

# Bournemouth Visitor Survey 2013



## Report & Analysis

UNLOCKING TOURISM POTENTIAL



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We commissioned Bournemouth University to conduct a major visitor survey providing fresh insight into the resort's visitor profile, how and when visitors plan their trips, what they do, how much they typically spend and what they think of the experience.

**The survey's findings make essential reading for Bournemouth's tourism businesses.**



## Need to know:

**Sample Size:** 1,120

**Methodology:** Self completion paper survey, handed out to randomly selected visitors on the seafront and in the Lower Gardens

**Fieldwork period:** 13 May 2013 - 2 November 2013

## Breakdown into key time periods:

> Before the school summer holidays

13 May – 22 July 2013 (257 interviews)

> During the summer holidays

4 August – 2 September 2013 (506 interviews)

> After school summer holidays

3 September – 2 November 2013 (357 interviews)



## Contents:

1	Visitor profile.....	7
	Who are Bournemouth's visitors?	
	General profile.....	8
	Day visitor profile.....	13
	Staying visitor profile.....	14
	Staying visitor (outside Bournemouth) profile.....	15
	Where are they staying?.....	16
	Profile variations by time of visit.....	17
2	Planning and motivation.....	19
	How do they typically plan and book their trip?	
	What makes them choose Bournemouth?	
	Timing of decision to visit.....	21
	Sources of information & trip motivations.....	22
3	Visitor spend.....	25
	How much do they typically spend during their trip, and on what?	
4	Experience and satisfaction.....	29
	What do they do during their trip and what do they think?	
	Activities taken part in during the trip.....	30
	Who are the most satisfied visitors?.....	32



## Insights, challenges and opportunities

We want to make sure this research can make a difference to your business, so each section of the report includes a set of thought-provoking challenges for businesses.

Icons indicate insight of particular relevance for:



Hotels



Bars & restaurants



Visitor attractions in general

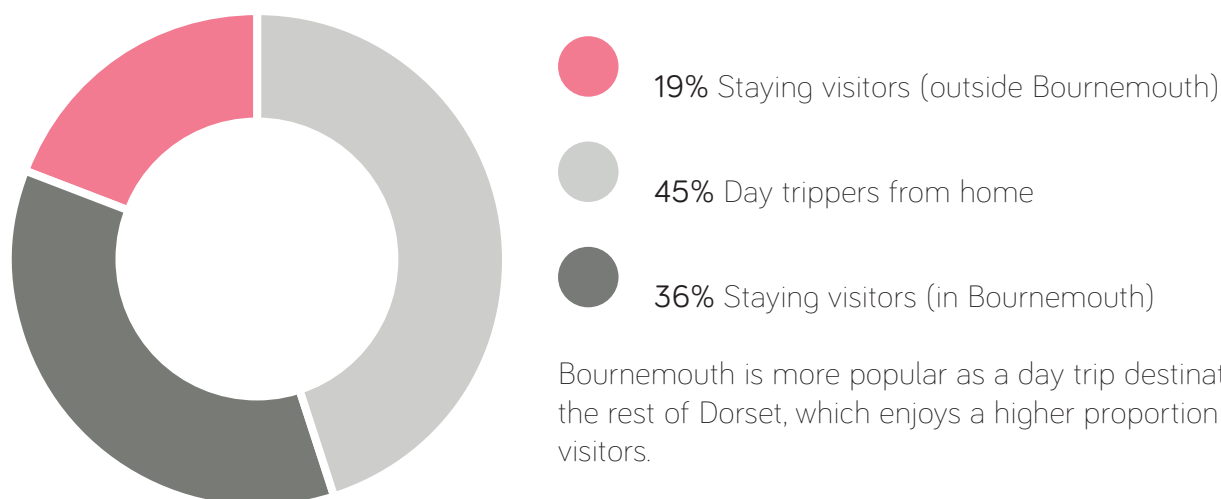


Who are Bournemouth's  
Visitors?

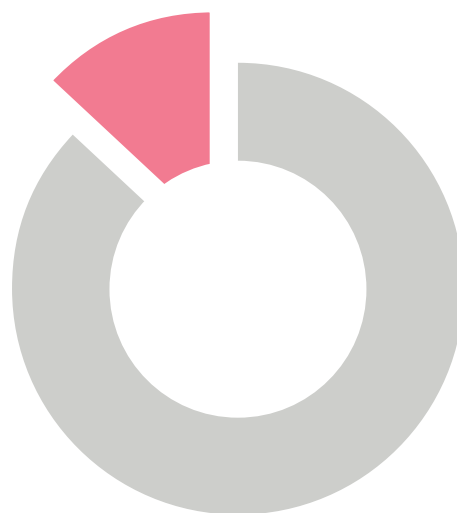
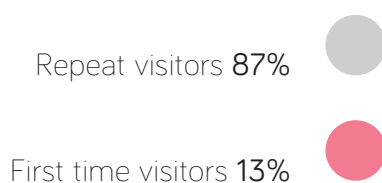
1  
Visitor profile

## Who are Bournemouth's visitors?

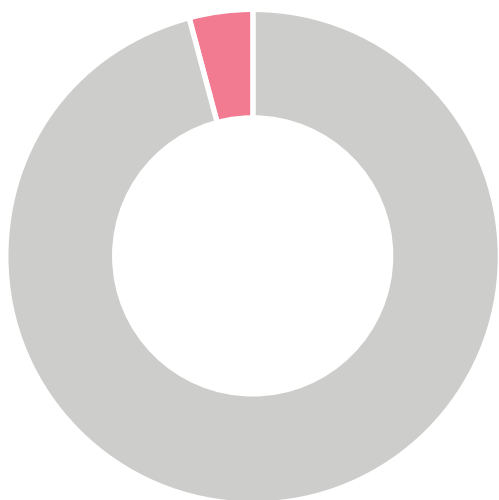
The majority are day trippers – annually only 15% are staying visitors, although they spend around £170 more per trip and contribute well over half of annual visitor spend. In peak season the proportion of staying visitors (in Bournemouth) typically rises to just over a third, as shown below. Day trippers travel further to get here than the average for domestic trips (43 miles on average), and staying visitors travel 113 miles on average, mostly from London and the home counties. Most have been before - only 13% were on their first visit. Most are couples or families - only 4% were visiting Bournemouth alone. Almost 60% visiting in the summer holidays were families, while in the autumn more are couples, and more likely to be older “empty nesters”. Bournemouth has a slightly more ‘upmarket’ profile than the average English seaside destination, with a good spread of social grades. If staying, the vast majority are on a bed and breakfast basis, for an average of 4 nights. The beach is what motivates most visits – the deciding factor for 88% of first time day trippers and 71% of first time staying visitors in 2013. First-timers are less likely to be satisfied with their experience however - the more you visit, and the longer you stay, the more satisfied you become.



## First timers vs repeat visitors







## Where are they from?

- 96% Holiday visitors from the UK
- 4% Holiday visitors from other countries (30% of these from Germany)

Most UK visitors are from London, the Home Counties and the M3 corridor.

