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1. INTRODUCTION

1.1 Background

This report presents the findings of a survey of visitors to Southampton City Centre conducted between November 2008 and January 2009. The survey was commissioned by Southampton City Council and undertaken by the Research Unit at Tourism South East.

Christmas is typically the largest annual economic stimulus for the economies of celebrating nations. Sales increase dramatically in almost all retail areas, as people purchase gifts, decorations, and supplies for parties and for visiting guests whilst the run-up of Christmas offers a boost to the takings of hospitality businesses through the office Christmas party season. The economic aspects of Christmas continue after the holiday, with Christmas sales and New Year's sales, when stores sell off goods that were not sold before Christmas.

The assess the performance of Southampton's City Centre businesses over the seasonal Christmas and January sales period, Southampton City Council commissioned TSE Research to carry out a survey of spending behaviour among City Centre shoppers over the festive season. The first study was conducted over November 2007 to January 2008 and established that approximately 7 million people visited the City Centre over this period specifically for Christmas or post Christmas sales shopping and spent somewhere in the region of £585 million on goods and services.

To establish trends in performance, TSE Research were invited to repeat the exercise for the 2008 Christmas and January sales period. This time round the survey had an additional impetus in view of the 'credit crunch'. The impact of the economic downturn on the retail sector has been well documented. The results of the survey would therefore provide key indicators of the impact of the credit crunch on consumer spending in the City Centre.

1.2 Objectives

The objectives of the 2008/09 Southampton Christmas Economy Survey were as follows:

- To establish average expenditure on Christmas shopping
- To assess relative importance of Christmas shopping compared to other purposes of trip
- To identify competitor shopping destinations
- To compare spending patterns to previous survey

In addition to the above objectives, in this years survey, visitors were also asked questions about the temporary ice rink in the City in order for the Council to assess shoppers awareness and use of the ice rink.

1.3 Methodology

In order to meet the above research objectives a face to face questionnaire survey was carried out by experienced TSE interviewers between 17th November and 3rd January 2009. A copy of the questionnaire used can be found in Appendix 1. Adults were sampled on a random basis at four key locations in the city, with the interview schedule including weekday and weekend sessions. The interview locations were:

- Outside Primark
- Outside Zavvi Megastore
- Outside West Quay
- Outside The Mall

In total 18 interview sessions, each lasting for approximately 3 hours, were undertaken, resulting in a total of 409 completed interviews. Interview sessions were conducted between the hours of 10am and 4pm. 41% (169) of interviews were conducted on weekend days and 59% (240) were conducted on weekdays. To ensure consistency with the previous year's survey, the same interview days were used as in 2007/08.

62% of interviews were gained outside Primark, 18% were from outside The Mall, a further 11% were from outside West Quay and the remaining 10% were from outside Zavvi Megastore.

Table 1: Sample by interview location

Location	Sample (%)
Outside Primark	253 (62)
Outside The Mall	72 (18)
Outside West Quay	45 (11)
Outside Zavvi Megastore	39 (10)
Total	**409 (100)**

In order to ensure consistency with the 2007/08 survey, a filter card was used to exclude those who would not be purchasing any goods or services, as well as those whose visit concerned their normal household shopping.

In total 1253 people were approached to be interviewed. Of these, 746 people refused to participate in the interview, 40 people said that they would not purchasing any goods or services during their visit that day and a further 58 people were doing general household shopping; leaving the remaining 409 people that participated in the survey.

1.4 Statistical Reliability

All sample surveys are subject to statistical error that varies with the sample size. If a survey has a sample of 409 then the margins within which one can be 95% certain that the true figures will lie within are presented below:

Sample = 409	Result (%)	95% Confidence Interval +/-
	10 or 90	2.9
	20 or 80	3.9
	30 or 70	4.4
	40 or 60	4.7
	50	4.8

This means, for example, we can be 95% certain that if 20% of the sample is found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies in the range of +/- 3.9% i.e. between 16.1% and 23.9%.

The margins of error shown above should be borne in mind when interpreting the results contained in this report.

1.5 Presentation of Results

The key findings are presented under the following headings:

- Profile of visitors
- Origin of visitors
- Characteristic of visit
- Visitor expenditure
- Visitors' opinions on ice rink
- Economic impact assessment

Key findings generally refer to all visitors, although commentary is provided where there is a significant difference between visitor types (eg. day and staying visitors, and local residents).

