



# Cotswolds 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.

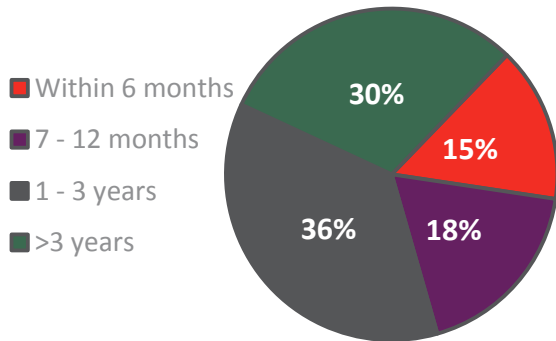


# Who is visiting?

## Ever Visited Cotswolds:

# 56%

## 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	Cotswolds	Countryside	Great Britain
Male	50%	48%	49%
Female	50%	52%	51%

Age	Cotswolds	Countryside	Great Britain
18-24	12%	12%	14%
25-34	17%	14%	16%
35-44	17%	18%	17%
45-54	18%	19%	18%
55-64	18%	14%	15%
65+	19%	23%	20%

Region of origin	Cotswolds	Countryside	Great Britain
Wales	5%	6%	5%
Scotland	4% ↓ ↓ ↓	9%	9%
North East	2% ↓	5%	4%
North West	13%	11%	11%
Yorkshire/ Humberside	6% ↓	10%	9%
East Midlands	5%	8%	7%
West Midlands	12% ↑	8%	9%
East Anglia / East of England	10%	9%	10%
Greater London	17% ↑ ↑	11%	13%
South East	17%	15%	14%
South West	9%	9%	9%

JUST OVER HALF OF GB DOMESTIC HOLIDAY MAKERS HAVE VISITED THE COTSWOLDS, THE MAJORITY OF WHOM VISITED OVER A YEAR AGO WITH A LARGE PROPORTION VISITING OVER 3 YEARS AGO. VISITORS TO THIS DESTINATION ARE MORE LIKELY TO COME FROM LONDON OR THE MIDLANDS.

Base: Cotswolds reduced destination list n=693 Cotswolds last 3 years reduced destination list n=344 Countryside destination n= 1695 Total base n=12771

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

# Where are they staying? – among most recent visitors

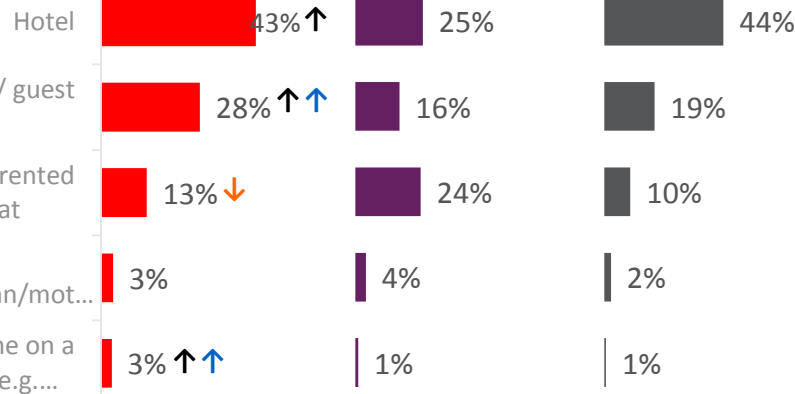
## Accommodation type (top 5)

### Cotswolds

### Countryside

### Great Britain

## Accommodation Quality Average (claimed)



3.7 Star



Countryside

3.7 Star

GB average: 3.5 Star

average:

Accommodation Quality	Cotswolds	Countryside	Great Britain
1 star	0%	1%	1%
2 star	5%	4%	6%
3 star	29%	29%	36%
4 star	42% ↑	35%	33%
5 star	14% ↑	11%	7%
Don't know/ Can't Remember	10% ↓↓	21%	17%



VISITORS TO THE COTSWOLDS ARE MORE LIKELY TO USE HOTELS THAN THOSE TO OTHER COUNTRYSIDE RESORTS; HOTEL USE IN THE COTSWOLDS IS MORE IN LINE WITH THE GB AVERAGE. VISITORS TO THE COTSWOLDS ARE ALSO MORE LIKELY TO CLAIM THEY STAYED IN 4-5 STAR ACCOMMODATION.

