Birmingham destination report

VisitEngland Destination tracker:

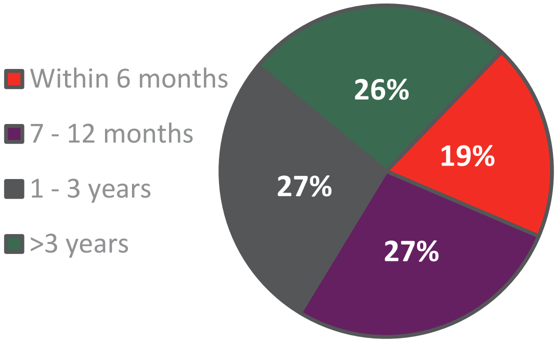
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience 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 Birmingham :

45%

Time since last visit



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

Visited destination in the last 3 years

Gender	Birmingham	Cities	Great Britain
Male	46%	51%	49%
Female	54%	49%	51%

Age	Birmingham	Cities	Great Britain
18-24	18%	16%	14%
25-34	23%↑	18%	16%
35-44	20%	17%	17%
45-54	15%	18%	18%
55-64	14%	15%	15%
65+	11%↓	16%	20%

Region of origin	Birmingham	Cities	Great Britain
Wales	7%	5%	5%
Scotland	4%↓↓	10%	9%
North East	3%	5%	4%
North West	13%	12%	11%
Yorkshire/ Humberside	7%	8%	9%
East Midlands	7%	7%	7%
West Midlands	8%	8%	9%
East Anglia / East of England	9%	10%	10%
Greater London	20%↑↑	13%	13%
South East	13%	12%	14%
South West	7%	9%	9%

SLIGHTLY FEWER THAN HALF OF THE DOMESTIC HOLIDAY MAKERS IN GB HAVE TAKEN A TRIP TO BIRMINGHAM. CITIES TEND TO ATTRACT A YOUNGER DEMOGRAPHIC THAN OTHER GB DESTINATIONS, BIRMINGHAM EXEMPLIFIES THIS WITH SIGNIFICANTLY MORE 25-34 YEAR OLDS AND SIGNIFICANTLY FEWER 65+ YEAR OLDS VISITING THE CITY THAN ELSEWHERE IN GB.

Base: Birmingham reduced destination list n=706 Birmingham last 3 years reduced destination list n=207 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

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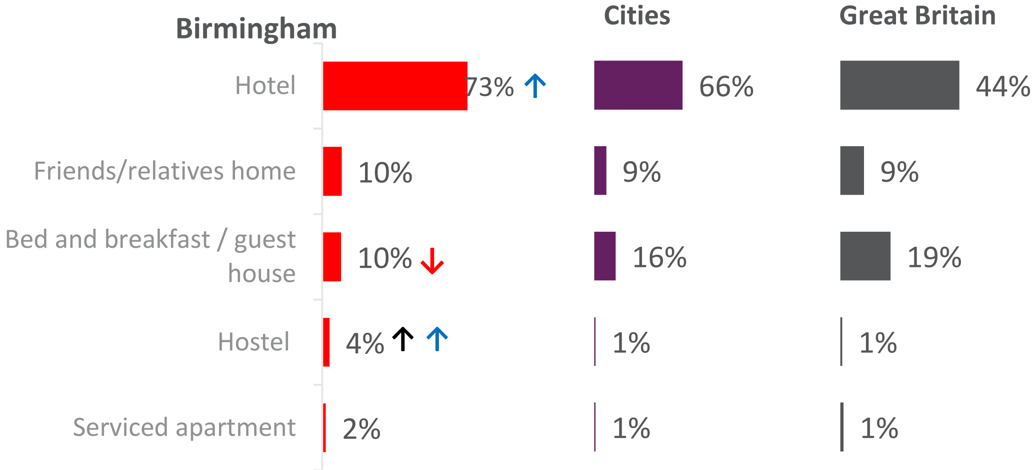
Where are they staying? – among most recent visitors

Accommodation type (Top 5)



Accommodation Quality Average (claimed)

3.5 Star

Cities average: 3.5 Star

GB average: 3.5 Star

Accommodation Quality	Birmingham	Cities	Great Britain
1 star	2%	1%	1%
2 star	5%	6%	6%
3 star	39%	36%	36%
4 star	36%	36%	33%
5 star	9%	8%	7%
Don't know/ Can't Remember	8%↓	13%	17%

LIKE OTHER CITIES, MOST VISITORS TO BIRMINGHAM STAY IN HOTELS. UNLIKE OTHER CITIES HOWEVER, BIRMINGHAM HAS FEWER VISITORS STAYING IN A BED AND BREAKFAST AND A SIGNIFICANTLY LARGER PROPORTION OF VISITORS STAYING IN HOSTELS. (NOTE: THIS IS RELATIVE AND OVERALL HOSTEL USE IN BIRMINGHAM IS STILL LOW).

