Understanding Visitor Satisfaction 2013-14

Debrief by TNS at VisitEngland

11th November 2014
Understanding Visitor Satisfaction, 2013-14

What we will cover:

- Introduction
- Tracking performance over time
- Headline performance by segment
- The drivers of satisfaction and changes over time
- The building blocks – destination performance
- Destination type analysis
Introduction

Background
Methodology & Survey Details
Visitor Satisfaction tracking is a key element of the Strategic Framework for Tourism

The Vision
To maximise tourism’s contribution to the economy, employment and quality of life in England.

The Objectives
This Strategic Framework aims to achieve four interdependent objectives. These have been developed through wide consultation with the industry and are defined by four pillars of work, designed to address the opportunities and challenges for England’s visitor economy.

Objective 02: To offer visitors compelling destinations of distinction.

Objective 03: To champion a successful, thriving tourism industry.

Objective 04: To facilitate greater engagement between the visitor and the experience.

Raising satisfaction levels in the visitor experience and encouraging more UK residents to enjoy the destinations on their doorstep are key elements in increasing visitor spend and contributing to the 5% growth target.

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Understanding Visitor Satisfaction, 2013-14
VE Brand and Satisfaction tracker: What is it?

**What?**
- An online survey collecting information about “brand England,” VE campaigns and visitor satisfaction (running since October 2009)

**Who?**
- A representative sample of English residents who are holiday takers (1+ night in paid accommodation, anywhere in the world) and non-rejectors of England

**How Many?**
- 100 per week - 5000 over 12 months
- This report: July 2013-June 2014 (12 months)
  - 4,992 respondents, 86% have taken a trip(s) – 4,279 trip takers
Tracking Performance over Time
Visitor Experience TRI*M - going beyond traditional measures of satisfaction

**Headline Satisfaction Index**

- **Key Performance Indicator** amongst ‘last 12 months’ visitors to benchmark and monitor the strength of visitor retention

**Understand what’s driving satisfaction**

- **Identifying action areas for improvement:** Satisfaction levels with specific elements of the tourism product

<table>
<thead>
<tr>
<th>High level strengths</th>
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<tbody>
<tr>
<td>A31. Unspoilt countryside</td>
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<td>A16. Good quality accommodation</td>
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<td>A02. Welcoming and friendly people</td>
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<td>A04. A place where I feel safe and secure</td>
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<table>
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<th>Low level strengths</th>
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<td>A09. Easy to book your trip/different parts of your trip in advance</td>
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The Visitor Experience TRI*M Index has been based on the answers given to 4 key questions (see below). They are each asked for the specified main destination of their most recent trip then netted for an overall England score.

- How would you rate your overall experience of DESTINATION during your most recent holiday or short break?
- Based on your experiences during this trip, to what extent would you recommend DESTINATION as a destination to friends and family?
- How likely are you to take another holiday or short break in DESTINATION during the next few years?
- Given what you know about places to visit, how would you rate DESTINATION compared to other destinations for holidays or short breaks?
Visitor Experience TRI*M Index
OVERALL ENGLAND – 4,279 interviews: July 2013-June 2014
Some evidence of small but gradual increases in satisfaction levels over last 4 years

- Overall Performance
- Likelihood to Revisit
- Competitive Advantage
- Likelihood to Recommend

Understanding Visitor Satisfaction, 2013-14

Total England 2013-14: 94.2

Low visitor retention: 70, 80, 90
High visitor retention: 90, 100

Visitor retention levels:
- 2011: 92.5
- 2012: 93.8
- 2013: 94.2

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And how does this break down? Recommendation remains the main driver followed by overall performance and revisit.

Encouragingly, a steady, year-on-year increase in ‘top box’ responses for Performance (41%, 42% and 43% respectively) – appears to be the main driver of improvements.
Using three-month rolling averages, the relative stability of the indices is clear although the last 12 months have been more variable.
There are greater variations month-on-month but the 12 month annual indices have risen slightly over the period from 93 to 94.
Analysis by month when trip taken suggests peaks in May around Bank Holidays. Poor weather in recent years may explain subsequent dips in the following month.
Headline performance by segment
Visitor Experience TRI*M Index Lifecycle

Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index Lifecycle

2013-14
BASE: 4279

Pre-nester Independents Empty-nester Families

91 93 93 98

Low customer retention High customer retention

70 80 90 100

Evidence of increasing satisfaction among Pre-Nesters

Pre-Nesters

2011-12: 88
2012-13: 90
2013-14: 91
Families

2011-12: 95
2012-13: 96
2013-14: 98

Year on year increases in satisfaction among families

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Visitor Experience TRI*M Index
Lifecycle

Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index
Lifecycle

2013-14
BASE: 4279

Pre-nester  Independents  Empty-nester  Families
91  93  93  98

Low customer retention

High customer retention

Indypendents

2011-12: 94
2012-13: 95
2013-14: 93

Lower satisfaction rating among Independents than in the previous 2 years
Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index Lifecycle

2013-14
BASE: 4279

Pre-nester  Independents  Empty-nester  Families

Low customer retention

High customer retention

Empty Nesters

Consistent levels of satisfaction among Empty Nesters

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Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index
Holiday Type

2013-14
BASE: 4279

Short break
Mid-length
Longer holiday

92
100
101

Low customer retention
High customer retention

Low customer retention

Short Breaks

2011-12:
2012-13:
2013-14:

91
92
92

No major movement in satisfaction with short breaks

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Visitor Experience TRI*M Index

Holiday Type

Understanding Visitor Satisfaction, 2013-14

2013-14
BASE: 4279

Mid-length holidays

2011-12: 96
2012-13: 98
2013-14: 100

Steady improvement in satisfaction levels on mid-length holidays

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Visitor Experience TRI*M Index
Holiday Type

Understanding Visitor Satisfaction, 2013-14

2013-14
BASE: 4279

Low customer retention

High customer retention

2011-12: 108
2012-13: 103
2013-14: 101

Although remaining high, evidence of declining levels of satisfaction amongst those on longer holidays.

