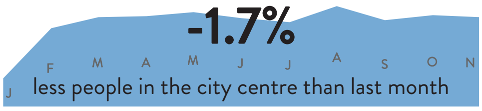
WHO IS THE BATH VISITOR?

November 2019



less people in the city centre than last month

Female	Male
61.9%	38.1%

HIGHLIGHTS

All demographic data is representative of UK residents only, except where noted.

Age group rankings have changed slightly again since October 2019; the 65+ age group is now the top age group at nearly 14% of November 2019 city centre users. This month, the proportions of residents and visitors appear to mirror each other, that is, as the percentage of visitors in the city centre rises, the percentage of residents decreases an almost equal amount. However, the actual numbers of residents in the city does hold steady at around 4~5,000.

18 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55 - 59	60 - 64	65+
10.6%	9.4%	8.4%	7.7%	8.5%	12.3%	12.9%	10.6%	5.9%	13.7%

Who tends to spend the most?[2]

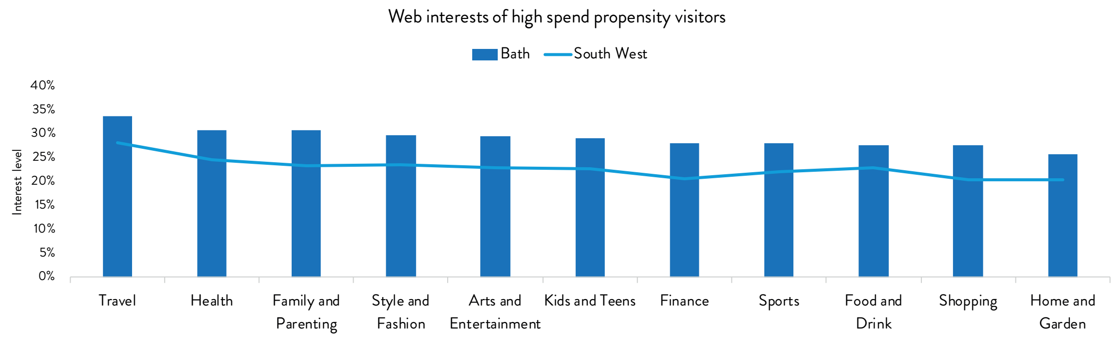
All demographic data is representative of UK residents only, except where noted

High	Mid	Low
53.3%	24.8%	21.9%

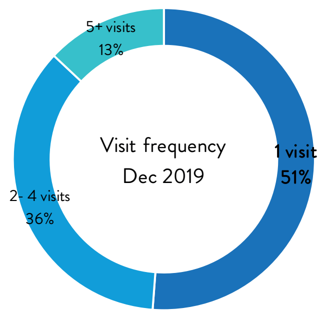
3.7% Workers

30.9% Residents

65.4% Visitors



	18-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65+
40% Female	3.8%	3.8%	3.2%	2.8%	3.2%	4.5%	5.2%	4.4%	2.8%	6.4%
25.3% Male	2.6%	2.5%	2.0%	1.8%	1.9%	2.9%	3.3%	2.8%	1.8%	3.8%



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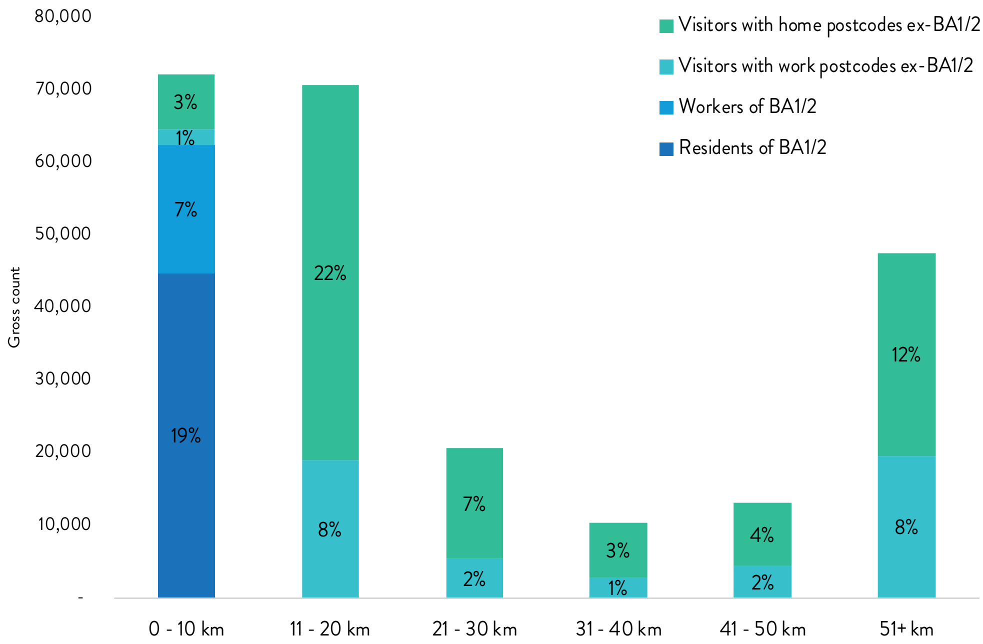
How far do people come from?[3]

