3%	3%	2%
Three adults & two or more children	4%	2%	2%	1%	2%
Four or more adults & one or more children	7%	6%	5%	4%	5%
Sub-total	**33%**	**31%**	**30%**	**24%**	**25%**
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Group composition by visitor type reveals that the day visitors travelling for the day from home contained more family groups (55% of groups contained children) compared with day visitors on holiday (19%) and staying visitors (20%). However, day visitors on holiday and staying visitors tended to have higher numbers of adult only groups than those visiting from home for the day.

Table 6: Group composition (adults/ children) – by visitor type

	Day visitors from home	Day visitors on holiday	Staying visitors
Base:	136	217	43
Adults only			
One adult	4%	6%	5%
Two adults	34%	49%	49%
Three adults	3%	5%	-
Four adults	3%	10%	14%
Five or more adults	1%	10%	12%
Sub-total	**45%**	**80%**	**80%**
Adults & children			
One adult & one child	1%	-	2%
One adult & two or more children	2%	<1%	-
Two adults & one child	4%	2%	5%
Two adults & two or more children	26%	9%	9%
Three adults & one child	2%	1%	2%
Three adults & two or more children	7%	2%	2%
Four or more adults & one or more children	13%	5%	-
Sub-total	**55%**	**19%**	**20%**
Total	**100%**	**100%**	**100%**

3.3   Age profile of respondents

Visitors across all age groups were represented in the 2017 survey. As with previous years, when looking at the age category of all members of the visiting party (not just the respondent), the distribution across the age categories was fairly even and no single age band was particularly dominant.

Twenty percent of all people represented within the visitor groups surveyed were children aged 0-15 years (slightly lower than the 22% found last year). Around a third (29%) were adults aged between 35 and 54 years old. Twenty-four percent of all visitors were mature adults aged 55 years or more; lower than the proportion seen last year (32%).

Figure 3: Visitor age profile – all visitors
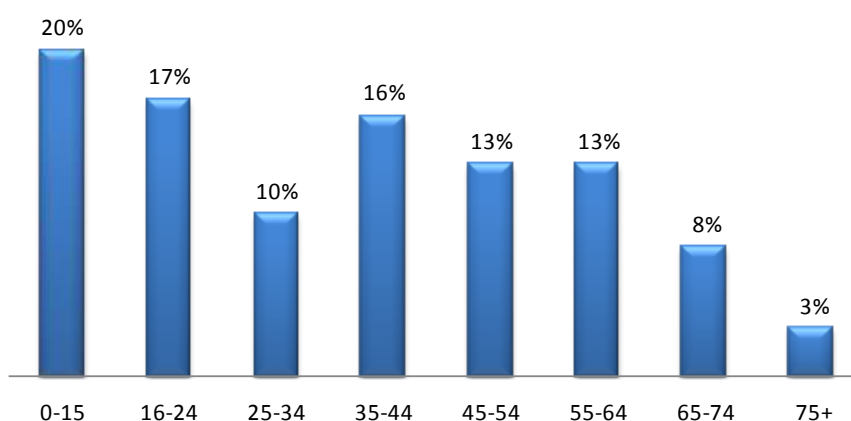
Table 7: Age profile – by visitor type

	Day visitors from home	Day visitors on holiday	Staying visitors	2017	2016	2015	2014	2013
Base:	*136*	*217*	*43*	*396*	*397*	399	400	416
0-15 years	34%	11%	12%	20%	22%	18%	14%	17%
16-24 years	15%	18%	26%	17%	8%	11%	9%	9%
25-34 years	13%	9%	6%	10%	10%	14%	11%	13%
35-44 years	20%	14%	9%	16%	14%	15%	13%	14%
45-54 years	6%	18%	19%	13%	14%	16%	15%	16%
55-64 years	6%	18%	19%	13%	14%	12%	18%	12%
65-74 years	3%	12%	8%	8%	13%	10%	14%	14%
75+ years	1%	4%	3%	3%	5%	4%	5%	4%

3.4   Employment and socio-economic status

Visitors were asked to indicate the employment status of the chief income earner of their household. Three-quarters (75%) of all respondents indicated that their household's chief income earner was in employment at the time of the survey (69% in 2016). Of these, 67% were in full time employment, 3% were working part-time and 5% were self-employed. Compared to last year there were significantly fewer retired visitors (15% compared with 27% in 2016).

Table 8: Employment status of chief household income earner

	2017	2016	2015	2014	2013
Base	*396*	*397*	*399*	*400*	*416*
Employed full-time	67%	55%	58%	56%	56%
Employed part-time	3%	3%	4%	4%	5%
Self-employed	5%	11%	13%	7%	10%
Retired	15%	27%	19%	26%	25%
Full-time student living at home	2%	1%	1%	2%	1%
Full-time student living away	5%	2%	2%	4%	3%
Unemployed	1%	1%	1%	1%	1%
Refused	3%	2%	2%	1%	0%

The socio-economic profile of visitors is based on the occupation of the household's highest income earner and takes into account the previous occupation of those who were retired. The survey results indicate a relatively affluent profile of visitors to Windsor. The majority of visitors were from ABC1 households (accounting for 79% of all visitors in 2017 broadly similar to previous years). This includes 31% of all visitors who were from the top AB professional grade (4% lower than last year).

Sixteen percent of visitors were classified as C2 socio-economic group, with the remaining 5% falling into the lowest group (DE).

Table 9: Socio-economic grouping

	2017	2016	2015	2014	2013
AB	31%	35%	37%	27%	32%
C1	48%	42%	43%	53%	47%
C2	16%	15%	13%	14%	17%
DE	5%	8%	7%	6%	4%

The socio-economic profile varies between type of visitor. Groups of staying visitors and day visitors on holidays contained more visitors from the AB socio-economic group and less from the C2 socio-economic group when compared with day visitors from home.

Figure 4: Visitor socio-economic profile
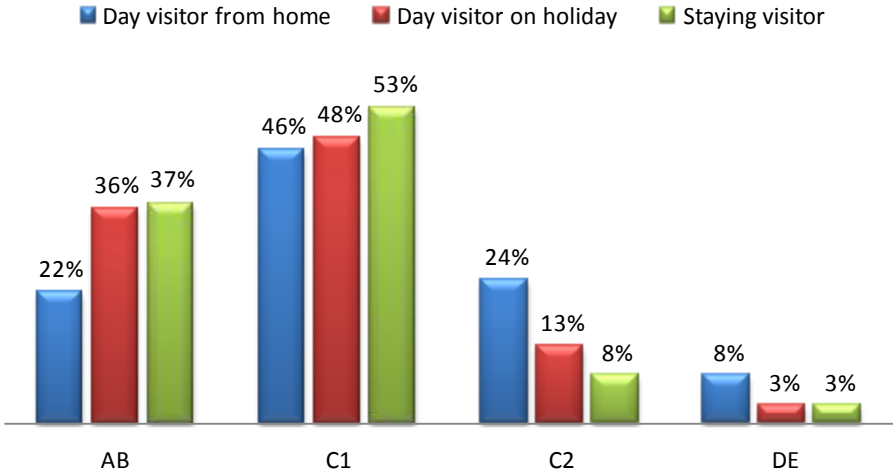
3.5   Visitor origin

Overseas visitors accounted for just over half (51%) of the overall sample in 2017. This could be due to the exchange rate, at the moment, making the United Kingdom as a whole a favourable place for foreigners to visit. Results from previous years show that the overseas market tends to account for a third of the tourism market.

Table 10: Proportion of domestic and overseas visitors

	2017	2016	2015	2014	2013
Domestic visitor	49%	70%	67%	65%	71%
Overseas visitor	51%	30%	33%	35%	29%

A total of 204 visitors from overseas were interviewed, representing 39 different countries. Most overseas visitors were day visitors travelling to Windsor from holiday bases elsewhere (day visitors on holiday). France, the United States, Australia, Germany and Spain were the most frequently mentioned countries of residence.

Table 11: Top 10 countries of overseas visitor residence

	All overseas	Day visitor on holiday	Staying visitor
Base	*204*	*179*	*25*
France	15%	14%	20%
U.S.A.	11%	12%	4%
Australia	10%	9%	20%
Germany	9%	8%	16%
Spain	9%	10%	8%
Italy	8%	7%	12%
Canada	6%	7%	-
Austria	3%	3%	-
Russia	3%	3%	-
Netherlands	2%	2%	-

As shown in Table 12, domestic visitors came from a wide range of home locations around the UK, however, the highest proportion originated from the Greater London area (45%).

As in previous years, the majority of day visitors from home originated from London (56%). Day visitors on holiday and staying visitors tended to come from a wider range of residences across the UK.

