



Bath destination report



VisitEngland Destination tracker:

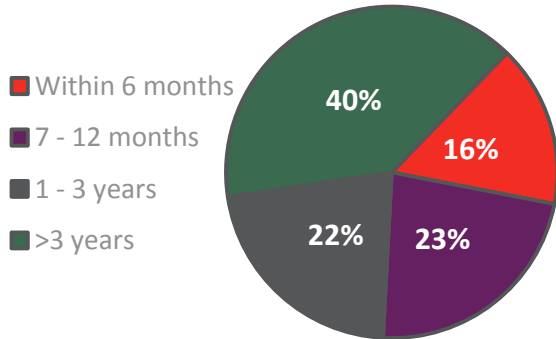
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience measures** such as, visitation, spend, stay length, satisfaction and advocacy within individual destinations. As well as the **imagery perceptions** of each destination.
- In the report there are 3 samples for comparison; those from whom this destination was the most recently visited, those who claim to visit a city destinations at C52 and finally a GB average.
- All respondents are GB holiday takers, having taken a GB break in the past 12 months or are expecting to in the next 12 months. This accounts for approx. 49% of the population.
- Significant differences will be indicated by a **black**↑/**orange**↓ arrow against city destinations and a **blue**↑/**red**↓ against GB.
- This report provides a snapshot of:
 1. A demographic split of destination visitors
 2. The behaviours exhibited at the destination: How loyal are they to the destination and how satisfied were they with their trip?
 3. How GB holiday makers perceive this destination and how does it compare with others?
- Finally there is a summary of findings.

Who is visiting?

Ever Visited Bath :

55%

Time since last visit



Visited destination in the last 3 years

| Gender | Bath | Cities | Great Britain |
|--------|------|--------|---------------|
| Male | 45% | 51% | 49% |
| Female | 55% | 49% | 51% |

| Age | Bath | Cities | Great Britain |
|-------|-------|--------|---------------|
| 18-24 | 16% | 16% | 14% |
| 25-34 | 26%↑↑ | 18% | 16% |
| 35-44 | 17% | 17% | 17% |
| 45-54 | 16% | 18% | 18% |
| 55-64 | 9%↓↓ | 15% | 15% |
| 65+ | 15% | 16% | 20% |

| Region of origin | Bath | Cities | Great Britain |
|-------------------------------|-------|--------|---------------|
| Wales | 6% | 5% | 5% |
| Scotland | 6% | 10% | 9% |
| North East | 1%↓↓↓ | 5% | 4% |
| North West | 12% | 12% | 11% |
| Yorkshire/ Humberside | 5%↓ | 8% | 9% |
| East Midlands | 6% | 7% | 7% |
| West Midlands | 10% | 8% | 9% |
| East Anglia / East of England | 5%↓↓↓ | 10% | 10% |
| Greater London | 20%↑↑ | 13% | 13% |
| South East | 16% | 12% | 14% |
| South West | 13%↑↑ | 9% | 9% |

*Please note respondents can have visited more than one destination in the last 3 years.

AROUND HALF OF DOMESTIC TRAVELLERS HAVE VISITED BATH. THE VISITOR PROFILE OF BATH IS SKEWED TOWARD FEMALES AND YOUNGER VISITORS. COMPARED TO OTHER CITIES, THERE ARE SIGNIFICANTLY MORE VISITORS TO BATH WHO ARE AGED 25-34 AND SIGNIFICANTLY LESS VISITORS IN THE 55-64 AGE BRACKET.

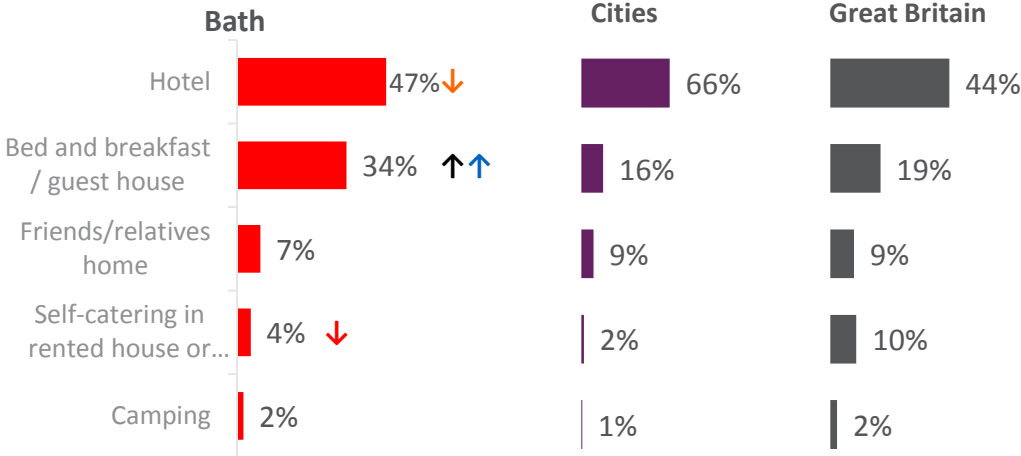
Base: Bath reduced destination list n=701 Bath last 3 years reduced destination list n=216
City destination n= 4115 total base n=12771