Based on UK postcode distance from BA1 1. All demographic data is representative of UK residents only, except where noted.

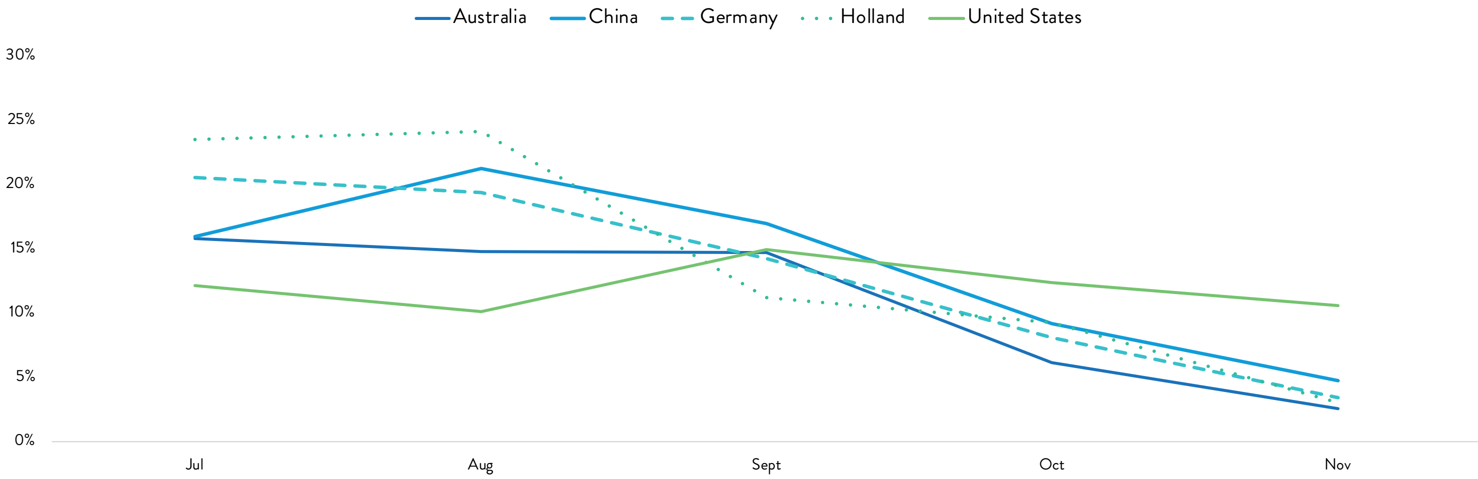
While majority of city centre users still came from with 20km away, Nov 2019 saw great increases in the numbers of visitors from further away. Compared to Oct 2019, visitor numbers from 21 - 30 km away increased by 19%, 31 - 40 km away by 40%, 41 - 50 km away by 63% and 51+ km away by 52%.

Swindon postcodes appear as a top postcode in all distance categories with increases in visitors. Other top areas include Dorset, Plymouth, Taunton, Yeovil, Street, Wells and Cardiff.

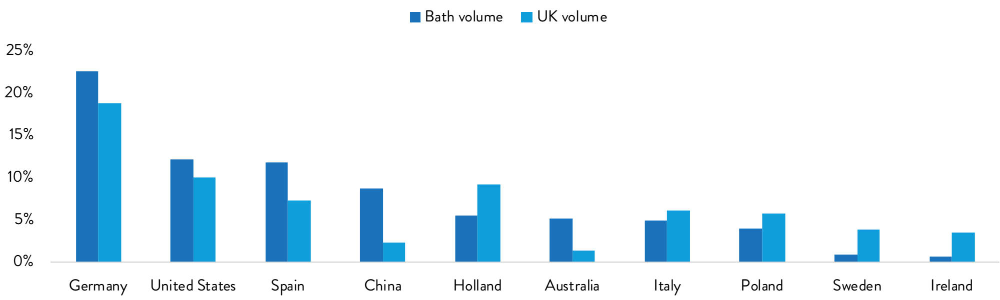


International visitors 5-month trend[4]

(countries where Bath performed the strongest in Sept 2019)



Top 10 countries in the city centre (Sept 2019)[5]



Overall, July/August appear to be the most preferred months for international visitors to come to Bath. This pattern is not different for the top countries where Bath outperforms the UK in attracting visitors, although the decline is not as steep for American visitors.