Longer holidays
Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index
Location of Holiday

City breaks

2013-14
BASE: 4279

Low customer retention

High customer retention

40 60 80 100

Touring City Countryside Seaside

2011-12: 91
2012-13: 93
2013-14: 94

A steady increase in satisfaction on city breaks in last 3-4 years

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Countryside

Not too much variation in countryside destination satisfaction – no clear trends

Visitor Experience TRI*M Index
Location of Holiday

Understanding Visitor Satisfaction, 2013-14

2013-14
BASE: 4279

Touring 83
City 94
Countryside 96
Seaside 97

Low customer retention

40 60 80 100

High customer retention

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Seaside

Again, little variation in seaside destination satisfaction – though latest year is best performing.
Touring

A decline in destination satisfaction with touring holidays compared with previous years

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Visitor Experience TRI*M Index
Touring - by star rating

SEGMENT: Touring - WAVE: July 2013 - June 2014
Base 4279

Low customer retention

Touring 4+5 star: 78
Touring 3 star: 83
Touring 1+2 star: 96

High customer retention

70 80 90 100
Visitor Experience TRI*M Index
Accommodation types

Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index
Accommodation types

Hotel

2011-12: 89
2012-13: 91
2013-14: 91

Consistently below average performance from hotels as a whole

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Visitor Experience TRI*M Index
Hotels - by star rating

SEGMENT: Hotels - WAVE: July 2013 - June 2014
Base 4279

Understanding Visitor Satisfaction, 2013-14

Low customer retention

High customer retention

Hotels 1+2 star  Hotel 3 star  Hotel 4+5 star

88 91 96

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Visitor Experience TRI*M Index
Accommodation types

Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index
Accommodation types

B&B / Guesthouse

B&B satisfaction has varied year on year and is now around the average for all trips.

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Visitor Experience TRI*M Index
B&B - by star rating

SEGMENT: B&B’s - WAVE: July 2013 - June 2014
Base 4279

Low customer retention

70
80
90
100

B&Bs 3 star  B&Bs 1+2 star  B&Bs 4+5 star

96  102  103

High customer retention
Visitor Experience TRI*M Index

Accommodation types

**2013-14**

Base: 4279

<table>
<thead>
<tr>
<th>Hotel</th>
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<td>Rented house or flat</td>
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**Visitor Experience**

Year on year increases in satisfaction at holiday camps and villages

**Low customer retention**

**High customer retention**
Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index
Accommodation types

2013-14
BASE: 4279

Hotel
91

B&B / guest house
95

Holiday camp / village
96

Caravan
99

Camping
99

Rented house or flat
102

Low customer retention

High customer retention

70 80 90 100

Caravan

2011-12:
96

2012-13:
92

2013-14:
99

Varied year-on-year levels of satisfaction on caravan holidays

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Visitor Experience TRI*M Index

Accommodation types

2013-14
BASE: 4279

Hotel: 91
B&B / guest house: 95
Holiday camp / village: 96
Caravan: 99
Camping: 99
Rented house or flat: 102

Low customer retention

High customer retention

Camping

2011-12: 92
2012-13: 96
2013-14: 99

Steady increase in satisfaction on camping holidays – from below national average satisfaction to significantly above

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Visitor Experience TRI*M Index

Accommodation types

Understanding Visitor Satisfaction, 2013-14

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Accommodation types

Understanding Visitor Satisfaction, 2013-14

Visitor Experience TRI*M Index

Accommodation types
The slight upward shift in satisfaction overall is reflected in increases among pre-nesters and families especially on mid-length holidays for camping or in holiday villages. City breaks also showing increased satisfaction levels. Only on Touring and longer holidays are levels of satisfaction declining.

<table>
<thead>
<tr>
<th>Category</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self catering</td>
<td>102</td>
</tr>
<tr>
<td>Longer holidays</td>
<td>101</td>
</tr>
<tr>
<td>Mid length holidays</td>
<td>100</td>
</tr>
<tr>
<td>Caravans</td>
<td>99</td>
</tr>
<tr>
<td>Camping</td>
<td>99</td>
</tr>
<tr>
<td>Families</td>
<td>98</td>
</tr>
<tr>
<td>Seaside</td>
<td>97</td>
</tr>
<tr>
<td>Countryside</td>
<td>96</td>
</tr>
<tr>
<td>Holiday camps</td>
<td>96</td>
</tr>
<tr>
<td>B&amp;Bs/Guest houses</td>
<td>95</td>
</tr>
<tr>
<td>Cities</td>
<td>94</td>
</tr>
<tr>
<td>Independents</td>
<td>93</td>
</tr>
<tr>
<td>Empty Nesters</td>
<td>93</td>
</tr>
<tr>
<td>Short breaks</td>
<td>92</td>
</tr>
<tr>
<td>Pre Nesters</td>
<td>91</td>
</tr>
<tr>
<td>Hotels</td>
<td>91</td>
</tr>
<tr>
<td>Touring</td>
<td>83</td>
</tr>
</tbody>
</table>
The Drivers of Satisfaction
Determining the drivers of satisfaction (1)

30-35 attributes of the ‘destination experience’ are asked about:

**Rated in terms of importance to the respondent (Stated Importance)**

‘How important is each of these factors to you when thinking about short breaks or holidays?’

- Extremely Important (Score of 5)
- Very Important (4)
- Fairly Important (3)
- Not Very Important (2)
- Not at All Important (1)

**Rated in terms of how the destination performed during the visit**

‘How would you rate ‘DESTINATION’ on each of the following factors?’

- Excellent (Score of 5)
- Very Good (4)
- Good (3)
- Fair (2)
- Poor (1)

**And a third dimension is derived – Impact on the Experience**

(to what extent does overall satisfaction correlate to each attribute)
Determining the drivers of satisfaction (2)

- **Hygienic**
  - Maintain quality level
  - These items are expected by your consumers.
  - Develop communication strategies

- **Motivators**
  - Build on strengths, eliminate weaknesses
  - Use strengths to communicate

- **Stated importance**
  - Examine engagement
  - Concentrate on quality elements for potential hidden product/variant opportunities
  - Are you spending too much?

