

# Birmingham Frankfurt Christmas Market 2021

## Visitor Survey & Economic Impact Report



**Final Report**

**February 2022**

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On behalf of Birmingham City Council

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## **Executive Summary**

The Research Solution was commissioned by West Midlands Growth Company on behalf of Birmingham City Council to undertake an evaluation of the event and the economic impact of the Birmingham Frankfurt Christmas Market on the City . This report provides analysis in response to a face to face questionnaire undertaken by a team of fully trained market research interviewers who completed a total of 500 questionnaires from 26<sup>th</sup> November to 21<sup>st</sup> December 2021.

The Birmingham Frankfurt Market had not taken place in 2020 due to Covid-19 restrictions in place during the year. The report will look at responses from visitors and residents to the market and their opinions on the main reason for visiting, how they found out about the market, had they visited previously along with their satisfaction on the range and quality of goods on offer as well as the food and drink available at the market.

- The majority of those visiting the Birmingham Frankfurt Christmas Market were day visitors (87%) with 13% staying overnight in the area. Of those who were on a day visit (87%), 18% were residents of Birmingham.
- Repeat visitors made up almost nine out of ten (88%) of respondents attending the Frankfurt Christmas Market.
- The parent county of the West Midlands provided almost half of visitors, (48%) with 13% from Birmingham itself. Staffordshire was the next main contributor but much further behind (11%).
- A total of 500 parties of visitors were surveyed. All respondents provided demographic data on their group. The average (mean) number of people per group was approximately 2.9 giving a total of at least 1427 people included in the survey sample. The largest proportion of respondents were visiting in groups of two (63%). There was a higher proportion of females (58%) than males (43%) who were interviewed at the Frankfurt Christmas Market
- Almost two thirds (64%) of respondents lie in the affluent ABC1 group, followed by 26% of C2's. Only 10% of all respondents were classified as DE's.
- 9% (44 no) of those interviewed considered themselves to have a longstanding illness, disability or infirmity, with 2% (12 no) of respondents who felt that there were access and communication barriers which restricted their visit to the Frankfurt Christmas Market.
- The largest proportion of all respondents are in full time employment (30+ hrs per week) – 69% compared to other groups, registering far smaller types of income earning.
- Over 4 in 5 (86%) were white British with much smaller numbers of other ethnic groups. There was a similar picture across all types of visitors.

- Overnight visitors accounted for 13% of visitors to the Birmingham Frankfurt Christmas Market staying in all types of accommodation. On average, all overnight visitors were stopping for 1.7 nights. Use of a Hotel was highest, with 75% of visitors staying overnight in this type of accommodation. Of the remaining visitors, those staying with family and friends made almost one fifth (19%) of overnights visitors.
- Over two fifths (44%) travelled by train with a total of almost 60% using some form of public transport. Use of the car was much lower with only 34% arriving by this mode of transport.
- With the introduction of the Clean Air Zone (CAZ)<sup>1</sup> in June 2021, respondents were asked if the introduction of this charge had influenced their decision on travelling to Birmingham. 87% stated that the Clean Air Zone did not have any influence on how they travelled to Birmingham on the day of interview.
- Almost three quarters (73%) of all visitors were in Birmingham predominantly to attend the Frankfurt Christmas Market with just over one quarter (27%) visiting the City itself. Other reasons for visiting Birmingham was a shopping trip (76%). Almost one quarter of visitors (24%) stated that they were there to visit restaurants/cafes/pubs & bars. 17% had also visited the City to meet friends and family and 7% cited other reasons for visiting. These included the draw of the market itself, the Christmas festive season and spending time with the family.
- Almost nine out of ten respondents (89%) had independently travelled to Birmingham with only 11% part of an organised group
- Almost three quarters (72%) of respondents would have stayed at home or gone to work had the Frankfurt Christmas Market not taken place and 2% would have visited somewhere outside of the West Midlands region. This is a significant proportion in terms of identifying the economic impact, i.e. if the Frankfurt Christmas Market had not taken place, almost three quarters of respondents would not have visited on the day of interview.
- Respondents were asked to identify the name of the organisers associated with the Frankfurt Christmas Market. Almost two thirds (63%) named Birmingham City Council.
- Encouragingly, the majority of those attending the Frankfurt Christmas Market in 2021 would make a return visit next year (86%). A small number was unsure (5%) and a further 9% indicated that they would not return to visit the Market in 2022.
- Over three fifths (61%) of respondents found out about the Frankfurt Christmas Market due to visiting the event previously and almost one quarter (23%) by word of mouth/recommendation as the main influence to visit the Market. 9% of visitors were just passing and decided to visit the Market. of visitors were just passing and decided to visit the event. Facebook/Twitter/other social media

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<sup>1</sup> A clean air zone is an area where targeted action is taken to improve air quality, in particular by discouraging the most polluting vehicles from entering the zone. No vehicle is banned in the zone, but those which do not have clean enough engines have to pay a daily charge if they travel within the area.

accounted for 9% who had found out about the event via this method with a further 8% who cited this medium as an influence on their visit. Around 6% found out about the event via the newspaper with 6% being influenced by the newspaper article/advert.

- The event was very well-received, with over nine in ten respondents rating Birmingham as a great place to visit, the food and drink other than at the market, shopping in Birmingham as good/very good.
- The presentation of the stalls and the quality of service received scored highest with respondents rating this good/very good – 92% respectively. Value for money on food and drink was rated the lowest with 41% rating it average and 18% rating this poor/very poor and this is reflected in the higher scoring seen for food elsewhere in Birmingham compared to food sold at the markets themselves.
- All visitors were asked if they had any comments to make about the Frankfurt Christmas Market . A variety of comments and suggestions were given including festive/Christmas feeling, great atmosphere, smaller than usual, wider range of stalls needed/less food stalls, great event and love coming, food expensive, well organised, meeting friends and family for a great day out.
- The average spend by all visitors to the Frankfurt Christmas Market was approximately £71.74 per person per night. Day visitors spent on average £58.19 per person per day and visitors staying overnight in Birmingham using commercial accommodation spent on average £123.50 per person per night.
- In total, Round 1 and multiplied expenditure amounted to £351,369,536 . The expenditure generated by the Frankfurt Christmas Market was sufficient to support 7,140 jobs – 5,370 directly and 1,770 indirectly – of which 5,255 FTE jobs were additional.

## 1.1 Introduction

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The Research Solution was commissioned by West Midlands Growth Company on behalf of Birmingham City Council to undertake an evaluation of the event and the economic impact of the Birmingham Frankfurt Christmas Market on the City . This report provides analysis in response to a face to face questionnaire undertaken by a team of fully trained market research interviewers who completed a total of 500 questionnaires from 26<sup>th</sup> November to 21<sup>st</sup> December 2021.

The Frankfurt Christmas Market had not taken place in 2020 due to Covid-19 restrictions in place during the year. The report will look at responses from visitors and residents to the market and their opinions on the main reason for visiting, how they found out about the market, had they visited previously along with their satisfaction on the range and quality of goods on offer as well as the food and drink available at the market.

## 1.2 Aims of the survey

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The aim of the survey was to:

- To identify and quantify the visitor element and economic impact of the Birmingham Frankfurt Christmas Market on the City and the rest of the West Midlands, including the number of jobs created and supported;
- To develop a profile of the audience for the event, and;
- To obtain consumer perceptions of the event and suggestions for future improvements, from both local residents and visitors.

More specifically the research was designed to use fieldwork and multiplier analysis to gather:

- Audience Profile;
- Lifestyle characteristics;
- Motivations, key drivers and triggers for attendance including the role of the city in deciding to visit;
- Influence of marketing in the decision to attend;
- Length of stay in Birmingham and the rest of the West Midlands;
- Modes of transport used to travel to, and within the city;
- Quality of experience including satisfaction with and image of the Birmingham Frankfurt Christmas Market and Birmingham itself, and; Visitor expenditure (direct, indirect and induced)

### 1.3 Survey Methodology

The Research Solution in consultation with the client designed a questionnaire to gain information from visitors to the Birmingham Frankfurt Christmas Market. TRS undertook the following:

- questionnaire design – in association with West Midlands Growth Company and Birmingham City Council
- face to face interviews at the event
- analysis of results – through the SNAP data analysis package
- interpretation of results
- Production of a written report – covering methodology and results.

Interviews were undertaken at locations across the city and the number of interviews undertaken are shown in Table 1 below.

Table 1: Location of Interviews		
	Location	Sample
Victoria Square	19%	97
Chamberlain Square	19%	95
Centenary Square	18%	90
New Street	17%	87
St Philips Church	15%	75
Bridge/Underpass by Mailbox	11%	56
<b>TOTAL</b>	<b>99%</b>	<b>500</b>

N.B. Percentage may not add up to 100% due to rounding

Both residents and non-residents were interviewed as part of the sample with a quota of five residents per interview day included in the overall sample of 500. 84% were classed as visitors and 16% as residents.

The surveys were completed by trained market researchers, approaching visitors at random, over a period of weekdays and weekends, whilst the market was taking place. Interviewing began on Friday 26<sup>th</sup> November and was completed on Monday 20<sup>th</sup> December 2021.



## 1.4 Statistical Reliability

All sample surveys are subject to statistical error that varies with the sample size and the order of magnitude of the research findings being considered. This survey obtained a sample of 500 and the margins within which one can be 95% certain that the true figures in this report will lie are presented below.

Table 2: Statistical Error	
Findings from survey	95% confidence interval
50%	+/- 6.9%
40/60%	+/- 6.8%
30/70%	+/- 6.4%
20/80%	+/- 5.5%
10/90%	+/- 4.2%

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 +/- 5.5%, i.e. between 14.5% and 25.5%.

## 1.5 Notes to the reader

- All percentages are rounded to the nearest whole figure so on occasions figures may not exactly equal 100%
- A “0” indicates a value of less than 0.5%
- A dash (-) indicates no value

## 1.6 Comparing 2021 and previous data

Reference to previous research undertaken at the Birmingham Frankfurt Christmas Market will be made where possible throughout this report. Whilst the market offer in each of the previous years has been fairly consistent, the restrictions over the past two years of Covid-19 may have influenced the attitudinal and behavioural data of visitors to the markets. Therefore, caution should be considered when interpreting and comparing these results.

