

Visit East of England - Perceptions and Segmentation Research



Prepared by:

February 2022

On behalf of:



VISIT EAST OF ENGLAND

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February 2022





Introduction, Methodology and approach

Destination research was commissioned to conduct a consumer survey among visitors and non-visitors to the East of England. The aims of the study were twofold. Firstly, the research aimed to understand the current perceptions of the region as a tourist destination, in order to identify potential markets and future marketing strategies. Secondly, it sought to understand the profile of current visitors and the barriers for those that don't currently visit the area.

Methodology

The results included in this report are based on responses from two parallel surveys. Firstly, a self-completion survey with 1,211 respondents from an online panel of respondents (with a mixture of recent, past and non-visitors). Secondly, an online survey to 4,751 consumers registered to receive information from Visit East of England, Visit Norfolk, Visit Suffolk and the local DMOs. The combination of the two datasets allowed us to conduct a meaningful segmentation of the key sub-groups of consumers most likely to want to visit in the future.

This report is based on an overall sample 5,962. Please note, as not all questions in the survey were mandatory, sample sizes for certain questions may differ.





Research Outputs – About the respondents

- Please indicate your age
- Please indicate your gender
- Please tell us your home location
- What is your occupation?
- Usual visiting group for holidays, breaks and day trips
- Most recent visit to the East of England





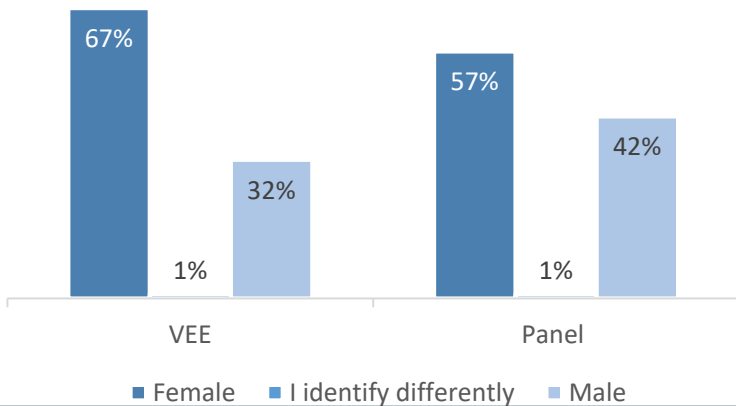
About the respondents

The first section of this report looks at the survey respondents and provides an overview of their profile in terms of gender, age group, socio-economic status and usual visiting party structure. It also analyses the location of their normal place of residence.

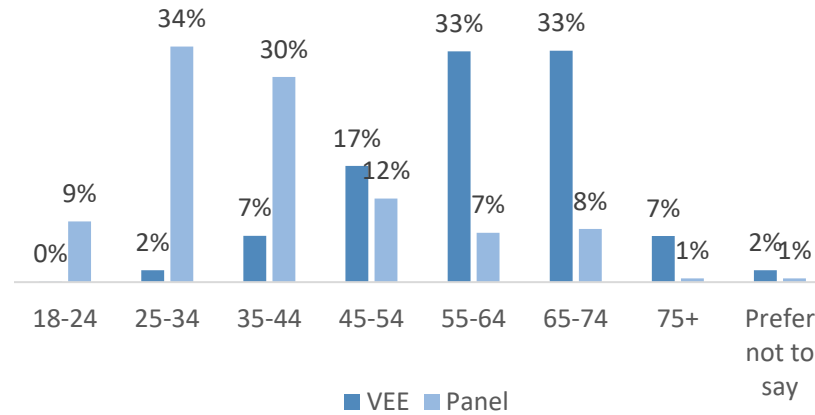
A higher proportion of women took part in the survey, particularly with the VEE consumer dataset (VEE).

The online panel data included a higher proportion of younger adults (64% are aged 25 to 44) and family groups (41%). By contrast, the VEE data included a higher proportion of over 55s (75%) and more couples (52%) than families (23%).

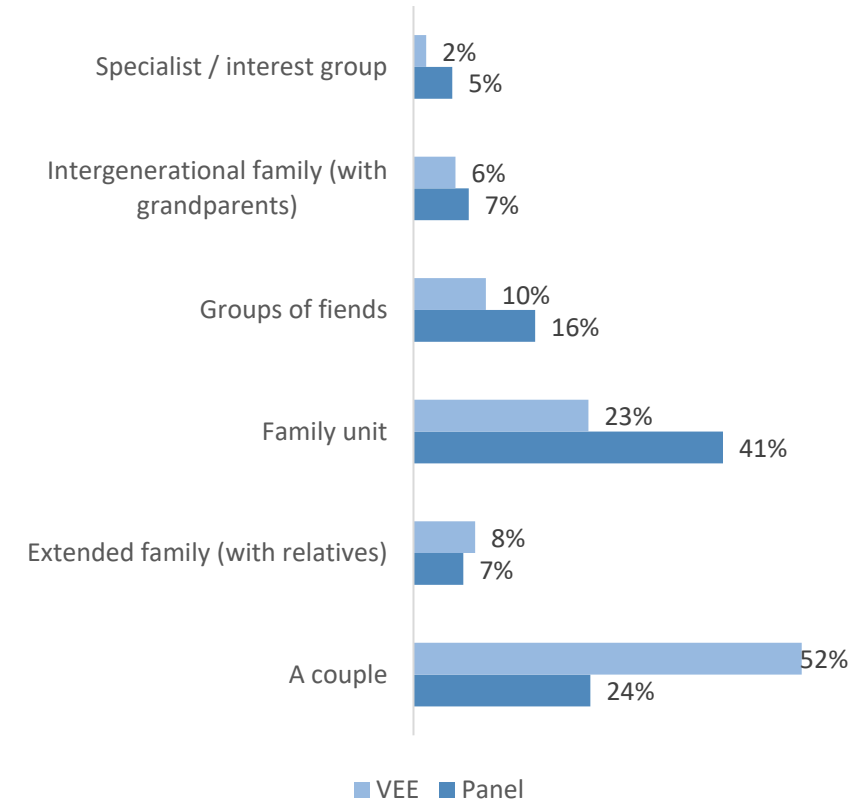
Gender



Age groups



Group composition

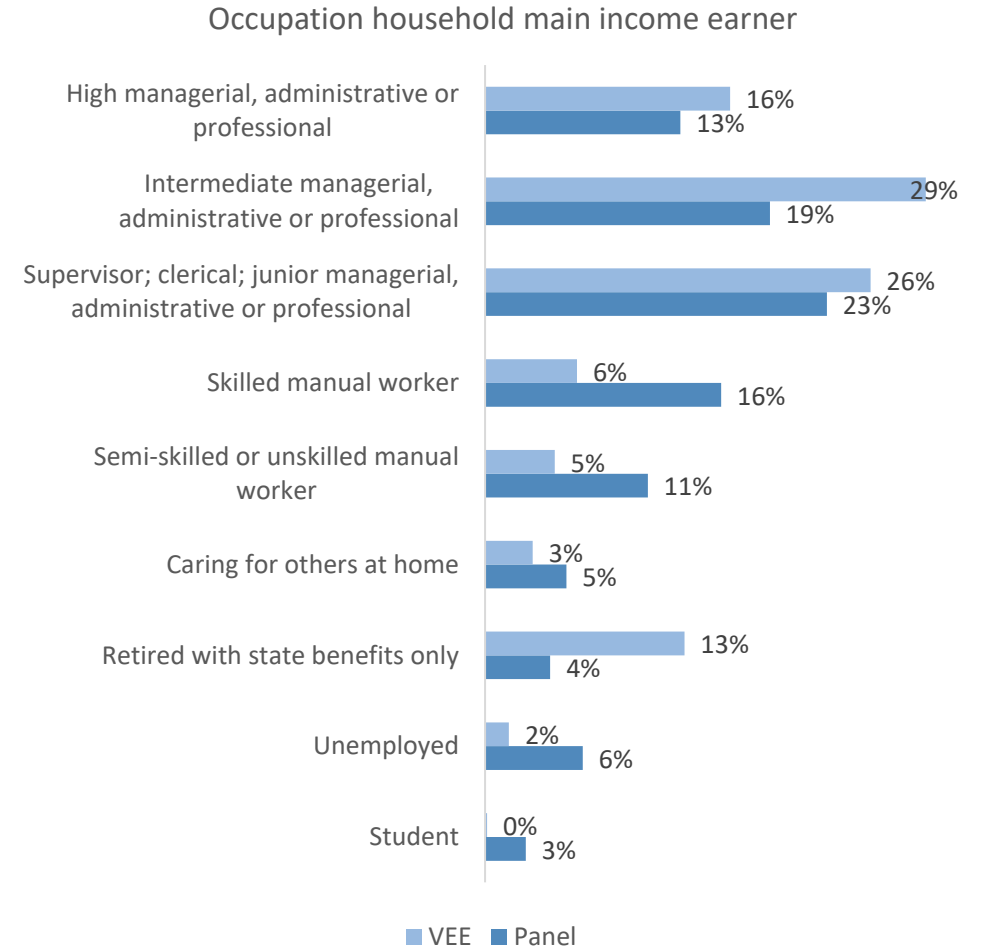
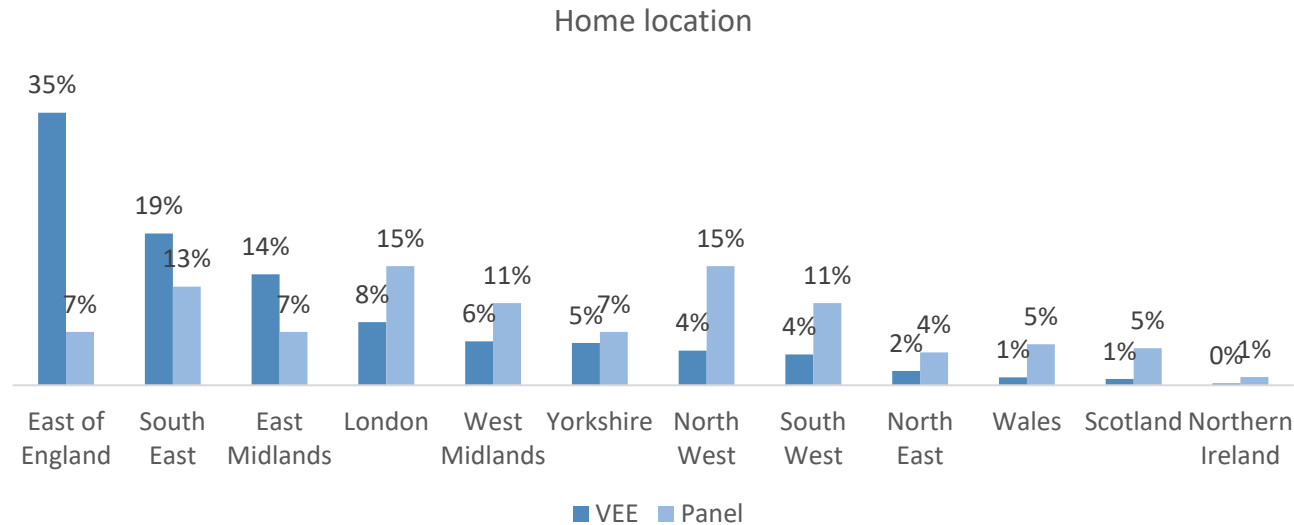




About the respondents

The largest proportion of VEE respondents were in middle (29%) and junior management (26%). Retired people with state benefits only accounted for a further 13%. Looking at the online panel data, the occupation of the household's main income earner is more evenly spread between managerial roles (55%) in total) and skilled / semi-skilled workers (27%).

More than two thirds (68%) of VEE respondents live in the East of England, South East region or East Midlands. As before, the split from the online panel is more spread out, with similar proportions of respondents from London and North West (15% each), South East (13%), West Midlands and South West of England (11% each).