- **Hidden opportunities**
  - Use hidden opportunities
  - Exploit before competition and look for new opportunities

- **Impact on customer retention**
  - Low
  - High
Destination England: The TRI*M Grid

A01. Good value for money generally
A02. Welcoming and friendly people
A03. Very high levels of customer service
A04. A place where I feel safe and secure
A05. Clean and tidy environment
A06. Deals and discounts for the destination
A07. Accessible for those with impairments*
A08. Easy to find useful info when planning
A09. Easy to book your trip in advance
A10. Not too expensive to get to
A11. Doesn't take too long to get to
A12. Easy to get to by public transport
A13. Easy to get around by public transport
A14. Clear signposting to find your way around
A15. Availability of reasonably priced car parking
A16. Good quality accommodation
A17. Accommodation that offers value for money
A18. Variety of accommodation that suits my needs
A19. Good quality food, drink and dining
A20. Opportunities to eat/drink local food etc.
A21. Easy to find useful info when you're there
A22. Availability of festivals, music, sporting events
A23. Wide range of attractions and things to do
A24. Availability of individual/independent local shops
A25. Opportunities to visit museums/galleries
A26. Opportunities to see famous buildings
A27. Good range of shopping opportunities
A28. Good nightlife
A29. Attractive/well maintained town/city centre
A30. Interesting towns and villages to visit
A31. Unspoilt countryside
A32. Good range of outdoor activities
A33. Clean and well-maintained beaches
A34. Beaches which are safe and suitable for bathing
A35. Good range of water-based/-beach activities

* Only asked of individuals who have / travelled with someone with an impairment

Understanding Visitor Satisfaction, 2013-14
But we can make analysis much more straightforward using summaries with strengths & weaknesses prioritised based on their grid position......
DESTINATION ENGLAND:
STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained

High level strengths

A31. Unspoilt countryside
A04. A place where I feel safe and secure

Medium level strengths

A30. Interesting towns and villages to visit
A16. Good quality accommodation
A33. Clean and well-maintained beaches
A05. Clean and tidy environment
A18. Variety of accommodation to choose from that suits my needs
A02. Welcoming and friendly people
A34. Beaches which are safe and suitable for bathing
A26. Opportunities to see famous buildings and monuments

Low level strengths

A27. Good range of shopping opportunities
A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance
DESTINATION ENGLAND:
WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase

High level weaknesses
None

Medium level weaknesses
None

Low level weaknesses
A19. Good quality food, drink and dining
A29. Attractive/well maintained town/city centre
A23. Wide range of attractions and things to do
A21. Easy to find useful information about the destination when you're there
A20. Opportunities to eat/drink local food and produce
A03. Very high levels of customer service
A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments) *
A24. Availability of individual/independent local shops
A14. Clear signposting that helps you find your way around the destination
A35. Good range of water-based/beach activities
A10. A destination that is not too expensive to get to
A22. Availability of festivals, music, sporting and cultural events
A15. Availability of reasonably priced car parking
A12. A destination that is easy to get to by public transport

* Only asked of individuals who have / travelled with someone with an impairment
Best performing attributes, 2013-14
Those described by more than a quarter as ‘excellent’

Encouragingly, the vast majority are key motivators

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Unspoilt countryside - COUNTRYSIDE</td>
<td>43%</td>
</tr>
<tr>
<td>A place where I feel safe and secure</td>
<td>31%</td>
</tr>
<tr>
<td>Quality of accommodation</td>
<td>30%</td>
</tr>
<tr>
<td>Interesting towns and villages to visit - COUNTRYSIDE</td>
<td>30%</td>
</tr>
<tr>
<td>Welcoming and friendly people</td>
<td>29%</td>
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<tr>
<td>Value for money of accommodation</td>
<td>26%</td>
</tr>
<tr>
<td>Quality of food, drink and dining</td>
<td>26%</td>
</tr>
<tr>
<td>Good range of shopping opportunities - CITIES</td>
<td>26%</td>
</tr>
</tbody>
</table>
Poorest performing attributes, 2013-14
Those described by less than a quarter as ‘excellent’

Value for money, accessing local information, deals and signposting need attention as all are important but performing below average

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability of festivals, music, sporting and cultural events</td>
<td>15%</td>
</tr>
<tr>
<td>The nightlife - CITIES</td>
<td>16%</td>
</tr>
<tr>
<td>Availability of reasonably priced car parking</td>
<td>17%</td>
</tr>
<tr>
<td>The range of water-based/beach activities - SEASIDE</td>
<td>17%</td>
</tr>
<tr>
<td>Ease of getting around by public transport</td>
<td>18%</td>
</tr>
<tr>
<td>Overall availability of deals and discounts for the destination</td>
<td>19%</td>
</tr>
<tr>
<td>A destination that is easy to get to by public transport</td>
<td>19%</td>
</tr>
<tr>
<td>Availability of individual/independent local shops</td>
<td>20%</td>
</tr>
<tr>
<td>Range of outdoor activities - COUNTRYSIDE</td>
<td>20%</td>
</tr>
<tr>
<td>Clarity of signposting that helps you find your way around the destination</td>
<td>21%</td>
</tr>
<tr>
<td>Opportunities to eat/drink local food and produce</td>
<td>22%</td>
</tr>
<tr>
<td>Ease of finding useful information about the destination when you're there</td>
<td>22%</td>
</tr>
<tr>
<td>Value for money generally</td>
<td>23%</td>
</tr>
<tr>
<td>A destination that is not too expensive to get to</td>
<td>23%</td>
</tr>
</tbody>
</table>
Increases in overall satisfaction driven by increases in ‘excellent’ rating of motivating attributes
(Annual average change, 2011-2014)

<table>
<thead>
<tr>
<th>Motivators</th>
<th>Change (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of finding useful information about the destination when you're there</td>
<td>+8%</td>
</tr>
<tr>
<td>Well maintained town/city centre</td>
<td>+7%</td>
</tr>
<tr>
<td>Levels of customer service</td>
<td>+7%</td>
</tr>
<tr>
<td>Availability of a wide range of attractions and things to do</td>
<td>+5%</td>
</tr>
<tr>
<td>Variety of accommodation to choose from that suits my needs</td>
<td>+4%</td>
</tr>
<tr>
<td>Opportunities to see famous buildings and monuments</td>
<td>+4%</td>
</tr>
<tr>
<td>Welcoming and friendly people</td>
<td>+4%</td>
</tr>
<tr>
<td>Quality of accommodation</td>
<td>+4%</td>
</tr>
<tr>
<td>A place where I feel safe and secure</td>
<td>+3%</td>
</tr>
<tr>
<td>Unspoilt countryside</td>
<td>+3%</td>
</tr>
<tr>
<td>Clean and well-maintained beaches</td>
<td>+2%</td>
</tr>
<tr>
<td>Quality of food, drink and dining</td>
<td>+2%</td>
</tr>
<tr>
<td>Clean and tidy environment</td>
<td>+2%</td>
</tr>
<tr>
<td>Interesting towns and villages to visit</td>
<td>-</td>
</tr>
</tbody>
</table>
Increases in overall satisfaction driven by increases in ‘excellent’ rating of motivating attributes
(Annual average change, 2011-2014)

