



# Cornwall destination report



# VisitEngland Destination tracker:

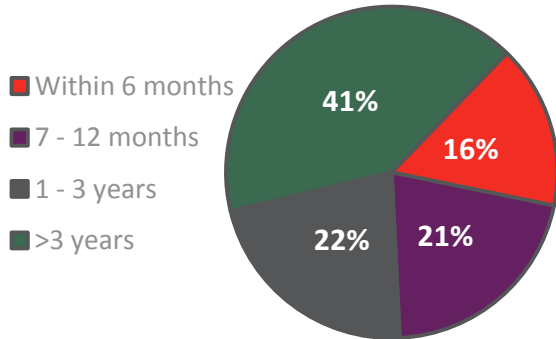
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience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

# 71%

## 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	Cornwall	Seaside	Great Britain
Male	53%	47%	49%
Female	47%	53%	51%

Age	Cornwall	Seaside	Great Britain
18-24	12%	10%	14%
25-34	18%↑	12%	16%
35-44	22%↑	19%	17%
45-54	13%↓↓	18%	18%
55-64	17%	17%	15%
65+	18%↓	24%	20%

Region of origin	Cornwall	Seaside	Great Britain
Wales	5%	6%	5%
Scotland	4%↓	5%	9%
North East	3%	3%	4%
North West	11%	11%	11%
Yorkshire/ Humberside	6%↓	10%	9%
East Midlands	8%	8%	7%
West Midlands	10%	13%	9%
East Anglia / East of England	9%	9%	10%
Greater London	17%↑↑	11%	13%
South East	13%	15%	14%
South West	14%↑↑	9%	9%

**CORNWALL HAS A HIGH LEVEL OF VISITATION ACROSS GREAT BRITAIN WITH NEARLY 3 QUARTERS OF PEOPLE VISITING AT SOME POINT. CORNWALL HAS AN INTERESTING AGE DEMOGRAPHIC: THE AGE PROFILE OVER INDEXES ON 25-44'S – PERHAPS REFLECTING ITS FAMILY DEMOGRAPHIC.**

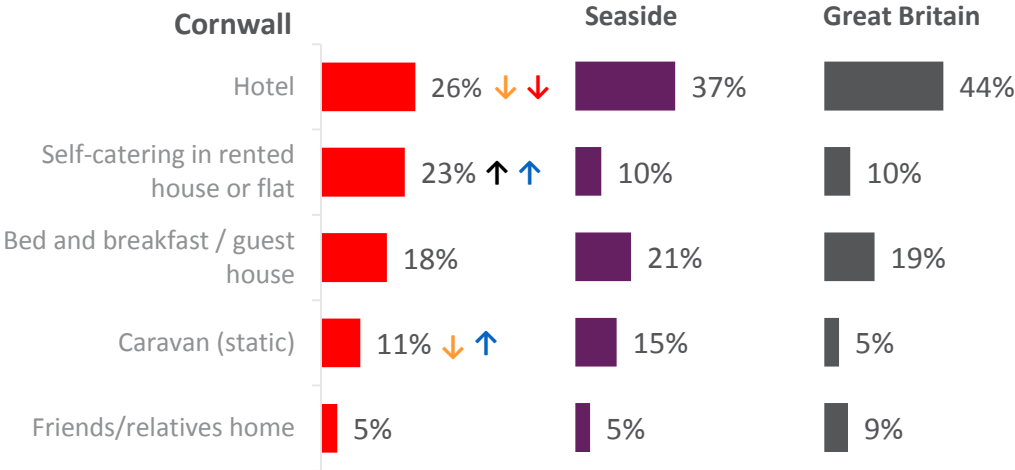
Base: Cornwall reduced destination list n=427 Cornwall last 3 years reduced destination list n=284 Seaside destination n= 1782 total base n=12771