1.6 Definitions

For the purpose of this report, visitors to Southampton are divided into three main types:

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

'Staying visitors' – visitors staying overnight in accommodation in Southampton/Southsea.

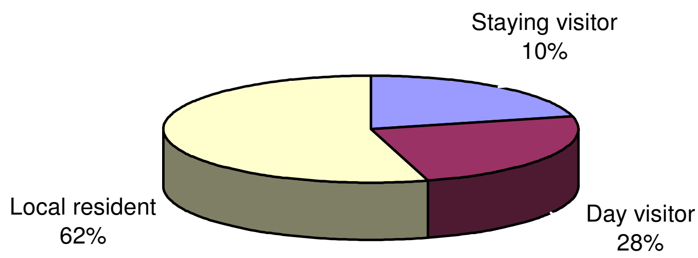
'Local residents' – visitors whose home postcode begins with 'SO'.

2. PROFILE OF VISITORS

2.1 Visitor Type

Out of 409 visitors that were interviewed, 255 (62%) were local residents. A further 113 (28%) were visiting for the day from locations outside of Southampton and 41visitors (10%) were staying overnight in commercial or non-commercial accommodation in Southampton.

Figure 1: Type of visitor 2008/09



When compared with results from the 2007/08 survey, the proportion of staying visitors interviewed has increased (6% in 2007/08).

2.2 Group Size and Composition

The 409 respondents to the survey represent 409 separate visitor groups. All of these visitor groups answered the question on the number of people in their immediate party. Contained in these visitor groups are a total of 903 individuals. Table 2, below, provides average group sizes broken down by visitor type.

Table 2: Average group size – by visitor type

	Average number of people per group		
	Adults	Children	Total
Local residents	1.78	0.27	2.05
Day visitors	2.26	0.15	2.41
Staying visitors	2.61	0.37	2.61
All visitors	1.96	0.25	2.21

The average size of groups surveyed was 2.21 people (1.96 adults and 0.25 children). Staying visitors averaged the largest group size at 2.61 people and also contained the largest proportion of children at 0.37 per visitor group.

83% of groups to Southampton contained adults only (82% in 2007/08). Just under half of the groups overall (48%) were groups of two adults (43% in 2007/08). 24% of all groups contained a single adult (32% in 2007/08).

Only 17% of groups to Southampton contained children. As in 2007/08, the largest proportion of these contained two adults and one or more children (see Table 3 below).

When split by visitor type, staying visitors were far more likely to have children with them (24%), followed by local residents, where 18% of all groups contained one or more children. Only 13% of day visitor groups contained children.

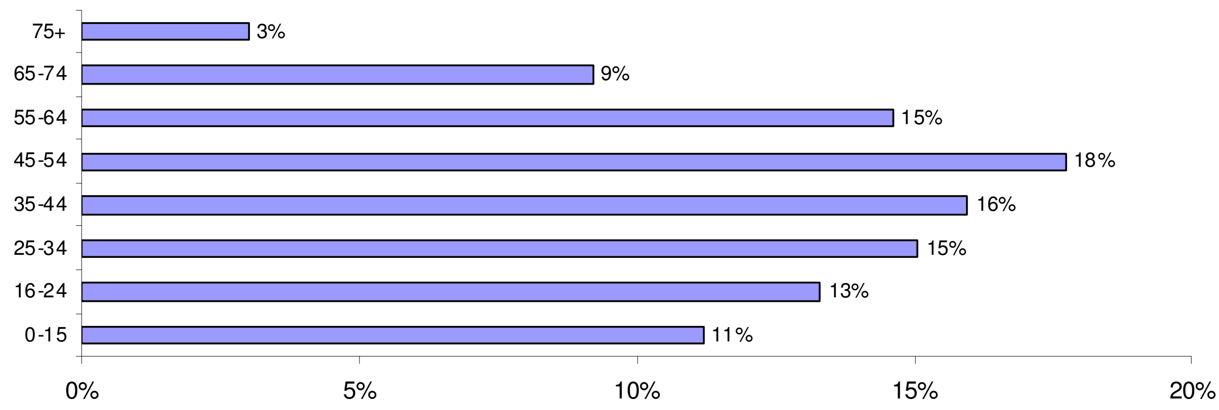
Table 3: Group composition

Group Composition – all visitors	Count	%
One Adult	96	24
Two Adults	197	48
Three Adults	29	7
Four Adults	10	2
Five + Adults	6	1
Adults Only	**339**	**83**
One adult and one child	12	3
One adult and two or more children	2	<1
Two adults and one child	19	5
Two adults and two or more children	16	4
Three adults and one child	12	3
Three adults and two or more children	3	1
Four or more adults with one or more children	1	1
Adults and Children	**70**	**17**
Total	409	100