Hygienics

- Clarity of signposting that helps you find your way around the destination +12%
- Ease of finding useful information about the destination when planning the trip +9%
- A destination that is not too expensive to get to +7%
- Ease of booking your trip/different parts of your trip in advance +6%
- Value for money generally +5%
- Overall availability of deals and discounts for the destination +3%
- Value for money of accommodation -
Increases in overall satisfaction driven by increases in ‘excellent’ rating of motivating attributes (Annual average change, 2011-2014)

- Availability of individual/independent local shops +6%
- Good range of shopping opportunities +5%
- Opportunities to visit museums/galleries and contemporary arts +5%
- Beaches which are safe and suitable for bathing +4%
- Opportunities to eat/drink local food and produce +3%
The building blocks – destination performance
Measures of satisfaction based on main destination on most recent holiday/break in England (July 2012-June 2014)

<table>
<thead>
<tr>
<th>Region</th>
<th>Respondents (Percentage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>South West England:</td>
<td>1,858 respondents (26%)</td>
</tr>
<tr>
<td>Torquay</td>
<td>192</td>
</tr>
<tr>
<td>Other Devon</td>
<td>272</td>
</tr>
<tr>
<td>Total Devon</td>
<td>464</td>
</tr>
<tr>
<td>Cornwall</td>
<td>473</td>
</tr>
<tr>
<td>Bournemouth</td>
<td>170</td>
</tr>
<tr>
<td>Weymouth</td>
<td>67</td>
</tr>
<tr>
<td>Other Dorset</td>
<td>89</td>
</tr>
<tr>
<td>Total Dorset</td>
<td>326</td>
</tr>
<tr>
<td>Bristol</td>
<td>87</td>
</tr>
<tr>
<td>Bath</td>
<td>117</td>
</tr>
<tr>
<td>Somerset</td>
<td>149</td>
</tr>
<tr>
<td>Wiltshire</td>
<td>54</td>
</tr>
<tr>
<td>Gloucestershire</td>
<td>42</td>
</tr>
<tr>
<td>The Cotswolds</td>
<td>90</td>
</tr>
<tr>
<td></td>
<td>London &amp; the South East:</td>
</tr>
<tr>
<td>London</td>
<td>748</td>
</tr>
<tr>
<td>Eastbourne</td>
<td>37</td>
</tr>
<tr>
<td>Other E Sussex</td>
<td>38</td>
</tr>
<tr>
<td>Total E Sussex</td>
<td>75</td>
</tr>
<tr>
<td>Canterbury</td>
<td>22</td>
</tr>
<tr>
<td>Kent coast</td>
<td>94</td>
</tr>
<tr>
<td>Other Kent</td>
<td>59</td>
</tr>
<tr>
<td>Total Kent</td>
<td>175</td>
</tr>
<tr>
<td>Other South East</td>
<td>54</td>
</tr>
<tr>
<td>South of England:</td>
<td>677 respondents (9%)</td>
</tr>
<tr>
<td>Brighton</td>
<td>159</td>
</tr>
<tr>
<td>Other W Sussex</td>
<td>56</td>
</tr>
<tr>
<td>Total W Sussex</td>
<td>215</td>
</tr>
<tr>
<td>Buckinghamshire</td>
<td>23</td>
</tr>
<tr>
<td>Isle of Wight</td>
<td>110</td>
</tr>
<tr>
<td>The New Forest</td>
<td>72</td>
</tr>
<tr>
<td></td>
<td>West Midlands:</td>
</tr>
<tr>
<td>Stratford</td>
<td>65</td>
</tr>
<tr>
<td>Warwickshire</td>
<td>53</td>
</tr>
<tr>
<td>Staffordshire</td>
<td>54</td>
</tr>
<tr>
<td>Birmingham</td>
<td>145</td>
</tr>
<tr>
<td>Shropshire</td>
<td>41</td>
</tr>
<tr>
<td>Other W Midlands</td>
<td>12</td>
</tr>
<tr>
<td>East Midlands:</td>
<td>425 respondents (6%)</td>
</tr>
<tr>
<td>Nottingham</td>
<td>51</td>
</tr>
<tr>
<td>Total Notts</td>
<td>82</td>
</tr>
<tr>
<td>Derbyshire</td>
<td>46</td>
</tr>
<tr>
<td>Lincoln</td>
<td>36</td>
</tr>
<tr>
<td>Leicestershire</td>
<td>34</td>
</tr>
<tr>
<td>Peak District</td>
<td>94</td>
</tr>
<tr>
<td>Skegness</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>East England:</td>
</tr>
<tr>
<td>Great Yarmouth</td>
<td>157</td>
</tr>
<tr>
<td>Other Norfolk</td>
<td>221</td>
</tr>
<tr>
<td>Total Norfolk</td>
<td>378</td>
</tr>
<tr>
<td>Suffolk</td>
<td>99</td>
</tr>
<tr>
<td>Canterbury</td>
<td>51</td>
</tr>
<tr>
<td>Other W Midlands</td>
<td>53</td>
</tr>
<tr>
<td>Northumberland</td>
<td>67</td>
</tr>
<tr>
<td>Other East Anglia</td>
<td>67</td>
</tr>
<tr>
<td></td>
<td>North West England:</td>
</tr>
<tr>
<td>The Lake District</td>
<td>336</td>
</tr>
<tr>
<td>Other Cumbria</td>
<td>32</td>
</tr>
<tr>
<td>Total Cumbria</td>
<td>368</td>
</tr>
<tr>
<td>Blackpool</td>
<td>223</td>
</tr>
<tr>
<td>Lancashire Coast</td>
<td>42</td>
</tr>
<tr>
<td>Other Lancashire</td>
<td>33</td>
</tr>
<tr>
<td>Total Lancashire</td>
<td>298</td>
</tr>
<tr>
<td>Liverpool</td>
<td>126</td>
</tr>
<tr>
<td>Total Merseyside</td>
<td>143</td>
</tr>
<tr>
<td>Manchester</td>
<td>162</td>
</tr>
<tr>
<td>Chester</td>
<td>66</td>
</tr>
<tr>
<td>Other Cheshire</td>
<td>27</td>
</tr>
<tr>
<td>Total Cheshire</td>
<td>93</td>
</tr>
<tr>
<td>Other North West</td>
<td>31</td>
</tr>
<tr>
<td>Yorkshire:</td>
<td>681 respondents (10%)</td>
</tr>
<tr>
<td>York</td>
<td>167</td>
</tr>
<tr>
<td>Leeds</td>
<td>65</td>
</tr>
<tr>
<td>Scarborough</td>
<td>115</td>
</tr>
<tr>
<td>North York Moors</td>
<td>50</td>
</tr>
<tr>
<td>Yorkshire Coast</td>
<td>51</td>
</tr>
<tr>
<td>Yorkshire Dales</td>
<td>84</td>
</tr>
<tr>
<td>Other Yorkshire</td>
<td>73</td>
</tr>
<tr>
<td>Total Yorkshire</td>
<td>650</td>
</tr>
<tr>
<td>Total Humberside</td>
<td>31</td>
</tr>
<tr>
<td></td>
<td>North East England:</td>
</tr>
<tr>
<td>Northumberland</td>
<td>114</td>
</tr>
<tr>
<td>Durham</td>
<td>46</td>
</tr>
<tr>
<td>Newcastle</td>
<td>67</td>
</tr>
</tbody>
</table>
Variations in satisfaction by destination region
(2 year period – July 2012-June 2014

