



Suffolk Destination Report

Background, sample, and scope of report

- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and Visit Wales have been tracking visitor perceptions of holiday destinations across GB in a continuous weekly tracking study
- In early 2018, VisitEngland commissioned the production of several destination summary reports, drawing on the findings from the continuous tracking data, for all destinations where sample sizes were sufficiently robust
- The sample base for the study is GB holiday takers – those who have taken a GB break in the past 12 months or are expecting to in the next 12 months
- Data in this report is from April 2015 – January 2018
- This report provides insights into:
 - **Visitation loyalty** – the proportion of people considered as loyal, considerers, or rejecters of the destination based on their behaviours and attitudes (amongst all GB holiday takers, including visitors and non-visitors); satisfaction and likelihood to revisit (amongst visitors only - those whose most recent GB holiday was to the destination in this report)
 - **Satisfaction** – how people rate their satisfaction with the destination on a range of attributes (amongst visitors only - those whose most recent GB holiday was to the destination in this report)
 - **Perceptions** – which imagery and word statements people associate with the destination (amongst all GB holiday takers, including visitors and non-visitors)
- A destination type average (city / large town; small town; seaside – resort / town; rural / countryside) and a GB national average is given to provide a point of comparison for results. Averages are calculated from all of the destinations asked about in the study.
- Significant differences are indicated by a **black**↑/**orange**↓ arrow against the destination type average and a **blue**↑/**red**↓ arrow against the GB average
- For detail on the question wording and methods used to arrive at the data for each measure, please see slides 6-7

Consideration, Satisfaction & Intention to Visit

Loyalty Ladder

| | Suffolk destination average | Rural Countryside * | Great Britain destination average* |
|--|-----------------------------|---------------------|------------------------------------|
| Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years) | 14% | 17% | 17% |
| Considerers (I have been/never been to this destination before but would like to in the future) | 49% | 49% | 48% |
| Rejecters (I have been/never been to this destination before and am not likely to do so in the future) | 25% | 27% | 25% |
| Satisfaction Likelihood to revisit | 47% | 55% | 49% |
| | 8.3 | 8.3 | 8.4 |
| Base n= | 1212/152 | 2867 | 20558 |

Base: Suffolk reduced destination list n=1212/ Suffolk most recently visited destination n=152
 Question name: See slide 6

Destination Attribute Satisfaction – Among visitors to Suffolk

Destination attributes difference analysis

| | | Rural Countryside | GB |
|--|---------|-------------------|-----|
| The quality of the natural environment | 84% | 87% | 82% |
| Being welcoming and friendly | 77% | 80% | 74% |
| The customer service given | 75% | 71% | 69% |
| The quality of food & drink | 74% | 74% | 73% |
| Having a good range of outdoor activities | 71% | 68% | 67% |
| The quality of accommodation options | 67% | 74% | 72% |
| The availability of information about the destination once you're there | 65% | 67% | 69% |
| The availability of information about the destination before you get there | 63% | 68% | 69% |
| Offering a distinctive, authentic experience | 61% ↓ | 72% | 69% |
| Its overall value for money | 61% | 67% | 64% |
| The ease of getting to the destination | 60% | 63% | 67% |
| The ease of getting around the destination | 60% | 67% | 70% |
| Its history and heritage (famous buildings, castles, monuments) | 60% ↓ ↓ | 73% | 71% |
| The range of attractions and things to do | 60% | 65% | 68% |
| The availability of individual/independent local shops | 58% | 57% | 62% |

Base: Suffolk n=152, Rural Countryside =2867, GB n=20558
 Question name: See slide 7