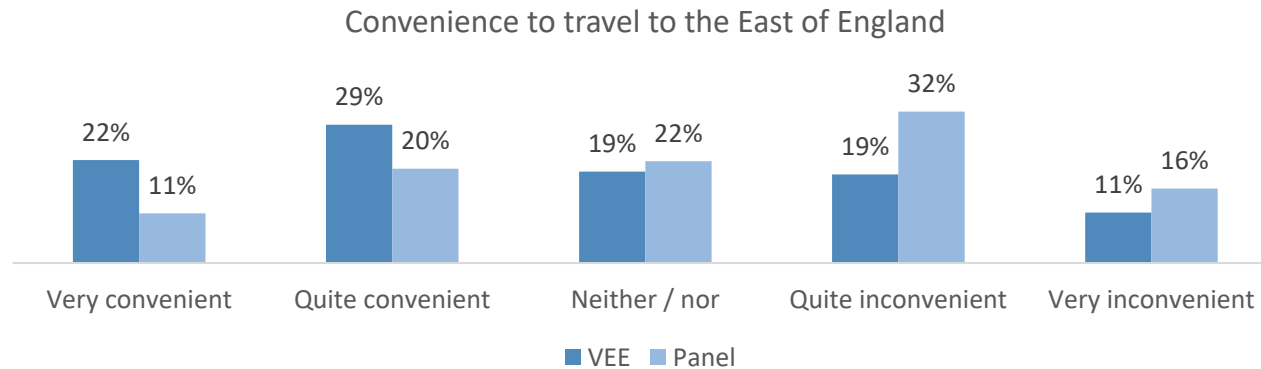




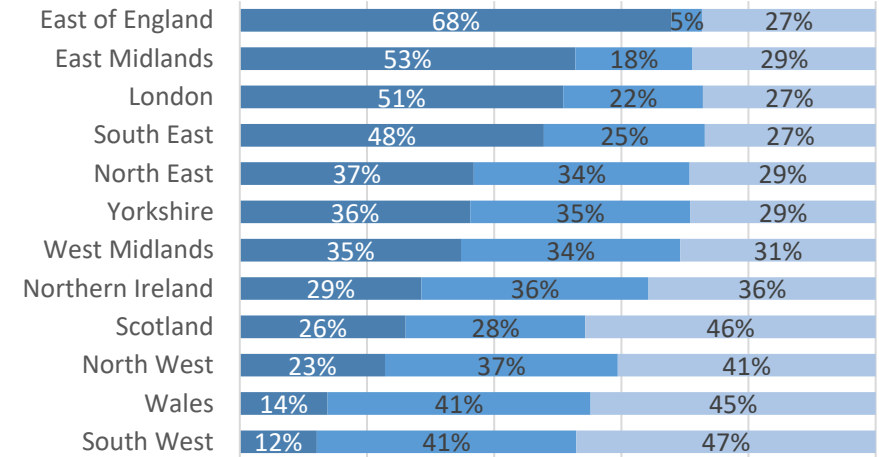
About the respondents - Drive-time and convenience

Just over half of VEE respondents (51%) found travelling to the East of England to be either very convenient (22%) or quite convenient (29%). This compares to only 31% of panel respondents. Conversely, 48% of panellist found travelling to the region quite of very inconvenient.

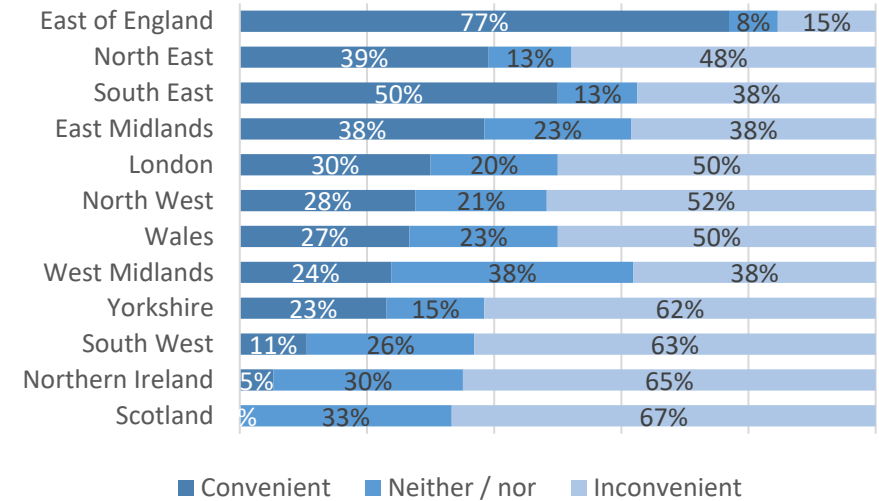
As you would expect, East of England residents found it convenient to travel within the region. Similarly, it is not surprising to see that residents from the East Midlands, London, South East and North East found travelling to the East of England more convenient than those living in other parts of the country, regardless of the data source (VEE or panel).



VEE Dataset



Online panel

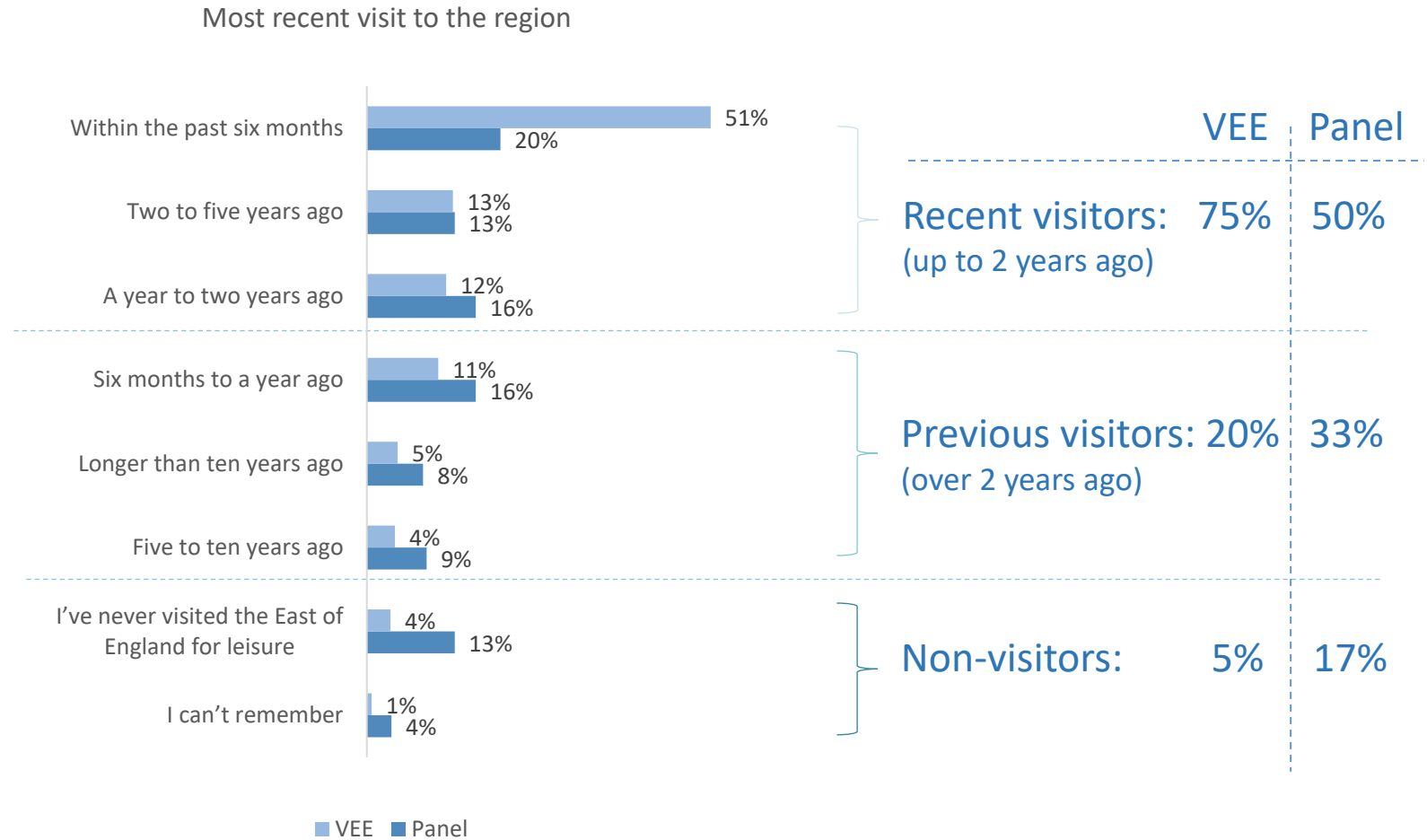




About the respondents

The sample included a mixture of recent and previous visitors. Visits included a day or overnight trip for leisure purposes or to visit friends or relatives but excluded business trips.

As well as understanding the profile and needs of regular visitors, it is important to focus on the markets you don't normally hear about to find out more about those with little or no awareness of the East of England as a leisure destination. Half of respondents from the online panel and a quarter of the VEE dataset had not visited the area within the last two years.

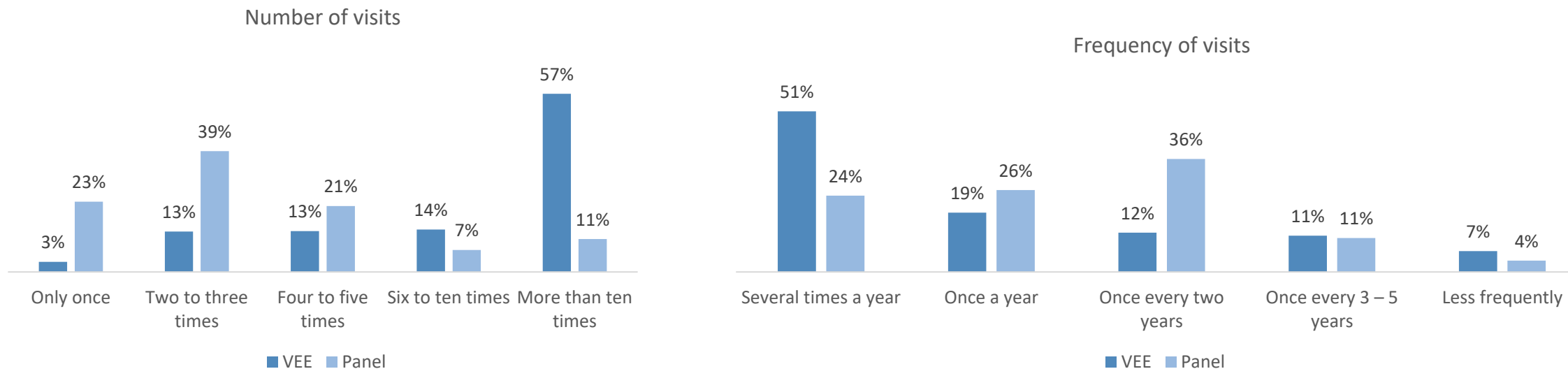




About the respondents - Number and frequency of trips

The VEE dataset included a large proportion of regular visitors - 57% visited more than ten times and 14% had visited between six and ten times. Conversely, three in five (62%) respondents from the panel had only visited three times or less.

Looking at the frequency of visits, half of the VEE respondents (51%) visited several times a year, compared to only 24% for the panel or respondents. Just over a third (36%) of panel respondents visited the region once every two years.





About the respondents - Drive-time and convenience

The results of the drive-time analysis show similar results for the two datasets. About half of VEE respondents (51%) live within a two-hour drive time of region, compared to 41% of the panel respondents. Those within a two to three hours drive-time account for 26% of the VEE sample and 29% of the panel. Those needed three hours or more to reach the East of England range between 23% (VEE) and 30% (panel).