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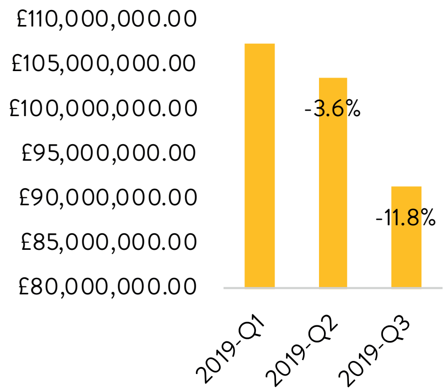
SPEND IN Q3 (JUL - SEPT 2019)

All spend analyses are representative of VISA card use only (approximately 1 in £2.12 market share)

Total spending by UK nationals in BA1 and BA2 is down almost 12% in Q3 compared to Q2. In terms of how this £90M has been spent overall, the top 4 remain the same as in previous quarters (Restaurants, Clothing, Other Retail and Accommodation). However, spend on Health-related items (e.g. pharmacies, private medical services) has dropped below the top 5, being replaced by spending in Business & Professional Services.

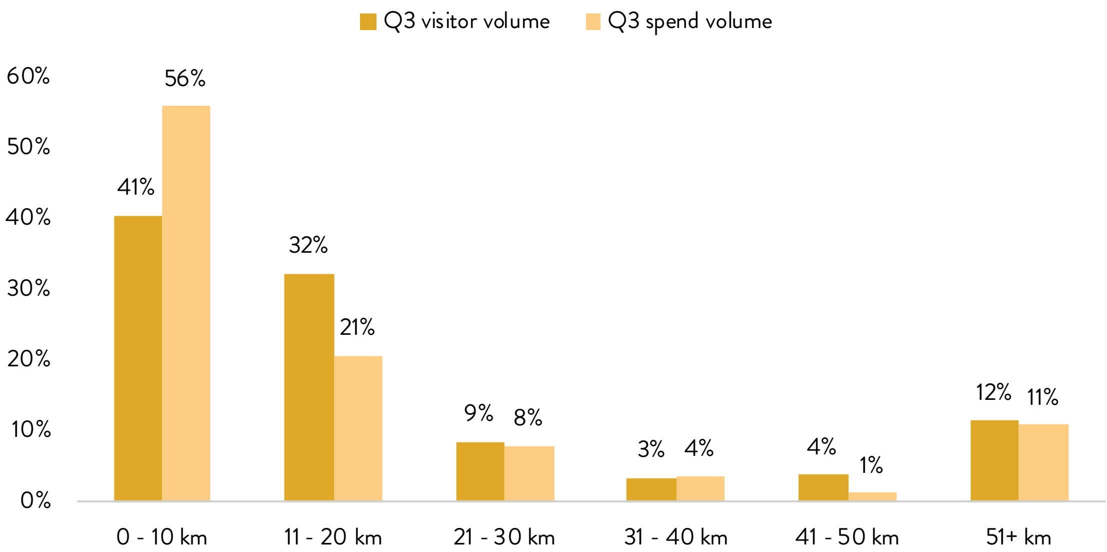
41% of Q3 city centre users came from within 10 km of BA1 1, but they account for 56% of the total spend in BA1 and BA2. This spending, an estimated £51M, has mostly gone towards Restaurants, Supermarkets and Other Retail (e.g. gifts/cards/hobby stores, art galleries, bookstores, sporting goods, jewelry stores).

