

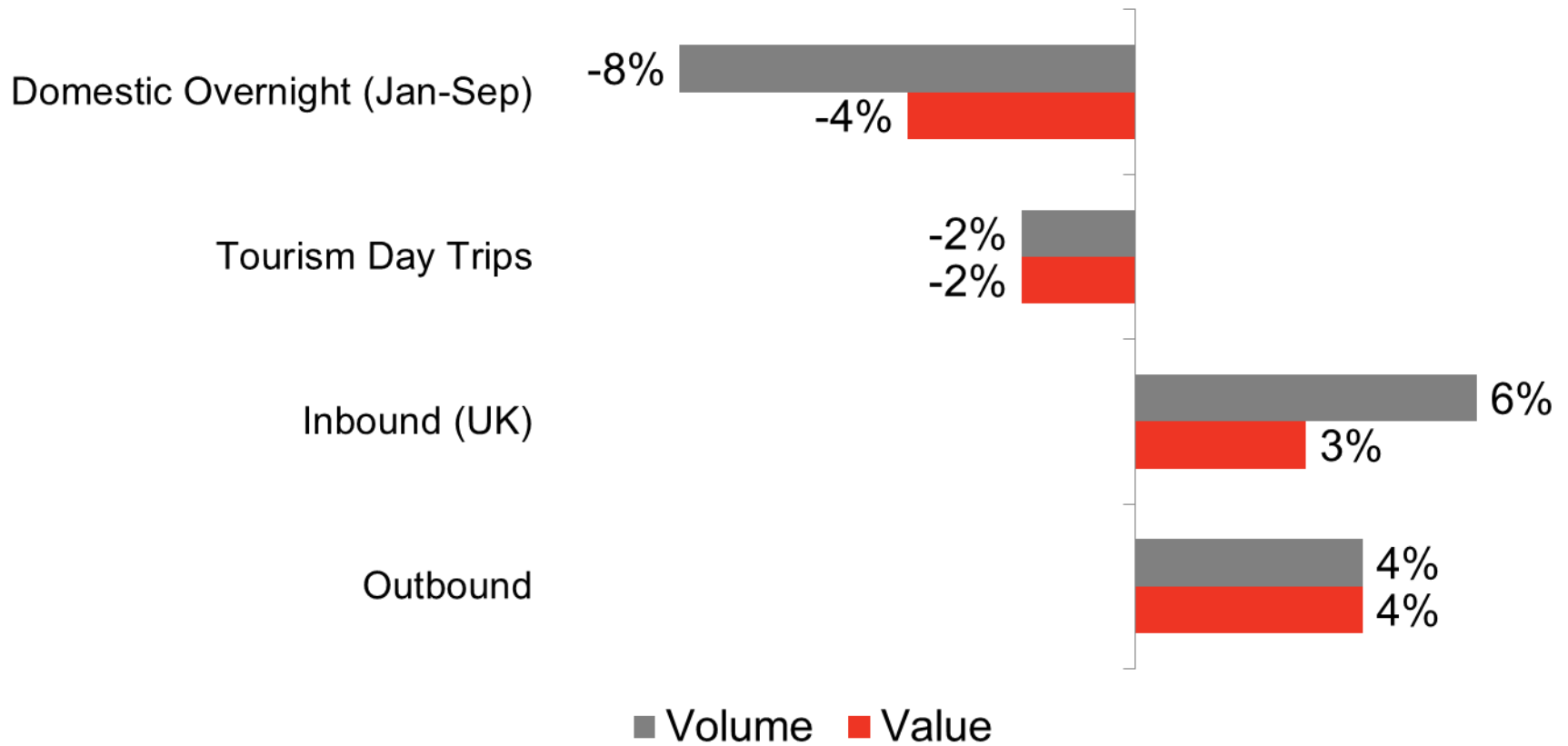
National Research and Visitor Satisfaction Update