Perceived drive-time (in hours)



VEE

Within 2 hours: 51%

Two to three hours: 26%

Three hours or more: 23%

Panel

Within 2 hours: 41%

Two to three hours: 29%

Three hours or more: 30%



Segmentation – Understanding visitor behaviour

- Visiting party
- the East of England associations
- Awareness of and visits to key destinations
- Trip characteristics
- Activities undertaken
- Information sourcing and communications



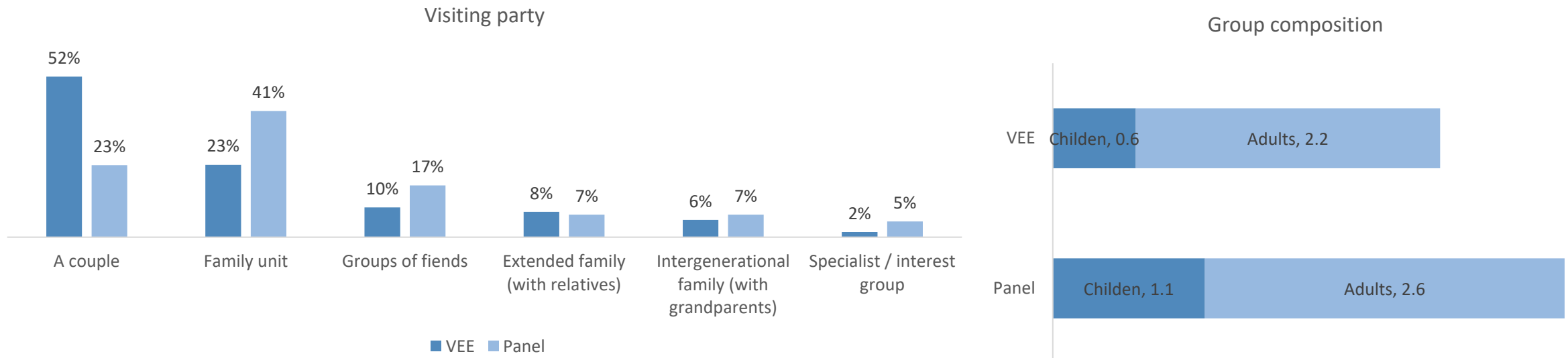


Segmentation – Understanding visitor behaviour

Just over half (52%) of visitor groups from the VEE sample were couples and under a quarter (23%) were family units.

Family units accounted for two in five (41%) visitor groups when looking at the the panel dataset. This proportion increased to 54% when intergenerational families (with grandparents) and extended families (with relatives) were included.

The results of the survey revealed that the size of the average visiting party from the VEE sample was 2.8 people (2.2 adults and 0.6 children). The panel sample included a larger average group (3.7 people), comprising 2.6 adults and 1.1 children for the average visiting party.



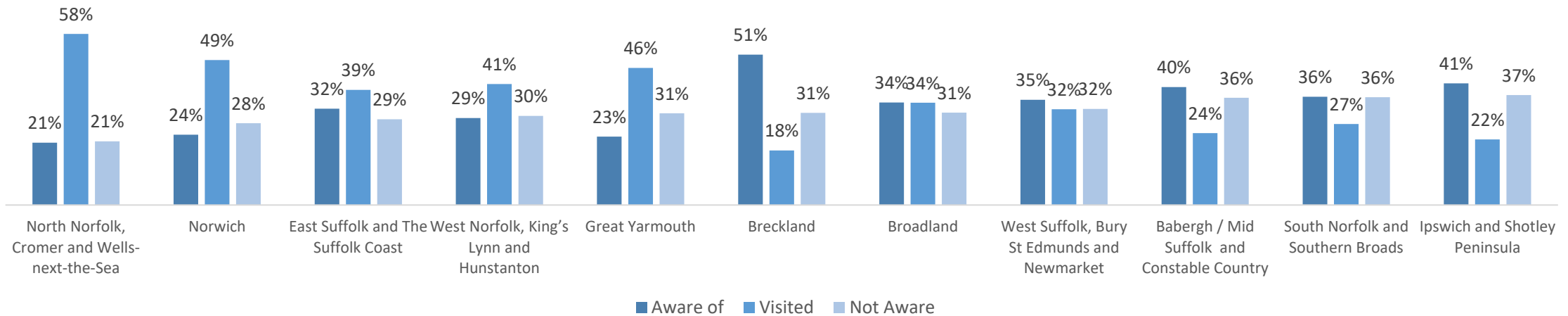


Segmentation – Understanding visitor behaviour – Awareness and visitation – VEE Dataset

According to the VEE dataset of respondents, North Norfolk (including Cromer and Wells-next-the-Sea) was the most popular area of the East of England. Almost three in five (58%) had visited the areas and a further 21% were aware of it (but had not visited). Norwich and Great Yarmouth followed in terms of levels of visitation (49% and 46% respectively). However, more respondents were aware of East Suffolk and West Norfolk (but not visited) when compared to Great Yarmouth.

At the other end of the scale, Ipswich and the Shotley Peninsula, South Norfolk and Babergh / Mid Suffolk and Constable County achieved the lowest levels of awareness.

VEE - Awareness and visitation

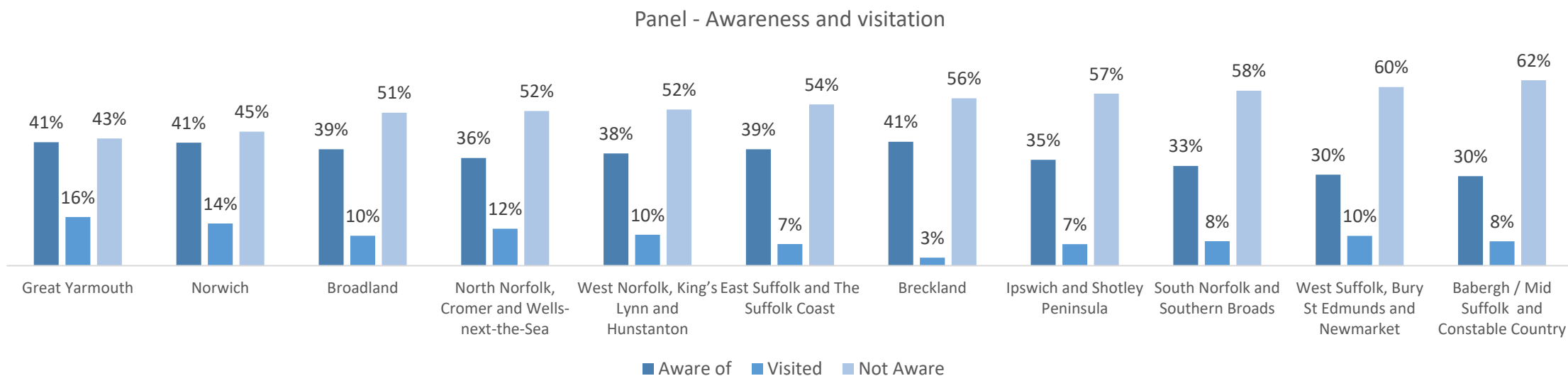




Segmentation – Understanding visitor behaviour – Awareness and visitation – Online panel

Turning out attention to the online panel of responses, Great Yarmouth (16%) and Norwich (14%) were the most popular area of the East of England both in terms of levels of visitation and also in terms of levels of awareness (41% each). Broadland, West Norfolk and North Norfolk followed with just over half of respondents saying they had either visited in the past or they were aware of these areas.

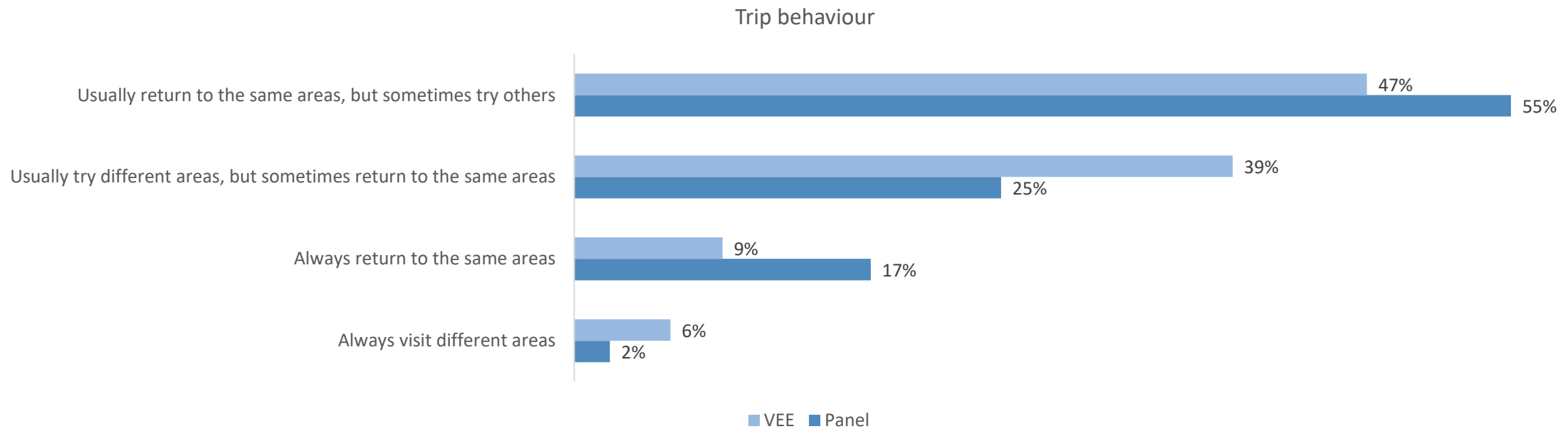
At the other end of the scale, Babergh / Mid Suffolk and Constable County, West Suffolk (including Bury St Edmunds and Newmarket) and South Norfolk and Southern Broads achieved the lowest levels of awareness among panellists.





Segmentation – Understanding visitor behaviour – Awareness and visitation

Just over half (56%) of VEE respondents said they either always (9%) or usually (47%) return to the same areas, compared to 72% of respondents from the online panel. Two in five VEE respondents (39%) said they usually try different areas (but sometimes return of the same areas). In contrast, only 25% of panel respondents said they usually try different areas when visiting the region.





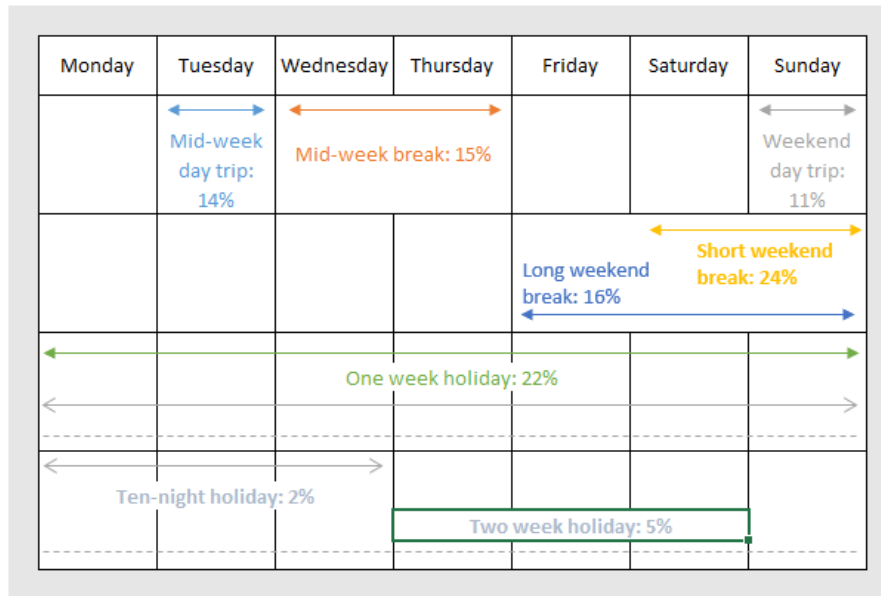
Segmentation – Understanding visitor behaviour

The results of the VEE consumer survey show that the most common length of visits were **short weekend break** (24%) and **one-week holidays** (22%), followed by **long weekend breaks** (16%), **mid-week breaks** (15%) and **mid-week day trips** (14%).

