VisitEngland

Understanding Visitor Satisfaction 2013-14

Debrief by TNS
at VisitEngland

11th November 2014

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Understanding Visitor Satisfaction, 2013-14

What we will cover:

- Introduction
- Tracking performance over time
- Headline performance by segment
- The drivers of satisfaction and changes over time
- The building blocks – destination performance
- Destination type analysis

Introduction

Background
Methodology & Survey Details

Visitor Satisfaction tracking is a key element of the Strategic Framework for Tourism

The Vision

To maximise tourism's contribution to the economy, employment and quality of life in England.

The Objectives

This Strategic Framework aims to achieve four interdependent objectives. These have been developed through wide consultation with the industry and are defined by four pillars of work, designed to address the opportunities and challenges for England's visitor economy.

Objective 01	To increase England's share of global visitor markets.
Objective 02	To offer visitors compelling destinations of distinction.
Objective 03	To champion a successful, thriving tourism industry.
Objective 04	To facilitate greater engagement between the visitor and the experience.

	Action	Lead Responsibility	Partners	Timescale (years in life of Plan)
02d	Create an England satisfaction survey which provides a national benchmark and greater consistency of data at regional, destination and local levels. across England	VisitEngland	English Tourism Intelligence Partnership; Tourism Intelligence Unit	1-3

Raising satisfaction levels in the visitor experience and encouraging more UK residents to enjoy the destinations on their doorstep are key elements in increasing visitor spend and contributing to the 5% growth target.

VE Brand and Satisfaction tracker:
What is it?

What?

- An online survey collecting information about "brand England," VE campaigns and visitor satisfaction (running since October 2009)

Who?

- A representative sample of English residents who are holiday takers (1+ night in paid accommodation, anywhere in the world) and non-rejectors of England

How Many?

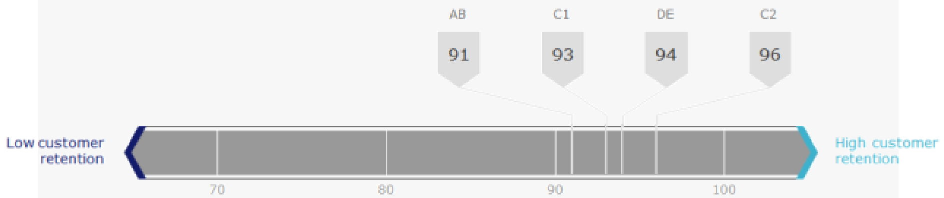
- 100 per week - 5000 over 12 months
- This report: July 2013-June 2014 (12 months)
  - 4,992 respondents, 86% have taken a trip(s) – 4,279 trip takers

Tracking Performance over Time

Visitor Experience TRI*M - going beyond traditional measures of satisfaction

Headline Satisfaction Index

- **Key Performance Indicator** amongst 'last 12 months' visitors to benchmark and monitor the strength of visitor retention



Understand what's driving satisfaction

- **Identifying action areas for improvement:** Satisfaction levels with specific elements of the tourism product

High level strengths

A31. Unspoilt countryside

Medium level strengths

A16. Good quality accommodation
A30. Interesting towns and villages to visit
A19. Good quality food, drink and dining
A05. Clean and tidy environment
A02. Welcoming and friendly people
A33. Clean and well-maintained beaches
A04. A place where I feel safe and secure

Low level strengths

A26. Opportunities to see famous buildings and monuments
A25. Opportunities to visit museums/galleries and contemporary arts
A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance

4 key questions to index the visitor experience in the destination

The Visitor Experience TRI*M Index has been based on the answers given to 4 key questions (see below). They are each asked for the specified main destination of their most recent trip then netted for an overall England score

- How would you rate your overall experience of DESTINATION during your most recent holiday or short break?
- Based on your experiences during this trip, to what extent would you recommend DESTINATION as a destination to friends and family?
- How likely are you to take another holiday or short break in DESTINATION during the next few years?
- Given what you know about places to visit, how would you rate DESTINATION compared to other destinations for holidays or short breaks?

Overall performance

Likelihood to recommend

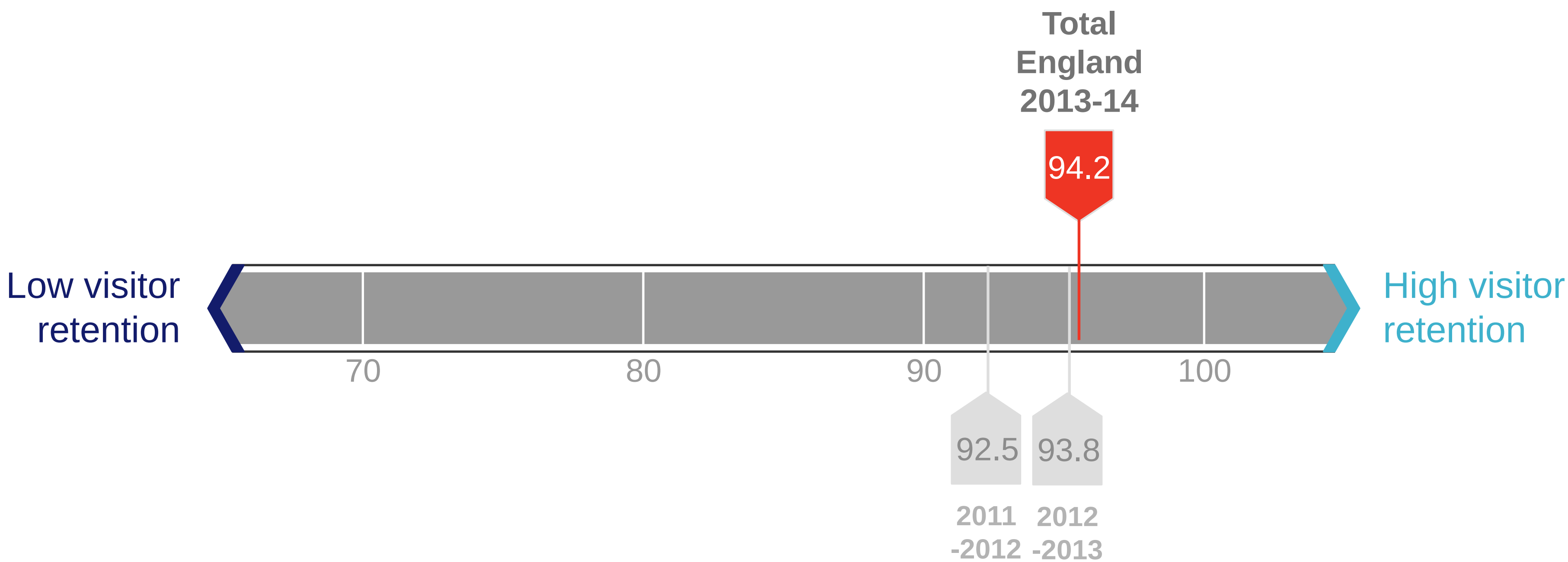
Likelihood to revisit

Competitive advantage

Visitor Experience ***TRI*M*** **Index**

Visitor Experience TRI*M Index
OVERALL ENGLAND – 4,279 interviews: July 2013-June 2014
Some evidence of small but gradual increases in satisfaction levels over last 4 years

Overall Performance	Likelihood to Revisit	Competitive Advantage	Likelihood to Recommend



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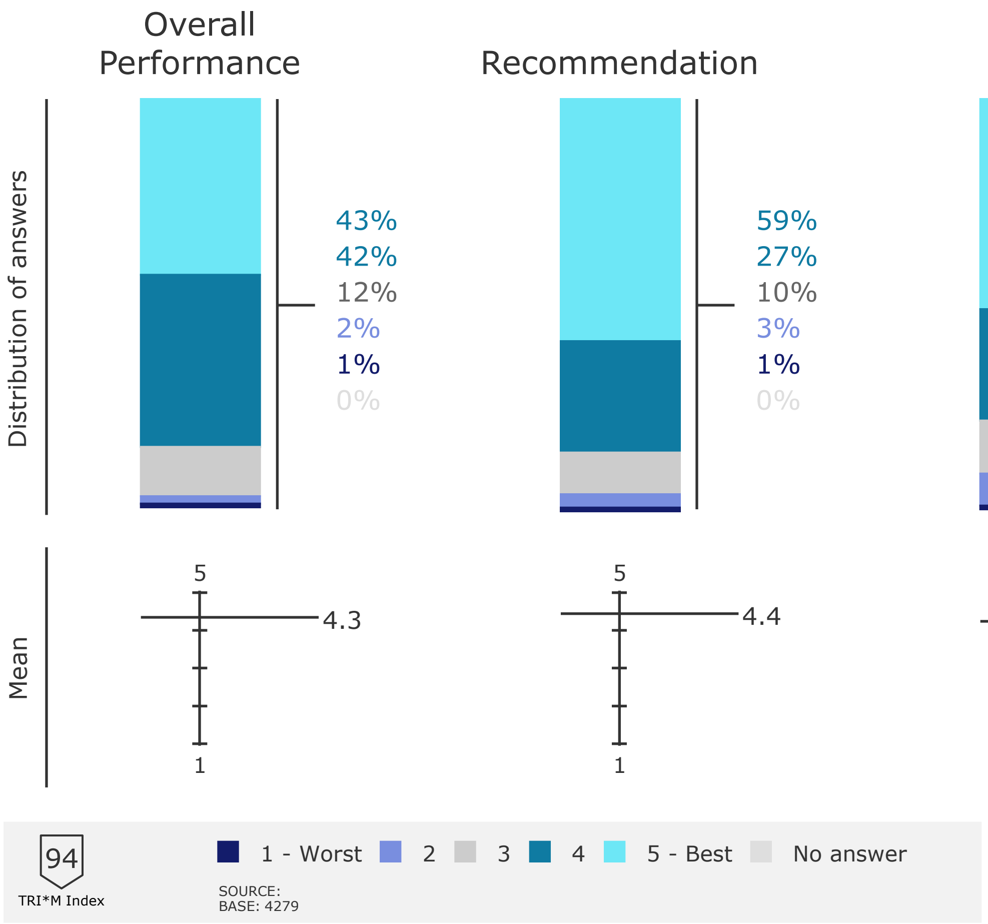
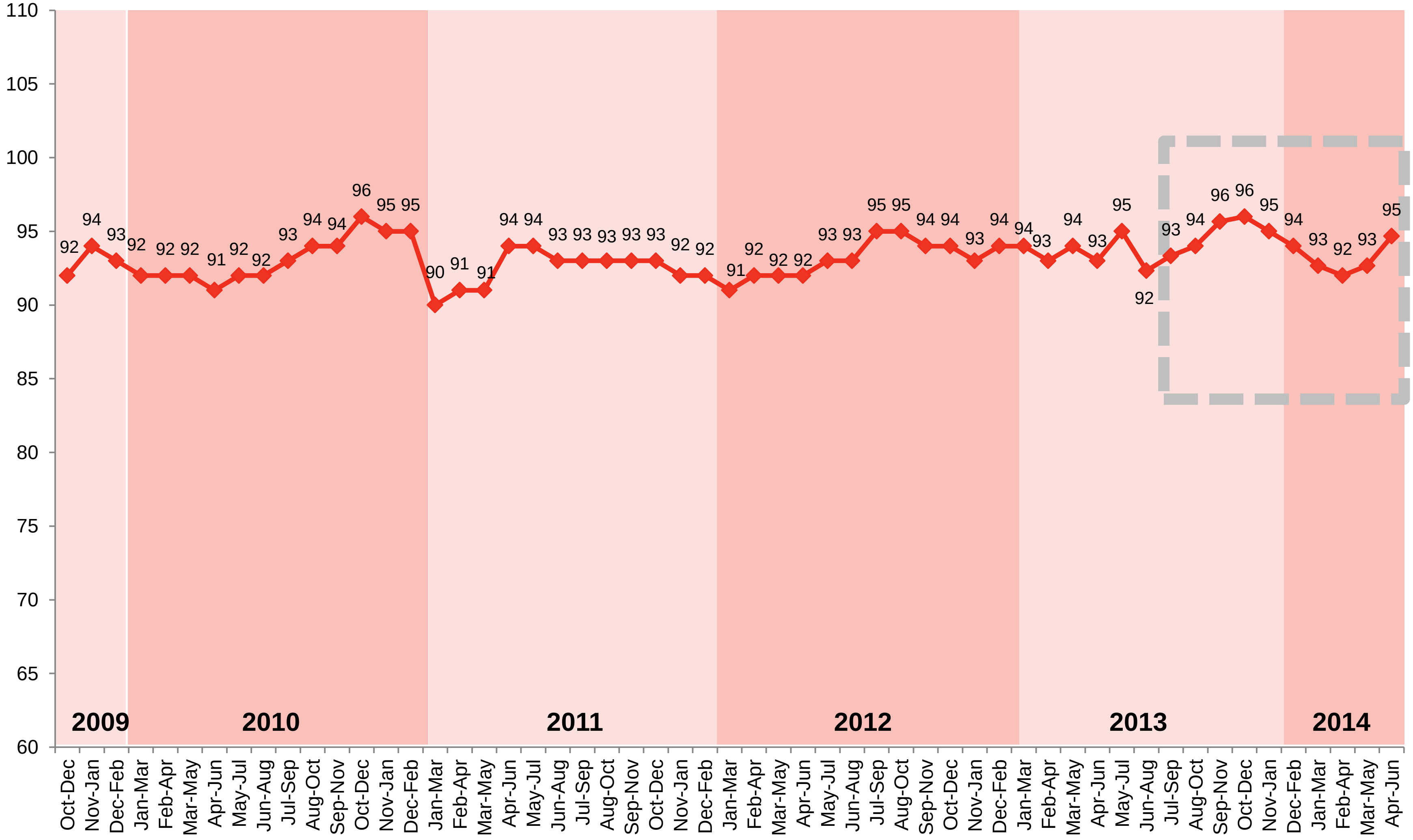
And how does this break down? Recommendation remains the main driver followed by overall performance and revisit.



Encouragingly, a steady, year-on-year increase in 'top box' responses for Performance (41%, 42% and 43% respectively) – appears to be the main driver of improvements

Using three-month rolling averages, the relative stability of the indices is clear although the last 12 months have been more variable



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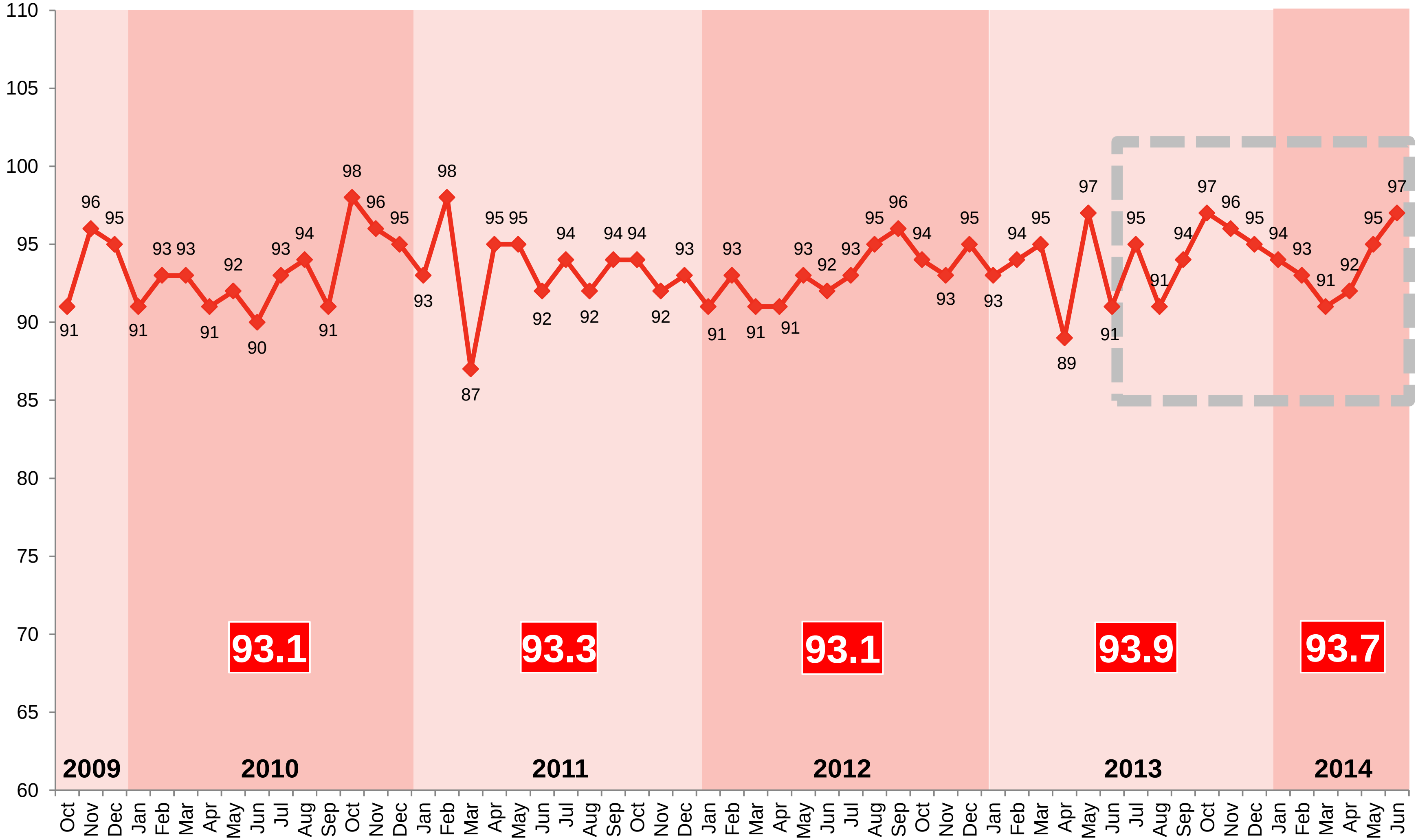
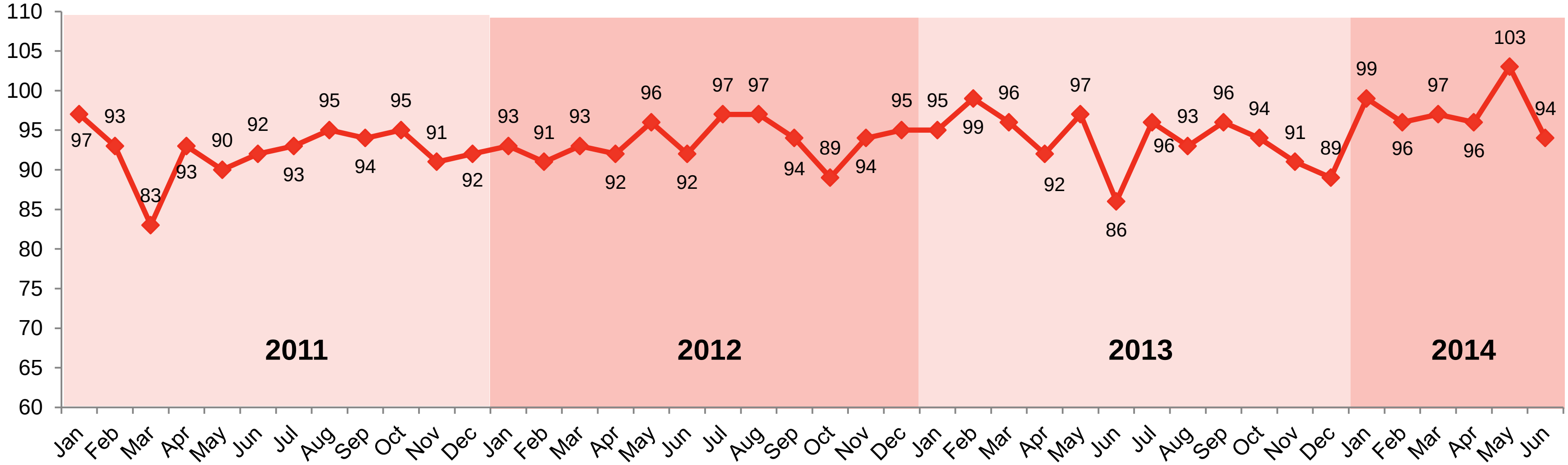
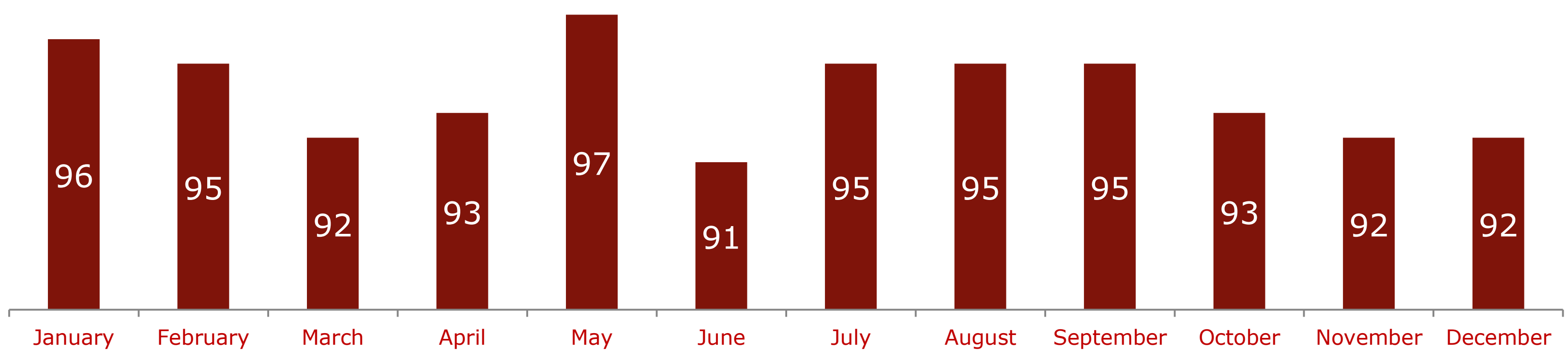
There are greater variations month-on-month but the 12 month annual indices have risen slightly over the period from 93 to 94