2.3 Age and Gender Profile

Overall, 89% of visitors were adults and 11% were children aged 15 or under, the same proportions as in 2007/08.

Figure 2: Age Profile



The largest proportion of visitors forming part of the visitor groups interviewed fell into the 45 to 54 age category (18%), followed by the 35 to 44 age bands (16%). A further 15% of visitors were aged between 55 and 64and 25 and 34, and 13% between 16 and 24 years. The 65 to 74 year age group contained 9% of visitors and only 3% were in the 75+ age band.

Comparison data from the 2007/08 survey (Table 4) confirms the tendency of visitors to Southampton to be from middle age groups, with 49% of total visitors being aged between 35 and 64 years (52% in 2007/08).

Table 4: Age and gender profile

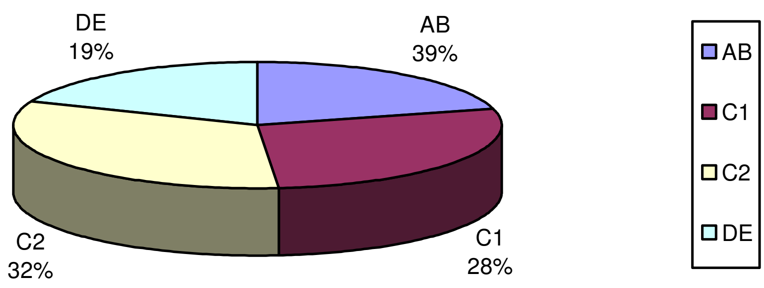
	Southampton (All visitors 2008/09) %	Southampton (All visitors 2007/08) %	Local residents %	Day visitors %	Staying visitors %
0-15 years	11	11	13	6	14
16-24 years	13	15	15	14	6
25-34 years	15	12	16	10	21
35-44 years	16	17	14	21	12
45-54 years	18	19	15	22	21
55-64 years	15	16	14	14	20
65-74 years	9	8	9	11	5
75+ years	3	2	4	2	1
Males	46	30	44	47	56
Females	54	70	56	53	44

When split between visitor types, the only noticeable difference is that there are slightly more children visiting Southampton on a staying visit or as a local resident, whilst there are higher numbers of older visitors visiting on a day trip.

2.4 Socio-Economic Profile

The socio-economic profile of visitors to Southampton is based on the occupation of the households highest income earner and takes into account the previous occupation of those who were retired.

Figure 3: Socio-economic profile 2008/09



49% of visitors fell into the more affluent ABC1 socio-economic profile. With 21% falling into the most affluent AB group (professionals, senior and middle managers) who make up 22% of the UK adult population. 28% of visitors were ‘C1s’ (comprising junior managerial and other non-manual occupations) who make up 33% of the UK adult population.

33% of visitors to Southampton fell into the skilled manual worker category (C2), slightly higher than the 25% who make up the UK population. The remaining 19% were in the lowest 'DE' group, compared with a national average of 20% of the UK adult population. These figures illustrate that Southampton appeals to a broad cross section of visitors.

When compared with the results from the 2007/08 survey a far higher proportion from the 'DE' socio-economic classification now appear to visit Southampton (19% in 2008/09 compared with 13% in 2007/08). However, there has been a decrease in the number of visitors who are from the 'C1' category (from 35% in 2007/08 to 28% in 2008/09).

Table 5: Socio-economic profile

	% of UK adult population	Southampton (All visitors 2008/09)	Southampton (All visitors 2007/08)	Local residents	Day visitors	Staying visitors
	%	%	%	%	%	%
AB	22	21	20	19	22	27
C1	33	28	35	26	29	35
C2	25	33	32	30	38	32
DE	20	19	13	25	11	5
Total	100	100	100	100	100	100

3. ORIGIN OF VISITORS

3.1 Place of Residence

The home locations of visitors to Southampton were obtained by finding out their postcode. Nearly three quarters (73%) were from Hampshire, 2% were from overseas and the remaining 25% were found to be from home locations spread throughout the UK. Table 6, below, shows a complete breakdown by county of residence and Table 6a, details the town of residence of those who have come from Hampshire.