Base: Most recently visited destination n=139 Countryside destination n= 1695 Total base n=12179

Question name: In tables

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

# Consideration, satisfaction & intention to visit

<b>Loyalty Ladder</b>	<b>Cotswolds destination average</b>	<b>Countryside 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>20%</b>	<b>16%</b>	<b>17%</b>
<b>Considerers</b> (I have been/never been to this destination before but would like to in the future)	<b>58%</b>	<b>49%</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>16%</b>	<b>27%</b>	<b>26%</b>
<b>Satisfaction</b>	<b>52%</b>	<b>54%</b>	<b>48%</b>
<b>Likelihood to revisit (C88)</b>	<b>8.4</b>	<b>8.3</b>	<b>8.4</b>
Base n=	693/139	1695	12179

**THE COTSWOLDS HAVE VERY LOW LEVELS OF REJECTION COMPARED TO OTHER DESTINATIONS ACROSS GB. THE SATISFACTION AND LIKELIHOOD TO REVISIT AMONG VISITORS IS IN LINE WITH WHAT WE CAN EXPECT FROM A COUNTRYSIDE DESTINATION. IN COMPARISON TO THE REST OF THE COUNTRY, THE RATE OF CONSIDERERS IS CONSIDERABLY HIGHER.**

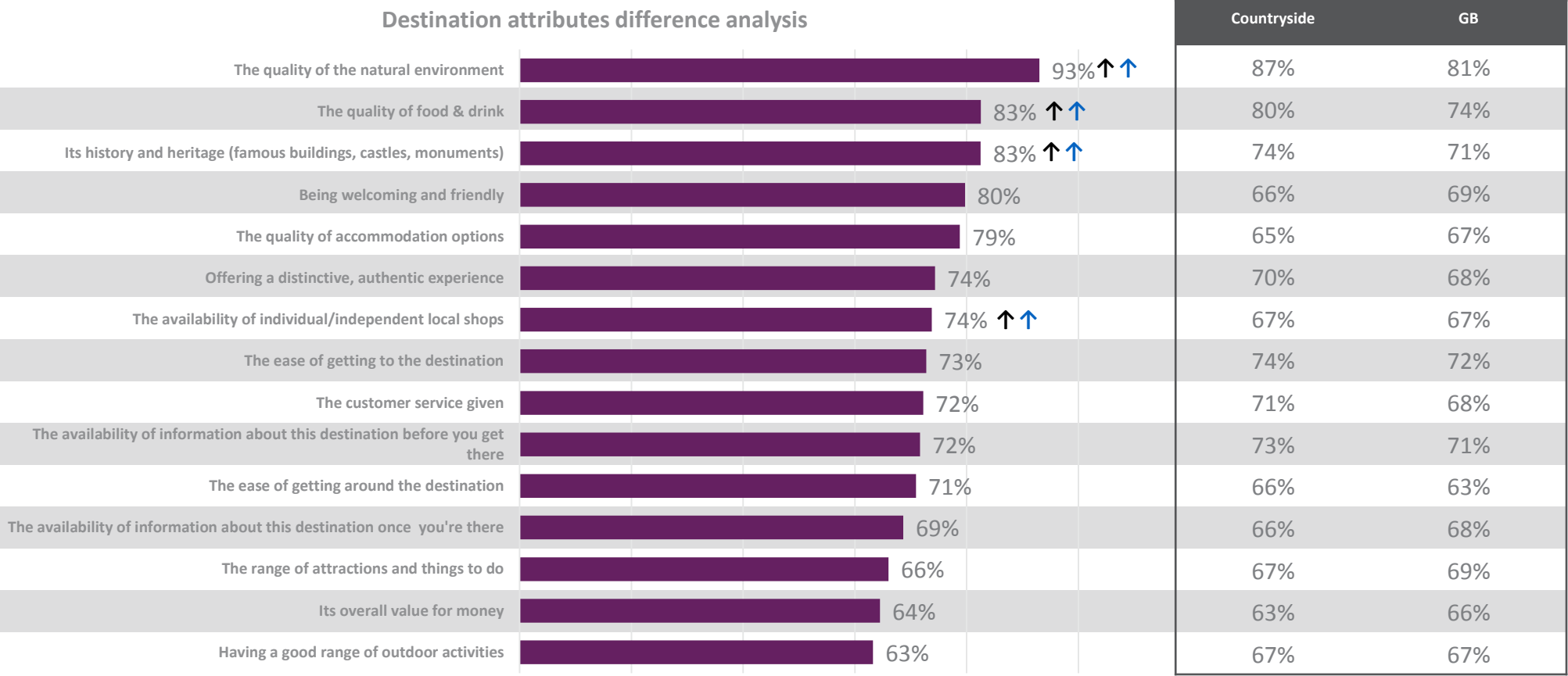
Base: In table Asked of all Cotswolds shown on rotation from reduced destination list / Most recently visited destination

