



# LINCOLNSHIRE NON-VISITOR RESEARCH

August 2017

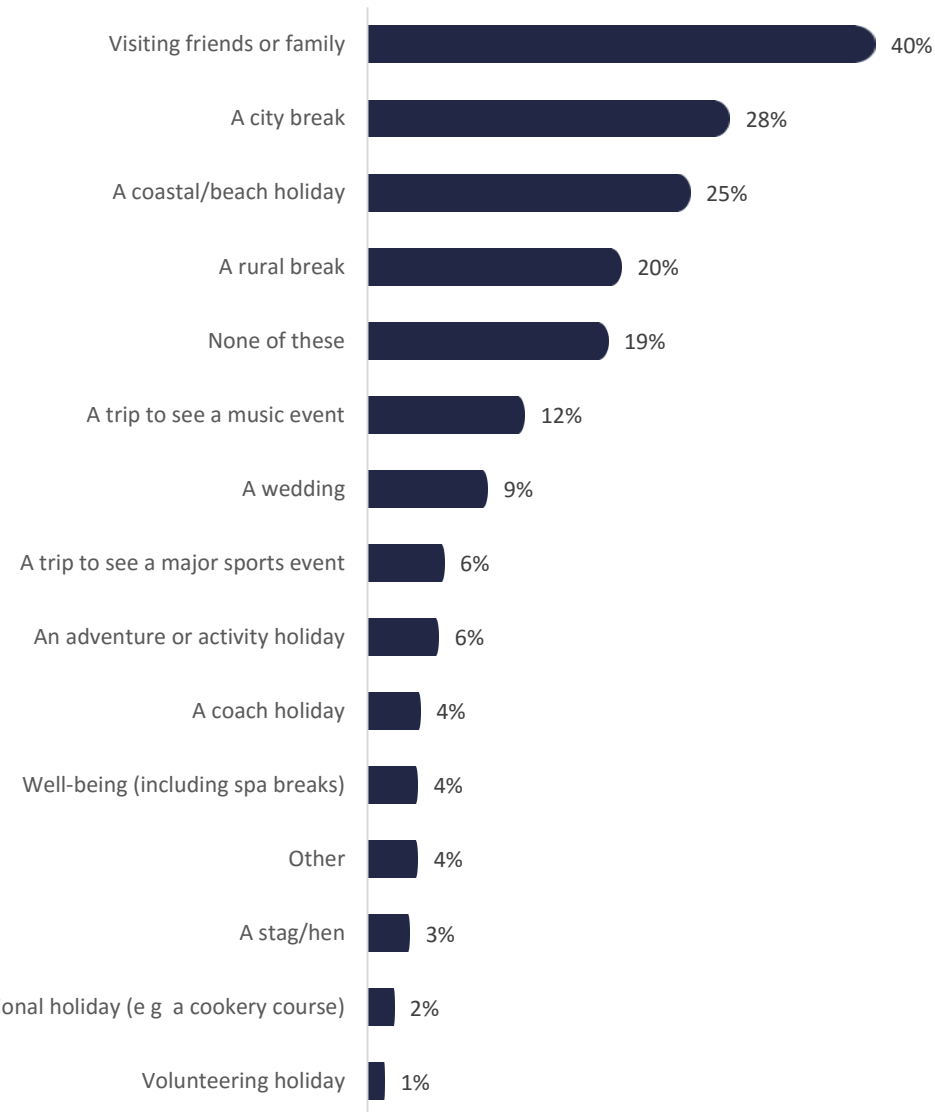
Arkenford

# INTRODUCTION



- △ The data was collected through an online survey
- △ 1,000 respondents took part overall
- △ To qualify for the survey, respondents must not have visited anywhere Lincolnshire within the past 5 years
  - △ For the first week that the survey was open, to qualify the respondent must have not visited in the last 10 years, however we found that less than 10% of people within the 60 minute drive time group qualified for the survey. We then changed the criteria to in the last 5 years to ensure we could achieve a robust sample.
- △ 75% of the sample lived within a 60 minute drive time of Lincolnshire, but not within Lincolnshire
- △ 25% lived further afield, outside of 60 minutes drive time
- △ We achieved a good mix of age, gender, working status and social segment within the sample
- △ The respondents were also segmented using Arkenford's ArkLeisure segmentation model (see slide 26 for detailed explanation of segments)

# THE SAMPLE – HOLIDAY BEHAVIOUR



- ▶ Respondents were asked what type of holiday they had taken in the last 12 months in the UK
- ▶ Visiting friends or family was most ticked, followed by city breaks and beach holidays

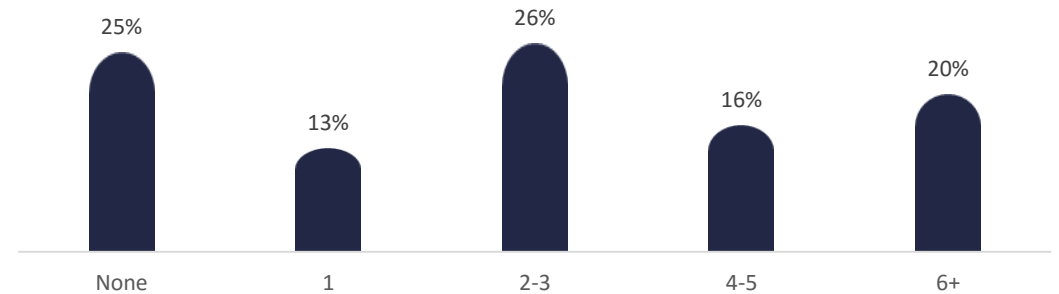


# HOLIDAY BEHAVIOUR CONTINUED

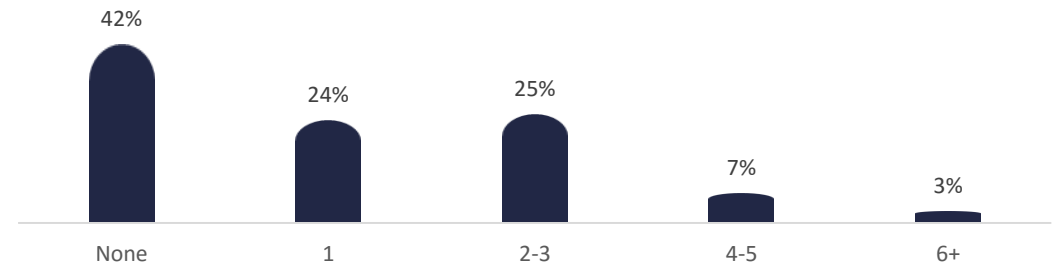


- 71% of respondents had been on some kind of UK holiday in the past 12 months, and 47% have travelled abroad
- Short breaks are more common in the UK than longer ones – 59% have taken a short break (3 nights or less), and 42% have taken a longer break (4 nights or more)
- The vast majority of those who have taken UK holidays in the last year have taken between 1 and 3 short or longer breaks
- 74% have taken at least one day trip to another UK location in the last 12 months, and the majority of these have taken more than one

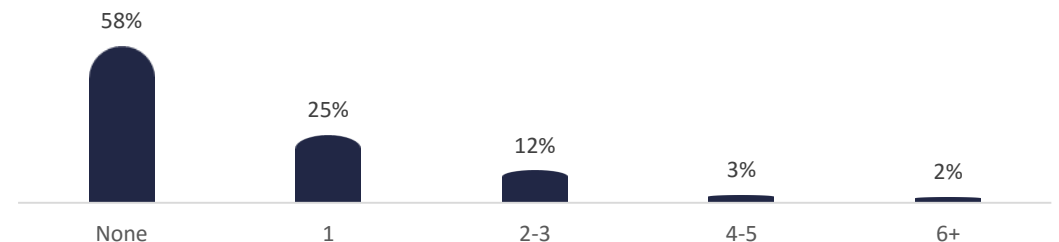
Number of UK Day Trips



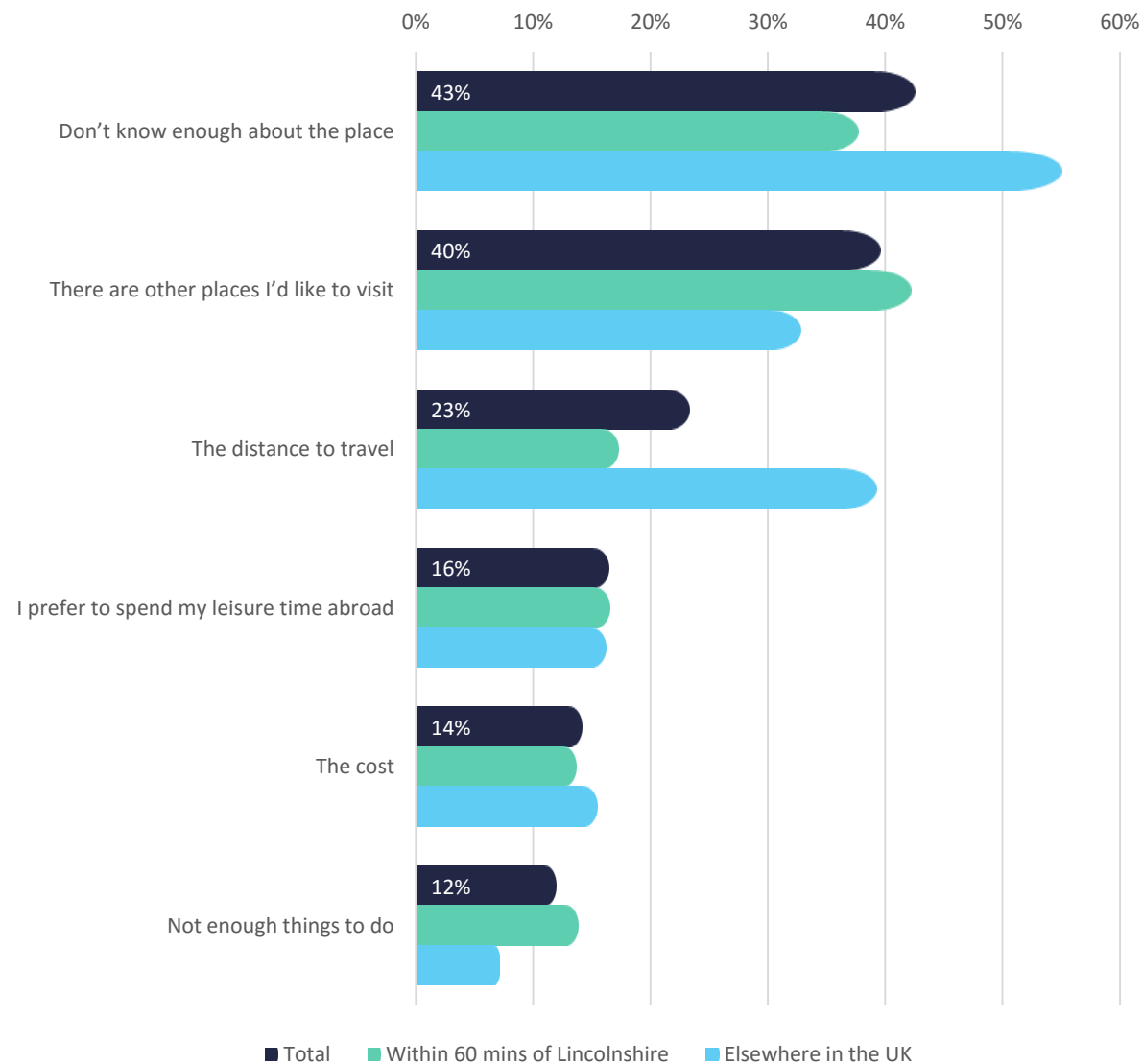
Number of UK Short Breaks (3 nights or less)



Number of UK Longer Breaks (4 + nights)



