



New Forest destination report



VisitEngland Destination tracker:

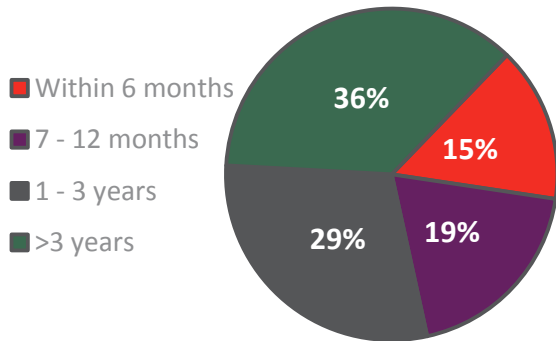
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience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

51%

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	The New Forest	Countryside	Great Britain
Male	55%	48%	49%
Female	45%	52%	51%

Age	The New Forest	Countryside	Great Britain
18-24	15%	12%	14%
25-34	22%↑↑	14%	16%
35-44	17%	18%	17%
45-54	13%↓	19%	18%
55-64	16%	14%	15%
65+	17%	23%	20%

Region of origin	The New Forest	Countryside	Great Britain
Wales	6%	6%	5%
Scotland	5%	9%	9%
North East	3%	5%	4%
North West	6%↓↓	11%	11%
Yorkshire/ Humberside	7%	10%	9%
East Midlands	7%	8%	7%
West Midlands	6%	8%	9%
East Anglia / East of England	8%	9%	10%
Greater London	21%↑↑	11%	13%
South East	20%↑	15%	14%
South West	10%	9%	9%

1 IN 2 DOMESTIC HOLIDAY MAKERS HAVE VISITED THE NEW FOREST. THERE IS A DEMOGRAPHIC SKEW AMONG VISITORS TO THE NEW FOREST TOWARD 25-34 YEAR OLDS. A SIGNIFICANTLY HIGHER PROPORTION OF VISITORS COME FROM THE SE AND GREATER LONDON WHEN COMPARED TO OTHER DESTINATIONS.

Base: The New Forest reduced destination list n=674 The New Forest last 3 years reduced destination list n=193 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

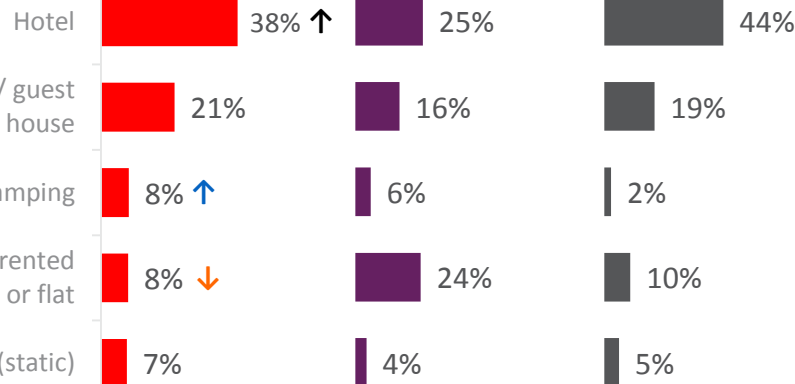
Accommodation type (Top 5)

The New Forest

Countryside

Great Britain

Accommodation Quality Average (claimed)



3.6 Star



Countryside 3.7 Star GB average: 3.5 Star average:

Accommodation Quality	The New Forest	Countryside	Great Britain
1 star	0%	1%	1%
2 star	4%	4%	6%
3 star	38%	29%	36%
4 star	39%	35%	33%
5 star	7%	11%	7%
Don't know/ Can't Remember	12%	21%	17%



SELF-CATERED HOUSES AND FLATS ARE SIGNIFICANTLY LESS COMMON CHOICES FOR VISITORS TO THE NEW FOREST, WHEN COMPARED TO OTHER COUNTRYSIDE DESTINATIONS. VISITORS ARE MORE LIKELY TO OPT FOR HOTELS, BED AND BREAKFAST OR TO GO CAMPING INSTEAD.