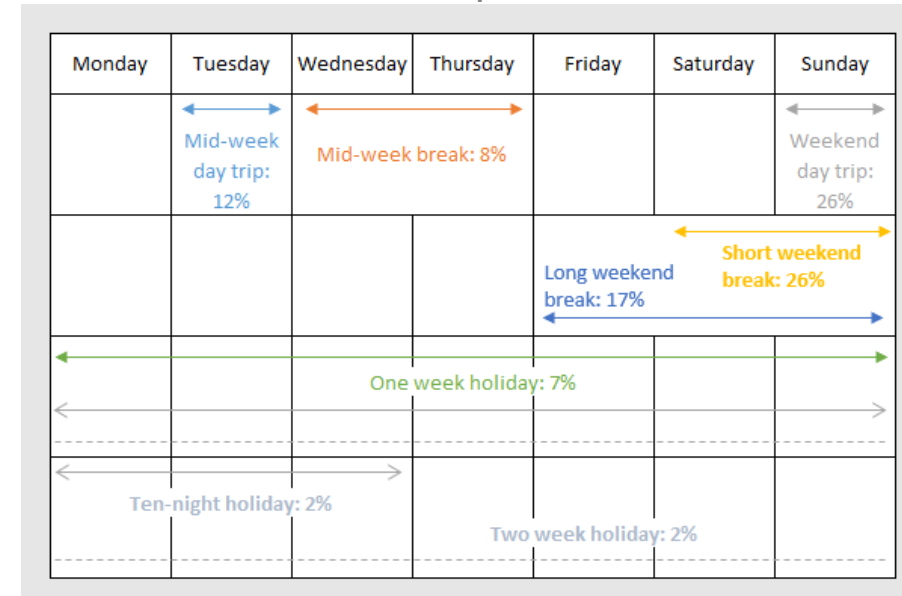
Looking at the online panel of respondents, the most common length of visits were **short weekend break** and **weekend day trips (26% each)**, followed by **long weekend breaks (17%)**.

The results would suggest that Visit East of England was successful in enticing their consumer dataset to enjoy longer holidays at home during the pandemic.

VEE dataset



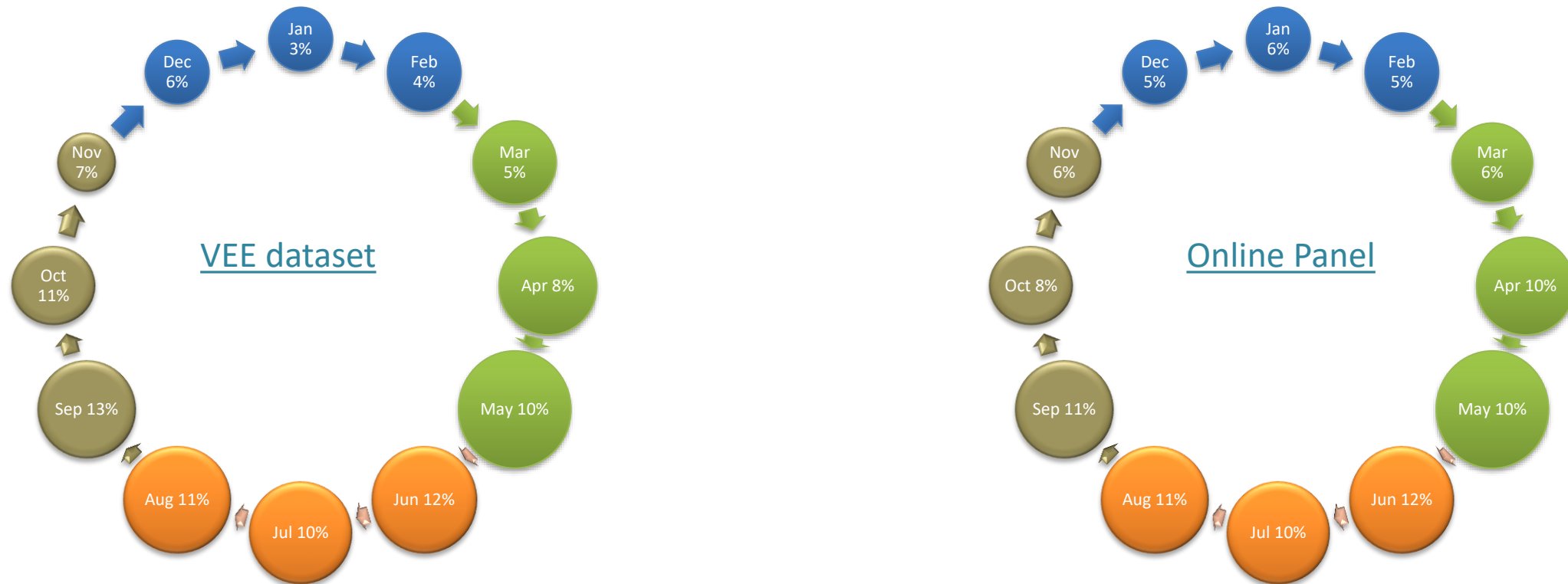
Online panel





Segmentation – Understanding visitor behaviour - seasonality

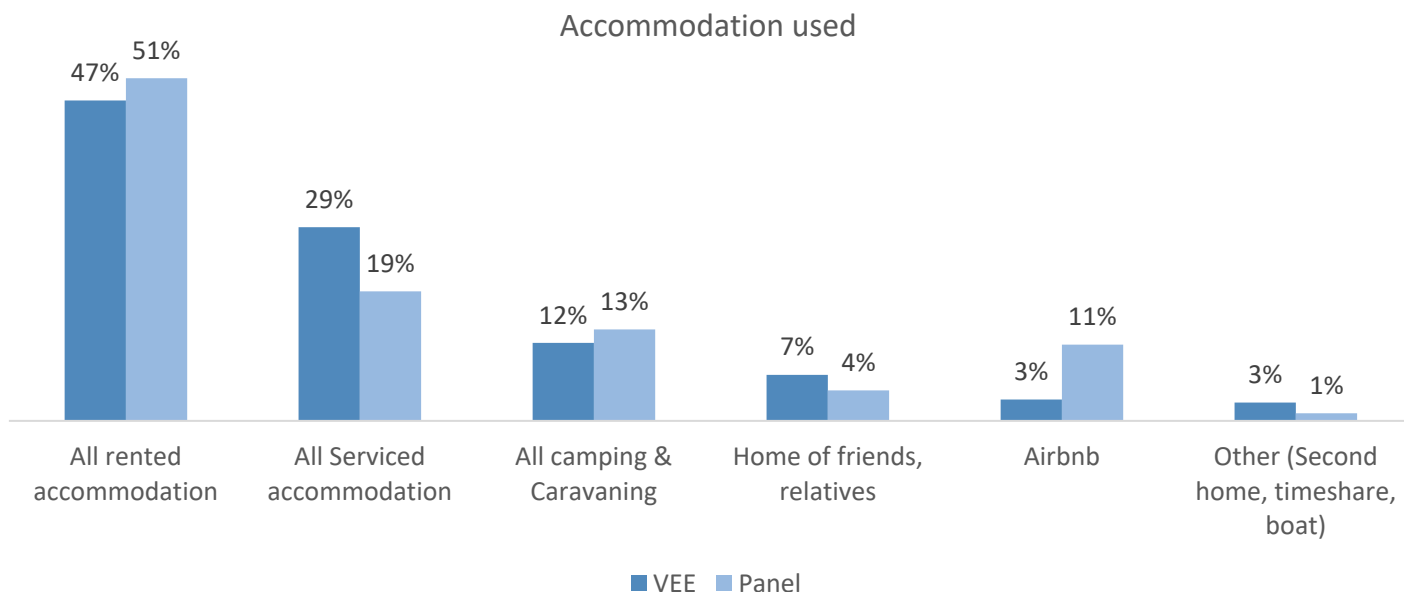
The region's main holiday season between April to September accounts for 64% of all trips made by both VEE and panel respondents. Note that 24% of trips made by respondents from the VEE dataset took place between October and December, compared to only 19% for the panel respondents. Conversely, panel respondents took proportionally more trips during the first three months of the year (17% compared to 12% for VEE respondents).





Segmentation – Understanding visitor behaviour - Accommodation

Overall, rented accommodation (including static caravans, lodges and self catering cottages) were the most popular type of accommodation used. VEE respondents were more likely to have used serviced accommodation establishments (hotels, B&B, guest houses, etc.), whereas online panel respondents were more inclined to use self catering accommodation options, including Airbnb and other home share platforms. One explanation for the popularity of self catering accommodation among online panel respondents may be the higher proportion of younger families included in the panel dataset.



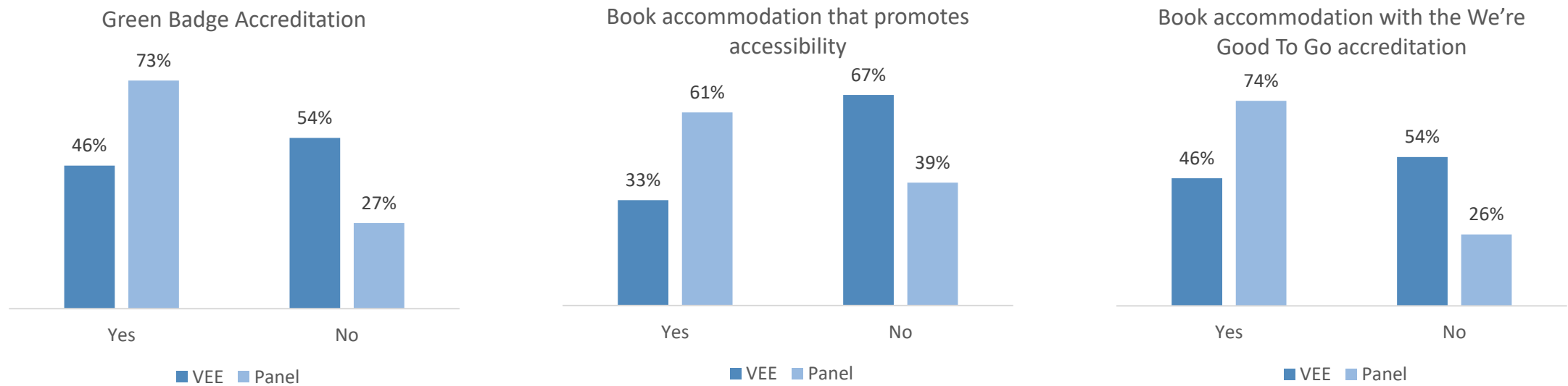
	VEE	Online
Holiday lodge	2%	7%
Holiday park	6%	12%
Static caravan	5%	9%
Self-catering – flat, apartment	6%	3%
Self-catering – rented holiday home, etc.	28%	19%
All rented accommodation	47%	51%
Campervan, motorhome	5%	2%
Glamping	1%	0%
Tent	2%	4%
Touring caravan	4%	7%
All camping & Caravanning	12%	13%
Hotel	19%	10%
Pub or inn	3%	1%
B&B, guesthouse	6%	8%
All Serviced accommodation	29%	19%
Airbnb	3%	11%
Home of friends, relatives	7%	4%
Other (Second home, timeshare, boat)	3%	1%



Segmentation – Understanding visitor behaviour – Accommodation - Accreditations

The results of the survey show significant variations in opinion between the VEE and online samples in relation to accreditations. Overall, VEE respondents are least inclined to book accommodation that promotes accessibility – only 33% of VEE respondents support that idea. Similarly, less than half (46%) would be more likely to book accommodation with a sustainable tourism accreditation such as the Green Badge or to book accommodation with the We’re Good To Go accreditation.

Three quarters of online panel respondents would be more likely to book accommodation with a sustainable tourism accreditation (73%) or with the with the We’re Good To Go accreditation (74%). Three in five (61%) would be more likely to book accommodation that promotes accessibility.