Table 6: County of residence

	Count	%
Hampshire	300	73
Isle of Wight	21	5
Dorset	18	4
Wiltshire	17	4
Channel Islands	11	3
Overseas	8	2
Somerset	5	1
Surrey	4	1
West Sussex	4	1
London	3	1
South Wales	3	1
Berkshire	2	<1
Essex	2	<1
Buckinghamshire	1	<1
Cornwall	1	<1
Derbyshire	1	<1
Devon	1	<1
East Sussex	1	<1
Hertfordshire	1	<1
Lincolnshire	1	<1
Merseyside	1	<1
Norfolk	1	<1
North Wales	1	<1
Shropshire	1	<1
Total	409	100

Table 6a: County of residence

	Count	%
Bitterne	58	19
Southampton	55	18
Totton	33	11
Fawley	28	9
Eastleigh	19	6
Warsash	17	6
Winchester	14	5
Romsey	12	4
Hedge End	10	3
Chandlers Ford	7	2
Gosport	6	2
Portsmouth	5	2
Emsworth	4	1
Lymington	4	1
New Milton	4	1
Andover	3	1
Petersfield	3	1
Portchester	3	1
Basingstoke	2	1
Fareham	2	1
North Baddesley	2	1
Stubbington	2	1
Waterlooville	2	1
Brockenhurst	1	<1
Fordingbridge	1	<1
Hayling Island	1	<1
Port Solent	1	<1
Ringwood	1	<1
Total	300	100

4. CHARACTERISTICS OF VISIT

4.1 Main Purpose of Visit

Visitors were asked what the best description for their visit to the town centre that day was. The majority of visitors (86%) were there for a special shopping trip (described as non-regular). This proportion is slightly lower than the previous year when it was 90%. The only other noticeable difference when comparing with the previous year are visitor shopping whilst visiting friends or relatives (6% in 2008/09 compared with 4% in 2007/08).

When looking at breakdowns between visitor types, far fewer staying visitors were there that day for a special shopping trip (51% compared with 91% of local residents and 85% of day visitors). Higher proportions of this group were also shopping with friend or relatives (27% compared with 2% of local residents and 8% of day visitors) and a further 17% were shopping whilst on holiday (3% of day visitors).

The visitors mentioned other reasons for being in town centre that day were asked to name them. Three visitors said they were there for a hospital appointment, one visitor was attending a job interview and one was there as part of a group visit.

Table 7: Purpose of visit to town centre today

	All visitors – 2008/09		All visitors – 2007/08	Local residents	Day visitors	Staying visitors
	Count	%	%	%	%	%
Special shopping trip	350	86	90	91	85	51
Shopping whilst visiting friends/relatives	25	6	4	2	8	27
Shopping whilst on holiday	10	2	1	0	3	17
Shopping trip (regular)	8	2	2	3	0	0
Shopping whist on work break	4	1	1	2	0	0
Shopping whilst here for event/special occasion	4	1	<1	1	0	2
Shopping whilst here on business	2	<1	<1	0	2	0
Christmas meal with friends/relatives	1	<1	1	<1	0	0
Other	5	1	<1	0	3	2

Table 8: Main purpose of shopping today

	All visitors – 2008/09		All visitors – 2007/08	Local residents	Day visitors	Staying visitors
	Count	%	%	%	%	%
Christmas shopping	324	70	86	77	82	83
Post Christmas sales	85	18	10	23	18	17
General household shopping	58	12	4	na	na	na
Total	467	100	100	100	100	100

All respondents were also asked about the nature of their shopping trip to the City Centre that day to establish the proportion of shoppers who were visiting specifically for Christmas/post Christmas sales shopping.

An important finding in this year's survey is that the percent of people shopping specifically for Christmas dropped from 86% last year to 70% this year. On the other hand, the percentage of people stating the post-Christmas sales to be the main purpose of their shopping trip increased from 10% last year to 18% this year.