Table 12: Top 10 counties of domestic visitor residence

	All domestic	Day visitor from home	Day visitor on holiday	Staying visitor
Base	*192*	*134*	*40*	*18*
Greater London	45%	56%	13%	33%
Surrey	13%	19%	-	-
Essex	6%	7%	3%	6%
Scotland	5%	-	20%	6%
Kent	5%	7%	3%	-
Berkshire	4%	4%	-	11%
Hertfordshire	3%	2%	5%	-
Northern Ireland	3%	-	8%	11%
Wales	2%	-	8%	6%
West Midlands	2%	-	8%	6%

4 USE OF DESTINATION INFORMATION

4.1 Features or promotions seen prior to the visit

Overall, nearly two thirds (61%) of all visitors mentioned one or more features or promotions they had seen prior to their visit. This is slightly higher than the proportion mentioning one or more features or promotions they had seen prior to their visit last year.

Of the formal channels of visitor information available, websites were most likely to have been used (32%). Word of mouth/ recommendation was mentioned by 19% of all visitors. Twelve percent of visitors had visited a Tourist Information Centre and 9% recalled seeing the Windsor Visitor Guide (3%). A few visitors mentioned other sources of information including travel books or guides and using knowledge from previous visits.

Table 13: Features or promotions seen prior to the visit

	2017	2016	2015	2014	2013
Base:	396	397	399	400	418
Website	32%	18%	24%	21%	26%
Word of mouth/recommendation	21%	12%	15%	14%	15%
Visitor Information Centre	12%	1%	2%	1%	1%
Windsor Visitor Guide	9%	3%	5%	3%	2%
Social media	2%	3%	3%	2%	n/a
TV feature	-	4%	3%	3%	4%
Newspaper	-	2%	1%	1%	1%
Other sources	3%	14%	13%	8%	5%
None/did not see/did not use	29%	49%	44%	55%	51%

NB: Multiple responses permitted

Information from website was the most popular source of visitor information for visitors staying overnight in Windsor (21%). Fewer day visitors from home had used a website to obtain information compared with the other two types of visitor. Word of mouth recommendation was also a popular source of information, especially amongst staying visitors.

Table 14: Information sources visitors came across – by visitor type

	Day visitor from home	Day visitor on holiday	Staying visitor
Website	21%	38%	35%
Word of mouth/ recommendation	19%	21%	33%
TV feature	-	-	-
Windsor Visitor Guide	6%	11%	12%
Social media	4%	1%	2%
Visitor Information Centre	5%	17%	9%
Newspaper	-	-	-
Other sources	4%	3%	-
None/did not see/did not use	46%	20%	16%

Visitors who indicated that they had seen websites promoting Windsor were asked which ones they had used. Overall, just under half (43%) of those who used websites had visited the Royal Borough's own website (www.windsor.gov.uk), whilst only 2% had looked at the www.visitthames.co.uk website and less than 1% had visited the VisitBritain website.

Table 15: Websites consulted

	All visitors 2017	Day visitors from home	Day visitors on holiday	Staying visitors
Base:	126	28	83	15
www.windsor.gov.uk	43%	14%	17%	12%
www.visitthames.co.uk	2%	-	2%	-
VisitBritain website	<1%	11%	57%	3%
Other sites	12%	4%	8%	-

NB: Multiple responses permitted

A number of respondents mentioned 'other' websites they had consulted when planning their visit to Windsor – most often this was the search engine Google.

4.2   Opinions on www.windsor.gov.uk website

Those who had seen or used the www.windsor.gov.uk website prior to their visit were asked to rate it on a scale of 1 to 5. The results reveal a high rating of 4.07. Over three-quarters (79%) rated the website as 'good' and 16% rated it as 'very good'.

Figure 5: Visitor rating of website
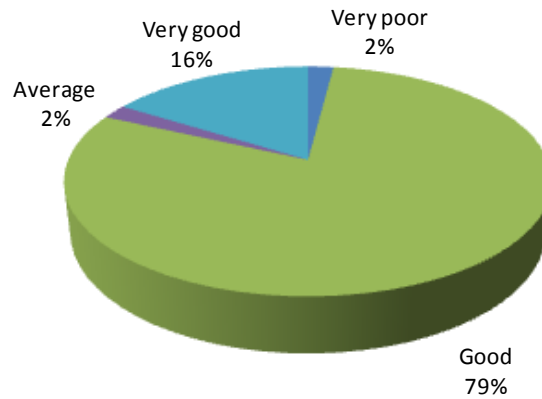
5   TRIP FEATURES

5.1   Main purpose of the visit

As in previous surveys, the highest proportion of visitors indicated that the main purpose of their visit to Windsor was for 'leisure/ holiday' purposes (93%). Five percent were in Windsor primarily for the purpose of visiting friends or relatives (VFR), 1% were on a special shopping trip, 1% were language students and under 1% were there specifically for eating out. The results are broadly consistent to previous years.

Table 16: Main purpose of visit to Windsor

	2017	2016	2015	2014	2013
Base:	*396*	*397*	*399*	*400*	*418*
Leisure/ holiday	93%	86%	87%	86%	90%
VFR	5%	7%	6%	7%	8%
Special shopping trip	1%	3%	4%	3%	1%
Business trip	-	2%	2%	1%	1%
Language student	1%	1%	1%	2%	-
Dining	<1%	1%	n/a	n/a	n/a
Total	100%	100%	100%	100%	100%

The vast majority of people visit Windsor for leisure or holiday purposes. Those visiting Windsor as a day visitor on holiday are the most likely to be visiting for leisure purposes (96%). These visitors will predominately be visiting Windsor as a day excursion whilst holidaying elsewhere or visiting friends and relatives elsewhere.

Visiting friends/relatives is more popular among visitors staying overnight in Windsor – 8% of overnight visits were VFR based compared to 2% of visits among day visitors from home and 1% of visits among day visitors on holiday.

Figure 6: Main purpose of visit by visitor type

- 15 -
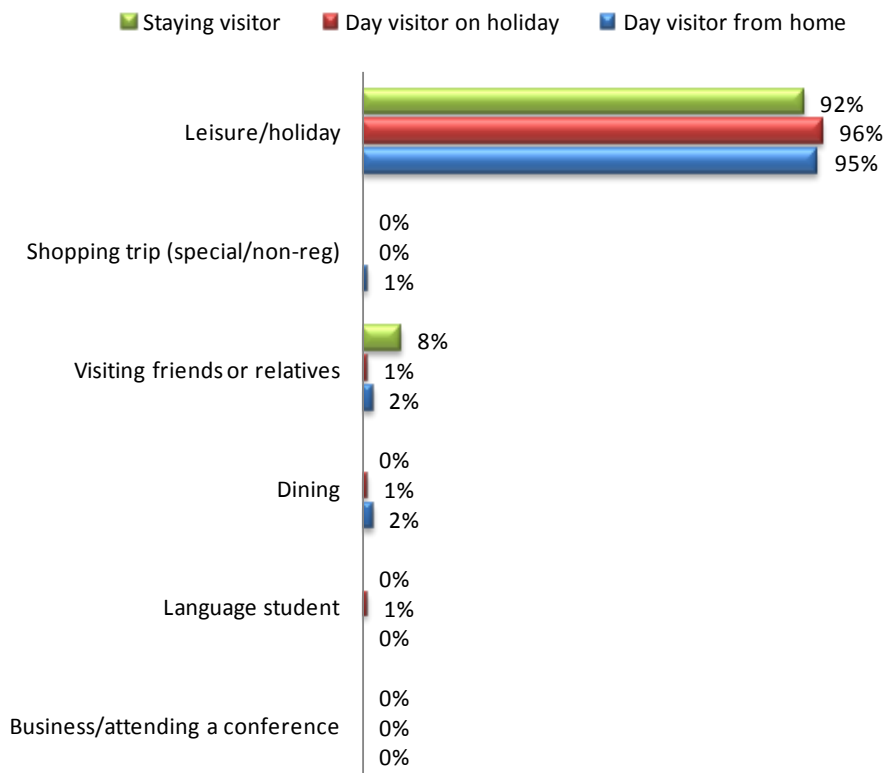
5.2 Whether part of an organised group or coach party

The majority of people who visit Windsor during the summer do so independently. This year only 10% visited as part of an organised group or tour.

The year to year results show some variation in the overall proportion of organised group/tour visits. The proportion this year was the lowest for the past five years.

Table 17: Proportion of visitors travelling as part of organised group/tour

	2017	2016	2015	2014	2013
Base	*396*	*397*	*399*	*400*	*418*
Yes	10%	20%	17%	21%	15%
No	90%	80%	83%	80%	85%

5.3 First time/ repeat visits

Windsor attracts a significant proportion of first time visitors each year. Fifty-six percent of all visitors interviewed in 2017 were visiting Windsor for the first time, while the remaining 44% had visited Windsor at least once before.

The proportion of first-time visitors in 2017 was higher than in previous years. This may be due to the higher proportion of overseas visitors encountered this year.

