Alongside the currently running Cornwall visitor survey, Arkenford were commissioned to carry out an additional sample of visitors from overseas locations.

The additional overseas sample has been combined with the current visitor survey data for the year to date. This has left us with a sample of:

The interviews were completed in the same way as the current visitor survey. These are face to face interviews conducted by a team of experienced fieldwork interviewers over the course of 2 months during the Summer. Respondents had to be aged over 16 and, for this specific sample, be a visitor from outside the UK.
Overall it is Other Overseas visitors who are enjoying that trips to Cornwall more than those from Europe. 78% of those from Other Overseas destinations are scoring 4 or 5 out of 5 for their level of enjoyment (68% for Europe). This may explain why the number of first time visitors from Other Overseas destinations (56%) is less than from Europe (62%) even with the greater distance.

In terms of the visitor profile, the majority of visitors from outside the UK fit in with the UK trend of visitors. These are elderly independent travellers. However, Europe and Other Overseas visitors do show leaning towards two other groups:
- For Other Overseas travellers we are seeing a trend of younger groups of friends visiting the region.
- For Europeans there is a stronger proportion of families that are visiting.
Figures for overseas visitors (taken from Visit Britain) show that the number of visitors to the UK has gone up in 2014 compared to the last 2 years.

Looking more specifically at holiday trips, for the year to date (up to September) there has been an increase of 7% on the same period in 2013.
Figures for overseas visitors (taken from Visit Britain) show that the number of visitors to the UK has gone up 33% from figures recorded in 2003.

A similar level was seen in 2006.
### Context

Top ten markets by volume

<table>
<thead>
<tr>
<th>Visits (000s)</th>
<th>% of all visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>3,930</td>
</tr>
<tr>
<td>Germany</td>
<td>3,162</td>
</tr>
<tr>
<td>USA</td>
<td>2,791</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>2,395</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,922</td>
</tr>
<tr>
<td>Spain</td>
<td>1,704</td>
</tr>
<tr>
<td>Italy</td>
<td>1,666</td>
</tr>
<tr>
<td>Poland</td>
<td>1,357</td>
</tr>
<tr>
<td>Belgium</td>
<td>1,188</td>
</tr>
<tr>
<td>Australia</td>
<td>1,070</td>
</tr>
</tbody>
</table>

### Top 10 markets by value

<table>
<thead>
<tr>
<th>Spend (£millions)</th>
<th>% of all spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>£2,548</td>
</tr>
<tr>
<td>Germany</td>
<td>£1,408</td>
</tr>
<tr>
<td>France</td>
<td>£1,350</td>
</tr>
<tr>
<td>Australia</td>
<td>£1,194</td>
</tr>
<tr>
<td>Spain</td>
<td>£905</td>
</tr>
<tr>
<td>Italy</td>
<td>£830</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>£818</td>
</tr>
<tr>
<td>Netherlands</td>
<td>£720</td>
</tr>
<tr>
<td>Norway</td>
<td>£537</td>
</tr>
<tr>
<td>Canada</td>
<td>£533</td>
</tr>
</tbody>
</table>

- The data shown above is again taken from the Visit Britain.

- The data shows the top 10 markets to the UK for 2013 to give an idea of where overseas visitors are coming from for the UK in general.

- This report will detail where visitors to Cornwall are primarily coming from and can be compared to the total for the whole of the UK.
The UK visitor profile shows a leaning to those over the age of 45, in fact they make up 73% of all visitors.

The profile shifts to a younger audience for both European and Other Overseas travellers compared to UK visitors.

37% of Other Overseas visitors were young independents (under 35 with no kids living at home).

Only 5% of all Other Overseas visitors have children under 16 at home.

Families showed the greatest shift for those from Europe, they represented nearly a quarter of visitors.
We have already established the younger age of the other Overseas visitors and the greater proportion than average of families for those visiting from Europe.

Looking at the group composition, the majority still visit with their spouse/partner (roughly 45%).

However, family only visitors make up 38% of European visitors and there is a greater proportion of groups of friends travelling from other International destinations (18%).

This is supported when looking at the SEG of the visitors. The largest proportion for both European and other overseas visitors is in the C1 sector.