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

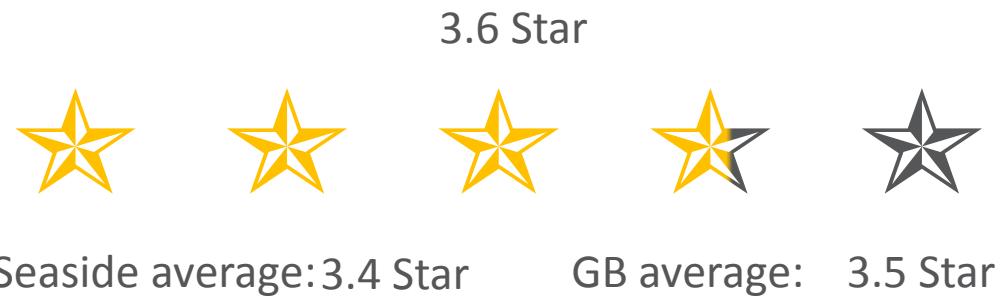


# Where are they staying? – among most recent visitors

## Accommodation type (top 5)



## Accommodation Quality Average (claimed)



Accommodation Quality	Cornwall	Seaside	Great Britain
1 star	0%	1%	1%
2 star	4% ↓ ↓	7%	6%
3 star	33% ↓	39%	36%
4 star	34% ↑	30%	33%
5 star	8%	5%	7%
Don't know/ Can't Remember	19%	18%	17%



**SEASIDE RESORTS HAVE LOWER HOTEL USE THAN GREAT BRITAIN GENERALLY BUT CORNWALL HAS LOWER HOTEL USE STILL. WHEN VISITING CORNWALL HOLIDAY MAKERS ARE MORE LIKELY TO OPT FOR SELF-CATERING IN A RENTED HOUSE THAN THEY WOULD BE WHEN VISITING OTHER DESTINATIONS ACROSS GB.**

# Consideration, satisfaction & intention to visit

<b>Loyalty Ladder</b>	<b>Cornwall destination average</b>	<b>Seaside destination average*</b>	<b>Great Britain destination average*</b>
<b>Loyal</b> (I often/sometimes take holidays there and intended to in the next year/couple of years)	<b>31%</b>	<b>14%</b>	<b>17%</b>
<b>Considerers</b> (I have been/never been to this destination before but would like to in the future)	<b>55%</b>	<b>48%</b>	<b>48%</b>
<b>Rejecters</b> (I have been/never been to this destination before and am not likely to do so in the future)	<b>12%</b>	<b>28%</b>	<b>26%</b>
<b>Satisfaction</b>	<b>55%</b>	<b>50%</b>	<b>48%</b>
<b>Likelihood to revisit (C88)</b>	<b>8.8</b>	<b>8.6</b>	<b>8.4</b>
Base n=	427/517	1782	12179

**CORNWALL HAS VERY HIGH LEVELS OF LOYALTY COMPARED TO OTHER SEASIDE DESTINATIONS AND GREAT BRITAIN GENERALLY. SATISFACTION LEVELS ARE HIGHER THAN THE NATIONAL AVERAGE, AS IS THE LIKELIHOOD TO REVISIT.**