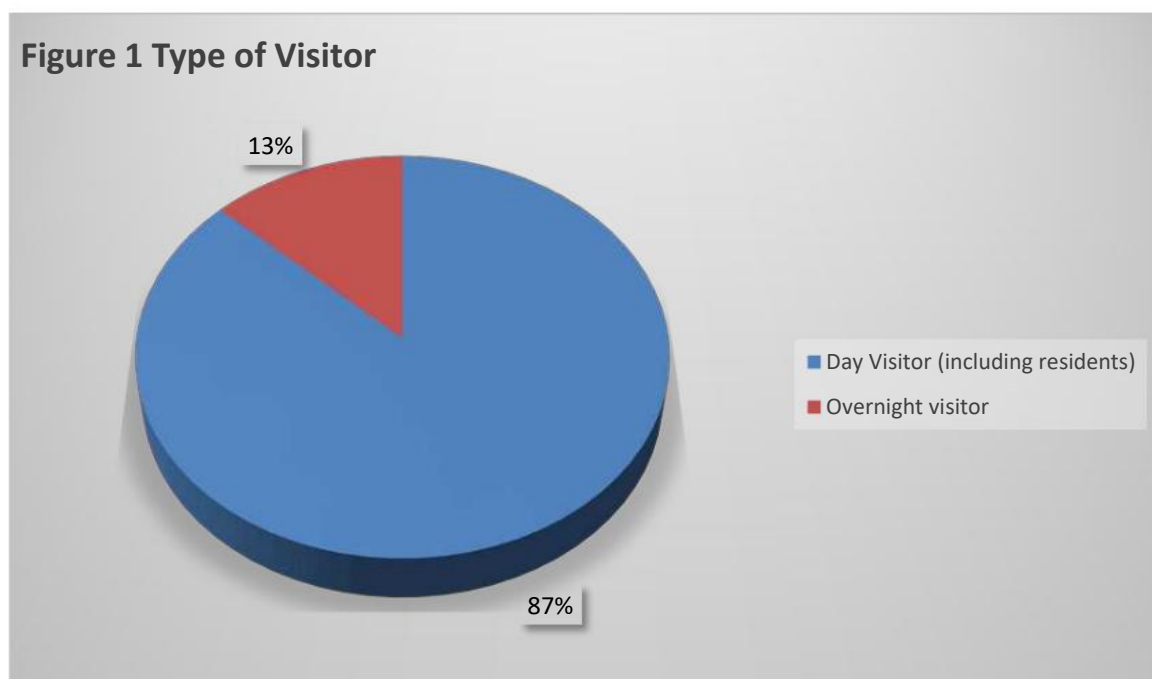
## 2.0 Type of Visitor

### 2.1 Differentiating Between Visitor Types

The survey data has been analysed in two ways. Firstly, by considering all visitors as a single market and secondly, by segmenting visitors into different groups according to the type of trip made. Visitors are divided into two segments relating to the type of trip they made to the Birmingham Frankfurt Christmas Market.

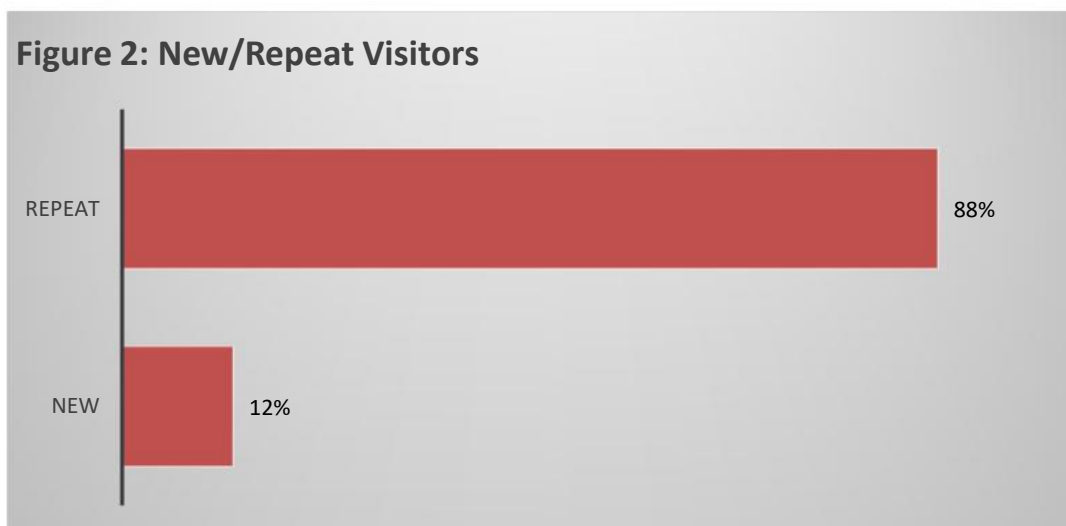
- ❖ **Day Visitors:** The "day out" market - visitors, who start their journey from home and return there on the same day, including residents of Birmingham.
- ❖ **Overnight Visitors:** Those visitors who spend one or more nights in Birmingham. This sector of the market includes those staying with family and friends as well as those using commercial accommodation.

The majority of those visiting the Birmingham Frankfurt Christmas Market were day visitors (87%) with 13% staying overnight in the area. Of those who were on a day visit (87%), 18% were residents of Birmingham.



## 2.2 New and Repeat Visitors

Repeat visitors made up almost nine out of ten (88%) of respondents attending the Frankfurt Christmas Market on the day of interview.



Day visitors mirrored that of the total number of repeat visitors with those staying overnight having a greater share of first time visitors to the event.

Table 3: New/Repeat – by Type of Visitor			
	All	Day	Overnight
New	12%	10%	28%
Repeat	88%	90%	72%

### 3.0 Origin of Visitor

#### 3.1 Categorising the Visitor

Respondents were asked to state their normal place of residence. Visitors to the event came from across the whole of the UK. The parent conurbation of the West Midlands provided almost half of visitors, (48%) with 13% from Birmingham itself. Staffordshire was the next main contributor but much further behind (11%).

Table 4 shows a full list of the areas by origin.

Table 4: Origin by Type of Visitor					
	Total	Day	Overnight	New	Repeat
West Midlands	48%	98%	2%	7%	93%
Staffordshire	11%	96%	4%	16%	84%
Worcestershire	3%	94%	6%	3%	97%
Warwickshire	2%	86%	14%	14%	86%
Shropshire	2%	85%	15%	20%	80%
Leicestershire	2%	94%	6%	29%	71%
Northamptonshire	2%	64%	36%	36%	64%
Derbyshire	2%	90%	10%	30%	70%
Cambridgeshire	2%	80%	20%	30%	70%
London/Middlesex	2%	50%	50%	25%	75%
South Wales	2%	25%	75%	12%	88%
Gloucestershire	1%	83%	17%	50%	50%
Buckinghamshire	1%	83%	17%	50%	50%
Devon	1%	-	100%	40%	60%
Cheshire	1%	100%	-	50%	50%
West Yorkshire	1%	50%	50%	75%	25%
Herefordshire	1%	50%	50%	50%	50%
Manchester	1%	100%	-	-	100%
Nottinghamshire	1%	100%	-	33%	67%
Norfolk	1%	33%	67%	33%	67%

As you can see from the table 2 above, the majority of visitors to the Frankfurt Christmas Market were within easy distance of the event itself, with almost half from within the West Midlands County. Much smaller numbers came from across the UK including Merseyside, North Yorkshire, Kent, Oxfordshire, Somerset, Wiltshire, Durham, Tyne & Wear, south Yorkshire, Suffolk, East Sussex, Surrey, Berkshire, Hertfordshire, Bedfordshire, Scotland, Northern Ireland, North Wales and Powys. There were two overseas visitors, one from the UAE and one from France.

Table 5: Origin of Visitor by Region & Country			
	2021	2017	2016
West Midlands Region	74%	71%	77%
East Midlands	9%	10%	7%
East of England	3%	2%	1%
South West	3%	2%	2%
South East	2%	4%	3%
North West	2%	3%	2%
London/Middlesex	2%	4%	2%
Wales	2%	1%	1%
Yorkshire & Humber	1%	1%	1%

When compared with previous surveys undertaken at the Frankfurt Christmas Market, the West Midlands region continues to be the top provider of visitors to the event, between 71% and 77%. Across all regions, there is very little change in where visitors to the market originate from.

## 4.0 DEMOGRAPHIC PROFILE OF VISITORS

### 4.1 Group Composition

A total of 500 parties of visitors were surveyed. All respondents provided demographic data on their group. The average (mean) number of people per group was approximately 2.9 giving a total of at least 1427 people included in the survey sample.

**Table 6: Average party size by type of visitor**

	Size
All visitors	2.9
Day visitors	2.8 *
Staying visitors	3.5
New	3.1
Repeat	2.8
Residents	2.0
Non-residents	3.0

\*includes 7 groups with between 20-50 people in their party

### 4.2 Number in group

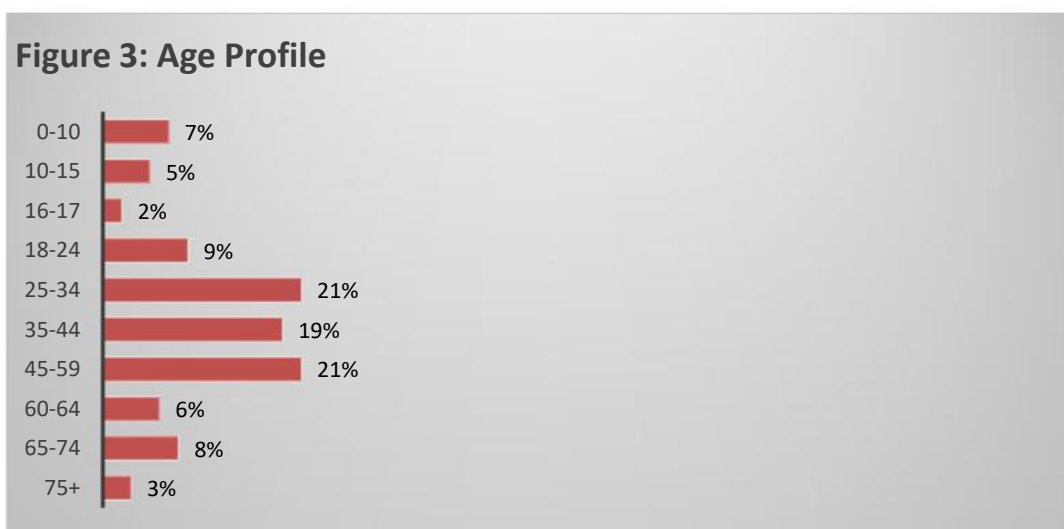
**Table 7: Number in Group – by Type of Visitor**

	2021	2017	2016	New	Repeat
One	7%	24%	22%	10%	7%
Two	63%	52%	58%	69%	62%
Three	16%	14%	11%	15%	16%
Four	9%	6%	6%	1%	11%
Five	2%	4%	4%	1%	2%
Five or more	2%			4%	2%

The largest proportion of respondents were visiting in groups of two (63%), higher than both 2017 and 2016 (52% and 58% each). First-time visitors had more groups of two (69%) than those who had visited before (62%). Groups of four or more accounted for 15% of repeat visitors compared with only 6% of those respondents visiting for the first time.

### 4.3 Age Groups

Figure 3 below shows the age profile of respondents<sup>2</sup>. The visitor market is fairly mixed across the age ranges with those aged between 25 and 44 accounting for 40% of all visitors to the Birmingham Frankfurt Christmas Market followed by 21% of respondents aged between 45 and 59. Those aged 65 and over accounted for 11% of visitors indicating that in general, the Frankfurt Christmas Market attracted those in their mid-twenties to middle age group.