The survey also found an increase in the percentage of people who reported that they were undertaking general household shopping (an increase from 4% in 2007/08 to 12% in 2008/09).

When split into visitor type, there is no breakdown of those visiting for general household shopping. Christmas shopping is the main purpose of 82% of day visitors and 83% of staying visitors. Whereas Christmas shopping was the main purpose of shopping for only 77% of local residents, with far more local residents being encountered during the January sales.

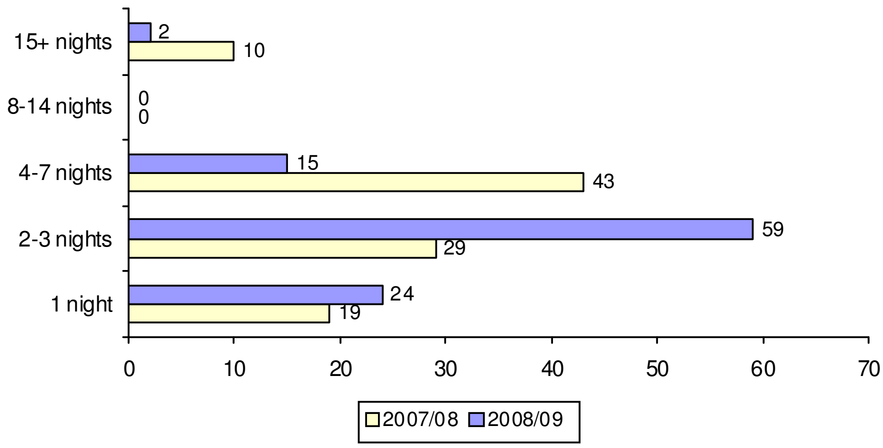
4.2 Length of Visit

4.2.1 Number of nights staying

Staying visitors were asked how many nights they would be staying in Southampton. Nearly two thirds (59%) were staying for between two and three nights (29% in 2007/08). A further quarter (24%) was staying for just one night (19% in 2007/08).

More visitors in 2007/08 were staying for between 4 and 7 nights (43% compared with 15% in 2008/09).

Figure 4: Number of nights staying in Southampton



4.2.2 Number of hours spent shopping

As with the previous year, the majority of visitors (51%) spent between 3 and 4 hours shopping in Southampton (59% in 2007/08).

When split by visitor type, unsurprisingly a far higher proportion (32%) of local residents spent between 1 and 2 hours shopping compared with the other visitor types (9% of day visitors and 20% of staying visitors). High proportions of day and staying visitors spent over 5 hours shopping, making their longer journey to the City centre worth while.

Table 9: Breakdown of length of stay by domestic and overseas visitors

	All visitors 2008/09		All visitors 2007/08	Local residents	Day visitors	Staying visitors
	Count	%	Count	%	Count	%
1-2 hours	99	24	15	32	9	20
3-4 hours	208	51	59	56	44	37
5-6 hours	68	17	22	9	33	22
Over 6 hours	34	8	4	4	14	22

4.3 Reason for Choosing Southampton

Half (50%) of all visitors said their main reason for choosing Southampton to do their shopping over other destinations was its sheer convenience (40% in 2007/08). A further third of all visitors (34%) had chosen Southampton because of the range of shops available, compared with 41% the previous year.

The majority of day visitors (58%) had come to Southampton to do their shopping because of the range of shops available, compared with 24% of local residents and 29% of staying visitors.

The 33 visitors that mentioned other reasons for choosing Southampton to do their shopping were asked to specify the reason – 22 visitors said it was because they have family living in the area; 8 came because of a specific shop; and 3 said they come every year but did not specify why.

Table 10: Reason for choosing Southampton

	All visitors – 2008/09		All visitors – 2007/08	Local residents	Day visitors	Staying visitors
	Count	%	%	%	%	%
Sheer convenience (work/live close by)	203	50	40	71	16	10
Range of shops available	139	34	41	24	58	29
Curiosity	10	2	3	0	5	10
Enjoy the ambience of the place	8	2	3	1	4	2
All the special offers available	7	2	1	2	2	2
Highly recommended	5	1	2	0	4	2
Like the German market	2	<1	1	0	2	0
Easier to park here than other places	2	<1	<1	0	2	0
Other	33	8	8	2	8	44

4.4 Other Destinations Considered for Shopping

42% of visitors said that they had not considered doing their Christmas or January sale shopping elsewhere. Those visitors who said they had considered other destinations were asked which destinations they had considered visiting or had already visited. A list of fourteen relatively local destinations was shown to these interviewees to choose form as well as being given the option to name the alternative destination. Table 11, below, lists those destinations mentioned by more than 10 visitors. Appendix 2, lists all other destinations mentioned.