- Represents those in the middle lower class and also students are included in this SEG.
Germany is the most popular country outside the UK where visitors to Cornwall originate (31%) .

59% of European visitors are from Germany.
16% are from the Netherlands.

For Other Overseas countries, Cornwall proves most popular amongst those from Australia with 16% of all visits.

Out of Other Overseas destinations, Australia makes up 34% of visits.
USA makes up 19%.
China also has a few visitors at 12%.

The table to the left shows the breakdown of all the responses to the question.
The majority of visitors to Cornwall have been to the place before (69%). A slightly higher proportion of European visitors are on their first visit (62%) compared with Other Overseas visitors (56%).

20% of visits from the UK are on their first visit.

Visitors from the UK return much more frequently; 51% of returning UK visitors last visited Cornwall less than 12 months ago. By contrast, almost half of returning European (43%) and Other Overseas (44%) visitors have not visited in the last 5 years.

Previous visits

Proportion of returning visitors and time since last visit

When was your last visit to Cornwall?

- Within the last month
- Within the last six months
- Within the last twelve months
- 1-2 years
- 3-4 years
- 5 or more years ago
- Can't remember

Proportion of first time visitors

- UK: 20%
- Europe: 62%
- Other Overseas: 56%
Respondents were asked to rate the extent to which they associate Cornwall with a number of categories.

A large proportion of all visitors associated Cornwall with ‘A welcoming place to visit’ and ‘History & Heritage’.

UK visitors tended to have higher levels of association with most statements, followed by Other Overseas visitors, then European visitors. This possibly shows that Other Overseas visitors have done more research on the area as they are coming from further afield.
Respondents were asked whether a number of factors influenced their decision to visit Cornwall, and whether they were their main reason for visiting.

The beauty of the natural landscape had a universally high degree of influence on visitors (55% UK, 72% European and 74% Other Overseas).

Other strong influences on UK visitors that were less apparent for European and Other Overseas visitors were previous visits to the area (79%), and their perception of Cornwall as peaceful, relaxing and quiet (45%).

Word of mouth/recommendation had a greater influence on Other Overseas (34%) compared with UK (7%) and European (17%) visitors.

These trends were reflected in the ‘main reasons’ to visit, with half of UK visitors citing their enjoyment of previous visits, and almost 40% of those outside the UK citing the beauty of the natural landscape.
The role of the visit

- The majority of Other Overseas visitors considered their trip to be their main holiday of the year (76%), but stayed less than a week (73%).
- This possibly suggests their stay was part of a wider trip, perhaps travelling around the UK.

- Regardless of the length of stay, the vast majority of all visitors said that the main purpose of their trip was leisure (between 88% and 95%).
- Most of the remaining visitors were visiting family or friends.
The type of accommodation with the highest combined proportion of visitors is self-catered. However, this is driven largely by UK visitors.

Overseas visitors are much more likely to stay in B&Bs (49% of Other Overseas and 27% of European visitors) and hotels (21% of Other Overseas and 18% of European visitors).

This preference could be due to the high proportion of overseas visitors gathering information from travel agents and guidebooks (slide 20), as well as the shorter time they stay in the area.
Respondents were asked which towns they had visited, or planned to visit as part of their stay. This graph sorts the information by proportion of UK visitors.

St. Ives is particularly popular with all visitors, particularly European visitors, of which 76% had visited the town or planned to at least once during their stay.

A number of towns were much more likely to be visited by overseas visitors, the greatest differences being seen at Penzance and Boscastle to name two.

Overseas visitors express a greater interest in visiting larger towns and cities than UK visitors (slide 16), which likely reflects the fact that UK visitors are looking for a quieter, more relaxed stay.
Respondents were also asked which attractions they had visited or planned to visit as part of their stay. This chart sorts this information by the attractions most popular with UK visitors.

Visitors outside the UK demonstrate a higher level of interest in a number of activities, such as Heritage sites, Museums, Art Galleries and Theatres, despite these things not strongly influencing their decision to visit Cornwall.

UK visitors have lower levels of interest in most attractions.