Table 18: Whether visiting for first time - all visitors

	2017	2016	2015	2014	2013
Base	*396*	*397*	*399*	*400*	*418*
Yes	56%	46%	44%	46%	44%
No	44%	54%	56%	54%	56%

Results by visitor type show differences in the proportion of first time visitors. Day visitors on holiday and staying visitors were more likely to be visiting Windsor for the first time (72% and 63% respectively), whereas day visitors from home were far more likely to be repeat visitors (71% have visited before).

Figure 7: Whether visiting for first time by visitor type
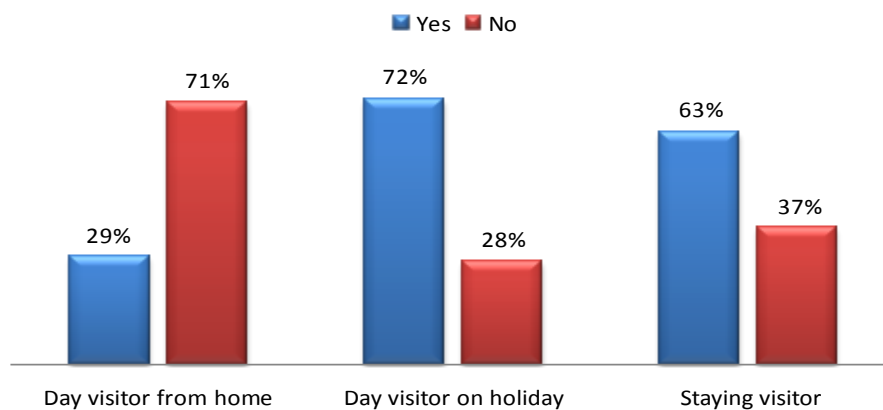
5.4　Average duration of trip

Day visitors to Windsor (visiting from home or while on holiday) spend an average of 4.3 hours in the town. The length of time is lower than that of previous years.

Visitors staying overnight in Windsor stayed for an average of 4.1 nights in 2017, higher than the average of 2016 but comparable with years previous to that.

Figure 8: LOS day visitors

Average duration of trip (hrs)

Year	Value
2013	5.0
2014	5.0
2015	4.9
2016	4.9
2017	4.3
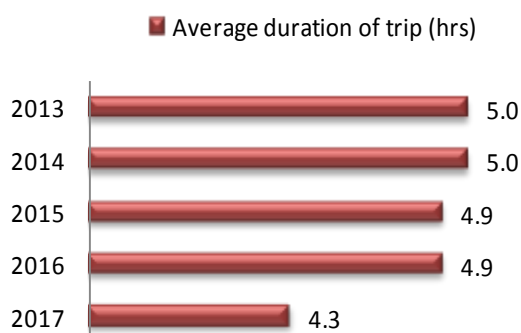
Figure 9: LOS staying visitors

Average duration of trip (nights)

Year	Value
2013	4.7
2014	4.1
2015	4.0
2016	3.3
2017	4.1
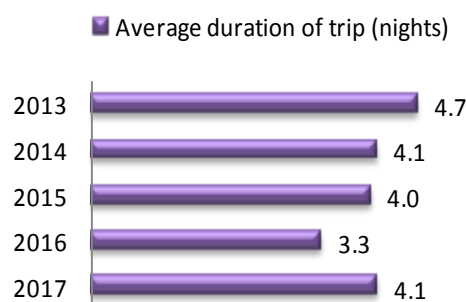
5.5　Type of accommodation used by staying visitors

Of the 43 groups staying overnight in Windsor, 84% were using serviced accommodation, including 67% who were staying in a hotel, 5% who were staying in a B&B/guest house and 12% in a pub/ inn with rooms. The proportion staying in serviced accommodation was higher than the previous four years.

Fourteen percent of all staying visitors were accommodated in the homes of friends or relatives in 2017, a slightly higher proportion than last year.

It should be noted, however, that as the sample is based on only 43 visiting groups, there will be a higher margin of error in the reliability of the results, so they should be treated with a degree of caution.

Table 19: Type of accommodation used

	2017	2016	2015	2014	2013
Base:	*43*	*78*	*67*	*61*	*76*
Hotel	67%	69%	64%	54%	74%
B&B/ Guest house	5%	6%	6%	10%	7%
Pub/ inn	12%	3%	1%	-	-
Rented house/ cottage/ flat	-	3%	1%	-	5%
Caravanning/ camping	-	3%	-	10%	1%
Onboard a boat/ yacht	-	5%	12%	8%	1%
Home of friend or relative	14%	12%	15%	16%	11%
Other (second home, host family etc.)	2%	-	-	5%	1%
Total	100%	100%	100%	100%	100%

5.6   Main mode of transport used

Forty-three percent of all visitors in 2017 had travelled to Windsor by private vehicle (car/ van/ motorcycle or motorhome). This is slightly lower than the proportion of visitors who travelled by private motor vehicle in 2016 (50%).

Public transport was far more popular in 2017 with 37% of visitors coming to Windsor by train (22%) in 2016. Whilst coach tours appeared to be slightly less popular with only 13% travelling to Windsor as part of a coach tour compared with 19% in 2016.

Table 20: Main mode of transport used to reach Windsor

	2017	2016	2015	2014	2013
Base:	*396*	*397*	*399*	*400*	*418*
Car/ van/ motorcycle	43%	50%	49%	43%	60%
Bus/ coach service	3%	4%	6%	9%	8%
Coach tour	13%	19%	17%	16%	10%
Bicycle	0%	0%	1%	2%	0%
Boat	<1%	2%	2%	2%	1%
Train	37%	22%	23%	25%	17%
Taxi	4%	3%	2%	2%	2%
Walked	1%	1%	0%	1%	1%
Other	0%	1%	0%	1%	0%
Total	100%	100%	100%	100%	100%

Day visitors on holiday were most likely to travel to Windsor as part of a coach tour or use public transport and less likely to be using their own vehicle than other visitor types.

Figure 10: Main mode of transport used to reach Windsor by visitor type

- 18 -
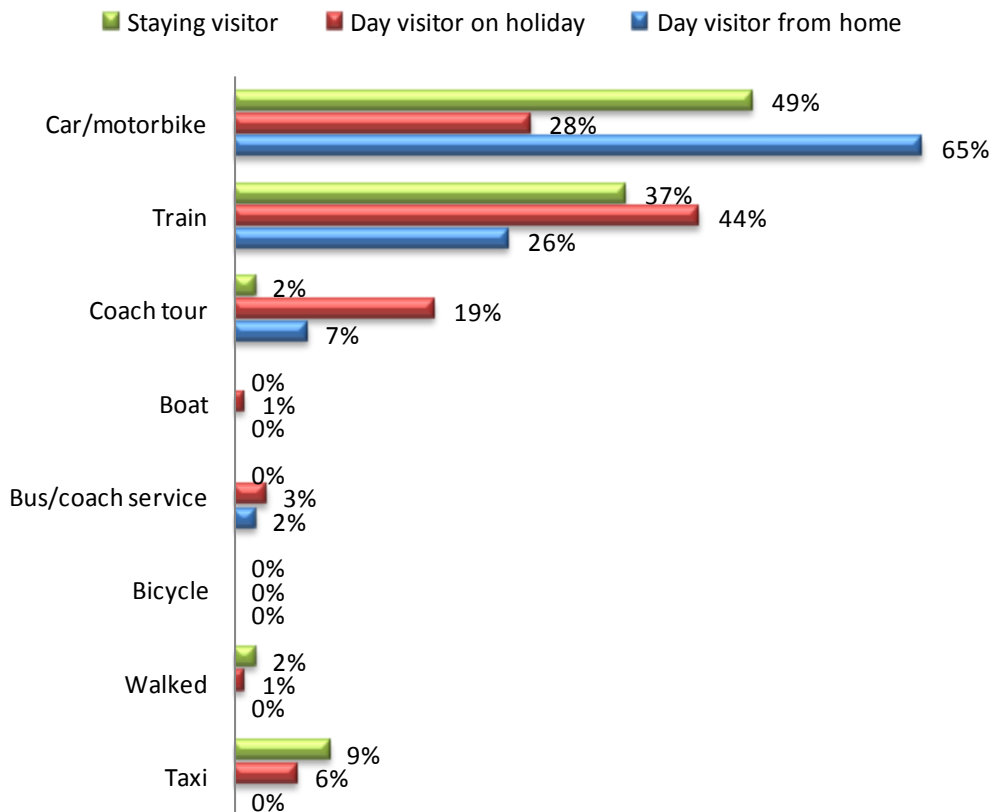
5.7 Use of car parking facilities

There was a large increase in the number of visitors encountered that had driven to Windsor and also used the Park & Ride facility. This year just over a third of visitors (36%) used this facility compared with an average of just below 4% from the previous four years. As in previous years, a high proportion (51%) of those travelling to Windsor by car still used the town centre car parks, with the remainder either parking on street, at their accommodation base in Windsor or parking elsewhere.