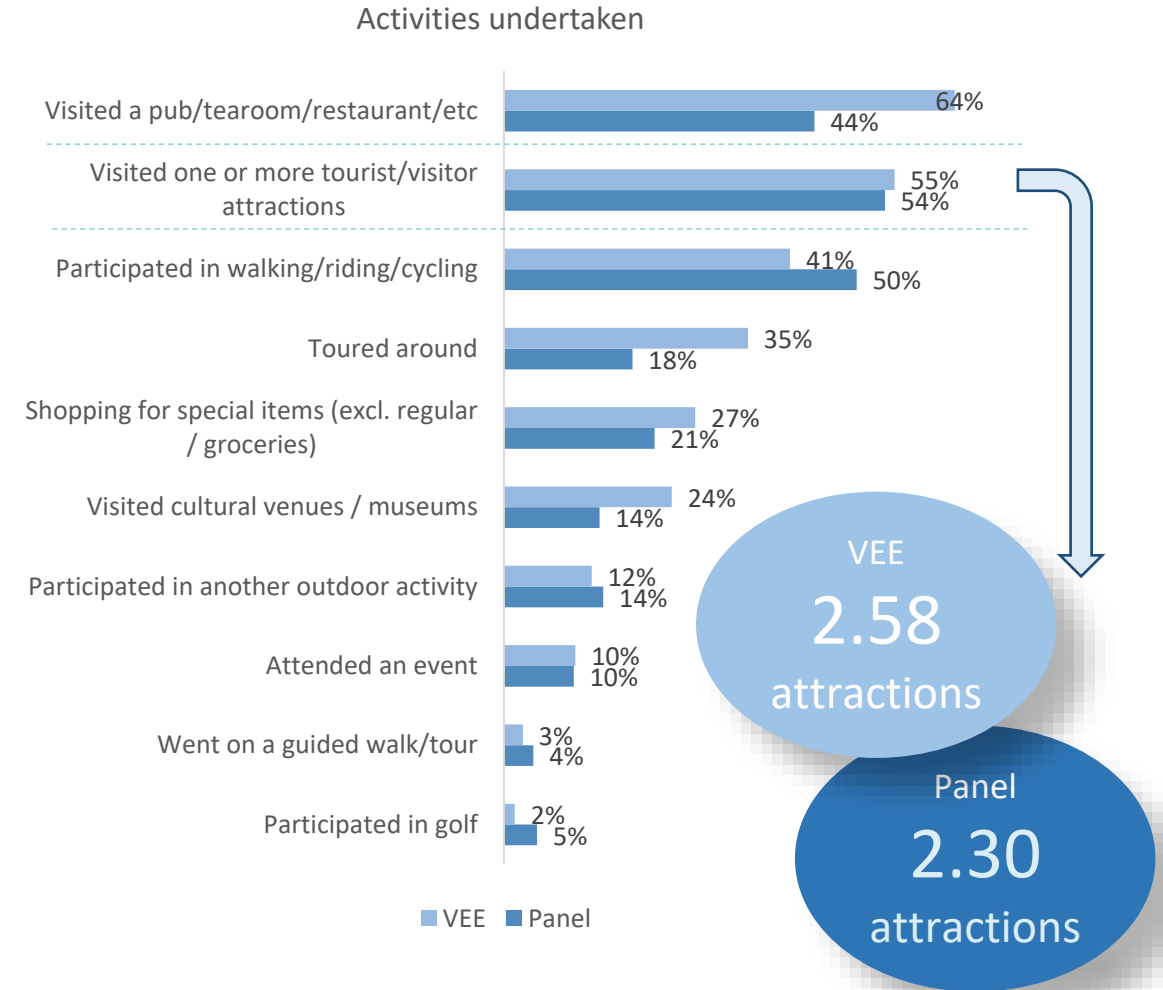


Segmentation – Understanding visitor behaviour – Activities undertaken

Respondents were asked to identify the activities they took part in during their last visit to the East of England. Just over half of respondents (from both datasets) visited one or more attractions during their most recent visit. On average VEE respondents visited 2.58 attractions during their last trip, compared to 2.30 attractions visited by panel respondents.

In terms of other key differences, compared to Online panellists, higher proportions of VEE respondents visited places to eat and drink, toured around, went shopping for special items or visited cultural venues and museums, when

By contrast, online panel respondents were proportionally more interested in outdoor activities, including walking / riding / cycling, golf and other outdoor activities. As mentioned in the previous page, this might be linked to the different profile of respondents included in the online panel (primarily younger families).





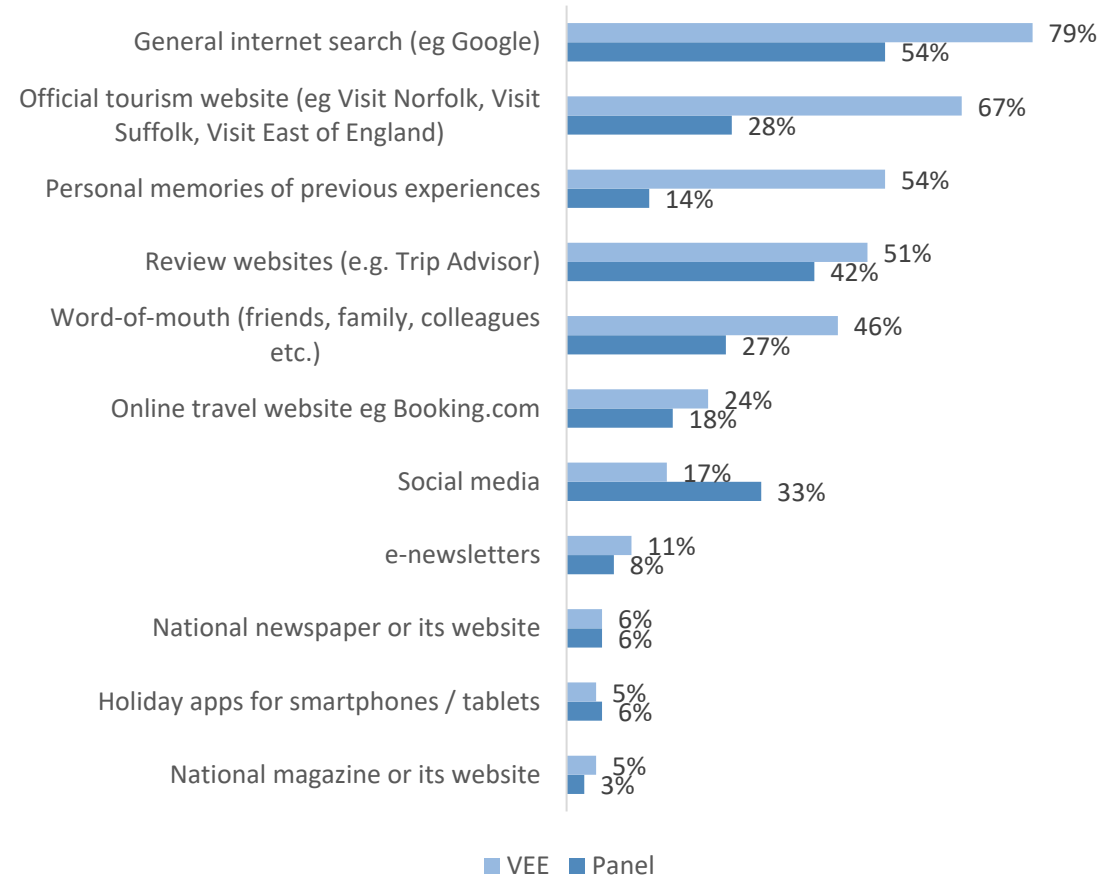
Segmentation – Information sourcing and communication – Media Segmentation

A general internet search (e.g. Google) was the most popular method of obtaining information when planning a holiday / break / day trip, regardless of the source of respondents.

Three quarters (67%) of VEE respondents also rely on official tourism websites and half (51%) use review sites such as Trip Advisor.

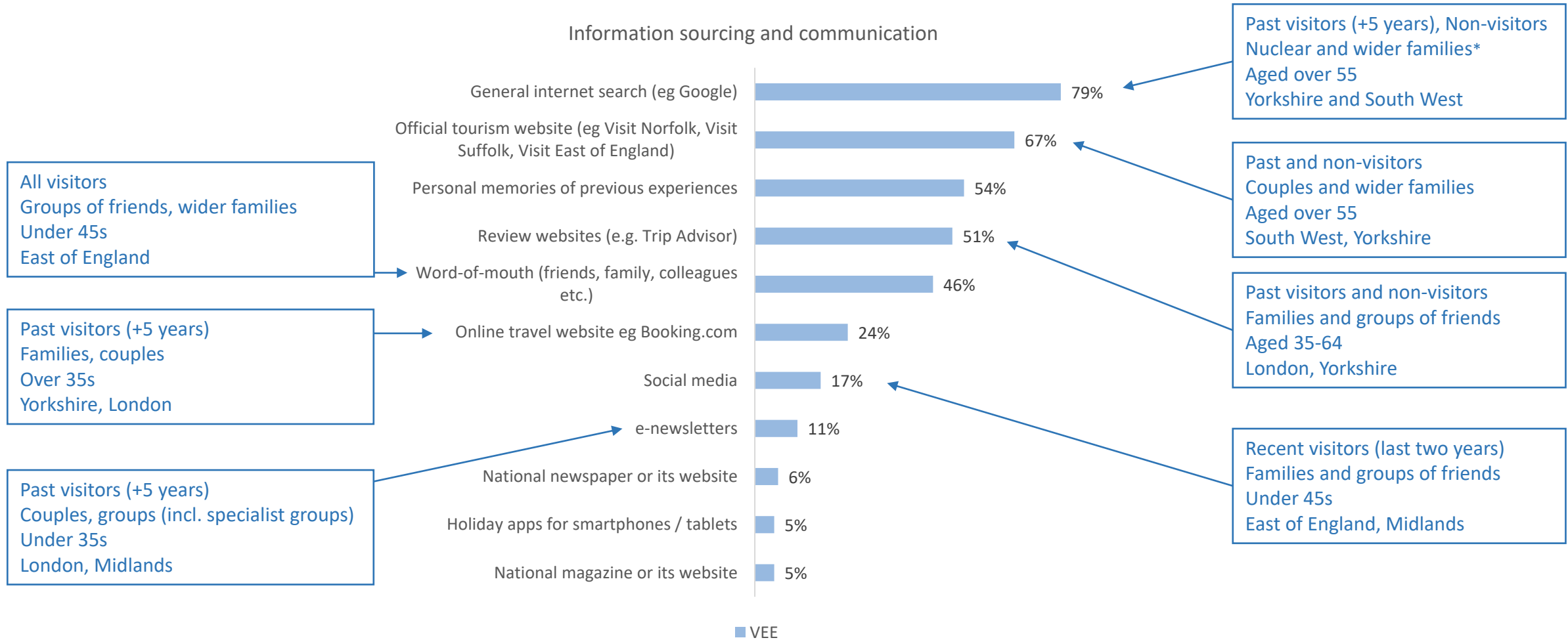
Overall, online panel respondents rely less on personal memories and official tourism websites, compared to VEE respondents. However, they are keen users of review sites and of social media, with a third (33%) turning to the latter source for information when planning a holiday / break / day trip (compared to only 17% of VEE respondents).