The overall satisfaction index for England across the two year period is 94 – but this masks some fairly large variations across the regions of the country.

Five areas are helping to drive up this overall index – London, the South West, Yorkshire, the North West and the North East. However, performance in the West Midlands, the South East, the East Midlands, the South and the East of England is working against this.

The next slide illustrates however that even within these regions, there are major variations in satisfaction at the destination level. . . . . .
England’s overall performance is driven by high levels of satisfaction in several key destinations and areas, especially:

- Lake District
- Yorkshire – Moors, Dales, Coast & York
- Cornwall
- Torquay
- New Forest
- Northumberland
- Bath
Middle ranking destinations
(2 year period – July 2012-June 2014)

The ‘middle ground’ characterised by a range of different destination types

Source: England Brand Tracker & Visitor Satisfaction Study – fieldwork, July 2012-June 2014; Base: 7192
Overall satisfaction levels in these other destinations are lower:

- Essex
- Staffordshire
- Birmingham
- Lincoln
- Kent coast
- Eastbourne
- Nottingham
- Leeds
- Manchester
- Bristol
The South West:
Strong performance driven by Cornwall, Torquay, Bath and the Cotswolds
(2 year period – July 2012-June 2014)

<table>
<thead>
<tr>
<th>Location</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Torquay</td>
<td>105</td>
</tr>
<tr>
<td>Other Devon</td>
<td>96</td>
</tr>
<tr>
<td>Total Devon</td>
<td>100</td>
</tr>
<tr>
<td>Cornwall</td>
<td>108</td>
</tr>
<tr>
<td>Bournemouth</td>
<td>91</td>
</tr>
<tr>
<td>Weymouth</td>
<td>89</td>
</tr>
<tr>
<td>Other Dorset</td>
<td>93</td>
</tr>
<tr>
<td>Total Dorset</td>
<td>91</td>
</tr>
<tr>
<td>Bristol</td>
<td>85</td>
</tr>
<tr>
<td>Bath</td>
<td>101</td>
</tr>
<tr>
<td>Somerset</td>
<td>95</td>
</tr>
<tr>
<td>Wiltshire</td>
<td>94</td>
</tr>
<tr>
<td>Gloucestershire</td>
<td>86</td>
</tr>
<tr>
<td>The Cotswolds</td>
<td>100</td>
</tr>
</tbody>
</table>
In comparison to the rest of England...
The South of England:
Strong performances from the New Forest, Isle of Wight and Brighton. Poorer performance elsewhere

(2 year period – July 2012-June 2014)

<table>
<thead>
<tr>
<th>Location</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brighton</td>
<td>95</td>
</tr>
<tr>
<td>Other West Sussex</td>
<td>84</td>
</tr>
<tr>
<td>Total West Sussex</td>
<td>92</td>
</tr>
<tr>
<td>Isle of Wight</td>
<td>100</td>
</tr>
<tr>
<td>The New Forest</td>
<td>104</td>
</tr>
<tr>
<td>Portsmouth (*)</td>
<td>86</td>
</tr>
<tr>
<td>Other Hampshire</td>
<td>80</td>
</tr>
<tr>
<td>Oxford</td>
<td>92</td>
</tr>
<tr>
<td>Other Oxfordshire</td>
<td>71</td>
</tr>
<tr>
<td>Total Oxfordshire</td>
<td>86</td>
</tr>
<tr>
<td>Other Southern England</td>
<td>72</td>
</tr>
</tbody>
</table>

(* - Less than 50 respondents)
South East England & London:
The South East is one of the poorer performing regions – with relatively low satisfaction in Eastbourne & East Sussex and the Kent coast. London is a very strong performer however

(2 year period – July 2012-June 2014)

<table>
<thead>
<tr>
<th>Area</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>100</td>
</tr>
<tr>
<td>Eastbourne (*)</td>
<td>82</td>
</tr>
<tr>
<td>Other East Sussex (*)</td>
<td>81</td>
</tr>
<tr>
<td>Total East Sussex</td>
<td>82</td>
</tr>
<tr>
<td>Canterbury (*)</td>
<td>88</td>
</tr>
<tr>
<td>Kent coast (inc Margate, Ramsgate, Dover)</td>
<td>81</td>
</tr>
<tr>
<td>Total Kent</td>
<td>82</td>
</tr>
<tr>
<td>Other South East England (*)</td>
<td>72</td>
</tr>
</tbody>
</table>

(* - Less than 50 respondents)
The East of England:
Norfolk and Suffolk are the best performing areas of the region, around national average. Overall performance reduced considerably by Essex
(2 year period – July 2012-June 2014)

Great Yarmouth 90
Other Norfolk 97
Total Norfolk 94
Suffolk 94
Cambridge 91
Total Cambridgeshire 85
Essex 74
Other East of England/East Anglia 88
West Midlands:
Stratford and Shropshire perform best – all other parts of the region have much lower levels of satisfaction
(2 year period – July 2012-June 2014)

<table>
<thead>
<tr>
<th>Area</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stratford upon Avon</td>
<td>95</td>
</tr>
<tr>
<td>Warwickshire</td>
<td>82</td>
</tr>
<tr>
<td>Staffordshire</td>
<td>74</td>
</tr>
<tr>
<td>Birmingham</td>
<td>75</td>
</tr>
<tr>
<td>Shropshire (*)</td>
<td>91</td>
</tr>
</tbody>
</table>

