



# Bristol destination report



# VisitEngland Destination tracker:

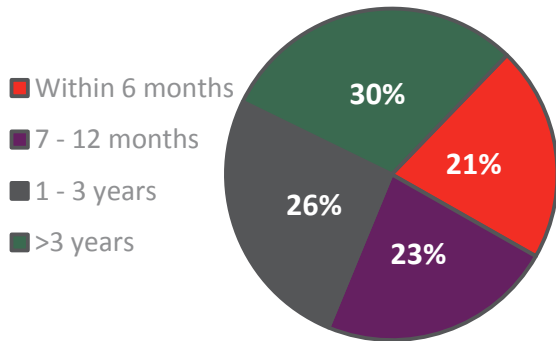
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience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

44%

## 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 | Bristol | Cities | Great Britain |
|--------|---------|--------|---------------|
| Male   | 50%     | 51%    | 49%           |
| Female | 50%     | 49%    | 51%           |

| Age   | Bristol | Cities | Great Britain |
|-------|---------|--------|---------------|
| 18-24 | 20%↑    | 16%    | 14%           |
| 25-34 | 24%↑↑   | 18%    | 16%           |
| 35-44 | 18%     | 17%    | 17%           |
| 45-54 | 13%     | 18%    | 18%           |
| 55-64 | 10%     | 15%    | 15%           |
| 65+   | 14%↓    | 16%    | 20%           |

| Region of origin              | Bristol | Cities | Great Britain |
|-------------------------------|---------|--------|---------------|
| Wales                         | 6%      | 5%     | 5%            |
| Scotland                      | 5%↓     | 10%    | 9%            |
| North East                    | 1%↓↓    | 5%     | 4%            |
| North West                    | 10%     | 12%    | 11%           |
| Yorkshire/ Humberside         | 5%      | 8%     | 9%            |
| East Midlands                 | 8%      | 7%     | 7%            |
| West Midlands                 | 9%      | 8%     | 9%            |
| East Anglia / East of England | 6%      | 10%    | 10%           |
| Greater London                | 23%↑↑   | 13%    | 13%           |
| South East                    | 16%     | 12%    | 14%           |
| South West                    | 12%     | 9%     | 9%            |

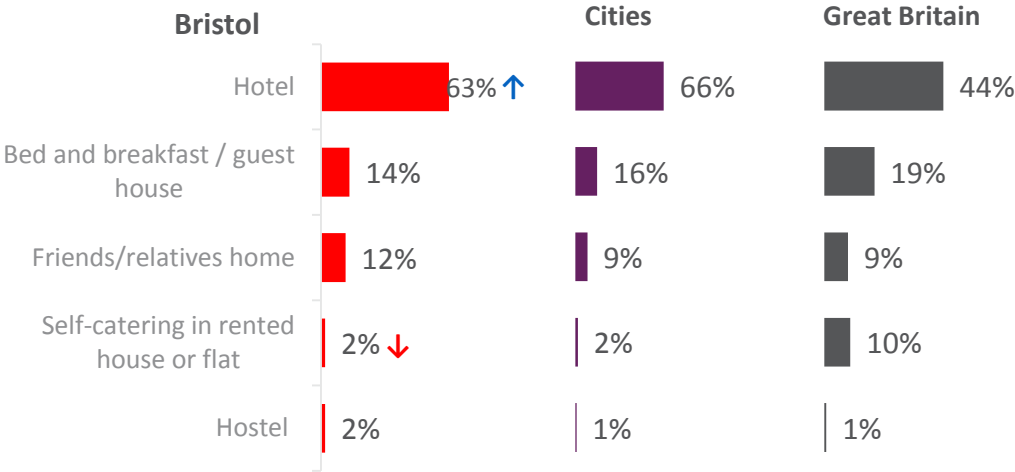
THE DEMOGRAPHIC PROFILE OF THE BRISTOL VISITOR IS YOUNGER THAN OTHER CITIES AND THE REST OF GREAT BRITAIN, ESPECIALLY AMONG THOSE YOUNGER THAN 35 YEARS OLD. THERE IS A CLEAR CATCHMENT AREA FOR BRISTOL: LONDON AND THE SOUTH. HOWEVER, MOST OVER AND UNDER INDEXING FOR REGIONAL VISITATION IS MERELY A REFLECTION OF THE DIFFERENT GEOGRAPHIES OF AN INDIVIDUAL DESTINATION VS. AN AVERAGE OF DESTINATIONS.