Information sourcing and communication



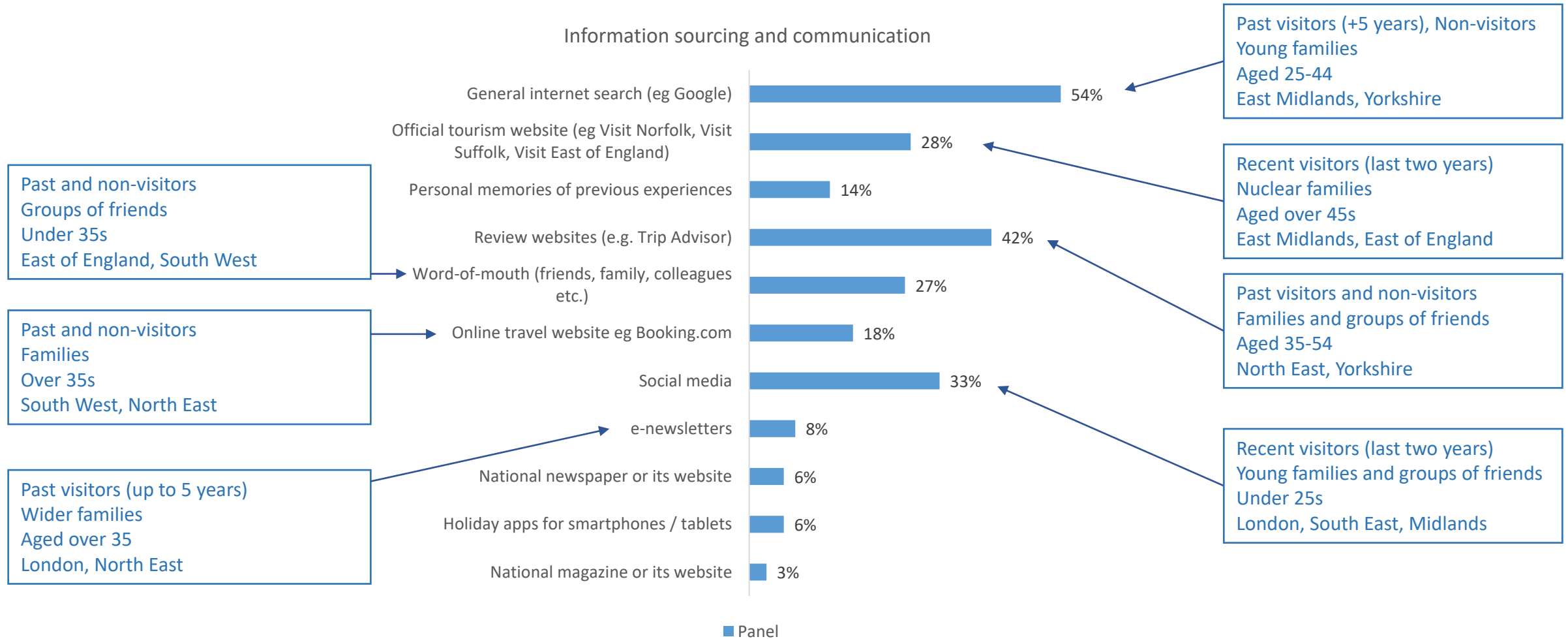


Segmentation – Information sourcing and communication – Media Segmentation - VEE dataset





Segmentation – Information sourcing and communication – Media Segmentation - Online Panel





Research Outputs – Understanding destination choice

Visitors to the East of England

- Were other destinations considered?
- Which UK destinations were considered?
- Why did you choose the East of England?

Non-Visitors to the East of England

- Ever considered visiting the East of England?
- Which destinations were considered?
- Where did you go instead?

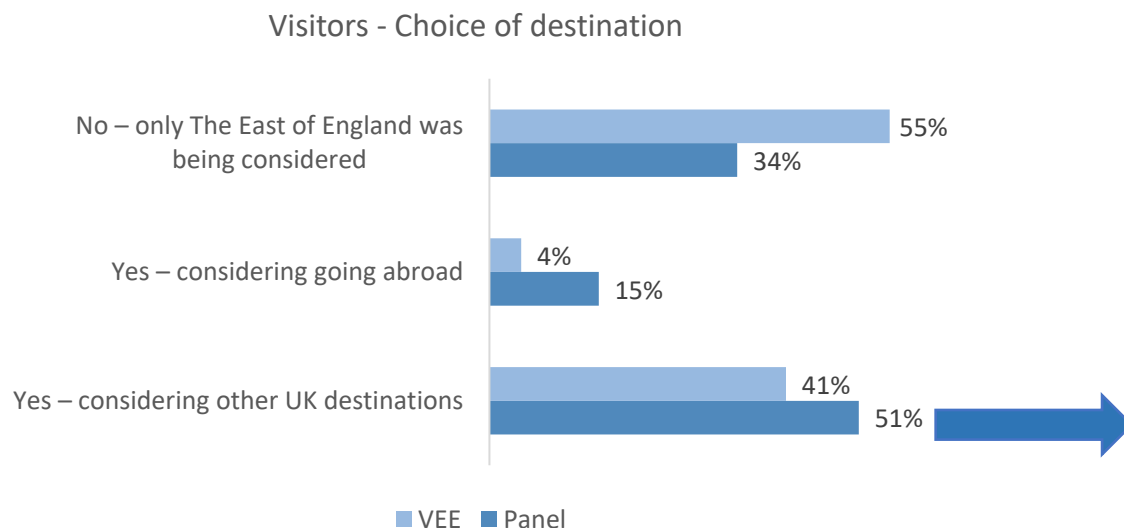




Research Outputs – Understanding destination choice – Visitors to East of England

The last time people decided to visit the East of England for leisure, over half (55%) of VEE respondents and 34% of online panellists were only considering the East of England. However, 41% of VEE respondents and 51% of panellist also considered other UK destinations.

Overall, other UK destinations considered by VEE dataset respondents include Yorkshire, Cornwall, Devon and Dorset. Online panellist considered Cornwall, the Lake District and Devon.



Destinations considered	VEE	Panel
Cornwall	13%	21%
Devon	13%	16%
Dorset	13%	9%
Essex	3%	8%
Kent	7%	6%
Lake District	11%	20%
Northumberland	9%	9%
South East Coast (e.g. Isle of Wight, Brighton)	9%	9%
Yorkshire	14%	12%



Research Outputs – Understanding destination choice – Visitors to East of England

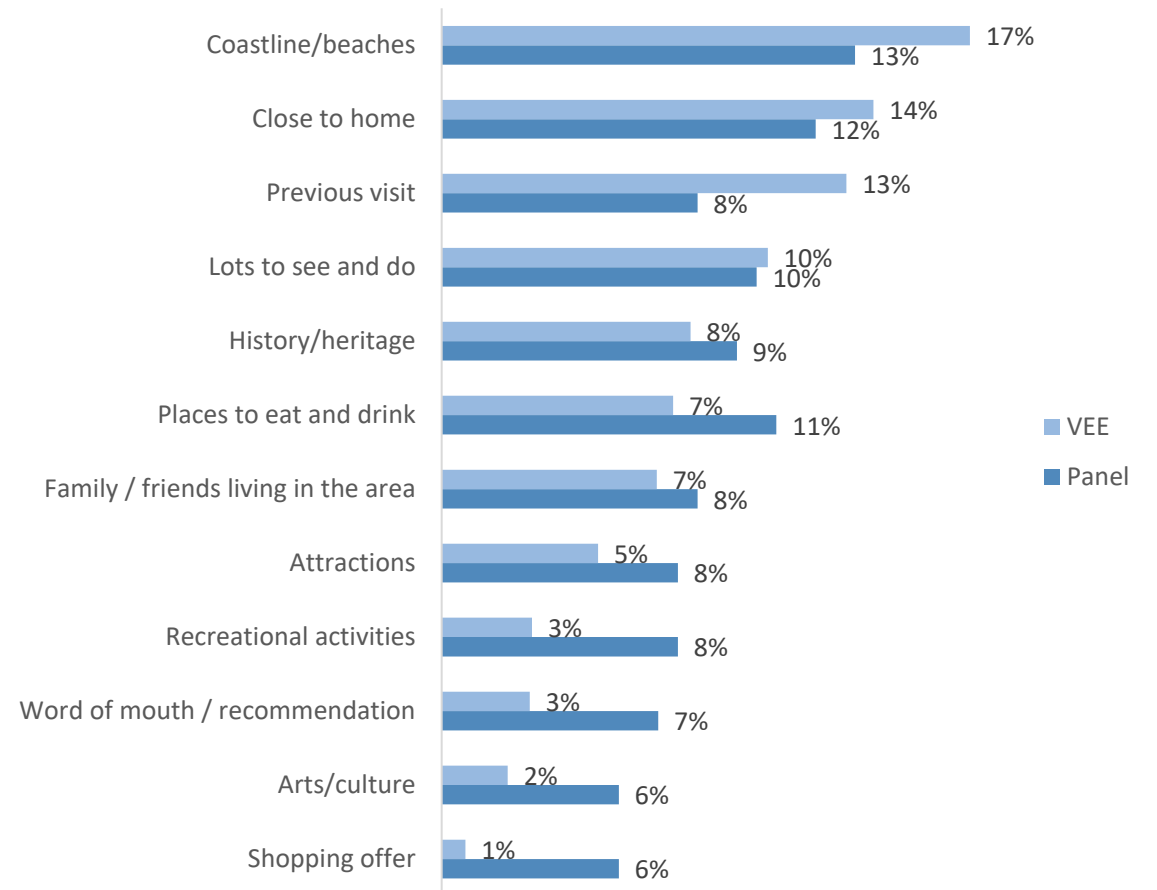
VEE visitors to the East of England chose to visit this area because of the coastline and beaches as well as for the variety of things to do.

Being close to their home and the fact that the area bring memories from previous visits were also important factors when choosing to visit for a leisure trip.

Online panellist gave proportionally more importance to the region’s history and heritage and to the variety of places to eat and drink.

Recreational activities, shopping opportunities and tourist attractions were also key reasons given by online panellists for visiting the East of England.

Why did you visit East of England





Research Outputs – Understanding destination choice – Non-Visitors to East of England

Just under a third (30%) of VEE respondents and three in five (59%) panel respondents did not consider the East of England as a potential destination for a short break.

Under half (45%) of VEE respondents chose another UK destinations, particularly Devon, Yorkshire and Cornwall.

Three quarters (77%) of panellist chose to visit elsewhere in the UK, with Cornwall, the Lake District and Yorkshire being the preferred choices, followed by Devon and Dorset.

Considered a short break to East of England	VEE	Panel
No	30%	59%
Yes	70%	41%

Destination choice	VEE	Panel
No – didn't go anywhere	46%	15%
No – went abroad instead	10%	8%
Yes – chose another UK destination	45%	77%



Destination	VEE	Panel
Cornwall	7%	9%
Devon	8%	6%
Dorset	4%	6%
Essex	1%	0%
Kent	1%	0%
Lake District	7%	9%
Northumberland	6%	3%
South East Coast (e.g. Isle of Wight, Brighton)	5%	3%
Yorkshire	7%	9%



Perceptions of the East of England – Understanding perceptions and motivations to visit

- the East of England appeal as a tourism destination
- What might make the East of England more appealing as a tourism destination
- the East of England appeal compared to other tourism destinations
- Counties most liken to the East of England
- Likelihood of visiting the East of England in the future
- Likelihood of recommending the East of England to others
- Considerations over not visiting or visiting more frequently





Perceptions of East of England – Understanding East of England associations

Respondents were asked to identify the top three attributes they associate with the East of England.

VEE respondents selected maritime attributes such as beaches, coastline and seaside resorts, followed by Historical/Heritage/Country Estates and walking and cycling activities.

Panel respondents also identified the coastline, beaches and seaside resorts as key attributes but, as seen previously, they also see the region as being family friendly, with many family visitor attractions. They also highlight events, festivals and outdoor activities as well as shopping. Finally, they associate the region with offering luxury and being touristy.

This would suggest that promoting the East of England using attributes selected by the online panel sample might attract a younger life stage audiences.