# KEY REASONS FOR NOT VISITING

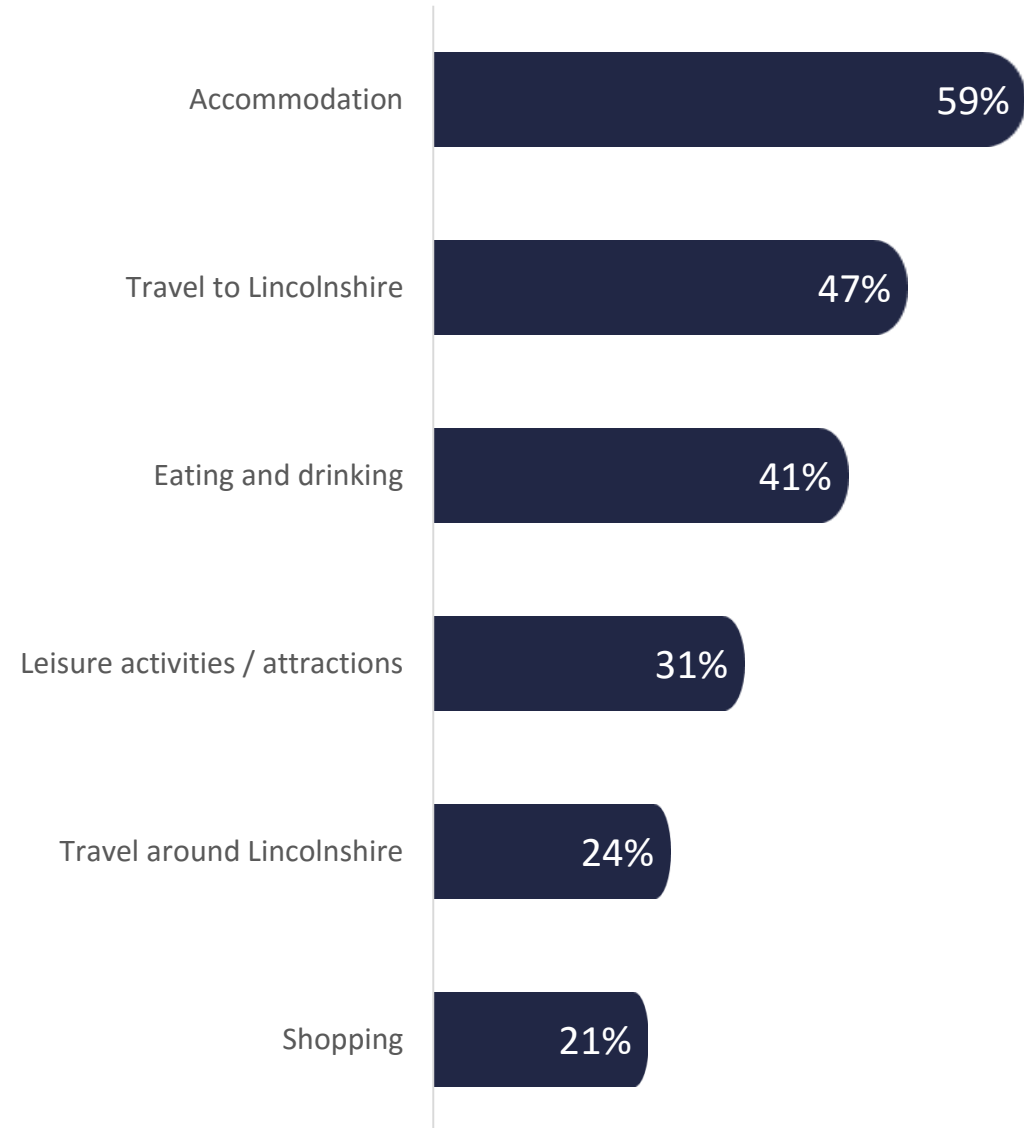


- △ The top five reasons behind not visiting Lincolnshire are listed in the chart to the left.
- △ Not knowing enough about the place is the key reason for not visiting, with 43% of respondents stating this as a reason.
  - △ It is not that Lincolnshire doesn't offer what they want, they simply don't know what it offers.
- △ Those who live further away (outside of 60 mins drive time) are even more likely to state this as a reason.
- △ The second most ticked reason is that there are other places that they would like to visit.

# THE COST



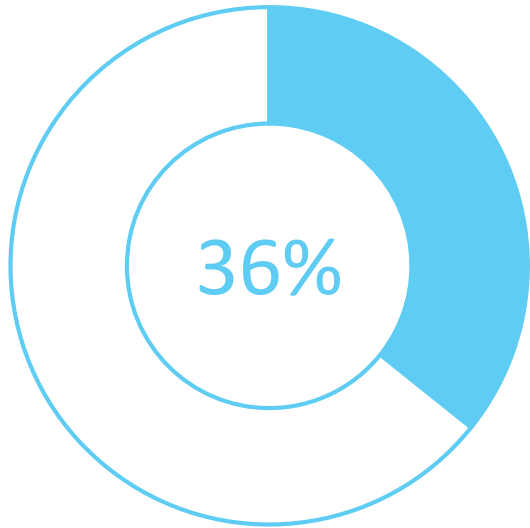
- Only 14% of respondents stated that the cost of visiting Lincolnshire was a barrier to visiting.
- We explored further exactly where people perceived the cost to be too high
- Accommodation is the key area where non-visitors perceive Lincolnshire to be too expensive, followed by travel to Lincolnshire.
- Although value for money is not a key reason for not visiting, this still highlights that the value for money aspect of Lincolnshire could be emphasised further



# COASTAL BREAKS

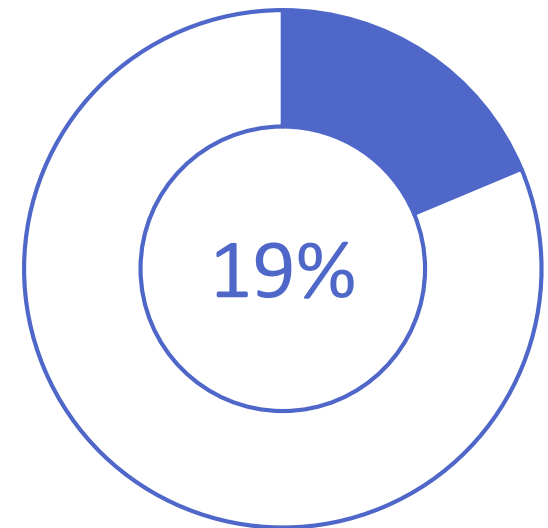
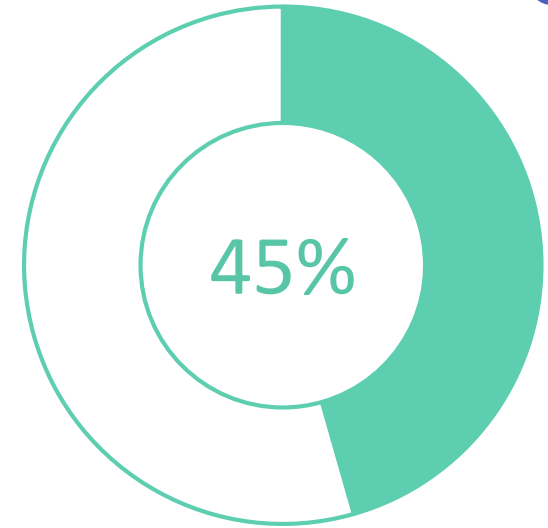
## Which of the following best describes your type of thing?

Relaxing on a slower-paced traditional break in a smaller seaside town or village: hire a beach hut, walking, cycling or tennis. Sampling fresh local produce at cosy pubs. Explore the local markets and festivals



Heading off the beaten track and discover a tranquil and unspoilt coastline which is a haven for birds, seals and other wildlife. Enjoy the fresh air and freedom of the sand dunes and marshes and get close to nature

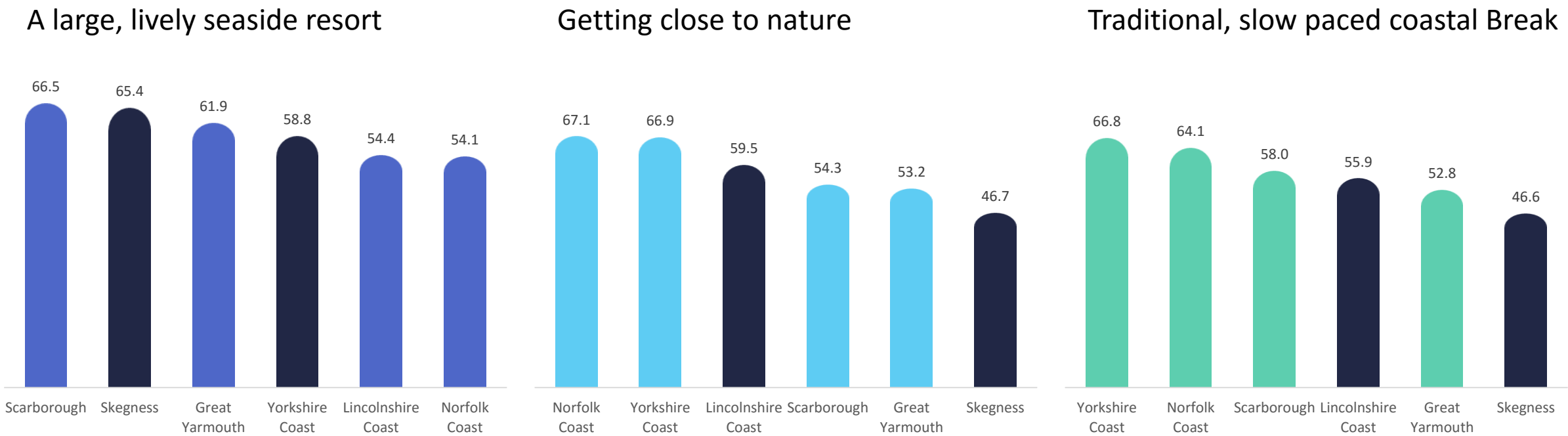
Enjoying the thrills and spills of a large, lively resort with bright lights and buckets and spades candy floss and donkeys white-knuckle rollercoaster rides and all the fun of the seaside



# HOW DOES LINCOLNSHIRE COMPARE?



## Coastal Breaks – Mean Score Out of 100



Lincolnshire scores best as a destination for a coastal holiday, with Skegness in particular being perceived as a destination for a lively seaside resort holiday/short break.

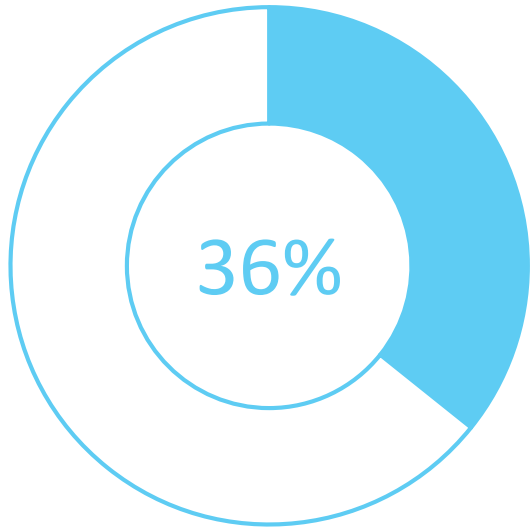
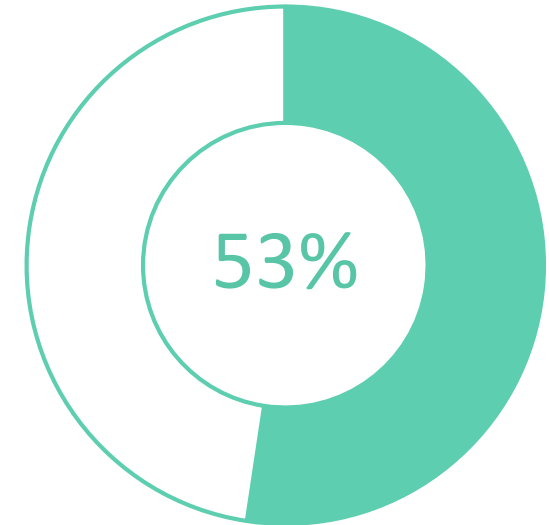


# RURAL BREAKS



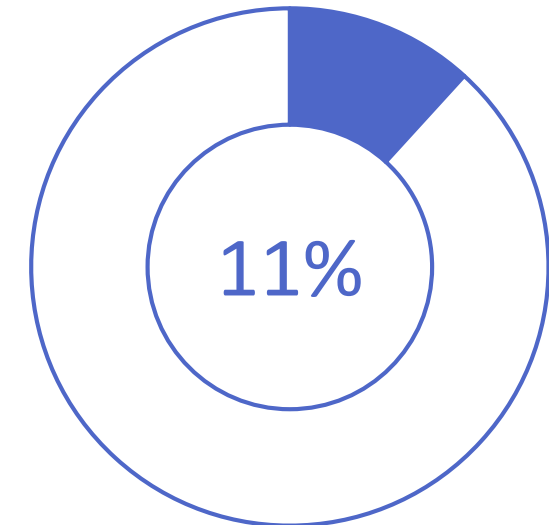
## Which of the following best describes your type of thing?