Analysis by month when trip taken suggests peaks in May around Bank Holidays. Poor weather in recent years may explain subsequent dips in the following month



2011-2014 averages



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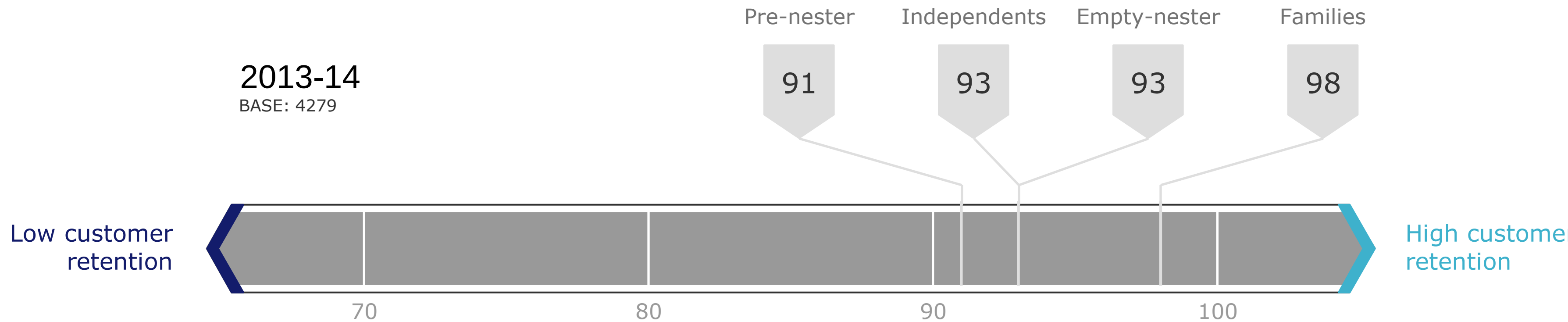
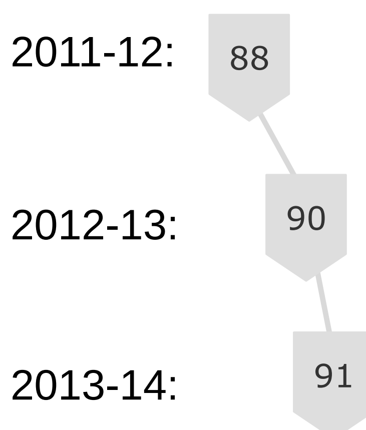
Headline performance by segment

Visitor Experience TRI*M Index Lifecycle

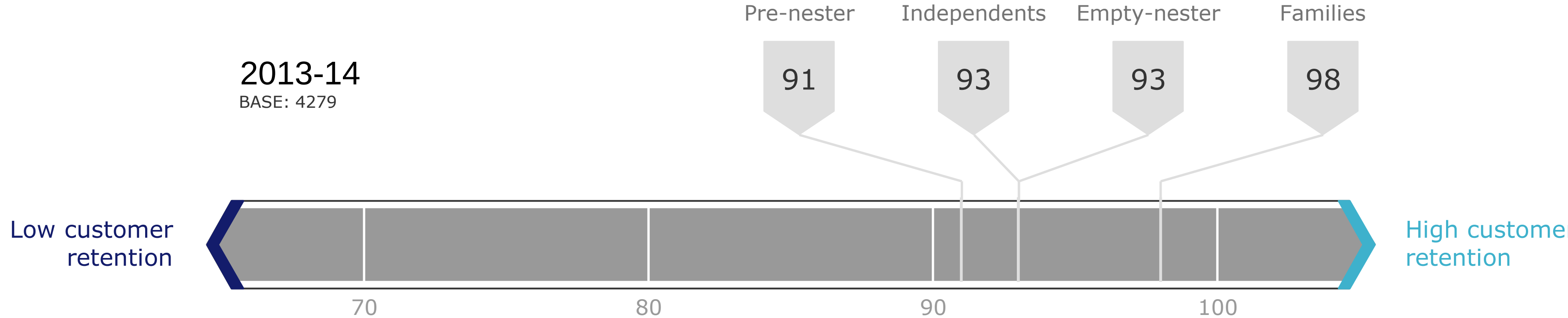


Pre-Nesters

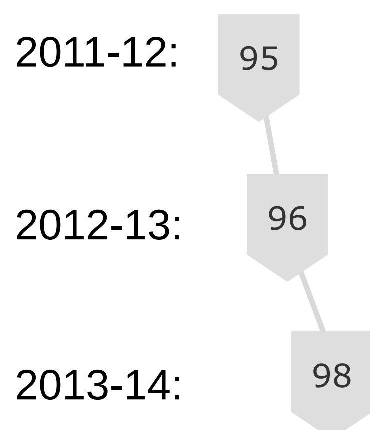


Evidence of increasing satisfaction among Pre-Nesters

Visitor Experience TRI*M Index Lifecycle



Families



Year on year increases in satisfaction among families

Visitor Experience TRI*M Index Lifecycle

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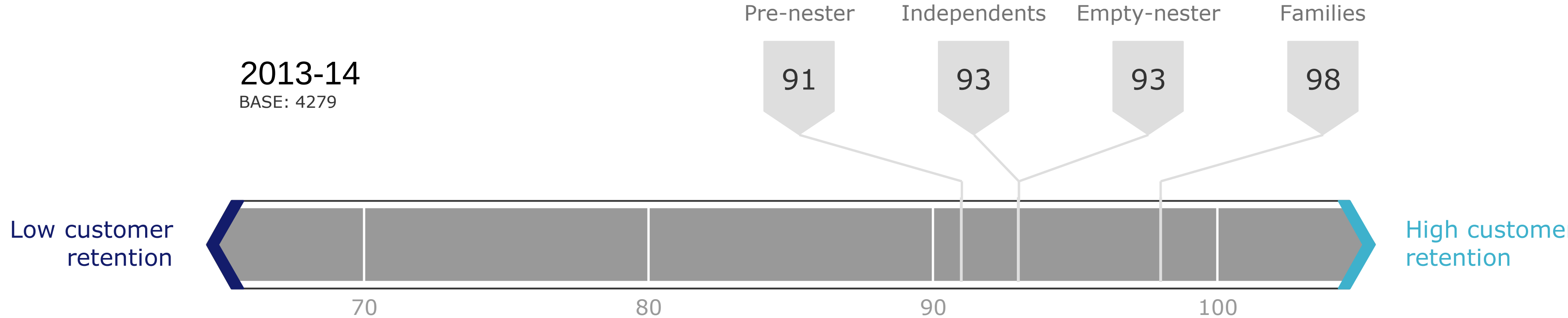


Independents

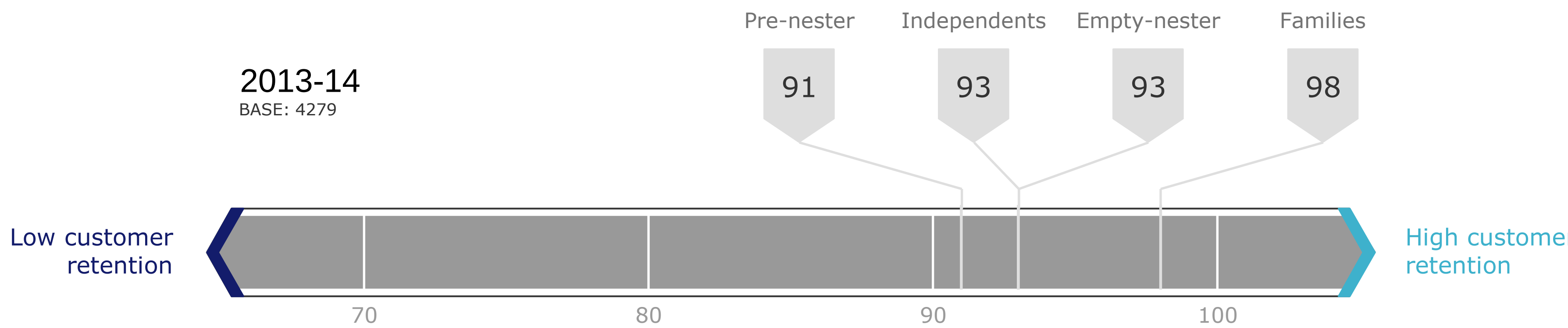
2011-12: 94

2012-13: 95

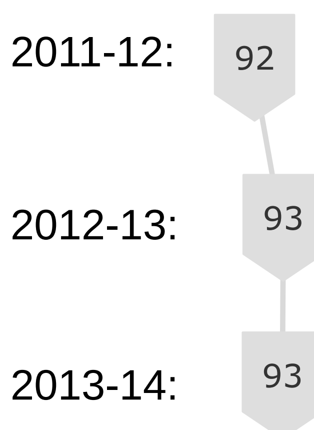
2013-14: 93

Lower satisfaction rating among Independents than in the previous 2 years

Visitor Experience TRI*M Index Lifecycle



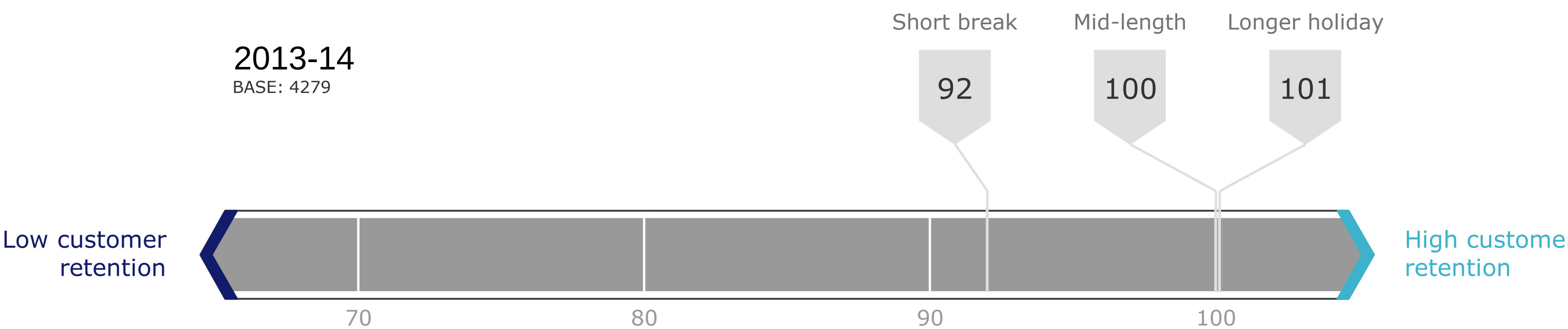
Empty Nesters



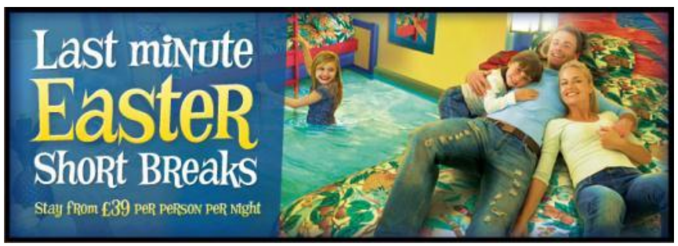
Consistent levels of satisfaction among Empty Nesters

Visitor Experience TRI*M Index
Holiday Type

2013-14
BASE: 4279



Short Breaks



2011-12: 91

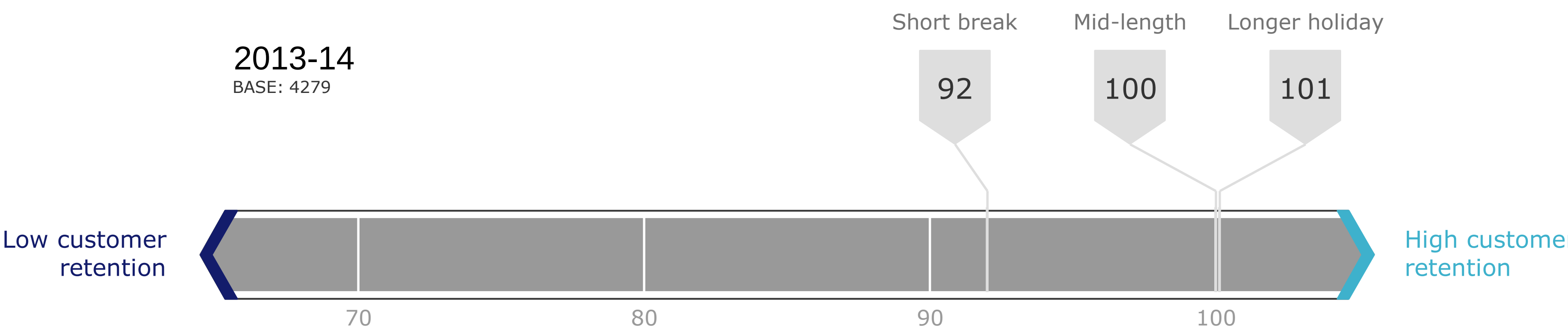
2012-13: 92

2013-14: 92

No major movement in satisfaction with short breaks

Visitor Experience TRI*M Index
Holiday Type

2013-14
BASE: 4279



Mid-length holidays

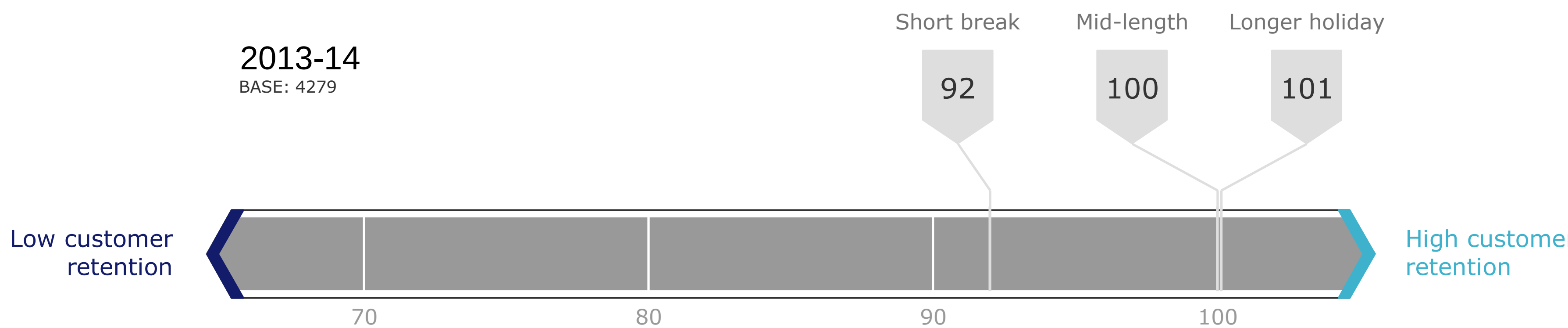
2011-12: 96

2012-13: 98

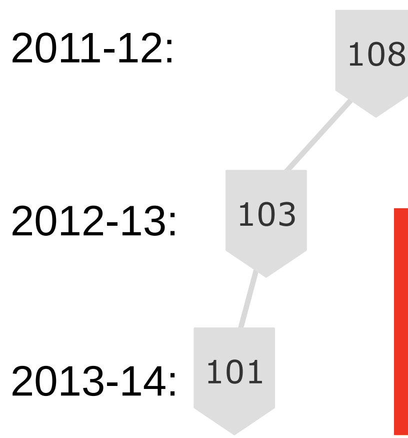
2013-14: 100

Steady improvement in satisfaction levels on mid-length holidays

Visitor Experience TRI*M Index
Holiday Type



Longer holidays

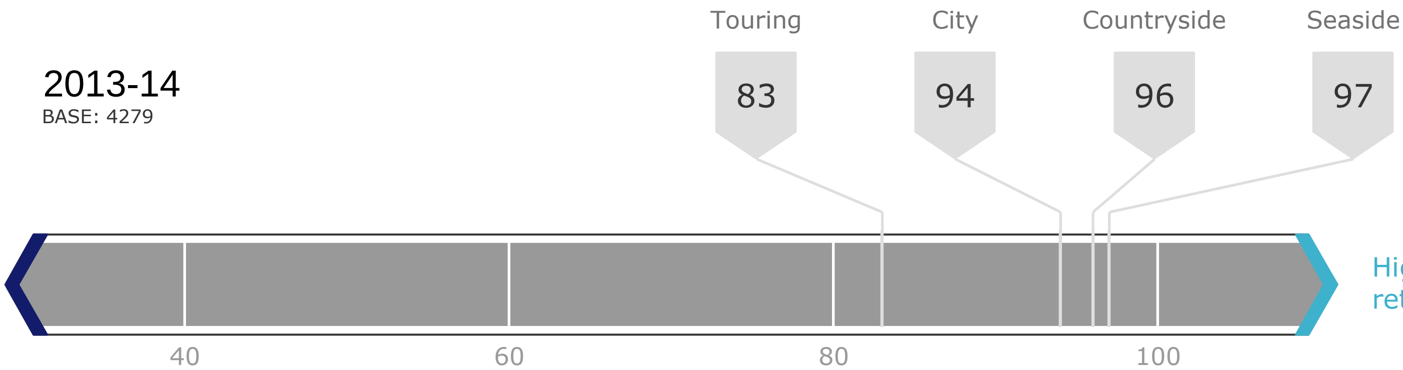


Although remaining high, evidence of declining levels of satisfaction amongst those on longer holidays