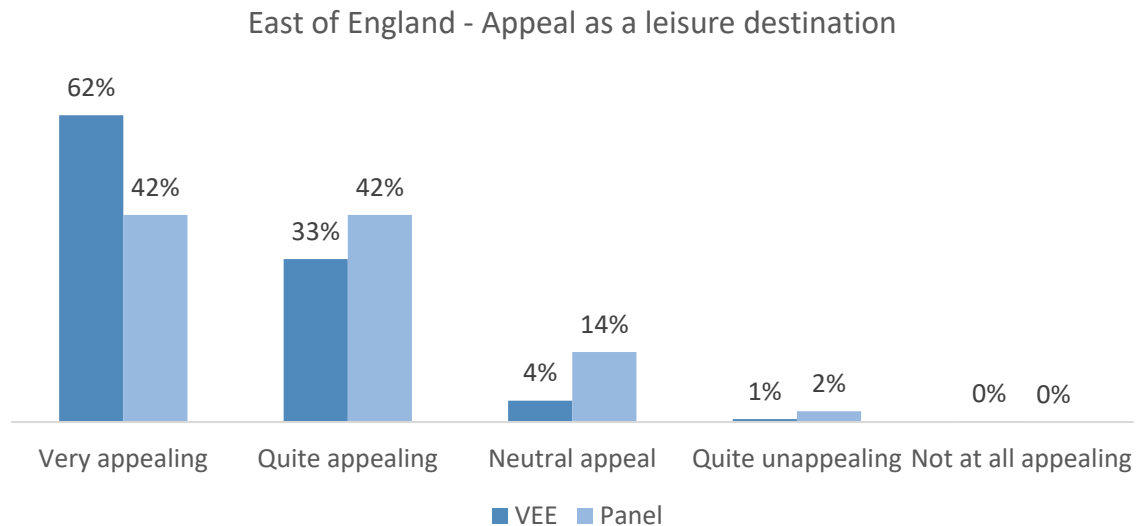
Attributes	VEE	Panel
Beaches / coastline	90%	64%
Seaside resorts	60%	40%
Attractive countryside / Open spaces	52%	23%
Historical/ Heritage / Country Estates	48%	26%
Walking and cycling	45%	41%
Family friendly	31%	43%
Broads National Park	28%	14%
A range of gardens to visit	23%	23%
Touristy	16%	43%
Gourmet pubs/ restaurants	16%	8%
Easy to get to	15%	17%
Local produce	14%	19%
Events and festivals	13%	22%
Outdoor activities	11%	21%
Arts and Culture / Museums and Galleries	9%	12%
Family Visitor Attractions	9%	27%
Value for money	8%	11%
Shopping	5%	20%
Luxury	3%	16%
Golf	1%	4%
Vineyards	1%	5%
Industrial	1%	2%



Perceptions of East of England – Understanding destination appeal

The East of England achieves different levels of appeal depending on the source of responses. Three in five (62%) VEE visitors found the East of England as being very appealing and a further 33% thought the region was quite appealing.

This compares to 82% of online respondents who found the East of England quite appealing (42%) or very appealing (42%).

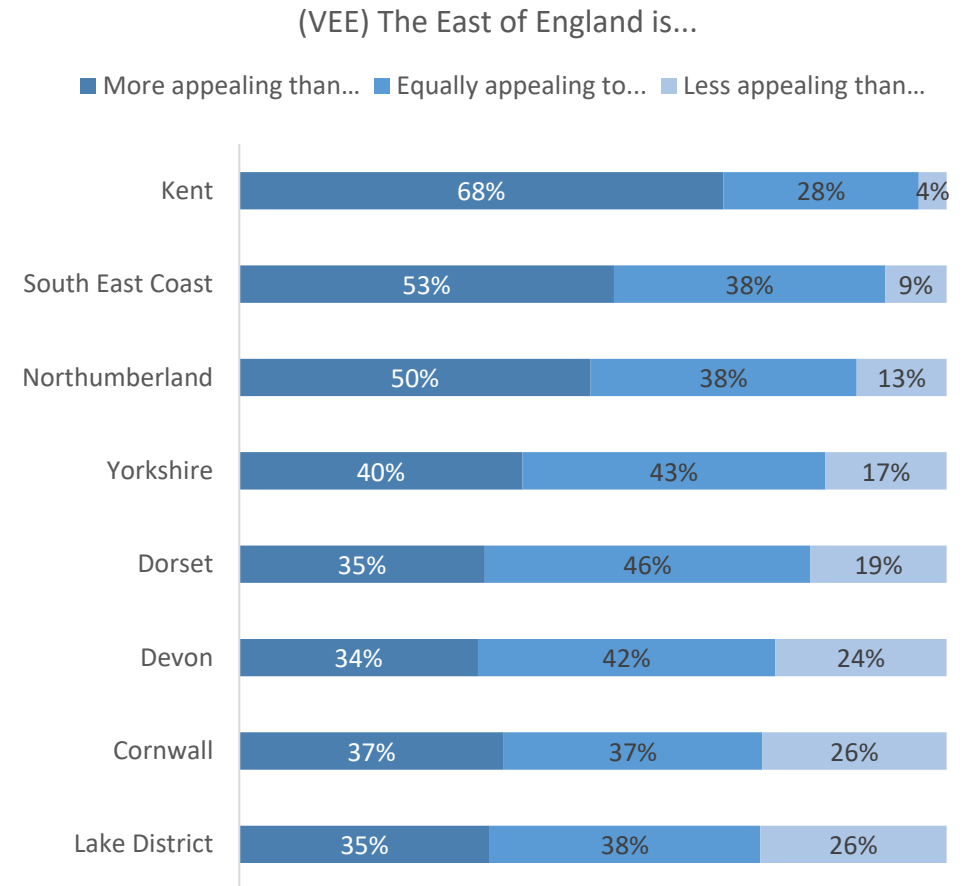




Perceptions of East of England – Understanding destination appeal – VEE dataset

We asked visitors how appealing they found The East of England as a holiday destination, compared to other areas in the UK. Overall, VEE respondents believe that the East of England as a tourist destination is more appealing than Kent, the South East coast and Northumberland.

The region as a tourist destination is slightly less appealing than Yorkshire and Dorset and considerably less appealing than Devon, the Lake District and Cornwall.





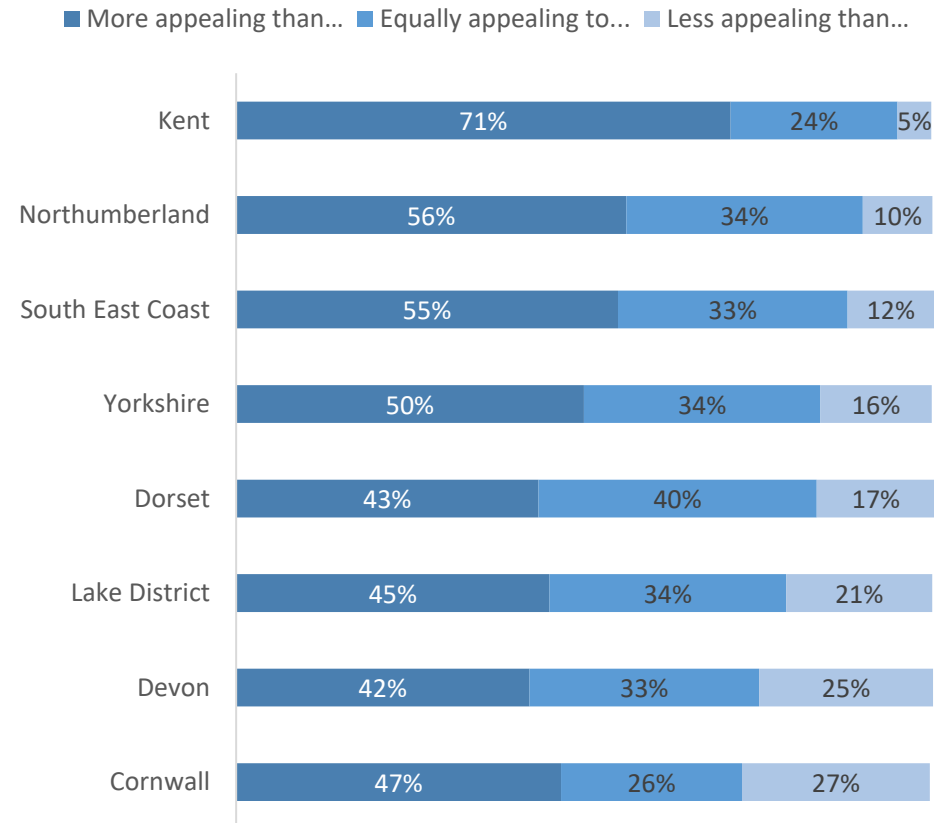
Perceptions of East of England – Understanding destination appeal - Online Panel

Similarly, we asked online panellist how appealing they found the East of England as a holiday destination compared to other areas in the UK.

Overall, (as was the case with VEE respondents) panellist found the East of England more appealing than Kent, Northumberland and the South East coast. Half of respondents think the East of England is more appealing than Yorkshire (50%) but the other half think it is equally (34%) or less appealing (16%).

The East of England as a tourist destination is less appealing than Dorset, Devon, the Lake District and Cornwall.

(Panel) The East of England is...





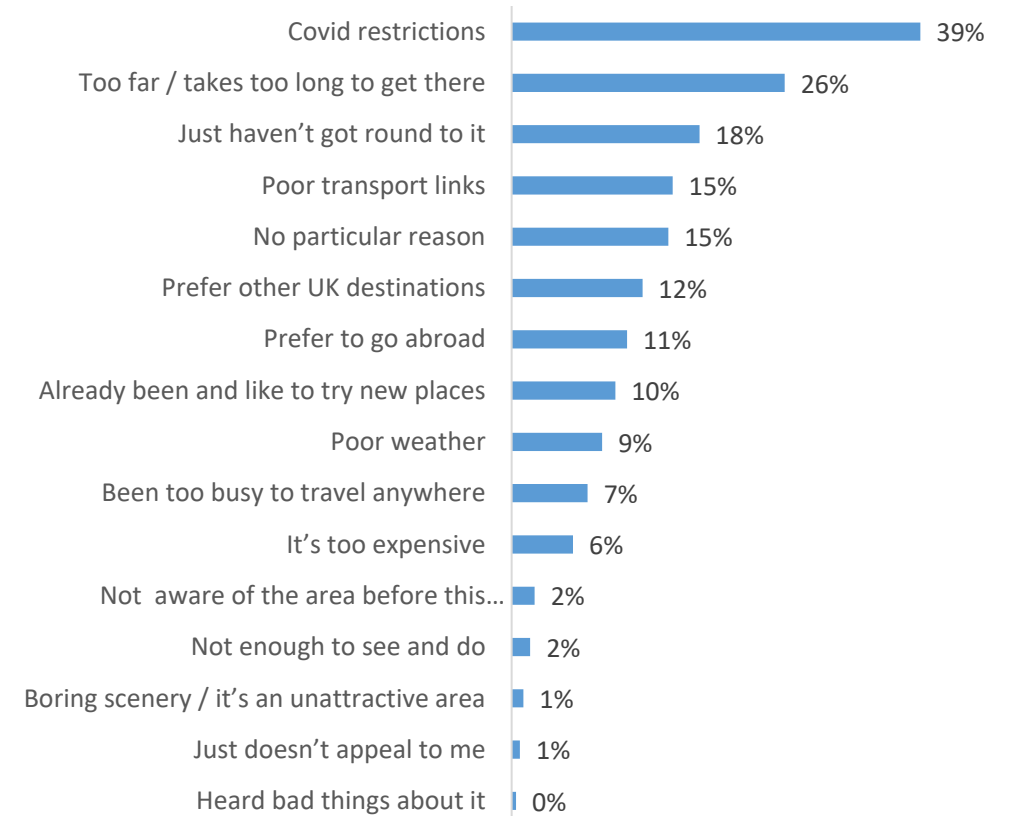
Perceptions of East of England – Understanding motivations to visit – VEE dataset

According to VEE respondents, Covid restrictions were a key reason for not visiting the region more often (identified by 39% of respondents). A quarter (26%) said the East of England is too far away and that they prefer to either visit other UK destinations (12%) or to go abroad instead (11%).

About half (49%) were unable to provide a specific reason relating to the region itself. This includes respondents who said 'Just haven't got round to it' (18%), 'no particular reason' (15%), 'been too busy to travel anywhere' (7%) or 'poor weather' (9%). This would indicate that these visitors do not reject the idea of visiting the East of England again or more often. Raising awareness of the area is likely to give some of these respondents a reason to visit the region in the future.

Key deterrents include a sense that the East of England has poor transport links (15%), that it is too expensive (6%), that there's not enough to see and do (2%) and that it's boring or unattractive (1%). Raising awareness of the area might help change some of these negative perceptions.