Table 21: Parking facilities used by those travelling to Windsor by car

	2017	2016	2015	2014	2013
Base:	*168*	*196*	*196*	*172*	*251*
Used Park & Ride facility	36%	2%	5%	3%	5%
Used town centre car parks	51%	73%	75%	74%	75%
Other (parking on street etc.)	13%	25%	20%	23%	20%

5.8 Local attractions visited during the trip

Visitors were asked whether Legoland or Windsor Castle were the main reason for visiting Windsor. Virtually all day visitors on holiday (95%) and staying visitors (91%) said that Windsor Castle had been the main reason for their visit that day. Far fewer visitors mentioned Legoland as the main reason for their visit, however, higher proportions of day visitors from home (40%) mentioned Legoland compared to the other two visitors types (12% and 14% respectively).

Table 22: Whether Legoland or Windsor Castle were main reason for visiting by visitor type

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base:	*396*	*136*	*217*	*43*
Windsor Castle	90%	80%	95%	91%
Legoland	22%	40%	12%	14%
Neither	3%	3%	3%	2%

* Multiple responses allowed

Visitors were shown a list of attractions and places of interest in and around Windsor and asked which (if any) they had visited or were intending to visit during their current trip to Windsor.

Windsor Castle was again the most frequently mentioned formal attraction, with 90% of all visitor groups saying they had or intended to visit inside the Castle. Day visitors on holiday and staying visitors were particularly likely to visit inside the Castle during their trip to Windsor.

As in previous years, cafe's/ restaurants/ pubs (visited by 69% of visitors) and shops (visited by 27% of visitors) were frequently mentioned attractions in 2017.

Table 23: Visits to local attractions by visitor type

	All visitors	Day visitor from home	Day visitor on holiday	Staying visitor
Base:	*396*	*136*	*217*	*43*
Visit inside Windsor Castle	90%	79%	96%	91%
Visit a cafe/ restaurant/ pub	69%	77%	66%	58%
Visit the shops	27%	21%	30%	30%
Visit inside Legoland	22%	40%	12%	12%
Visit Guildhall Museum	21%	23%	20%	21%
Visit Windsor Great Park/ Long Walk	16%	15%	16%	16%
Take a horse-drawn carriage ride	15%	12%	18%	12%
Stanley Spencer Gallery	8%	7%	9%	2%
River Thames	7%	7%	6%	9%
Take a riverboat excursion/ Duck Tour	6%	10%	5%	5%
Parks & gardens near the river	6%	7%	5%	5%
Follow the Queen's Walkway	5%	5%	5%	5%
Windsor Farm Shop	4%	4%	4%	7%
Arts/ music venue or Theatre Royal	4%	4%	3%	12%
See the soldiers marching	3%	2%	3%	2%
Look around Eton College	3%	2%	2%	7%
Visit inside Savill Garden	3%	4%	3%	-
Take an open top bus tour	2%	1%	1%	9%
Runnymede/ Magna Carta	2%	1%	2%	7%
Hire a rowing boat	2%	2%	1%	2%
Visit inside Frogmore House & Gardens	2%	1%	1%	7%
Dorney Court	2%	1%	2%	-
Windsor Racecourse	1%	1%	1%	2%
Swimming pool/leisure centre	1%	1%	1%	-
Take a guided walking tour	1%	1%	<1%	-

NB: Multiple responses permitted

5.9 Use of the Visitor Information Centre (VIC)

In direct contrast to previous years, nearly half of all visitors encountered (45%) indicated that they had been into the Visitor Information Centre during their visit to Windsor in 2017, varying between 33% of staying visitors to 50% of day visitors on holiday. This dramatic increase in usage may be able to be put down to the high levels of overseas visitors encountered during the survey.

Table 244: Whether visited the VIC

	2017	2016	2015	2014	2013
Base:	*396*	*397*	*399*	*400*	*417*
Yes	*45%*	9%	10%	10%	8%
No	55%	91%	90%	90%	92%

Table 255: Whether visited the VIC by visitor type

	Day visitor from home	Day visitor on holiday	Staying visitor
Base:	*136*	*217*	*43*
Yes	42%	50%	33%
No	58%	50%	67%

5.10   Visitor spend by staying visitors

As shown in Table 26, the average overall spend on eating out, shopping, entertainment and travel/transport among visitors staying overnight in Windsor in 2017 was £55.55 (per person per 24 hours), slightly lower than the average level of expenditure on these items seen in the last two years. Entertainment and travel/transport accounted for the highest proportion of expenditure.

Table 266: Average spend by staying visitors (£ per person per 24 hours)

	2017	2016	2015	2014	2013
Eating out	£23.03	£25.04	£24.39	£17.15	£27.47
Shopping	£14.48	£18.82	£24.68	£12.38	£22.86
Entertainment	£13.03	£10.93	£8.77	£7.88	£10.54
Travel/ transport in Windsor	£5.01	£3.00	£3.68	£3.38	£8.36
Sub-total	*£55.55*	*£57.79*	*£61.52*	*£40.77*	*£69.23*
All commercial accommodation	£38.85	£48.51	£31.37	£33.66	£39.79
All accommodation (incl. second homes and homes of friends/relatives)	£32.74	£34.73	£28.35	£21.72	£33.56
Total (including commercial accommodation)	**£94.40**	**£106.30**	**£92.89**	**£74.43**	**£109.02**

NB: Figures relate to those staying overnight in Windsor only. Average spend figures exclude 'no replies'.

The average spend on commercial accommodation[1] in Windsor was lower this year compared to 2016 (£38.85 per person per night compared to £48.51 in 2016). The average total spend for staying visitors, including spend on commercial accommodation, was estimated to be £94.40 per person per night.

5.11   Day visitor expenditure

Day visitors (combining day visitors from home and day visitors on holiday) to Windsor spent an average of £43.58 per person per day during 2017, Nearly ten pounds higher than the average spend seen last year.

Entertainment and travel/transport accounted for the highest proportion of day visitor spend.

Table 277: Average spend by day visitors (£ per person per day)

	2017	2016	2015	2014	2013
Eating out	£11.98	£12.24	£12.07	£12.31	£12.51
Shopping	£6.93	£11.12	£10.74	£12.44	£11.92
Entertainment	£16.79	£9.29	£8.53	£9.90	£8.58
Travel/ transport in Windsor	£7.88	£2.06	£1.46	£2.73	£6.83
Total	**£43.58**	**£34.71**	**£32.80**	**£37.37**	**£39.83**

NB: Average spend figures exclude 'no replies'.

---

[1] Commercial accommodation in Windsor includes all forms of paid-for accommodation including hotels, B&Bs, rented self-catering accommodation and boat moorings. All accommodation includes accommodation which did not incur a charge.

6   VISITOR SATISFACTION

6.1   Introduction

Visitors were asked to express their opinions on various aspects of their visit which together comprise the 'visitor experience'. Each aspect or indicator was rated on a scale of one to five, where 1= 'very poor' (or the most negative response), 2= 'poor', 3= 'average', 4= 'good' and 5= 'very good' (the most positive response), allowing an average opinion 'score' (out of a maximum of five) to be calculated.

When making comparisons between the mean scores year on year, only a difference of 0.20 points or more should be considered statistically significant.

6.2   Commercial accommodation

Visitors who were staying overnight in commercial accommodation within Windsor were invited to comment on the quality of service and value for money provided by their accommodation establishment.

The majority of visitors (92%) staying in commercial accommodation in Windsor rated the quality of service in their establishment as either 'good' or 'very good', resulting in an average rating score of 4.17. This score is lower than the average scores of 4.34 and 4.50 achieved in the previous two years.

The value for money of commercial accommodation establishments was also rated well, with 92% of visitors rating this aspect of their visit as 'good' or 'very good', leading to an average satisfaction score of 4.17 which is slightly higher than that achieved in 2016 (4.12).

Table 288: Visitor satisfaction with commercial accommodation

	Quality of service	Value for money
Very poor	-	-
Poor	-	-
Average	8%	8%
Good	67%	67%
Very good	25%	25%

Table 299: Satisfaction scored for commercial accommodation

All visitors	Quality of service	Value for money
2017	4.17	4.17
2016	4.34	4.12
2015	4.50	4.32
2014	4.23	4.03
2013	4.35	4.05

6.3   Car parking

Those who had travelled to Windsor by car and used town centre car parks were invited to comment on the ease and cost of parking in the town. As shown in Tables 30 and 31, the ease of parking was rated more favourably than the cost of parking. This is consistent with findings in previous surveys.

The average rating score on ease of parking has fallen over recent years (3.55 compared to 3.91). The cost of parking saw a slight increase in the average satisfaction score given by visitors – 2.83 compared with 2.62 in 2016. However, a significant proportion of visitors continue to find the cost of parking to be expensive with 42% deeming it to be either 'poor' or 'very poor'.