Day trip from home ●

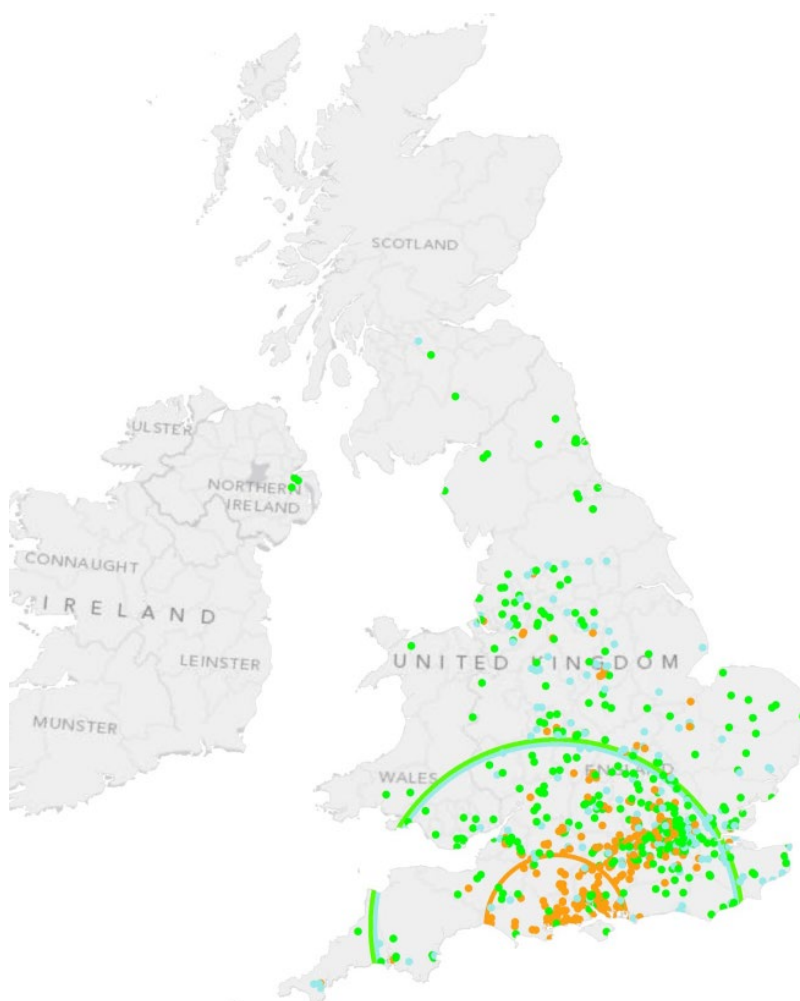
Staying visitor in Bournemouth ●

Staying visitor outside of Bournemouth ●

Day-trip MD = 69km —

Stay-trip from outside Bournemouth  
MD = 178km —

Stay-trip inside Bournemouth  
MD = 182km —

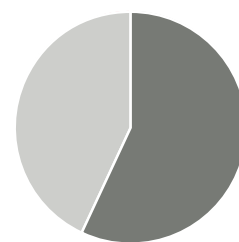


Bournemouth has a slightly more 'upmarket' profile, compared to the average for English seaside destinations, although the highest proportion of visitors were still C2DE - this reflects the national picture, with trips to seaside destinations more likely to be made by those from lower social grades

(42% made by C2DE vs 34% for trips overall)

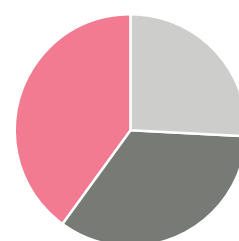
### Sex (overall)

57% Female  
43% Male



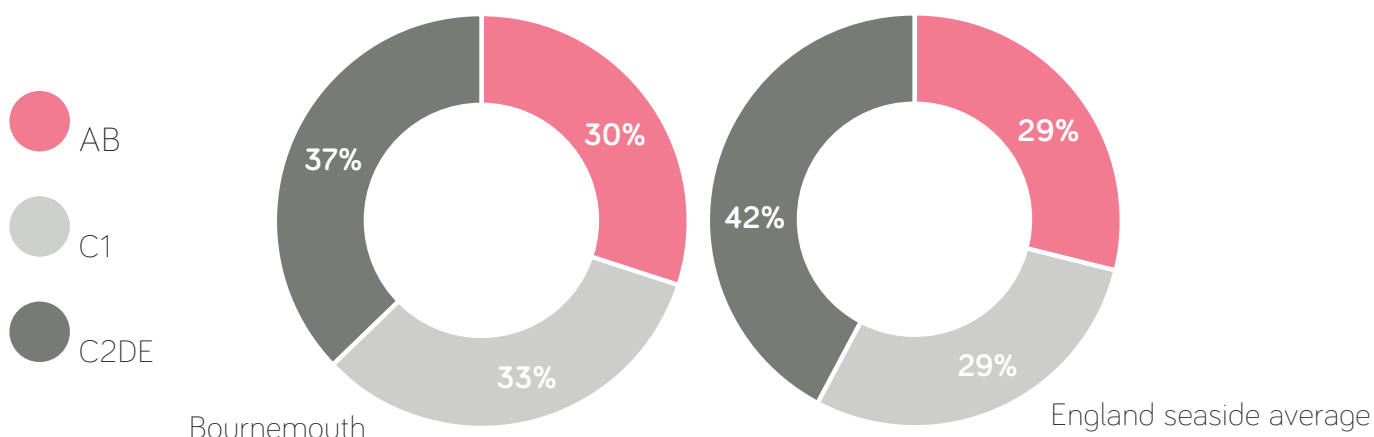
### Age (overall)

34% aged 18-34  
40% aged 35-54  
26% aged 55+



Most common age group of visitors surveyed: 35-44 (20%)

### Socio economic group (overall)



## How long are staying visitors staying?

4.6 nights is the average length of stay.

Shorter than the rest of Dorset, where the average length of stay is 6.72 nights.

## What type of trip are they on?

45% are on a holiday  
(more than 4 nights)

More visitors are taking a longer holiday in Bournemouth than other English seaside destinations, where on average 32% are on a holiday of 4+ nights, but significantly fewer than the rest of Dorset where 57% are on holiday rather than a short break.

39% are on a short break  
(less than 4 nights)

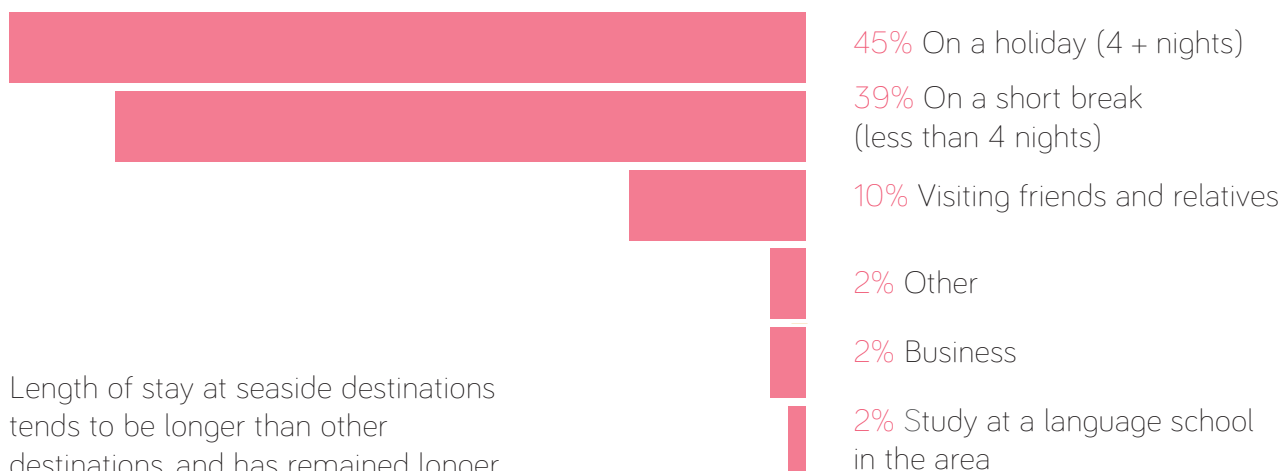
Short breaks are more prevalent in Bournemouth than the average English seaside destination at 27% - the rise of multiple short breaks continues apace post economic downturn, due to concern about being away for too long, risk aversion and increased need to take a break from reality - a significant opportunity if the deals are right and your marketing makes you easy to find and book with short notice.

10% are staying with friends and relatives

6% are staying for other purposes (business, study etc)