(* - Less than 50 respondents)
East Midlands:
Performs below the overall England standard – driven up by satisfaction with visits to the Peak District but down by other parts of the region
(2 year period – July 2012-June 2014)

Nottingham 83
Total Nottinghamshire 88
Derbyshire (*) 92
Leicestershire (*) 83
Peak District 98
Lincoln (*) 80
Skegness 91

(* - Less than 50 respondents)
North West:
Strength of this region driven by the Lake District.
Liverpool & Chester also driving up index – but weakened by Blackpool & Manchester
(2 year period – July 2012-June 2014)

The Lake District 111
Other Cumbria (*) 91
Total Cumbria 109
Blackpool 89
The Lancashire Coast (*)
(Morecambe, Lytham St Annes) 84
Total Lancashire 87
Liverpool 96
Total Merseyside 93
Manchester 85
Chester 94
Other Cheshire (*) 90
Total Cheshire 93

(* - Less than 50 respondents)
Yorkshire & the Humber:
Yorkshire characterised by several strongly performing sub-brands. Overall performance reduced by Leeds and other parts of South Yorkshire and Humberside (2 year period – July 2012-June 2014)

<table>
<thead>
<tr>
<th>Location</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>York</td>
<td>104</td>
</tr>
<tr>
<td>Leeds</td>
<td>83</td>
</tr>
<tr>
<td>Scarborough</td>
<td>95</td>
</tr>
<tr>
<td>North York Moors</td>
<td>99</td>
</tr>
<tr>
<td>Yorkshire Coast</td>
<td>102</td>
</tr>
<tr>
<td>Yorkshire Dales</td>
<td>100</td>
</tr>
<tr>
<td>Other Yorkshire</td>
<td>88</td>
</tr>
</tbody>
</table>

VisitEngland™
Understanding Visitor Satisfaction, 2013-14

Attract Brands
North East:
Northumberland is significantly driving up satisfaction within this region – otherwise below average

(2 year period – July 2012-June 2014)

Northumberland 102
Durham (*) 87
Newcastle upon Tyne 92

(* - Less than 50 respondents)
Destination type analysis:

Seaside
Countryside
Cities
## Trip Destination Types:
Volume and Value context from GBTS

### Holiday trips by GB residents in England, 2013 (millions)
- **10.34 (22.4%)** Seaside
- **13.45 (29.1%)** Large city/town
- **8.42 (18.2%)** Small town
- **13.98 (30.3%)** Countryside

### Trends in GB seaside holidays in England

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>(-0.4% pa)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Nights</strong></td>
<td>64.77</td>
<td>63.4</td>
<td>57.18</td>
<td>70.76</td>
<td>60.44</td>
<td>61.01</td>
<td>61.99</td>
<td>55.96</td>
</tr>
<tr>
<td>(-1.4% pa)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Spend</strong></td>
<td>£2,963</td>
<td>£3,129</td>
<td>£2,859</td>
<td>£3,426</td>
<td>£2,996</td>
<td>£3,211</td>
<td>£3,551</td>
<td>£3,139</td>
</tr>
<tr>
<td>(+1.5% pa)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Great Britain Tourism Survey, 2008-2013
Trip Destination Types: Volume and Value context from GBTS

Understanding Visitor Satisfaction, 2013-14

Holiday trips by GB residents in England, 2013 (millions)

- Seaside: 10.34 (22.4%)
- Large city/town: 13.45 (29.1%)
- Small town: 8.42 (18.2%)
- Countryside: 13.98 (30.3%)

Trends in large city/town holidays in England

- Trips (+3.7% pa)
  - 2006: 11.07
  - 2007: 10.17
  - 2008: 11
  - 2009: 12.79
  - 2010: 12.16
  - 2011: 13.14
  - 2012: 14.16
  - 2013: 13.98

- Nights (+2.6% pa)
  - 2006: 26.66
  - 2007: 25.1
  - 2008: 27.47
  - 2009: 29.25
  - 2010: 28.04
  - 2011: 29.24
  - 2012: 31.89
  - 2013: 31.46

- Spend (+6.0% pa)
  - 2006: £2,259
  - 2007: £2,244
  - 2008: £2,454
  - 2009: £2,542
  - 2010: £2,555
  - 2011: £2,949
  - 2012: £3,352
  - 2013: £3,356

Source: Great Britain Tourism Survey, 2008-2013
Trip Destination Types:
Volume and Value context from GBTS

- Seaside: 10.34 million (22.4%)
- Large city/town: 13.45 million (29.1%)
- Small town: 8.42 million (18.2%)
- Countryside: 13.98 million (30.3%)

Understanding Visitor Satisfaction, 2013-14

Holiday trips by GB residents in England, 2013 (millions)

Trends in holidays to small towns in England

- Trips (+2.2% pa)
  - 2006: 7.35
  - 2007: 8.23
  - 2008: 7.73
  - 2009: 8.59
  - 2010: 8.18
  - 2011: 8.96
  - 2012: 8.69
  - 2013: 8.42

- Nights (+3.2% pa)
  - 2006: 23.61
  - 2007: 29.42
  - 2008: 25.2
  - 2009: 28.36
  - 2010: 27.39
  - 2011: 30.09
  - 2012: 27.4
  - 2013: 27.92

- Spend (+3.7% pa)
  - 2006: £1,324
  - 2007: £1,506
  - 2008: £1,425
  - 2009: £1,608
  - 2010: £1,580
  - 2011: £1,747
  - 2012: £1,797
  - 2013: £1,673

Source: Great Britain Tourism Survey, 2008-2013
Trip Destination Types: Volume and Value context from GBTS

Holiday trips by GB residents in England, 2013 (millions)

- Seaside: 10.34 (22.4%)
- Large city/town: 13.45 (29.1%)
- Small town: 8.42 (18.2%)
- Countryside: 13.98 (30.3%)