Significant differences will be indicated by a black↑/orange↓ arrow against city destinations and a blue↑/red↓ against GB

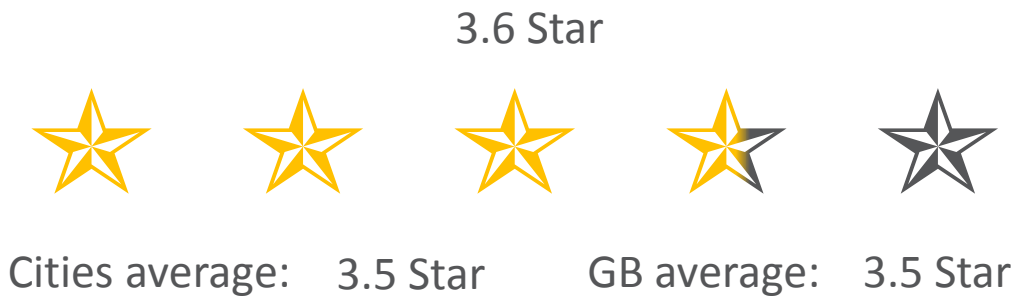


Where are they staying? – among most recent visitors

Accommodation type (Top 5)



Accommodation Quality Average (claimed)



| Accommodation Quality | Bath | Cities | Great Britain |
|----------------------------|------|--------|---------------|
| 1 star | 1% | 1% | 1% |
| 2 star | 4% | 6% | 6% |
| 3 star | 31% | 36% | 36% |
| 4 star | 38% | 36% | 33% |
| 5 star | 10% | 8% | 7% |
| Don't know/ Can't Remember | 16% | 13% | 17% |



HOTEL USE IS RELATIVELY LESS POPULAR IN BATH WITH MANY VISITORS OPTING INSTEAD FOR A BED AND BREAKFAST. VISITORS WHO STAY IN BATH ARE MORE LIKELY TO CLAIM TO STAY IN 4 AND 5 STAR ACCOMMODATION THAN IN OTHER DESTINATIONS.

Consideration, satisfaction & intention to visit

| Loyalty Ladder | Bath destination average | Cities destination average* | Great Britain destination average* |
|--|---------------------------------|------------------------------------|---|
| Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years) | 17% | 17% | 17% |
| Considerers (I have been/never been to this destination before but would like to in the future) | 57% | 49% | 48% |
| Rejecters (I have been/never been to this destination before and am not likely to do so in the future) | 21% | 24% | 26% |
| Satisfaction | 48% | 46% | 48% |
| Likelihood to revisit | 8.2 | 8.6 | 8.4 |
| Base n= | 701/151 | 4115 | 12179 |

LOYALTY TO BATH IS CONSISTENT WITH THE GB AVERAGE BUT BATH HAS A HIGHER LEVEL OF CONSIDERATION THAN OTHER DESTINATIONS. ACCORDINGLY, ONLY A COMPARATIVELY SMALLER NUMBER OF DOMESTIC HOLIDAY MAKERS REJECT BATH. LEVELS OF SATISFACTION OF THE CITY ARE IN LINE WITH THE NATIONAL AVERAGE BUT LIKELIHOOD TO REVISIT IS SLIGHTLY LOWER.