	2021	2017	2016
0-10	7%	10%	9%
10-15	5%	10%	4%
16-17	2%	13%	6%
18-24	9%	13%	13%
25-34	21%		14%
35-44	19%	12%	13%
45-59	21%	11%	14%
60-64	6%	12%	11%
65-74	8%	11%	11%
75+	3%	8%	5%

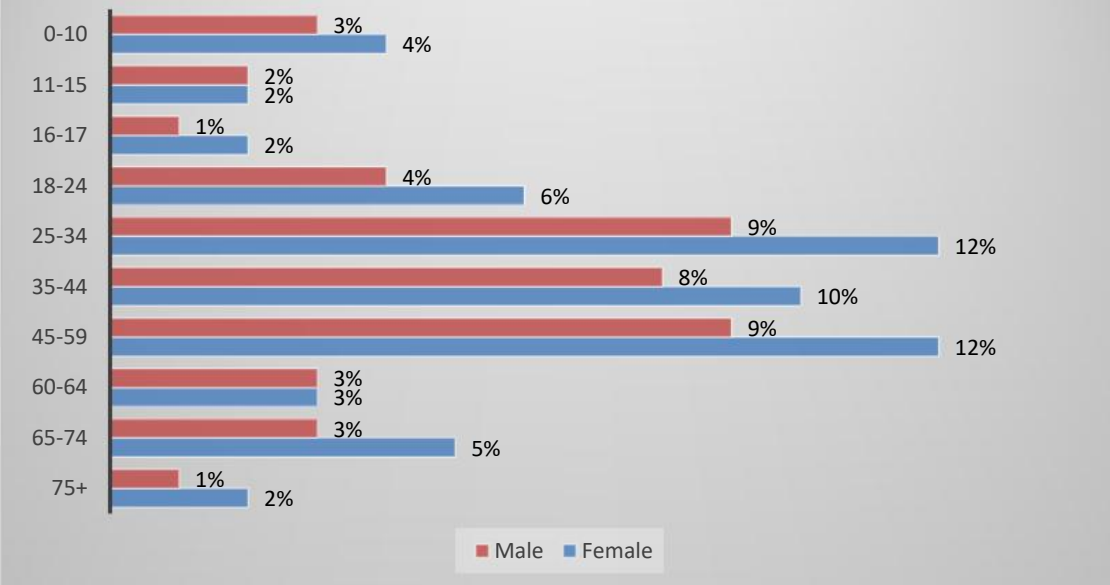
There has been a shift in the ages of those visiting the Frankfurt Market since 2016 with a shift in the number of visitors from younger age groups attending the event. Only 14% of visitors were under 17 years of

<sup>2</sup> For a more accurate demography of visitors at the event rather than respondents, see section Figure 4

age in 2021 compared with 19% in 2016 and 33% in 2017. This is also evident in those visitors aged 60+ with 17% visiting in 2021 compared with 36% and 34% in 2016 and 2017, respectively. This may be linked to Covid-19 and the reluctance by certain age groups to attend large scale events during this period.

The question on the gender and age make-up of respondent's **whole** visiting party gives us a broader picture of the age and gender of those present on the day. Figure 4 below, shows that over one third of all visiting parties were aged 45 and over (38%). The highest proportions were for those aged 25-34 and 45-59 (9% males and 12% female respectively). The appeal to those attending with there is much less with only 15% of both males and females attending with their family or friends. There was a higher proportion of females (58%) than males (43%) who were interviewed at the Frankfurt Christmas Market

**Figure 4: Group profile**



NB: Figures may not add up to 100% due to rounding.



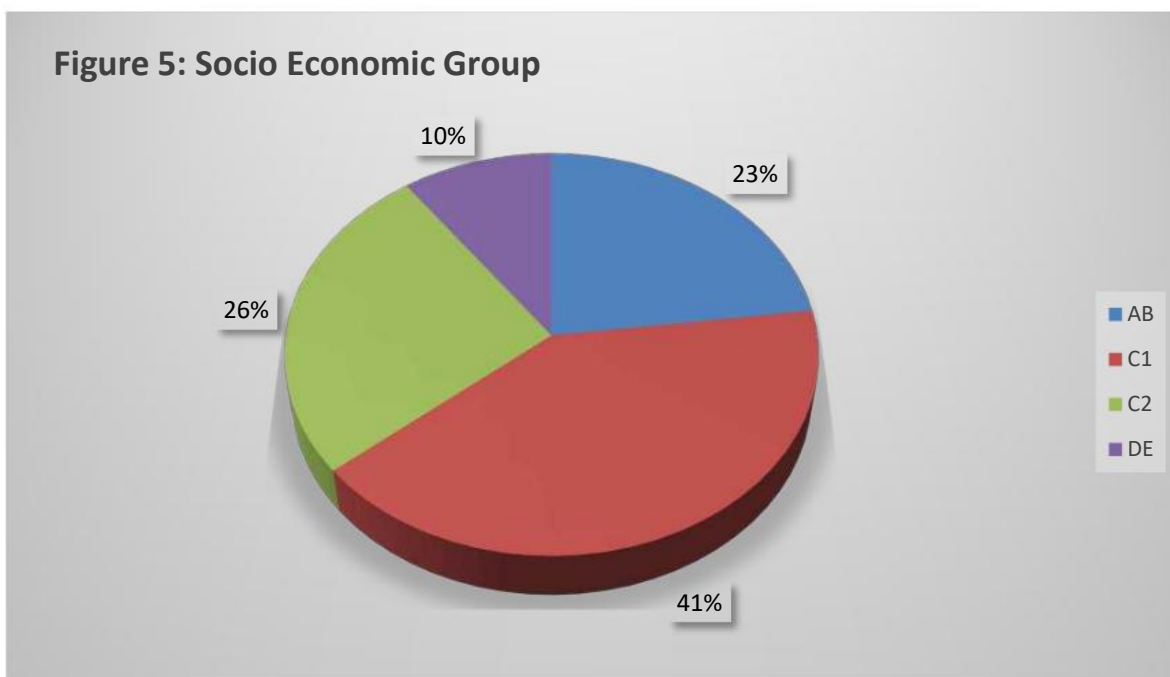
#### 4.4 Socio economic classification

Visitors were asked to describe the occupation of the chief wage earner in their household and to indicate by means of a show card which socio-economic group they thought applied. All responses were crosschecked with any misleading cases removed from this analysis. It is accepted that this method provides a rough guide to the type of visitor in the area.

The key to the groups is based upon the Market Research Society standards. In broad terms the groups are as follows.

- AB Managerial, administrative or professional at senior or intermediate level
- C1 Supervisory, clerical (i.e. white collar), junior administrative or professional
- C2 Skilled manual worker
- DE Semi-skilled and unskilled manual worker retired state pensioner
  - Casual earner, unemployed

**Figure 5: Socio Economic Group**



Almost two thirds (64%) of respondents lie in the affluent ABC1 group, followed by 26% of C2's. Only 10% of all respondents were classified as DE's.

Table 9: Socio Economic Group – by Type of Visitor							
	2021	2017	2016	Day	Overnight	New	Repeat
AB	23%	20%	20%	20%	42%	26%	22%
C1	41%	38%	41%	42%	38%	41%	42%
C2	26%	28%	19%	27%	17%	25%	26%
DE	10%	14%	19%	11%	3%	9%	11%

There were more white collar ABC1's (64%) compared to previous years (61% in 2016 and 58% in 2017) – with a consequent fall in C2DE respondents. Overnight and first time visitors to the market had a higher number of ABC1's in their party.

9% (44 no) of those interviewed considered themselves to have a longstanding illness, disability or infirmity, with 2% (12 no) of respondents who felt that there were access and communication barriers which restricted their visit to the Frankfurt Christmas Market.

#### 4.5 Chief Income Earner

The following chart and table outlines the life stage of the chief income earner. The largest proportion of all respondents are in full time employment (30+ hrs per week) – 69% compared to other groups, registering far smaller types of income earning.



Table 10: Employment Status by Type of Visitor

	2021	2017	2016	Day	Overnight	New	Repeat
Employed Full time	69%	66%	59%	67%	83%	82%	68%
Retired with Company/Private Pension	13%	10%	15%	13%	11%	6%	14%
F/T Education	6%	11%	9%	7%	3%	3%	7%
Employed Part time	5%	8%	11%	5%	2%	3%	5%
Unemployed/Not Working	2%	1%	3%	3%	-	-	3%
Other	2%	1%	1%	2%	2%	2%	2%
Long term sick/disabled	1%	1%	0%	1%	-	2%	1%
Looking after the home/family	1%	2%	2%	1%	-	2%	1%

There has been a continued upward trend in the number of full time employed since 2016 rising from 59% to 69% over this period. More overnight and new visitors were in full time employment than both day and repeat visitors. The opposite was seen in the number of retired visitors, with new visitors accounting for only 6% compared with 14% repeat and 13% of day visitors.

#### 4.6 Ethnicity

The table below presents the breakdown of *broad* ethnicity from respondents visiting the Frankfurt Christmas Market.

Table 11: Ethnicity – by Type of Visitor

	2021	Day	Overnight	New	Repeat
White British	86%	86%	88%	86%	86%
Indian	3%	4%	2%	7%	3%
White/Black Caribbean	3%	3%	3%	1%	3%
Caribbean	2%	2%	2%	-	2%
White Other	1%	1%	5%	1%	1%
White & Asian	1%	1%	-	-	1%
Pakistani	1%	1%	-	-	1%
Irish	1%	1%	-	1%	1%
Other Asian	1%	0%	-	1%	1%

Thus, over 4 in 5 (86%) were white British with much smaller numbers of other ethnic groups. There was a similar picture across all types of visitors.

## 5.0 ACCOMMODATION

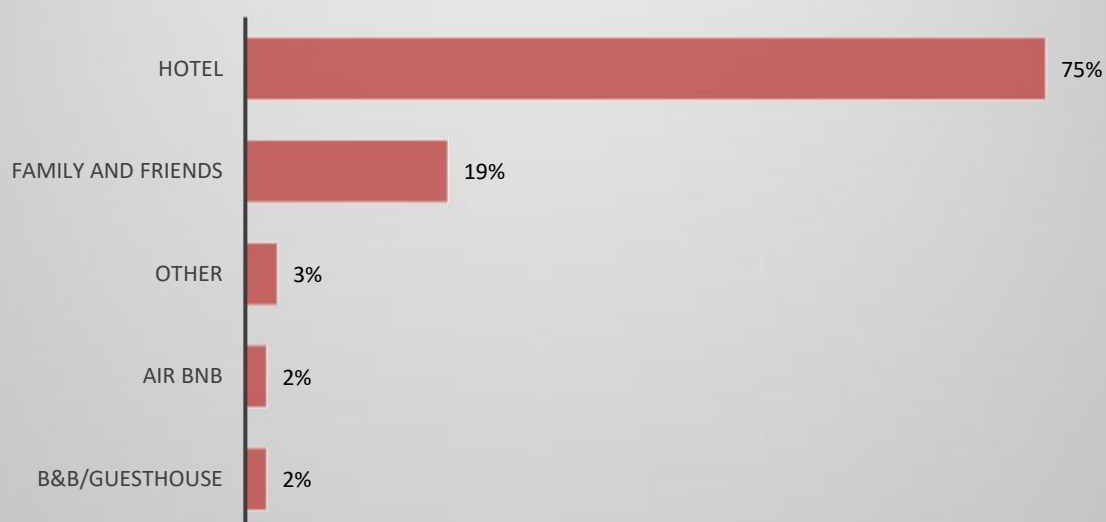
### 5.1 Accommodation used at the Birmingham Frankfurt Christmas Market

Overnight visitors (64 no) accounted for 13% of visitors to the Birmingham Frankfurt Christmas Market staying in all types of accommodation. On average, all overnight visitors were stopping for 1.7 nights. Figure 7 shows a breakdown of accommodation used.

Use of a Hotel was highest, with 75% of visitors staying overnight in this type of accommodation. Of the remaining visitors, those staying with family and friends made almost one fifth (19%) of overnights visitors.

Of the small number using other accommodation, these were noted as city apartments.