Trends in holidays to the English countryside

<table>
<thead>
<tr>
<th>Year</th>
<th>Trips</th>
<th>Nights</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>8.91</td>
<td>31.44</td>
<td>£1,610</td>
</tr>
<tr>
<td>2007</td>
<td>9.82</td>
<td>35.84</td>
<td>£1,793</td>
</tr>
<tr>
<td>2008</td>
<td>8.85</td>
<td>32.83</td>
<td>£1,787</td>
</tr>
<tr>
<td>2009</td>
<td>10.87</td>
<td>41.39</td>
<td>£2,102</td>
</tr>
<tr>
<td>2010</td>
<td>10.03</td>
<td>37.07</td>
<td>£1,973</td>
</tr>
<tr>
<td>2011</td>
<td>10.75</td>
<td>38.88</td>
<td>£2,178</td>
</tr>
<tr>
<td>2012</td>
<td>10.1</td>
<td>36.08</td>
<td>£2,381</td>
</tr>
<tr>
<td>2013</td>
<td>10.34</td>
<td>36.77</td>
<td>£2,384</td>
</tr>
</tbody>
</table>

Source: Great Britain Tourism Survey, 2008-2013
In Summary:
Seaside destinations have not benefited from the staycation trends to the same extent as other destination types – especially cities

**Trips, per annum:**
-0.4%

**Share of trips:**
- 2006 → 13:
  - 2006: 34%
  - 2013: 29%

**Av. trip length:**
- 2006 → 13:
  - 2006: 4.5 nights
  - 2013: 4.2 nights

**Trips, per annum:**
+3.7%

**Share of trips:**
- 2006 → 13:
  - 2006: 27%
  - 2013: 30%

**Av. trip length:**
- 2006 → 13:
  - 2006: 2.4 nights
  - 2013: 2.3 nights

**Trips, per annum:**
+2.2%

**Share of trips:**
- 2006 → 13:
  - 2006: 18%
  - 2013: 18%

**Av. trip length:**
- 2006 → 13:
  - 2006: 3.2 nights
  - 2013: 3.3 nights

**Trips, per annum:**
+2.7%

**Share of trips:**
- 2006 → 13:
  - 2006: 21%
  - 2013: 22%

**Av. trip length:**
- 2006 → 13:
  - 2006: 3.5 nights
  - 2013: 3.6 nights

Source: Great Britain Tourism Survey, 2008-2013
Other characteristics (from GBTS 2013):
Major differences in the profile of holidaymakers visiting different types of destination........

Age (% of total)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>16-34</th>
<th>35-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>28%</td>
<td>43%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>21%</td>
<td>45%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>20%</td>
<td>44%</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

Lifecycle (% of total)

<table>
<thead>
<tr>
<th>Lifecycle</th>
<th>Pre-nester</th>
<th>Family</th>
<th>Independent</th>
<th>Empty nester</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>31%</td>
<td>21%</td>
<td>29%</td>
<td>37%</td>
</tr>
<tr>
<td>14%</td>
<td>30%</td>
<td>19%</td>
<td>18%</td>
<td>35%</td>
</tr>
<tr>
<td>12%</td>
<td>35%</td>
<td>18%</td>
<td>16%</td>
<td>33%</td>
</tr>
<tr>
<td>11%</td>
<td>39%</td>
<td>18%</td>
<td>16%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Socio Economic Group (% of total)

<table>
<thead>
<tr>
<th>Socio Economic Group</th>
<th>AB</th>
<th>C1</th>
<th>C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>39%</td>
<td>31%</td>
<td>31%</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>40%</td>
<td>31%</td>
<td>31%</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>41%</td>
<td>31%</td>
<td>31%</td>
<td>35%</td>
<td>29%</td>
</tr>
</tbody>
</table>

Length of holiday (% of total)

<table>
<thead>
<tr>
<th>Length of Holiday</th>
<th>A short break of 1-3 nights</th>
<th>A mid-length holiday of 4-7 nights</th>
<th>A longer holiday of 8+ nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>82%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>64%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>60%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>49%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>34%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>44%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

LEGEND:

- Cities / large towns
- Small towns
- Countryside
- Seaside

SOURCE: GBTS, 2013
Other characteristics (from GBTS 2013):
Seaside holidays much more seasonal than city breaks whilst accommodation usage varies considerably
What visitors claim are ‘extremely important’ and how varies by destination: Greater importance for many seaside attributes possibly reflecting longer trips and more families.

