Wiltshire destination report

[Image of a hillside with a white horse figure cut into the grass]

kubi kalloo

VisitEngland
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 Wiltshire:

44%

Time since last visit

- 38% Within 6 months
- 22% 7 - 12 months
- 28% 1 - 3 years
- 12% >3 years

Region of origin | Wiltshire | Countryside | Great Britain
--- | --- | --- | ---
Wales | 7% | 6% | 5%
Scotland | 3%↓ | 9% | 9%
North East | 1%↓ | 5% | 4%
North West | 10% | 11% | 11%
Yorkshire/Humberside | 3%↓ | 10% | 9%
East Midlands | 6% | 8% | 7%
West Midlands | 9% | 8% | 9%
East Anglia/East of England | 12% | 9% | 10%
Greater London | 15% | 11% | 13%
South East | 16% | 15% | 14%
South West | 17%↑ | 9% | 9%

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

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

JUST UNDER HALF OF DOMESTIC HOLIDAY MAKERS HAVE VISITED WILTSHIRE. THE AGE AND GENDER PROFILE OF VISITORS TO WILTSHIRE MATCHES THE PROFILE OF DOMESTIC HOLIDAY MAKERS GENERALLY, BUT THE DESTINATION DOES DRAW A SIGNIFICANTLY HIGHER PROPORTION OF VISITORS FROM THE SOUTH WEST.

Base: Wiltshire reduced destination list n=700 Wiltshire last 3 years reduced destination list n=143 Countryside destination n=1695 Total base n=12771
### Where are they staying? – among most recent visitors

#### Accommodation type (top 5)

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Wiltshire</th>
<th>Countryside</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>42%↑</td>
<td>25%</td>
<td>44%</td>
</tr>
<tr>
<td>Bed and breakfast / guest house</td>
<td>20%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>Friends/relatives home</td>
<td>10%↑</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Holiday camp / village</td>
<td>8%↑</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Self-catering in rented house or flat</td>
<td>6%</td>
<td>24%</td>
<td>10%</td>
</tr>
</tbody>
</table>

#### Accommodation Quality Average (claimed)

- **Countryside average:** 3.7 Star
- **GB average:** 3.5 Star
- **Wiltshire average:** 3.4 Star

#### Accommodation Quality

<table>
<thead>
<tr>
<th>Accommodation Quality</th>
<th>Wiltshire</th>
<th>Countryside</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 star</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>2 star</td>
<td>4%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>3 star</td>
<td>41%↑</td>
<td>29%</td>
<td>36%</td>
</tr>
<tr>
<td>4 star</td>
<td>28%</td>
<td>35%</td>
<td>33%</td>
</tr>
<tr>
<td>5 star</td>
<td>7%</td>
<td>11%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know/ Can’t Remember</td>
<td>19%</td>
<td>21%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**IN COMPARISON TO VISITORS OF OTHER COUNTRYSIDE DESTINATIONS, VISITORS TO WILTSHIRE ARE SIGNIFICANTLY MORE LIKELY TO STAY IN HOTELS OR FRIENDS HOMES. ACCOMMODATION CHOICES IN WILTSHIRE ARE MORE SIMILAR TO THE AVERAGE GB DESTINATION THAN COUNTRYSIDE DESTINATION. WILTSHIRE IS HOWEVER, DIFFERENTIATED FROM THE AVERAGE GB DESTINATION THROUGH SIGNIFICANTLY HIGHER UPTAKE OF HOLIDAY CAMPS/VILLAGES. WILTSHIRE ALSO HAS SIGNIFICANTLY HIGHER UPTAKE OF 3 ACCOMMODATION OPTIONS IN COMPARISON TO THE REST OF THE COUNTRY.**

Base: Most recently visited destination n=104 Countryside destination n= 1695 Total base n=12179

Question name: In tables
Consideration, satisfaction & intention to visit

### Loyalty Ladder

<table>
<thead>
<tr>
<th></th>
<th>Wiltshire destination average</th>
<th>Countryside destination average*</th>
<th>Great Britain destination average*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Loyal</strong></td>
<td>11%</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>(I often/sometimes take holidays there and intended to in the next year/couple of years)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Considerers</strong></td>
<td>50%</td>
<td>49%</td>
<td>48%</td>
</tr>
<tr>
<td>(I have been/never been to this destination before but would like to in the future)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Rejecters</strong></td>
<td>26%</td>
<td>27%</td>
<td>26%</td>
</tr>
<tr>
<td>(I have been/never been to this destination before and am not likely to do so in the future)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Satisfaction</strong></td>
<td>49%</td>
<td>54%</td>
<td>48%</td>
</tr>
<tr>
<td><strong>Likelihood to revisit (C88)</strong></td>
<td>8.2</td>
<td>8.3</td>
<td>8.4</td>
</tr>
</tbody>
</table>

Base: 700/104  
1695  
12179

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LOYALTY TO WILTSHIRE IS LESS THAN THAT OF OTHER COUNTRYSIDE DESTINATIONS. CONSIDERATION AND REJECTION OF THE DESTINATION ARE BOTH IN LINE WITH THE COUNTRYSIDE DESTINATION AVERAGE. SATISFACTION WITH VISITS TO THIS DESTINATION IS LOWER THAN COUNTRYSIDE DESTINATIONS BUT IN LINE WITH THE GB AVERAGE.