Table 30: Visitor satisfaction with the ease and cost of parking in town centre car parks

	Ease of parking	Cost of parking
Very poor	-	24%
Poor	32%	18%
Average	11%	15%
Good	29%	35%
Very good	29%	8%

Table 31: Satisfaction scores for ease and cost of parking in town centre car parks

All visitors	Ease of parking	Cost of parking
2017	3.55	2.83
2016	3.91	2.62
2015	4.05	2.91
2014	3.87	2.70
2013	3.71	2.80

6.4 Visitor attractions and places to visit

The range of attractions and places to visit in Windsor was rated extremely highly by visitors in 2017, with the mean score of 4.87 being significantly higher than the average score of 4.60 achieved in the previous year. Virtually all visitors (99%) rated this aspect as 'good' or 'very good'.

The quality of service at attractions and places to visit was also rated very extremely high by visitors to Windsor; with all of them indicating this aspect of their visit had been 'good' or 'very good' (98% in 2016). The scores for quality of service have been increasing year on year and so the mean score of 4.87 was the highest for this aspect in the last five years.

Opposite to what has happened in previous years, the value for money of attractions and places to visit was rated favourably with an average score of 4.88 (4.21 in 2016). 99% of visitors rated this aspect as 'good' or 'very good'. This may be due to the high proportion of overseas visitors encountered this year and the favourable exchange rate that they are currently experiencing.

Table 32: Visitor satisfaction with attractions and places to visit

	Range	Quality of service	Value for money
Very poor	-	-	-
Poor	-	-	-
Average	1%	-	<1%
Good	12%	13%	11%
Very good	88%	87%	88%

Table 33: Satisfaction scores for attractions and places to visit

All visitors	Range	Quality of service	Value for money
2017	4.87	4.87	4.88
2016	4.60	4.63	4.21
2015	4.56	4.55	4.16
2014	4.62	4.56	4.12
2013	4.56	4.56	4.00

6.5   Places to eat and drink

The range of places to eat & drink was particularly well received, with 77% of all respondents describing this as 'very good' (68% in 2016) and providing an average score of 4.76 out of 5, higher than in previous years.

The quality of service in places to eat & drink was also rated highly, with all visitors describing this as 'good' or 'very good' (93% in 2016). The average score of 4.81 out of 5 is significantly higher than that achieved in 2016 (4.47).

Eighty-one percent of visitors in 2016 rated the value for money of places to eat & drink in Windsor as 'very good' (35% in 2016) and a further 19% rated it as 'good' (46% in 2016) resulting in an average score of 4.81 out of 5, significantly higher than any score achieved for this aspect in the past five years.

Table 34: Visitor satisfaction with places to eat and drink

	Range	Quality of service	Value for money
Very poor	-	-	-
Poor	-	-	-
Average	<1%	-	-
Good	23%	19%	19%
Very good	77%	81%	81%

Table 35: Satisfaction scores with places to eat and drink

All visitors	Range	Quality of service	Value for money
2017	4.76	4.81	4.81
2016	4.63	4.47	4.12
2015	4.62	4.53	4.08
2014	4.64	4.53	4.19
2013	4.64	4.44	4.08

6.6   Shops and shopping

The range of shops was particularly highly rated, with 98% of all respondents describing this as 'very good' or 'good' (93% in 2016) and an average score of 4.61 out of 5.

The quality of the shopping environment was also rated highly, with 99% of visitors describing this as 'good' or 'very good' (97% in 2016). The mean score of 4.71 out of 5 is higher than the scores recorded for this indicator in previous years.

The vast majority of visitors this summer (99%) perceived the quality of service in shops to be 'good' or 'very good' (94% in 2016). The average score of 4.77 in 2017 is also higher than the scores recorded for this indicator in previous years.

Table 36: Visitor satisfaction with shopping facilities

	Range	Shopping environment	Quality of service
Very poor	-	-	-
Poor	-	-	-
Average	2%	<1%	<1%
Good	35%	27%	22%
Very good	63%	72%	77%

Table 37: Satisfaction scores for shopping facilities

All visitors	Range	Shopping environment	Quality of service
2017	4.61	4.71	4.77
2016	4.58	4.63	4.60
2015	4.59	4.60	4.53
2014	4.55	4.55	4.51
2013	4.56	4.55	4.46

6.7   Road and pedestrian signage

Visitors who travelled into Windsor by car were invited to comment on road signage into the town. In total, 99% considered road signage to be 'good' or 'very good' (89% in 2016). The average satisfaction score of 4.77 is far higher than in previous years.

The average score for pedestrian signage in Windsor was also rated high at 4.82, up from 4.48 in 2016. Ninety-nine percent of visitors this summer rated this aspect of their visit as 'good' or 'very good' (which is consistent with the previous three years).

Display maps and information boards in Windsor were considered by virtually all visitors to be 'good' or 'very good' (99%). The average score achieved this summer of 4.84 is also higher than the previous four years.

Table 38: Visitor satisfaction with signage

	Road signs	Pedestrian signs	Display maps/ info boards
Very poor	-	-	-
Poor	-	-	<1%
Average	1%	1%	<1%
Good	21%	17%	14%
Very good	78%	82%	85%

Table 39: Satisfaction scores with signage

All visitors	Road signs	Pedestrian signs	Display maps/ info boards
2017	4.77	4.82	4.84
2016	4.40	4.48	4.49
2015	4.47	4.52	4.41
2014	4.47	4.48	4.46
2013	4.29	4.38	4.31

6.8   Public toilets

Overall, 99% of visitors perceived the availability of public toilets in Windsor to be either 'good' or 'very good'. This is a significant increase on previous years when in 2016 82% and in 2015 only 71% rated this aspect as 'good' or 'very good'. An average satisfaction score of 4.71 was achieved which is the highest average score achieved in recent years.

The cleanliness of toilets was also rated highly, with 81% of visitors who used these facilities rating them as 'very good' and a further 19% rating them as 'good' (60% and 31% respectively in 2016). The mean score of 4.81 is also the highest average satisfaction score achieved in the past four years.

Table 40: Visitor satisfaction with public toilet facilities

	Availability of public toilets	Cleanliness of toilets
Very poor	-	-
Poor	<1%	-
Average	1%	-
Good	26%	19%
Very good	73%	81%

Table 41: Satisfaction scores with public toilet facilities

All visitors	Availability of public toilets	Cleanliness of toilets
2017	4.71	4.81
2016	4.23	4.42
2015	3.95	4.26
2014	4.17	4.38
2013	4.10	4.31

6.9   Streets, parks and open spaces

As in previous years, the general cleanliness and upkeep of streets and public spaces in the town was rated highly by visitors. Eighty-four percent of visitors described the cleanliness of Windsor's streets as 'very good' (64% last year) and 16% rated it as good (30% in 2016). The mean score of 4.84 out of 5 was also higher than in previous years.

The upkeep of parks and open spaces in Windsor was also rated highly, with a mean score of 4.88 out of 5. Eighty-eight percent of visitors rated this aspect as 'very good' (74% in 2016).

Table 42: Visitor satisfaction with streets, parks and open spaces

	Cleanliness of streets	Upkeep of parks & open spaces
Very poor	-	-
Poor	-	<1%
Average	-	-
Good	16%	11%
Very good	84%	88%

Table 43: Satisfaction scores for streets, parks and open spaces

All visitors	Cleanliness of streets	Upkeep of parks & open spaces
2017	4.84	4.88
2016	4.58	4.74
2015	4.65	4.71
2014	4.64	4.69
2013	4.61	4.66

6.10   Visitor Information Centre

Unlike in previous years, a large proportion of visitors surveyed in 2017 (45% of all visiting parties) had been into the Visitor Information Centre (VIC). This may be due to the high number of overseas visitors encountered that would tend to be less familiar with what Windsor has to offer compared with domestic visitors. Overall, visitor opinions reflect high levels of satisfaction with the services provided by the VIC.

The ease of finding the VIC was generally rated 'good' or 'very good' and the mean score of 4.68 out of 5, was higher than in 2016 (4.54).

The quality of service in the VIC was rated very high at 4.73 out of 5.00, but was still slightly lower than the average satisfaction score of 2016 (4.78). All visitors rated this aspect as 'good' or 'very good'.

The majority of visitors described the usefulness of information received as 'very good' (79%), and the average score of 4.79 out of 5 in 2017 reflects the high level of satisfaction among visitors. The average score for usefulness of information has increased each year.