Visitor Experience TRI*M Index
Location of Holiday

2013-14
BASE: 4279

Low customer retention



High customer retention

City breaks

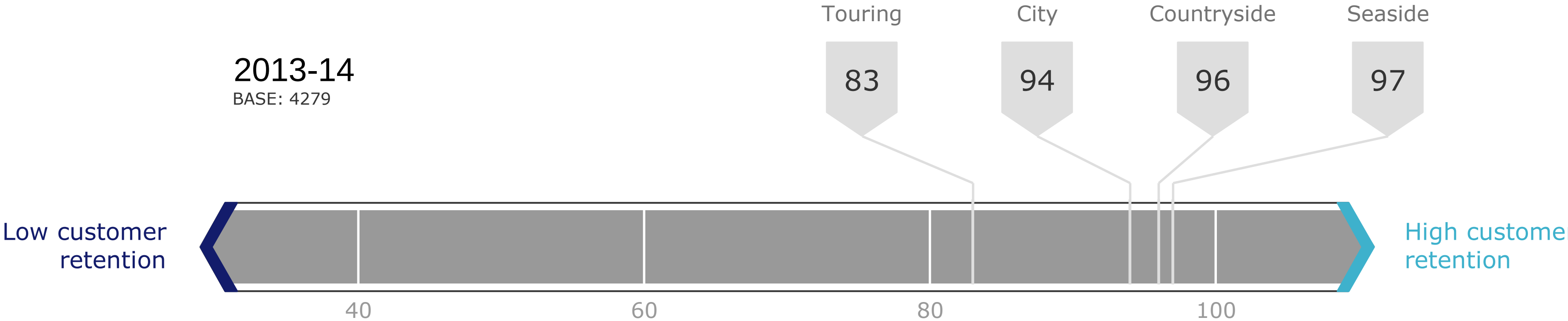
2011-12: 91

2012-13: 93

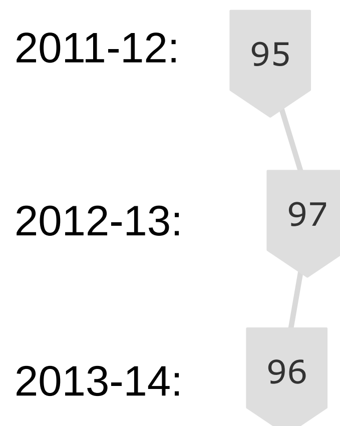
2013-14: 94

A steady increase in satisfaction on city breaks in last 3-4 years

Visitor Experience TRI*M Index
Location of Holiday



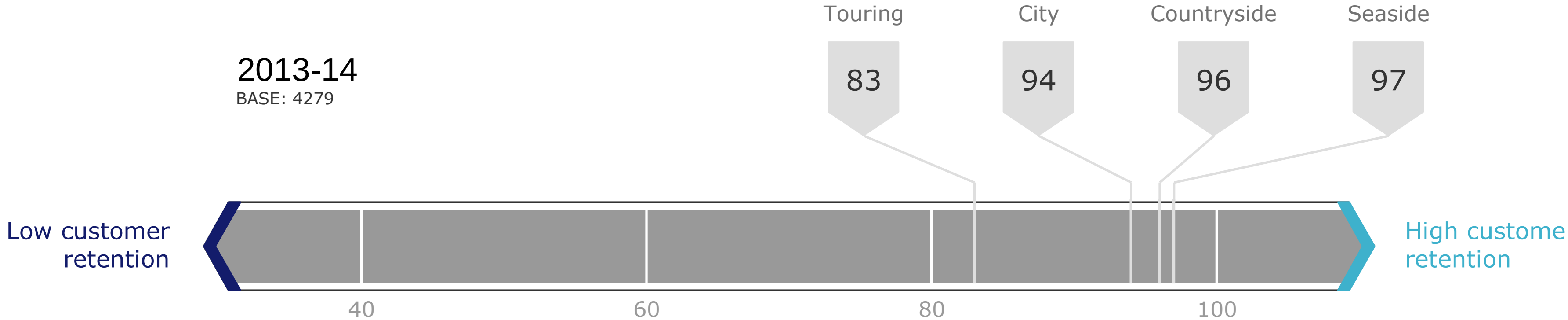
Countryside



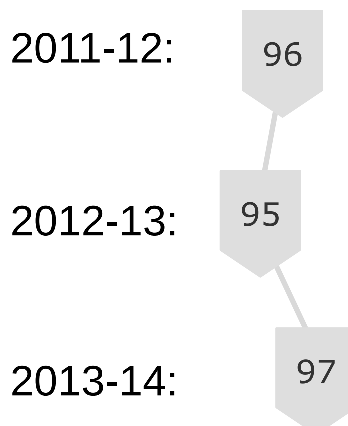
Not too much variation in countryside destination satisfaction – no clear trends

Visitor Experience TRI*M Index
Location of Holiday

2013-14
BASE: 4279



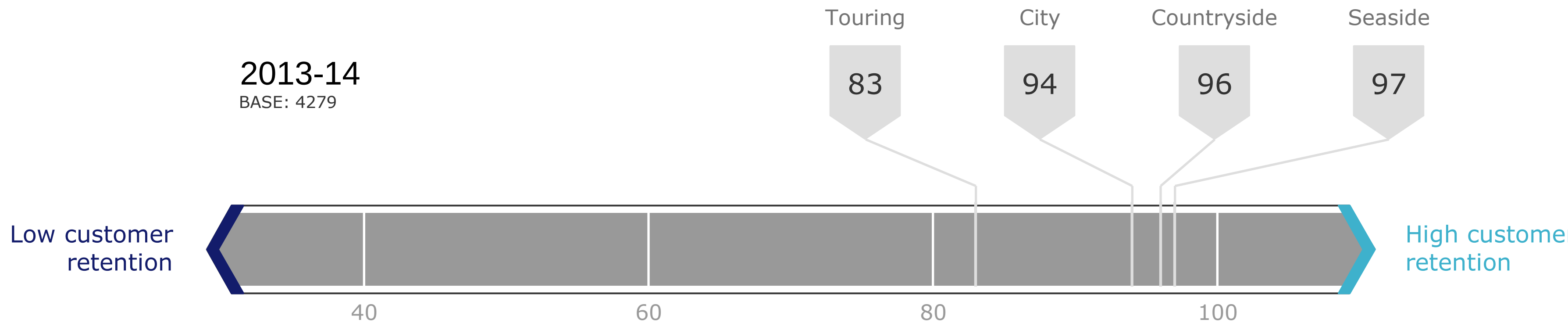
Seaside



Again, little variation in seaside destination satisfaction – though latest year is best performing

Visitor Experience TRI*M Index
Location of Holiday

2013-14
BASE: 4279



Touring

2011-12: 87

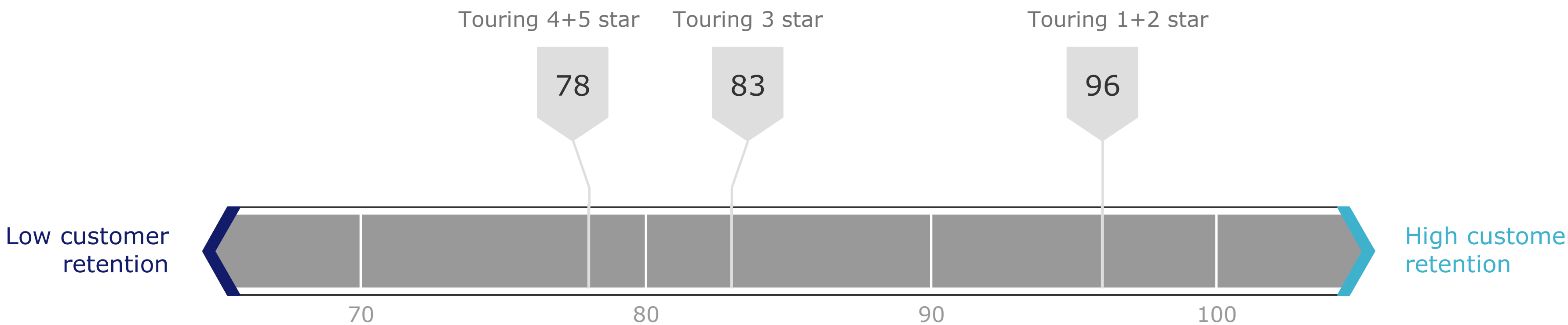
2012-13: 88

2013-14: 83

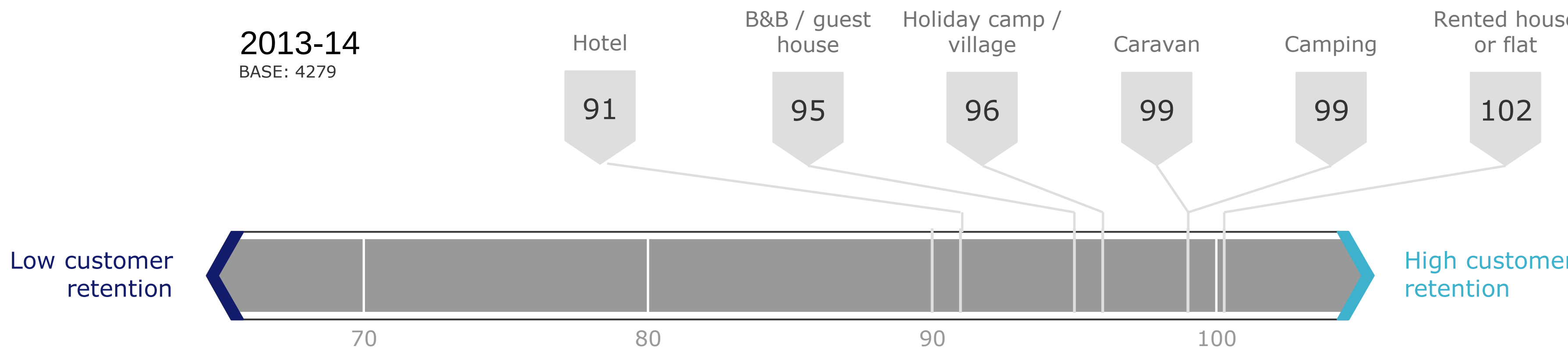
A decline in destination satisfaction with touring holidays compared with previous years

Visitor Experience TRI*M Index
Touring- by star rating

SEGMENT: Touring - WAVE: July 2013 - June 2014
Base 4279



Visitor Experience TRI*M Index
Accommodation types

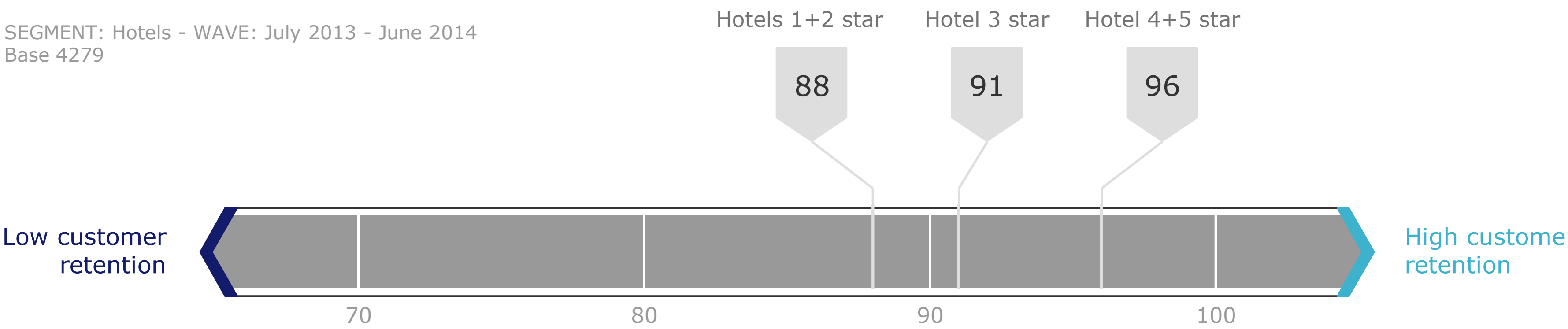


Hotel

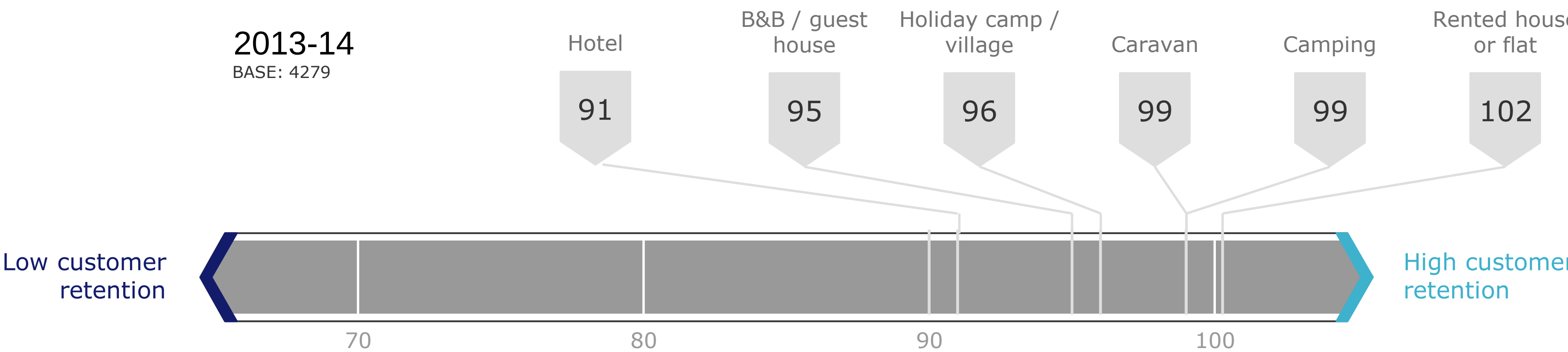
Consistently below average performance from hotels as a whole

Visitor Experience TRI*M Index
Hotels- by star rating

SEGMENT: Hotels - WAVE: July 2013 - June 2014
Base 4279



Visitor Experience TRI*M Index
Accommodation types



B&B / Guesthouse

2011-12: 94

2012-13: 98

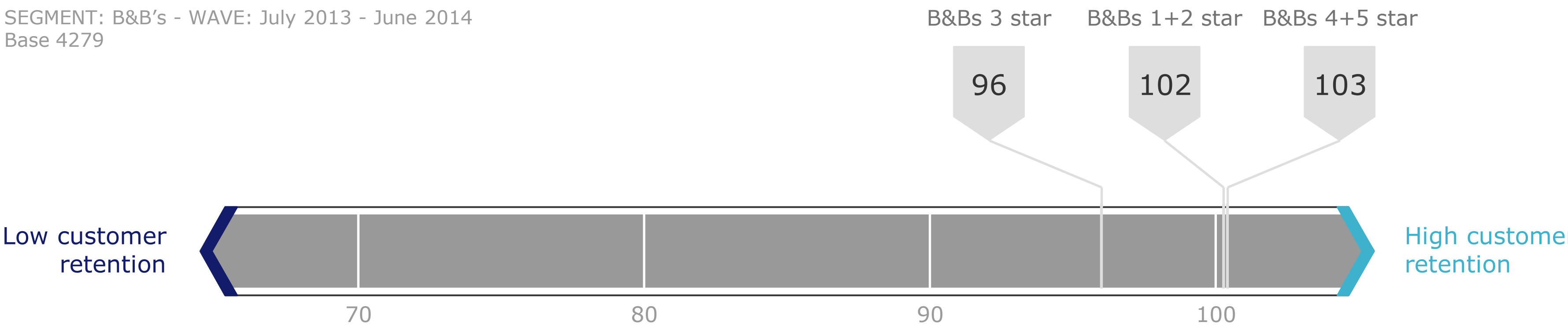
2013-14: 95

B&B satisfaction has varied year on year and is now around the average for all trips

Visitor Experience TRI*M Index
B&B- by star rating

TNS

SEGMENT: B&B's - WAVE: July 2013 - June 2014
Base 4279



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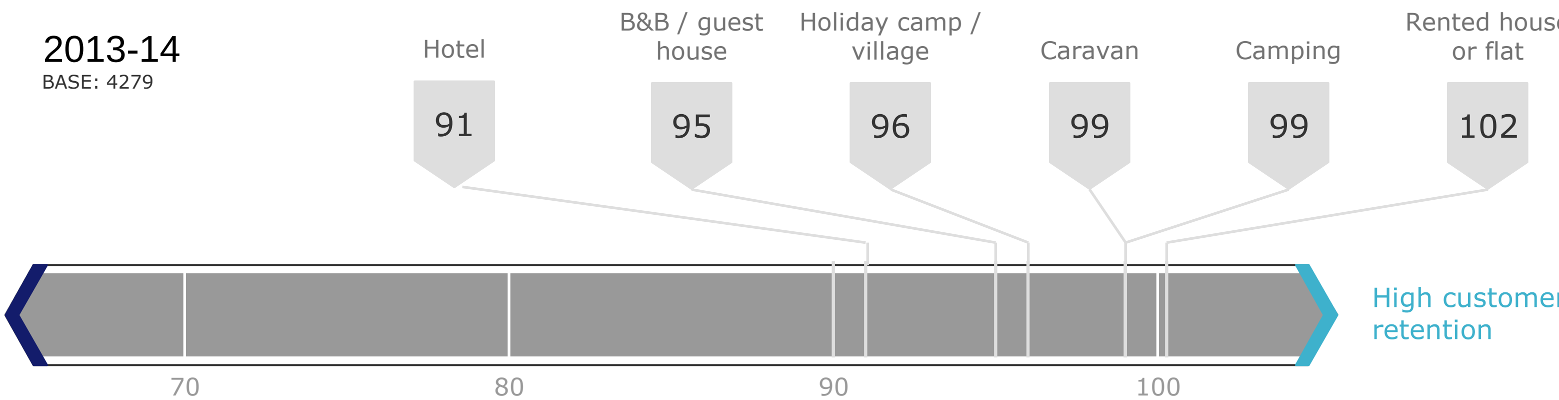
Visitor Experience TRI*M Index
Accommodation types