A rural short break or holiday based in one destination but touring around the market towns and villages, exploring the sights and traditions, sampling the local food and drink and soaking up the scenery



An escape to the countryside to get away from it all with your partner and/or friends. Holing up in a secluded cottage and indulging in the luxury of time devoted to chilling out, conversation or relaxing with a good book, occasionally popping out for a refreshing walk and a meal at the local pub

A holiday dedicated to pursuing an activity such as walking, cycling, riding, fishing, bird-watching or a hobby such as painting

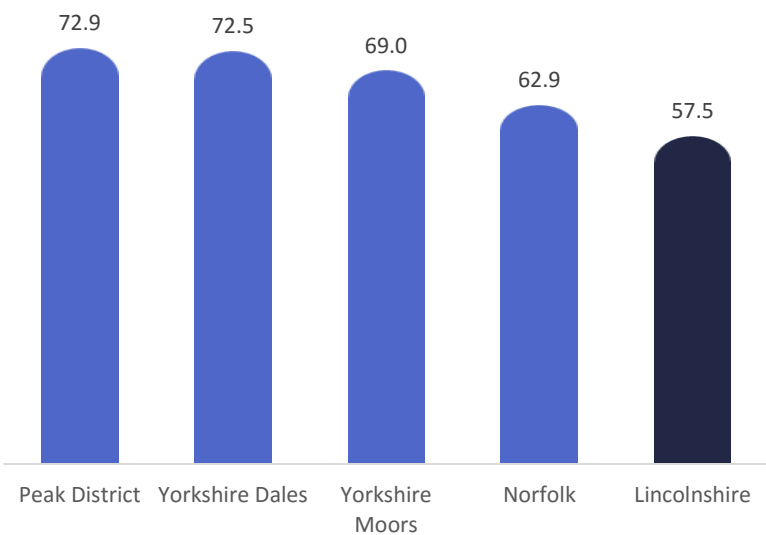


# HOW DOES LINCOLNSHIRE COMPARE?

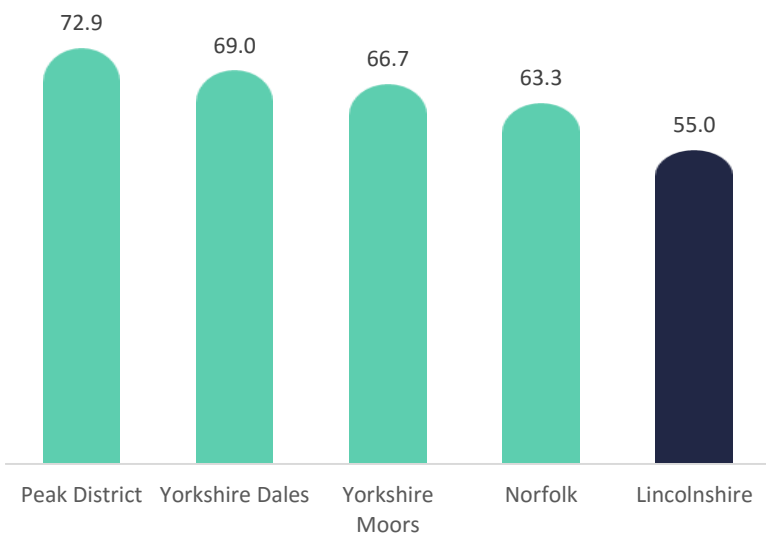


## Rural Breaks – Mean Score Out of 100

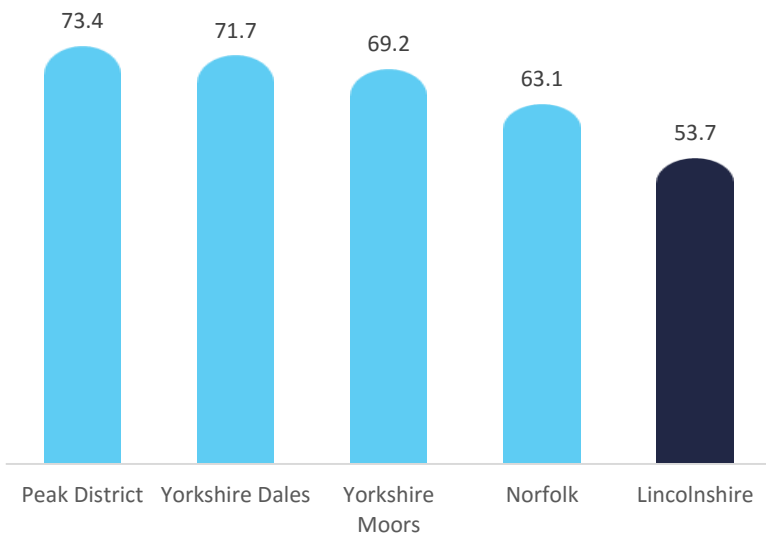
Touring around




Pursuing a hobby



Get away From it all



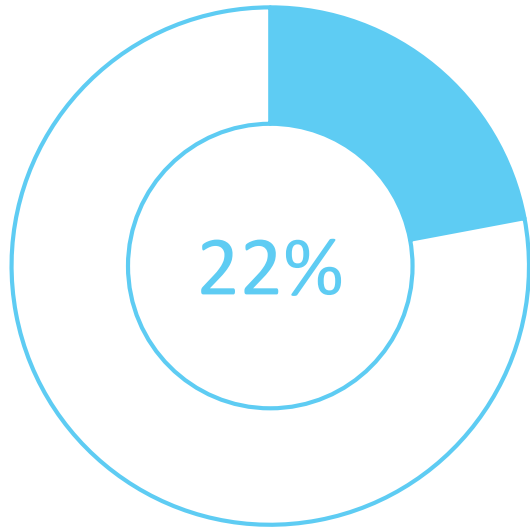
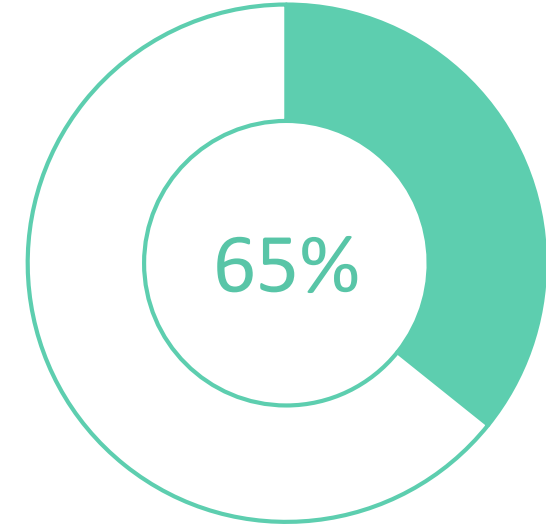
 The rural offer is where Lincolnshire struggles to compete with other destinations in the North of England. Raising its profile as a rural destination will help to broaden its appeal and attract more first time visitors.

# CITY BREAKS



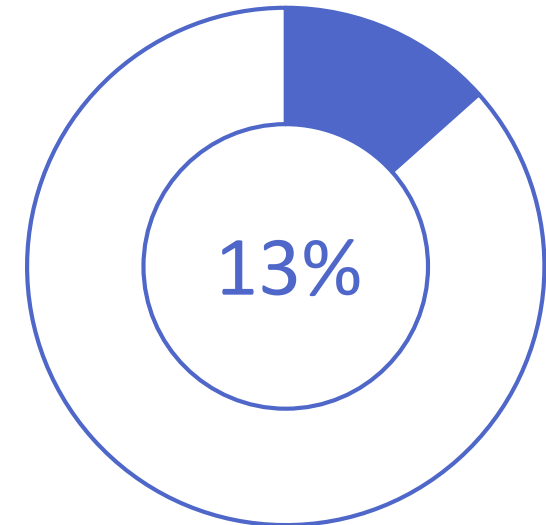
## Which of the following best describes your type of thing?

A trip to an interesting city with plenty of art, culture and heritage to explore and experience



A trip to a lively city with your partner and/or friends, where there are lots of bars, clubs and other evening entertainment

A trip to a city offering both the high street brands and boutiques for some serious retail therapy

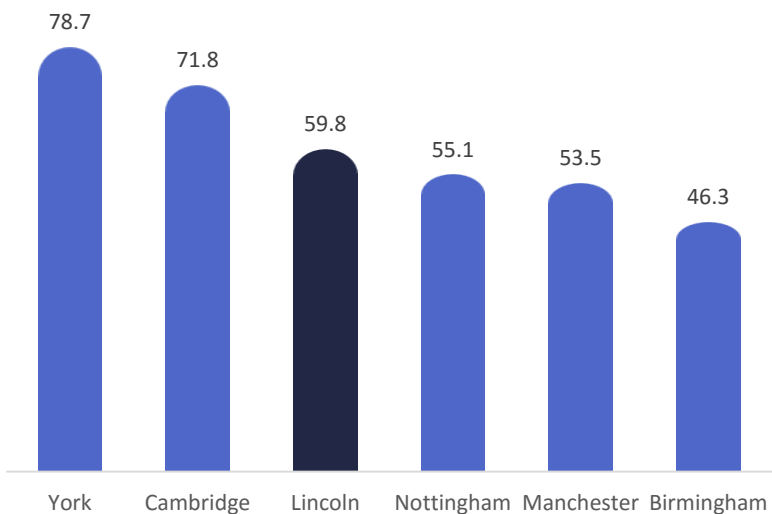


# HOW DOES LINCOLNSHIRE COMPARE?

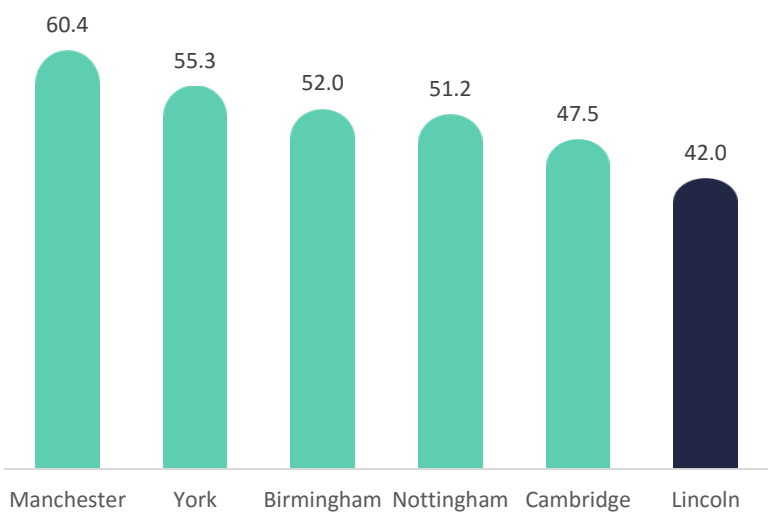


## City Breaks – Mean Score Out of 100

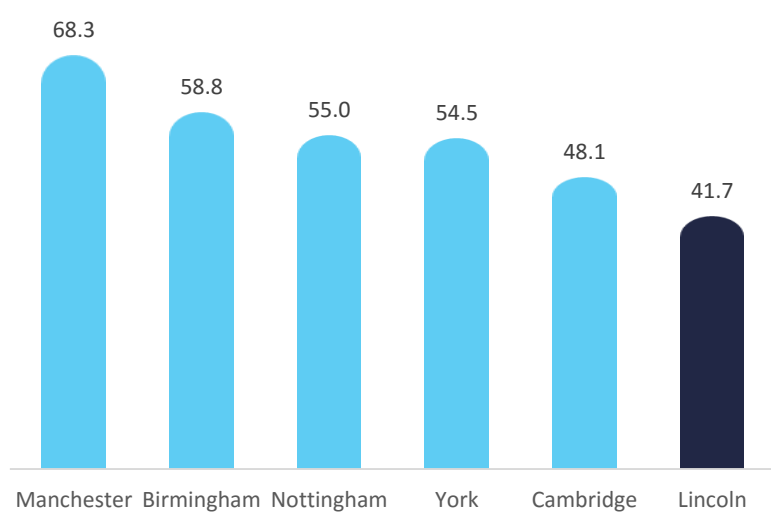
### Art, culture and heritage




### Retail therapy

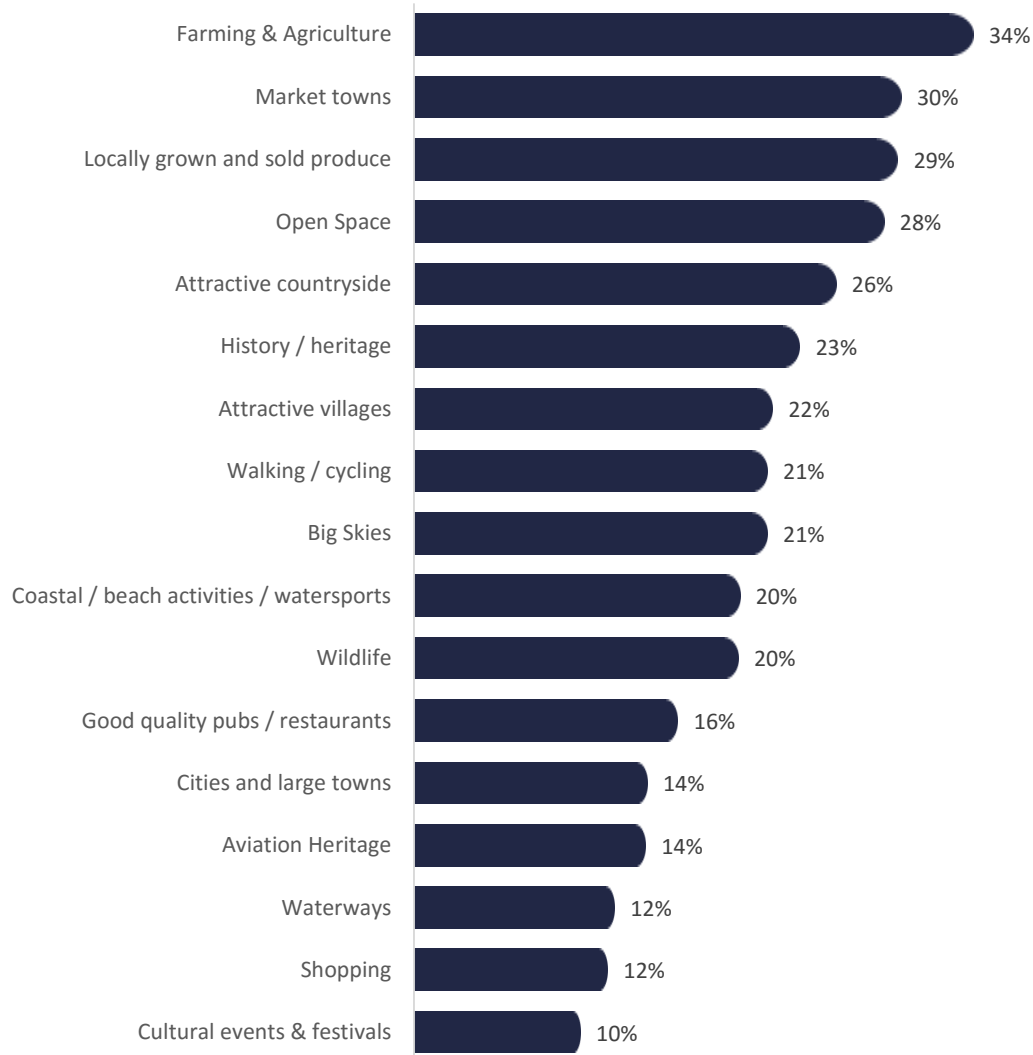


### Bars, clubs and evening entertainment



 In terms of city breaks, Lincoln scores most highly when it comes to arts, culture and heritage – the most popular type of city break.