Sharon Orrell
Head of Research and
Insights, VisitEngland

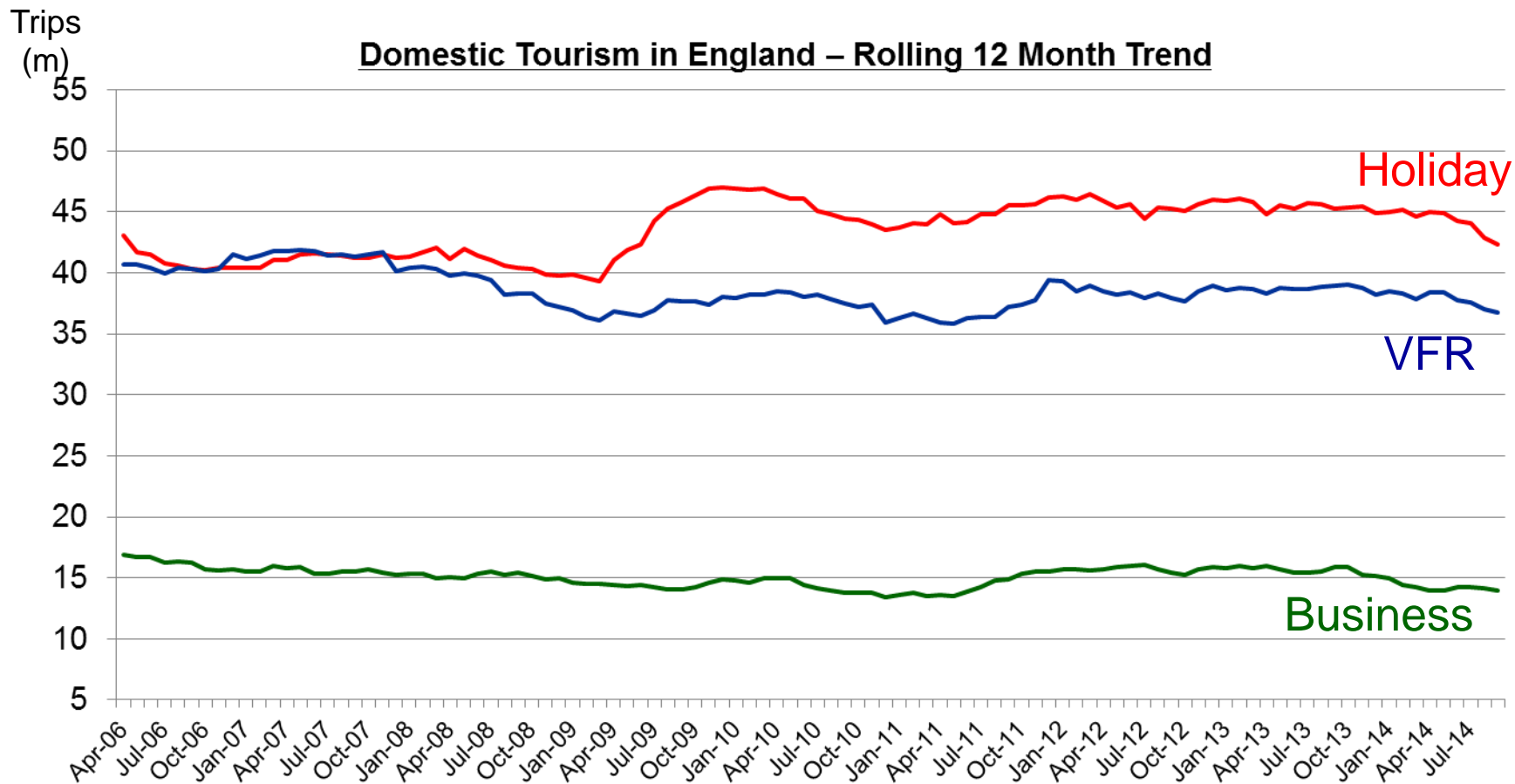
10 March 2015



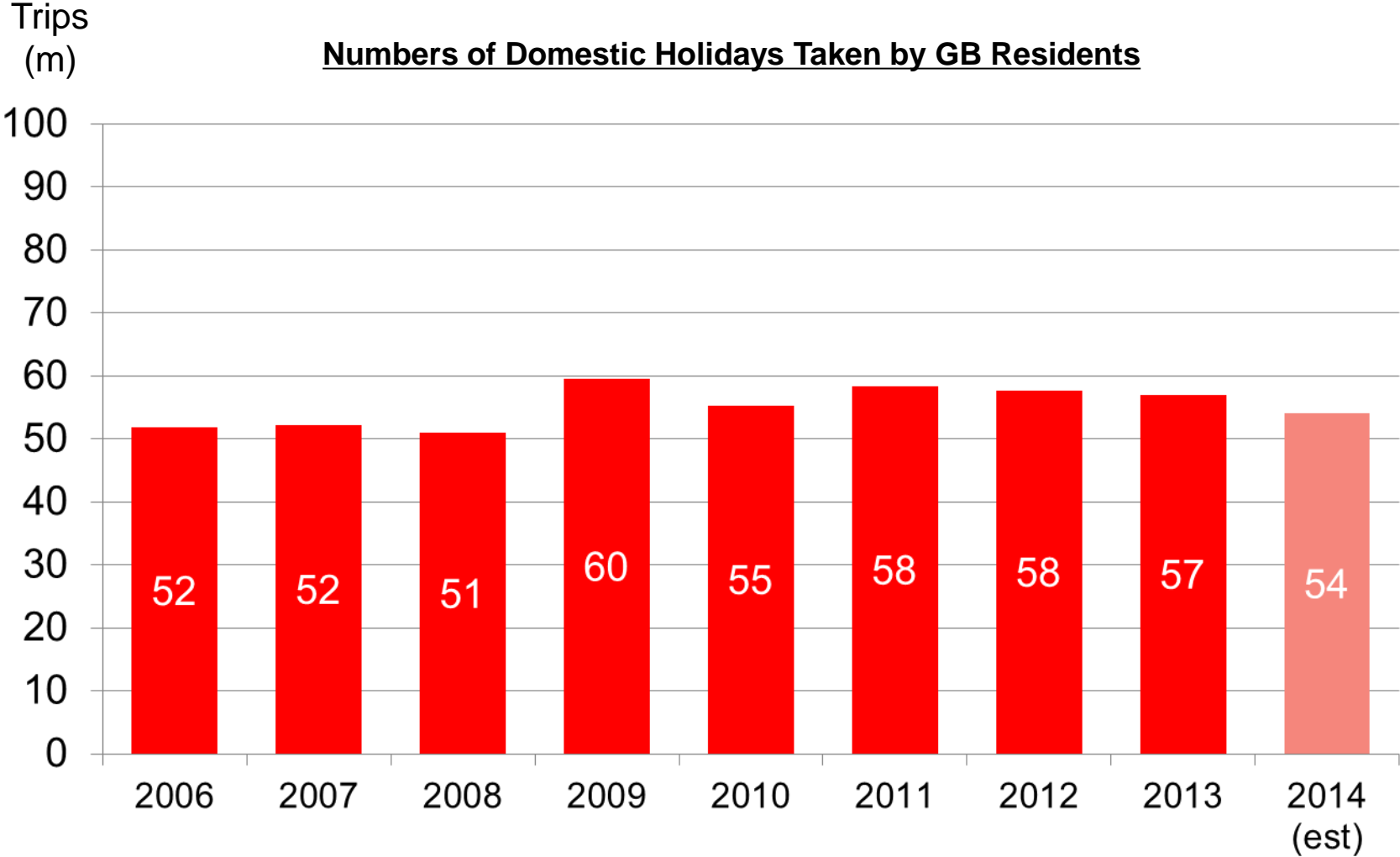
2014 – England Headline Performance Trends



Domestic Overnight Tourism – Trends Since 2006

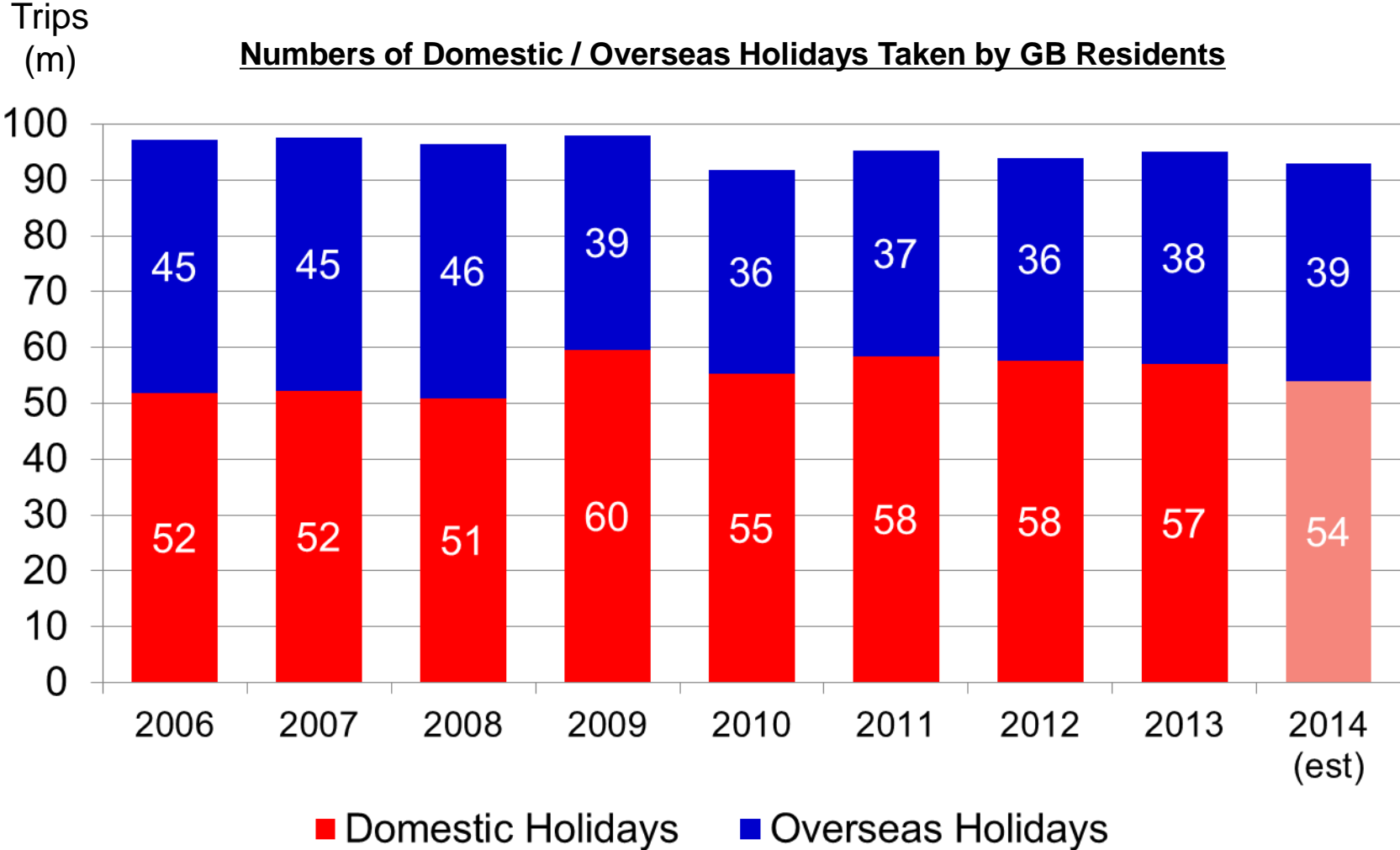


If this trend continues to the end of the year (1)



Source: GB Tourism Survey

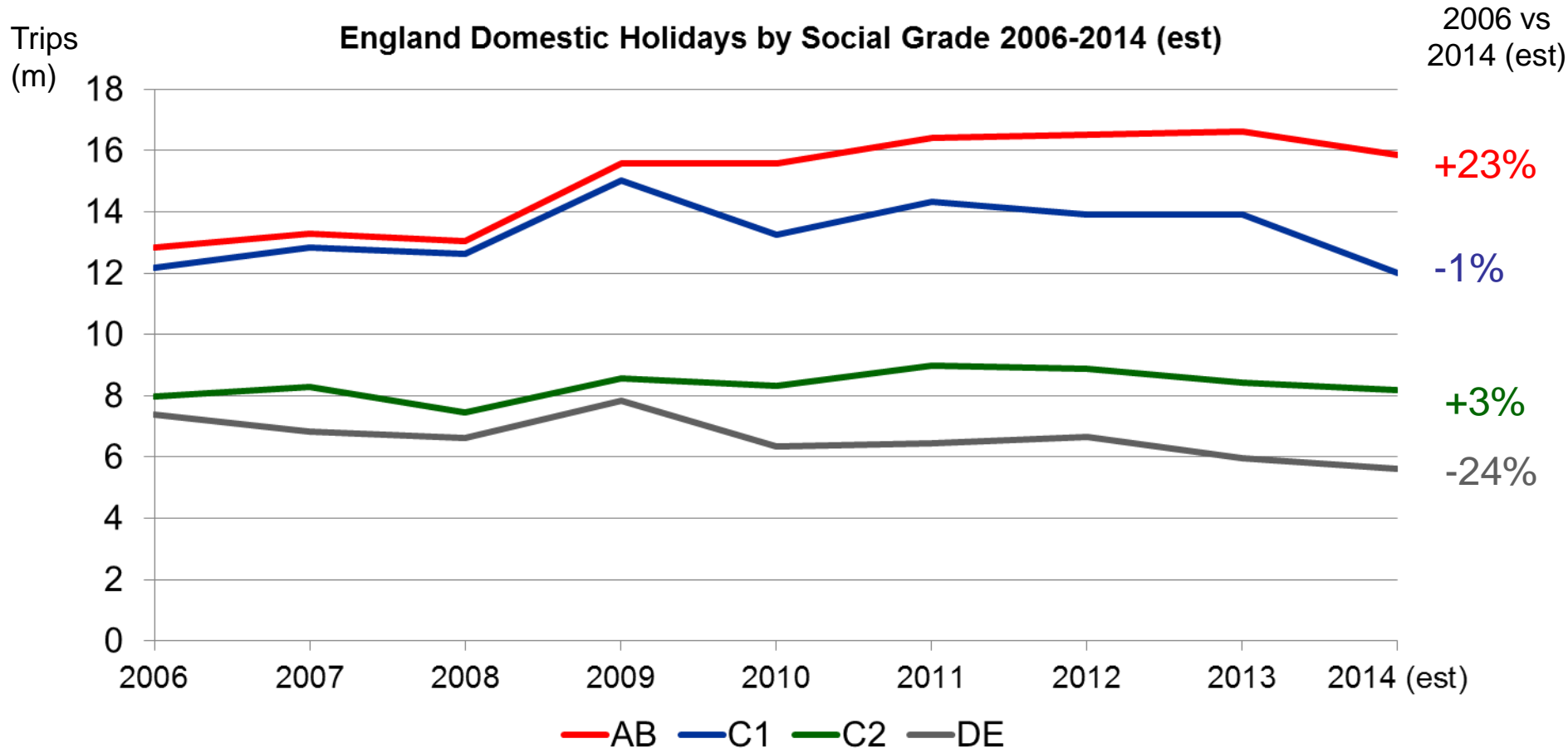
If this trend continues to the end of the year (2)