Total spend in BA1+BA2

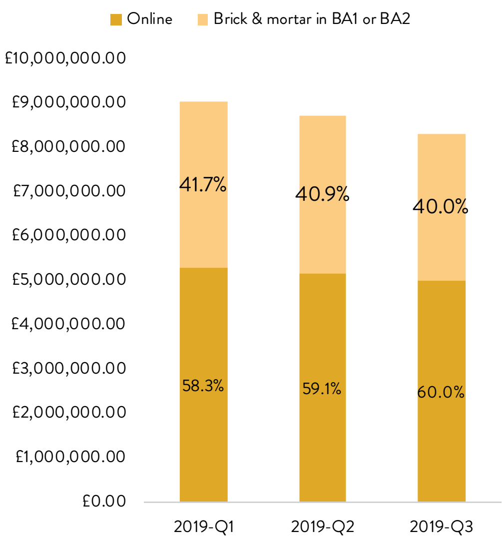


The people who spend the most in BA1+BA2 are the people who live in BA1 or BA2; e.g. residents of BA2 have spent around £14M in Q3. Excluding these residents, the next highest spenders mostly live in the immediate neighbouring areas (Radstock, Bradford-on-Avon, Saltford/Keynsham) but also around Chippenham, Trowbridge and Frome.

How far do our city centre users come from vs how much they spent in Q3



Online/offline spend by residents of BA1/BA2[6]



How did people like to spend in BA1/BA2?

All spend analyses are representative of VISA card use only (approximately 1 in £2.12 market share)

Spend Category	Total Spend	Avg Transaction Amt
Restaurants	£18.3M	£13
Clothing	£15.7M	£30
Gen. Retail & High Street	£7.1M	£29
Hotels / Accommodation	£3.0M	£68
Bus. & Prof. Services	£2.4M	£99

Home distance from BA1 1	Top 3 Spend Categories		
lives in BA1 or BA2	Restaurants	Supermarkets	Other Retail
0 - 10 km	Restaurants	Supermarkets	Other Retail
11 - 20 km	Restaurants	Supermarkets	Clothing
21 - 30 km	Restaurants	Clothing	Supermarkets
31 - 40 km	Restaurants	Clothing	Other Retail
41 - 50 km	Restaurants	Clothing	Other Retail
51+ km	Restaurants	Supermarkets	Clothing

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Background: about the data and limitations

Visitor profiling aims to supplement footfall information and understand 'who is the Bath visitor'. This is a novel dataset. Currently, this level of localised demographic information is only available for Bath (BA1/BA2; Courtesy of the Bath BID). Data collection started in late January 2019.

Demographic information is generated from mobiles connecting to the local O2 network. O2 is the second largest network operator in the UK. Advanced modelling is applied to extrapolate volumes to all presence in Bath, not just those on the O2 network. All data is anonymised and aggregated to protect individual privacy (GDPR compliant). For this reason, the availability of data on the visitor segments varies, e.g. age grouping is available daily but not hourly and postcode groupings are only available monthly.

International tourist information is also generated from O2. However, detection is dependent on foreign devices roaming on the network and roaming agreements can change daily. If a certain volume is presented (from any country), it will not include foreign devices roaming on non-O2 networks. We therefore benchmark against UK figures giving a more useful dataset. With regards to the volume of domestic vs international visitors, the latest estimate is that about 5% of Bath's city centre users are international tourists.

Local spending information comes from VISA. This data is available on a quarterly basis, due to cardholder privacy, as well as market sensitivity. Information on the local spending patterns of international tourists is not currently available.

Bespoke reports and further information are available to levy payers on request.

Chart Footnotes

1 Because of data collection methods, this chart measures UK mobiles only. Footfall will include international visitors in measuring the volume of people in the city centre, but it involves a degree of double-counting. For this reason, it is not appropriate to directly interpret gross footfall numbers as "number of people", whereas we can get closer to the unique number of people using mobile counting.

2 Spend power here conveys propensity to spend, e.g. high spend powers are more likely to spend disposable income. This is modelled on a combination of several measures (e.g. mobile device cost and frequency of upgrades, home location, frequency and distance from home of holidays).

3 So far, the distance category breakdowns are consistent month-on-month, as shown. About 70% of Bath city centre users come from home postcodes within 20 km away from BA1 1, with the proportion of BA1/BA2 residents using the city centre being similar to the proportion of people from 11 - 20 km away.

4 Monthly volumes expressed as an index (volume from country ÷ all-time (i.e. from start of data collection) volume from country).

5 This data is on a 2-month delay. Although the local volumes are available monthly, the national volumes take time to collate.

6 'Online' includes spending worldwide and where a 'brick & mortar' offering is not available, e.g. Amazon, notonthehighstreet.com and therefore will be naturally inflated. Offline spend includes only the spend with merchants in BA1 and BA2. The latest national statistic is that £1 in every £5 is spent online.

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