VEE - Reasons for not visiting (more often)





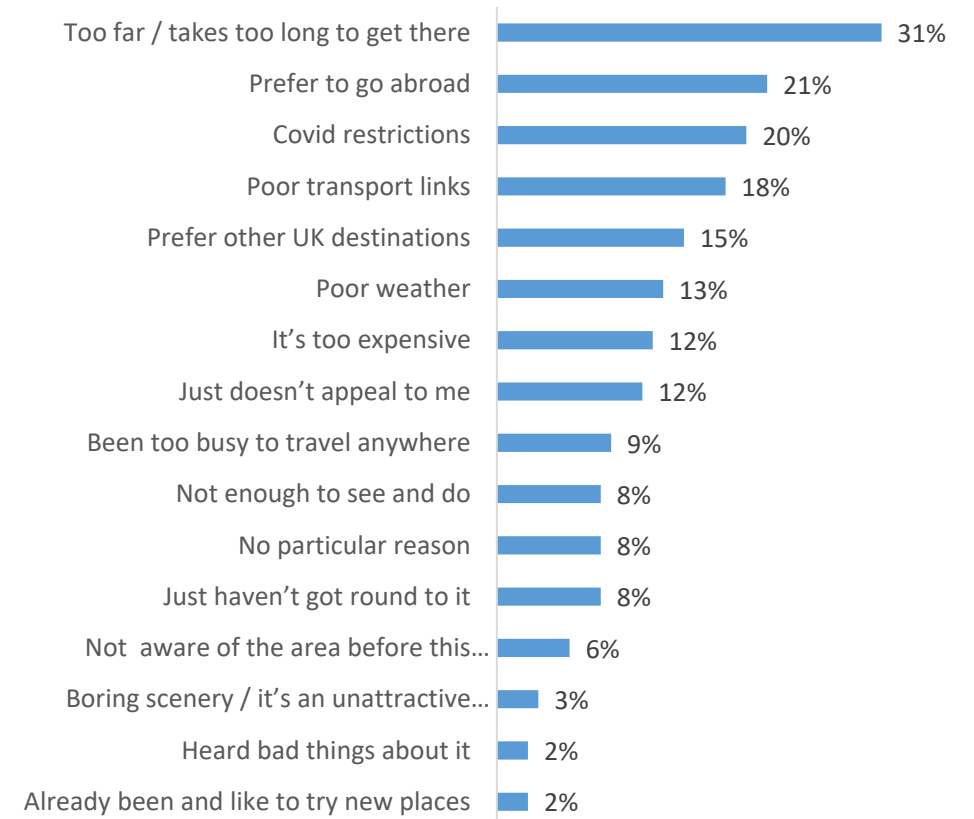
Perceptions of East of England – Understanding motivations to visit – Online Panel

Turning to online panellist, three in ten (31%) feel the region is too far a way and that it takes too long to get there. One in five (21%) prefer to go abroad and 15% prefer to visit other UK destinations. Covid restrictions were less of an issue compared to the VEE respondents (identifies by only 20% of panellist).

Two in five (41%) were unable to provide a specific reason relating to the East of England itself. This includes respondents who said ‘poor weather’ (13%), ‘just haven’t got round to it’ (12%), ‘been too busy to travel anywhere’ (9%) and ‘no particular reason’ (8%). Again, this would indicate that these respondents do not reject the idea of visiting the region in the future. Raising awareness of the area is likely to give some of these respondents a reason to visit in the future.

Key deterrents include poor transport links (18%), it’s too expensive (12%), that it lacks appeal (12%) and that there’s not enough to see and do (8%).

Panel - Reasons for not visiting (more often)

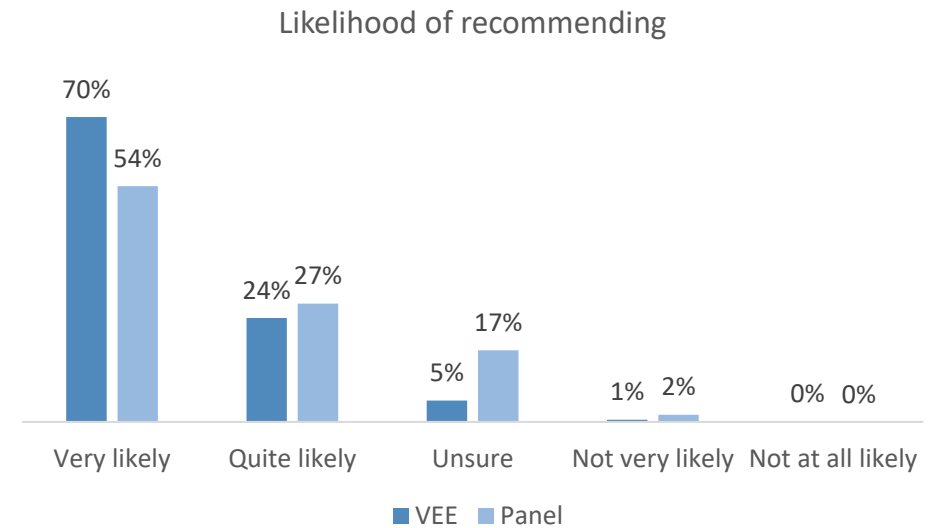
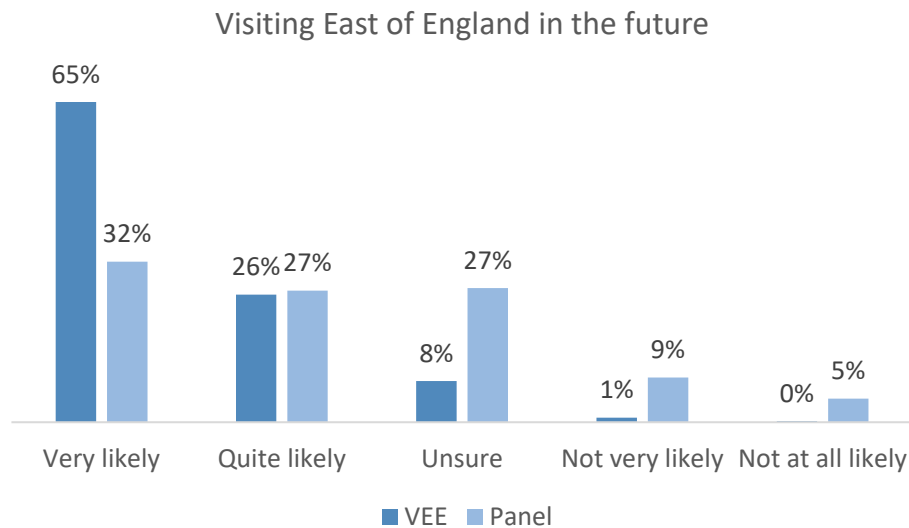




Perceptions of East of England – Willingness to visit and to recommend

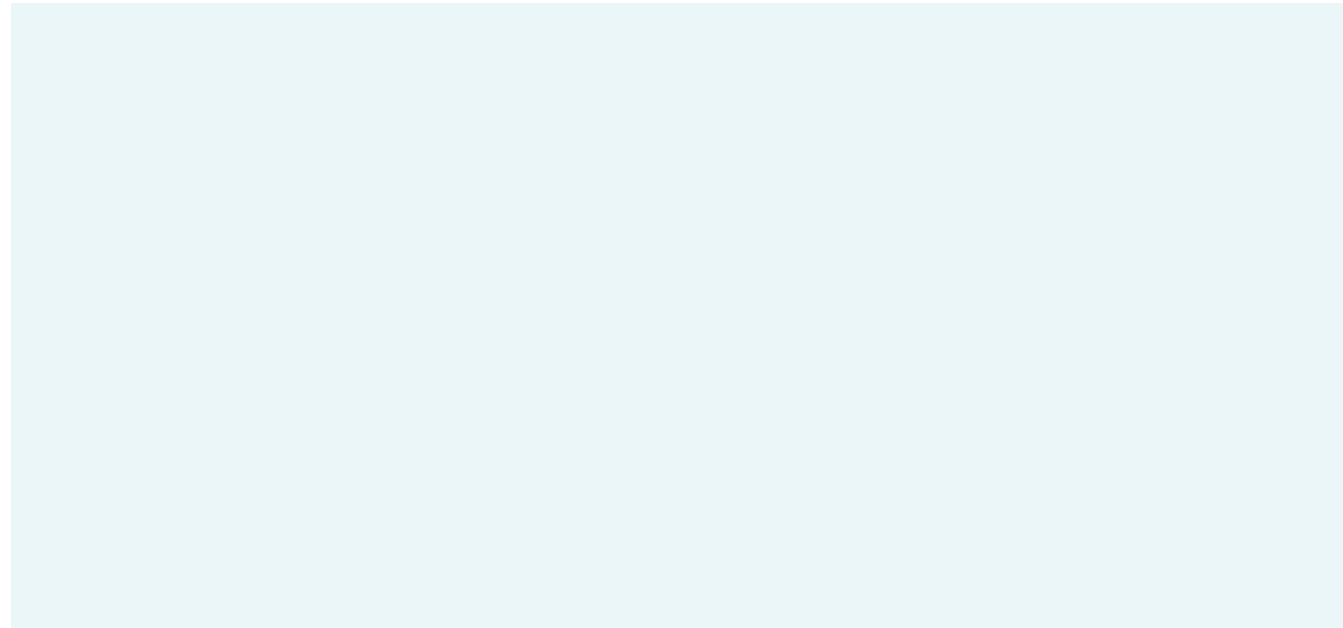
Nine out of ten (91%) VEE visitors are very likely (65%) or ‘quite likely’ (32%) to visit again in the future. This compares to 59% of online panellists. However, it is worth noting that more than a quarter (27%) of panellist were uncertain about a future visit, meaning that they don’t oppose the idea of visiting the East of England in the future.

Visitors were asked to rate their likelihood of recommending the East of England to others. It is encouraging to see that 94% of VEE respondents likely (24%) or very likely (70%) to recommend the region to others, whilst 81% of panellists are likely to do so.





Summary of results and Key take-outs





Key take-outs

- There are some differences in the composition of visiting groups. Younger adults and families are predominant among panellists. Older couples were the more dominant groups within the VEE dataset.
- The region is well known for its maritime features, including the beach, the coastline and seaside resorts. Younger adults and families are more interested in outdoor activities, family attractions and shopping opportunities. Respondents from the VEE dataset are more interested in historical, heritage and country Estates as well as walking and cycling activities.
- Evidence suggests there might be a perceived problem with transport links and connectivity, particularly for respondents from the online panel. As a results, almost half of panellist found travelling to the region to be inconvenient. As you would expect, distance and perceived travel convenience are major factors when choosing a destination.
- The results would suggest that Visit East of England was successful in enticing their consumer dataset to enjoy longer holiday at home during the pandemic.
- Regardless of data sources, raising awareness of the area might help change some of the negative perceptions associated with the region, including poor transport links, not enough to see and that it's unappealing, boring or unattractive.



Key take-outs

- The region competes well against a number of destinations. Both VEE respondents and online panellists believe the East of England is more appealing than Kent, the South East coast and Northumberland. It more or less matches Yorkshire in terms of levels of appeal. However, all respondents prefer Devon, Dorset, the Lake District and Cornwall as leisure destinations.
- Just under a third (30%) of VEE respondents and three in five (59%) of did not consider the area as a potential destination for a short break. VEE respondents chose Devon, Yorkshire and Cornwall instead with Cornwall, the Lake District and Yorkshire being the preferred choices for online panellists.
- Three quarters (67%) of VEE respondents rely on official tourism websites and half (51%) on review sites such as Trip Advisor. In comparison, online panel respondents rely less official tourism websites but they are keen users of review sites and of social media.
- Promoting the East of England using a range of attributes such as family friendly, family visitor attractions, events, festivals and outdoor activities as well as shopping may entice younger life stage audiences to visit the region.
- Similarly, promoting the region's green and accessibility credentials and other recognised accreditations such as the 'We're Good To Go' is likely to attract new visitors to the area, particularly those not currently engaging with Visit East of England.

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