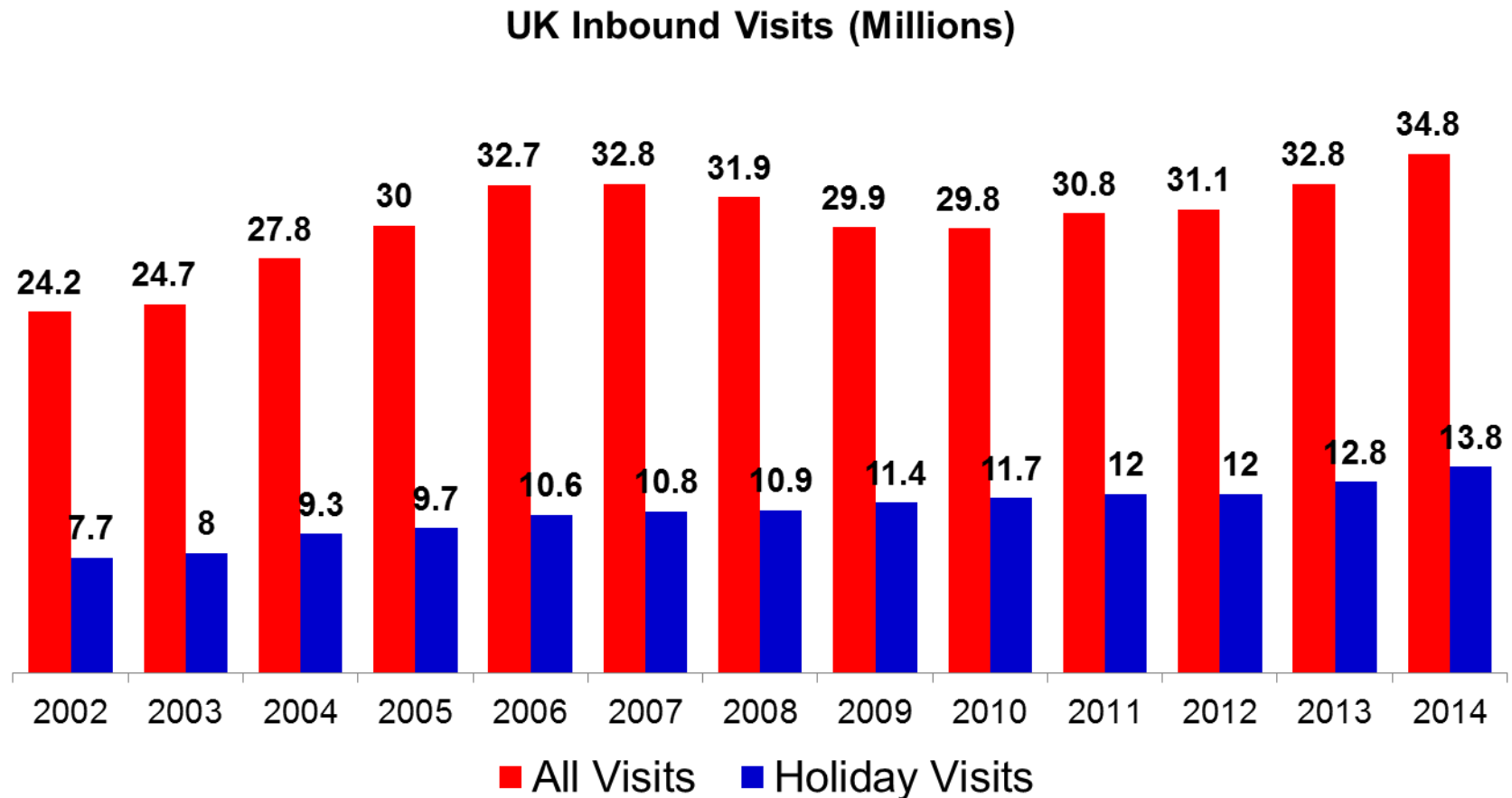
Source: GB Tourism Survey / International Passenger Survey

Unpicking the trends:

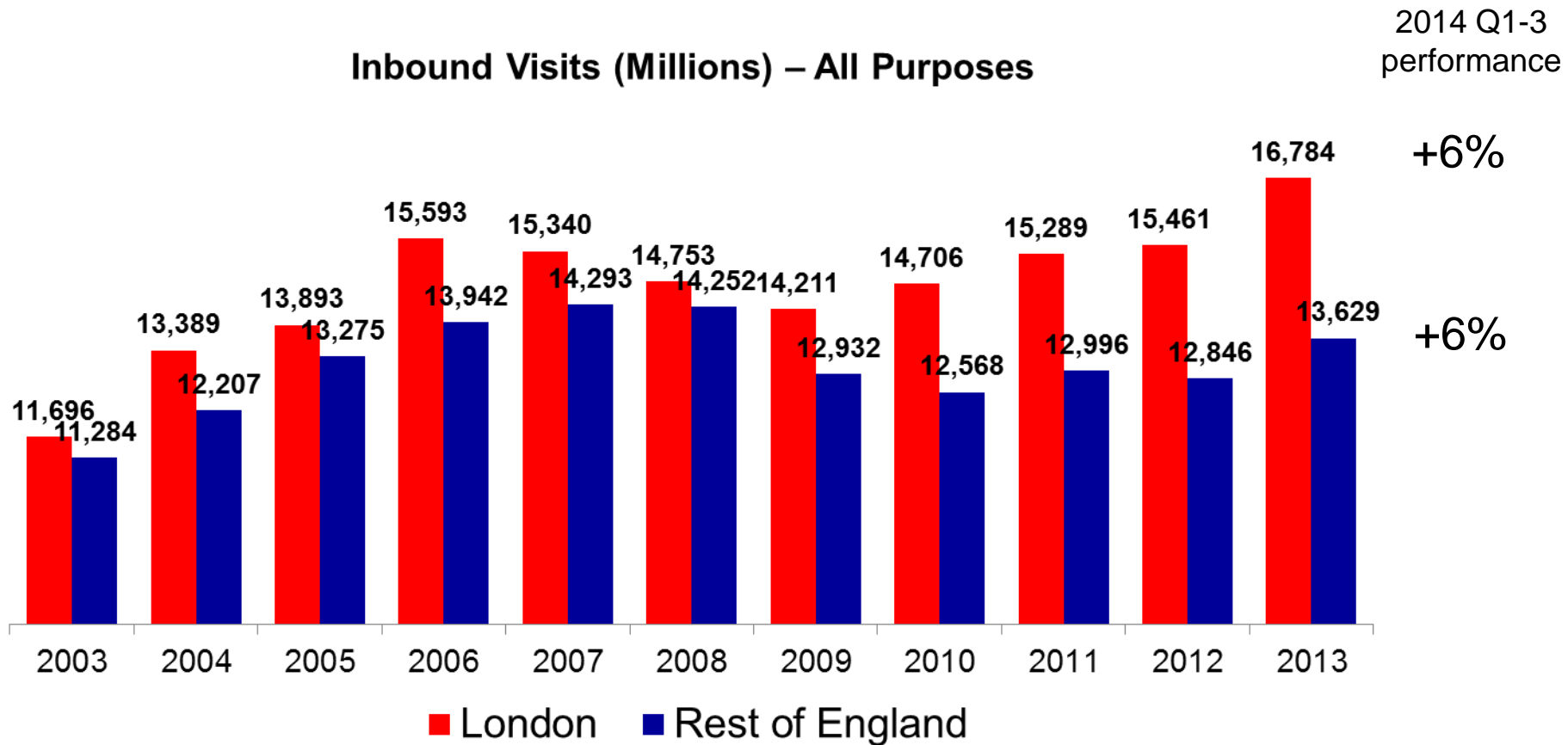
Recession and recovery have affected different groups in different ways



Inbound visits reached record levels in 2014



In recent years, London volumes have outperformed ROE, though in 2014 growth trends have been more consistent