* Averages taken manually from averaging each destination, not via nett.
## Destination attribute satisfaction – among visitors to Wiltshire

### Destination attributes difference analysis

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Countryside</th>
<th>GB</th>
</tr>
</thead>
<tbody>
<tr>
<td>The quality of the natural environment</td>
<td>84%</td>
<td>87%</td>
</tr>
<tr>
<td>Being welcoming and friendly</td>
<td>73%</td>
<td>80%</td>
</tr>
<tr>
<td>The range of attractions and things to do</td>
<td>71%</td>
<td>65%</td>
</tr>
<tr>
<td>The quality of food &amp; drink</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Its history and heritage (famous buildings, castles,...)</td>
<td>69%</td>
<td>73%</td>
</tr>
<tr>
<td>The quality of accommodation options</td>
<td>68%</td>
<td>74%</td>
</tr>
<tr>
<td>The customer service given</td>
<td>68%</td>
<td>70%</td>
</tr>
<tr>
<td>The ease of getting around the destination</td>
<td>67%</td>
<td>66%</td>
</tr>
<tr>
<td>Having a good range of outdoor activities</td>
<td>66%</td>
<td>67%</td>
</tr>
<tr>
<td>Offering a distinctive, authentic experience</td>
<td>62%</td>
<td>71%</td>
</tr>
<tr>
<td>The availability of information about the destination...</td>
<td>62%</td>
<td>66%</td>
</tr>
<tr>
<td>Its overall value for money</td>
<td>60%</td>
<td>66%</td>
</tr>
<tr>
<td>The ease of getting to the destination</td>
<td>59%</td>
<td>63%</td>
</tr>
<tr>
<td>The availability of information about the destination...</td>
<td>57%</td>
<td>67%</td>
</tr>
<tr>
<td>The availability of individual/independent local shops</td>
<td>55%</td>
<td>57%</td>
</tr>
</tbody>
</table>

**THE RANGE OF ATTRACTIONS AND THINGS TO DO IS A RELATIVE STRENGTH FOR WILTSHIRE, HOWEVER THE DESTINATION DOES NOT SIGNIFICANTLY OUTPERFORM COUNTRYSIDE OR GB DESTINATIONS FOR ANY ATTRIBUTES. THE PERCEIVED AVAILABILITY OF INFORMATION AT THE DESTINATION IS SIGNIFICANTLY LOWER THAN OTHER DESTINATIONS.**

Base: Wiltshire  n=104, Countryside=1695 Total n=12179

Question name: C90 Destination attributes
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.

**Thematic images endorsement**

- Rural: 62% ↑
- Food and beverage: 57% ↑
- Friends: 53% ↑
- Family: 52% ↑
- Relax: 50% ↑
- Festivals: 43% ↑
- Historic: 41% ↑
- Sports: 40% ↑
- Arts: 37% ↑
- Nature: 36% ↑
- Shopping: 32% ↑
- Adventure Sport: 29% ↑
- Coastal: 24% ↓
- Seaside: 17% ↓

**Perceptions of Destination**

- Relaxing: 66%
- Quality accommodation: 62%
- Welcoming: 61%
- Authentic: 61%
- Lots to see and do: 59%
- For all seasons: 55%
- Easy to get to: 54%
- Beautiful: 53%
- Traditional: 52%
- Distinct identity: 51% ↓
- Fun: 48%
- Value for money: 45%
- Romantic: 43%
- More for the old: 42%
- Stylish: 38%
- Breath taking: 38% ↓
- Upmarket: 38%
- Exciting: 36% ↓
- Out of the ordinary: 34%
- More for the young: 24%

**Great Britain**

- Relaxing: 60%
- Quality accommodation: 64%
- Welcoming: 61%
- Authentic: 61%
- Lots to see and do: 54%
- For all seasons: 50%
- Easy to get to: 50%
- Beautiful: 57%
- Traditional: 54%
- Distinct identity: 62%
- Fun: 56%
- Value for money: 51%
- Romantic: 44%
- More for the old: 39%
- Stylish: 40%
- Breath taking: 48%
- Upmarket: 36%
- Exciting: 46%
- Out of the ordinary: 42%
- More for the young: 33%

Wiltshire stands out among domestic holiday makers as a rural and family destination when compared with the rest of GB. Beyond this however, holiday makers are unsure of what stands out for Wiltshire and the destination does not over index for any perceptive statements. Wiltshire also scores significantly lower on distinct identity, breath taking and exciting.

Base: Wiltshire  n=320, 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

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: Wiltshire

- A little less than half of domestic holiday makers in GB have taken a trip to Wiltshire. Just over a third of those who have visited have done so within the last year.

- Wiltshire attracts a demographic which mirrors that of the rest of GB, with only a few minor regional skews.
  - The destination attracts significantly more visitors from the South West than other destinations do and significantly less visitors from Yorkshire and Scotland.

- Hotels are the most commonly used accommodation, significantly more common than at other countryside destinations. The destination also has a larger proportion of visitors staying in friends and relatives homes when compared to other countryside destinations.

- Loyalty and likelihood to revisit Wiltshire is a little lower than the GB average, satisfaction with visit and consideration of Wiltshire as a destination, is however, on a par with the rest of GB.

- Wiltshire is not as distinctive as other destinations. While scoring above the countryside average for range of activities, other perceptive statements are endorsed consistently less often for Wiltshire than other destinations.

- In the domestic holiday maker market, Wiltshire is seen as more of a rural and family friendly destination than other GB destinations. However, no other perceptual statements stand out for Wiltshire and endorsement levels are around that of the average level for a GB destination.

- A watch out: Wiltshire performs less well than other destination in terms of distinctiveness, both among visitors and the broader domestic holiday maker market.