Table 44: Visitor satisfaction with VIC

	Ease of finding	Quality of service	Usefulness of info.
Very poor	-	-	-
Poor	-	-	-
Average	1%	-	-
Good	31%	27%	21%
Very good	68%	73%	79%

Table 45: Satisfaction scores for VIC

All visitors	Ease of finding	Quality of service	Usefulness of info.
2017	4.68	4.73	4.79
2016	4.54	4.78	4.77
2015	4.54	4.68	4.64
2014	4.44	4.46	4.55
2013	4.24	4.56	4.52

6.11   Perceptions of overcrowding and safety from crime and traffic

In addition to asking about levels of satisfaction with facilities and services offered by Windsor, visitors were also asked to indicate the extent to which they agreed or disagreed with a number of statements relating to other aspects of their visit. Again, the extent to which they agreed or disagreed was rated on a scale of 1 (strongly disagree) to 5 (strongly agree).

As shown in Table 46, just over half (53%) of all visitors 'agreed' or 'strongly agreed' with the statement that 'Windsor is not too overcrowded' (68% in 2016). Twenty-six percent of visitors 'disagreed' or 'strongly disagreed' with the statement, up from 15% in 2016. The mean score of 3.39 out of 5 is lower than the previous few years.

Table 46: Visitor perception of safety

	Windsor is not too overcrowded	I felt quite safe from crime in Windsor	As a pedestrian in Windsor I felt quite safe from the traffic
Disagree strongly	4%	-	-
Disagree	22%	-	-
Neither /or	21%	2%	3%
Agree	37%	44%	44%
Agree strongly	16%	55%	54%

Visitor opinions relating to the feeling of safety from crime and traffic have increased when compared with the findings from previous surveys. Ninety-nine per cent of visitors 'agreed' or 'strongly agreed' with the statement 'I felt quite safe from crime in Windsor compared with 93% in 2016.

Ninety-eight per cent of visitors in 2017 indicated that as a pedestrian, they felt quite safe from the traffic in Windsor (92% in 2016). The mean score of 4.51 is also higher than in previous years.

Table 47: Satisfaction scores for safety

All visitors	Windsor is not too overcrowded	I felt quite safe from crime in Windsor	As a pedestrian in Windsor I felt quite safe from the traffic
2017	3.39	4.53	4.51
2016	3.61	4.36	4.22
2015	3.57	4.32	4.10
2014	3.56	4.49	4.37
2013	3.26	4.19	4.05

6.12   Atmosphere, welcome and overall enjoyment

The survey results from 2017 for the general atmosphere, feeling of welcome in Windsor, and overall trip enjoyment reflect continued high levels of visitor satisfaction, with ratings in 2017 being higher in two out of the three aspects when compared with previous surveys. All visitors described the general atmosphere in Windsor as 'good' or 'very good'.

The feeling of welcome in Windsor was also rated highly, with 91% of visitors rating this aspect 'very good' (76% in 2016). The average satisfaction score of 4.91 is higher than the score of 4.73 achieved in 2016.

The majority (99%) of visitors in 2017 rated the enjoyment of their visit as 'high' or 'very high' (92% last year). However, the average score of 4.21 out of 5 is slightly lower than the average scores of the previous three years.

Table 48: Visitor satisfaction with atmosphere, welcome and overall enjoyment

	General atmosphere	Feeling of welcome	Overall enjoyment
Very poor	-	-	-
Poor	-	-	-
Average	-	-	1%
Good	14%	9%	78%
Very good	86%	91%	21%

Table 49: Satisfaction scores for atmosphere, welcome and overall enjoyment

All visitors	General atmosphere	Feeling of welcome	Overall enjoyment
2017	4.86	4.91	4.21
2016	4.78	4.73	4.37
2015	4.77	4.70	4.40
2014	4.81	4.72	4.41
2013	4.77	4.69	4.34

6.13   Overview of comparative scores

An overview of all performance scores show that compared to last year most changes have been very good. Forty-six performance indicators which saw a significant improvement compared to last year (indicated with a plus sign and typed in **bold** in the table below). To be considered a significant improvement, there needs to be an increase in the satisfaction score of at least 0.20 points. In total 22 out of the 26 aspects being rated improved on their satisfaction scores when compared with 2016

Only one area dropped by 0.20 points or more when compared to last year. This was the *Ease of parking* which dropped by 0.36 points compared to last year.

Table 50: Overview of comparative scores

Indicators	2017	2016	2015	2014	2013	*2017/2016 % change*
Quality of service for accommodation	4.17	4.34	4.50	4.23	4.35	-0.17
Value for money for accommodation	4.17	4.12	4.32	4.03	4.05	+0.05
Ease of parking	**3.55**	**3.91**	**4.05**	**3.87**	**3.71**	**-0.36**
Cost of parking	**2.83**	**2.62**	**2.91**	**2.70**	**2.80**	**+0.21**
Range of attractions	**4.87**	**4.60**	**4.56**	**4.62**	**4.56**	**+0.27**
Quality of service for attractions	**4.87**	**4.63**	**4.55**	**4.56**	**4.56**	**+0.24**
Value for money for attractions	**4.88**	**4.21**	**4.16**	**4.12**	**4.00**	**+0.67**
Range of places to eat/drink	4.76	4.63	4.62	4.64	4.64	+0.14
Quality of service for places to eat/drink	**4.81**	**4.47**	**4.53**	**4.53**	**4.44**	**+0.34**
Value for money for places to eat/drink	**4.81**	**4.12**	**4.08**	**4.19**	**4.08**	**+0.69**
Range of shops	4.61	4.58	4.59	4.55	4.56	+0.03
Quality of shopping environment	4.71	4.63	4.60	4.55	4.55	+0.08
Quality of service for shopping	4.77	4.60	4.53	4.51	4.46	+0.17
Road signs	**4.77**	**4.40**	**4.47**	**4.47**	**4.29**	**+0.37**
Pedestrian signs	**4.82**	**4.48**	**4.52**	**4.48**	**4.38**	**+0.34**
Display maps/ info boards	**4.84**	**4.49**	**4.41**	**4.46**	**4.31**	**+0.35**
Availability of public toilets	**4.71**	**4.23**	**3.95**	**4.17**	**4.10**	**+0.48**
Cleanliness of public toilets	**4.81**	**4.42**	**4.26**	**4.38**	**4.31**	**+0.39**
Cleanliness of streets	**4.84**	**4.58**	**4.65**	**4.64**	**4.61**	**+0.26**
Upkeep of parks & open spaces	4.88	4.74	4.71	4.69	4.66	+0.14
Ease of finding VIC	4.68	4.54	4.54	4.44	4.24	+0.14
Quality of service for VIC	4.73	4.78	4.68	4.46	4.56	-0.05
Usefulness of info. at VIC	4.79	4.77	4.64	4.55	4.52	+0.02
General atmosphere	4.86	4.78	4.77	4.81	4.77	+0.08
Feeling of welcome	4.91	4.73	4.70	4.72	4.69	+0.18
Overall enjoyment	4.21	4.37	4.40	4.41	4.34	-0.16

6.14　Top and bottom performing areas

The majority of the performance indicators rated this year received extremely high scores of 4.5 plus out of 5, which collectively contributed to the high level of overall trip enjoyment. However, several of the indicators measured scored particularly well this year.

The top five performing aspects rated this year were:

	Satisfaction score
Feeling of welcome	*4.91*
Upkeep of parks & open spaces	*4.88*
Value for money of attractions	*4.88*
Range of attractions	*4.87*
Quality of service at attractions	*4.87*

As with 2016, there were only two indicators which received a score lower than 4 out of 5. These were:

	Satisfaction score
Ease of parking	*3.55*
Cost of parking	*2.83*

6.15　First impression of Windsor

Visitors were invited to comment on their first impressions of the town. The open ended comments have been grouped into different aspects and the full list is presented in the Appendices. The top responses mentioned are presented below.

By far the most dominant impression mentioned by 47% of all visitors was how attractive and appealing they found the town to be. Others mentioned the cleanliness (37%), feeling of welcome (33%) and the busy/bustling feeling (26%).

Figure 11: Images/themes conveying first impressions

6.16　What visitors liked most about Windsor

Visitors were invited to say what they liked or enjoyed most about Windsor and comment on any aspect which may have reduced the enjoyment of their visit. The open ended comments have been grouped into different aspects and the full list is presented in the Appendices.

The key aspects mentioned on enjoyment are presented below and as in previous years, 'the Castle' was the top response (mentioned by 75% of visitors), followed by the attractiveness of the town (15%) and the general atmosphere and ambience of the town (mentioned by 12% of visitors).

Figure 12: Aspects of the town most liked

The majority of visitors (97%) indicated that 'nothing' had spoiled the enjoyment of their visit to Windsor.

Of those who did offer comments, a variety of different aspects were mentioned, often by only one or two visitors. This included the poor weather, too crowded and difficulty parking.

6.17 Meeting of expectation and likelihood of recommending

Overall, 78% of visitor indicated that the visit had met their expectations, while 22% reported that it had exceeded their expectations. There were no visitors that reported that their visit had failed to meet their expectations. The findings are broadly consistent with previous surveys.