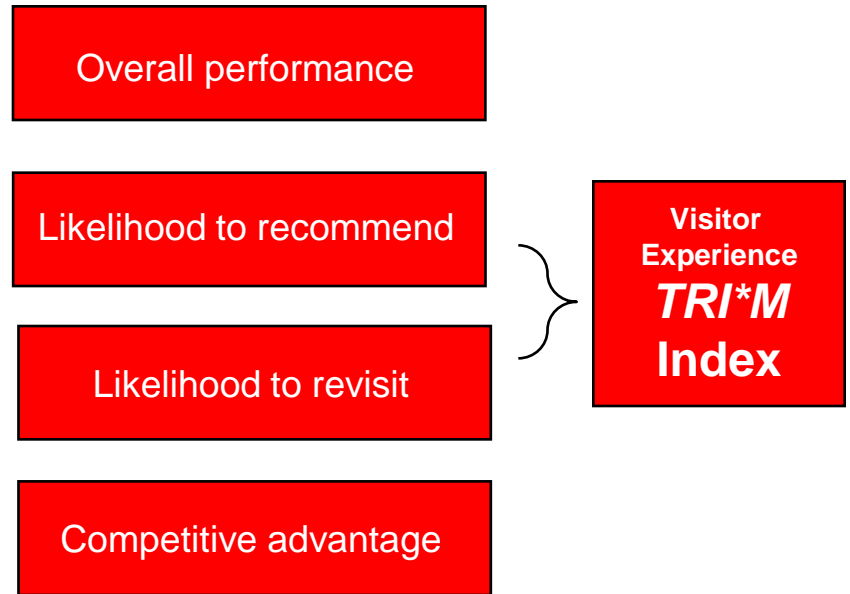


The Visitor's View



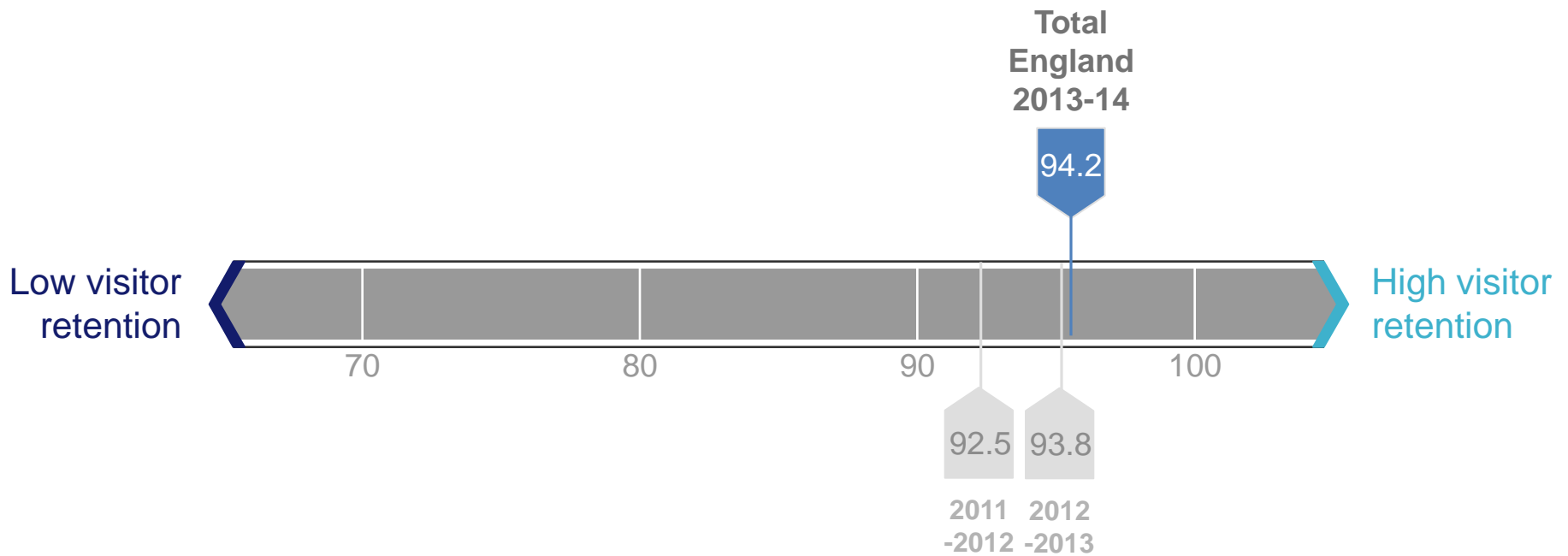
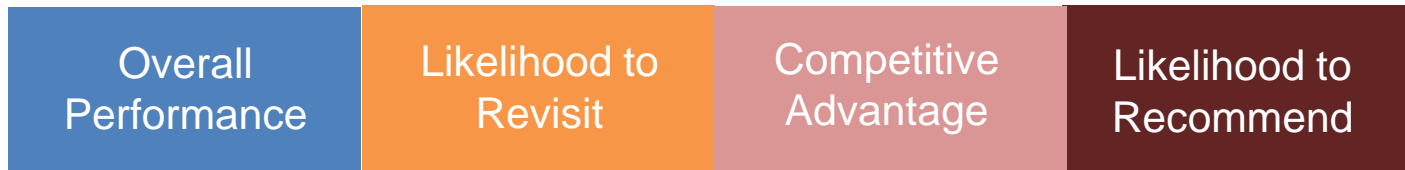
4 key questions to index the visitor experience in the destination

- 🌀 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?



Visitor Experience TRI*M Index

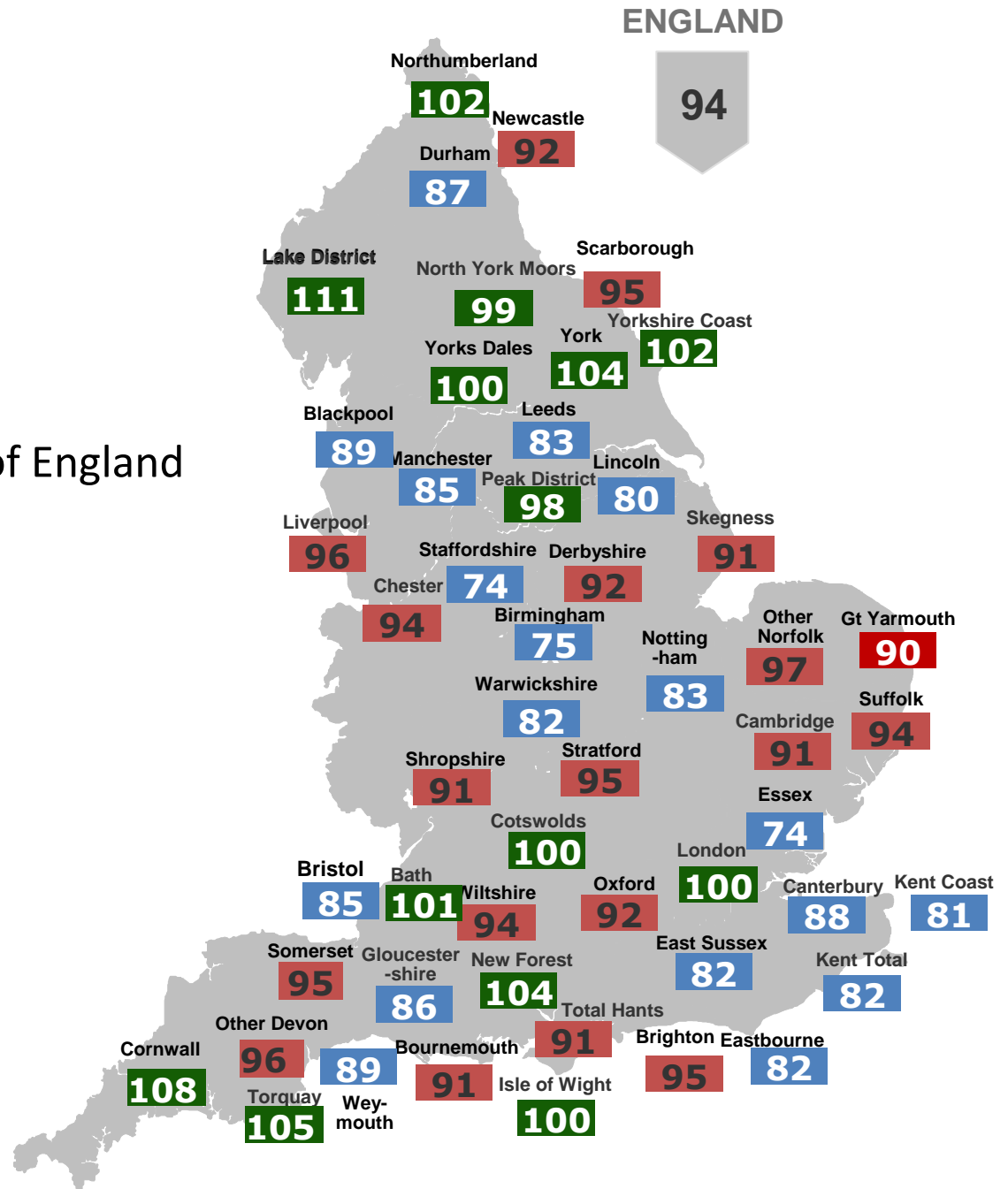
Some evidence of small but gradual increases in satisfaction levels over last 4 years



Every trip is different...