Holiday camp / village

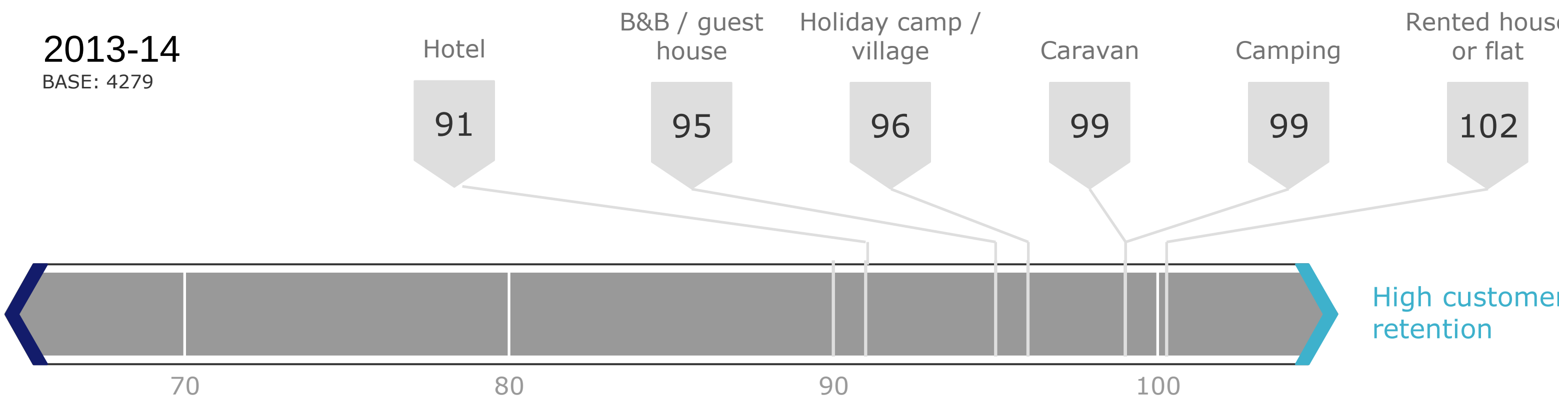
2011-12: 92

2012-13: 94

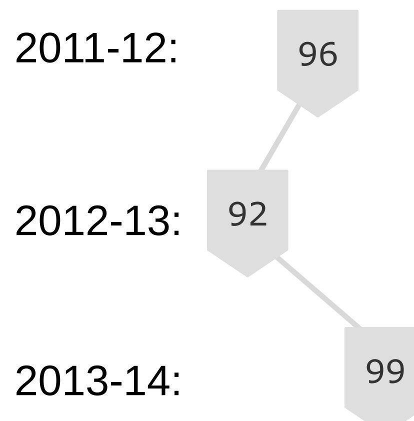
2013-14: 96

Year on year increases in satisfaction at holiday camps and villages

Visitor Experience TRI*M Index
Accommodation types



Caravan



Varied year-on-year levels of satisfaction on caravan holidays

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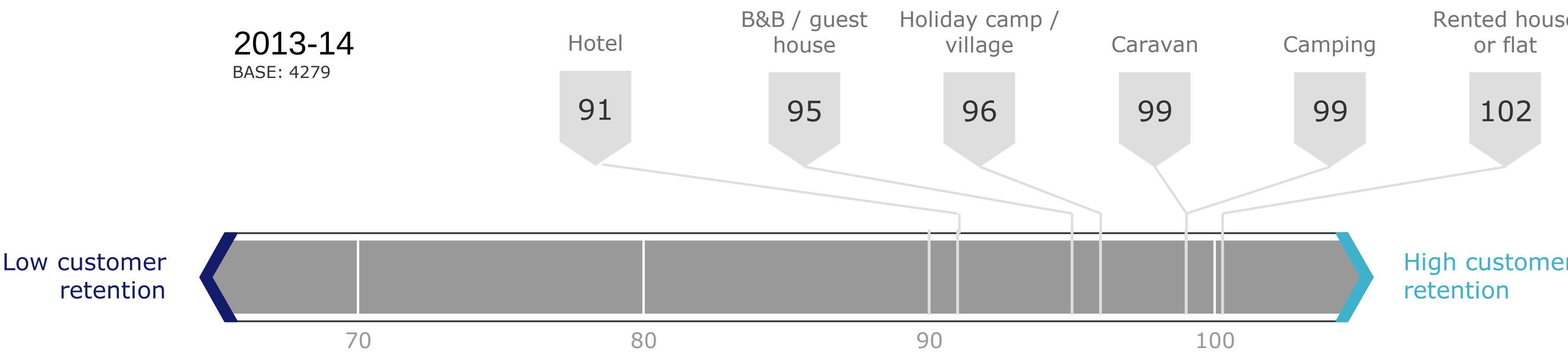
Visitor Experience TRI*M Index
Accommodation types



Camping

2011-12: 92

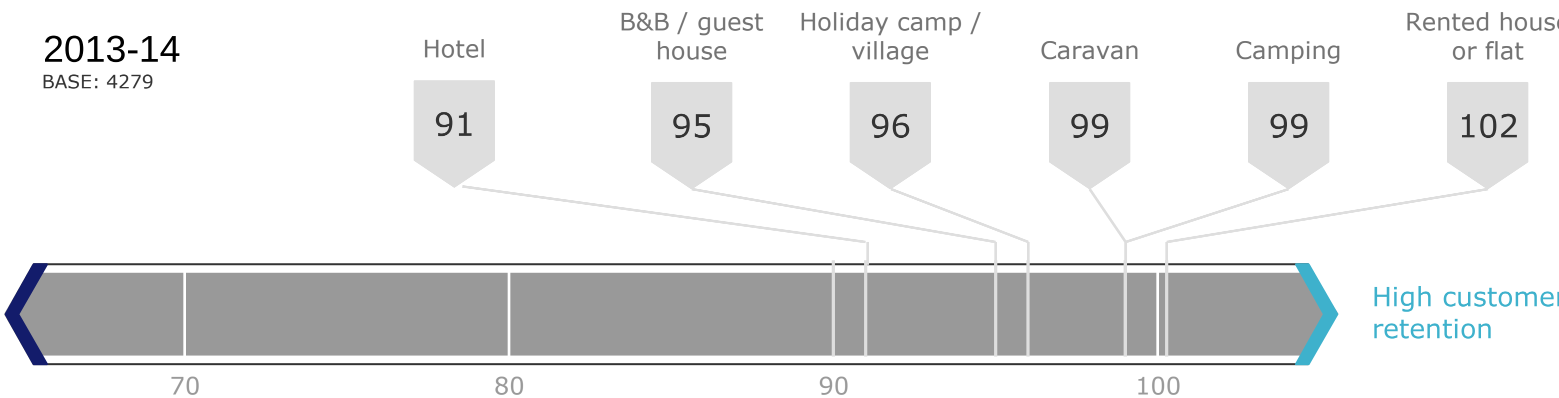
2012-13: 96

2013-14: 99

Steady increase in satisfaction on camping holidays – from below national average satisfaction to significantly above

Visitor Experience TRI*M Index
Accommodation types

2013-14
BASE: 4279



Rented house / flat

2011-12: 101

2012-13: 101

2013-14: 102

Satisfaction with self-catering accommodation has consistently been the highest of all accommodation types

The slight upward shift in satisfaction overall is reflected in increases among pre-nesters and families especially on mid-length holidays for camping or in holiday villages. City breaks also showing increased satisfaction levels. Only on Touring and longer holidays are levels of satisfaction declining

Self catering	102
Longer holidays	101
Mid length holidays	100
Caravans	99
Camping	99
Families	98
Seaside	97
Countryside	96
Holiday camps	96
B&Bs/Guest houses	95
Cities	94
Independents	93
Empty Nesters	93
Short breaks	92
Pre Nesters	91
Hotels	91
Touring	83

The Drivers of Satisfaction

Determining the drivers of satisfaction (1)

30-35 attributes of the 'destination experience' are asked about:

Rated in terms of importance to the respondent (Stated Importance)

'How important is each of these factors to you when thinking about short breaks or holidays?'

Extremely Important (Score of 5)
Very Important (4)
Fairly Important (3)
Not Very Important (2)
Not at All Important (1)

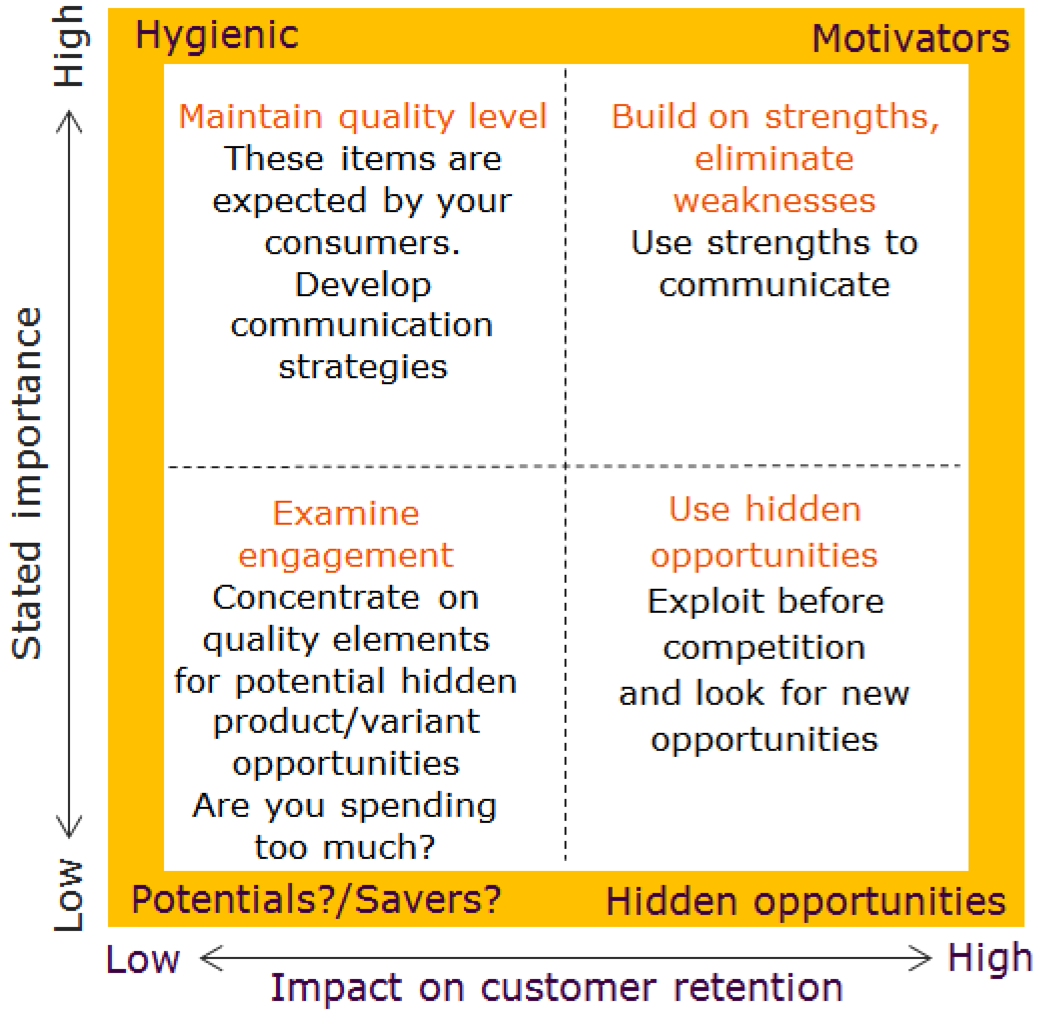
Rated in terms of how the destination performed during the visit

'How would you rate 'DESTINATION' on each of the following factors?'

Excellent (Score of 5)
Very Good (4)
Good (3)
Fair (2)
Poor (1)

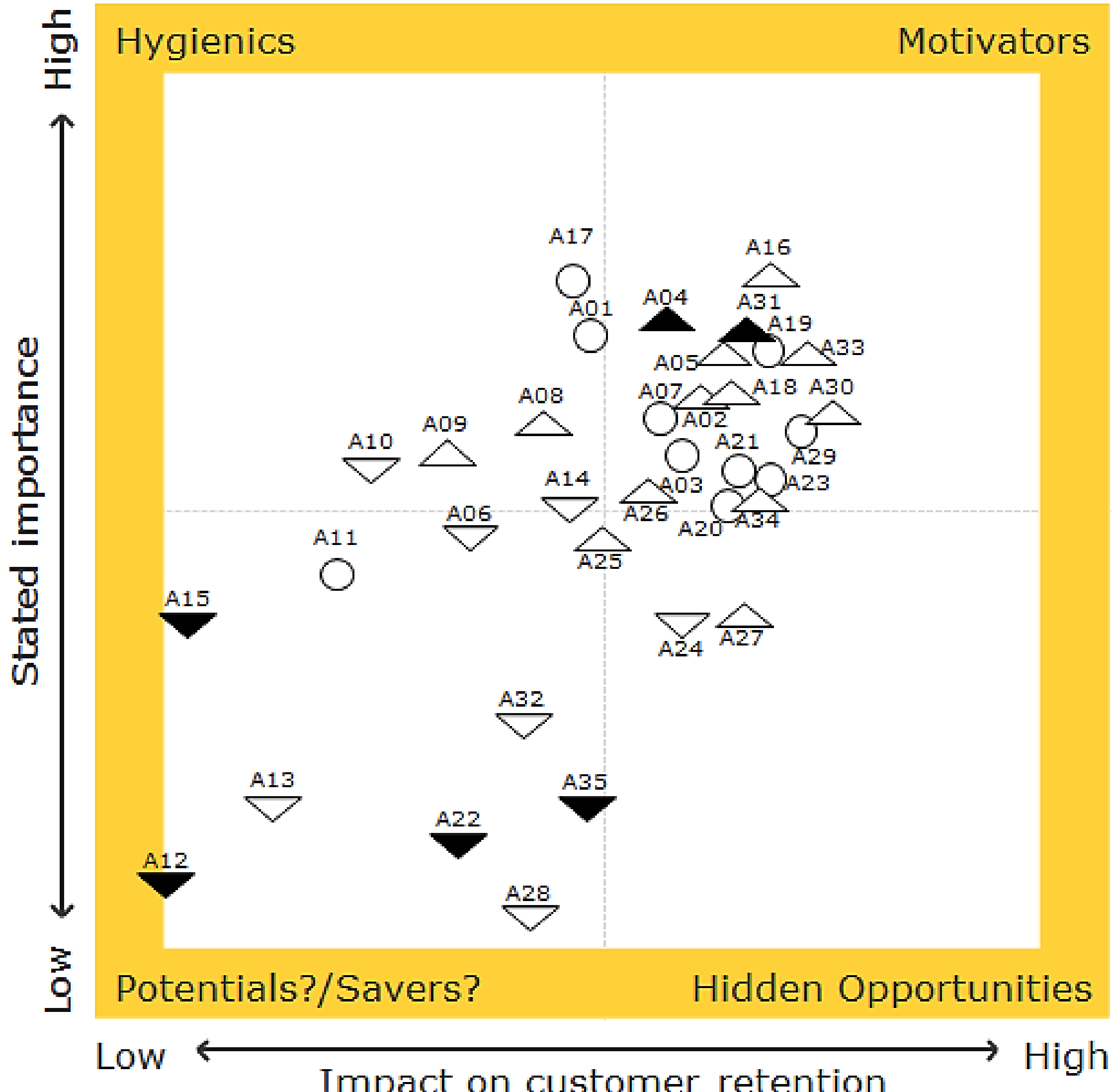
And a third dimension is derived – Impact on the Experience
(to what extent does overall satisfaction correlate to each attribute)

Determining the drivers of satisfaction (2)



Destination England: The TRI*M Grid

A01. Good value for money generally
A02. Welcoming and friendly people
A03. Very high levels of customer service
A04. A place where I feel safe and secure
A05. Clean and tidy environment
A06. Deals and discounts for the destination
A07. Accessible for those with impairments*
A08. Easy to find useful info when planning
A09. Easy to book your trip in advance
A10. Not too expensive to get to
A11. Doesn't take too long to get to
A12. Easy to get to by public transport
A13. Easy to get around by public transport
A14. Clear signposting to find your way around
A15. Availability of reasonably priced car parking
A16. Good quality accommodation
A17. Accommodation that offers value for money
A18. Variety of accom that suits my needs
A19. Good quality food, drink and dining
A20. Opportunities to eat/drink local food etc.
A21. Easy to find useful info when you're there
A22. Availability of festivals, music, sporting events
A23. Wide range of attractions and things to do
A24. Availability of individual/independent local shops
A25. Opportunities to visit museums/galleries
A26. Opportunities to see famous buildings
A27. Good range of shopping opportunities
A28. Good nightlife
A29. Attractive/well maintained town/city centre
A30. Interesting towns and villages to visit
A31. Unspoilt countryside
A32. Good range of outdoor activities
A33. Clean and well-maintained beaches
A34. Beaches which are safe and suitable for bathing
A35. Good range of water-based/beach activities



* Only asked of individuals who have / travelled with someone with an impairment

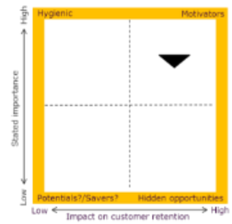
94
TRI*M Index

Performance - Far below average | Below average | Average | Above average | Far above average

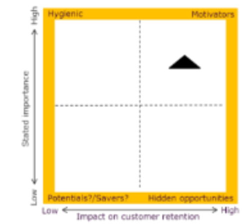
SOURCE:
Base: 4,279

But we can make analysis much more straightforward using summaries with strengths & weaknesses prioritised based on their grid position......

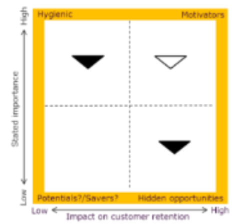
High level weakness



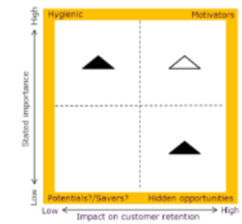
High level strength



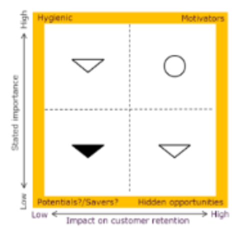
Medium level weakness



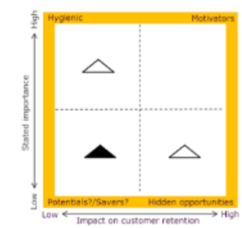
Medium level strength



Low level weakness



Low level strength



▼ Far below average ▽ Below average ○ Average △ Above average ▲ Far above average ■ Positive ■ Negative

DESTINATION ENGLAND:
STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained

High level strengths

A31. Unspoilt countryside
A04. A place where I feel safe and secure

Medium level strengths

A30. Interesting towns and villages to visit
A16. Good quality accommodation
A33. Clean and well-maintained beaches
A05. Clean and tidy environment
A18. Variety of accommodation to choose from that suits my needs
A02. Welcoming and friendly people
A34. Beaches which are safe and suitable for bathing
A26. Opportunities to see famous buildings and monuments

Low level strengths

A27. Good range of shopping opportunities
A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance

DESTINATION ENGLAND: WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase

High level weaknesses

None

Medium level weaknesses

None

Low level weaknesses

A19. Good quality food, drink and dining
A29. Attractive/well maintained town/city centre
A23. Wide range of attractions and things to do
A21. Easy to find useful information about the destination when you're there
A20. Opportunities to eat/drink local food and produce
A03. Very high levels of customer service
A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments) *
A24. Availability of individual/independent local shops
A14. Clear signposting that helps you find your way around the destination
A35. Good range of water-based/beach activities
A10. A destination that is not too expensive to get to
A22. Availability of festivals, music, sporting and cultural events
A15. Availability of reasonably priced car parking
A12. A destination that is easy to get to by public transport

* Only asked of individuals who have / travelled with someone with an impairment

Best performing attributes, 2013-14

Those described by more than a quarter as 'excellent'

Encouragingly, the vast majority are key motivators

Unspoilt countryside - COUNTRYSIDE	43%
A place where I feel safe and secure	31%
Quality of accommodation	30%
Interesting towns and villages to visit - COUNTRYSIDE	30%
Welcoming and friendly people	29%
Opportunities to see famous buildings and monuments - CITIES	29%
Clean and tidy environment	27%
Ease of booking your trip/different parts of your trip in advance	27%
Opportunities to visit museums/galleries/contemporary arts - CITIES	27%
Clean and well-maintained beaches - SEASIDE	27%
Beaches which are safe and suitable for bathing - SEASIDE	27%
Ease of finding information about the destination when planning	26%
Value for money of accommodation	26%
Quality of food, drink and dining	26%
Good range of shopping opportunities - CITIES	26%

Poorest performing attributes, 2013-14
Those described by less than a quarter as ‘excellent’

TNS

Value for money, accessing local information, deals and signposting need attention as all are important but performing below average

Availability of festivals, music, sporting and cultural events	15%
The nightlife - CITIES	16%
Availability of reasonably priced car parking	17%
The range of water-based/beach activities - SEASIDE	17%
Ease of getting around by public transport	18%
Overall availability of deals and discounts for the destination	19%
A destination that is easy to get to by public transport	19%
Availability of individual/independent local shops	20%
Range of outdoor activities - COUNTRYSIDE	20%
Clarity of signposting that helps you find your way around the destination	21%
Opportunities to eat/drink local food and produce	22%
Ease of finding useful information about the destination when you're there	22%
Value for money generally	23%
A destination that is not too expensive to get to	23%

H M S O

VisitEngland™

Increases in overall satisfaction driven by increases in ‘excellent’ rating of motivating attributes
(Annual average change, 2011-2014)

Motivators

Ease of finding useful information about the destination when you're there	+8%
Well maintained town/city centre	+7%
Levels of customer service	+7%
Availability of a wide range of attractions and things to do	+5%
Variety of accommodation to choose from that suits my needs	+4%
Opportunities to see famous buildings and monuments	+4%
Welcoming and friendly people	+4%
Quality of accommodation	+4%
A place where I feel safe and secure	+3%
Unspoilt countryside	+3%
Clean and well-maintained beaches	+2%
Quality of food, drink and dining	+2%
Clean and tidy environment	+2%
Interesting towns and villages to visit	-