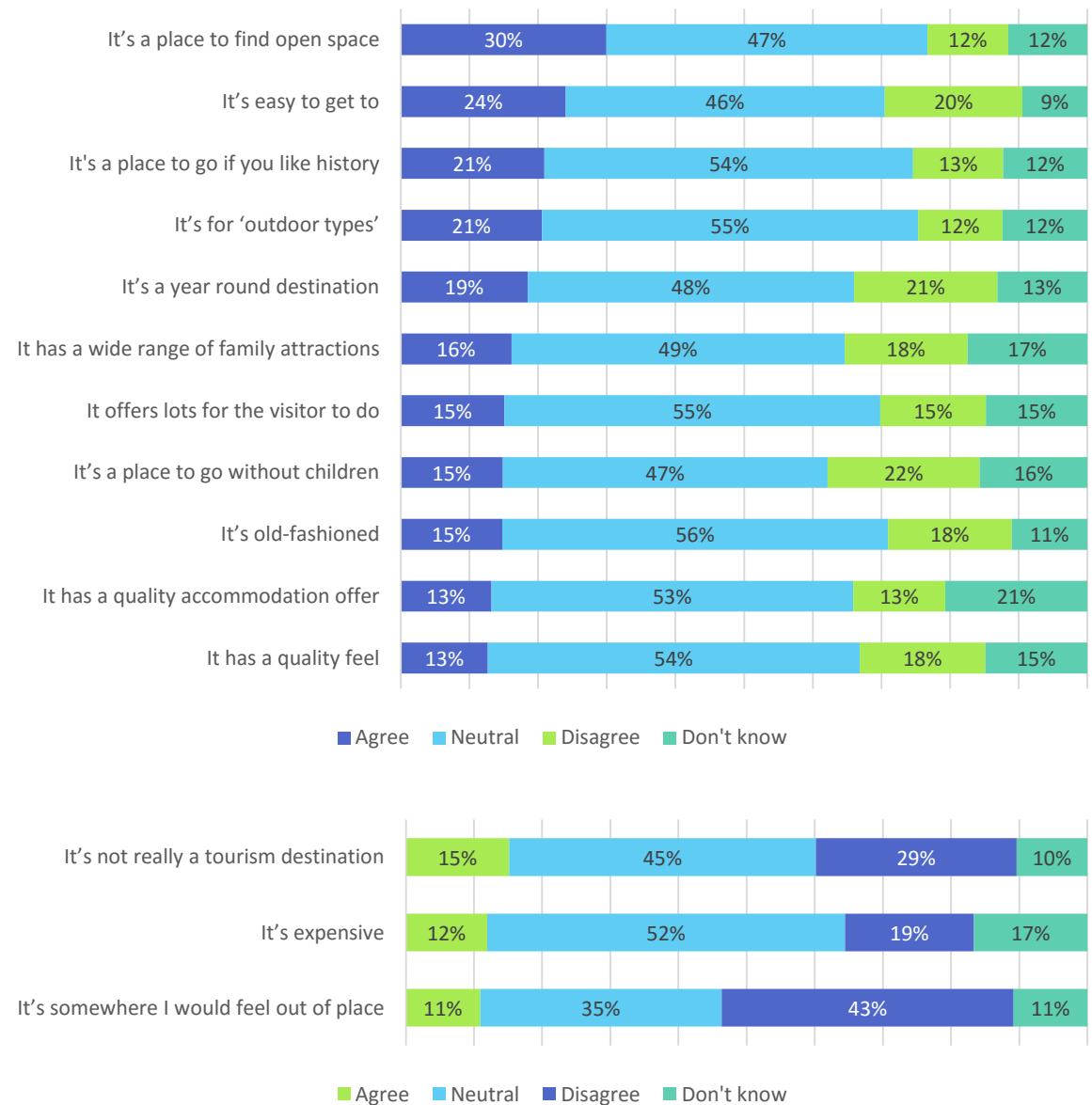
# ASSOCIATIONS WITH LINCOLNSHIRE



- △ The results of the associations in the non-visitor survey shown in the chart to the left back up the finding that people don't know what Lincolnshire has to offer
- △ Associations with Lincolnshire are low – especially if we compare this to the visitor research that Arkenford carried out in November 2016
- △ The same list was used in both the visitor survey and non visitor survey. In the 2016 visitor survey, the majority of features were strongly associated with Lincolnshire by over 70% of those who took part.



# PERCEPTIONS OF LINCOLNSHIRE

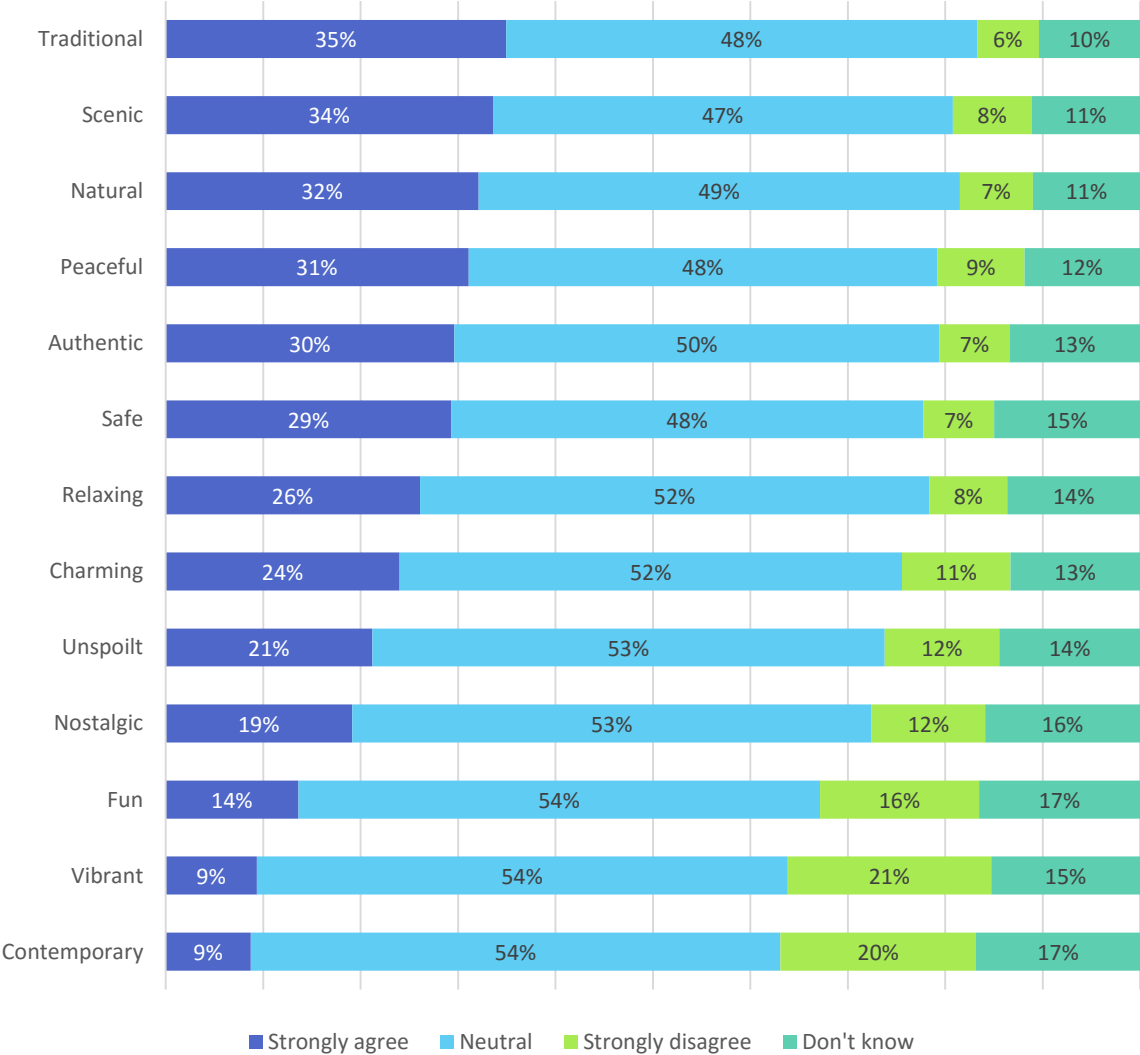


- ▶ The positive and negative statements have been split in to 2 separate charts
- ▶ Generally respondents were not agreeing or disagreeing with the statements about Lincolnshire – the large proportion of neutral responses backs up that they have little knowledge about the place
- ▶ The strongest perception is that it is a place to find open space, at 30%
- ▶ This is followed by it's easy to get to, at 24%
- ▶ Roughly a third of people either disagree or don't know for the majority of the statements

# PERCEPTIONS OF LINCOLNSHIRE

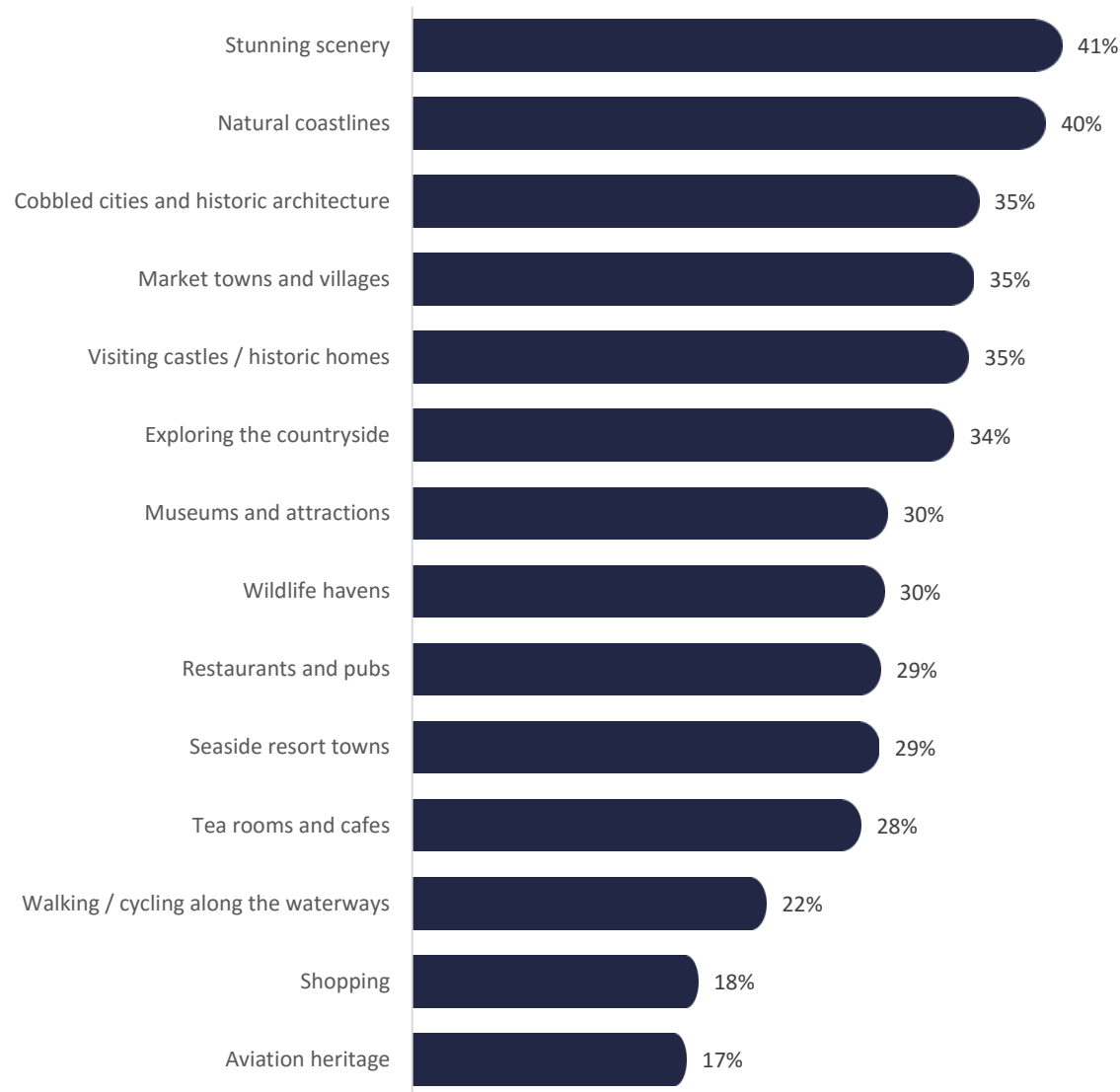


*To what extent do you agree that Lincolnshire is...*



- Lincolnshire is most strongly perceived to be traditional, scenic, natural and peaceful
- These are the same perceptions which we found in the visitor research, although the perceptions are far less strong here