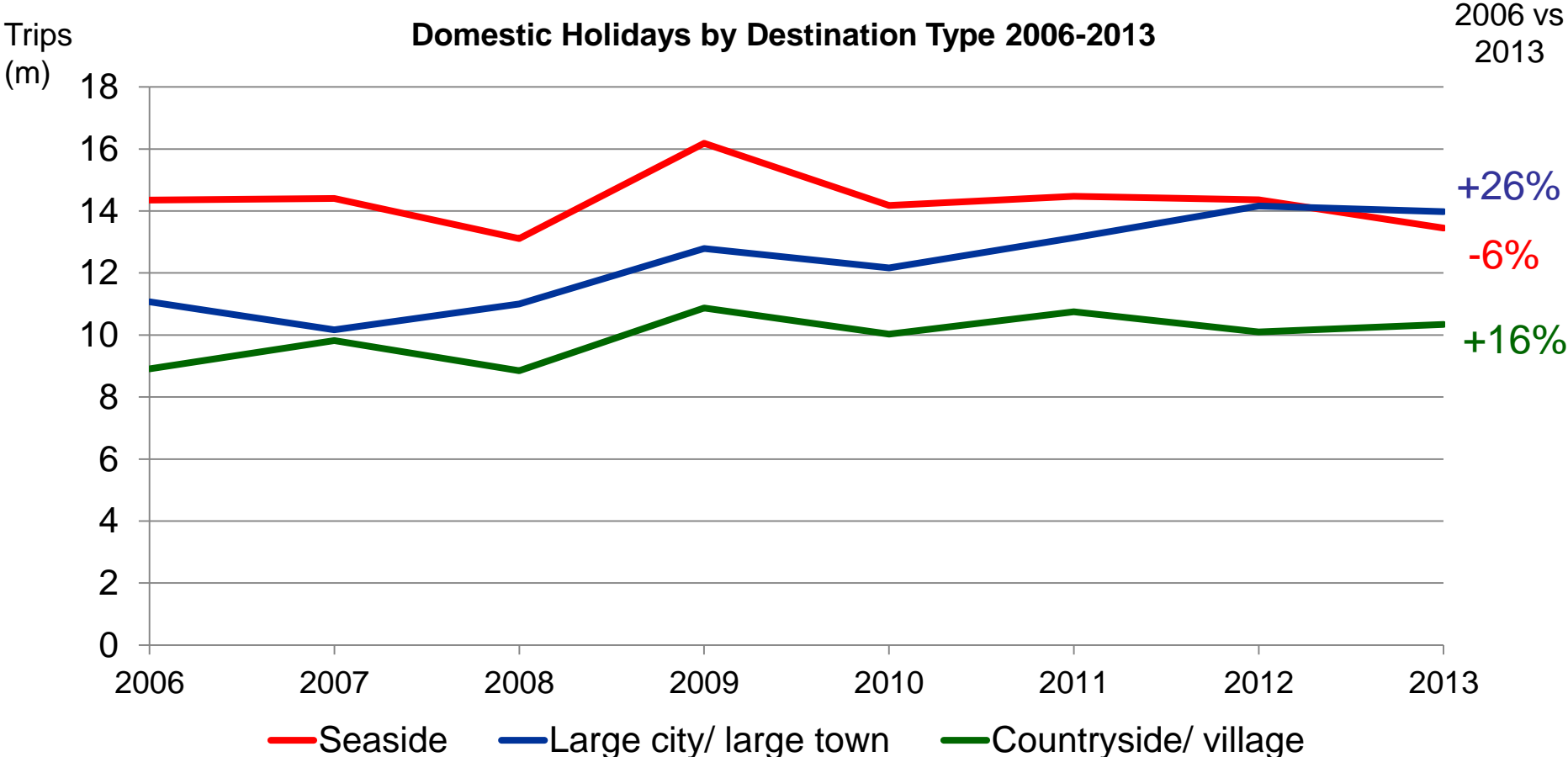
The Satisfaction Map of England



Visitor Experience TRI*M Index Location of Holiday



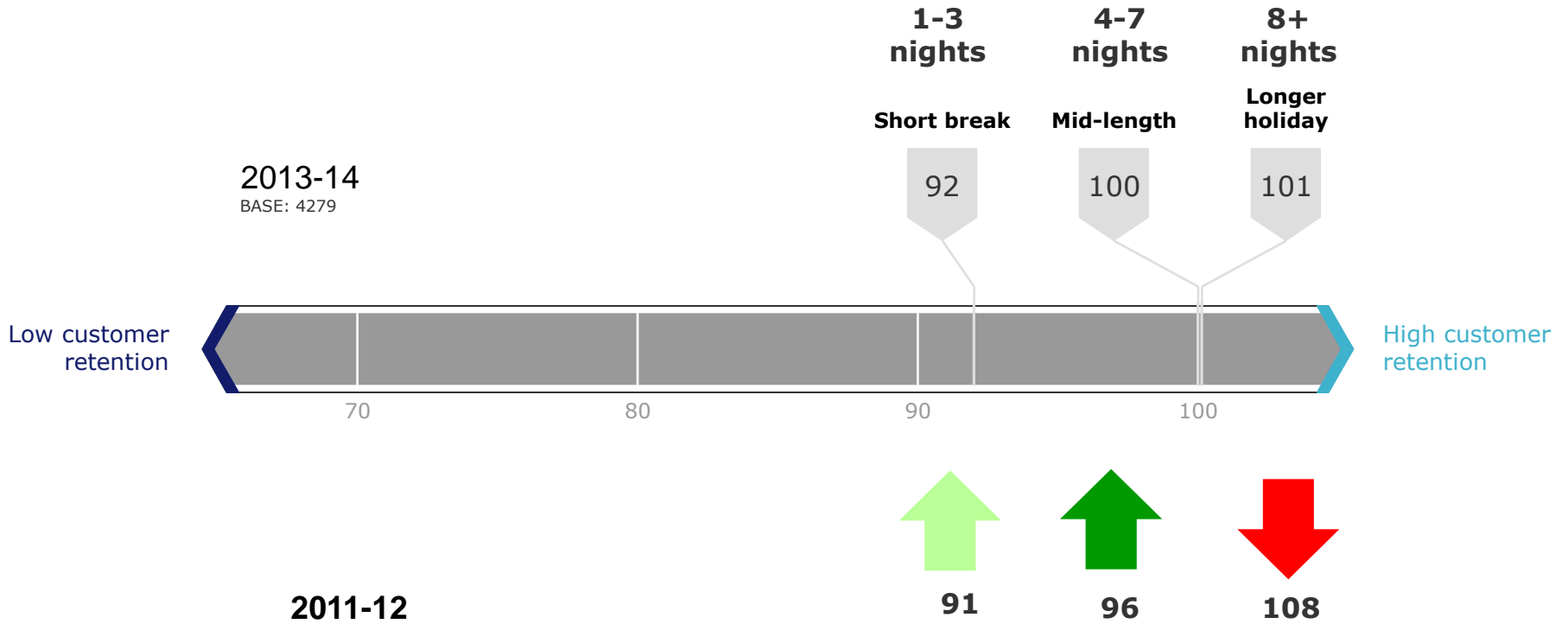
And city destinations have shown the strongest growth in recent years...