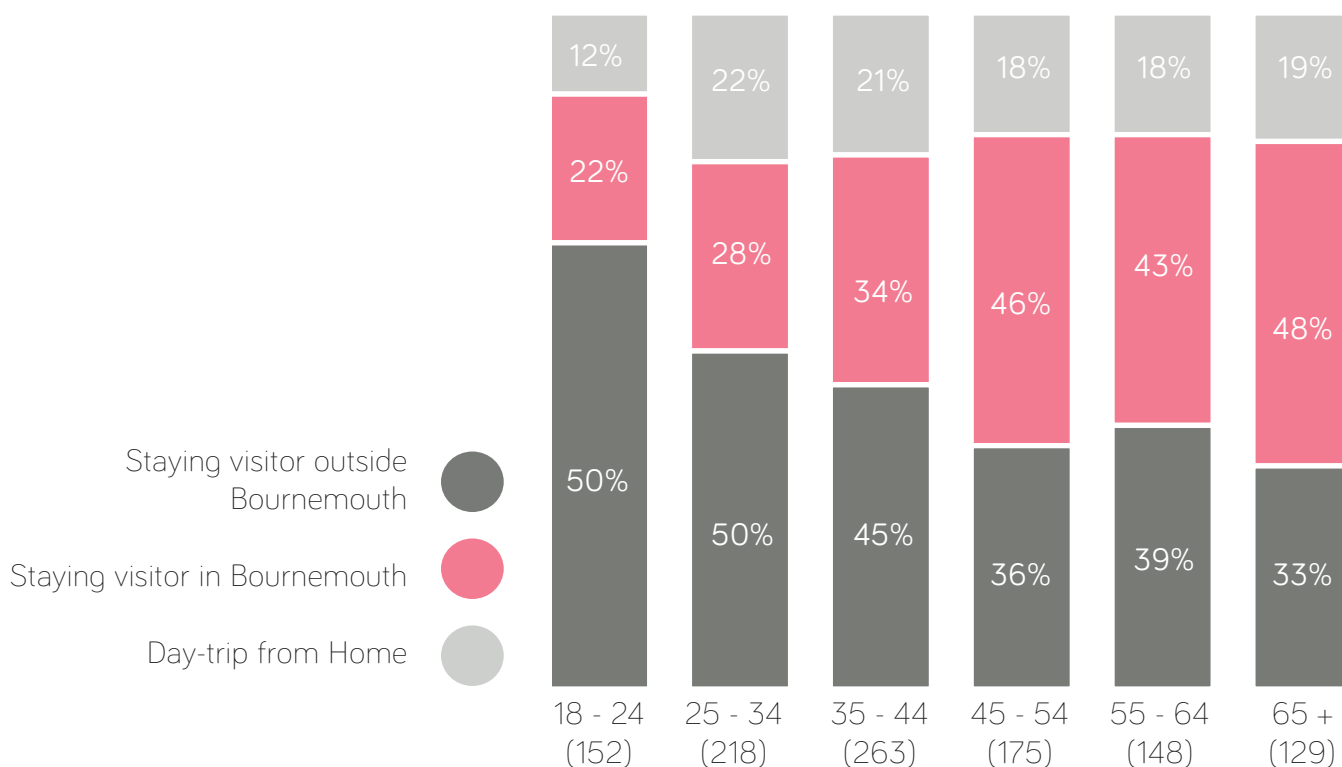


## Type of staying trip



Length of stay at seaside destinations tends to be longer than other destinations, and has remained longer when the market overall has shortened trip lengths – the proportion of staying visits of **4+ nights** at seaside destinations has remained at **2/3rds** since **2006**, whereas overall this has declined from **47%** to **43%**. In Bournemouth, as in other coastal resorts, people travel further and are more likely to stay longer, but marketing must emphasise the variety of experiences available in the wider area, and the appeal of the resort as a base.

## Type of visit by age of respondent (%)



## How does the profile differ by type of visit?

45% are on a day trip from home

### Indicators:

- > Mostly from the M3 corridor, travelling an average distance of 42 miles
- > 86% arrive by car
- > 55% made the decision to visit on the day of their visit and a further 39% within the week before. Those visiting in a family group are more likely to make the decision before the day of the visit
- > 76% visit Bournemouth more than once a year – only 8% were visiting Bournemouth for the **first time**.
- > 45% were under 34, 21% were over 55
- > 48% are families
- > 33% are couples
- > Less likely to take short breaks and holidays in the UK
- > 26% AB, 31% C1, 42% C2DE - a less 'upmarket' visitor profile



### Insight:

A growing segment! From 1,306m trips in 2011 to 1,467m trips nationally in 2012 – day trips from home are an important opportunity with the general recent decline in holiday trips abroad and an increasing societal shift towards 'all things local'. In Bournemouth, there were over 750,000 more day visits in 2012 than the previous year. Characterised by a younger profile, a significant proportion (45%) are 'Generation Y' (or 'Millennials' – those born between 1980 and 2000). Tech-savvy and open to deals and discounts via smartphone that may convert them to staying visitors, this group are no less demanding and understanding their world is key to growth. Rather than fill in comment cards, they will vote with their fingers, rating your business online and entering conversations via social networks. What's trending in their worlds? Where else are they talking about? Marketing needs to focus on variety of experiences, with the message that there is also a Bournemouth beyond the beach (and therefore more reason to return as a stay visitor).

# 36% are Staying Visitors (in Bournemouth)

## Indicators:

- > Mostly from London and the Home Counties but some from further afield, travelling an average of 113 miles
- > Significantly more likely to be on a short break of less than 4 nights
- > 63% in hotels, guest houses or B&Bs (where are they)
- > 23% staying with friends and relatives
- > 41% made the decision to visit Bournemouth within the last week, only 20% made the decision more than 2 months ago
- > 18% were first time visitors to Bournemouth - 46% visit more than once every year
- > 25% are under 34, 33% are over 55
- > 31% are families
- > 46% are couples
- > More likely to take short breaks and holidays in the UK
- > 32% AB  
34% C1  
34% C2DE – a mid-market profile

## Insight:

Bournemouth's staying visitors are more likely to be on a short break than the rest of Dorset (where visitors are more likely to be on a longer holiday), but it's less popular as a short break destination than England as a whole. Clearly, an important challenge is encouraging longer stays by promoting the appeal of Bournemouth as a base. More families, for example, could be encouraged to stay in Bournemouth to explore the surrounding area, rather than staying in Dorset or the New Forest and visiting Bournemouth only for a day on the beach (and joining the jams on the A338). Staying visitors are more likely to be older couples ('empty nesters'), possibly with less inclination to explore, and this is also truer for Bournemouth than for the average English seaside destination. In common with the national picture, a significant proportion are late bookers, deciding to visit only within the week before the trip, preferring to defer the decision until budgets are certain, or because of a deal-seeking mentality ingrained in the economic downturn. The appeal of the beach is considerable for first time visitors - 71% cited the beach as their reason for choosing Bournemouth, but how many of them are aware of the variety of beach options in the wider area deserving of a longer stay?

**Almost a quarter stay with friends and relatives - making Bournemouth's own residents a hidden opportunity for businesses.**

# 19% are Staying Visitors (outside Bournemouth)

## Insight:

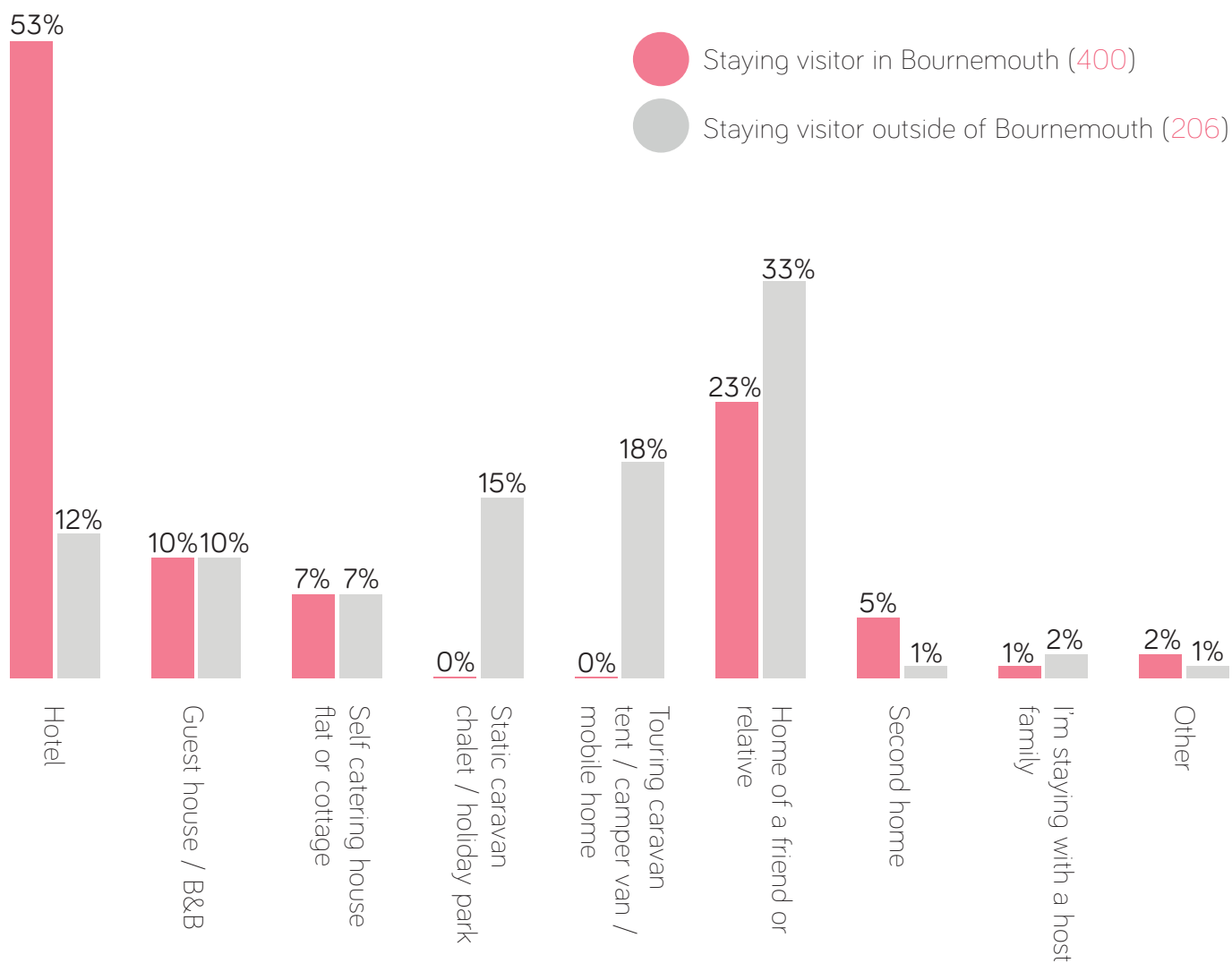
## Indicators:

- > Mostly from London and the Home Counties but some from further afield, travelling an average of 110 miles
- > Significantly more likely to be on a holiday of four or more nights compared to visitors who were staying in Bournemouth (52%, 42% respectively)
- > More likely to spend more when in Bournemouth
- > 32% are under 34, 25% over 55
- > A third were staying in a tent or caravan, a third with friends and relatives and 22% in serviced accommodation
- > 18% were first time visitors to the area – 52% visit more than once per year
- > 35% AB  
35% C1  
29% C2DE – a more 'upmarket' profile

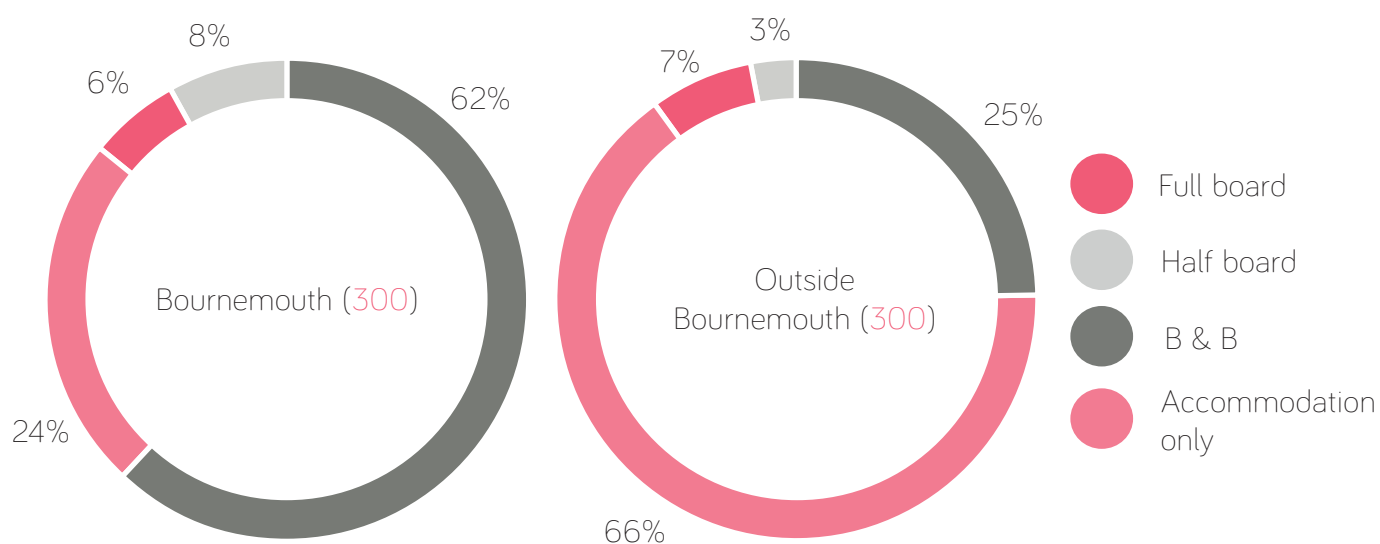
Visitors staying outside Bournemouth and visiting for the day are far more likely to be on a main holiday, and are a slightly more affluent crowd than Bournemouth's own staying visitors - spending more when here. They are also far more likely to self-cater, staying in holiday cottages, chalets or camping/caravanning, whereas under a quarter of staying visitors in Bournemouth are on an accommodation-only basis. Offering self-catering accommodation options in Bournemouth itself could have a significant effect on staying visitor numbers and length of stay. There are now cases of small hotels or B&Bs with 10 rooms or less letting their entire properties as holiday lets to larger parties during the quieter off season months, an innovative way of capitalizing on the growing trend for extending 'duty trips' (family occasions, often inter-generational) into longer leisure breaks.



## Where are they staying, by type of visit?



## Type of accommodation





## How does the profile differ by time of visit?

**Before** the summer holidays, visitors are more likely to be:

**Younger** (aged 18-24), on a day trip, spending less while here, less likely to recommend Bournemouth to friends and family

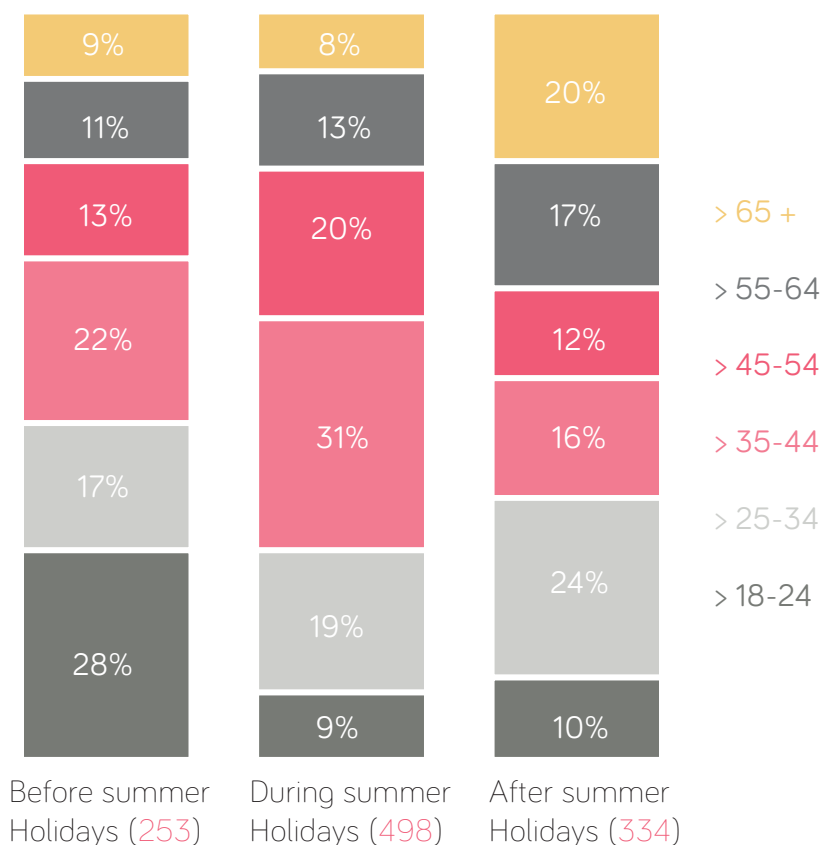
**After** the summer holidays, visitors are more likely to be:

**Older**, in groups or couples, staying in a hotel, on a short break, with a shorter lead time, spending more while here, more satisfied with their experience

**During** the summer holidays, visitors are more likely to be:

**Families**, spending time on the beach, on a longer holiday, with a longer lead time

Age group of respondent by fieldwork period (%)



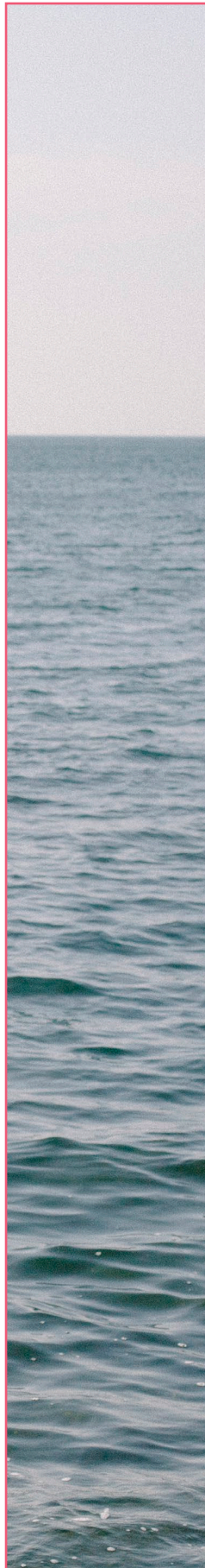
## Challenges & opportunities:



If more visitors to Bournemouth are aged **35-44** than any other age group, how are businesses appealing specifically to this '**squeezed middle**' generation who are '**time poor but willing to treat themselves**', according to research commissioned by VisitEngland? How easy are you to find and book for busy families who typically have shorter purchase journeys and visit fewer websites than pre-family or '**empty-nesters**'?



A family-oriented destination (and business) will be increasingly important as a changing demographic structure nationally means intergenerational breaks will become more popular, as will extending '**duty trips**' into short breaks (weddings, family occasions) where several generations need accommodating together. Is your business flexible and responsive to less traditional family units?



The '**Staycation**' trend is also continuing - 2013 visitors to Bournemouth were significantly more likely to have 5 or more short breaks in the UK (**30%**) than 2009 visitors (**13%**). How could businesses capitalise on this trend by providing inspiration and ideas that convert staycation sceptics and encourage committed staycationers to stay longer?