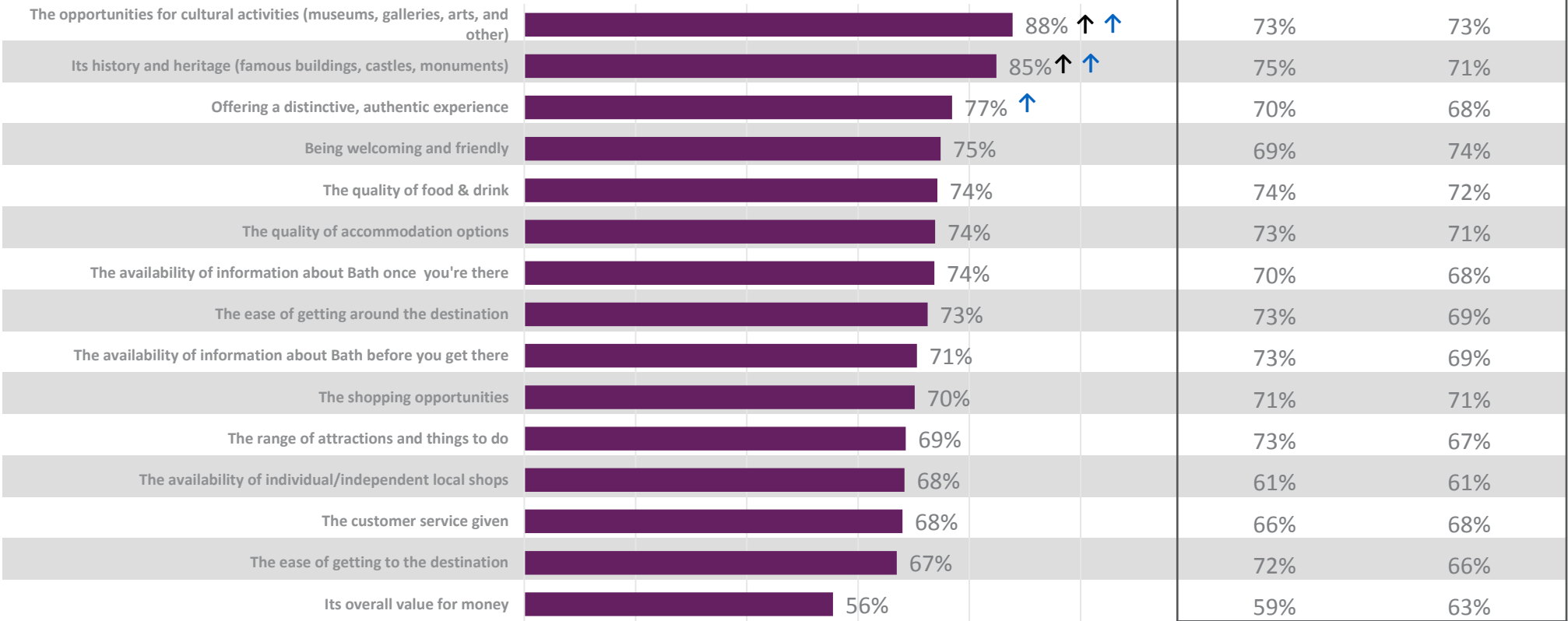
Base: In table Asked of all Bath shown on rotation from reduced destination list / Most recently visited destination

Question name: In tables

* Averages taken manually from summing each destination, not via nett.