**Figure 7: Accommodation Used**

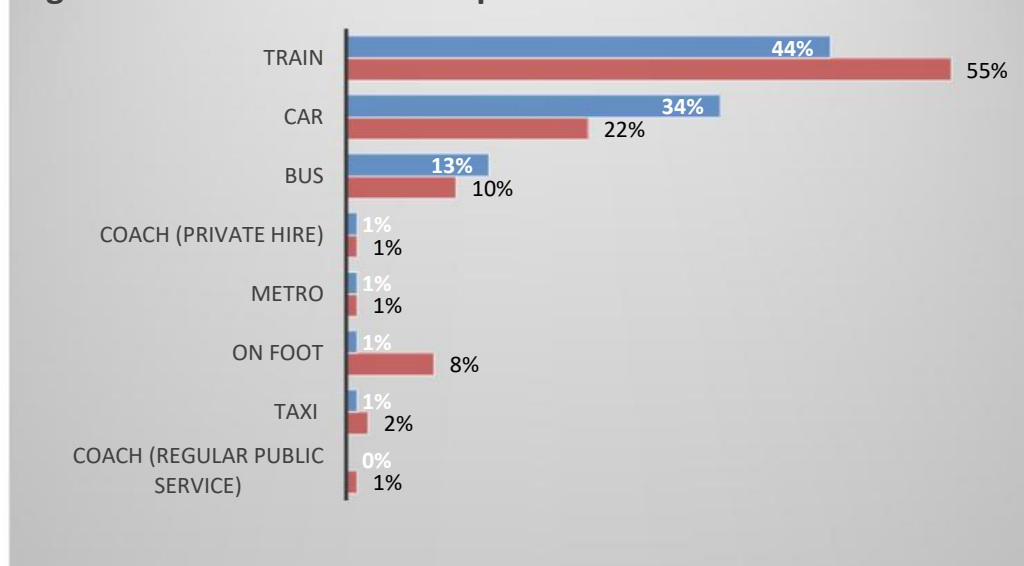


## 6.0 TRANSPORT

### 6.1 Train Dominant Transport Mode

Although over two fifths (44%) of visitors to the Birmingham Frankfurt Christmas Market travelled by train, this had fallen since 2017 when over half (55%) had arrived in Birmingham by this mode of transport. Conversely, use of the car had increased, up from 22% to 34%. Use of the bus had seen a small increase, up from 10% to 13% in 2021. In general, use of public transport had decreased since 2017. However, confidence in travelling by public transport with Covid-19 still prevalent may have been a factor in deciding to drive to the event. Walking to the event had also declined, down from 8% in 2017 to only 1% in 2021.

**Figure 8: Main mode of transport**



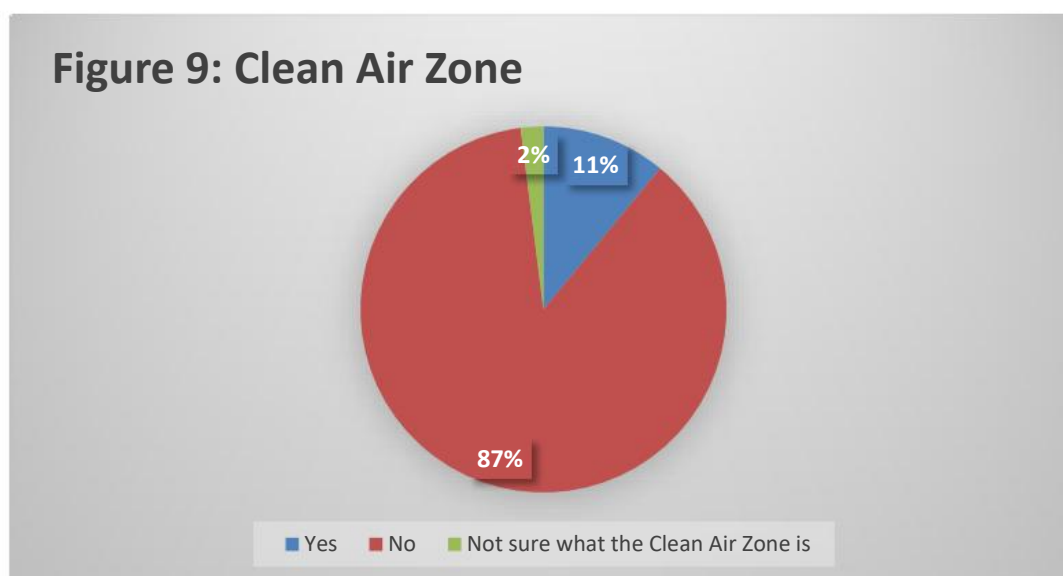
**Table 12: Mode of Transport**

	2021	2017	Day	Overnight	New	Repeat
Train	44%	55%	44%	39%	40%	45%
Car	34%	22%	33%	45%	40%	33%
Bus	13%	10%	14%	2%	11%	13%
Coach (private hire)	1%	1%	6%	6%	6%	5%
Tram	1%	1%	2%	-	-	2%
On foot	1%	8%	1%	3%	4%	1%
Taxi	1%	1%	0%	3%	-	1%
Coach (regular public service)	0%	1%	0%	2%	-	0%

Use of the train and bus was highest amongst day visitors and those who had previously visited the Birmingham Frankfurt Market. Overnight visitors were more likely to arrive by car than any other sector.

## 6.2 Clean Air Zone – Decision on travelling to the Market

With the introduction of the Clean Air Zone (CAZ)<sup>3</sup> in June 2021, respondents were asked if the introduction of this charge had influenced their decision on travelling to Birmingham.



The majority of respondents (87%) stated that the Clean Air Zone did not have any influence on how they travelled to Birmingham on the day of interview. This was the same across all types of visitor with new visitors less likely to be influenced than other segments.

Lack of awareness of what the Clean Air Zone is, was fairly small, ranging from 2%-5%.

Table 13: Clean Air Zone by Type of Visit					
	2021	Day	Overnight	New	Repeat
No	87%	87%	86%	90%	86%
Yes	11%	11%	12%	5%	12%
Not sure what the Clean Air Zone is	2%	2%	2%	5%	2%

<sup>3</sup> A clean air zone is an area where targeted action is taken to improve air quality, in particular by discouraging the most polluting vehicles from entering the zone. No vehicle is banned in the zone, but those which do not have clean enough engines have to pay a daily charge if they travel within the area.

## 7.0 MAIN REASON FOR VISITING THE FRANKFURT CHRISTMAS MARKET

### 7.1 Frankfurt Christmas Market main draw

Almost three quarters (73%) of all visitors were in Birmingham predominantly to attend the Frankfurt Christmas Market with just over one quarter (27%) visiting the City itself.

Across all visitor types, the Frankfurt Christmas Market was their main reason for visiting Birmingham. However, over a third of overnight visitors (34%) stated this was not the main driver in visiting Birmingham on the day of interview.

Table 14: Main Reason for Visit by Type of Visit

	All	Day	Overnight	New	Repeat
Yes	73%	74%	66%	76%	72%
No	27%	26%	34%	24%	28%

Respondents were also asked what other things they would be doing whilst in Birmingham, this could include multiple responses and is reflected in the percentages. The top response was a shopping trip (76%). Almost one quarter of visitors (24%) stated that they were there to visit restaurants/cafes/pubs & bars. 17% had also visited the City to meet friends and family and 7% cited other reasons for visiting. These included the draw of the market itself, the Christmas festive season and spending time with the family.

Table 15: Other reasons for visiting Birmingham today

	All	Day	Overnight	New	Repeat
Shopping trip	76%	78%	62%	77%	76%
Restaurant/Café/Pubs/Bars	24%	23%	30%	19%	25%
Meeting friends and relatives	17%	15%	30%	11%	18%
Other	7%	7%	11%	5%	8%
Christmas at Cathedral Square	3%	3%	7%	1%	4%
To visit another event or attraction	3%	2%	8%	3%	3%
Work/business/conference/study	3%	3%	2%	5%	2%
Ice Skate Birmingham	1%	1%	5%	1%	1%
Heritage & museums	1%	1%	3%	3%	1%

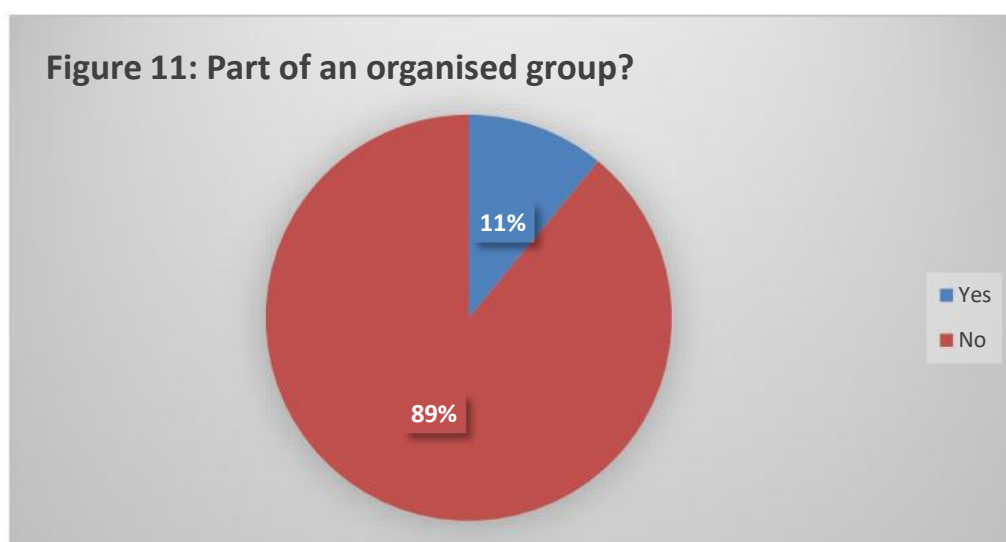
Respondents were also in Birmingham for work/business/conference/study reasons, Christmas at Cathedral Square and to visit another event or attraction – 3% respectively. Places noted by respondents visiting an event or attraction included a visit to the Sea Life centre, the Symphony Hall, Jersey Boys and a concert.

Of those not included in Table 13, 1 respondent cited a cultural event and 1 respondent stated city social (Christmas Market by the Mailbox underpass) as reasons for visiting the City.

A shopping trip was also the top response across the different types of visitor with day, new and repeat visitors on a par with all visitors. The overnight market was less dominated by shopping with a broader mix of reasons including visiting a restaurant/café/pub/bar and meeting friends and relatives.

## 7.2 Part of Organised Group?

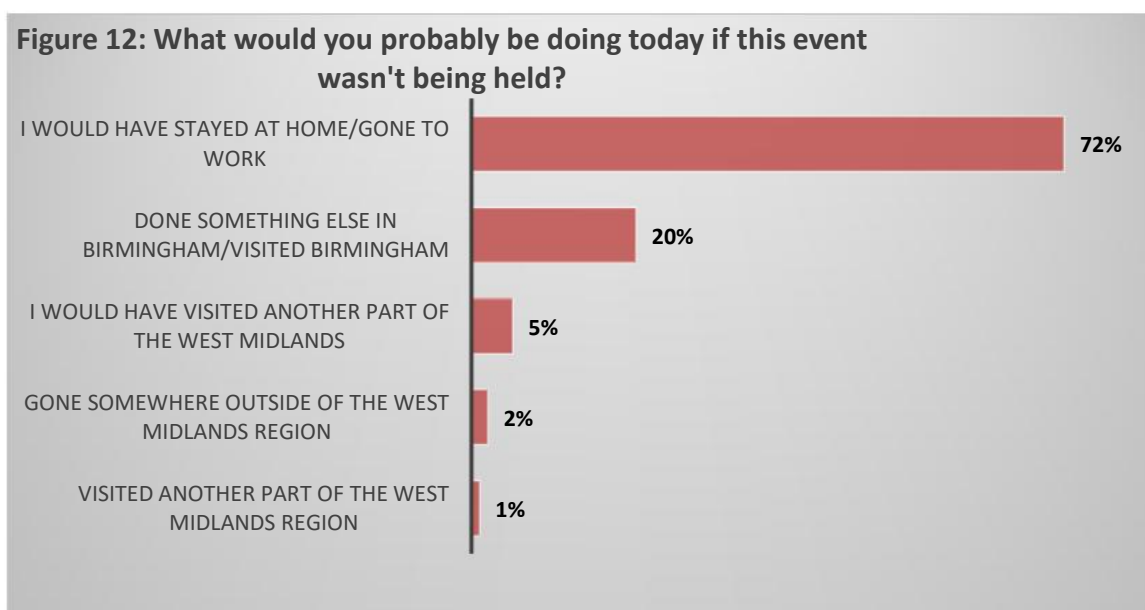
Respondents were asked if their trip to Birmingham was part of an organised group. Almost nine out of ten respondents (89%) had independently travelled to Birmingham with only 11% part of an organised group.