Table 11: Other destinations considered for shopping

Destination	Count	%
Portsmouth	56	24
Eastleigh	34	14
Winchester	33	14
Bournemouth	28	12
Fareham	28	12
Salisbury	24	10
Basingstoke	21	9
Central London	16	7
Chichester	14	6
Isle of Wight	11	5
Other	76	32

4.5 Sources of Information Used to Influence Visit

Visitors were presented with a list of sources of information and asked to identify whether any had influenced their decision to visit Southampton that day.

Over three quarters (74%) of all visitors had used no information prior to their visit (72% in 2007/08). A further 15% had been given information from members of their family, friends or work colleagues (14% the previous year).

Table 12: Level of influence on decision visit

	All visitors – 2008/09		All visitors – 2007/08	Local residents	Day visitors	Staying visitors
	Count	%	%	%	%	%
Used no information	301	74		79	70	46
Family/friends/colleagues	60	15		8	18	49
Television advertisement	34	8		10	8	0
Newspaper/magazine advertisement	7	2		2	1	0
Leaflets/Brochures	6	1		1	2	2
Website or web advertisement	6	1		2	1	2
Posters	4	1		2	0	0
Radio advertisement	3	1		1	0	0
Other	10	2		2	4	2

Ten visitors mentioned other sources of information that were used – specific shop promotions (5 visitors); the German market (2 visitors); Red Jet offer (1 visitor); information on coach trip (1 visitor); and the Yellow Pages (1 visitor).

5. VISITOR EXPENDITURE IN SOUTHAMPTON

5.1 All Visitor Spend

Table 13, below, shows the average expenditure of all visitors to Southampton (per person, per 24 hours) compared with the results from the 2007/08 survey. Figures are broken down by category of spend – shopping, eating out, travel (fares, parking charges, fuel, etc) paid for in the city and entertainment (including admissions to attractions, sports, guided tours, etc).

Table 13: Average expenditure in Southampton – All visitors (£/per person/per 24 hours)

Category of expenditure (£)	Average spend (£) all visitors (2008/09)	Average spend (£) all visitors (2007/08)
Eating out	6.14	6.38
Shopping	72.37	71.74
Travel	2.97	2.53
Entertainment	0.59	0.73
Other	0.52	1.47
Average spend total	**82.59**	**82.85**

The total average spend per person per 24 hours is £82.59, showing little change overall when compared with the survey results from the previous year (£82.85).

However, there is slight variation in where money has been spent. Visitors interviewed in this year spent slightly more per person on shopping and travel compared to the previous year. Expenditure on eating out and entertainment has decreased slightly.

5.2 Visitor Spend by Visitor Type

Unsurprisingly, the average spend per 24 hours by local residents at £65.32 per person is the lowest of the three visitor types. The staying visitor spend per 24 hours is the highest amongst the visitor types and at £126.14 is double that of local residents.

Day visitors and staying visitors spent significantly more per person on eating out and travel than local residents. As would also be expected, staying visitors spent more per person per 24 hours on entertainment compared to the other two visitor types.

All three visitor types had high spend on shopping, with local residents averaging £58.32 per person per 24 hours. However, day visitors spend on shopping was £88.78 per person and staying visitors was almost double the local resident spending at £104.67 per person per 24 hours.

Table 14: Average expenditure in Southampton – by visitor type (£/per person/per 24 hours)

Category of expenditure (£)	Average spend (£) Local residents	Average spend (£) Day visitors	Average spend (£) Staying visitors
Eating out	4.60	7.56	10.48
Shopping	58.32	88.78	104.67
Travel	1.99	4.56	4.33
Entertainment	0.28	0.56	2.23
Other	0.13	0.00	4.43
Average spend total	**65.32**	**101.46**	**126.14**

6. VISITORS' OPINIONS ON ICE RINK

6.1 Awareness of Ice Rink

Three quarters (75%) of all visitors were aware that there was an ice rink in Southampton. When split by visitor type, 85% of staying visitors were aware there being an ice rink in Southampton compared with 58% of local residents.