Bournemouth's staying visitors are older on average, with **33%** classified as '**empty nesters**'. What value-added experiences could you offer to satisfy this group's increasing thirst for unique experiences or '**cultural capital**', where learning new skills or acquiring knowledge is higher on the leisure time agenda?



Older visitors are also becoming more numerous, with the average age of the nation - and '**healthy life expectancy**' - rising rapidly. How well-suited is your business to people with reduced mobility (but not necessarily reduced spending power)?

How do they typically plan and book their trip?

What makes them choose Bournemouth?



# Planning and motivation

## Indicators:

55% of day visitors make their decision to visit the area on the same day as their visit

After the summer holidays, this rises to 80%

34% of staying visitors decide to visit within the week before

22% were most influenced to visit as a result of verbal information from friends and family

11% were most influenced by an accommodation website

9% were most influenced by other websites about the area

6% were most influenced by Bournemouth Tourism's website

84% of all visitors typically use the internet to plan and book a trip

73% of all visitors typically use smartphones to plan and book a trip

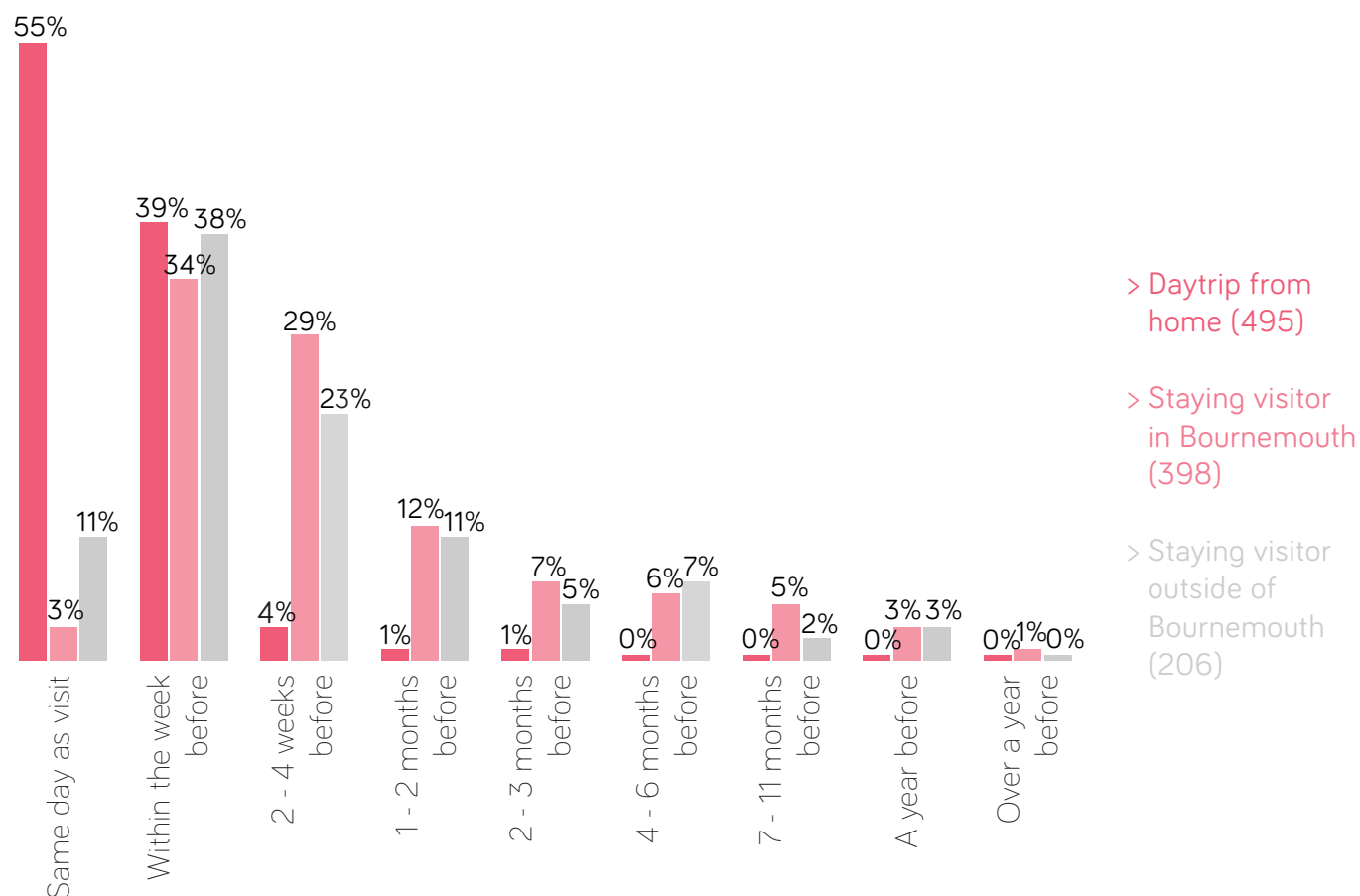
## Insight:

First time day visitors were significantly more likely to make their decision to visit the area within the week before compared to repeat visitors on a day trip.

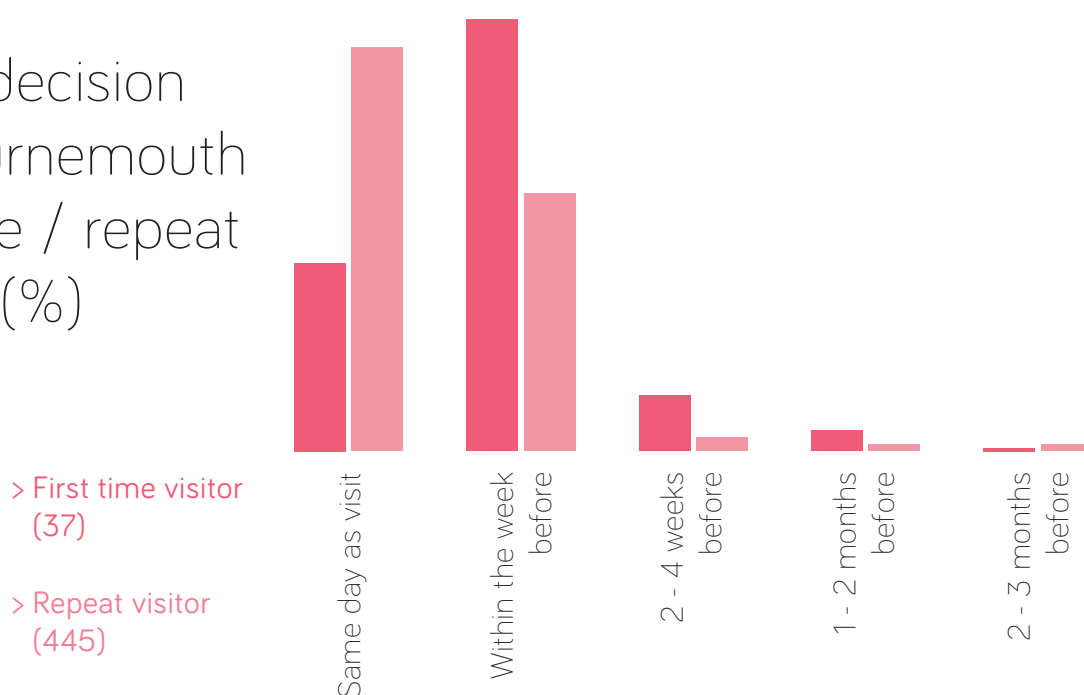
Repeat day visitors were significantly more likely to decide to visit the area on the day of the actual visit.



## Timing of decision to visit by day / stay (%)



## Timing of decision to visit Bournemouth by first time / repeat day visitor (%)





## Where else are they considering?

Brighton is our biggest competition for day visitors

Cornwall & Brighton for staying visitors

## How do they find information?

In general, those aged 25-34 are more likely to plan and book their trip using multiple platforms, whereas those aged over 65 are least likely to use any of the technologies or social media channels listed. Most frequently used are smartphones (73% of all visitors) and the internet (84% of all visitors). Empty nesters (aged 55-64) are still internet-savvy, with 81% using the internet to plan and book a trip, but less likely to use social media, reflecting a tendency to use the internet only for practical tasks rather than for sharing.