The lower level of interest in sight-seeing of UK visitors likely reflects the higher proportion of returning visitors and their greater interest in a quieter, more relaxing stays.
Visitors were asked to rate the value for money of accommodation, eating out in pubs and restaurants, and activities on a 5 point scale from 1 (‘Very poor’) to 5 (‘Excellent’).

The results in these graphs display banded scores (Negative = 1,2; Positive = 4,5)

A very similar pattern was found across all rating categories, with ratings of value for money tending to be positive or neutral. European visitors gave slightly more negative ratings in general than UK and Other Overseas visitors.

14% of European visitors rated overall value for money negatively, compared with 2% of UK and 0% of Other Overseas visitors. In contrast, nearly 40% of Other Overseas visitors rated overall value for money as Excellent.
Although all visitors were generally very positive about their trip to Cornwall, visitors from the UK were particularly positive. 51% of UK visitors rated their overall experience as ‘Excellent’, compared with 25% of Other Overseas visitors and 16% of European visitors.

The greater rating by UK visitors is likely due to a greater proportion of repeat visitors that know what to expect (we can see that 61% stated the trip was the same as expected).

Visitors generally felt that their experience either lived up to or slightly exceeded their expectations, particularly Other Overseas visitors, 54% of which felt that their trip was ‘Better’ or ‘Much better’ than they expected.

All visitors were very likely to recommend Cornwall as a holiday destination; 85% of UK and 56% of overseas visitors stated that they would ‘Definitely’ recommend.
UK visitors remain particularly positive when asked whether they would consider taking another holiday or short break in Cornwall. 81% say they will definitely be back, compared with 41% of European and 33% of Other Overseas visitors. The latter appear to be slightly more tentative, with 18% saying that they will either ‘Probably not’ or ‘Definitely not’ return.

The lower number of returning Other Overseas visitors may also reflect the greater distance and cost of travelling.

When asked to compare Cornwall with other destinations, there is slightly more variation in results, although these still tend to be positive. 48% of Other Overseas visitors stated that Cornwall is ‘the same’ as other destinations, compared with 42% of European and 30% of UK visitors.

Overall the vast majority of visitors outside the UK rate it as being the same or better than other destinations (95%)
Before the trip

Methods of information gathering

- The graph to the left has been sorted from top to bottom by the popularity for all respondents from the UK, Europe and other overseas destinations.

- For UK visitors, previous visits play a large part but for those outside the UK, they are more likely to be on their first visit.

- Therefore, there are two stand out avenues for information for both European and Other Overseas visitors:
  - The internet via a laptop
  - Brochures/guidebooks

- Recommendations and travel agents plays a more important role for those Other Overseas travellers than they do for Europeans or those from the UK.
The graph to the left shows what information was gathered off the internet before the trip.

Accommodation information is most sought by all those outside the UK.
- 71% searched for accommodation-related information.

Europeans are a lot more active in their search for inspirational ideas.
- They look for places, attractions, and things to do a lot more frequently than Other Overseas visitors.
During the trip, still a large proportion of those from Other Overseas destinations collect some sort of information (89%).

Europeans are less likely to collect information (71%) but still more than UK visitors.

When on the trip the most popular method for those from outside the UK is to use a brochure or guidebook.

There is a definite shift from mainly online information to offline information when at the destination.
During the trip, those visitors from outside the UK are still looking for more inspirational ideas on places to go and things to do than the UK visitors.

 Likely based around the fact less people are using their previous visits for information.

European visitors were more likely to be seen looking for places to go and things to do before the trip, so it is no surprise to see those from Other Overseas destinations to be looking for this information more during the trip.
We established what information people look for on the internet but the graph above shows where people go for this information.

Accommodation specific websites prove the most popular for all visits, regardless of their origin.

General Cornwall websites are used more often by European travellers and Other Overseas travellers use general review sites more often than UK and European visitors.
Both before and during the trip, the vast majority of visitors from any location find information easily.

UK visitors found information easier, followed by Europeans and then discovering it hardest were those from further a field.
67% of visitors from Other Overseas destinations are not aware of the Visit Cornwall website.

- For Europeans the figure is only slightly worse than in the UK (52%).

- For visitors outside of the UK, they are using the website mainly for maps and planning on the holiday, so for practical reasons rather than inspiration.

- This is the opposite for those visiting from the UK.
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