H M S O

Increases in overall satisfaction driven by increases in 'excellent' rating of motivating attributes
(Annual average change, 2011-2014)

Hygienics

Clarity of signposting that helps you find your way around the destination	+12%
Ease of finding useful information about the destination when planning the trip	+9%
A destination that is not too expensive to get to	+7%
Ease of booking your trip/different parts of your trip in advance	+6%
Value for money generally	+5%
Overall availability of deals and discounts for the destination	+3%
Value for money of accommodation	-

H M S O

Increases in overall satisfaction driven by increases in 'excellent' rating of motivating attributes
(Annual average change, 2011-2014)

- Availability of individual/independent local shops +6%
- Good range of shopping opportunities +5%
- Opportunities to visit museums/galleries and contemporary arts +5%
- Beaches which are safe and suitable for bathing +4%
- Opportunities to eat/drink local food and produce +3%

Hidden Opportunities

H M S O

The building blocks – destination performance

Measures of satisfaction based on main destination on most recent holiday/break in England (July 2012-June 2014)

South West England:
1,858 respondents (26%)

- Torquay 192
- Other Devon 272
- Total Devon 464
- Cornwall 473
- Bournemouth 170
- Weymouth 67
- Other Dorset 89
- Total Dorset 326
- Bristol 87
- Bath 117
- Somerset 149
- Wiltshire 54
- Gloucestershire 42
- The Cotswolds 90

London & the South East:
1,052 respondents (15%)

- London 748
- Eastbourne 37
- Other E Sussex 38
- Total E Sussex 75
- Canterbury 22
- Kent coast 94
- Other Kent 59
- Total Kent 175
- Other South East 54

South of England:
677 respondents (9%)

- Brighton 159
- Other W Sussex 56
- Total W Sussex 215
- Buckinghamshire 23
- Isle of Wight 110
- The New Forest 72
- Portsmouth 42
- Other Hampshire 67
- Oxford 53
- Other Oxfordshire 23
- Total Oxfordshire 76
- Other S England 63

West Midlands:
414 respondents (6%)

- Stratford 65
- Warwickshire 53
- Staffordshire 54
- Birmingham 145
- Shropshire 41
- Other W Midlands 12

East Midlands:
425 respondents (6%)

- Nottingham 51
- Total Notts 82
- Derbyshire 46
- Lincoln 36
- Leicestershire 34
- Peak District 94
- Skegness 100

East England:
666 respondents (9%)

- Great Yarmouth 157
- Other Norfolk 221
- Total Norfolk 378
- Suffolk 99
- Cambridge 51
- Total Camb'shire 71
- Essex 67
- Other East Anglia 51

North West England:
1,095 respondents (15%)

- The Lake District 336
- Other Cumbria 32
- Total Cumbria 368
- Blackpool 223
- Lancashire Coast 42
- Other Lancashire 33
- Total Lancashire 298
- Liverpool 126
- Total Merseyside 143
- Manchester 162
- Chester 66
- Other Cheshire 27
- Total Cheshire 93
- Other North West 31

Yorkshire:
681 respondents (10%)

- York 167
- Leeds 65
- Scarborough 115
- North York Moors 50
- Yorkshire Coast 51
- Yorkshire Dales 84
- Other Yorkshire 73
- Total Yorkshire 650
- Total Humberside 31

North East England:
278 respondents (4%)

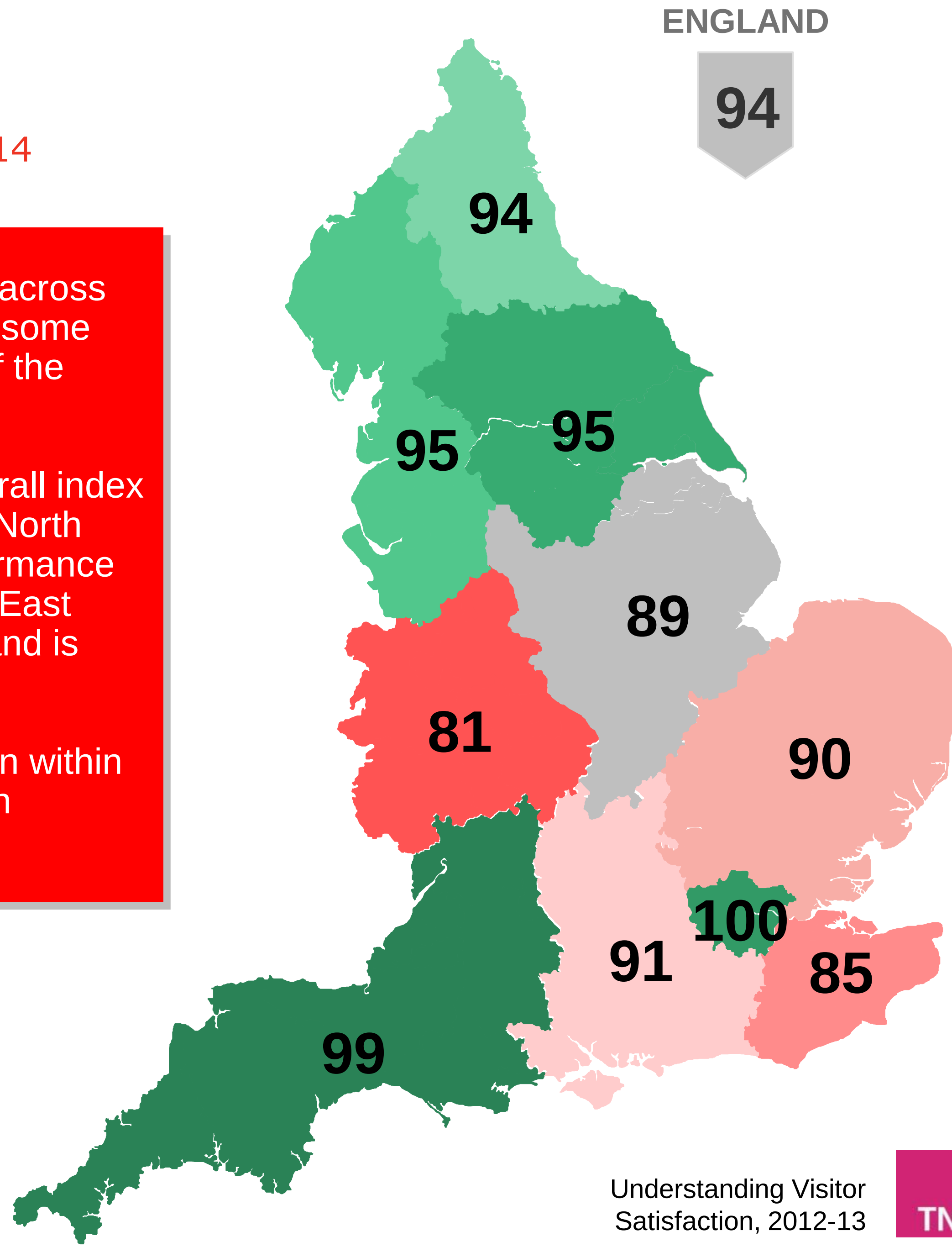
- Northumberland 114
- Durham 46
- Newcastle 67

Variations in satisfaction by destination region
(2 year period – July 2012-June 2014

The overall satisfaction index for England across the two year period is 94 – but this masks some fairly large variations across the regions of the country.

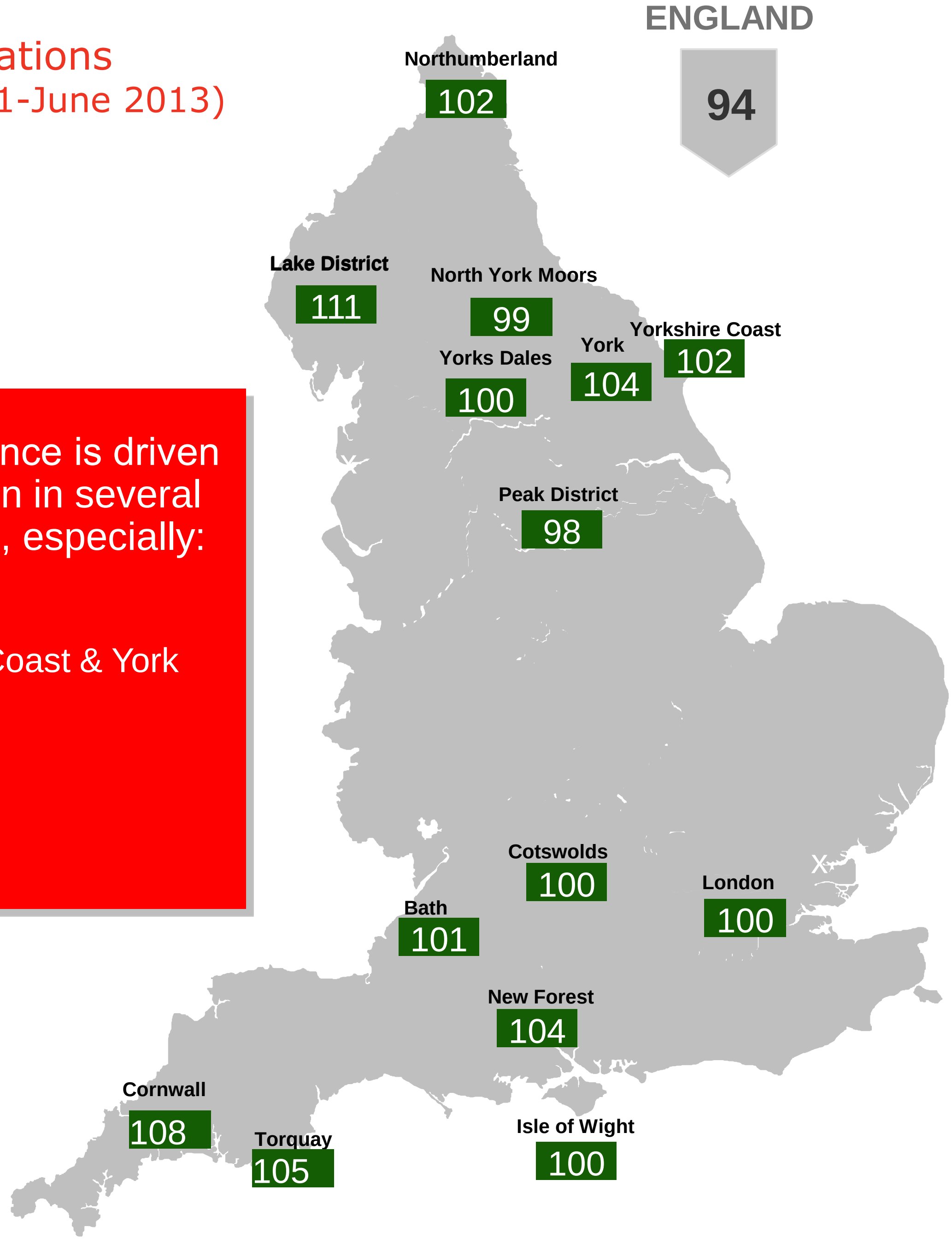
Five areas are helping to drive up this overall index – London, the South West, Yorkshire, the North West and the North East. However, performance in the West Midlands, the South East, the East Midlands, the South and the East of England is working against this.

The next slide illustrates however that even within these regions, there are major variations in satisfaction at the destination level……..



VisitEngland

Top performing destinations
(2 year period – July 2011-June 2013)



England's overall performance is driven by high levels of satisfaction in several key destinations and areas, especially:

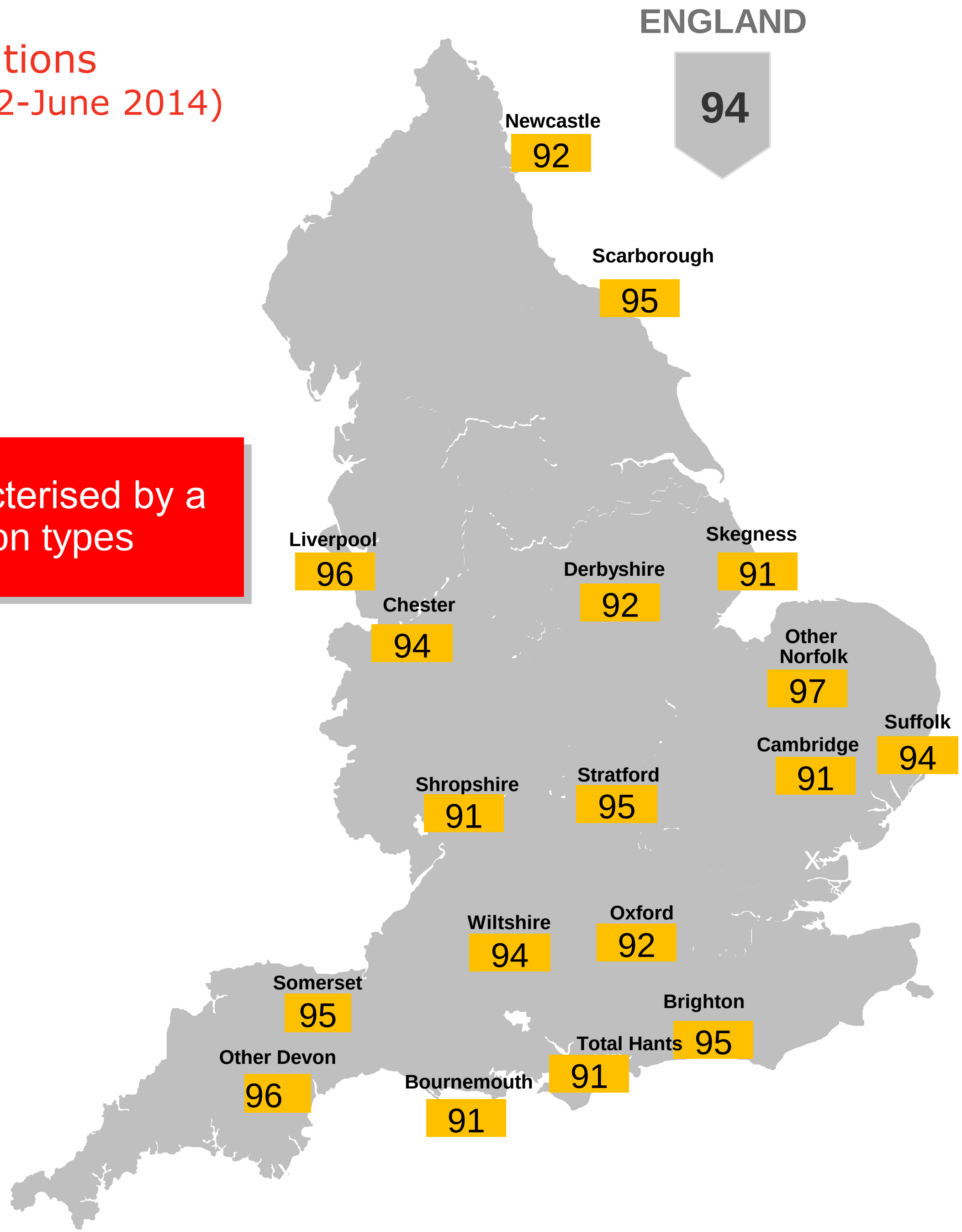
- Lake District
- Yorkshire – Moors, Dales, Coast & York
- Cornwall
- Torquay
- New Forest
- Northumberland
- Bath

VisitEngland

Source: England Brand Tracker & Visitor Satisfaction Study – fieldwork, July 2012-June 2014; Base: 7192

Middle ranking destinations
(2 year period – July 2012-June 2014)

The ‘middle ground’ characterised by a range of different destination types



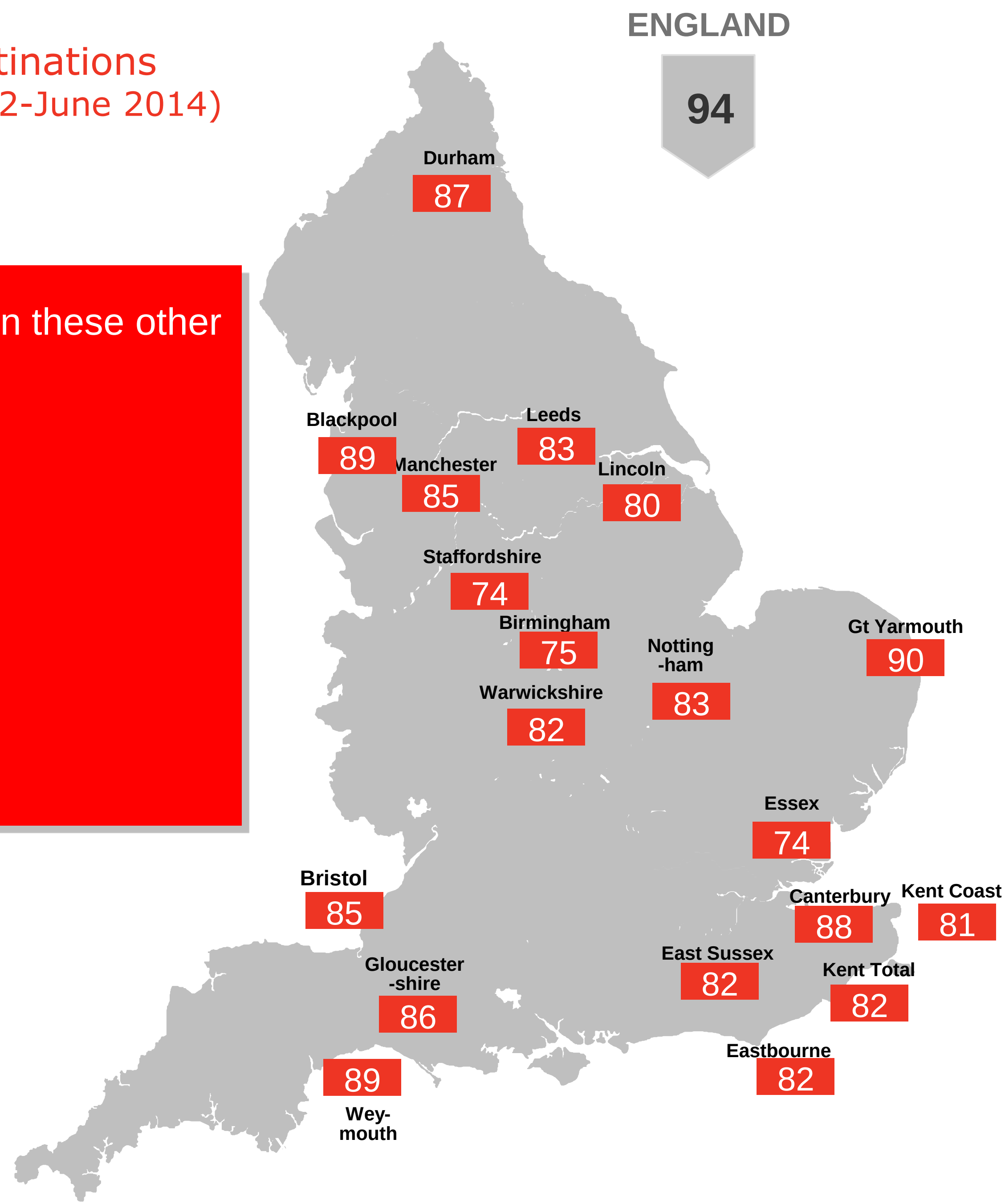
VisitEngland

Source: England Brand Tracker & Visitor Satisfaction Study – fieldwork, July 2012-June 2014; Base: 7192

Lower performing destinations
(2 year period – July 2012-June 2014)

Overall satisfaction levels in these other destinations are lower:

- Essex
- Staffordshire
- Birmingham
- Lincoln
- Kent coast
- Eastbourne
- Nottingham
- Leeds
- Manchester
- Bristol



VisitEngland

Source: England Brand Tracker & Visitor Satisfaction Study – fieldwork, July 2012-June 2014; Base: 7192

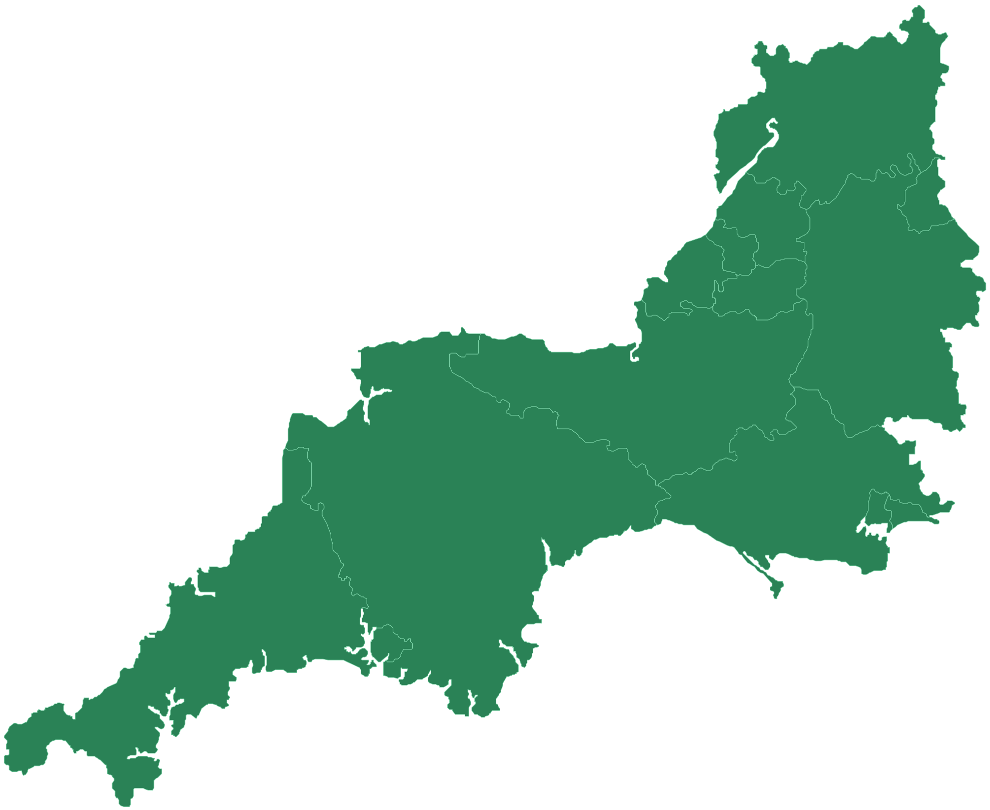
The South West:
Strong performance driven by Cornwall, Torquay, Bath and the Cotswolds

(2 year period – July 2012-June 2014)

SOUTH WEST

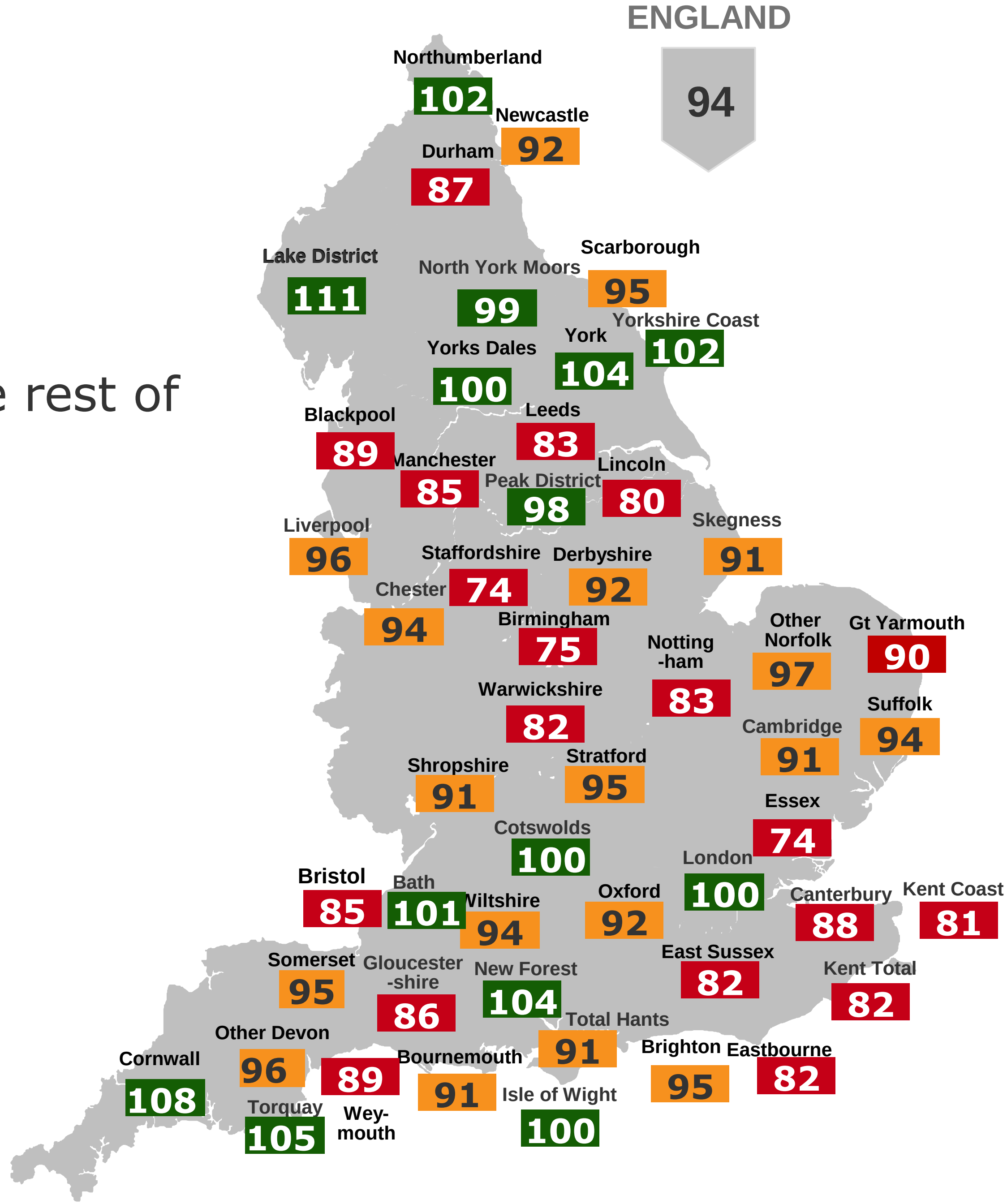
99

Torquay	105
Other Devon	96
Total Devon	100
Cornwall	108
Bournemouth	91
Weymouth	89
Other Dorset	93
Total Dorset	91
Bristol	85
Bath	101
Somerset	95
Wiltshire	94
Gloucestershire	86
The Cotswolds	100



Attract Brands

In comparison to the rest of England…



Source: England Brand Tracker & Visitor Satisfaction Study – fieldwork, July 2012-June 2014; Base: 7192

The South of England:
Strong performances from the New Forest, Isle of Wight and Brighton. Poorer performance elsewhere

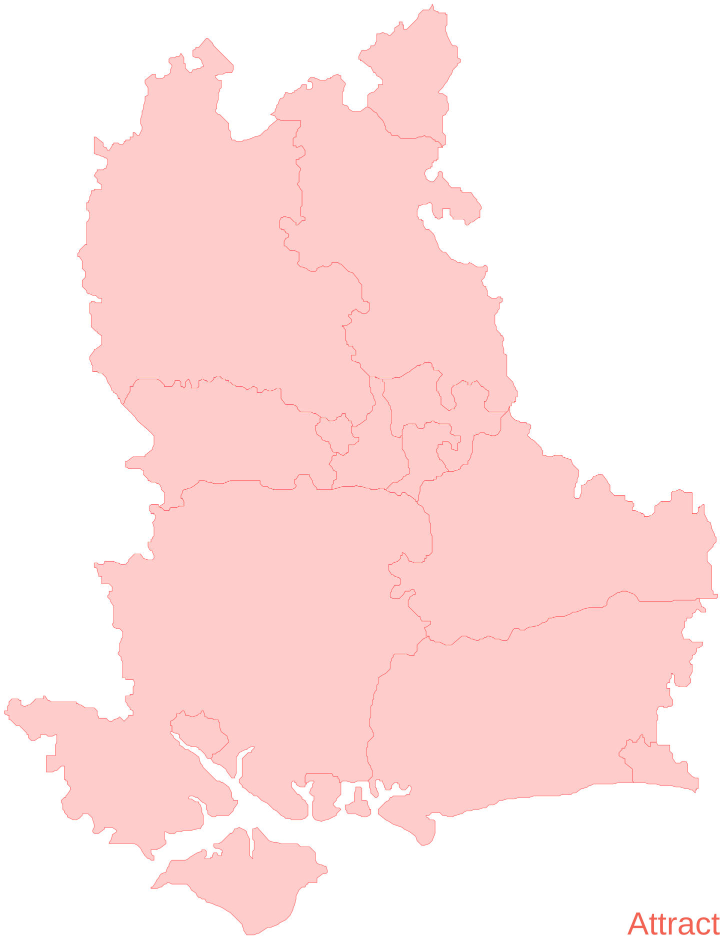
SOUTH

91

(2 year period – July 2012-June 2014)

Brighton	95
Other West Sussex	84
Total West Sussex	92
Isle of Wight	100
The New Forest	104
Portsmouth (*)	86
Other Hampshire	80
Oxford	92
Other Oxfordshire	71
Total Oxfordshire	86
Other Southern England	72

(* - Less than 50 respondents)



Attract Brands

SOUTH EAST

85

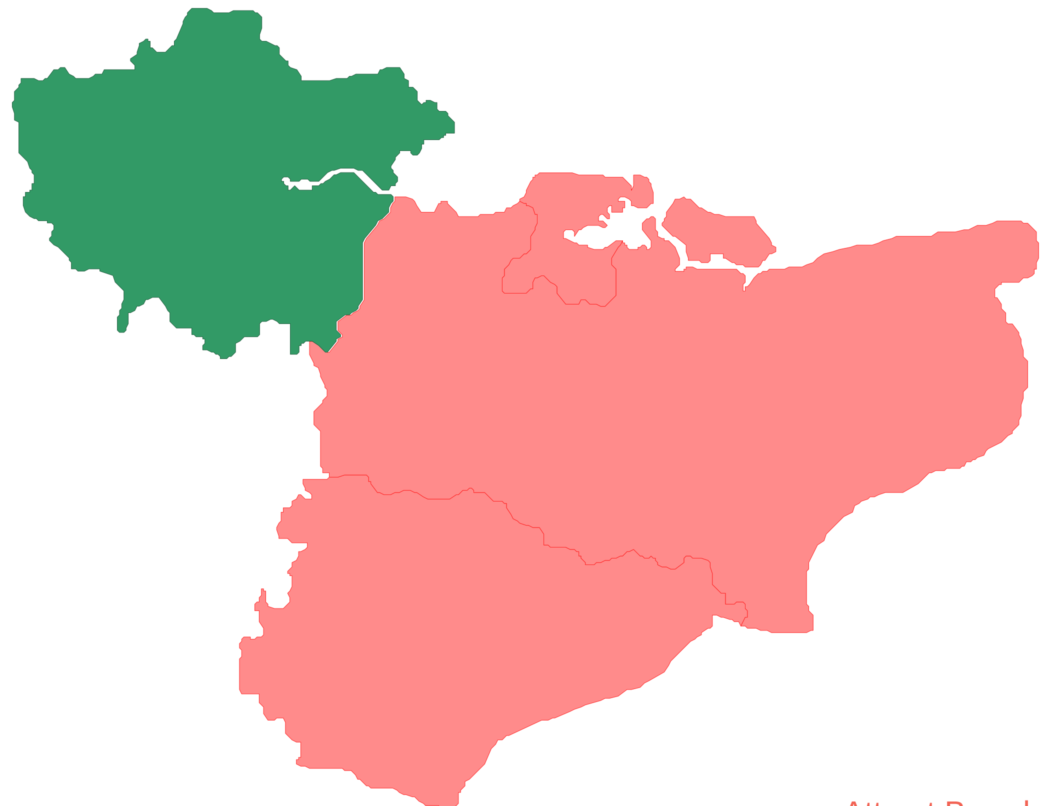
South East England & London:

The South East is one of the poorer performing regions – with relatively low satisfaction in Eastbourne & East Sussex and the Kent coast. London is a very strong performer however

(2 year period – July 2012-June 2014)

London	100
Eastbourne (*)	82
Other East Sussex (*)	81
Total East Sussex	82
Canterbury (*)	88
Kent coast (inc Margate, Ramsgate, Dover)	81
Total Kent	82
Other South East England (*)	72

(* - Less than 50 respondents)



Attract Brands

The East of England:

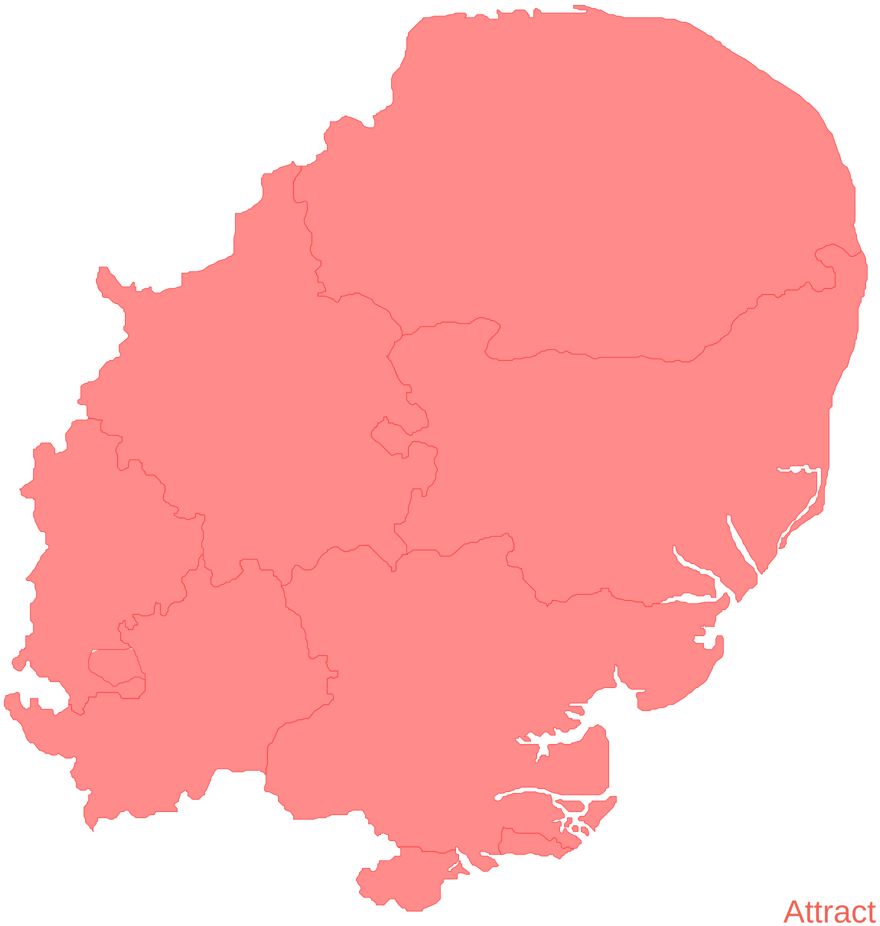
Norfolk and Suffolk are the best performing areas of the region, around national average. Overall performance reduced considerably by Essex

(2 year period – July 2012-June 2014)

EAST

90

Great Yarmouth	90
Other Norfolk	97
Total Norfolk	94
Suffolk	94
Cambridge	91
Total Cambridgeshire	85
Essex	74
Other East of England/East Anglia	88



Attract Brands

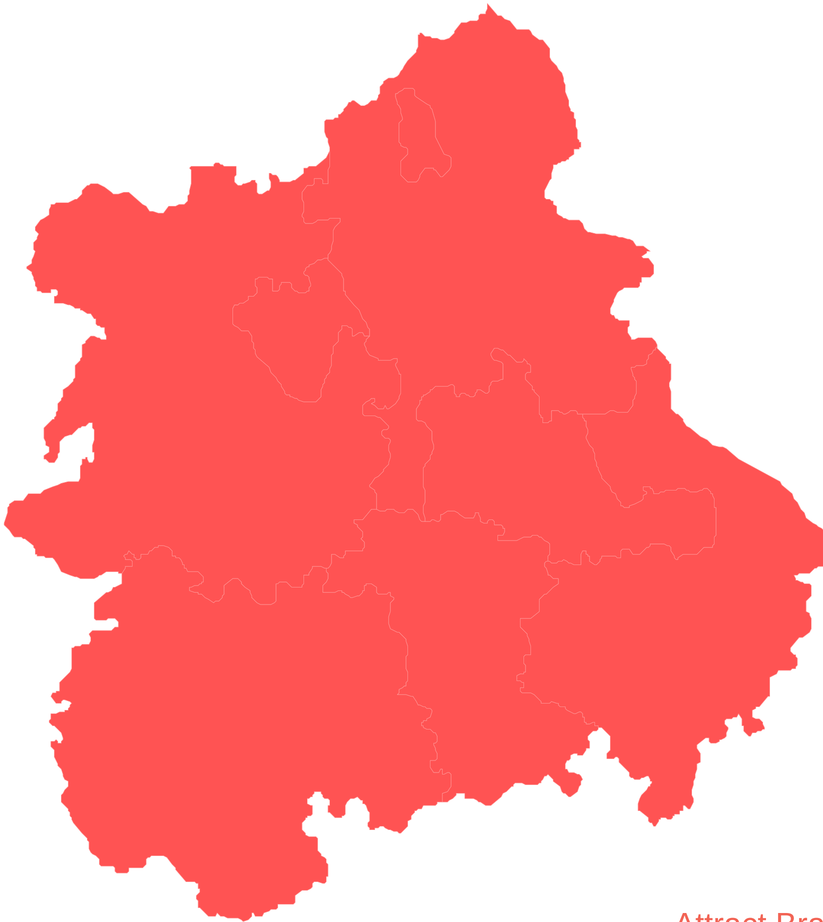
West Midlands:
Stratford and Shropshire perform best – all other parts of the region have much lower levels of satisfaction

(2 year period – July 2012-June 2014)

WEST MIDLANDS
81

Stratford upon Avon	95
Warwickshire	82
Staffordshire	74
Birmingham	75
Shropshire (*)	91

(* - Less than 50 respondents)



Attract Brands

EAST MIDLANDS

89

East Midlands:

Performs below the overall England standard –driven up by satisfaction with visits to the Peak District but down by other parts of the region

(2 year period – July 2012-June 2014)

Nottingham	83
Total Nottinghamshire	88
Derbyshire (*)	92
Leicestershire (*)	83
Peak District	98
Lincoln (*)	80
Skegness	91

(* - Less than 50 respondents)

Attract Brands

North West:

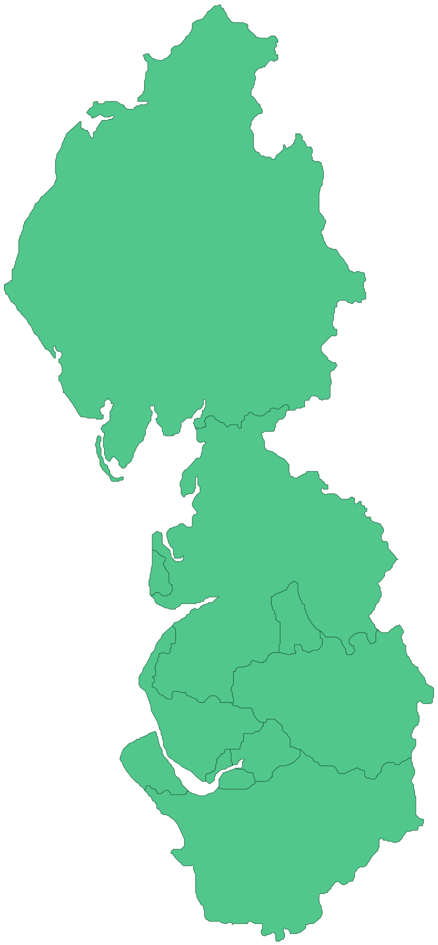
Strength of this region driven by the Lake District. Liverpool & Chester also driving up index – but weakened by Blackpool & Manchester

(2 year period – July 2012-June 2014)

NORTH WEST

95

The Lake District	111
Other Cumbria (*)	91
Total Cumbria	109
Blackpool	89
The Lancashire Coast (*) (Morecambe, Lytham St Annes)	84
Total Lancashire	87
Liverpool	96
Total Merseyside	93
Manchester	85
Chester	94
Other Cheshire (*)	90
Total Cheshire	93



Attract Brands

(* - Less than 50 respondents)

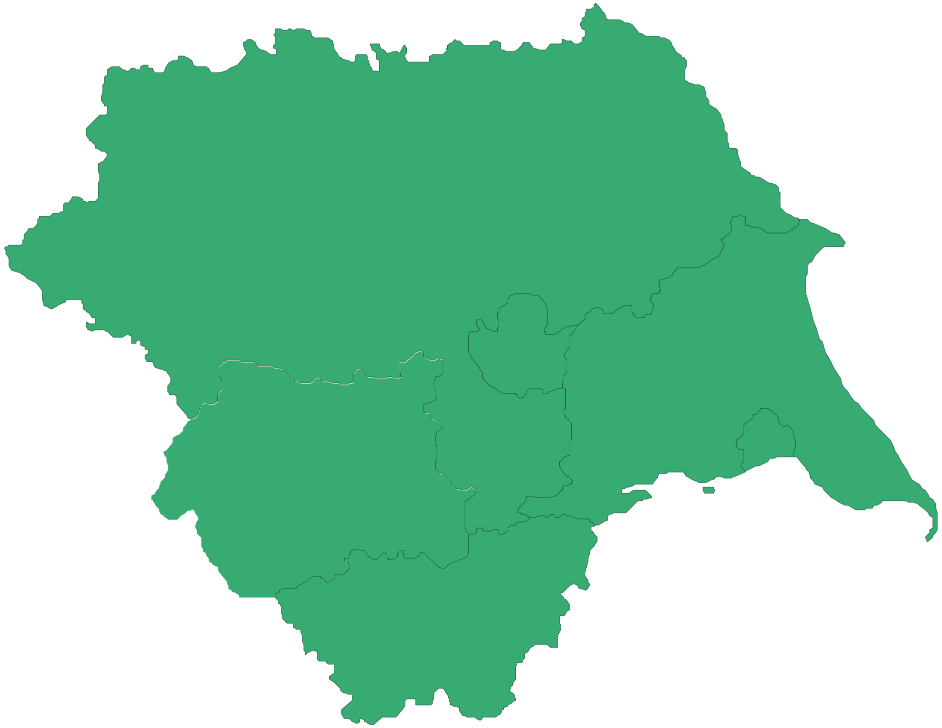
Yorkshire & the Humber:

Yorkshire characterised by several strongly performing sub-brands. Overall performance reduced by Leeds and other parts of South Yorkshire and Humberside

YORKS/HUMB
95

(2 year period – July 2012-June 2014)

York	104
Leeds	83
Scarborough	95
North York Moors	99
Yorkshire Coast	102
Yorkshire Dales	100
Other Yorkshire	88



Attract Brands

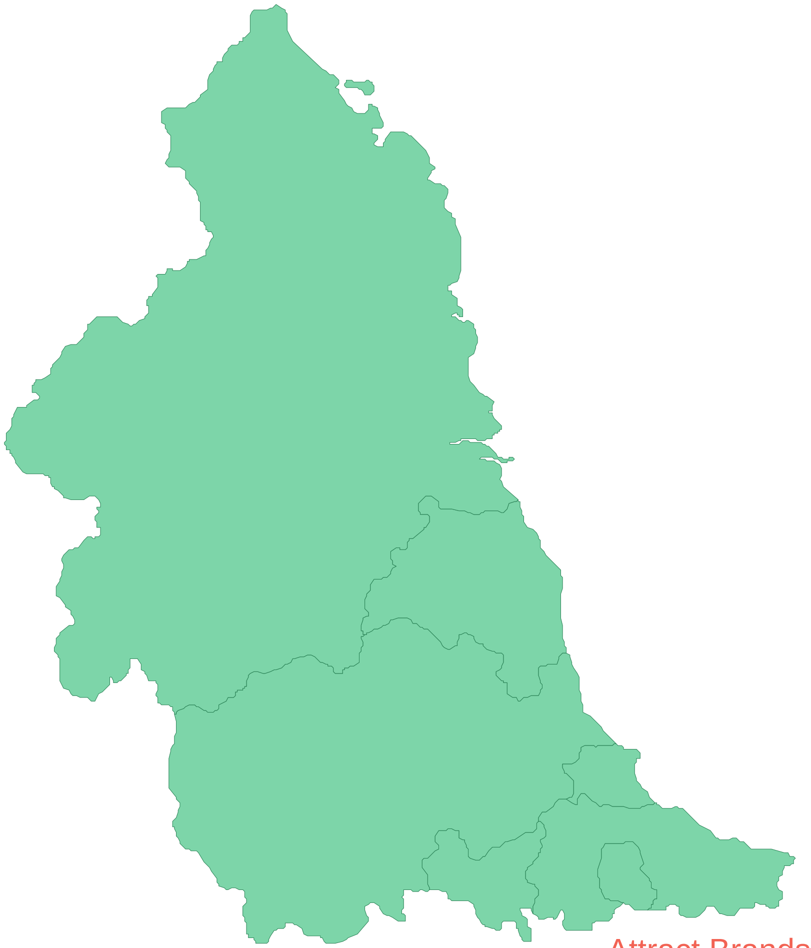
NORTH EAST

94

North East:
Northumberland is significantly driving up satisfaction within this region – otherwise below average

(2 year period – July 2012-June 2014)

Northumberland	102
Durham (*)	87
Newcastle upon Tyne	92



Attract Brands

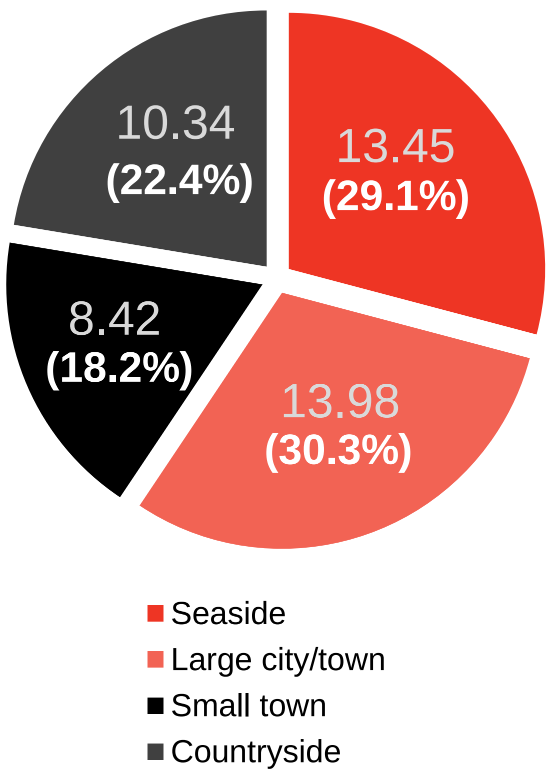
(* - Less than 50 respondents)

Destination type analysis:

Seaside
Countryside
Cities

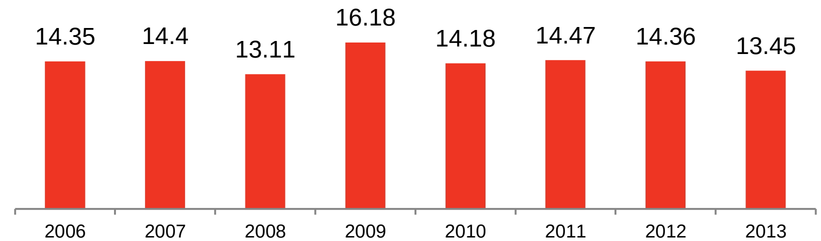
Trip Destination Types:
Volume and Value context from GBTS

Holiday trips by GB residents in England, 2013 (millions)

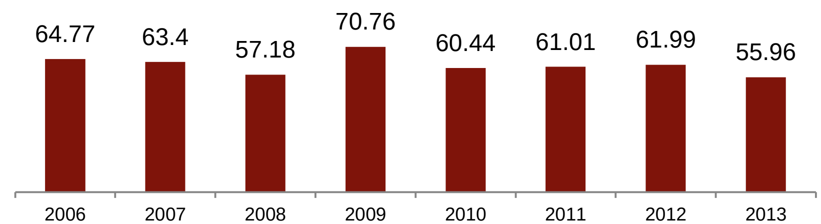


Trends in GB seaside holidays in England

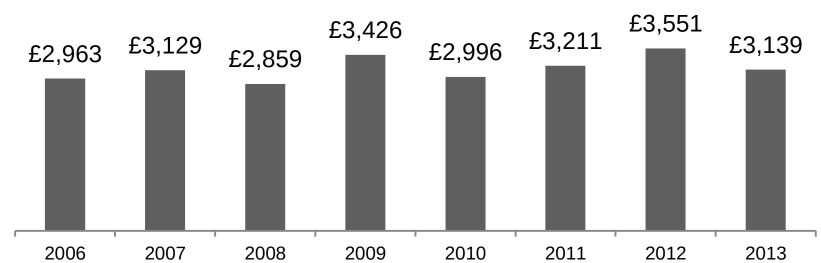
Trips (-0.4% pa)



Nights (-1.4% pa)



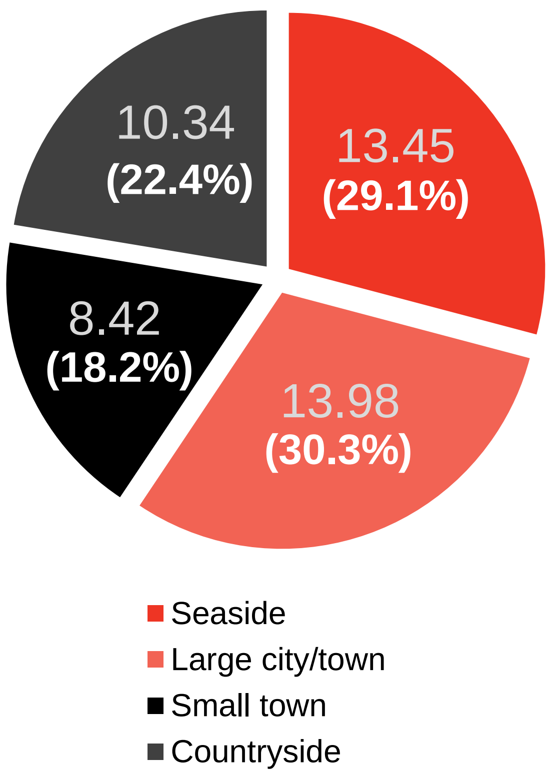
Spend (+1.5% pa)



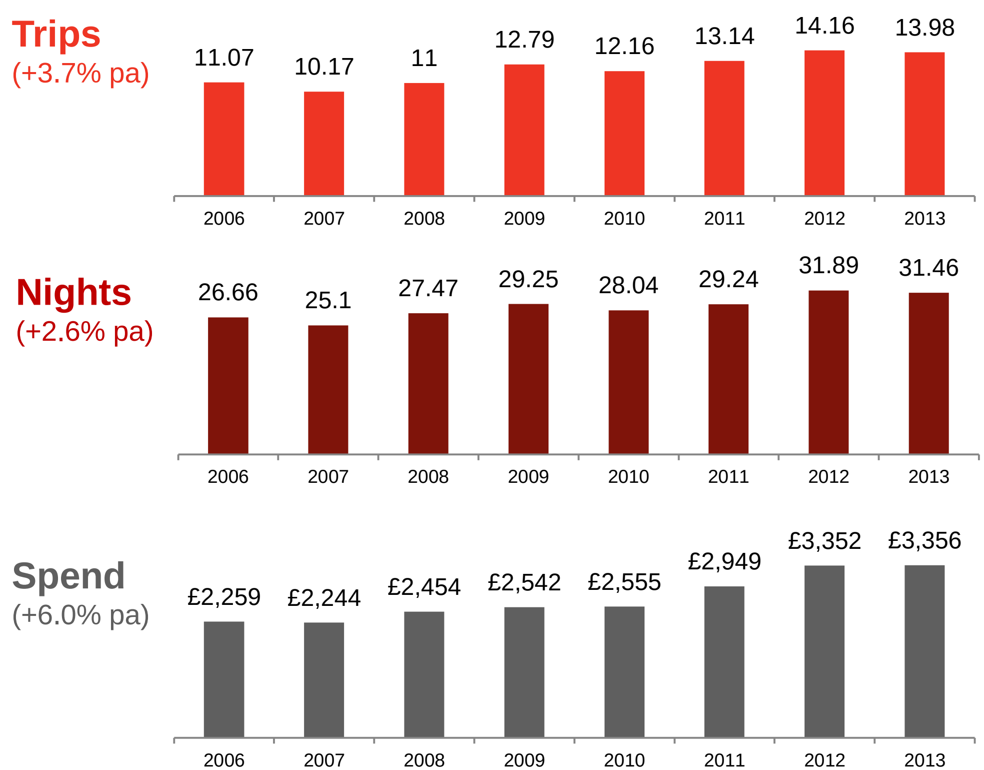
Source: Great Britain Tourism Survey, 2008-2013

Trip Destination Types:
Volume and Value context from GBTS

Holiday trips by GB residents in England, 2013 (millions)



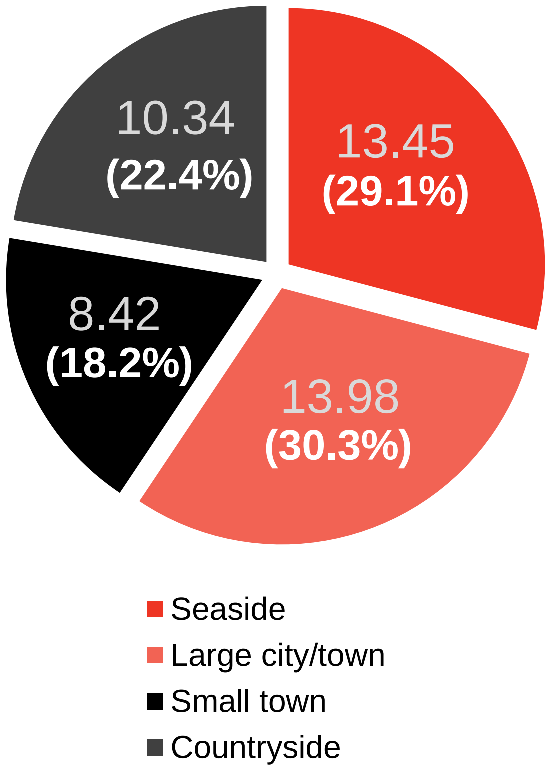
Trends in large city/town holidays in England



Source: Great Britain Tourism Survey, 2008-2013

Trip Destination Types:
Volume and Value context from GBTS

Holiday trips by GB residents in England, 2013 (millions)



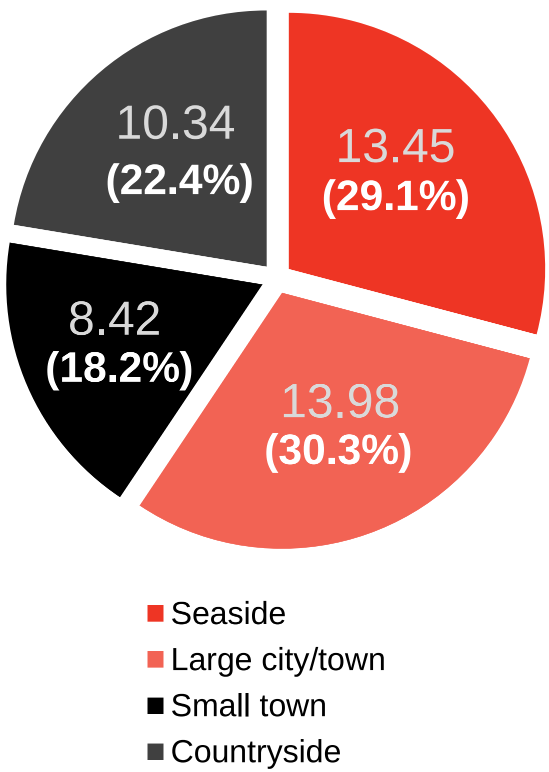
Trends in holidays to small towns in England

Source: Great Britain Tourism Survey, 2008-2013

Trip Destination Types:
Volume and Value context from GBTS

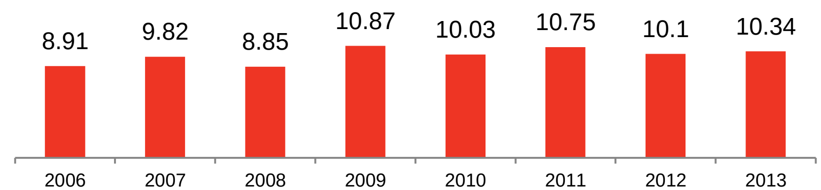
TNS

Holiday trips by GB residents in England, 2013 (millions)

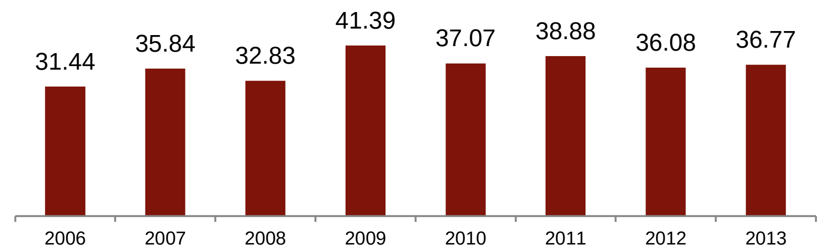


Trends in holidays to the English countryside

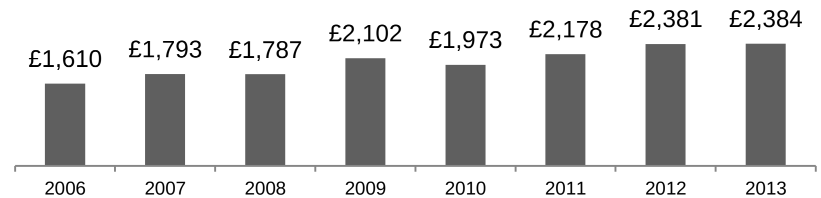
Trips
(+2.7% pa)



Nights
(+3.0% pa)



Spend
(+6.1% pa)



VisitEngland

Source: Great Britain Tourism Survey, 2008-2013

In Summary:

Seaside destinations have not benefited from the staycation trends to the same extent as other destination types – especially cities

TNS

			
Trips, per annum:	Trips, per annum:	Trips, per annum:	Trips, per annum:
-0.4%	+3.7%	+2.2%	+2.7%
Share of trips: 2006 → 13:	Share of trips: 2006 → 13:	Share of trips: 2006 → 13:	Share of trips: 2006 → 13:
34% 29%	27% 30%	18% 18%	21% 22%
Av. trip length: 2006 → 13:	Av. trip length: 2006 → 13:	Av. trip length: 2006 → 13:	Av. trip length: 2006 → 13:
4.5 nights 4.2 nights	2.4 nights 2.3 nights	3.2 nights 3.3 nights	3.5 nights 3.6 nights