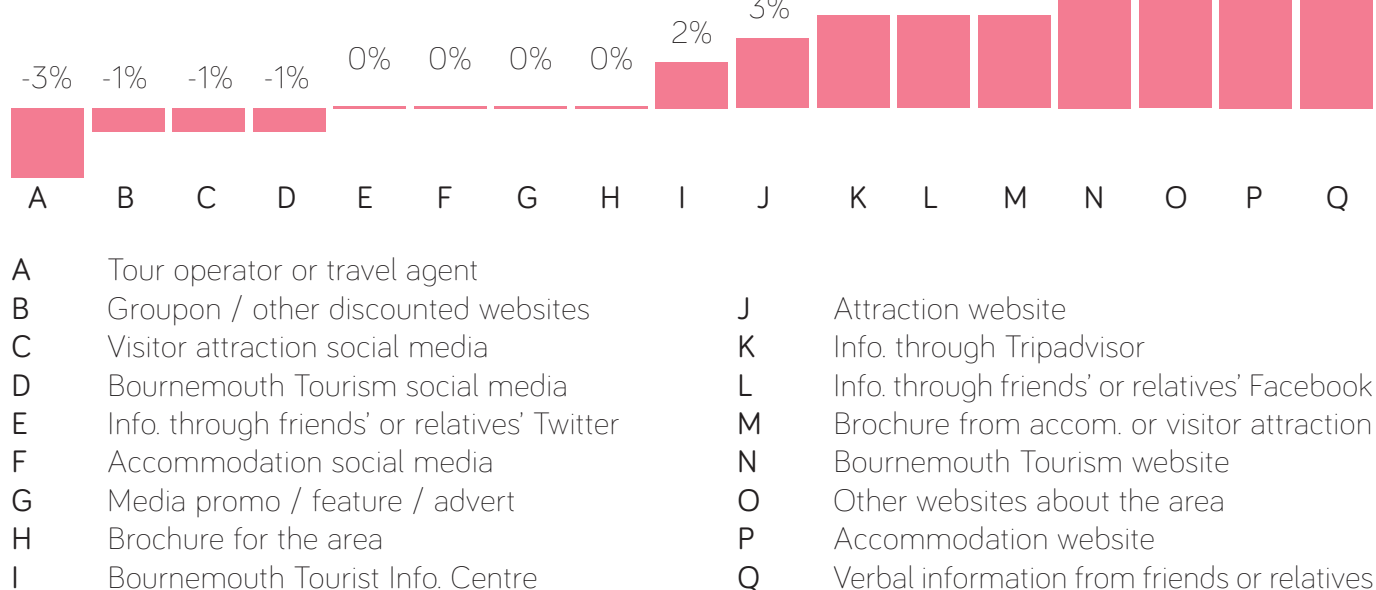
## What are their motivations to travel?

For all groups apart from 'single adults', the beach was the most frequented response followed by 'visited the area before' as reasons for choosing to visit Bournemouth.

Verbal information from friends or relatives and accommodation websites were the most influential information sources used by visitors in their decision to visit the area.

Influence of information sources in decision to visit Bournemouth (net %)

> Net influence





## Challenges & opportunities:



Exploiting the digital revolution is key to success: provision of online booking facilities is rising rapidly, smartphone use for planning a trip is now the norm, and Google is very often the first port of call. Is your web presence strong enough? Do you have a digital marketing strategy that allows you to make analytics-led decisions?

Visit [coastaltourismacademy.co.uk](http://coastaltourismacademy.co.uk) for details of our courses in digital marketing.



'Generation Y' travellers (aged 25-34) tend to expect a much more personalized experience and tend to book late and 'on the hoof'. (34% of Bournemouth's staying visitors leave it until the week before their trip to book). How accessible is your business to this growing segment, and how flexible is your offer to their preferences?



84% of Bournemouth's visitors typically use the internet to plan and book a trip (including 81% aged 55-64), and increasingly this activity is multi-device. Could your website be improved? Does it enable online booking? And if so, do you offer a best online rate guarantee for direct bookings?



Last minute decision making is an increasing trend. How could you use your database or CRM (customer relationship management) system to better communicate last minute deals or offers to convert late decision makers?



1 in 4 visitors internationally now book their trip via smartphone and 22% of the UK population now only access the internet via smartphone. Of Bournemouth's visitors, 73% use smartphones to plan and book their trip. Is your website device responsive?



What is Cornwall or Brighton offering your visitors that Bournemouth isn't? What could you offer that may be the deciding factor in Bournemouth's favour?



It's now the norm to use smartphones during trips for information and inspiration. Once at a destination, 58% of leisure travellers rely on online sources to evaluate local activities, compared to 42% using brochures etc, according to Google. Have you considered leveraging user-generated content (images, reviews, video etc) to allow advocates to tell your story for you?



How much do they typically spend during their trip, and on what?

3  
Visitor spend



## Indicators:


Day visitors spent an average of £23.26 per person, per day

Stay visitors spent an average of £36.46 per person per day (excluding accommodation)

Stay visitors spent an average of £45.24 per person, per night on accommodation

Bear in mind that these figures can only be indicative, as visitors will be giving an approximation of trip expenditure during their trip rather than actual expenditure at the end of it.

## Insight:

- > Visitors **after the summer holidays** spent **significantly more than before** and during the summer holiday (£9 more per day than during the summer holidays and £14 more per day than before the summer holidays)
  - > Visitors **staying outside Bournemouth and visiting for the day** spend more than stay visitors in Bournemouth (£30.70 per person, per day)
  - > Just over **40%** of the total spend by visitors was spent on **food and drink**.
  - > Singles or adult couples were significantly more likely to spend more per person
  - > Visitors aged **55–64** ('empty nesters') and **25–34** ('Generation Y') have the **greatest spend per day** of all the age groups whilst visitors aged **18–24** have the **lowest spend per day**. Visitors aged **55–64** and **25–34** are also the groups most likely to return to Bournemouth again.
- 

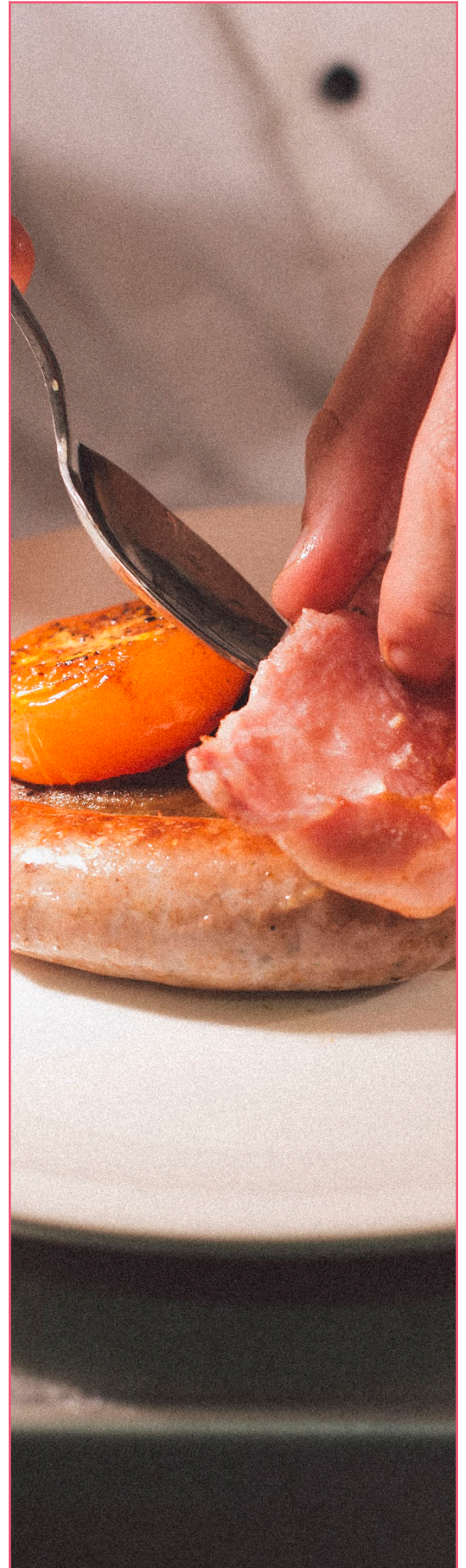


## Challenges & opportunities:



Food and drink is a significant proportion of visitor spend per day. In 2013, over half of the British population aged 16+ were interested in food-related activities while on a holiday or short break in England, and interest is highest in dining in hotels / restaurants / cafes serving local food / produce (76% of all respondents in VisitEngland's local food and drink survey booster).

**Could you capitalise on this growing interest in all things local and optimise associated spend by offering more locally sourced food and drink that adds value to the visitor experience, up-skilling your chefs and front of house staff or using menus to drive additional F&B revenue? Do your menus give your visitors a 'sense of place'?**



What do visitors do during their trip and what do they think?