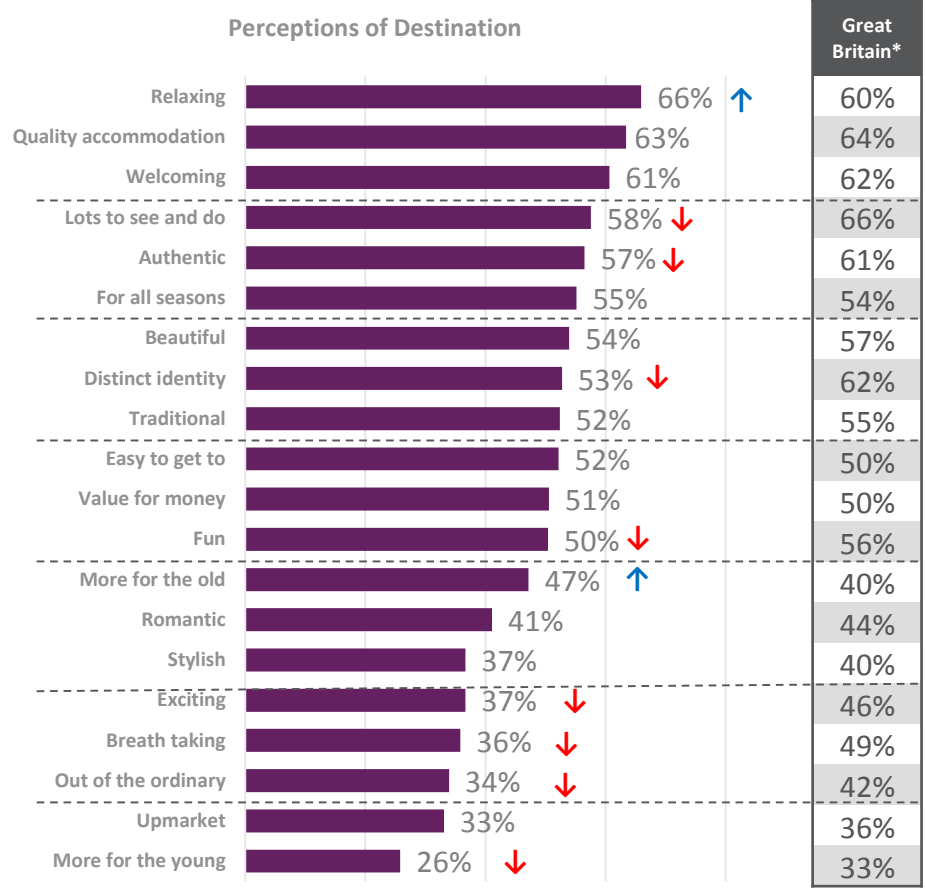
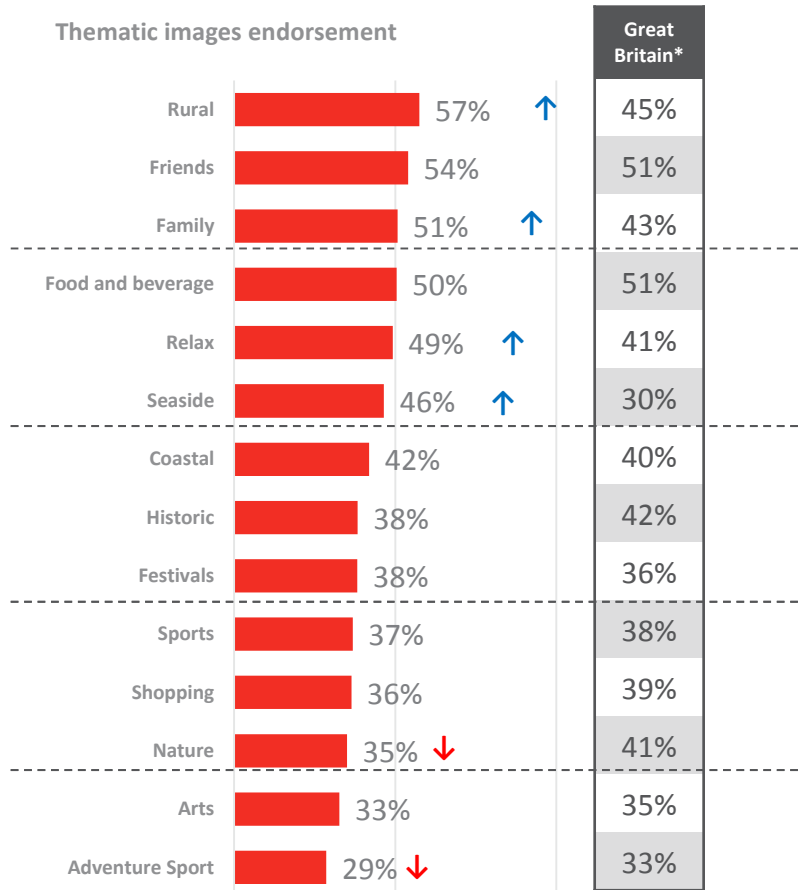
Significant differences will be indicated by a black ↑/orange ↓ arrow against countryside destinations and a blue ↑/red ↓ against GB