<table>
<thead>
<tr>
<th>Sample Size (July 2011-June 2014)</th>
<th>TOTAL</th>
<th>SEASIDE</th>
<th>COUNTRYSIDE</th>
<th>ALL CITIES</th>
<th>CITIES exc London</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>13188</td>
<td>4223</td>
<td>3627</td>
<td>4093</td>
<td>2904</td>
</tr>
<tr>
<td>Good quality accommodation</td>
<td>38</td>
<td>41</td>
<td>39</td>
<td>36</td>
<td>37</td>
</tr>
<tr>
<td>Accommodation that offers value for money</td>
<td>38</td>
<td>41</td>
<td>35</td>
<td>38</td>
<td>39</td>
</tr>
<tr>
<td>Easily accessible for those with impairments *</td>
<td>37</td>
<td>38</td>
<td>32</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>A place where I feel safe and secure</td>
<td>36</td>
<td>41</td>
<td>35</td>
<td>33</td>
<td>34</td>
</tr>
<tr>
<td>Unspoilt countryside</td>
<td>35</td>
<td></td>
<td>35</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good value for money generally</td>
<td>34</td>
<td>39</td>
<td>31</td>
<td>31</td>
<td>32</td>
</tr>
<tr>
<td>Clean and well-maintained beaches</td>
<td>34</td>
<td></td>
<td>36</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clean and tidy environment</td>
<td>32</td>
<td>36</td>
<td>33</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td>Good quality food, drink and dining</td>
<td>32</td>
<td>35</td>
<td>32</td>
<td>31</td>
<td>33</td>
</tr>
<tr>
<td>Beaches which are safe and suitable for bathing</td>
<td>29</td>
<td>31</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Welcoming and friendly people</td>
<td>28</td>
<td>32</td>
<td>29</td>
<td>25</td>
<td>28</td>
</tr>
<tr>
<td>Variety of accommodation to choose from that suits my needs</td>
<td>28</td>
<td>31</td>
<td>26</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>Interesting towns and villages to visit</td>
<td>27</td>
<td></td>
<td>27</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy to find useful information about the destination when planning</td>
<td>26</td>
<td>29</td>
<td>25</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Easy to book your trip/different parts of your trip in advance</td>
<td>26</td>
<td>28</td>
<td>24</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>A destination that is not too expensive to get to</td>
<td>26</td>
<td>29</td>
<td>21</td>
<td>27</td>
<td>28</td>
</tr>
<tr>
<td>Attractive/well maintained town/city centre - SEASIDE</td>
<td>26</td>
<td>26</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunities to eat/drink local food and produce</td>
<td>25</td>
<td>28</td>
<td>26</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>Very high levels of customer service</td>
<td>24</td>
<td>27</td>
<td>23</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>Clear signposting that helps you find your way around the destination</td>
<td>24</td>
<td>26</td>
<td>22</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Wide range of attractions and things to do</td>
<td>24</td>
<td>28</td>
<td>19</td>
<td>26</td>
<td>23</td>
</tr>
<tr>
<td>Opportunities to see famous buildings and monuments</td>
<td>24</td>
<td></td>
<td>25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attractive/well maintained town/city centre - CITIES</td>
<td>24</td>
<td>24</td>
<td>22</td>
<td>24</td>
<td>25</td>
</tr>
<tr>
<td>Easy to find useful information about the destination when you’re there</td>
<td>23</td>
<td>24</td>
<td>22</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>Overall availability of deals and discounts for the destination</td>
<td>21</td>
<td>25</td>
<td>17</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>A destination that doesn’t take too long to get to</td>
<td>21</td>
<td>23</td>
<td>18</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>Availability of reasonably priced car parking</td>
<td>21</td>
<td>24</td>
<td>20</td>
<td>20</td>
<td>22</td>
</tr>
<tr>
<td>Opportunities to visit museums/galleries and contemporary arts</td>
<td>21</td>
<td>21</td>
<td>19</td>
<td>22</td>
<td>20</td>
</tr>
<tr>
<td>Good range of shopping opportunities</td>
<td>19</td>
<td></td>
<td>19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Easy to get around by public transport</td>
<td>18</td>
<td>19</td>
<td>11</td>
<td>23</td>
<td>20</td>
</tr>
<tr>
<td>Availability of individual/independent local shops</td>
<td>18</td>
<td>21</td>
<td>16</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>A destination that is easy to get to by public transport</td>
<td>17</td>
<td>18</td>
<td>10</td>
<td>23</td>
<td>21</td>
</tr>
<tr>
<td>Good range of outdoor activities - COUNTRYSIDE</td>
<td>15</td>
<td>18</td>
<td>14</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Good range of water-based/beach activities</td>
<td>15</td>
<td>15</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Availability of festivals, music, sporting and cultural events</td>
<td>13</td>
<td>14</td>
<td>9</td>
<td>17</td>
<td>15</td>
</tr>
<tr>
<td>Good nightlife</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Only asked of individuals who have / travelled with someone with an impairment
SEASIDE HOLIDAYS IN ENGLAND, 2011-2014: STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained

High level strengths

A04. A place where I feel safe and secure

Medium level strengths

A16. Good quality accommodation
A05. Clean and tidy environment
A02. Welcoming and friendly people
A33. Clean and well-maintained beaches
A18. Variety of accommodation to choose from that suits my needs
A03. Very high levels of customer service
A17. Accommodation that offers value for money
A34. Beaches which are safe and suitable for bathing

Low level strengths

A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance
SEASIDE HOLIDAYS IN ENGLAND, 2011-2014:
WEAKNESSES: these need to be addressed if the
overall satisfaction rating is to increase

High level weaknesses
None

Medium level weaknesses
None

Low level weaknesses
A32. Good range of outdoor activities
A19. Good quality food, drink and dining
A23. Wide range of attractions and things to do
A20. Opportunities to eat/drink local food and produce
A01. Good value for money generally
A21. Easy to find useful information about the destination when you’re there
A29. Attractive/well maintained town/city centre
A35. Good range of water-based/beach activities
A22. Availability of festivals, music, sporting and cultural events
A15. Availability of reasonably priced car parking
A12. A destination that is easy to get to by public transport
COUNTRYSIDE HOLIDAYS IN ENGLAND, 2011-2014:
STRENGTHS: these need to be maintained to ensure
overall satisfaction levels are retained

High level strengths

A31. Unspoilt countryside
A05. Clean and tidy environment
A04. A place where I feel safe and secure

Medium level strengths

A30. Interesting towns and villages to visit
A16. Good quality accommodation
A02. Welcoming and friendly people
A18. Variety of accommodation to choose from that suits my needs
A19. Good quality food, drink and dining
A03. Very high levels of customer service
A17. Accommodation that offers value for money
A08. Easy to find useful information about the destination when planning the trip

Low level strengths

A09. Easy to book your trip/different parts of your trip in advance
COUNTRYSIDE HOLIDAYS IN ENGLAND, 2011-2014: WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase

High level weaknesses

None

Medium level weaknesses

None

Low level weaknesses

A01. Good value for money generally
A20. Opportunities to eat/drink local food and produce
A21. Easy to find useful information about the destination when you're there
A23. Wide range of attractions and things to do
A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments) *
A22. Availability of festivals, music, sporting and cultural events
A13. Easy to get around by public transport
A12. A destination that is easy to get to by public transport

* Only asked of individuals who have / travelled with someone with an impairment
CITY BREAKS IN ENGLAND, 2011-2014:
STRENGTHS: these need to be maintained to ensure overall satisfaction levels are retained

High level strengths

None

Medium level strengths

A23. Wide range of attractions and things to do
A19. Good quality food, drink and dining
A16. Good quality accommodation

Low level strengths

A26. Opportunities to see famous buildings and monuments
A27. Good range of shopping opportunities
A25. Opportunities to visit museums/galleries and contemporary arts
A08. Easy to find useful information about the destination when planning the trip
A09. Easy to book your trip/different parts of your trip in advance
CITY BREAKS IN ENGLAND, 2011-2014: WEAKNESSES: these need to be addressed if the overall satisfaction rating is to increase

High level weaknesses

None

Medium level weaknesses

A14. Clear signposting that helps you find your way around the destination

Low level weaknesses

A29. Attractive/well maintained town/city centre
A07. Easily accessible for those with impairments (e.g. those with mobility, visual or hearing impairments) *
A21. Easy to find useful information about the destination when you're there
A18. Variety of accommodation to choose from that suits my needs
A03. Very high levels of customer service
A05. Clean and tidy environment
A24. Availability of individual/independent local shops
A01. Good value for money generally
A06. Overall availability of deals and discounts for the destination
A10. A destination that is not too expensive to get to
A15. Availability of reasonably priced car parking

* Only asked of individuals who have / travelled with someone with an impairment