4

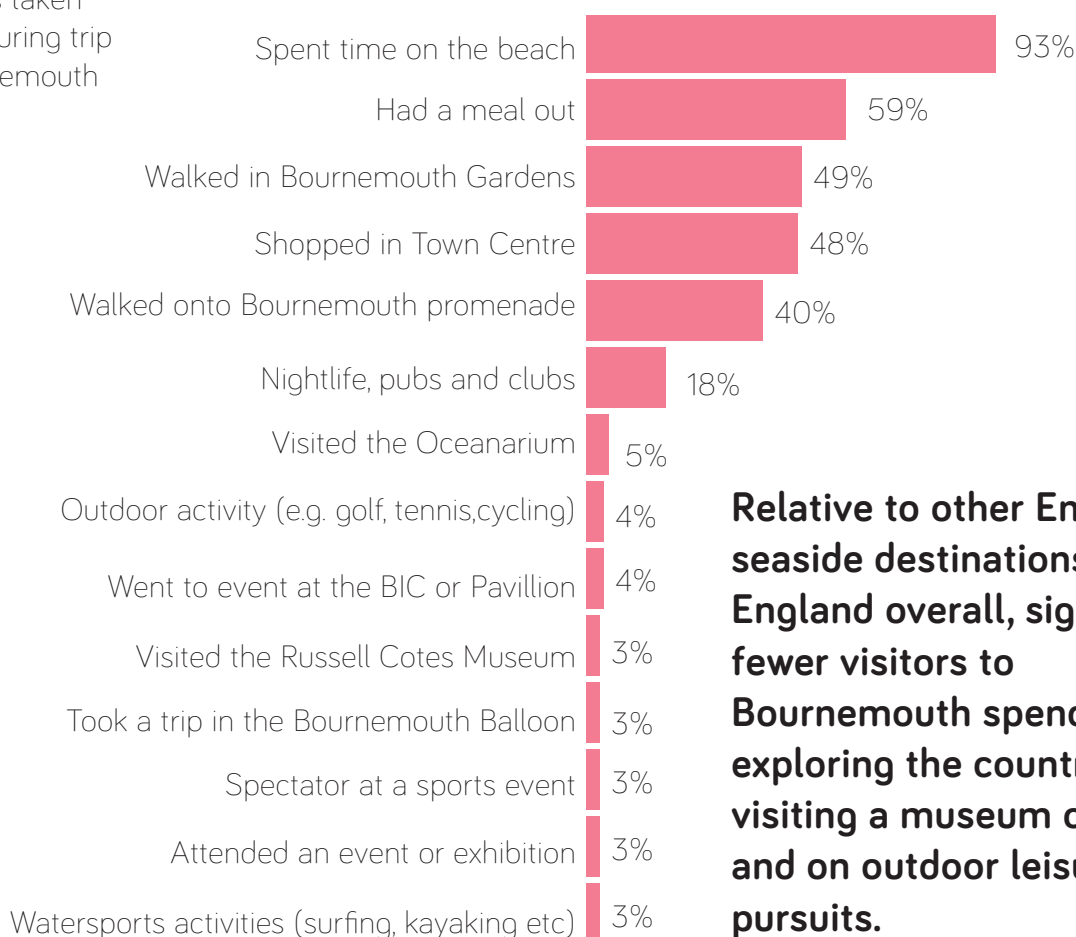
Experience and  
satisfaction

## What do visitors do in Bournemouth?

Just over nine out of ten (93% of respondents) have spent time on the beach, almost two thirds (59%) had been for a meal out, just under half (49%) had walked in Bournemouth Gardens and (48%) shopped in the town centre.

- > Adult couples were significantly more likely to spend time in Bournemouth Gardens and having a meal out than single adults or family groups.
- > Visitors aged 35-44 were significantly more likely to spend time on the beach than those over 65.

Activities taken part in during trip to Bournemouth (%)



**Relative to other English seaside destinations, and England overall, significantly fewer visitors to Bournemouth spend time exploring the countryside, visiting a museum or gallery, and on outdoor leisure pursuits.**

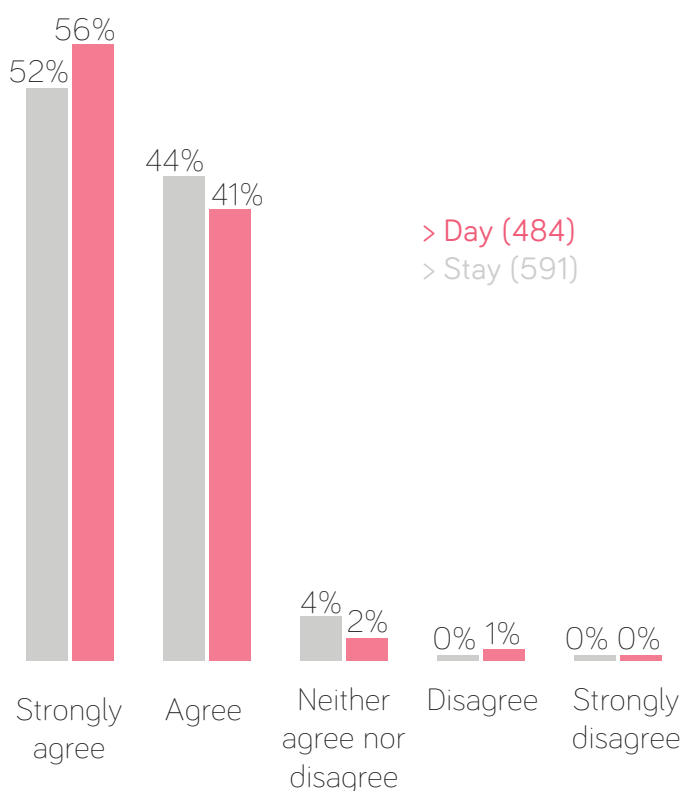
## What do they think of their experience?

### Insights:

- > Satisfaction increases the longer visitors stay and the more often they visit.
- > Staying visitors are more likely to be 'very satisfied' with their experience than day visitors.



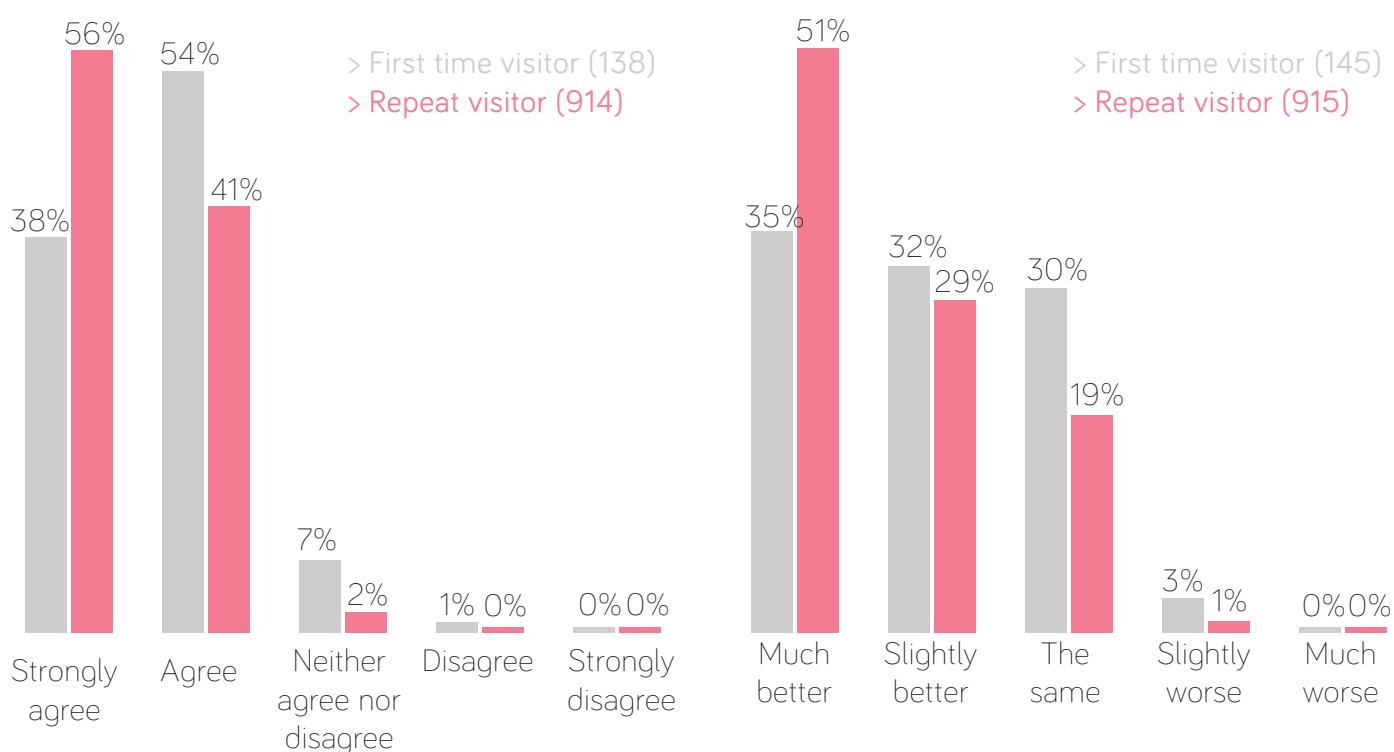
Agreement with statement 'overall I am very satisfied with my experience of Bournemouth today' by type of visit (%)



- > Repeat visitors are significantly more likely to be 'very satisfied' compared to first time visitors (56% vs 38%), and significantly more likely to state that they are 'very likely' to visit Bournemouth again.
- > Repeat visitors were also significantly more likely to say that Bournemouth is 'much better' than other destinations compared to those respondents on a first visit to Bournemouth.
- > Repeat visitors, particularly visiting during or after the summer holidays, are more likely to recommend Bournemouth to friends and family.