# APPEAL OF EXPERIENCE AND ACTIVITIES

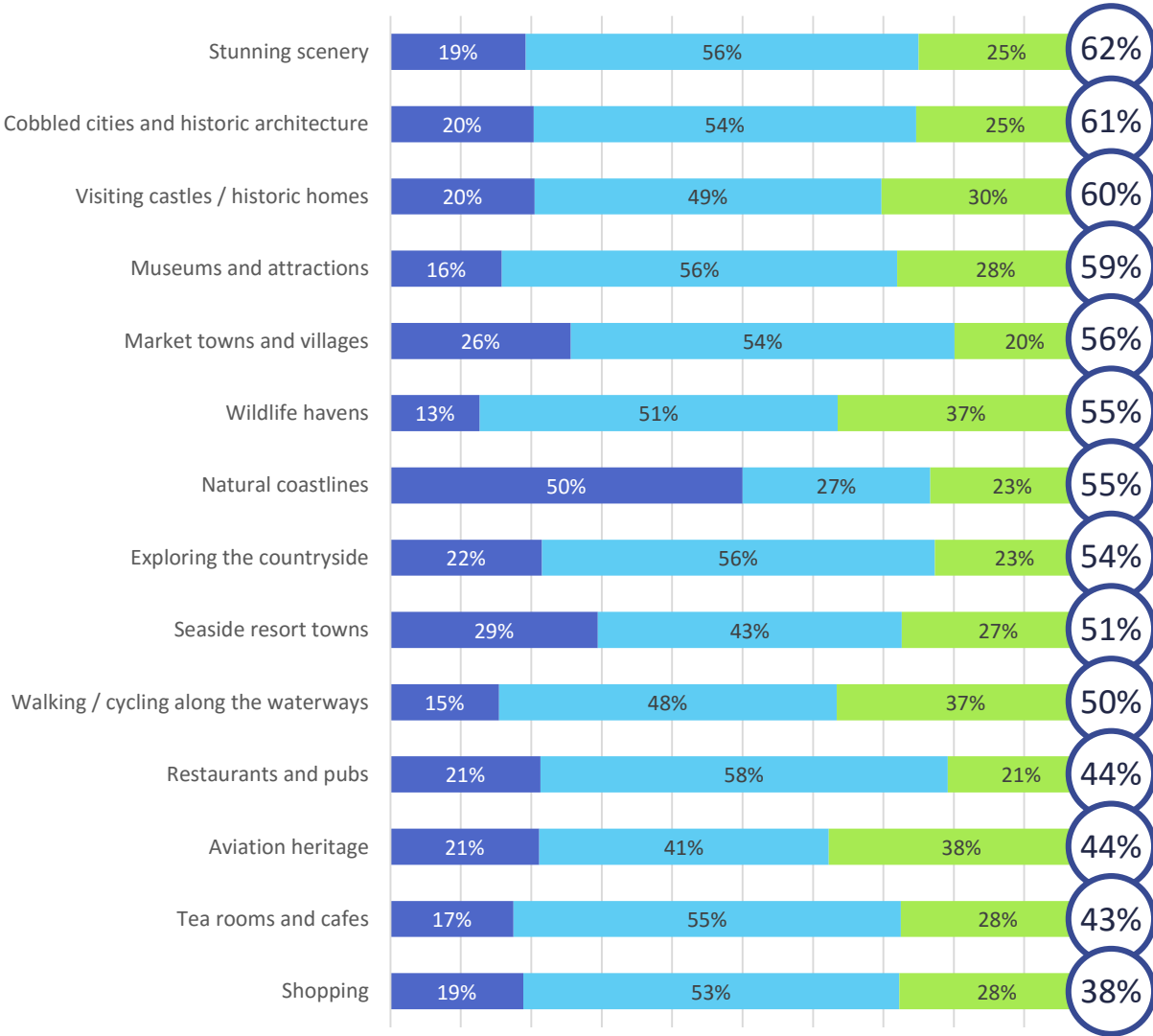


Respondents were asked which of the experiences and activities listed in the chart to the left appealed to them in general for any UK day trip, short break or holiday



Seeing the sites is what people are looking for - stunning scenery and natural coastlines have the highest appeal of the activities listed, followed by cobbled cities and historic architecture

# KNOWLEDGE AND IMPACT ON VISIT



○ Proportion who said this would make them more likely to visit Lincolnshire

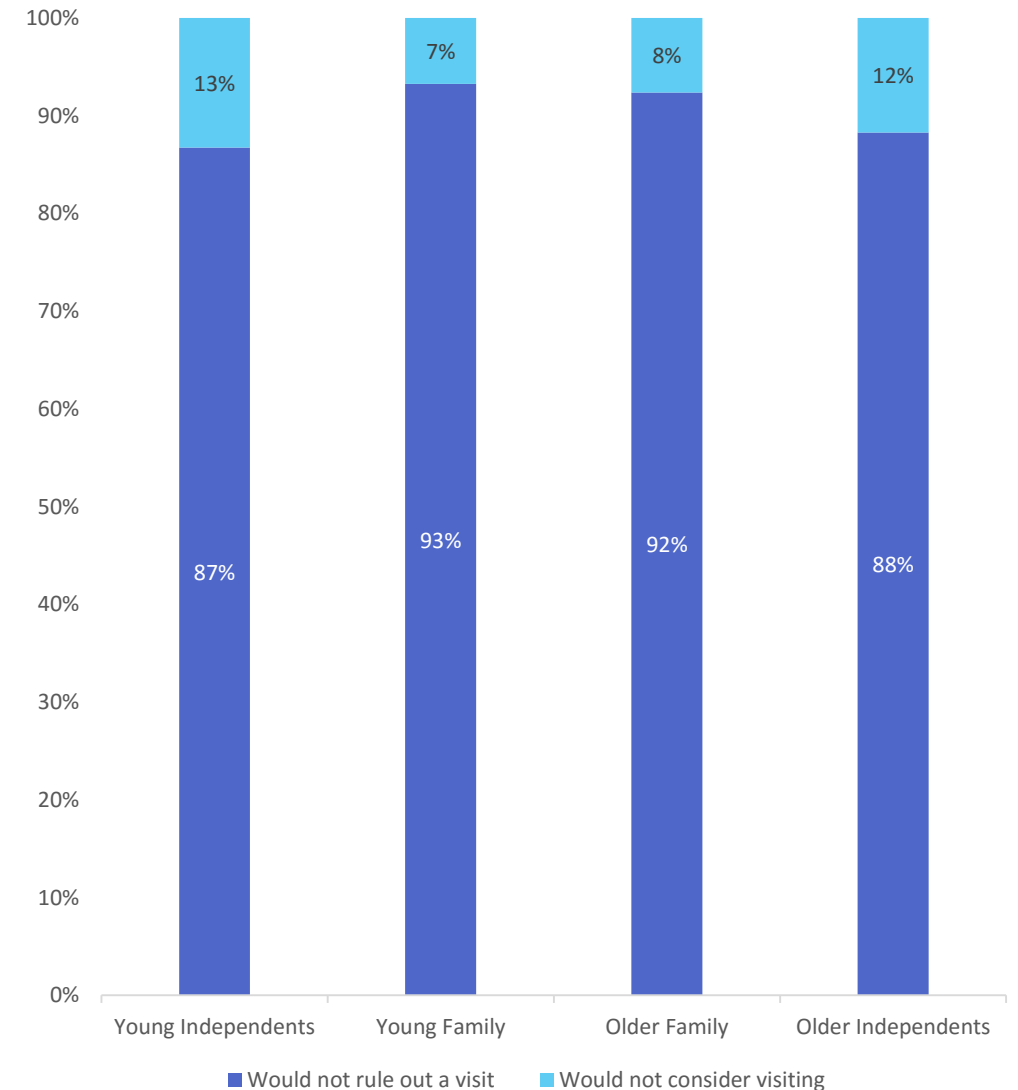
- Scenery, history and culture are the three key themes which would attract non visitors to Lincolnshire
- Lincolnshire is best known amongst non visitors for its natural coastlines, with 50% of the sample saying that they have a good knowledge of this offer
- However, for the vast majority of what Lincolnshire offers, there's a higher number of people who are unaware of the offer than people who are aware
- Aviation heritage has the highest number of people unaware of the offer. It also has a relatively low proportion of people who would be more likely to consider a visit knowing of the offer, suggesting that aviation heritage is more of a niche offer.

■ Good knowledge of this offer   ■ Some knowledge of this offer   ■ No knowledge that Lincolnshire offered this

# WHO IS MOST LIKELY TO VISIT?



- After seeing what Lincolnshire has to offer, 89% of respondents would not rule out a visit to Lincolnshire
- Those living within a 60 minute drive time are slightly more likely to visit (90% vs 85%)
- Families are also slightly more likely visit (93%), although differences are small – 88% of non families would not rule out a visit

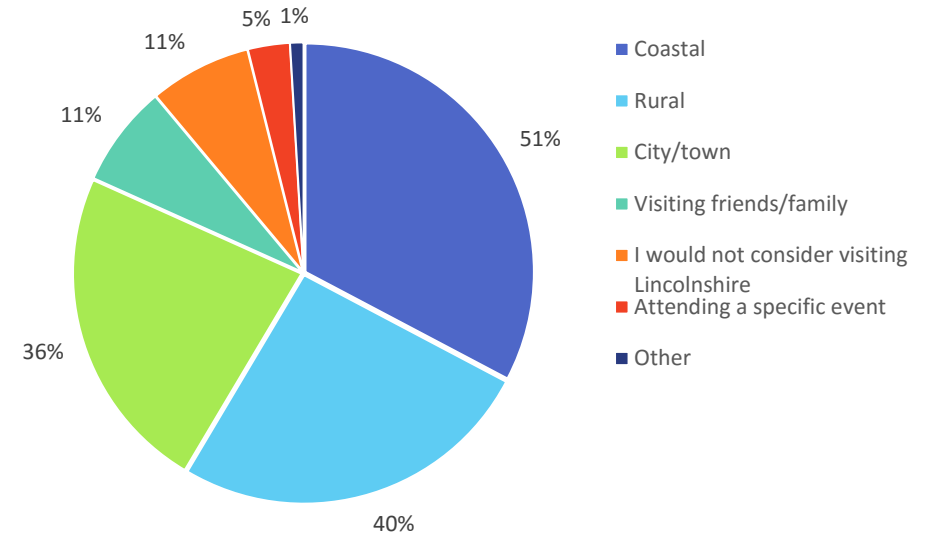




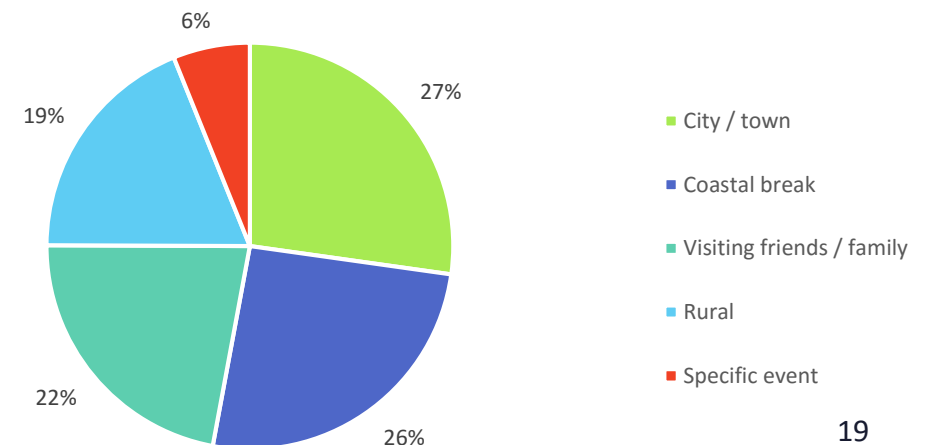
# TYPE OF TRIP THEY WOULD TAKE

- Respondents were asked what sort of trip they were most likely to take in Lincolnshire – they could tick as many options as they wanted.
- Coastal breaks were the most popular across all demographic groups, with just over half the sample choosing this type of break, but were particularly popular with young families
- Older people are more likely than other demographic groups to choose a rural break, but a higher proportion still chose coastal
- Only 11% of the sample said that they would not consider a visit after learning more about Lincolnshire (see next slide for more details)
- The results of the visitor survey carried out in 2016 show a slightly more mixed result, with almost equal numbers of visitors having taken a coastal or city break in Lincolnshire

Non-Visitor Survey: What type of trip would you consider taking in Lincolnshire? – Multi-select