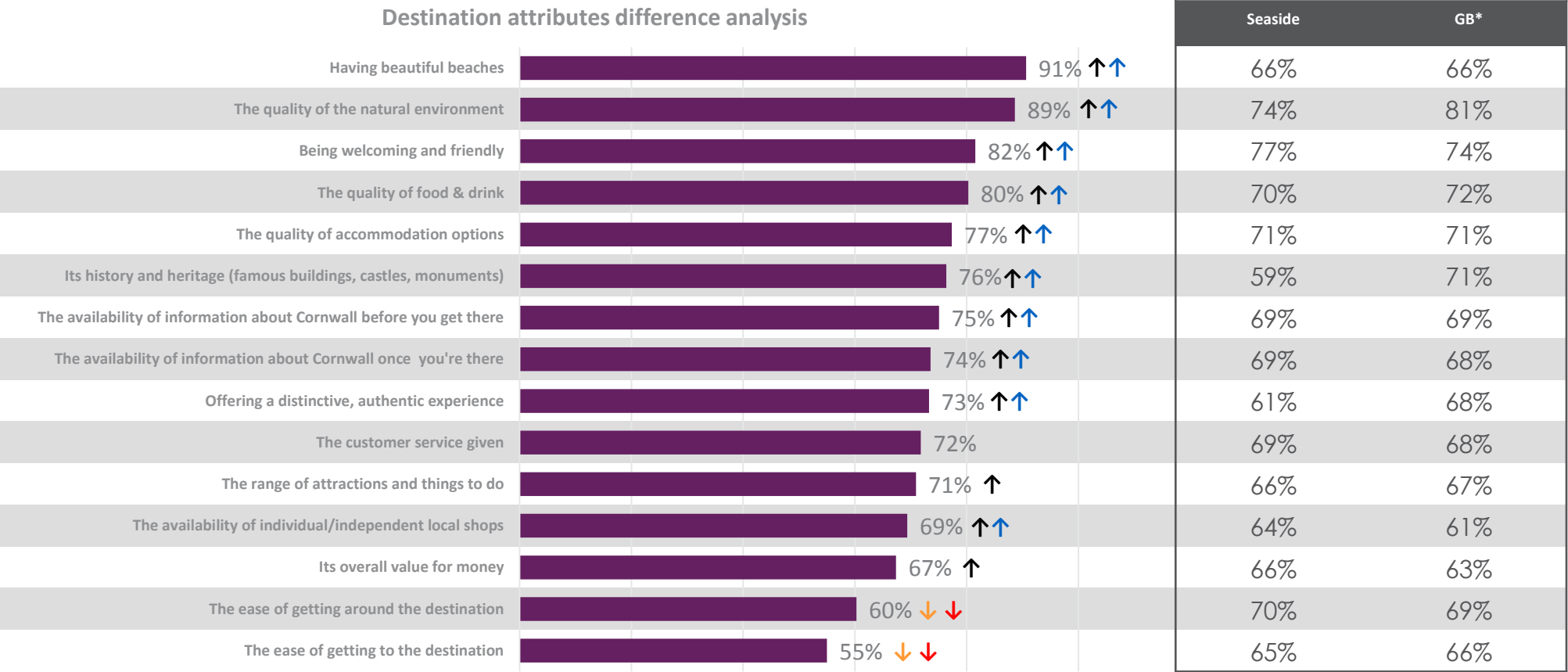
Base: In table Asked of all Cornwall shown on rotation from reduced destination list / Most recently visited destination

Question name: In tables

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

# Destination attribute satisfaction – among visitors to Cornwall

Destination attributes difference analysis



**CORNWALL TICKS ALL THE BOXES FOR A LOT OF VISITORS. THE NOTABLE STAND OUTS ARE THE BEAUTIFUL BEACHES AND QUALITY OF THE NATURAL ENVIRONMENT, WHICH ARE AMONG THE HIGHEST SCORES ACROSS GB DESTINATIONS.**