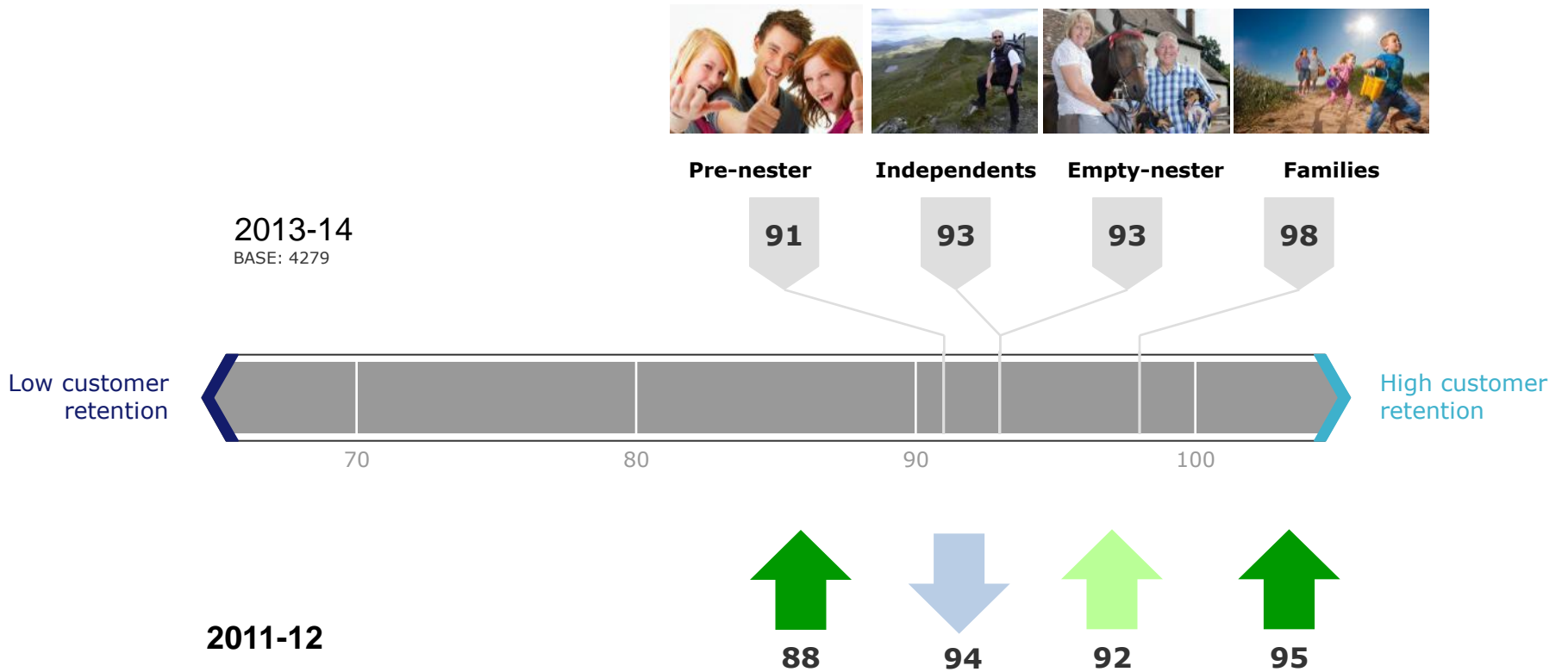
Source: GB Tourism Survey

Visitor Experience TRI*M Index Holiday Type

Understanding Visitor
Satisfaction, 2013-14



Visitor Experience TRI*M Index Lifecycle



Contrasting perceptions of England

'Much better than it was'

- Prominent view amongst older respondents and families
- More variety on offer in terms of accommodation and activities
- A sense that the domestic offer has reached the same standard as Europe – so compares well not only to the past, but to present alternatives
- Mention of bad experiences in the past and greater accountability now – ***'I remember the B&B's being like a hell-hole... they can't get away with that anymore'***

'Not good enough'

- Most prominent in pre-family group
- No comparison with past, only with abroad, and England compares poorly to the cost and quality of European destinations
- Sense that England is more expensive, and that measures of quality are different – a 4* hotel abroad is better than a 4* hotel in England
- Feel more taken care of or pampered abroad: ***"Staff treat you like a tourist abroad"***

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?'

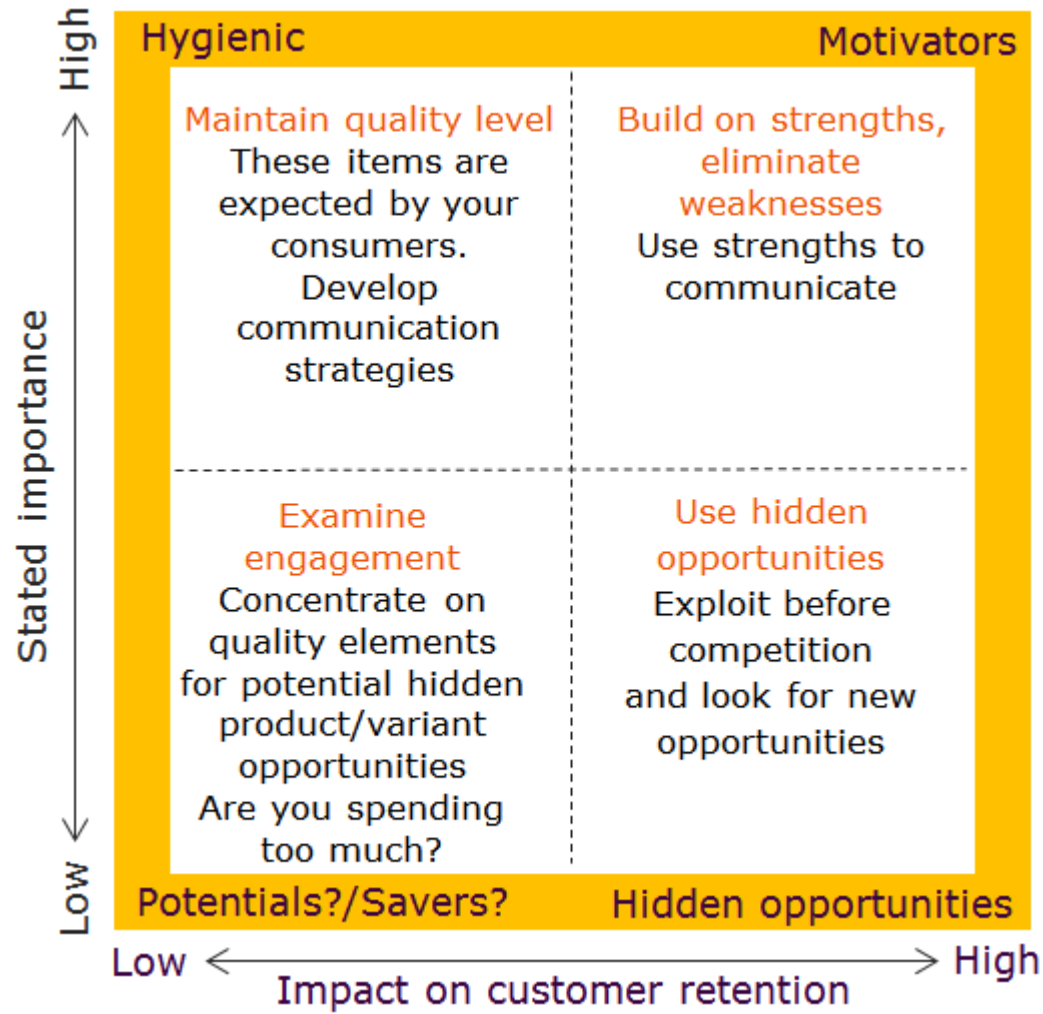
Rated in terms of how the destination performed during the visit

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

And a third dimension is derived – Impact on the Experience

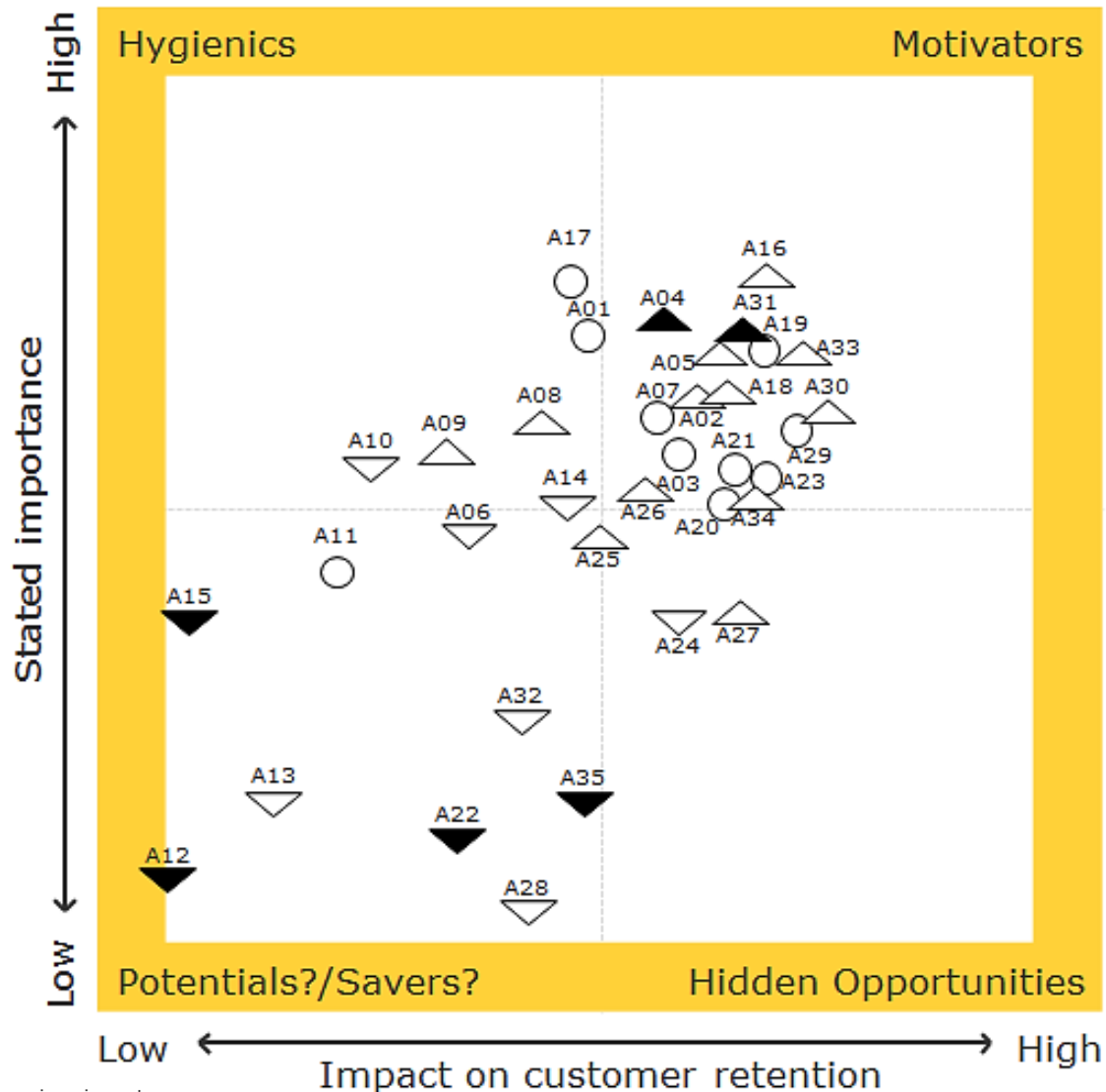
(to what extent does overall satisfaction correlate to each attribute)