Base: Most recently visited destination n=105 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

Loyalty Ladder	The New Forest destination average	Countryside destination average*	Great Britain destination average*
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)	16%	16%	17%
Considerers (I have been/never been to this destination before but would like to in the future)	60%	49%	48%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)	18%	27%	26%
Satisfaction	60%	54%	48%
Likelihood to revisit (C88)	8.5	8.3	8.4
Base n=	674/105	1695	12179

CONSIDERATION LEVELS FOR THE NEW FOREST ARE CONSIDERABLY HIGHER THAN OTHER COUNTRYSIDE DESTINATIONS. AMONG VISITORS, SATISFACTION WITH VISITS TO THIS DESTINATION AND LIKELIHOOD TO REVISIT IS HIGHER THAN COUNTRYSIDE AND OTHER GB DESTINATIONS.

Base: In table Asked of all The New Forest 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 New Forest

Destination attributes		Countryside	GB
The quality of the natural environment	90% ↑	87%	81%
Being welcoming and friendly	82% ↑	80%	74%
The ease of getting around the destination	78% ↑↑	66%	69%
The quality of accommodation options	77%	74%	71%
Offering a distinctive, authentic experience	75%	71%	68%
Having a good range of outdoor activities	74%	67%	67%
The customer service given	73%	70%	68%
The availability of information about the...	72%	67%	69%
The quality of food & drink	72%	74%	72%
The availability of information about the...	70%	66%	68%
Its history and heritage (famous buildings,...	69%	73%	71%
The ease of getting to the destination	68%	63%	66%
The range of attractions and things to do	68%	65%	67%
The availability of individual/independent local...	66%	57%	61%
Its overall value for money	65%	66%	63%

AMONG VISITORS, THE NEW FOREST IS SEEN AS A WELCOMING AND FRIENDLY DESTINATION WITH A HIGH QUALITY NATURAL ENVIRONMENT. COMPARED TO OTHER COUNTRYSIDE DESTINATIONS THE NEW FOREST SCORES CONSISTENTLY ABOVE AVERAGE AND HAS A SIGNIFICANTLY HIGHER SCORE FOR BEING EASIER TO GET AROUND.