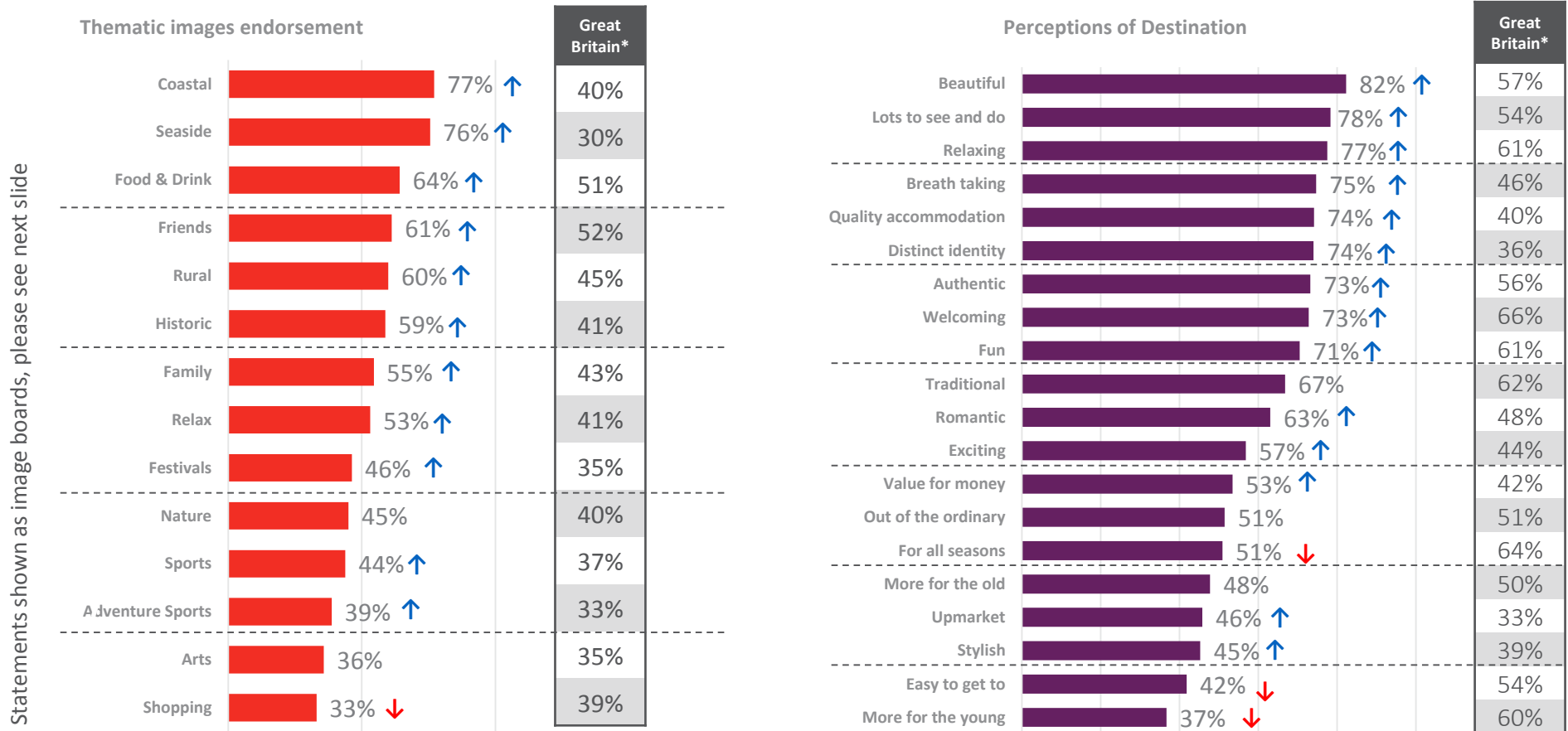
Base: Cornwall n=517, Seaside =1782 total n=12179  
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against seaside resorts 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.



MAGNIFICENT SHORELINES ARE INSEPARABLE FROM CORNWALL IN THE EYES OF THE DOMESTIC HOLIDAY MAKER AND THE DESTINATION OUTSHINES THE REST OF GB SIGNIFICANTLY IN THIS AREA. HOWEVER, HOLIDAY MAKERS BELIEVE THAT CORNWALL ALSO HAS MORE TO OFFER INCLUDING FOOD AND DRINK, HISTORY AND QUALITY ACCOMMODATION.

Base: Cornwall n=362, Total n=12179  
Question name: C90 Destination attributes

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



\* 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: Cornwall

- Cornwall is a very popular destination among domestic travellers, of those visited 59% have done so in the last 3 years but relatively few have done so in the last 6 months (16%).
- However, Cornwall also has a high loyalty and likelihood to revisit when compared to the rest of GB.
- Holiday makers in Cornwall are far more likely to stay in self catered rented accommodation than their counterparts across GB.
  - In Cornwall use of self catered rented accommodation is nearly as high as traditional hotels.
- Across GB Cornwall is known for its coast lines, beaches and natural environment-outperforming GB average comfortably.
- Visitors confirm these perceptions endorsing the “beautiful beaches” and “Quality of the natural environment”.
- **A watch out:** Cornwall not seen as easy to get to compared to the rest of GB.