### 7.3 Would you have visited if the Frankfurt Christmas Market had not taken place?

Visitors were asked what else they would have done had the Frankfurt Christmas Market not taken place.



Almost three quarters (72%) of respondents would have stayed at home or gone to work had the Frankfurt Christmas Market not taken place and 2% would have visited somewhere outside of the West Midlands region. This is a significant proportion in terms of identifying the economic impact, i.e. if the Frankfurt Christmas Market had not taken place, almost three quarters of respondents would not have visited on the day of interview.

It should also be noted that over a quarter (28%) of respondents said they would have visited Birmingham on that day if the Frankfurt Christmas Market had not taken place.

The impact of the Frankfurt Christmas Market on the city will be covered in more depth in Section 9.

## 7.4 Organisers of Frankfurt Christmas Market

Respondents were asked to identify the name of the organisers associated with the Frankfurt Christmas Market. Almost two thirds (63%) named Birmingham City Council (75% in 2017 and 55% in 2016).

	All	Day	Overnight	New	Repeat
Birmingham City Council	63%	65%	48%	47%	66%
Don't know	33%	32%	42%	49%	30%
Frankfurt Tourism Board	8%	8%	9%	5%	9%

Awareness of the organisers of the Frankfurt Christmas Market was lower amongst overnight and new visitors and much higher with those respondents on a day visit and those who had visited on a previous occasion.

## 7.5 Return Visit

Encouragingly, the majority of those attending the Frankfurt Christmas Market in 2021 would make a return visit next year (86%). A small number was unsure (5%) and a further 9% indicated that they would not return to visit the Market in 2022.

	All	Day	Overnight	New	Repeat
Yes	86%	88%	73%	64%	89%
No	9%	8%	19%	26%	7%
Don't Know	5%	5%	8%	10%	5%

With the awareness of what the market has to offer, repeat visitors were more likely to make a return visit than any other market (89%) followed by respondents on a day visit (88%). With a high level of visitors originating from the West Midlands, the access to the Frankfurt Christmas Market may influence the high number of respondents intending to visit next year.

Of those respondents who had visited the Frankfurt Christmas Market on a previous occasion, the average number of years they had visited was 5.9, ranging from 1 to 22 years.

## 8.0 MARKETING & PROMOTION

### 8.1 Effectiveness of marketing activity

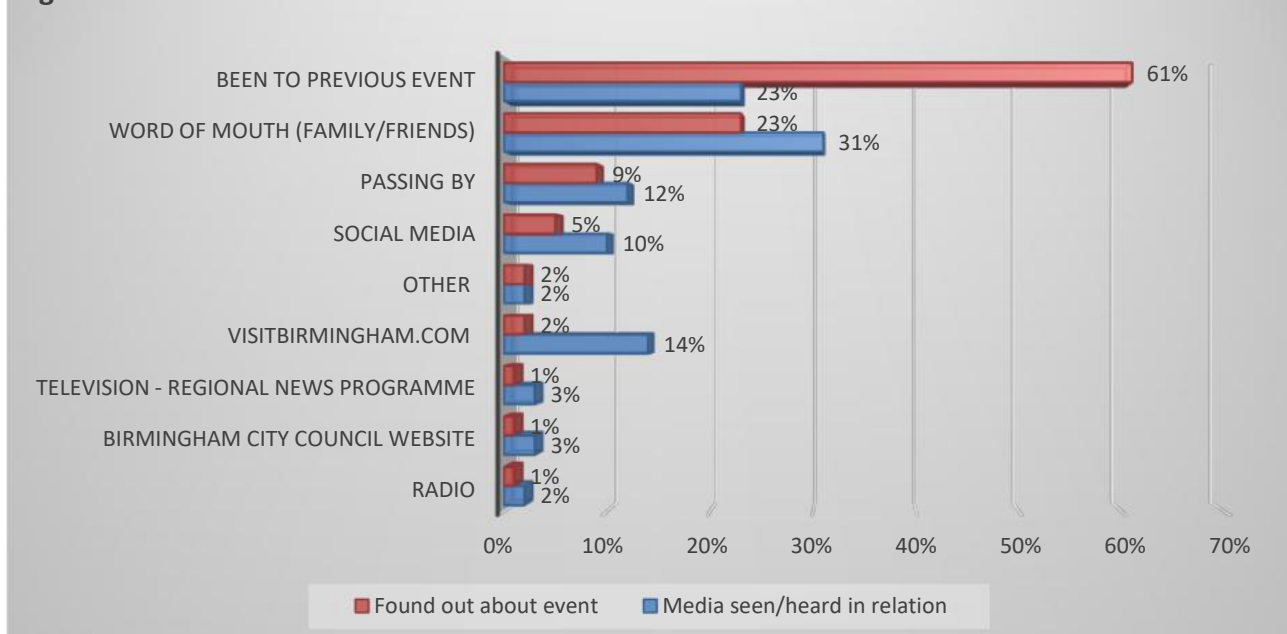
Marketing is extremely important for any event held. In an attempt to gain a measure of marketing channels used to promote the Frankfurt Christmas Market, respondents were asked to detail how they found out about the Market and what the main influence was on their decision to visit, as shown below.

Over three fifths (61%) of respondents found out about the Frankfurt Christmas Market due to visiting the event previously and almost one quarter (23%) by word of mouth/recommendation as the main influence to visit the Market. 9% of visitors were just passing and decided to visit the Market.

Facebook/Instagram/Twitter/other social media accounted for 5% who had found out about the Market via this method with a further 2% who cited other as the reason. This included such responses as work in the area, a day out and the internet. Around 2% found out about the Market via VisitBirmingham.com and 1% cited television, Birmingham City Council website and radio as their response. 1 respondent stated newspaper.

There was a far more mixed response regarding which media they had seen about the Birmingham Frankfurt Christmas Market with 31% stating word of mouth and 23% having previously visited the event before. 14% of respondents had seen the Market being advertised on VisitBirmingham.com, 12% were just passing by and 10% cited social media. From those citing social media, the main response was Facebook, with a small number also noting Instagram and YouTube.

**Figure 13: How found out about Market**



N.B. Percentages do not add up to 100% as respondents could select more than one answer

Been to a previous event was noted by 63% of day visitors and 70% of returning visitors to the Frankfurt Christmas Market. Word of Mouth was more prevalent amongst first time and overnight visitors. New visitors to the Frankfurt Christmas Market made more use of social media and the VisitBirmingham.com website than any other type of visitor (21% and 6% respectively).

Table 18: Find out about Frankfurt Christmas Market by type					
	All	Day	Overnight	New	Repeat
Been to previous event	61%	63%	48%	0%	70%
Word of mouth (family/friends)	23%	22%	28%	42%	21%
Passing by	9%	9%	12%	21%	8%
Social Media	5%	6%	3%	21%	3%
Other	2%	2%	3%	5%	2%
VisitBirmingham.com	2%	2%	3%	6%	1%
Television – Regional news programme	1%	1%	2%	3%	1%
Birmingham City Council website	1%	1%	3%	-	1%
Radio	1%	1%	-	3%	0%
Newspaper	0%	0%	-	-	0%

## 8.2 Satisfaction scores

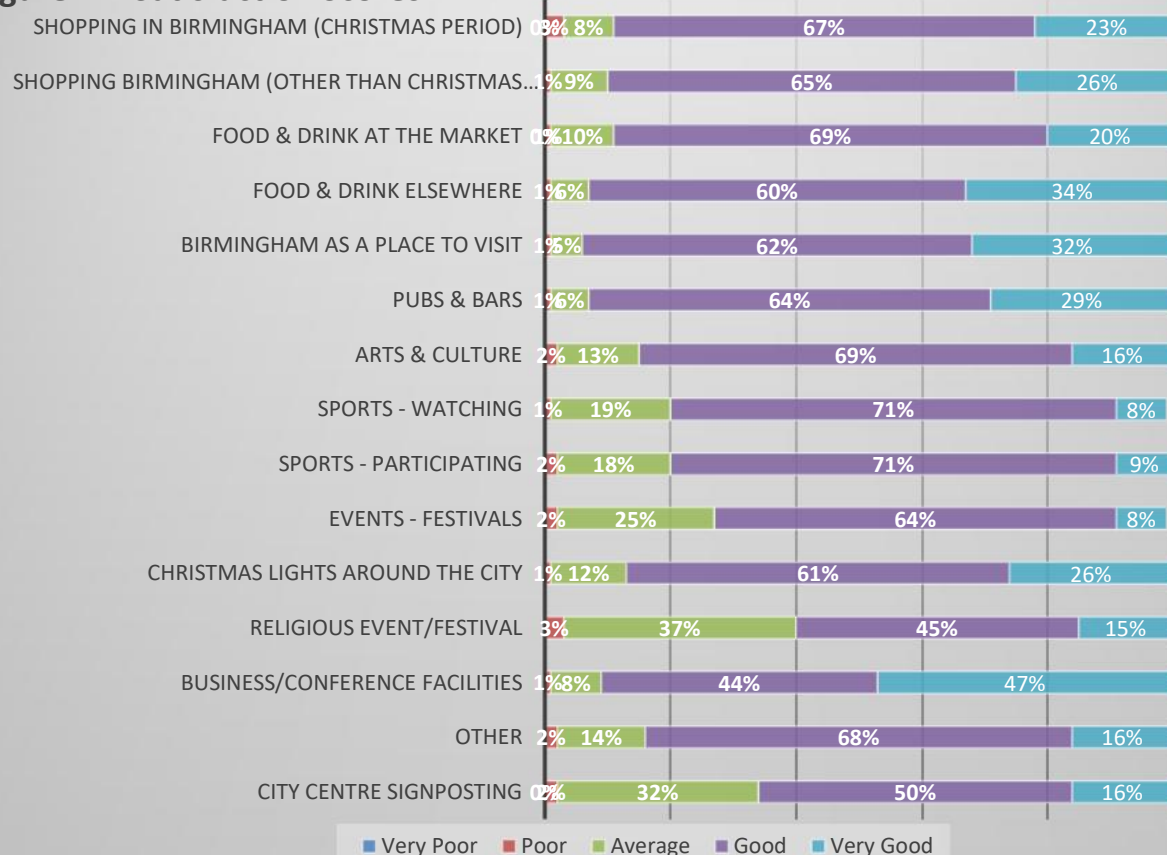
Visitors were asked to rate their levels of satisfaction with various aspects of the event using the Likert scale (where 1=very poor and 5=very good), as shown in Figure 14 below.