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.

Statements shown as image boards, please see next slide



Base: Suffolk n=544, GB n=20558

Question name: See slide 7

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

How results are calculated (1) – Consideration, satisfaction & intention to visit

- Data for the proportion of respondents classified as ‘loyal’, ‘considerers’, and ‘rejecters’ is drawn from the following question, which each respondent is asked about for 4 GB destinations at random (whether they have previously visited the destination before or not)

“Now thinking about regions or places within the UK. For each, please indicate which ONE statement most applies?”

- (1) I often take short breaks or holidays there and intend to do so again within the next year*
- (2) I sometimes take short breaks or holidays there and intend to do so again in the next couple of years*
- (3) I have taken a short break or holiday there once or twice before and might do so again*
- (4) I have never been on a holiday or short break there but would like to*
- (5) I have taken a short break or holiday there before, but am unlikely to do so again*
- (6) I have never taken a short break or holiday there before and am not likely to in the future*
- (7) I don’t know this destination/ cannot answer the question*

- Each respondent is classified as follows: Codes 1, 2 = ‘Loyal’; Codes 3, 4 = ‘Considerer’; Codes 5, 6 = ‘Rejecter’
- Satisfaction data is drawn from the following question which is asked only to those who’s most recent GB holiday was to the destination in this report

“Thinking of this most recent trip, how would you rate your experience of [destination] overall in terms of a holiday or short-break? Provide us with an overall score where 10 is excellent and 1 is not good at all.”

- The satisfaction percentage corresponds to the proportion of respondents selecting the top two box (9 or 10 on the scale)
- Data for likelihood to revisit is drawn from the following question, which is asked only to those who’s most recently GB holiday was to the destination in this report

“And now, thinking about the future, please use the scale to indicate how likely you are to visit [destination] again” (Respondents are presented with a 10 point scale where 10 is definitely will visit and 1 is will definitely will not visit’)

- The likelihood to revisit value corresponds to the average score from responses to the question

How results are calculated (2) – Destination attribute satisfaction & perceptions

- For destination attribute satisfaction, data is drawn from asking the following question, which is asked only to those whose most recent GB holiday was to the destination in this report

*“And thinking about this holiday or short break, please tell us how you would rate [destination] on the following attributes using the scale below:”
(Respondents are presented with a 5 point scale from excellent to poor, where 5 is excellent and 1 is poor)*

- The attribute satisfaction percentage corresponds to the proportion of respondents selecting the top two boxes (4 or 5 on the scale)

- For destination attribute perception, data is drawn from two questions, which each respondent is asked about for three destinations that they are aware of at random (whether they have previously visited the destination before or not)
 - 1) *A set of images is shown to each respondent, with different images shown to represent shopping, arts, historic etc. Respondents are asked to select which of the destinations, if any, they associate with each image*
- Thematic image endorsement percentage is calculated from the percentage of agreement with each image

- 2) *“Now we are going to show you a list of things people have said about different destinations for holidays and short breaks in the UK. Thinking about each statement, please indicate which destination in each row you associate with that statement. You can select as many or as few for each statement as you like, or ‘None of these’ if you don’t think the words describe any of the destinations shown.” Respondents are asked to select which of the destinations, if any, they associate with each statement*
- The perceptions of destination percentage is calculated from the percentage agreement with each statement