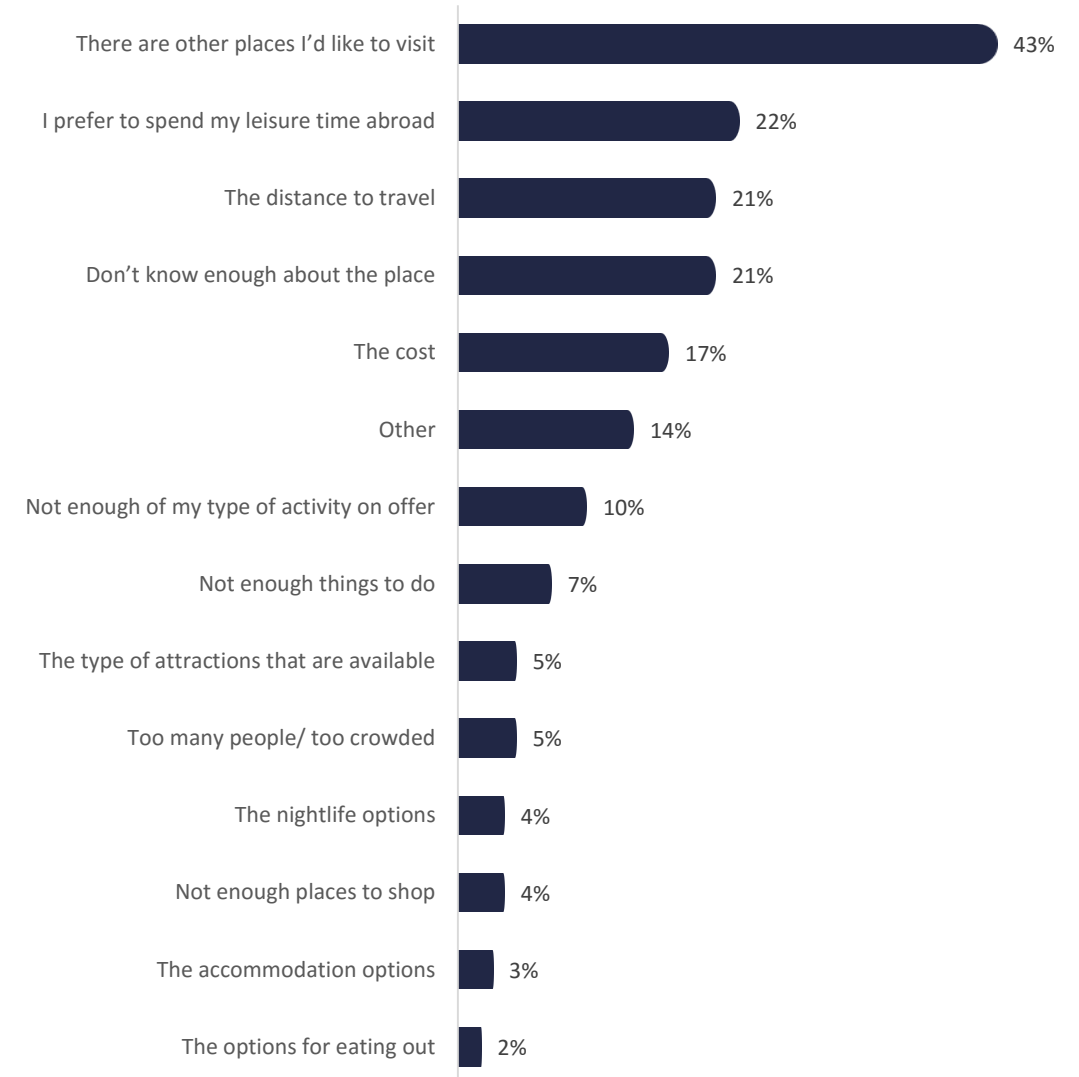
Visitor survey: What type of trip did you take on your most recent visit to Lincolnshire? – Single select



# REASONS FOR NOT CONSIDERING VISITING



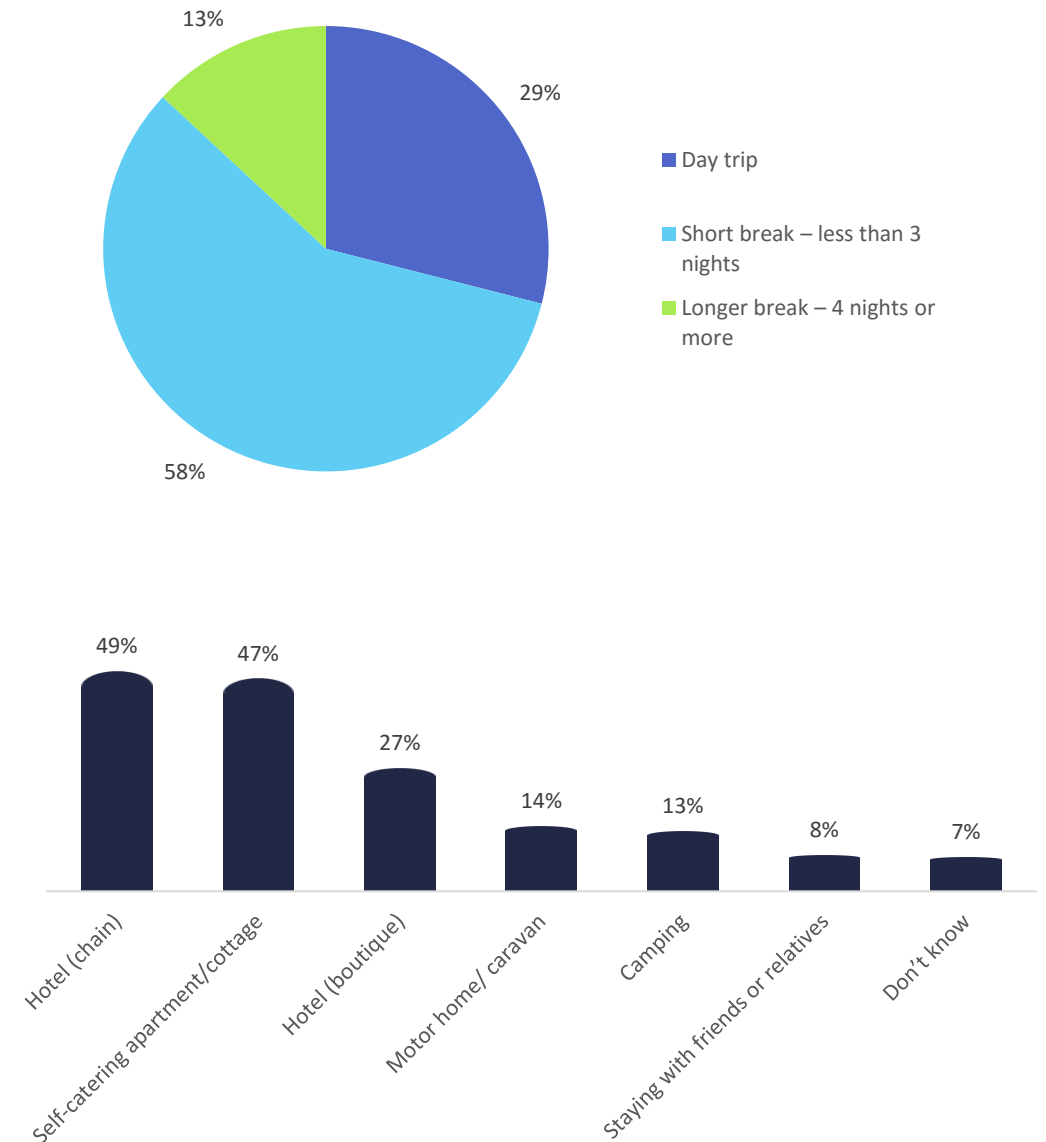
- ▶ Respondents who said that they would not consider a visit to Lincolnshire after seeing what's on offer were shown the same list of reasons for not visiting as at the start of the survey and asked to select why they would still not consider a visit
- ▶ A slight shift in reasons can be seen here – unsurprisingly that far fewer people now feel that they don't know enough about Lincolnshire to visit
- ▶ The key reason that people would still not consider a visit is because there are other places which are higher on their list
  - ▶ There is a lot of competition between UK destinations – developing and raising awareness of Lincolnshire's product should help to move it higher up their list of places to visit



# TYPE OF TRIP CONTINUED

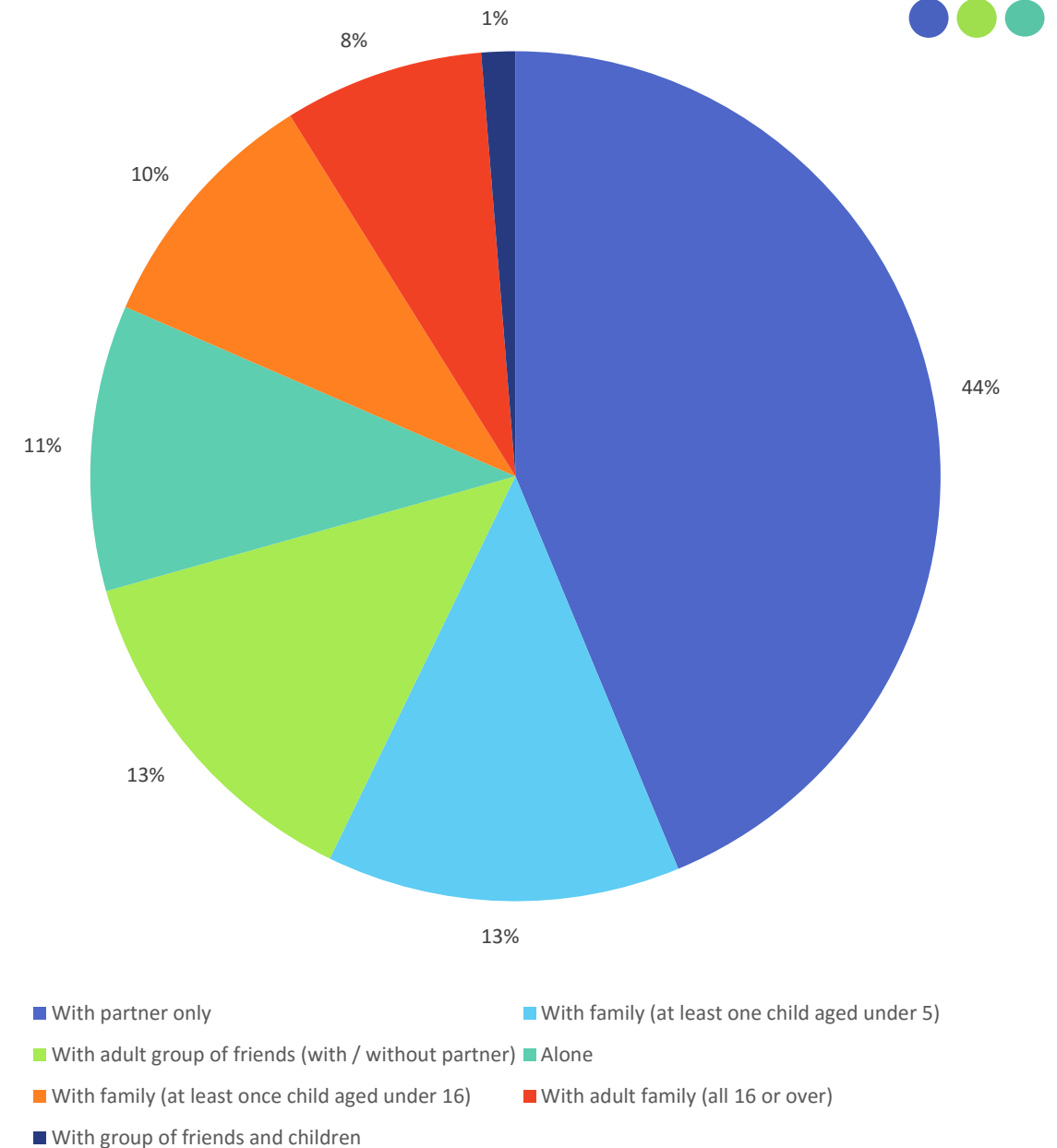


- 68% of respondents would take a short break to Lincolnshire
- 29% would take a day trip, and the remaining 13 would take a longer holiday (4 nights or more)
- This matches the known trend for UK breaks/holidays
- Those who said that they would go for a short break or holiday were asked what type of accommodation they would stay in
- Chain hotels and self catering apartments/cottages stand out as the top two choices of accommodation



# TYPE OF TRIP CONTINUED

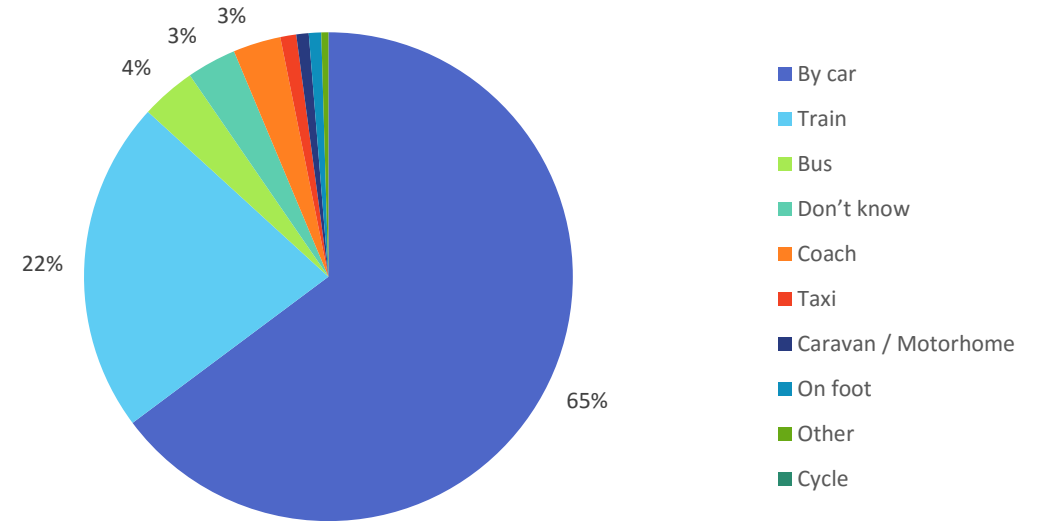
- 44% of respondents said that they would visit Lincolnshire with their partner only – this is even higher when looking at the older side of the market who have no children living at home (55%)
- 23% of visitors would visit with family, including children under the age of 16
- 14% would visit with an adult only group of friends
- 11% would visit alone