- Birmingham as a place to visit (94%)
- Food & drink elsewhere (94%)
- Shopping in Birmingham - other than Christmas period (91%)
- Pubs & bars (93%)
- Business/conference facilities (91%)
- Shopping in Birmingham - Christmas period (90%)

The lowest ratings in terms of scores of good/very good was received for event signposting (66%) religious event/festival (60%) and event - festivals (72%).

Table 19 overleaf shows that the mean satisfaction scores for each of the facilities.

**Figure 14: Satisfaction Scores**



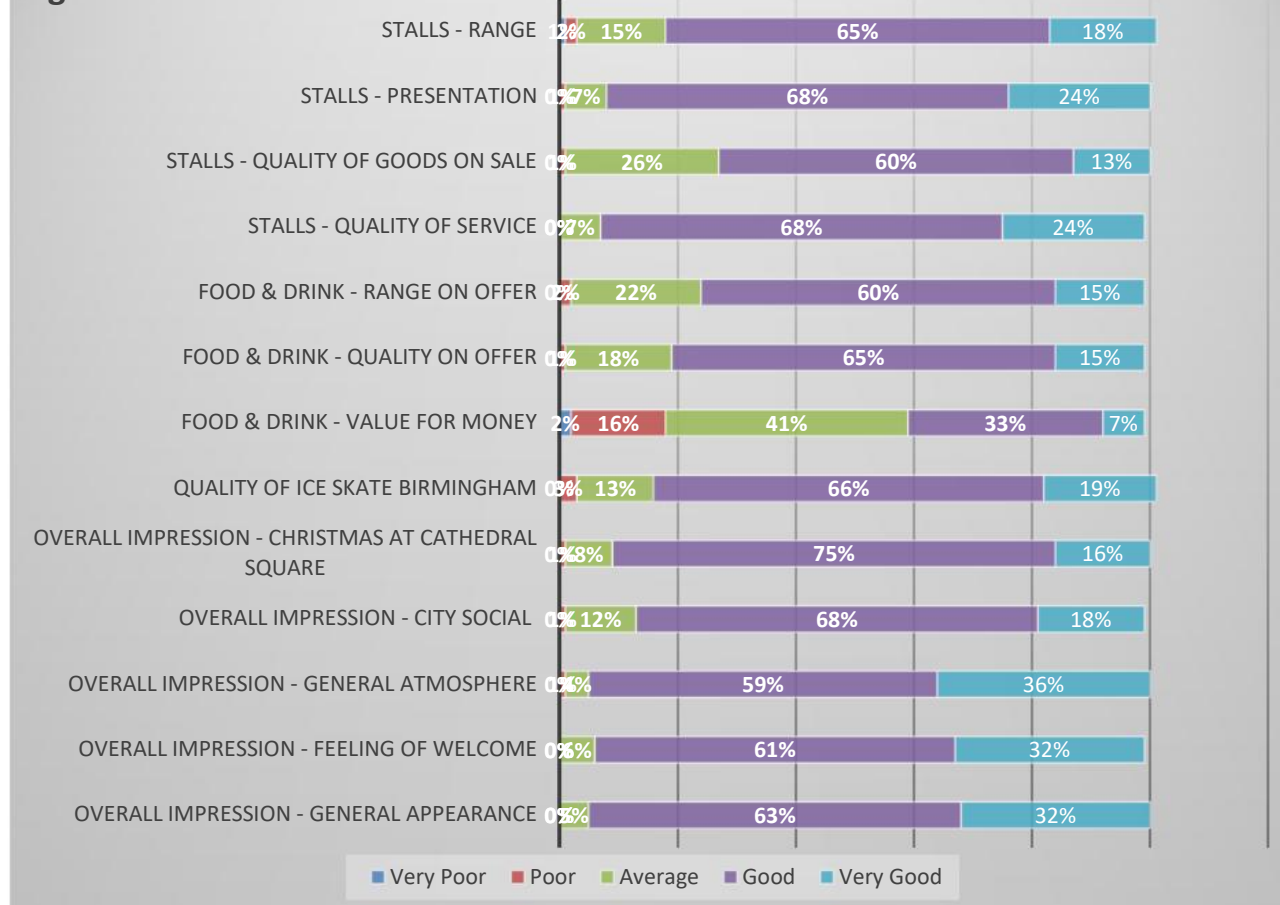
On this scale, a rating above 3.0 indicates a net satisfaction level, whilst any rating below 3.0 indicates a net level of dissatisfaction. Table 15 shows the mean scores awarded by respondents. Encouragingly, most respondents gave positive ratings for the Frankfurt Christmas Market and the facilities it offered.

Table 19: Satisfaction with Event						
	<b>Mean Score</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Very Good</b>
Shopping in Birmingham (Christmas period)	4.10	0%	3%	8%	67%	23%
Shopping in Birmingham (other than Christmas period)	4.15	-	1%	9%	65%	26%
Food & drink at the Market	4.09	0%	1%	10%	69%	20%
Food & drink elsewhere	4.27	-	1%	6%	60%	34%
Birmingham as a place to visit	4.25	-	1%	5%	62%	32%
Pubs & bars	4.22	-	1%	6%	64%	29%
Arts & Culture	3.99	-	2%	13%	69%	16%
Sports – watching	3.87	-	1%	19%	71%	8%
Sports – participating	3.88	-	2%	18%	71%	9%
Events – festivals	3.79	-	2%	25%	64%	8%
Christmas lights around the City	4.13	-	1%	12%	61%	26%
Religious event/festival	3.73	-	3%	37%	45%	15%
Business/conference facilities	4.38	-	1%	8%	44%	47%
Other	3.98	-	2%	14%	68%	16%
City Centre Signposting	3.80	0%	2%	32%	50%	16%

Respondents were also asked for their opinions on the range, quality and value for money of stalls on offer along with the overall impression of the event.

The presentation of the stalls and the quality of service received scored highest with respondents rating this good/very good – 92% respectively. Value for money on food and drink was rated the lowest with 41% rating it average and 18% rating this poor/very poor and this is reflected in the higher scoring seen for food elsewhere in Birmingham compared to food sold at the markets themselves.

**Figure 15: Satisfaction Scores**



When looking at the overall impression of the city and its offer to visitors, much higher scores were achieved with general atmosphere, feeling of welcome, general appearance all scoring 93% and above as good/very good.

Christmas at Cathedral Square (91%), City Social (86%) and the quality of Ice Skate Birmingham (85%) all performed well in terms of overall satisfaction.

Table 20: Satisfaction with Market Stalls and Overall Impression

	<b>Mean Score</b>	<b>Very Poor</b>	<b>Poor</b>	<b>Average</b>	<b>Good</b>	<b>Very Good</b>
Stalls – Range	3.96	1%	2%	15%	65%	18%
Stalls – Presentation	4.15	0%	1%	7%	68%	24%
Stalls – Quality of goods on sale	3.84	0%	1%	26%	60%	13%
Stalls – Quality of service	4.15	0%	0%	7%	68%	24%
Food & drink – Range on offer	3.89	0%	2%	22%	60%	15%
Food & drink – Quality on offer	3.94	0%	1%	18%	65%	15%
Food & drink – value for money	3.27	2%	16%	41%	33%	7%
Quality of Ice Skate Birmingham	4.00	0%	3%	13%	66%	19%
Overall impression – Christmas at Cathedral Square	4.07	0%	1%	8%	75%	16%
Overall impression – City Social	4.03	0%	1%	12%	68%	18%
Overall impression – General atmosphere	4.30	0%	1%	4%	59%	36%
Overall impression – Feeling of welcome	4.25	0%	0%	6%	61%	32%
Overall impression – General appearance	4.26	0%	0%	5%	63%	32%

### 8.3 Comments on the Frankfurt Christmas Market

All visitors were asked if they had any comments to make about the Frankfurt Christmas Market . A variety of comments and suggestions were given including festive/Christmas feeling, great atmosphere, smaller than usual, wider range of stalls needed/less food stalls, great event and love coming, food expensive, well organised, meeting friends and family for a great day out. A full list is shown in Appendix 1.



## 9.0 ECONOMIC IMPACT

### 9.1 Average visitor spend

Visitors were asked to estimate how much they and their party were likely to spend during the whole period of their stay at the Frankfurt Christmas Market. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as estimates. Studies using the diary method of keeping account of spending have shown that visitors' own estimates, as used in this case, are usually on the conservative side.

The following results are based on the expenditure of visitors to the Frankfurt Christmas Market. All other associated spend such as event organisation and business expenditure is not included in these results.

500 groups of people were interviewed during one day of the event totalling 1412 individuals.

Table 21: Expenditure by all Visitors	
<b>Base 500 (Accommodation =64)</b>	
Accommodation	£130.13
Spend - Food & Drink at Market	£30.10
Spend - Food & Drink Elsewhere	£21.91
Spend - Shopping at the Market	£19.81
Spend - Shopping Elsewhere	£52.93
Spend - Travel	£15.89
Spend - Attractions & Entertainment	£6.79
Spend - Small purchase	£1.72
<b>Total</b>	<b>£279.28</b>
<i>Spend per head (mean group size 2.29)</i>	<b>£121.96</b>
<i>Spend per head per night (average no of nights 1.7)</i>	<b>£71.74</b>

All bases=500. Accommodation base=64 includes those staying with friends and relatives

The average spend by all visitors to the Market was approximately £121.96 per person. Visitors staying overnight in Birmingham spent on average £71.74 per person per night

If you exclude the expenditure on accommodation, the highest level of spend per person was on shopping elsewhere (£52.93) followed by food and drink at the market (£30.10). Travel and transport accounted for (£15.89) of overall spend, followed by attractions and entertainment (£6.79) and small purchases (£1.72).

Table 22: Expenditure by Day Visitors	
<b>Base 436</b>	
Spend - Food & Drink at Market	£27.42
Spend - Food & Drink Elsewhere	£17.29
Spend - Shopping at the Market	£15.58
Spend - Shopping Elsewhere	£52.78
Spend - Travel	£13.60
Spend - Attractions & Entertainment	£5.84
Spend - Small purchase	£1.33
Total	£133.84
Spend per head (mean group size 2.3)	<b>£58.19</b>

Table 23: Expenditure by Overnight Visitors (commercial accommodation)	
<b>Base 52</b>	
Accommodation	£160.15
Spend - Food & Drink at Market	47.10
Spend - Food & Drink Elsewhere	52.65
Spend - Shopping at the Market	51.84
Spend - Shopping Elsewhere	45.33
Spend - Travel	34.44
Spend - Attractions & Entertainment	12.49
Spend - Small purchase	3.72
Total	<b>£407.72</b>
Spend per head (mean group size 2.17)	<b>£187.62</b>
Spend per head per night (average no of nights 1.5)	<b>£123.50</b>

Based on those respondents staying overnight in commercial accommodation

## 9.2 Average spend by visitors – Main reason for attending Frankfurt Christmas Market

Table 24: All Expenditure by Main Reason for attending Frankfurt Christmas Market	
<b>Base 315 – accommodation - 42</b>	
Accommodation	<b>£137.33</b>
Spend - Food & Drink at Market	34.02
Spend - Food & Drink Elsewhere	22.44
Spend - Shopping at the Market	22.95
Spend - Shopping Elsewhere	49.48
Spend - Travel	17.83
Spend - Attractions & Entertainment	6.66
Spend - Small purchase	2.01
Total	<b>£299.59</b>
Spend per head (mean group size 2.4)	<b>£124.83</b>
Spend per head per night (average no of nights 1.6)	<b>£78.01</b>

When excluding residents, 73% of visitors' main reason for visiting on the day of interview was for the Frankfurt Christmas Market. If we look at the data by reason for visit, Table 22 shows that the total average spend associated with those whose main reason for visiting the area was for the Market, is higher than the all spend, with an average spend of £124.83 per person per day, which equates to £78.01 per person per night.