Table 51: Whether the visit met expectations

	2017	2016	2015	2014	2013
Base:	*396*	*397*	*399*	*400*	*416*
Met expectations	78%	72%	72%	77%	75%
Exceeded expectations	22%	27%	26%	22%	22%
Failed to meet expectations	0%	1%	2%	1%	3%

As in previous years, the vast majority of respondents indicated that they were 'very likely' or 'likely' to recommend Windsor as a visitor destination to others (97%).

Figure 13: Likelihood of recommending
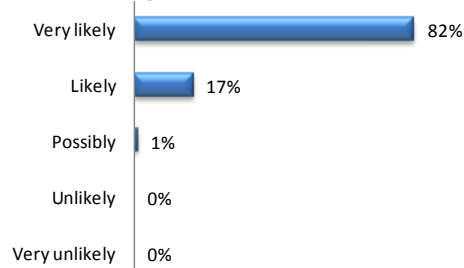
7   APPENDIX 1: COPY OF QUESTIONNAIRE

WINDSOR VISITOR SURVEY 2017

Windsor Sites: Date: ..../......./17   Interviewer Initials:_____

Windsor & Eton Bridge	-1	Time: 1100-1300 → -1 → Weather:
Cnr High St & Castle Hill	-2	1301-1500 → -2 → Wet → -1
Halfway down Peascod Street	-3	1501-1700 → -3 → Cloudy (completely overcast) → -2
Windsor Royal Station	-4	1701+ → -4 → Sunny (or sunny intervals) → -3
Guildhall area	-5		

Good morning/afternoon. I'm.............. from Tourism South-East. We are conducting a survey of visitors to Windsor on behalf of Windsor Borough Council. It should only take 10 minutes. Would you be willing to take part?

Refusal →   →   1 →   2 →   3 →   4 →   -5 →   -6 →   -7 →   -8 →   -9 →   -10

1. Do you live in Windsor or within a 10 mile radius of the Town Centre? *(SHOW MAP IF NEEDED)*

→ Yes →   -1 ...   *Thank and close interview. Do not count to quota. Record interview closures below*

→ No →   -2 →   Go to Q2

→ Closed →   1   2   3   4   5   6   7   8   9   10

2. How close to the end of your visit are you? *(READ LIST)*

→ Just going →   -1
→ Will probably stay a little longer →   -2
→ About half way through →   -3
→ Just arrived →   -4 → *Close interview. Do not count to quota*

→ Closed →   1   2   3   4   5   6   7   8   9   10

3. What is your MAIN reason for visiting Windsor?
→ *(SHOWCARD 1 – ONE RESPONSE ONLY)*

→ Leisure or holiday visit →   -1
→ Visiting friends or relatives →   -2
→ Shopping trip (special/non-regular) →   -3
→ Dining →   -4
→ Business/attending a conference →   -5
→ Language student →   -6
→ Shopping trip (regular/household) →   -7 → *Close interview*
→ Work/study here →   -8
→ Other →   -9 → *Do not count to quota*

→ Closed →   1   2   3   4   5   6   7   8   9   10

4. Where do you live?

→ Home town...

→ County or Country.......................................

5a. Have you come from home today?
→   →   →   Yes →   -1 →   No →   -2
5b. Are you returning home today?
→   →   →   Yes →   -1 →   No →   -2

IF "YES" TO BOTH Q5A & Q5B GO TO Q7 (next page)

6a. Are you/have you been staying overnight in Windsor?

→   →   Yes →   -1 Go to Q6c
         No →   -2 Go to Q6b

6b. If no, where are you staying?

→ Nearest town..................... County..............

6c. How many nights are you staying? *(in Windsor or elsewhere)*

[ ] nights

.....................Column Break.....................

6d. What sort of accommodation are you staying in?

Hotel	-01 Go to Q6e
B&B/Guest House	-02
Pub/Inn	-03
Rented self catering accommodation	-04
Touring caravan	-05
Static caravan – owned	-06
Static caravan – rented	-07
Camping	-08
Youth hostel	-09
Narrowboat/ boat/ yacht	-10 Go to
Holiday centre/village	-11 Q6f
Language school	-12
Home of friend/relative	-13
Second home	-14
Timeshare	-15
University accommodation	-16
With host family	-17
Other	-18

6e. What type of hotel are you staying in?

2" or less	Tourist/Budget	-1
3"	Average comfort	-2
4"	Superior comfort	-3
5"	Luxurious comfort	-4

If NOT STAYING OVERNIGHT IN WINDSOR, go to Q7

ASK ALL VISITORS STAYING IN WINDSOR:

6f. How much have/will you and your party be spending on your accommodation for the duration of your stay in Windsor (inclusive of breakfast if included in the price of your accommodation)? →   £..................

→ *Put "0" if spent/expect to spend nothing*

→ *Tick box if Don't know/Can't recall/Declined to say* ☐

ASK ALL THOSE STAYING IN COMMERCIAL (PAID-FOR) ACCOMMODATION IN WINDSOR:

6g. How would you rate the quality of service provided by your accommodation establishment?
→ *(READ OUT)*

→   → Very poor →   -1 →   Good →   -4
→   → Poor →   -2 →   Very good →   -5
→   → Average →   -3 →   Don't know →   -6

6h. How would you rate your accommodation in terms of value for money?
→ *(READ OUT)*

→   → Very poor →   -1 →   Good →   -4
→   → Poor →   -2 →   Very good →   -5
→   → Average →   -3 →   Don't know →   -6

NOW GO TO Q8

ASK ALL DAY VISITORS:

7. How many hours do you expect to spend in Windsor today?

| | hours |

ASK ALL:

8. → Are either of the following attractions the main reason you have chosen to visit Windsor?

Windsor Castle → → -1
Legoland → → → -2
Neither → → → -3

9. → Before this visit did you see any features, advertisements or promotions for Windsor via any of the following? (READ OUT LIST)

Website → → → → -1 ··· Go to Q10
Windsor Visitor Guide → → → -2
Word of mouth/recommendation → -3
Social media (Facebook, Twitter etc) → -4
TV feature → → → → -5
Radio feature → → → → -6 ···· Go to Q11
Newspaper → → → → -7
Visitor Information Centre → → -8
Other (specify below) → → → -9

....
None of the above → → → -10

10. Which website did you use?

www.windsor.gov.uk → -1 → Go to Q10a
www.visitthames.co.uk → -2 → Go to Q11
Visit Britain website → -3 → Go to Q11
Other (specify below) → -4 → Go to Q11

....

10a. How do you rate the www.windsor.gov.uk site?

→ Very poor → -1 → → Good → → -4
→ Poor → → -2 → → Very good → -5
→ Average → -3 → → Don't know → -6

11. Is this your first ever visit to Windsor?

→ → Yes → -1 → No → -2

12. What was the main mode of transport you used for the longest part of your journey to Windsor?

Car/van/motorcycle/motorhome -1 Go to Q13a
Bus/coach service -2 Go to Q14
Coach tour -3 Go to Q14
Bicycle -4 Go to Q14
Boat -5 Go to Q14
Train -6 Go to Q14
Taxi -7 Go to Q14
Walked -8 Go to Q14
Other -9 Go to Q14

13a. → Have you used the Park & Ride scheme today?
→ → → ···Yes → → -1··· Go to Q14
→ → → ···No → → -2··· Go to Q13b

13b. → Have you used any of the Town Centre car parks today?
→ → → ···Yes → → -1··· Go to Q13c
→ → → ···No → → -2··· Go to Q14

············· Column Break ·············

13c. → How easy did you find it to park? (READ LIST)

→ Very difficult → -1 → Quite easy → -4
→ Quite difficult → -2 → Very easy → -5
→ Neither particularly → -3 → Don't know → -6
→ difficult or easy →

13d. → How would you rate the cost of parking in Windsor? (READ LIST)

→ Very expensive → -1 → Reasonable → -4
→ Quite expensive → -2 → Very reasonable → -5
→ About average → -3 → Don't know → -6
→ Free parking / Blue Badge holder -7

ASK ALL:

14. What was your first impression of the town centre at your point of entry (i.e. from the car/ coach park, station, bus stop)? (DO NOT PROMPT. Circle all that apply or write in the space provided)

Attractive/ appealing -01 → Scruffy/ run down → -06
Welcoming → -02 → Dirty → → -07
Clean → → -03 → Noisy → → -08
Busy/ bustling → -04 → Overcrowded → -09
Traditional → -05 → Other (specify below) → -10
→ ....
→ ....