Question name: In tables

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

# Destination attribute satisfaction – among visitors to the Cotswolds

Destination attributes difference analysis



VISITORS SCORE THE COTSWOLDS HIGHER THAN OTHER COUNTRYSIDE DESTINATIONS FOR QUALITY OF NATURAL ENVIRONMENT, THE QUALITY OF FOOD AND DRINK, ITS HISTORY AND HERITAGE, AND THE AVAILABILITY OF INDEPENDENT LOCAL SHOPS. IT HAS NO NOTABLE DEFICIENCIES AGAINST OTHER DESTINATIONS OF ITS TYPE.

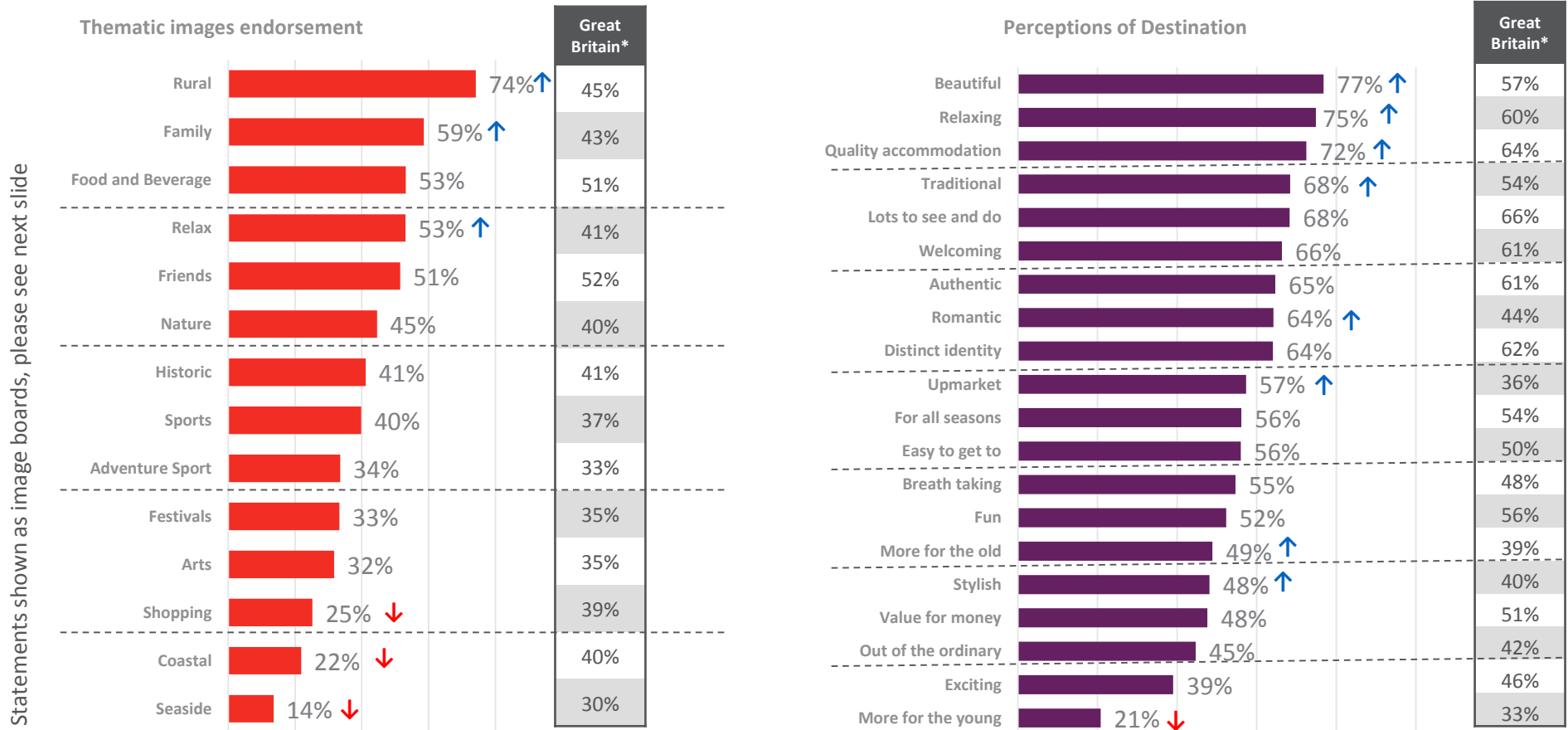
Base: Cotswolds n=162, Countryside =1695 Total n=12179  
Question name: C90 Destination attributes

Significant differences will be indicated by a black↑/orange↓ arrow against countryside 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 DOMESTIC TOURISTS ACROSS GB THE COTSWOLDS IS SEEN AS A BEAUTIFUL AND RELAXING RURAL DESTINATION FOR THE FAMILY. THE QUALITY OF ACCOMMODATION IS ALSO A STAND OUT- AS A DESTINATION, IT IS VIEWED AS BEING MORE FOR THE OLD AND LESS FOR THE YOUNG.

Base: Cotswolds n=308 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



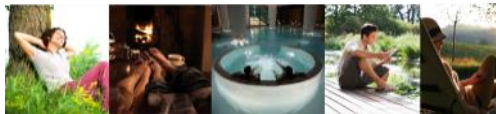
Rural



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: Cotswolds

- Just over half of domestic holiday makers have taken a trip to the Cotswolds.
- The destination particularly attracts visitors from the West Midlands and London.
- Despite being a countryside destination, the accommodation choices made by visitors to the Cotswolds is more in line with GB generally.
  - Many visitors opt for hotels, and often these are thought to have a higher star rating than elsewhere in the country.
  - Among the domestic holiday maker market generally, the Cotswolds is recognised as having good quality accommodation.
- The Cotswolds has levels of satisfaction comparable to other countryside destinations, but enjoys a very low level of rejecters.
- This destination is perceived more positively than other countryside destinations, over indexing for quality of environment, food and drink and also history and heritage. There is no perceptive statement among visitors that is significantly lower than other countryside destinations.
- **A watch out:** Among the broader domestic holiday maker, the Cotswolds could be considered a destination for older visitors, scoring significantly lower than the rest of GB on the “for the young” statement.