Shopping elsewhere saw the highest level of spend accounting for £49.48 of visitor expenditure per person.

### 9.3 Summary of economic impact

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Figures supplied by Birmingham City Council, estimated the number of visitors to the Frankfurt Christmas Market at c4 million. This figure was used to form the basis of the following economic impact of the event.

- The total visitor spend generated by the Frankfurt Christmas Market is estimated as £264,439,533, of which £20,700,072 was on accommodation, and £243,739,461 on all other items. These estimates include all expenditure on accommodation for staying visitors over the duration of their visit.
- The survey responses indicated that 99% of this amount was spent in Birmingham itself and 1% elsewhere outside of the City.
- It is estimated that 74% of the expenditure was additional expenditure related to the Market – generating £192,681,221 for the City and £1,946,275 elsewhere outside the City.
- Total expenditure generated by the Market, including multiplier effects, was £351,552,696 of which 74%, or £258,742,785 was additional.
- The Market spend is estimated to have supported 7,144 jobs – 5,370 directly and 1,774 indirectly – on the basis of an average turnover required per job of £50,000 in the accommodation, catering and retail sectors, and £35,650 in the attractions sector. It should be noted that these are job years since they only occur in the year that the Event takes place. Conventionally, full time permanent jobs are taken as 10 job years.

## 9.4 Gross visitor spend

In calculating the gross visitor spend, a number of factors need to be taken into account. Firstly, there is the coarse total visitor spend, which is calculated by multiplying the mean spend per person per day with the estimated number of visitors to the Frankfurt Christmas Market. Typically, to take into account the accommodation spend, this figure is divided between staying and non-staying visitors (as displayed in the table below).

**The estimated total gross visitor spend for the Frankfurt Christmas Market is £264,439,533. This is based on allocating all of the staying visitors' expenditure on accommodation to the Market.** The estimated geographic allocation of this expenditure, based on survey returns, is shown in Table 25 below.

	<b>Expenditure</b>		<b>Of which: spent in</b>	
	<b>£</b>	<b>%</b>	<b><i>Birmingham</i></b>	<b><i>Elsewhere outside Birmingham</i></b>
Accommodation	£20,700,072	7.83%	£20,493,071	£207,001
Shopping	£121,039,437	45.77%	£119,829,043	£1,210,394
Food & Drink	£83,299,546	31.50%	£82,466,551	£832,995
Attractions	£10,880,971	4.11%	£10,772,161	£108,810
Travel	£25,893,225	9.79%	£25,634,293	£258,932
Other	£2,626,283	0.99%	£2,600,020	£26,264
<b>Total</b>	<b>£264,439,533</b>		<b>£261,795,139</b>	<b>£2,644,396</b>
<b>% of Total</b>	<b>100%</b>		<b>99%</b>	<b>1%</b>

Shopping accounted for the single largest item of expenditure (46%) followed by food and drink (31%). The figures indicate that only 8% of total expenditure was on accommodation.

## 9.5 Step 2 – Multiplied expenditure

The sum of £264,439,533 represents the immediate impact of visitor expenditure on the economy. Some of this expenditure was recycled within Birmingham's economy, in additional expenditure on bought-in services and supplies. We have used the estimates of local linkages derived from previous economic research across the country to arrive at estimates for the amount of multiplied expenditure generated by the Frankfurt Christmas Market, as set out in Table 26.

Table 26: Multiplier effects of the expenditure of visitors to the Frankfurt Christmas Market					
	Round 1 Expenditure	Of which:		% Multiplier	Multiplied Expenditure
	£	Staying Visitors	Day Visitors	To nearest %	£
Accommodation	£20,700,072	£20,700,072	0	75%	<b>£15,525,054</b>
Shopping	£121,039,437	£14,669,567	£106,369,870	19%	<b>£22,997,493</b>
Food & Drink	£83,299,546	£13,745,887	£69,553,658	50%	<b>£41,649,773</b>
Attractions	£10,880,971	£1,793,199	£9,087,772	37%	<b>£4,025,959</b>
Travel	£25,893,225	£4,748,054	£21,145,171	7%	<b>£1,812,526</b>
Other	£2,626,283	£551,122	£2,075,161	35%	<b>£919,199</b>
<b>Total</b>	<b>£264,439,533</b>	<b>£56,207,901</b>	<b>£208,231,632</b>		<b>£86,930,003</b>
<b>% of Total</b>	<b>100%</b>	<b>7%</b>	<b>93%</b>		

The total economic impact including the multiplier is shown in Table 27 below

Table 27: Total economic impact including the multiplier			
	Round 1 Expenditure	Multiplied Expenditure	Total
Accommodation	£20,700,072	£15,525,054	£36,225,125
Shopping	£121,039,437	£22,997,493	£144,036,929
Food & Drink	£83,299,546	£41,649,773	£124,949,319
Attractions	£10,880,971	£4,025,959	£14,906,930
Travel	£25,893,225	£1,812,526	£27,705,751
Other	£2,626,283	£919,199	£3,545,482
<b>Total</b>	<b>£264,439,533</b>	<b>£86,930,003</b>	<b>£351,369,536</b>

The geographic allocation of this expenditure is shown in Table 28.

Table 28: Geographic allocation of Round 1 and Multiplied Expenditure			
	Total	Of which:	
	£	<i>Birmingham</i>	<i>Elsewhere outside Birmingham</i>
Accommodation	<b>£36,225,125</b>	£35,862,874	£362,251
Shopping	<b>£144,036,929</b>	£142,596,560	£1,440,369
Food & Drink	<b>£124,949,319</b>	£123,699,826	£1,249,493
Attractions	<b>£14,906,930</b>	£14,757,861	£149,069
Travel	<b>£27,705,751</b>	£27,428,693	£277,058
Other	<b>£3,545,482</b>	£3,510,027	£35,455
<b>Total</b>	<b>£351,369,536</b>	<b>£347,855,841</b>	<b>£3,513,695</b>

To estimate the employment effects of this expenditure, we applied estimates of turnover required per job derived from earlier economic research across the country to calculate the number of jobs – full-time employee (FTE) equivalent – supported by the Frankfurt Christmas Market. The turnover per job estimates by sector are as follows:

- Accommodation: £50,000;
- Shopping: £50,000;
- Food & drink: £50,000;
- Attractions: £35,650;
- Travel: £50,650.

Based on these estimates, the employment effects of the Frankfurt Christmas Market expenditure are as shown in Table 29 below.

Table 29: Employment effects of Round 1 and multiplied expenditure			
	Round 1 Expenditure	Multiplied Expenditure	Total
Accommodation	414	311	<b>725</b>
Shopping	2421	460	<b>2,881</b>
Food & Drink	1666	833	<b>2,499</b>
Attractions	305	113	<b>418</b>
Travel	511	36	<b>547</b>
Other	53	18	<b>71</b>
<b>Total</b>	<b>5370</b>	<b>1771</b>	<b>7,141</b>

NB: Number may not add up due to rounding of figures

The geographical allocation of these jobs is shown in Table 30 below.

Table 30: Geographical location of jobs supported by Round 1 and multiplied expenditure			
	Round 1 Expenditure	Multiplied Expenditure	Total
<b>Birmingham</b>	5,316	1,753	7,069
<b>Elsewhere outside Birmingham</b>	54	18	72
<b>Total</b>	<b>5,370</b>	<b>1,771</b>	<b>7,141</b>

### 9.6 Step 3 – Additional expenditure related to the event

The next issue to be addressed is how much of the expenditure was new or additional, as opposed to having been displaced from expenditure which would have occurred anyway. In total, 72% of respondents stated that they would otherwise have stayed home or gone to work, while 20% stated that they would have done something else/visited Birmingham. The remaining respondents stated that they would have visited another part of the West Midlands (5%) or visited another part of the West Midlands Region (1%) whilst 2% would have gone somewhere else outside of the West Midlands Region.

Based on these survey responses, we can estimate that 74% of total expenditure – or approximately £194,627,496 of Round 1 expenditure and £63,980,483 of multiplied expenditure – **was additional spend related to the Frankfurt Christmas Market** by people who would not otherwise have been spending **on the day of the Market**, while 26% of total expenditure would have been spent doing “something else” in Birmingham, the West Midlands or the West Midlands Region and so would have occurred anyway within the City and Region, and was displaced from other activities. In summary, additional expenditure related to the Frankfurt Christmas Market is as set out in Table 31.



Table 31: Additional expenditure related to the Frankfurt Christmas Market	
Gross Visitor Spend	<b>£264,439,533</b>
Multiplied Expenditure by Sector	<b>£86,930,003</b>
Total Expenditure generated by the Frankfurt Christmas Market	<b>£351,369,536</b>
Additional visitor expenditure related to the event	<b>£194,627,496</b>
Additional multiplied expenditure	<b>£63,980,483</b>
	<b>£258,607,979</b>
Geographic allocation:	
Birmingham	<b>£256,021,899</b>
Elsewhere outside Birmingham	<b>£2,586,080</b>
	<b>£258,607,979</b>

The allocation of additional visitor expenditure related to the event by sector, and the total jobs supported by this expenditure by sector, is shown in Table 32.

Table 32: Additional jobs related to the Frankfurt Christmas Market		
	<b>Additional Expenditure</b>	<b>Additional Jobs</b>
Accommodation	£26,661,692	<b>533</b>
Shopping	£106,011,180	<b>2120</b>
Food & Drink	£91,962,699	<b>1839</b>
Attractions	£10,971,501	<b>308</b>
Travel	£20,391,433	<b>403</b>
Other	£2,609,475	<b>52</b>
<b>Total</b>	<b>£258,607,979</b>	<b>5,255</b>

The geographic location of the additional expenditure and jobs related to the Frankfurt Christmas Market is shown in Table 33 below.

Table 33: Geographic location of additional expenditure and jobs related to the Frankfurt Christmas Market		
	<b>Additional Expenditure</b>	<b>Additional Jobs</b>
Birmingham	£256,021,899	5,203
Elsewhere outside Birmingham	£2,586,080	53
<b>Total</b>	<b>£258,607,979</b>	<b>5,255</b>

## 9.7 Total economic impact

Table 34 summarises the total economic impact of the Frankfurt Christmas Market at the two levels.

Table 34: Total Economic Impact of the Frankfurt Christmas Market			
	<b>Total</b>	<b>Birmingham</b>	<b>Elsewhere outside Birmingham</b>
<b>Gross Visitor Spend</b>	<i>£264,439,533</i>	<i>£261,795,137</i>	<i>£2,644,395</i>
<b>Multiplied Expenditure</b>	<i>£86,930,003</i>	<i>£86,060,703</i>	<i>869,300</i>
<b>Subtotal:</b>	<b><i>£351,369,536</i></b>	<b><i>£347,855,841</i></b>	<b><i>£3,513,695</i></b>
<b>Total jobs</b>	<b><i>7,140</i></b>	<b><i>7,069</i></b>	<b><i>71</i></b>
<b>Additional Expenditure</b>	<i>£258,607,979</i>	<i>£256,021,899</i>	<i>£2,586,080</i>
<b>Additional Jobs</b>	<b><i>5,255</i></b>	<b><i>5,202</i></b>	<b><i>53</i></b>

As shown in Table 34:

- The total Round 1 economic impact of the event was £264,439,533 of which £261,795,137 was generated for Birmingham and £2,644,395 Elsewhere outside of Birmingham.
- Round 2 or multiplied economic impact of the event by sector was £86,930,003;
- In total, Round 1 and multiplied expenditure amounted to £351,369,536 of which £258,607,979 represented additional expenditure generated by the event (74%), while £92,761,557 (26%) would have been spent in Birmingham whether or not the Frankfurt Christmas Market had taken place. Of the additional expenditure, the total amount of £256,021,899 was spent in Birmingham itself and £2,586,080 elsewhere outside the City of Birmingham.
- based on the Cambridge Econometrics' estimates of average turnover per full-time equivalent (FTE) job in each sector, the expenditure generated by the Frankfurt Christmas Market was sufficient to support 7,140 jobs – 5,370 directly and 1,770 indirectly – of which 5,255 FTE jobs were additional, with 5,203 located within Birmingham and 53 elsewhere outside of Birmingham.