15. → Which of these attractions in Windsor and the Royal Borough have you visited/ do you intend to visit DURING THIS VISIT? (SHOWCARD 2)

Visit inside Windsor Castle → → → -01
Visit inside Legoland → → → -02
Ascot Racecourse → → → -03
Windsor Racecourse → → → -04
Visit inside Frogmore House & Gardens → -05
See the soldiers marching → → -06
Dorney Court → → → -07
Visit inside Savill Garden → → -08
Visit Windsor Great Park/ Long Walk → -09
Look around Eton → → → -10
Stanley Spencer Gallery → → -11
Visit Guildhall Museum → → -12
Windsor Farm Shop → → → -13
River Thames → → → -14
Runnymede/Magna Carta → → -15
Take an open top bus tour → → -16
Take a guided walking tour → → -17
Take a river boat excursion/ Duck Tour → -18
Hire a rowing boat → → → -19
Take a horse-drawn carriage ride → -20
Café/restaurant/pub → → → -21
Arts/music venue/Theatre Royal → -22
Parks and gardens near river → → -23
Shops → → → → -24
Swimming/Leisure Centre → → -25
Follow the Queen's Walkway → → -26
International event(s) → please specify below → -27
Which event(s)? ....
....

15a. If Windsor Castle and/or Legoland NOT circled above please ask 'why aren't you visiting ...?'

W - ....
L ....

- 34 -

16. We are interested in your opinion of various aspects of your visit to Windsor. On this scale of 1 to 5, where 1 is 'very poor' and 5 is 'very good' (SHOWCARD 3a), how would you rate your overall satisfaction with the following: ROTATE ORDER OF ASKING TICK START POINT

1 – Very poor → 2 – Poor → 3 – Average
4 – Good → → 5 – Very good → 6 – Don't know

Visitor attractions & other places to visit: ···Tick if didn't use ☐

- range	-1	-2	-3	-4	-5	-6
- quality of service	-1	-2	-3	-4	-5	-6
- value for money	-1	-2	-3	-4	-5	-6

Places to Eat & Drink: → → Tick if didn't use ☐

- range	-1	-2	-3	-4	-5	-6
- quality of service	-1	-2	-3	-4	-5	-6
- value for money	-1	-2	-3	-4	-5	-6

Shops: → → → → Tick if didn't use ☐

- range	-1	-2	-3	-4	-5	-6
- quality of the shopping environment	-1	-2	-3	-4	-5	-6
- quality of service	-1	-2	-3	-4	-5	-6

Ease of finding way around:

- road signs	-1	-2	-3	-4	-5	-6
- pedestrian signs	-1	-2	-3	-4	-5	-6
- display maps & info. boards	-1	-2	-3	-4	-5	-6

Public toilets: → → → Tick if didn't use ☐

- availability	-1	-2	-3	-4	-5	-6
- cleanliness	-1	-2	-3	-4	-5	-6

Cleanliness of streets	-1	-2	-3	-4	-5	-6
Upkeep of parks & open spaces	-1	-2	-3	-4	-5	-6

Overall impression of Windsor in terms of: → →

- general atmosphere	-1	-2	-3	-4	-5	-6
- feeling of welcome	-1	-2	-3	-4	-5	-6

17. → Have you been into the Visitor Information Centre in Windsor during your visit?
→ Yes → -1···Go to Q18 →
→ No → -2···Go to Q19

18. → How would you rate the Visitor Information Centre on a scale of 1 to 5 where 1 is 'very poor' and 5 is 'very good' (SHOWCARD 3a), in terms of:

	Very Poor	Poor	Ave	Good	Very Good	Don't Know
Ease of finding	-1	-2	-3	-4	-5	-6
Quality of service	-1	-2	-3	-4	-5	-6
Usefulness of info. received	-1	-2	-3	-4	-5	-6

19. → Thinking about your visit to Windsor, how far would you agree or disagree with the following statements on this scale: (SHOWCARD 3b – ROTATE ORDER OF ASKING – tick start point)

1 – Disagree strongly → → 4 – Agree
2 – Disagree → ·· → 5 – Agree strongly
3 – Neither Disagree nor Agree → 6 – Don't know

Windsor is not too overcrowded	-1	-2	-3	-4	-5	-6
I feel quite safe from crime in Windsor	-1	-2	-3	-4	-5	-6
As a pedestrian in Windsor I feel quite safe from traffic	-1	-2	-3	-4	-5	-6

20a. → How would you rate the overall enjoyment of your visit to Windsor? (READ LIST)

→ Very low → → -1 → High → → -4
→ Low → → -2 → Very high → → -5
→ Average → → -3 → Don't know → -6

20b. → So far this visit, would you say Windsor has ..... (READ OUT)

→ Met your expectations → → -1 →
→ Failed to meet your expectations → -2 →
→ Exceeded your expectations → → -3 →

21. → What did you like most about Windsor?

DO NOT PROMPT – circle any responses mentioned or write in the space provided

The Castle →	→	→	→	→	-01
History/ heritage/ historic town →		→		→	-02
The atmosphere/ ambience of the town →		→		→	-03
The shops →	→	→	→	→	-04
The river →	→	→	→	→	-05
Attractive town/ scenic →		→		→	-06
The buildings/ architecture →		→		→	-07
Plenty to see and do →		→		→	-08
Good restaurants/ eateries →		→		→	-09
Traditional / quaint / 'olde worlde' →		→		→	-10
Friendly/ welcoming →	→	→		→	-11
Other (specify below) →	→		→	→	-12

→ ....
→ ....

22. → What, if anything, spoilt your visit to Windsor?

DO NOT PROMPT – circle any responses mentioned or write in the space provided

Nothing →	→	→	→	→	-01
The weather →	→	→	→	→	-02
Other (specify below) →	→	→	→	→	-03

→ ....
→ ....
→ ....

23a→ How likely are you to recommend Windsor to someone else? (*READ LIST*)

- → Very unlikely → → -1 ⋯ Go to Q23b
- → Unlikely → → -2 ⋯ Go to Q23b
- → Possibly→ → -3 ⋯ Go to Q24
- → Likely → → -4 ⋯ Go to Q24
- → Very likely → → -5 ⋯ Go to Q24
- → Don't know → → -6 ⋯ Go to Q24

IF 'UNLIKELY' ASK:

23b→ Why do you say that?

→ ....

→ ....

→ ....

ASK ALL:

24.→ Thinking about today as a whole, how much do you expect that you and your immediate party will have spent today and this evening in total in Windsor on the following:

- → Eating & drinking → → → £...............
- → (in cafes, pubs, restaurants, hotels etc.)

- → Put "0" if spent/expect to spend nothing
- → Tick box if Don't know/Can't recall/Declined to say ☐

- → Shopping→ → → → £...............
- → (including souvenirs, guidebooks, clothes,
- → sweets, drinks, food, other purchases)

- → Put "0" if spent/expect to spend nothing
- → Tick box if Don't know/Can't recall/Declined to say ☐

- → Entertainment → → → £...............
- (including admissions to attractions, theatre/cinema tickets, guided tours etc.)

- → Put "0" if spent/expect to spend nothing
- → Tick box if Don't know/Can't recall/Declined to say ☐

- → Travel & transport in Windsor → £...............
- → (including fuel, fares, car parking charges)

- → Put "0" if spent/expect to spend nothing
- → Tick box if Don't know/Can't recall/Declined to say ☐

25.→ How many people do these amounts cover?

☐ People

26.→ Including yourself, how many people in your immediate party are male and female, and which of these age groups do they fall into?

→ (*SHOWCARD 4a – WRITE IN NUMBERS*)

	Age	Male	Female	
A	0-15			
B	16-24			
C	25-34			
D	35-44			
E	45-54			
F	55-64			
G	65-74			
H	75+			
Declined -1				

27.→ Are you part of an organised group or coach party?
→ Yes → -1 → No → -2

28.→ Which of the following categories applies to the chief income earner in your household? → (*SHOWCARD 4b*)

Employed full-time (30+ hrs per week)→ ⋯1 ⋯ Go to Q28
Employed part-time (8-29 hrs per week) ⋯2 ⋯ Go to Q28
Self-employed → → → ⋯3 ⋯ Go to Q28
Retired → → → ⋯4 ⋯ Go to Q28
Full-time student living at home → ⋯5 ⋯ Go to Q28
Full-time student living away from home ⋯6 ⋯ Go to Q29
Unemployed → → → ⋯7 ⋯ Go to Q29
→ Declined → → → ⋯⋯⋯⋯-8 ⋯

29.→ What is/was the principal occupation of the chief income earner in your household in terms of:

→ Industry/type of company

→ ....

→ Position/job title and grade/skill level where appropriate

→ ....
→ If "manager", how many employees responsible for

→ ....

IF UK RESIDENT ASK:

30.→ What is your postcode?

→ ....

→ NB Please ask for FULL POSTCODE. This will only be used to map where visitors come from. It will not be passed to any third party or used for any other purpose.

31.→ Finally, could I have your name and email address OR telephone number? I should emphasise that this information will be treated in the strictest confidence and will only be used for the purpose of verifying the interview.

Name of respondent: _____

Email: _____

Home Tel No: _____

THANK YOU FOR YOUR TIME