Destination attribute satisfaction – among visitors to Bath

Destination attributes difference analysis



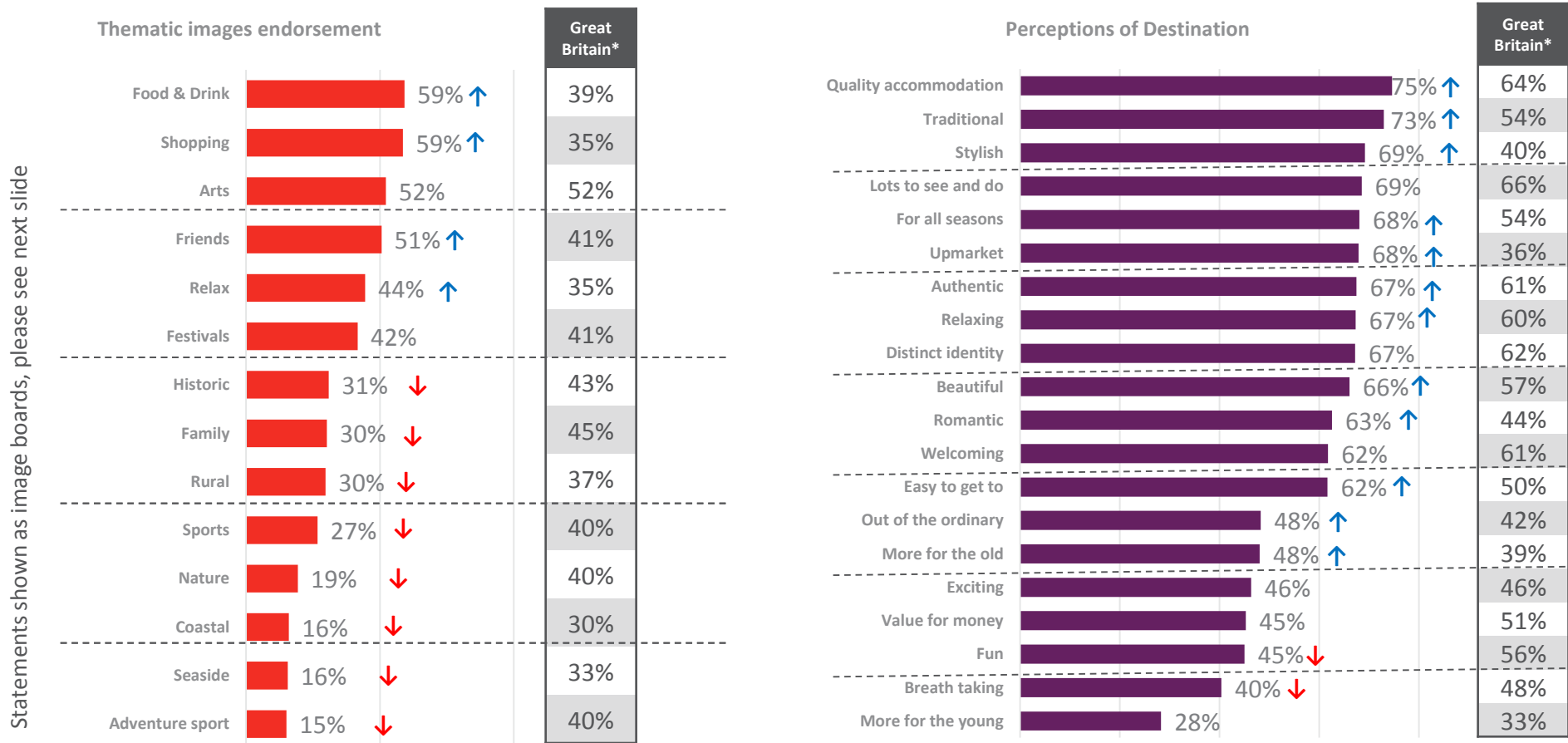
COMPARED WITH OTHER CITIES, SIGNIFICANTLY MORE VISITORS RECOGNISE BATH FOR THE CULTURAL ACTIVITIES AND HISTORY AND HERITAGE OF THE DESTINATION. IN TURN, VISITORS PERCEIVE BATH TO OFFER A DISTINCTIVE AND AUTHENTIC EXPERIENCE. HOWEVER, RELATIVELY FEW CONSIDER BATH TO OFFER GOOD VALUE FOR MONEY.

Base: Bath n=151, Cities =4115 total n=12179
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB

Destination attribute perception - among GB holiday makers

These questions ask how destinations are perceived generally, not how each was rated on a recent trip. The question is asked of visitors and non-visitors.



AMONG GB HOLIDAY MAKERS, BATH IS VIEWED AS A TRADITIONAL AND STYLISH DESTINATION. BATH HAS A LOT OF STRENGTHS, OVER-INDEXING ON NEARLY HALF OF THE PERCEPTIVE STATEMENTS TESTED, WHEN COMPARED TO OTHER GB DESTINATIONS. BATH IS, HOWEVER, SEEN AS LESS 'FUN' AND 'BREATH TAKING'.

Base: Bath n=279, Total n=12179
Question name: C90 Destination attributes

* Averages taken manually from summing each destination, not via nett.

The theme boards

Image boards (E30/35)

Shopping



Friends



Seaside



Food & drink



Rural



Festivals



Relax



Family



Nature



Coastal



Historic



Arts



Adventure



Sports



Word associations (E40/45)

- Beautiful
- Breath-taking
- Distinct culture
- Traditional
- Authentic
- Relaxing
- Quality accommodation
- Fun
- Friendly
- Romantic
- Surprising
- Exciting
- Out of the ordinary
- Value for money
- For all seasons
- Stylish
- More for the old
- Easy to get to
- Upmarket
- More for the young

Summary: Bath

- Around half of GB domestic travellers have visited Bath.
- The demographic profile of visitors to Bath is characterised by a skew toward females and younger visitors. The proportion of 25-35 years old visitors is significantly higher than the national average, meanwhile the proportion of visitors who fall in the 55-64 age group is significantly lower.
- More people consider visiting Bath than other destinations across GB and relatively few domestic holiday makers reject the destination. Whilst satisfaction scores are on a par, intention to revisit is lower than the GB average.
- High consideration levels are supported by strong positive perceptions of Bath. The destination over-indexes against GB destinations for nearly half of all perceptive statements tested.
 - Visitors see Bath as having a significantly stronger offering than other cities for providing cultural activities and history and heritage.
- Relative weakness for Bath include appearing fun, breath-taking or good value for money.
- **A watch out:** Bath has a lot of perceptual and experiential strengths, but as of yet these have not translated the high consideration levels into higher loyalty.