Base: Most recently visited destination n=110 City destination n= 4115 Total base n=12179
Question name: In tables

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

Consideration, satisfaction & intention to visit

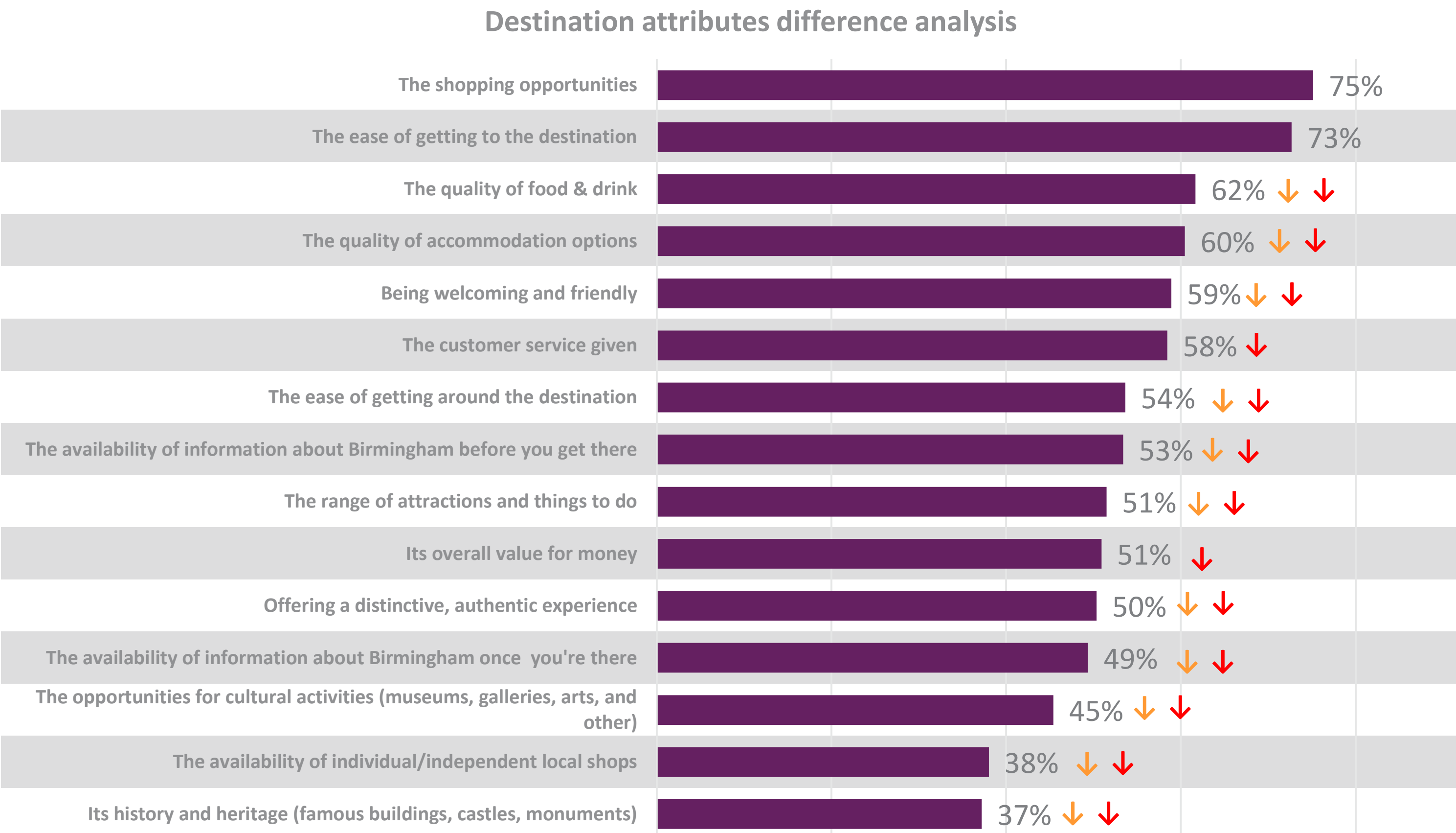
Loyalty Ladder	Birmingham destination average	Cities destination average*	Great Britain destination average*
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)	13%	17%	17%
Considerers (I have been/never been to this destination before but would like to in the future)	30%	49%	48%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)	51%	24%	26%
Satisfaction	32%	46%	48%
Likelihood to revisit	7.7	8.6	8.4
Base n=	706/110	4115	12179