Base: Bristol reduced destination list n=275 Bristol last 3 years reduced destination list n=195 City destination n= 4115 total base n=12771

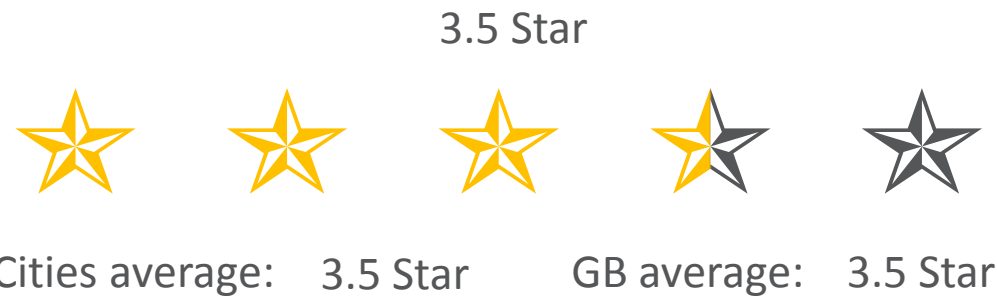
Significant differences will be indicated by a black↑/orange↓ arrow against city destinations and a blue↑/red↓ against GB

# Where are they staying? – among most recent visitors

## Accommodation type (Top 5)



## Accommodation Quality Average (claimed)



| Accommodation Quality      | Bristol | Cities | Great Britain |
|----------------------------|---------|--------|---------------|
| 1 star                     | 0%      | 1%     | 1%            |
| 2 star                     | 6%      | 6%     | 6%            |
| 3 star                     | 38%     | 36%    | 36%           |
| 4 star                     | 42% ↑   | 36%    | 33%           |
| 5 star                     | 4%      | 8%     | 7%            |
| Don't know/ Can't Remember | 10% ↓   | 13%    | 17%           |

AS WITH OTHER CITIES, HOTELS ARE BY FAR THE MOST POPULAR ACCOMMODATION, WITH SIGNIFICANTLY HIGHER LEVELS OF USE THAN OTHER DESTINATIONS IN GB. ALSO IN LINE WITH OTHER CITIES, SELF CATERING OPTIONS ARE SIGNIFICANTLY LESS USED OPTIONS.

Base: Most recently visited destination n=145 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

| <b>Loyalty Ladder</b>  | <b>Bristol destination average</b> | <b>Cities destination average*</b> | <b>Great Britain destination average*</b> |
|--|------------------------------------|------------------------------------|---|
| <b>Loyal</b><br>(I often/sometimes take holidays there and intended to in the next year/couple of years)         | <b>14%</b>                         | <b>17%</b>                         | <b>17%</b>                                |
| <b>Considerers</b><br>(I have been/never been to this destination before but would like to in the future)        | <b>46%</b>                         | <b>49%</b>                         | <b>48%</b>                                |
| <b>Rejecters</b><br>(I have been/never been to this destination before and am not likely to do so in the future) | <b>35%</b>                         | <b>24%</b>                         | <b>26%</b>                                |
| <b>Satisfaction</b>  | <b>42%</b>                         | <b>46%</b>                         | <b>48%</b>                                |
| <b>Likelihood to revisit</b>   | <b>8.0</b>                         | <b>8.6</b>                         | <b>8.4</b>                                |
| Base n=  | 145/275                            | 4115                               | 12179                                     |

**BRISTOL HAS SOME CHALLENGES WITH REGARD TO VISITATION AND LOYALTY. THE SATISFACTION SCORE FOR TRIPS TO BRISTOL ARE LOWER THAN OTHER CITIES, WHICH MAY BE HAVING AN EFFECT ON LIKELIHOOD TO REVISIT AND BOLSTER THE NUMBER OF "REJECTERS".**

Base: In table Asked of all Bristol 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 Bristol

Destination attributes difference analysis

|   |       | Cities | GB  |
|---|-------|--------|-----|
| The shopping opportunities  | 69%   | 71%    | 71% |
| The ease of getting to the destination  | 68%   | 72%    | 66% |
| The quality of food & drink   | 68%   | 74%    | 72% |
| The ease of getting around the destination                                      | 67%   | 73%    | 69% |
| The range of attractions and things to do                                       | 66%   | 73%    | 67% |
| The opportunities for cultural activities (museums, galleries, arts, and other) | 65%   | 73%    | 73% |
| The availability of information about Bristol before you get there              | 64% ↓ | 73%    | 69% |
| The quality of accommodation options  | 63% ↓ | 73%    | 71% |
| The availability of information about Bristol once you're there                 | 63%   | 70%    | 68% |
| Its history and heritage (famous buildings, castles, monuments)                 | 63%   | 75%    | 71% |
| Being welcoming and friendly  | 62% ↓ | 69%    | 74% |
| The customer service given  | 62%   | 66%    | 68% |
| Offering a distinctive, authentic experience                                    | 60% ↓ | 70%    | 68% |
| The availability of individual/independent local shops                          | 56%   | 61%    | 61% |
| Its overall value for money   | 56%   | 59%    | 63% |

**A FURTHER CHALLENGE FOR BRISTOL IS THAT IT DOES NOT LEAVE A DISTINCT IMPRESSION WHEN COMPARED TO OTHER CITIES. BRISTOL CONSISTENTLY SCORES LOWER THAN OTHER CITIES AND GB DESTINATIONS ACROSS PERCEPTUAL ATTRIBUTES.**