Agreement with statement 'overall I am very satisfied with my experience of Bournemouth today' by repeat / first time visitor (%)

Comparison to other destinations by first time / repeat visitor (%)





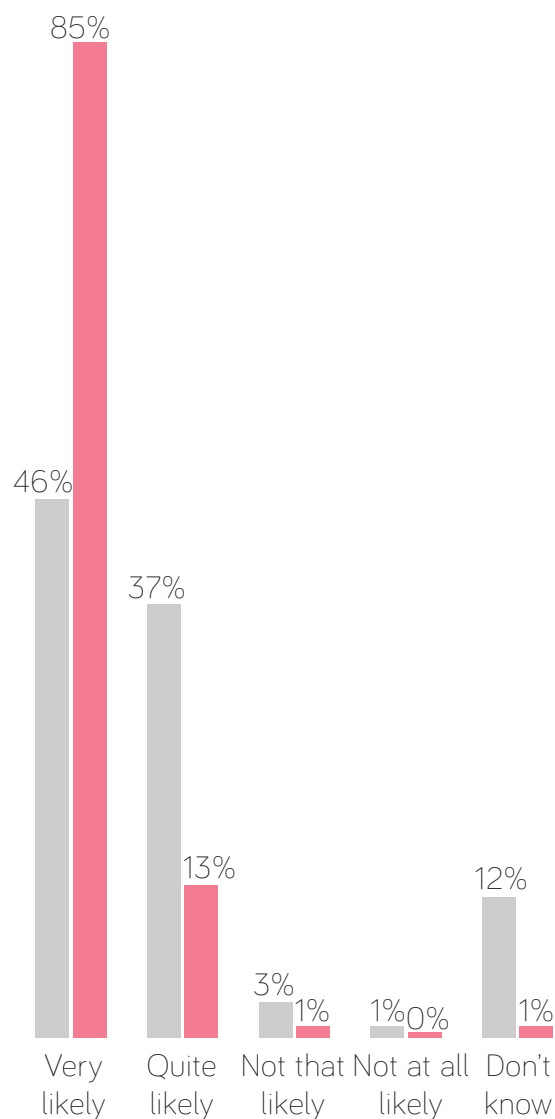
Revisit behaviour by first time / repeat visitor (%)

> Older adult couples (aged 55+) who have visited Bournemouth before have higher satisfaction levels. Satisfaction levels also **increase after the summer holidays**.

> Visitors after the summer holidays were significantly more likely to rate Bournemouth 'very enjoyable' (83%) compared to those visiting before, **more likely to return** and **more likely to recommend** Bournemouth to friends and family. Visitors **before the summer holidays** are **less likely to recommend** Bournemouth.

> Families are the **most likely** to return of all the group types.

> Aged 18-24 are **least likely** to visit again, least likely to recommend to friends and family and least likely to rate Bournemouth as '**much better**' than other destinations



> First time visitor (147)

> Repeat visitor (926)

**So, 'very satisfied' visitors are significantly more likely to be:**

- > **repeat visitors, staying in Bournemouth rather than on a day trip**
- > **older adult couples, visiting after the summer holidays, on a longer break.**

## What do visitors think could be improved?

Car Parking

Toilets

Restaurants and cafés

## What has the biggest influence over their likelihood to recommend?

Restaurants and cafés,  
visitor attractions

## Challenges & opportunities



Overall, staying visitors rated their accommodation positively, however against the national and English seaside destination averages, Bournemouth under-performs in terms of quality and variety of accommodation to suit visitors' needs. National research suggests that seaside accommodation providers with the ability and confidence to invest in their product are reaping the rewards. 53% of seaside accommodation providers felt they would attract more visitors to their destination by investing in their facilities or fittings in 2013\*. Could you use research insights to guide investment in your product?

\* VisitEngland / BDRC Continental "England's Seaside: What are the Opportunities?" 2013



Visitors aged **18-24** are a growing segment nationally as a result of a sustained fertility rate since the early 1990s, but are the least satisfied and least likely to recommend Bournemouth of all its visitors. Understanding the world of 'generation Y' visitors, their short attention spans, their propensity to live and share online and their desire for the quirky and unconventional is ever more important. This generation likes to be social and connect with the people and places around them - can your staff talk their language, connect quickly and recommend the 'in' places to go?



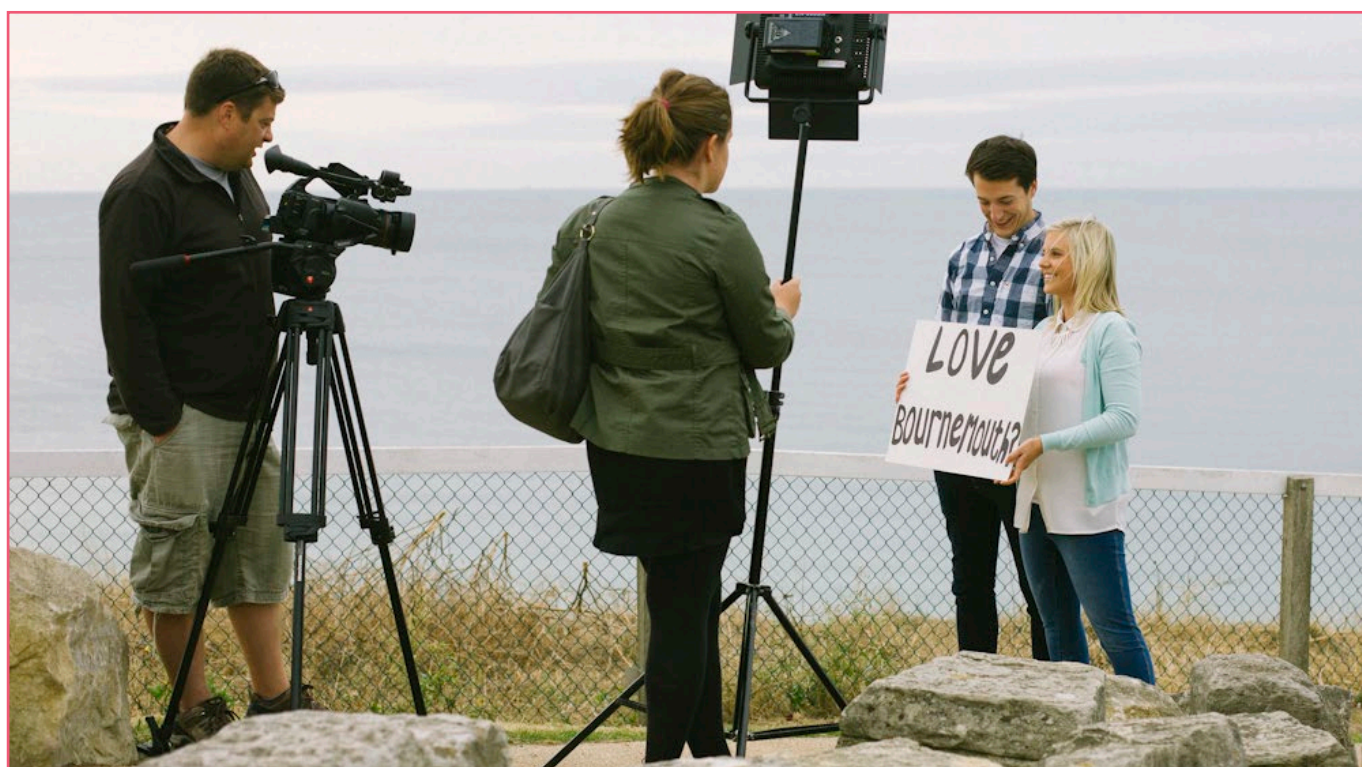
Repeat visitors are more likely to return and recommend. Could you pro-actively encourage first time visitors to return, for example by offering repeat booking rates or value-added extras to stimulate repeat business?



If satisfaction increases with length of stay, could you help influence satisfaction levels by offering special deals to encourage longer stays, for example **4** nights for the price of **3**, and collaborate with visitor attractions outside Bournemouth to offer special entry as part of the package? Simply increasing length of stay, particularly before the summer holidays, could have a significant impact not only on visitor spend but also visitor satisfaction and therefore likelihood to recommend and return.



Older visitors are generally more satisfied with their experience of Bournemouth than other age groups, but are less likely to 'vote with their fingers' and share positive experiences via social media. Have you considered encouraging 'analogue tweets'? In other words: they write it, you tweet it (with permission, of course!)



## Questions?

If you would like to discuss the implications for your business of any of the findings in this report, we'd be happy to meet or arrange a call.

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## Connect:

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