BIRMINGHAM HAS A HIGH LEVEL OR REJECTION AMONG DOMESTIC HOLIDAY MAKERS, MORE THAN DOUBLE THAT OF OTHER CITIES. IN ADDITION TO THIS, AMONG VISITORS, SATISFACTION IS LOW AND LIKELIHOOD TO REVISIT IS ALSO BELOW THE NATIONAL AVERAGE.

Base: In table Asked of all Birmingham 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 Birmingham



Cities	GB
71%	71%
72%	66%
74%	72%
73%	71%
69%	74%
66%	68%
73%	69%
73%	69%
73%	67%
59%	63%
70%	68%
70%	68%
73%	73%
61%	61%
75%	71%

BIRMINGHAM OUTPERFORMS OTHER DESTINATIONS FOR SHOPPING AND TRANSPORT LINKS, BUT PERFORMS LESS WELL ACROSS OTHER ATTRIBUTES.

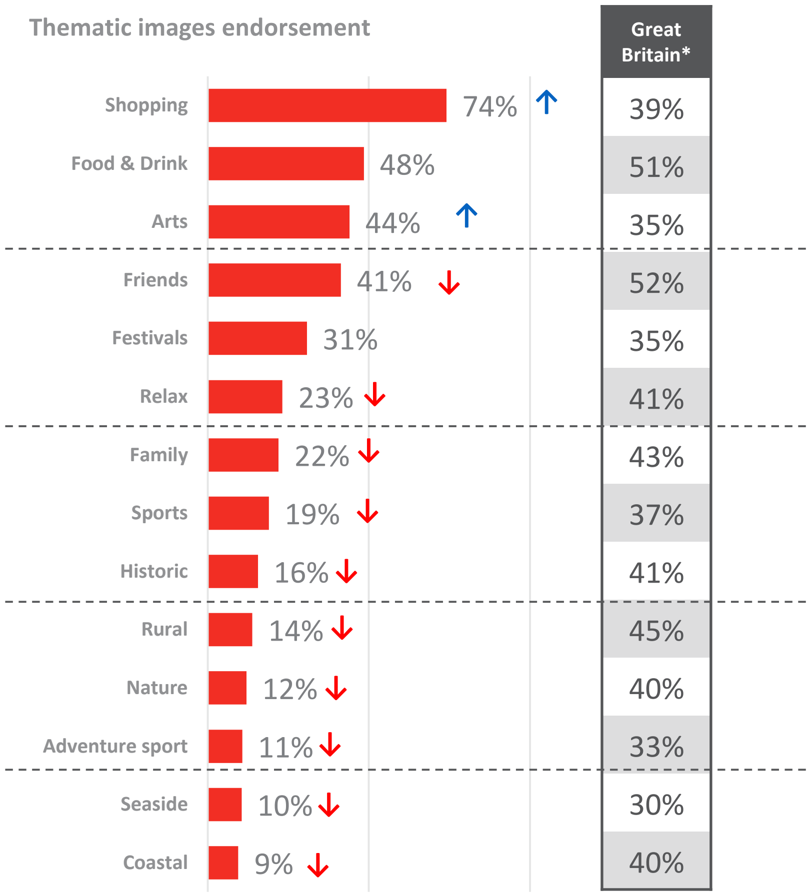
Base: Birmingham n=110, Cities =4115 total n=12179
Question name: C90 Destination attributes