Determining the drivers of satisfaction (2)



Destination England: The TRI*M Grid

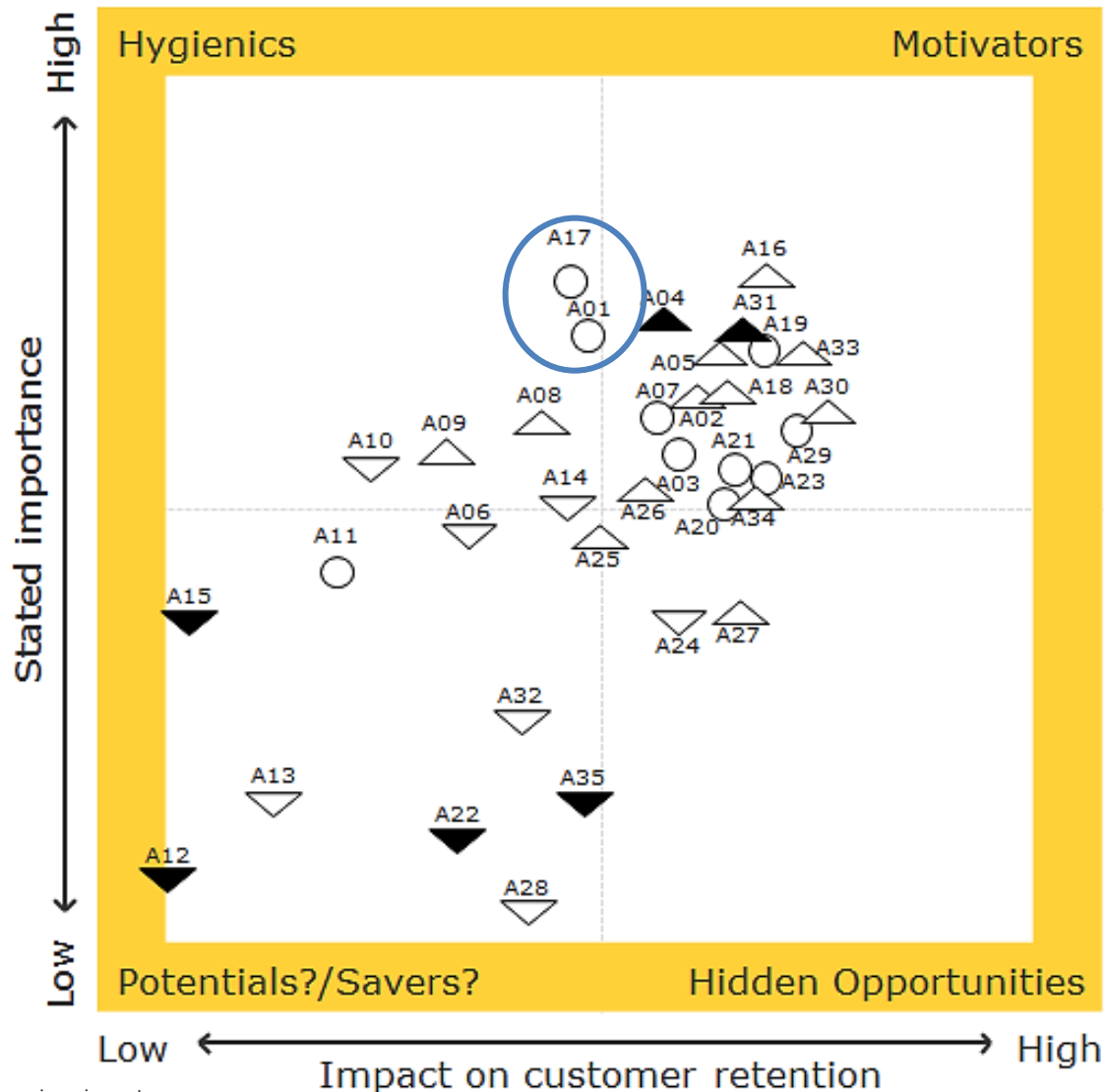
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- A03. Very high levels of customer service
- A04. A place where I feel safe and secure
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- A06. Deals and discounts for the destination
- A07. Accessible for those with impairments*
- A08. Easy to find useful info when planning
- A09. Easy to book your trip in advance
- A10. Not too expensive to get to
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- 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