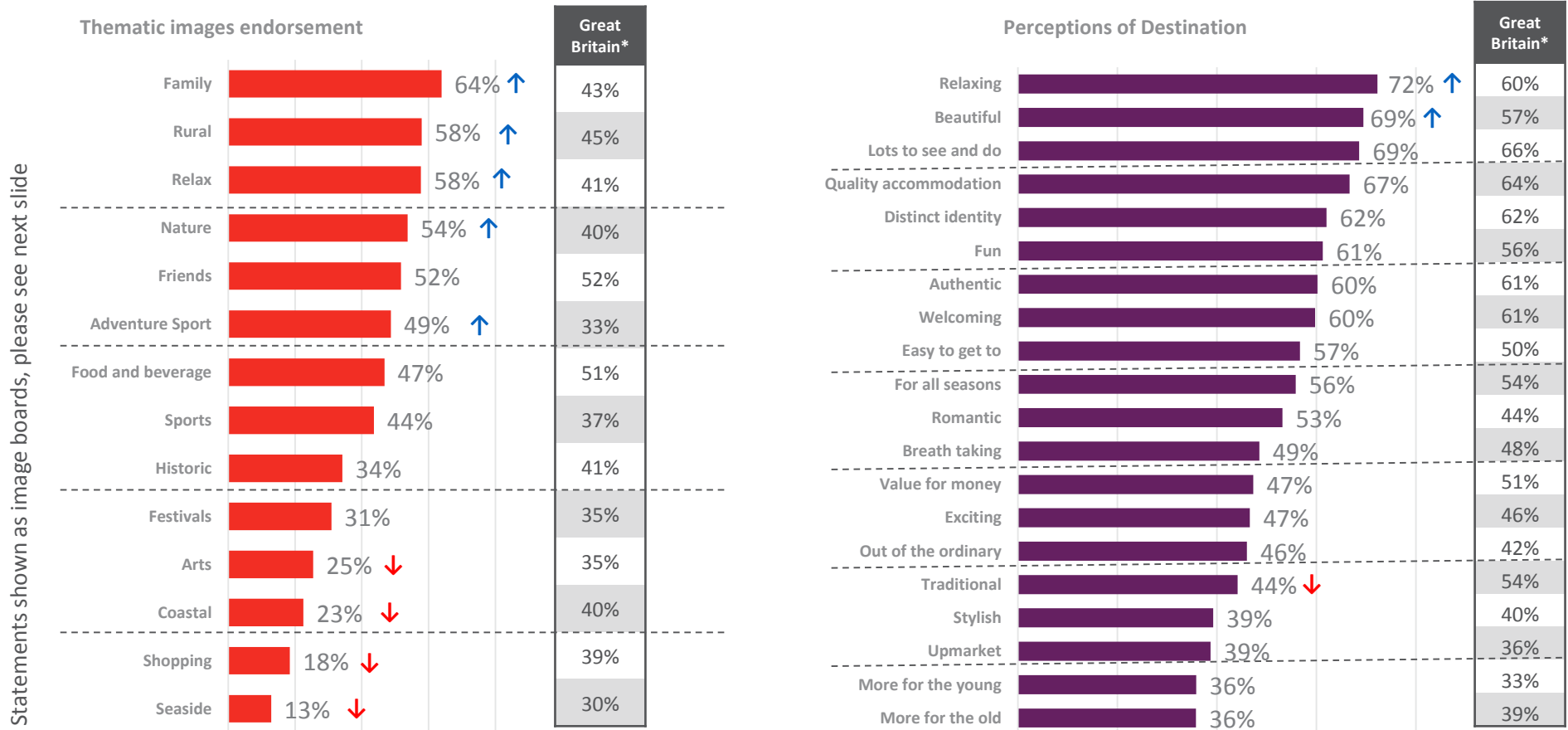
Base: The New Forest n=105, Countryside=1695 Total n=12179
 Question name: C90 Destination attributes

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.



THE NEW FOREST IS PERCEIVED AMONG DOMESTIC HOLIDAY MAKERS AS A RELAXING, BEAUTIFUL, FAMILY DESTINATION. THE NEW FOREST IS SEEN AS LESS TRADITIONAL THAN OTHER PARTS OF GB.

Base: The New Forest n=269, 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



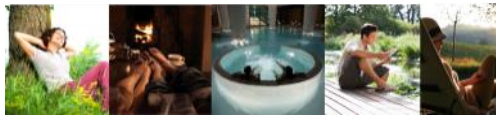
Seaside



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: New Forest

- Over half of domestic holiday makers have taken a trip to the New Forest. However, only 1 in 4 visitors have done so within the last 12 months.
- There is a skew in visitors to the New Forest toward 25-34 year olds. When compared to other countryside and GB destinations we find that the New Forest has a significantly higher proportion of this group.
- The most common accommodation choice for visitors to the New Forest is a hotel, with significantly more visitors opting for one than in other countryside destinations.
 - Self catered accommodation is used significantly less often in the New Forest than other countryside destinations, while bed and breakfasts are used more.
 - Camping is significantly more common in the New Forest than other countryside destinations.
- Consideration of the New Forest is considerably higher than other destinations in GB. Loyalty to the destination is on a par with other destinations which equates to low levels of rejection.
- The New Forest is rated above average for most perceptive traits.
- For domestic holiday makers more generally the New Forest appears to be, relaxing, beautiful and for the family.