Table 15: Awareness of ice rink

	All visitors – 2008/09		Local residents	Day visitors	Staying visitors
	Count	%	%	%	%
Aware of ice rink	306	75	85	58	61
Unaware of ice rink	103	25	15	42	39

6.2 How Heard of Ice Rink

Those visitors that were aware of an ice rink being in Southampton for the festive period were asked how they had been made aware. A quarter (23%) said it was through word of mouth. When split by visitor type nearly half of all staying visitors (48%) had heard about the ice rink this way, compared with 20% of local residents and 25% of day visitors.

Other significant sources of information about the ice rink were reading The Echo (22% of local residents) and posters (12% of staying visitors).

Table 16: How heard of ice rink

	All visitors – 2008/09		Local residents	Day visitors	Staying visitors
	Count	%	%	%	%
Base	305		216	64	25
Word of mouth	71	23	20	25	48
The Echo	51	17	22	3	4
Radio	25	8	8	9	4
Poster	24	8	8	6	12
Leaflet	15	5	6	3	0
Internet	3	1	1	2	0
Other	142	47	46	53	36

47% of all visitors (142 interviewees) had heard about the ice from other sources than those listed above. The most popular sources mentioned were that they had seen it when passing by (64 interviewees) or had seen it on television (40 interviewees).

Those visitors who had seen a poster or leaflet advertising the ice rink were asked where they had seen it. The 32 visitors that responded mentioned fifteen different locations, the most popular of which was the Civic Centre. A full list can be seen in Appendix 3.

6.3 Organiser of Ice Rink

Those visitors that were aware of the ice rink were asked who they thought the organiser was. The majority (65%) thought that it was Southampton City Council. A third of respondents (29%) did not know who the organiser was.

Table 17: Organiser of ice rink

	Count	%
Southampton City Council	200	65
Cousins Entertainment	8	3
A combination of both of the above	3	1
Ocean FM	2	1
Rank	1	<1
A charity	1	<1
Private company	1	<1
Wave 105	1	<1
Don't know	89	29
Total	306	100

6.4 Usage of Ice Rink

Visitors that were aware of the ice rink in Southampton were asked whether they, or a family member, had used or intended to use the ice rink whilst it was there. 21% of all visitors had used the ice rink and a further 8% said that they intended to use the ice rink.

Table 18: Usage of ice rink

	All visitors – 2008/09		Local residents	Day visitors	Staying visitors
	Count	%	%	%	%
Yes	63	21	24	14	8
No	220	72	67	82	88
Intend to	23	8	9	5	4

When split by type of visitor, 33% of local residents had used or intended to use the ice rink, compared with 19% of day visitors and 12% of staying visitors.

All visitors were asked if they would use the ice rink if it came back to Southampton in 2009. 37% said they would definitely use the ice rink, 51% said that they would not use it and 12% were unsure. When split by visitor type, 42% of local residents said that they would use the ice rink in 2009, compared with 27% of day visitors and 32% of staying visitors.

6.5 Comments

Visitors who were aware of the ice rink were given the opportunity to comment on it. 135 visitors made an unprompted comment. Of these, 51% (70 visitors) felt that it was a great idea. A further 25% (34 visitors) said that it should be in Southampton all the time – not just at Christmas.

Table 19, overleaf, lists all unprompted comments about ice rink.

Table 19: Comments on the ice rink

Base - 135	Count	%
Great idea	70	51
Have it here all the time	34	25
Good for children	13	10
Too expensive	10	7
Skating surface is not good	3	2
Could be bigger	2	1
Better advertising	2	1
It brings people to Southampton	2	1
Concessions for locals	1	1
Looked lovely at Christmas	1	1
Needs to be more central	1	1
Boots are uncomfortable	1	1
Very dirty	1	1
Doesn't look very good	1	1
Session timings not good	1	1
Overbooking problems	1	1

7. ECONOMIC IMPACT ASSESSMENT

7.1 Direct impacts

In this section of the report we present the gross expenditure generated by Southampton City Centre shoppers over the Christmas and post Christmas sales period.

This year's survey established that the average expenditure per person on eating out, shopping, entertainment, travel and 'other' items was £82.59 per person, almost exactly the same level as last year.