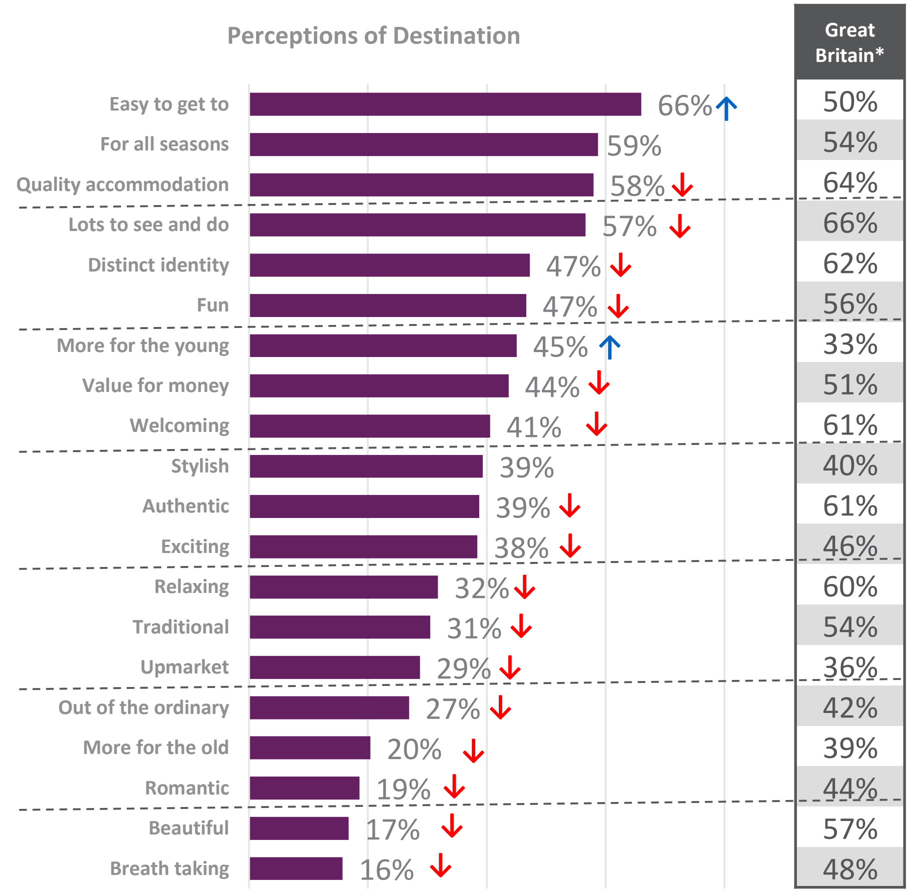
Significant differences will be indicated by a **black↑**/orange↓ arrow against city destinations and a **blue↑**/**red↓** against GB

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.

Statements shown as image boards, please see next slide





AMONG GB DOMESTIC HOLIDAY MAKERS, BIRMINGHAM IS RECOGNISED FOR SHOPPING, ARTS, AND AS AN ALL SEASON DESTINATION THAT IS MORE FOR THE YOUNG. BIRMINGHAM IS SEEN AS AN EASY PLACE TO GET TO, BUT HAS A LESS DISTINCT PROFILE ACROSS OTHER ATTRIBUTES.

Base: Birmingham n=296, Total n=12179
Question name: C90 Destination attributes
* Averages taken manually from summing each destination, not via nett.

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

The theme boards

Image boards (E30/35)

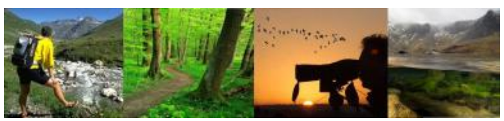
Shopping

Seaside

Rural

Relax

Nature



Historic

Adventure

Friends

Food & drink

Festivals

Family

Coastal

Arts

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: Birmingham

- Birmingham has been visited by just under half of domestic holiday makers.
- Like other cities the demographic profile skews towards the young, with 25-34 year olds making up a significantly greater proportion of visitors than in other cities.
- Similarly to other city destinations, in Birmingham, hotels are the most common accommodation option. The overall rates of satisfaction and likelihood to revisit Birmingham are fairly low. Consequently, the level of rejection among domestic holiday makers is much higher than in other destinations.
- Visitors recognise Birmingham for its shopping and transport connectivity.
- Birmingham has perceptual strengths across arts, as well as being more for the young.
- **A watch out:** Birmingham's performance across other satisfaction and perception attributes is less strong than the GB average and this is likely to be impacting the overall consideration/likelihood to revisit score.