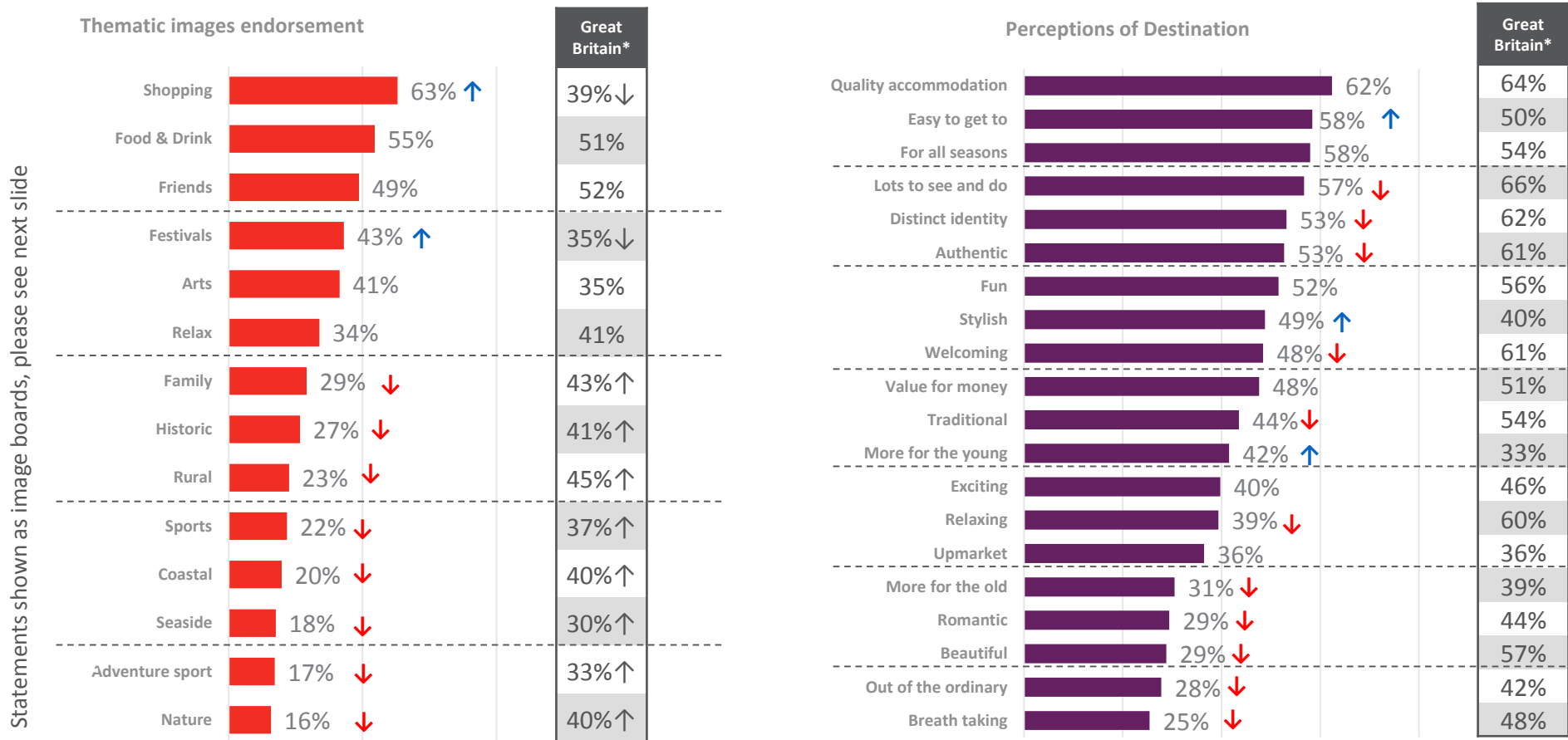
Base: Bristol n=114, Cities =4117 total n=12179  
Question name: C90 Destination attributes

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.



HOWEVER, WHEN GB HOLIDAY MAKERS ARE ASKED ABOUT HOW BRISTOL IS PERCEIVED, THE DESTINATION DOES HAVE A CLEAR IDENTITY IN TERMS OF SHOPPING AND FESTIVALS. ADDITIONALLY, BRISTOL IS SEEN AS A STYLISH CITY WITH CONVENIENT TRANSPORT LINKS.

Base: Bristol n=286, 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



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: Bristol

- Just under half of domestic travellers have visited Bristol.
- The demographic profile of visitors to Bristol is younger than other destinations in GB, with a skew towards under 35's.
- Among visitors, Bristol achieves scores comparable to but not better than other cities for experience.
- In many ways in the eyes of consumers Bristol represents a typical city break.
  - Like other cities, visitors to Bristol are more likely to stay in hotels than in the rest of the country.
- Bristol faces a challenge in terms of loyalty, trip satisfaction and likelihood to revisit, with all three marginally behind the average for cities.
- A challenge facing Bristol is to make good experiences more distinct and memorable than other cities, rather than overhauling bad experiences.
- Perceptions among domestic holiday makers in Great Britain generally is that Bristol is good for both shopping and festivals and is a stylish destination.