Destination England: The TRI*M Grid

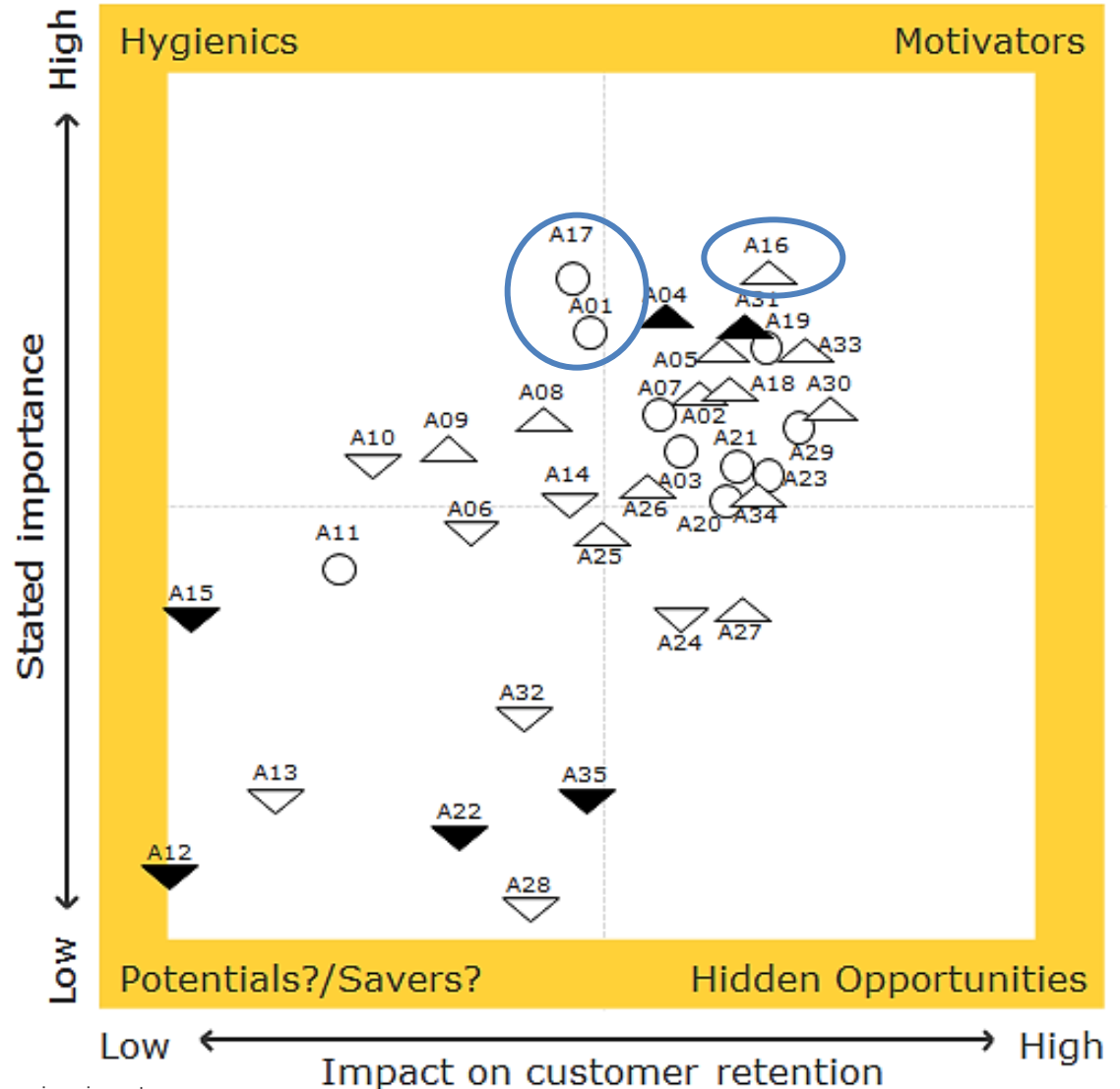
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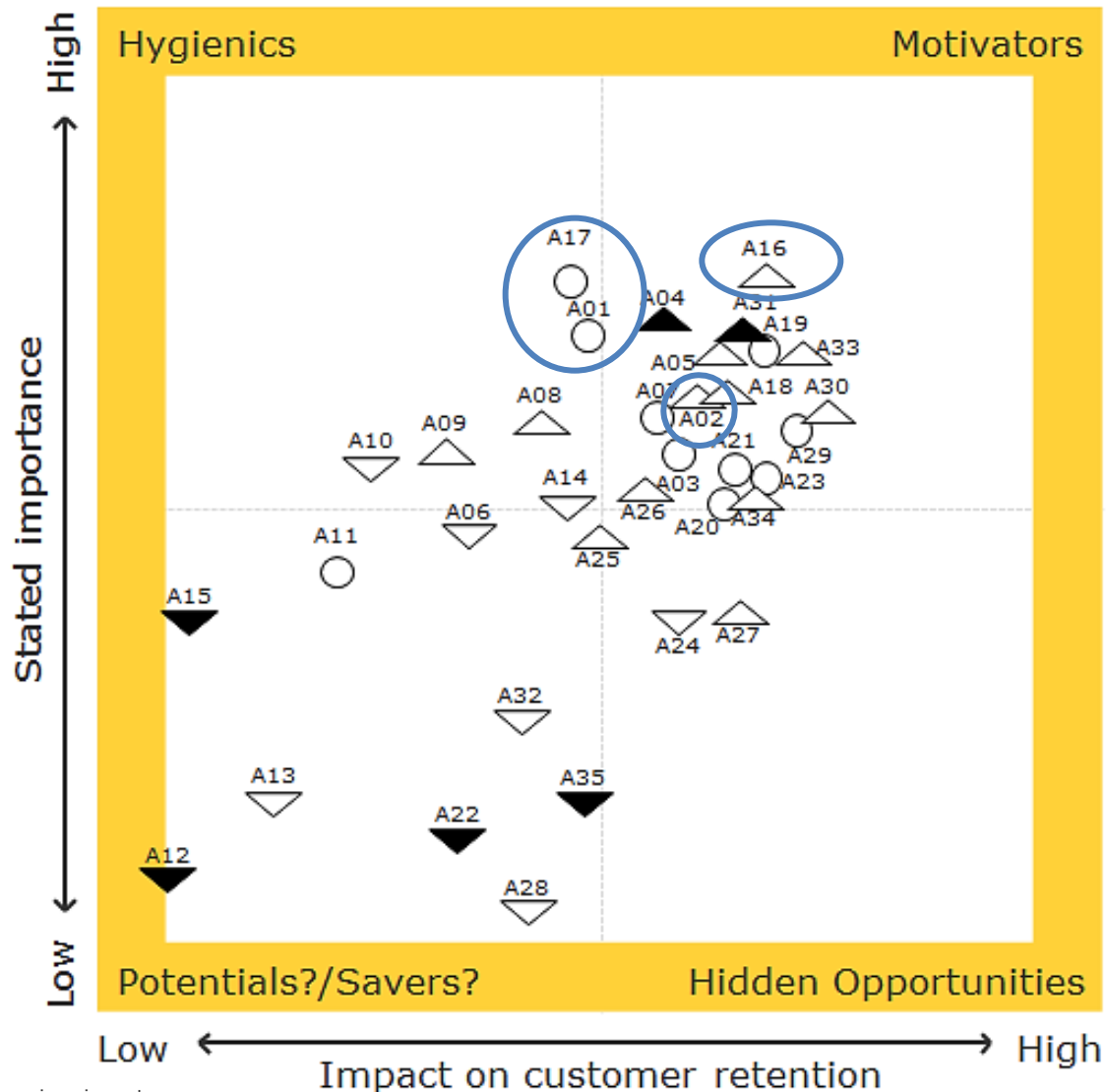
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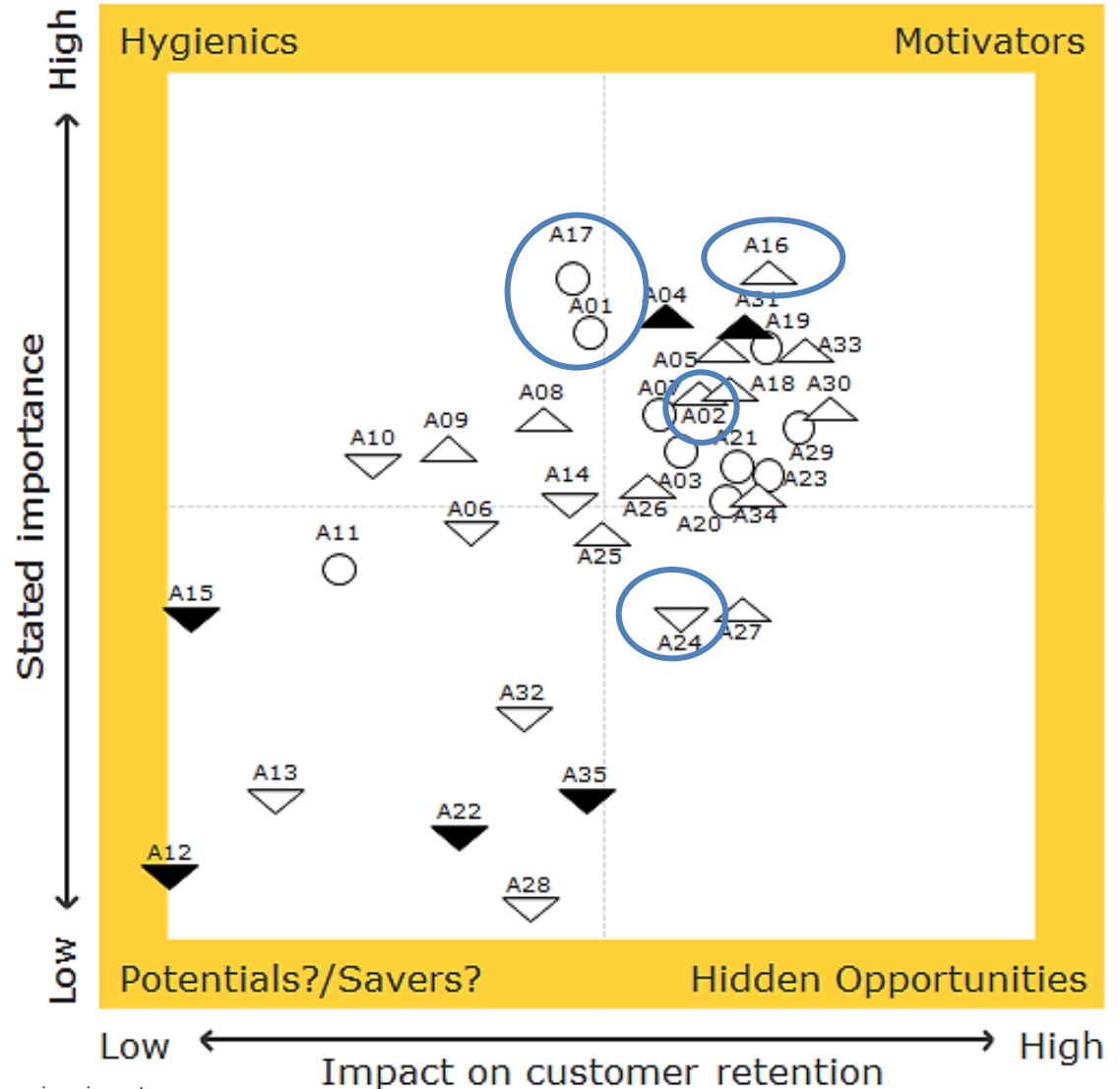
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DESTINATION ENGLAND:

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:

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

High level strengths

A31. Unspoilt countryside (RURAL)

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 (SEASIDE)

A26. Opportunities to see famous buildings and monuments (CITIES)

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

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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

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Motivations and Barriers



England viewed positively overall

Even amongst those who thought it compared negatively to destinations abroad, England was generally viewed positively – with the variety of destinations and the ability to ‘discover’ new places seen as a benefit of domestic breaks

‘England is interesting as well [as being easy]. Interesting places, good exhibitions...you get to see places that have a bit of culture about them. If you go to Bath or Liverpool or Newcastle you see how that city is different to your city.’

Pre-family group, London

‘There’s so many parts [of England] that I haven’t been to, and so many parts to explore...’

Older family group, London

BUT DON'T FORGET.....

Lack of knowledge plus broad brush prejudices can prevent consideration of much of England.

Lacking information and inspiration

- Many simply *‘don’t know what they don’t know’*
 - large swathes of the coastline and countryside are unfamiliar or not expected to be appealing
 - patchy awareness even amongst the self proclaimed more knowledgeable empty nesters
- Potential visitors have a relatively narrow repertoire of places visited or wanting to visit
 - and often only have a vague perception of not yet visited wish list places

“Liverpool, Birmingham, Leicester triangle, is there anything there to see or do?”
(London: Pre-family)

“I think the majority of seaside towns in the UK are tacky apart from Cornwall.”
(London: Pre-family)

“(South East) The wrong kind of people – not for me.”
(Derby: Empty nester)



Satisfaction and Perceptions Research – The Future

- New GB-wide survey starting April 2015
- Less detail in visitor satisfaction (overall rating + c.15 key statements)
- New approach to destination perceptions (c.40 destinations) among visitors and non-visitors
 - Overall rating
 - Thematic associations
 - Attribute associations
- Reporting still TBC, but expectation is that basic analysis will be available to all, with opportunity to purchase a more detailed report