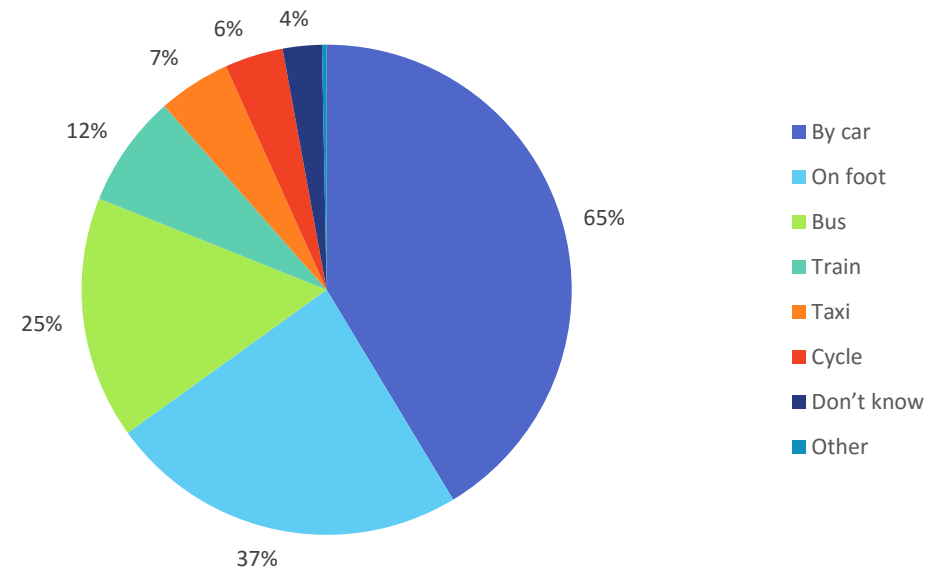
# TRAVEL

- Car is the most popular mode of transport, both to Lincolnshire and around Lincolnshire
- Once in Lincolnshire, potential visitors are then more likely to walk or make use of public transport services

Travel to Lincolnshire



Travel around Lincolnshire

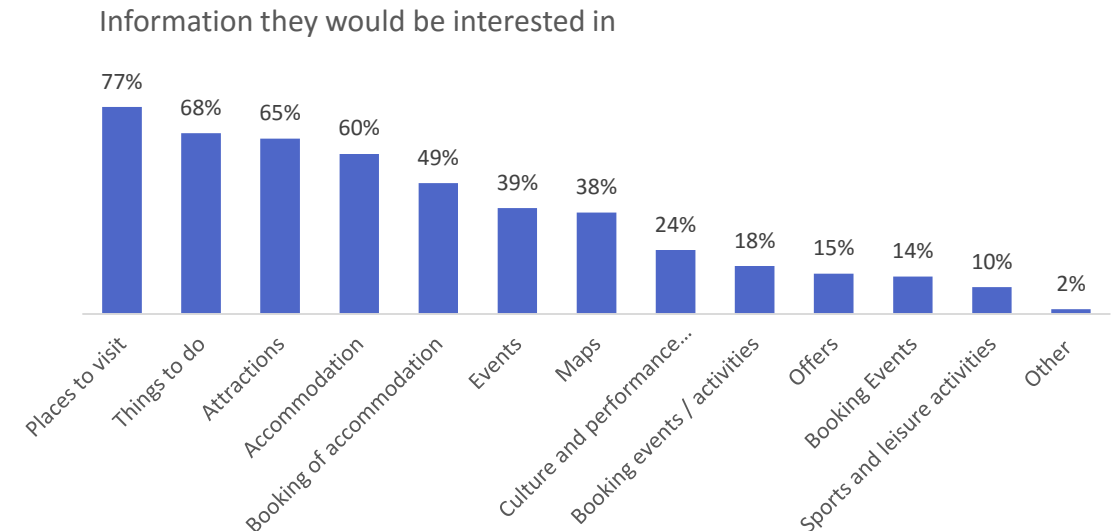
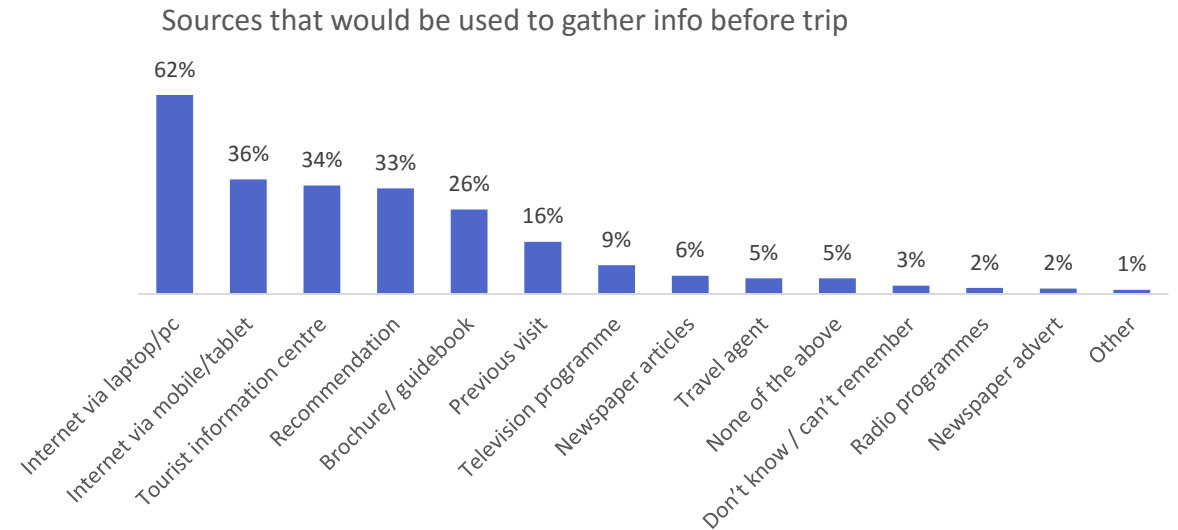




# INFORMATION GATHERING – BEFORE TRIP



- Respondents were asked if they were to take a trip to Lincolnshire, which information sources they would use before the trip to help them plan
- The internet was the most commonly used source, with 62% using the internet via laptop or PC, and 36% via mobile/tablet
- Planning what they will do on the trip is the key information they'd be seeking
  - Places to visit
  - Things to do
  - Attractions



# INFORMATION GATHERING – DURING TRIP

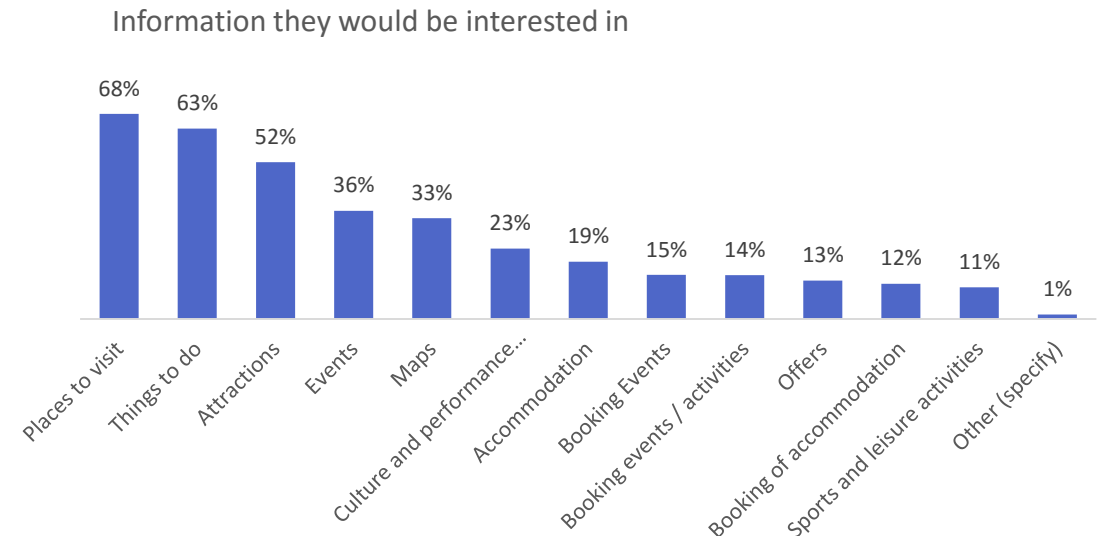
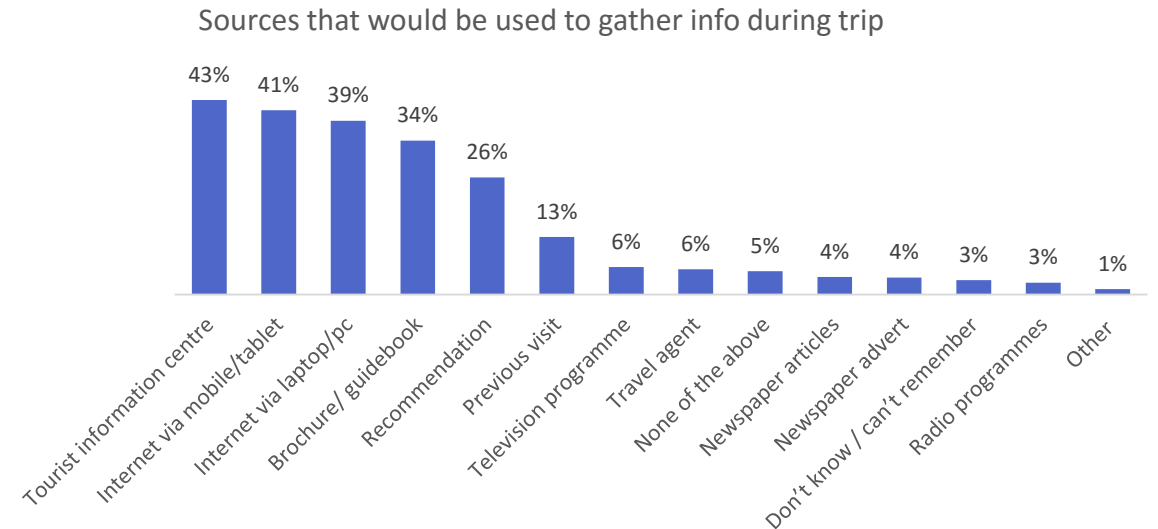


Once on the trip, respondents were more likely to say that they would use a TIC if they were to visit Lincolnshire

However, if we combine the number of people using the internet via both mobile devices or computers, we find the internet is still the most used source, with 57% of the sample using the internet during their trip to gather information

The key types of information that they would be looking for remain the same

- Places to visit
- Things to do
- Attractions



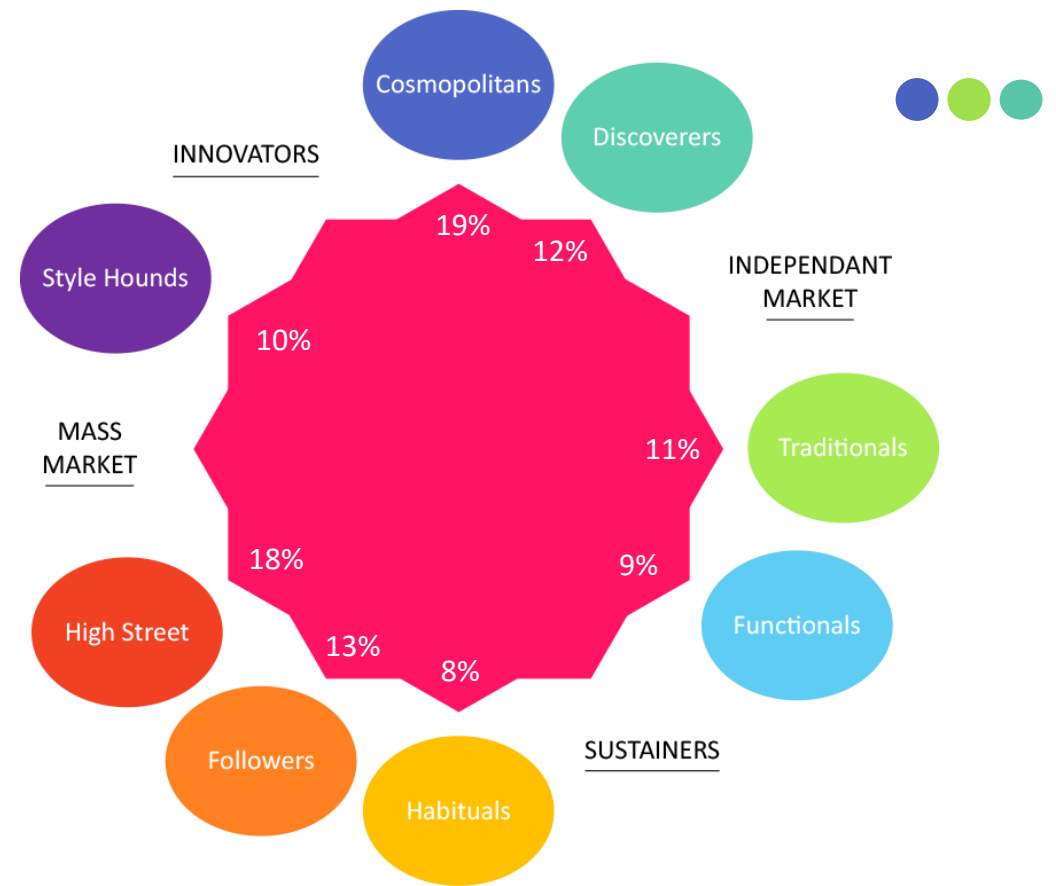
# SUMMARY



- ▲ The two key reasons that people have not visited Lincolnshire are
  - ▲ Not knowing enough about it
  - ▲ There are other places they would like to visit
- ▲ Amongst non-visitors, knowledge of the area is fairly low. When asked about their associations with Lincolnshire we found that only a small proportion of the sample had any strong associations or perceptions of the area
- ▲ Natural coastlines is what Lincolnshire is best known for amongst non-visitors
- ▲ After seeing a list of the types of things that Lincolnshire offers, only 11% of the sample said that they would not consider visiting
- ▲ The key draws to the area are things to see, such as
  - ▲ Scenery
  - ▲ Historic architecture and towns
  - ▲ Culture