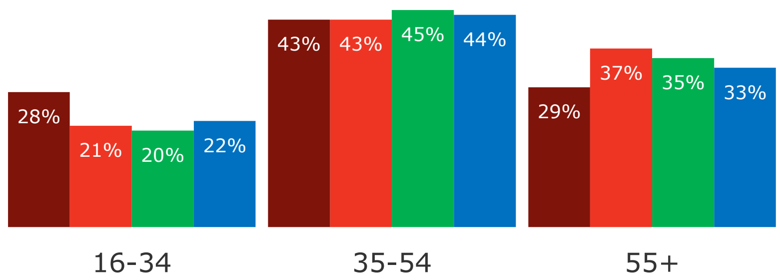
VisitEngland™

Source: Great Britain Tourism Survey, 2008-2013

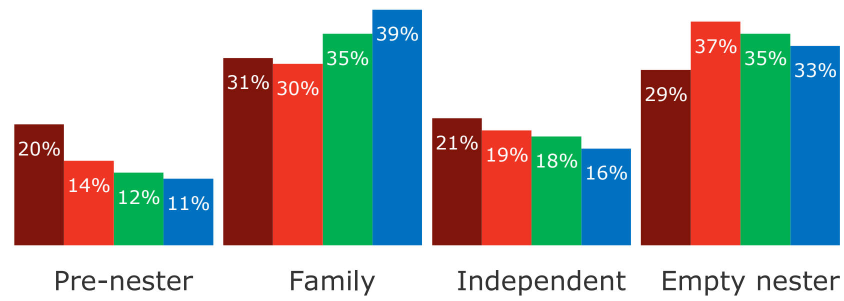
Other characteristics (from GBTS 2013):

Major differences in the profile of holidaymakers visiting different types of destination………

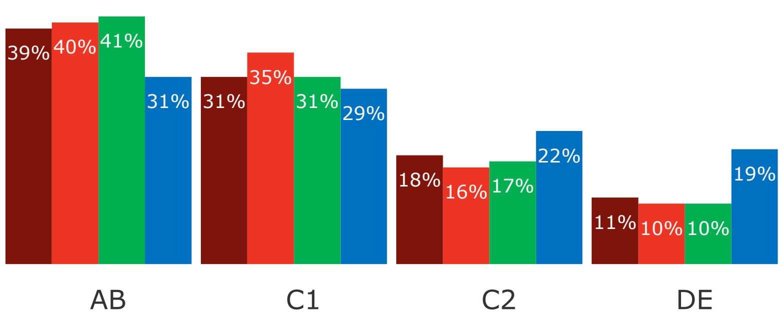
Age (% of total)



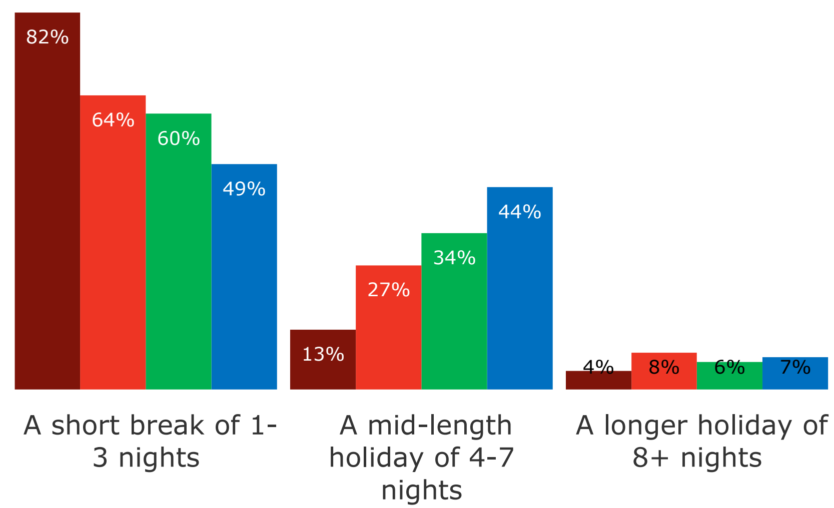
Lifecycle (% of total)



Socio Economic Group (% of total)



Length of holiday (% of total)



LEGEND:			
Cities / large towns	Small towns	Countryside	Seaside

VisitEngland

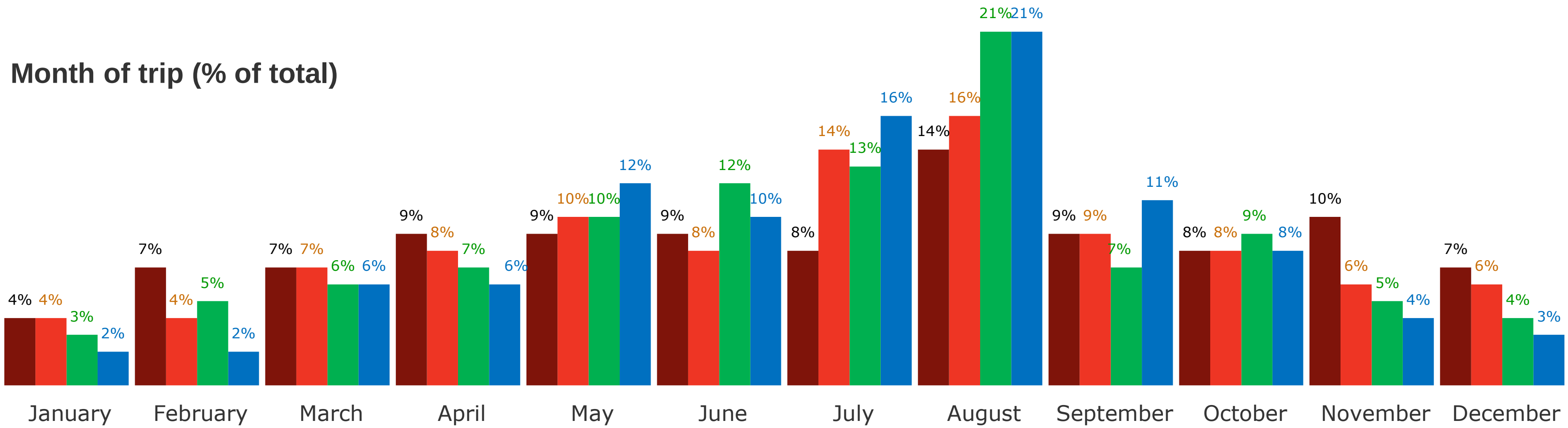
SOURCE:
GBTS, 2013

Other characteristics (from GBTS 2013):
Seaside holidays much more seasonal than city breaks whilst accommodation usage varies considerably

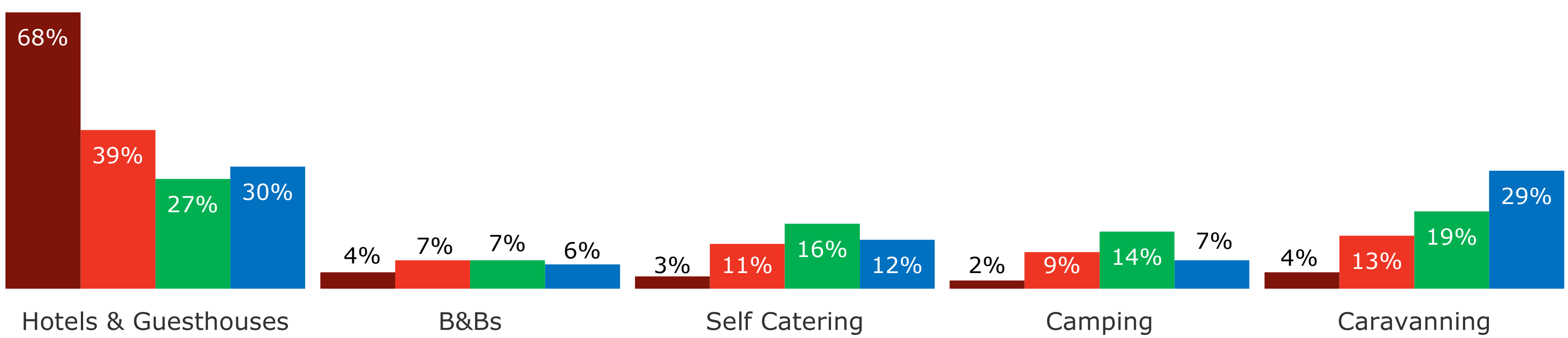
Understanding Visitor Satisfaction, 2013-14

TNS

Month of trip (% of total)



Accommodation type (% of total)



VisitEngland

SOURCE: GBTS, 2013

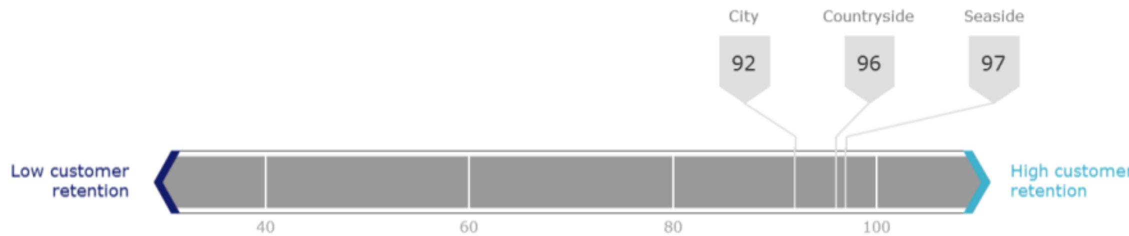
LEGEND:			
Cities / large towns	Small towns	Countryside	Seaside

What visitors claim are 'extremely important' and how varies by destination: Greater importance for many seaside attributes possibly reflecting longer trips and more families.

	TOTAL	SEASIDE	COUNTRYSIDE	ALL CITIES	CITIES exc London
Sample Size (July 2011-June 2014)	*13188*	*4223*	*3627*	*4093*	*2904*
Good quality accommodation	38	41	39	36	37
Accommodation that offers value for money	38	41	35	38	39
Easily accessible for those with impairments *	37	38	32	40	40
A place where I feel safe and secure	36	41	35	33	34
Unspoilt countryside	35		35		
Good value for money generally	34	39	31	31	32
Clean and well-maintained beaches	34	36			
Clean and tidy environment	32	36	33	27	29
Good quality food, drink and dining	32	35	32	31	33
Beaches which are safe and suitable for bathing	29	31			
Welcoming and friendly people	28	32	29	25	28
Variety of accommodation to choose from that suits my needs	28	31	26	27	28
Interesting towns and villages to visit	27		27		
Easy to find useful information about the destination when planning	26	29	25	26	26
Easy to book your trip/different parts of your trip in advance	26	28	24	26	26
A destination that is not too expensive to get to	26	29	21	27	28
Attractive/well maintained town/city centre - SEASIDE	26	26			
Opportunities to eat/drink local food and produce	25	28	26	24	25
Very high levels of customer service	24	27	23	22	23
Clear signposting that helps you find your way around the destination	24	26	22	25	25
Wide range of attractions and things to do	24	28	19	26	23
Opportunities to see famous buildings and monuments	24			25	22
Attractive/well maintained town/city centre - CITIES	24			24	25
Easy to find useful information about the destination when you're there	23	24	22	24	24
Overall availability of deals and discounts for the destination	21	25	17	22	22
A destination that doesn't take too long to get to	21	23	18	22	23
Availability of reasonably priced car parking	21	24	20	20	22
Opportunities to visit museums/galleries and contemporary arts	21	21	19	22	20
Good range of shopping opportunities	19			19	20
Easy to get around by public transport	18	19	11	23	20
Availability of individual/independent local shops	18	21	16	17	18
A destination that is easy to get to by public transport	17	18	10	23	21
Good range of outdoor activities - COUNTRYSIDE	15		14		
Good range of water-based/beach activities	15	15			
Availability of festivals, music, sporting and cultural events	13	14	9	17	15
Good nightlife	12			12	12

* Only asked of individuals who have / travelled with someone with an impairment

SEASIDE HOLIDAYS IN ENGLAND, 2011-2014: STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained



High level strengths

A04. A place where I feel safe and secure

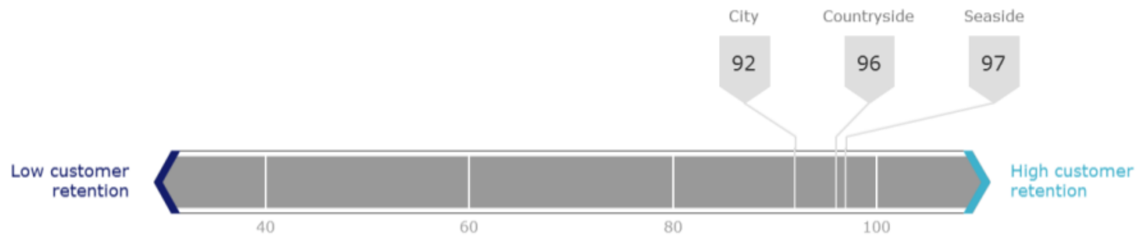
Medium level strengths

A16. Good quality accommodation
A05. Clean and tidy environment
A02. Welcoming and friendly people
A33. Clean and well-maintained beaches
A18. Variety of accommodation to choose from that suits my needs
A03. Very high levels of customer service
A17. Accommodation that offers value for money
A34. Beaches which are safe and suitable for bathing

Low level strengths

A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance

SEASIDE HOLIDAYS IN ENGLAND, 2011-2014: WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase



High level weaknesses

None

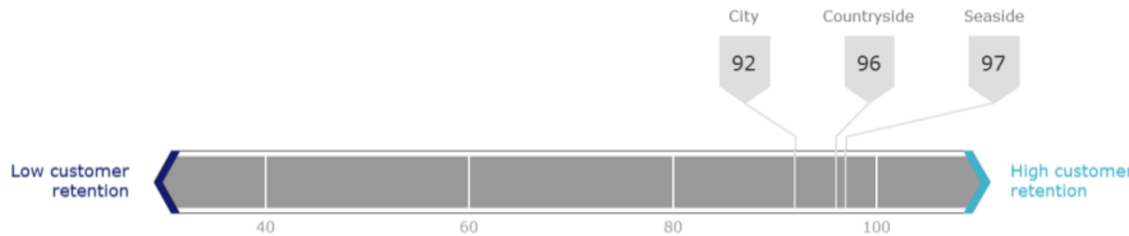
Medium level weaknesses

None

Low level weaknesses

A32. Good range of outdoor activities
A19. Good quality food, drink and dining
A23. Wide range of attractions and things to do
A20. Opportunities to eat/drink local food and produce
A01. Good value for money generally
A21. Easy to find useful information about the destination when you're there
A29. Attractive/well maintained town/city centre
A35. Good range of water-based/beach activities
A22. Availability of festivals, music, sporting and cultural events
A15. Availability of reasonably priced car parking
A12. A destination that is easy to get to by public transport

COUNTRYSIDE HOLIDAYS IN ENGLAND, 2011-2014: STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained



High level strengths

A31. Unspoilt countryside
A05. Clean and tidy environment
A04. A place where I feel safe and secure

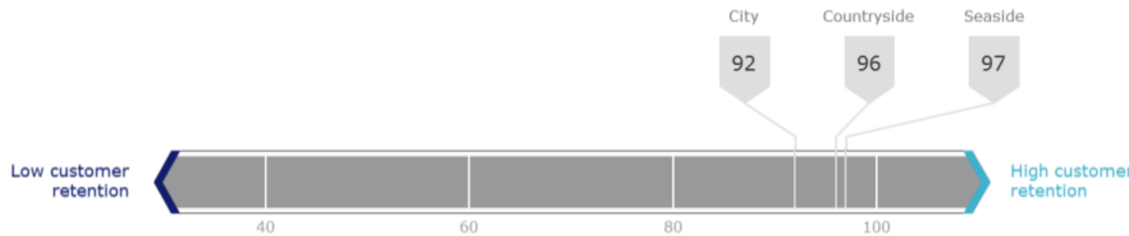
Medium level strengths

A30. Interesting towns and villages to visit
A16. Good quality accommodation
A02. Welcoming and friendly people
A18. Variety of accommodation to choose from that suits my needs
A19. Good quality food, drink and dining
A03. Very high levels of customer service
A17. Accommodation that offers value for money
A08. Easy to find useful information about the destination when planning the trip

Low level strengths

A09. Easy to book your trip/different parts of your trip in advance

COUNTRYSIDE HOLIDAYS IN ENGLAND, 2011-2014: WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase



High level weaknesses

None

Medium level weaknesses

None

Low level weaknesses

A01. Good value for money generally
A20. Opportunities to eat/drink local food and produce
A21. Easy to find useful information about the destination when you're there
A23. Wide range of attractions and things to do
A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments) *
A22. Availability of festivals, music, sporting and cultural events
A13. Easy to get around by public transport
A12. A destination that is easy to get to by public transport

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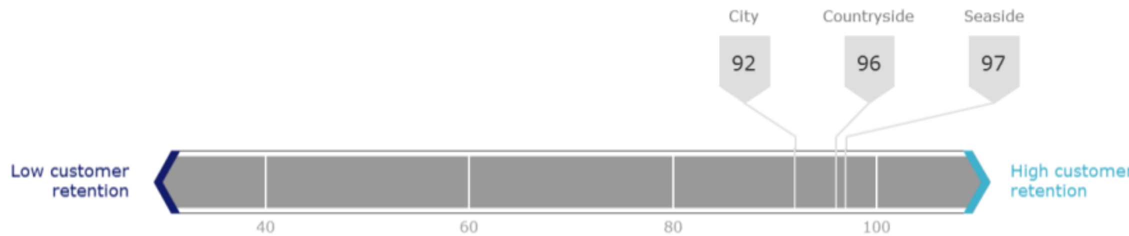
* Only asked of individuals who have / travelled with someone with an impairment

CITY BREAKS IN ENGLAND, 2011-2014: STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained



High level strengths

None

Medium level strengths

A23. Wide range of attractions and things to do
A19. Good quality food, drink and dining
A16. Good quality accommodation

Low level strengths

A26. Opportunities to see famous buildings and monuments
A27. Good range of shopping opportunities
A25. Opportunities to visit museums/galleries and contemporary arts
A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance

CITY BREAKS IN ENGLAND, 2011-2014: WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase

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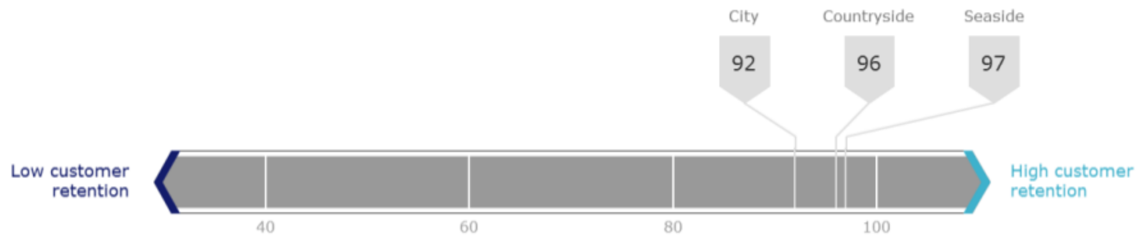

High level weaknesses

None

Medium level weaknesses

A14. Clear signposting that helps you find your way around the destination

Low level weaknesses

A29. Attractive/well maintained town/city centre
A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments) *
A21. Easy to find useful information about the destination when you're there
A18. Variety of accommodation to choose from that suits my needs
A03. Very high levels of customer service
A05. Clean and tidy environment
A24. Availability of individual/independent local shops
A01. Good value for money generally
A06. Overall availability of deals and discounts for the destination
A10. A destination that is not too expensive to get to
A15. Availability of reasonably priced car parking

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