To estimate total Christmas/post Christmas sales expenditure in the City Centre, footfall data for the main two shopping malls in Southampton was obtained (West Quay and The Mall). The two shopping centres reported that approximately 6.6 million shoppers visited over the months of November and December 2008 and January 2009. Overall this represents a drop of 10% in footfall.

Table 11: City Centre Retail Footfall

	2008/9	2007/8	% difference
November	1,965,558	2,364,902	-17%
December	2,924,118	3,242,742	-10%
January	1,723,928	1,750,415	-2%
Total shoppers	6,613,604	7,358,059	-10%
Of which specifically doing Christmas or post Christmas shopping	*5,819,972 (88%)*	*7,063,737 (96%)*	

An estimate of total expenditure can be calculated by simply multiplying total footfall with average spend per head per trip. However first of all we need to deduct from our calculations that proportion of shopping trips which was not specifically for Christmas/post Christmas shopping. The survey found that 88% of all shoppers were Christmas/post Christmas shopping, 12% were shopping for other purposes.

Based on this finding, it is estimated that out of the total of 6,613,604 shoppers, approximately 5,819,972 were Christmas/post Christmas shoppers, overall 18% fewer Christmas/post Christmas shoppers than 2007/08.

Based on the average spend per head figure, it is estimated that approximately £480.6 million was generated through purchases made by Christmas and post-Christmas/January sales shoppers, representing a drop of 18% in the total value of expenditure.

Table 12: Expenditure over Festive season

	Estimated no. of Christmas/post Christmas shoppers			Estimated total spend by month		
	2008/9	2007/8	% change	2008/9	2007/8	% change
November 2007	1,729,691	2,270,306	-24%	£142,855,183	£188,072,142	-24%
December 2007	2,573,224	3,113,032	-17%	£212,522,557	£257,883,597	-18%
January 2008	1,517,057	1,680,398	-10%	£125,293,708	£139,204,203	-10%
Total gross	5,819,972	7,063,737	-18%	£480,671,448	£585,159,943	-18%

To establish the numbers of FTE jobs supported by visitor expenditure, turnover per job figures have been drawn from standard economic impact studies. On average £40,300 is required to support each FTE job[1].

Drawing on the above figures, it is estimated that visitor expenditure associated directly with Christmas shopping helped to sustain 11,972 FTE jobs in the City (a drop from the 14,520 sustained in 2007/8).

7.2 Indirect/Induced impacts

In addition to the direct economic impacts, the spending of Christmas/post Christmas shopper has a range of indirect and induced effects on the local economy.

An indirect multiplier is associated with the purchases on supplies from other local businesses by firms deriving part or their entire turnover from the direct expenditure of Christmas/post Christmas shoppers.

An induced effect is associated with the local expenditure of those deriving their salaries from businesses whose turnover results directly or indirectly from the expenditure generated through Christmas/post Christmas shopping.

To calculate the indirect impact, total shopping expenditure is multiplied by a factor of 1.30. This multiplier was devised by English Partnerships and indicates levels of further economic activity associated with the creation of local income and local supplier purchases. Thus every £1 of direct expenditure will result in a further expenditure of £0.30 pence down the supply chain. Using this approach approximately an extra £144,201,434 is generated.

The induced multiplier is estimated at 1.10 for the local economy. Thus every £1 of direct expenditure will result in further expenditure of £0.10 pence down the spending chain. Using this multiplier an extra £48,067,145 is generated.

On the basis of the estimated direct expenditure associated with the exhibition and these multipliers, the projections of indirect and induced economic benefit associated with the exhibition are presented in the table below.

[1] The turnover per job figures have been drawn the study *Employment generated by tourism* in Britain (2003), VisitBritain, London.

Table 13: Indirect/induced economic benefits

Type Of Economic Benefit	Estimate Direct Expenditure	Economic	Additional Economic Benefit
Direct	£524,222,642		
Indirect		1.3	£144,201,434
Induced		1.1	£48,067,145
Total (direct/indirect/induced) expenditure			£672,940,027
Total FTE jobs sustained			14,520

On the basis of these assumptions it is estimated that the total direct, indirect and induced economic value of Christmas/post Christmas shopping to the local economy, was almost £673 million and sustained approximately 14,520 FTE jobs, primarily in the retail and catering sectors.

APPENDIX 1: Copy of Questionnaire