# ARKLEISURE

- ▶ A key element of our approach is the ArkLeisure segmentation
- ▶ ArkLeisure is a whole-market research-based segmentation of the UK holiday market, which has been consistently updated since its inception in 2002 (the latest update being May 2016), and is focused on values and attitudes of UK consumers to leisure opportunities. What this means is that it differs from other market segmentations in the following ways:
  - ▶ Being values-based, rather than demographics or life-stage, it provides a wealth of information about the motivations of individuals in each segment which allows marketers to target segments by what they like, through media they prefer, with messages that appeal to their values.
  - ▶ Being part of the on-going portfolio of tourism research that Arkenford have carried out for Visit Britain and England, and most of the UK's regional tourism bodies, hundreds of thousands of interviews have ensured that the data is as rich as it is deep- we know who does what, and why.
  - ▶ ArkLeisure clearly separates the mass-market from the independent market, according to their values. It does the same for those willing to take risks on new options vs. those who are risk averse. This identifies the sectors of the UK market who are willing to try new things, and who prefer not to book through mass-market advertising and channels.



# ARKLEISURE IN LINCOLNSHIRE



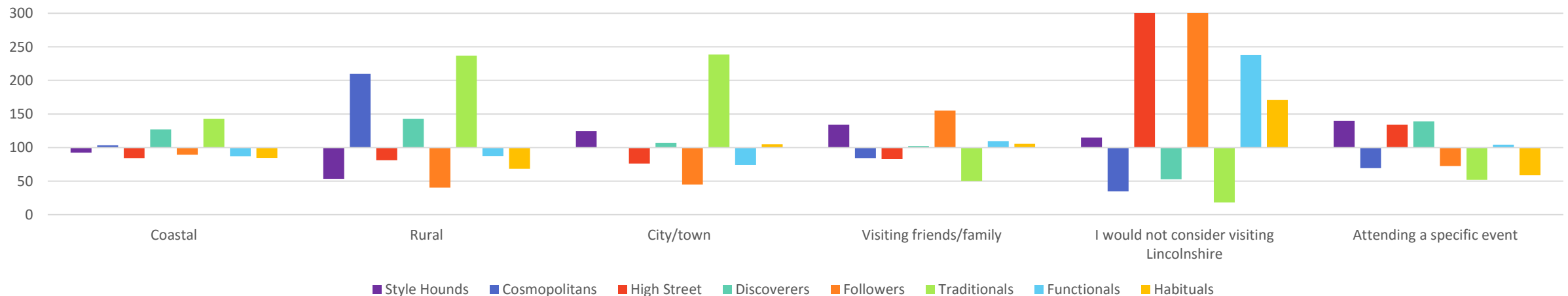
- ▶ We know from the visitor research carried out in 2016 that Functionals and Traditionals are the most likely segments to say that they have visited Lincolnshire in the last 2 years
  - ▶ These segments are on the independent side of the market – they are self reliant and hold traditional values, and have an interest in arts and culture
- ▶ We also know that Cosmopolitans and High Streets are likely to have visited Lincolnshire, but it is more likely to be over 2 years ago
  - ▶ Cosmopolitans are also an independently minded segment, they live life to the full and enjoy new experiences
  - ▶ High Streets, on the other hand, prefer to be advised rather than decide things for themselves, but they are still an active segment who have some appreciation of arts and culture
- ▶ These were also the 4 segments amongst non visitors (considerers) in the 2016 survey who were most likely to say that would be interested in visiting



# ARKLEISURE IN LINCOLNSHIRE CONTINUED



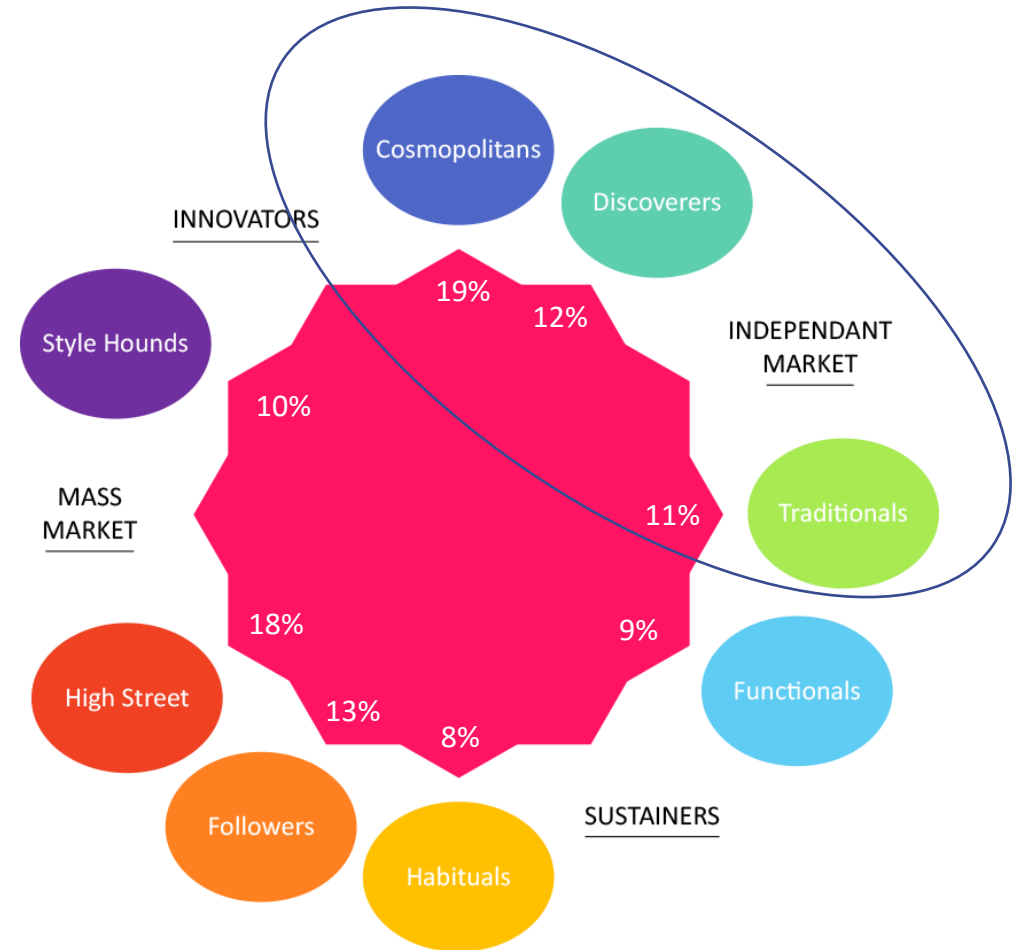
- △ The index chart below shows how likely, compared to average, each ArkLeisure segment is to take each type of holiday in Lincolnshire based on the non-visitor survey data
- △ Coastal breaks is fairly flat, showing there isn't much difference across segments in terms of who would take this type of break
- △ Cosmopolitans and Traditionals are far more likely than average to take a rural break, and Traditionals would also be interested in a city/town break
- △ Cosmopolitans, Discoverers and Traditionals are least likely to say they would not consider a visit
- △ High Streets and Followers are least likely to consider a visit
  - △ It is likely that the reason we are seeing more High Streets in the Visitor Survey is because the Visitor Survey was sent out by various organisations within Lincolnshire – if any of these are big brand names within the county then they are likely to have a high number of High Streets on their database. For the non-visitor research, the respondents were collected via a survey panel. High Streets act on recommendations or media coverage, so if Lincolnshire is not being recommended they will be unlikely to consider a visit.



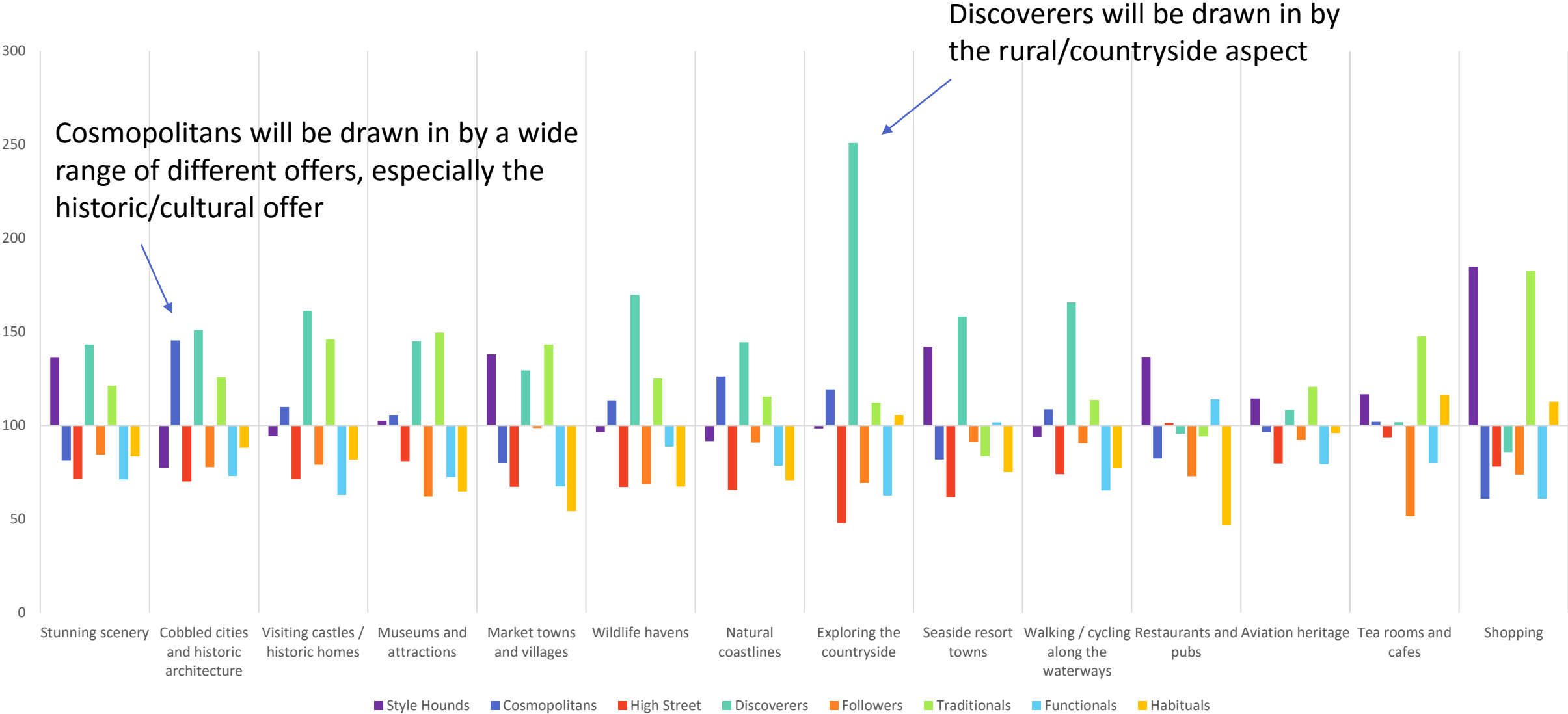
# WHO TO TARGET



- ▶ The findings of this survey support what we already know from the visitor research – Cosmopolitans and Traditionals continue to be target segments for Lincolnshire, however Functionals less so
- ▶ This research also identifies a new segment to target, Discoverers, who we previously found were unlikely to have visited Lincolnshire.
- ▶ The index chart on the following slide shows the key offers which would encourage a visit by segment
- ▶ Lincolnshire's history and heritage as well as nature attractions will attract Traditionals and Discoverers
- ▶ Cosmopolitans will give anything a go and are very interested in trying new things
- ▶ We would expect given what Lincolnshire offers in terms of rural and coastal locations as well as history and heritage that more Functionals would say they are interested in visiting.
  - ▶ It is likely that raising awareness of Lincolnshire's offer in these areas, as well as highlighting the value for money aspect, would help to get Lincolnshire higher on Functional's list of places to visit.



# ENCOURAGING A VISIT





# THANK YOU

Lincolnshire Non-Visitor Research

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