# APPENDIX 1

<b>Are there any comments you would like to make about the Frankfurt Christmas Market? – Excludes those responses that said no/none/nothing to comment on.</b>
Great event to visit, amazing food
Very busy, no one wearing masks, quite worrying
Great place to be
Great atmosphere
Great place and atmosphere
Great for a change, good atmosphere
Lovely, worth the visit
Overpriced throughout the market
Great to be here
Looks ok, very busy
Interesting and set in a lovely setting with nice old buildings
I think it's good, one of the best ones I've been to
I'd like to see more craft stalls / individual homemade crafts
It needs to continue, maybe cheaper food prices
Disappointed at the variety of stalls and lack of seating
Market isn't as long as we were expecting
Really overcrowded especially round the food stands
It just looks pleasant
Too busy on Saturdays, could use Chamberlain Square a nice big area with nothing here all squashed along the walkways
Very expensive but enjoyable
Should be advertised more, I've not heard about it advertised anywhere
Very expensive
Needs a better variety of stalls and not that expensive
The cleanliness is quite good, sausages don't look appealing, security is good
Expensive
Too many food cabins not enough crafts
Give staff free food
We come every year, not as good this year
Really lovely
Bit confusing to find way about
Festive feeling
Good
Quiet
Very nice but quiet
Keep it going
Good
Indoor bit good
Good
Fine but too many beggars
It's good here
Really good
Good
It's good
Beautiful but nowhere to sit

Very nice here
Smaller than expected
Love it
Nice but expensive
Enough ordinary shops in Birmingham without market we should support shops that are here. enough with market
It's great
A lot of food stalls, not as big this year
Everything expensive
So many food stalls
Very disappointing, not homemade stuff here
It's really nice
Really nice
A bit smaller this year
Great atmosphere
Not as big as usual
Really good event
More heaters put in eating area
Nice and quiet and clean
Love it
Like it but not as many stalls
Good
Very nice and clean
No cider here
Not much Gluten free food
Very good
It's good
Lack of vegetarian food
Less busy, good spaced out
Always well done
Happy, well done
Like music
Very good, mulled wine nice
Lovely here
Lovely but need more variety
Nice
Not as busy as last year
Need more variety of stalls
Not as much variety as previous years
Very good like it
Really like it, better than Manchester
Nice but too busy, too crowded
Well put together
Not as big as before
Not so many crafts here this time
Really nice, decorations are nice
Lot smaller than year before

It's very Christmassy
Quaint
Very good
Lovely it's quiet
Pretty and Christmassy
Not enough veggie food
Same every year need more variety
Very good
Atmosphere good
A lot less stalls than there used to be, not much to buy
Good
Keep it going
Very Christmassy think its lovely but did think there would be more craft stalls
Love the atmosphere
It's too expensive
More market
Great so far
Not so many stalls need more craft stalls
A lovely shopping day out, very festive
Spread out more. But a bit pricey.
Good
Lot better than last time.
Christmassy. Love it.
Very festive
Nice to see stalls other than food and drink.
Lovely
Brilliant. Love it.
Good
Fabulous. Not as busy. Not so many stalls though.
Very festive. Good atmosphere.
Lovely
Good would recommend it
Great. It's lovely.
Nice atmosphere
Lovely Day
No vegetarian food
Lots of food and drink. Not much craft stalls.
Not as many this time as before. Fewer stalls.
It's nice
Nice Atmosphere
It's ok. Not too busy.
Good. Like it.
Need more music
Well organised.
Lives up to expectations
Glad to have it back. Christmassy.

Quiet
Less stalls. Less choice. Not many craft stalls.
Good. It's rare with all what's going on.
Good. Like it.
Lots of Christmassy stuff. Not as many stalls this time.
Looks good but pricey
Good
Love it
Brilliant
Too commercialised
It's great
Less stalls. Music team gone because of covid.
Very Good
Expensive Food
Good for the city.
Nice atmosphere
I think it's laid out really nicely. Been quite respectful.
Nice event
It's a very lovely place to visit for Christmas
No and really enjoy coming for the atmosphere
Very colourful. Nice festive trip.
Lovely. You enjoy yourself. Very authentic.
Lots to see and do
Nice atmosphere. Could do with more toilets. More seats too.
Nice festive atmosphere. We enjoy our trip here.
It's very festive. Great atmosphere.
It's a nice day out.
The stalls could be more reasonably priced. Everything is quite expensive on the stalls.
Colourful event. Price of stalls can be a bit pricey though
Nice Day Out
Could be more affordable for family.
Keep it going on the market.
Really nice
Enjoyable family day.
A great start to the Christmas period.
A fabulous atmosphere. Gets you in to Christmas spirit.
Good Christmas atmosphere
A great way to start Christmas
Christmas fun day out
A Christmas day out together
Enjoyable relaxing Saturday
An enjoyable family time
Fun and festive
The grandchildren love it. We are all having a good time.
A great day out. Something festive.
Good fun.

A great way to begin Christmas
It's great. Good atmosphere.
Very festive
Very festive. Good atmosphere but very cold.
A great day out.
It's good
Good atmosphere
Very festive
A change. Nice to enjoy new festive times.
A great place to shop and plenty going on.
Cold but very nice. Very festive.
Gets you in the Christmas mode.
Lovely atmosphere
Well-spaced out
Not as big as used to be.
Used to live in Birmingham. Been lots of times.
Good to see it back
Love it here
Really good event.
Good event
Enjoy it
Really good event
Lot of Brummie accents on stalls
Brilliant
nice atmosphere
Need more stalls. But is pretty.
Like it
It's good
Too expensive
Nicer than Plymouth
Lot smaller than past times
Too many food stalls. Not enough craft stalls.
Wonderful selection
More independent stall
Too expensive
Very poor. Museum not open. Too many food stalls. No atmosphere. Too commercialised. I will go on carousel.
Love it
Stalls should be closer together. Too spaced out.
Lower prices
More signage to direct to the market
Change variety of glasses that hot chocolate come in as I collect them.
Seems beautiful. Just passing through for work.
Back to what it was pre-covid. More stalls. Less food and drink.
More craft and artisan stalls
More stalls. But looks attractive.
More stalls that aren't food and drink



It's a bit spread out. Not quite as good.
It's a bit quieter this year
A bit quieter this year. Could do with more normal stalls that are less expensive.
The market was ok. Too many food shops.
Need more stalls. Not just beer and bratwurst.
A great day out. Especially Christmas time.
Gets you in the festive spirit
Enjoyable but windy and cold.
A good festive day out for Christmas.
It's a bit cold but very festive.
Lots to see for the kids.
Very festive
Christmas has arrived
Kids love it.
Enjoyable festive time
Festive and fun
It's lovely
A very nice change and tells you Christmas is on its way.
A lovely day out. Something to look forward to.
Good atmosphere
Glad it's back
Very Christmassy. Good atmosphere. Lots to see.
Good festive day out visiting Birmingham.
The same every time
Very festive. Enjoyable atmosphere.
A lovely day out with my husband
Lovely atmosphere
A great day out. A little extra for your visit.
It's great you know. Christmas is nearly here.
Christmas has arrived
Lovely atmosphere
A great day out
A good start to the festive season
Very festive day out for everyone.
A good festive day out. Something different at this time of the year.
Great to have fun with your mates.
Just having a walk around. Very festive.
A great day out at Christmas for the children
A great day out especially if organised by a group
Plenty to see and do. Great to shop the market and shops.
It's great fun. Festive day out.
Enjoyable. My granddaughter is loving it.
A fun festive day out
A good day out with my daughter
A great day out. Nice to get back to normal life after last 18 months
Plenty to see and do. The children love the Christmas atmosphere.

Meeting a friend to join in the festive time.
A well organised trip and a good festive atmosphere.
A great festive day out with the family.
Lots to see and do
plenty to see
A great Christmas day out
Very Christmassy
A lovely day out in town
Spent a great day with my youngest daughter. Good family time.
A good day out for the children and all of us as a family
Fun for everyone
Birmingham is a great place to Christmas shop, lots going on
Festive
Very festive
Festive, having a good day out
Festive day out and with plenty to see and do
A good start to the festive week ahead
Great day to meet up with friends
A great way to start Christmas
Very Christmassy
It's all good fun but very cold and foggy
Enjoyable Christmas day out
Skating was great, plenty for children to do
Very well organised, good Christmas fun
We are having a good time but foggy and cold
Christmassy
A good day out
Something different, gets you in the mood for Christmas
Good festive start for your Christmas shopping and for all the fun to come
A great family day out before Christmas
A nice way to Christmas shop
Very festive, a good times had by all
A great family day out
Kids love it
A great day out
A good day out
Great time for families
Very festive
Very cold but still good
A good start to Christmas
Very enjoyable, good fun
Having a good time
A good atmosphere
Good atmosphere, Christmas is nearly here
A good festive atmosphere
Very festive

Festive and fun
Happy time, good atmosphere
Makes your shopping day special
A great day out
Plenty going on
A pleasant way to start Christmas celebrations
My grandson loves it, a great Christmas atmosphere
A good day out
The grandchildren love it
Great day out
A Christmas day out
Very Christmassy
Lovely, not as many stalls, lots of food not so many craft stalls though
Excellent
We do it most years - great atmosphere
Great tradition
Nice atmosphere, nice to come to its Christmassy
Needs more stalls selling small gifts, too many food stalls
The cathedral area was lovely, we enjoyed that
Colourful, less expensive
Could be more craft type stalls
It looked tired; the streets didn't look clean
Nice market, atmosphere good
Lack of atmosphere here
Very interesting to see not as many stalls, impressive though
Lovely very enjoyable
Very enjoyable
Nice place to visit, very Christmassy
Nice atmosphere
Enjoyable
Good, very good
Need caterers to cater for children with children's portions, not enough seats, also need an area for children and parents to sit
Very Christmassy, nice trip
Looks all a bit the same as past years
Could do with more affordable stalls, very expensive
Same as ever, nothing like real German market
Sad about empty shops - I love coming but worried about 'clean air' zone
Really impressed, compares favourably to elsewhere I've been
Very nice
Enjoyable trip
Nice visit, Christmassy, need more seating areas
The journey to the hotel was so bad because of road works, a 6 minute journey to an hour and a half and we're going to have a fine as we drove in the bus lane because of road works
Good atmosphere, Christmassy
Disappointing lack of seats anywhere, shortage of staff in restaurant
Road works very bad

Nice Christmassy
Nice
No we're happy we came
Not that good, not a lot from Germany
Very exciting place, welcoming great atmosphere
Pointless, costly
Nice atmosphere