

Cornwall Visitor Survey 2016

Quarterly Update Report Summer & Autumn Interviewing Periods 2016



Produced for and on behalf of Visit Cornwall

By

The South West Research Company Ltd.



December 2016



Background

Cornwall has been consistently voted one of Britain's top tourist destinations and in 2014 attracted approximately 4.3m staying visitors and 14.7m day visitors generating £2.6bn of business turnover in the county economy and supporting 53,000 jobs. Visit Cornwall, which is the tourist board for Cornwall, is committed to building on this success and seizing every opportunity to continue to make Cornwall a quality destination of choice. It is recognised that Cornwall's economy will always have a strong tourism element (as part of a balanced Cornish economy) and the continuing challenge is to increase the contribution tourism makes.

A key priority for Visit Cornwall is to identify the needs of visitors to Cornwall to ensure continuous improvement of the visitor experience and, as such, they have carried out a visitor survey for over 17 years for this purpose. The Cornwall Visitor survey looks at a range of visitor information including profile, motivation, level of satisfaction etc. and is a valuable piece of work which steers their marketing strategy, makes recommendations for product development and identifies emerging trends. Visit Cornwall now wishes to engage a contractor to carry out the Cornwall Visitor Survey over a twelve month period covering 2016 and 2017.

This quarterly update report for the ongoing Cornwall Visitor Survey 2016 contains a summary of the key findings for the survey for the summer (August 2016) and autumn (September, October and November 2016) interviewing periods.

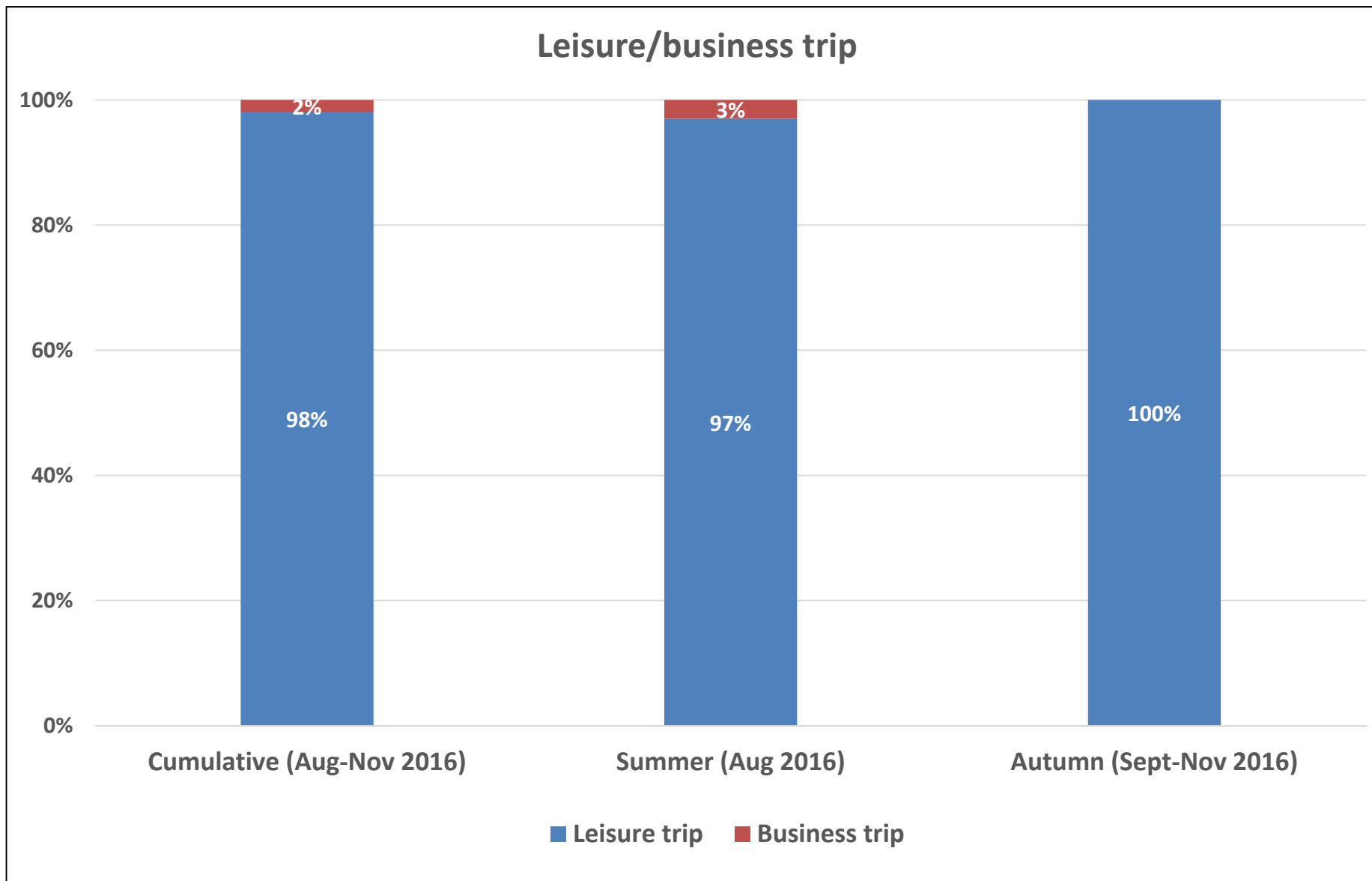
The summer interviews covered the month of August only and included a sample of 193 face to face interviews across the county. The autumn interviews included the months of September, October and November and a sample of 213 face to face interviews.

This report has been produced by the South West Research Company (TSWRC) on behalf of Visit Cornwall.

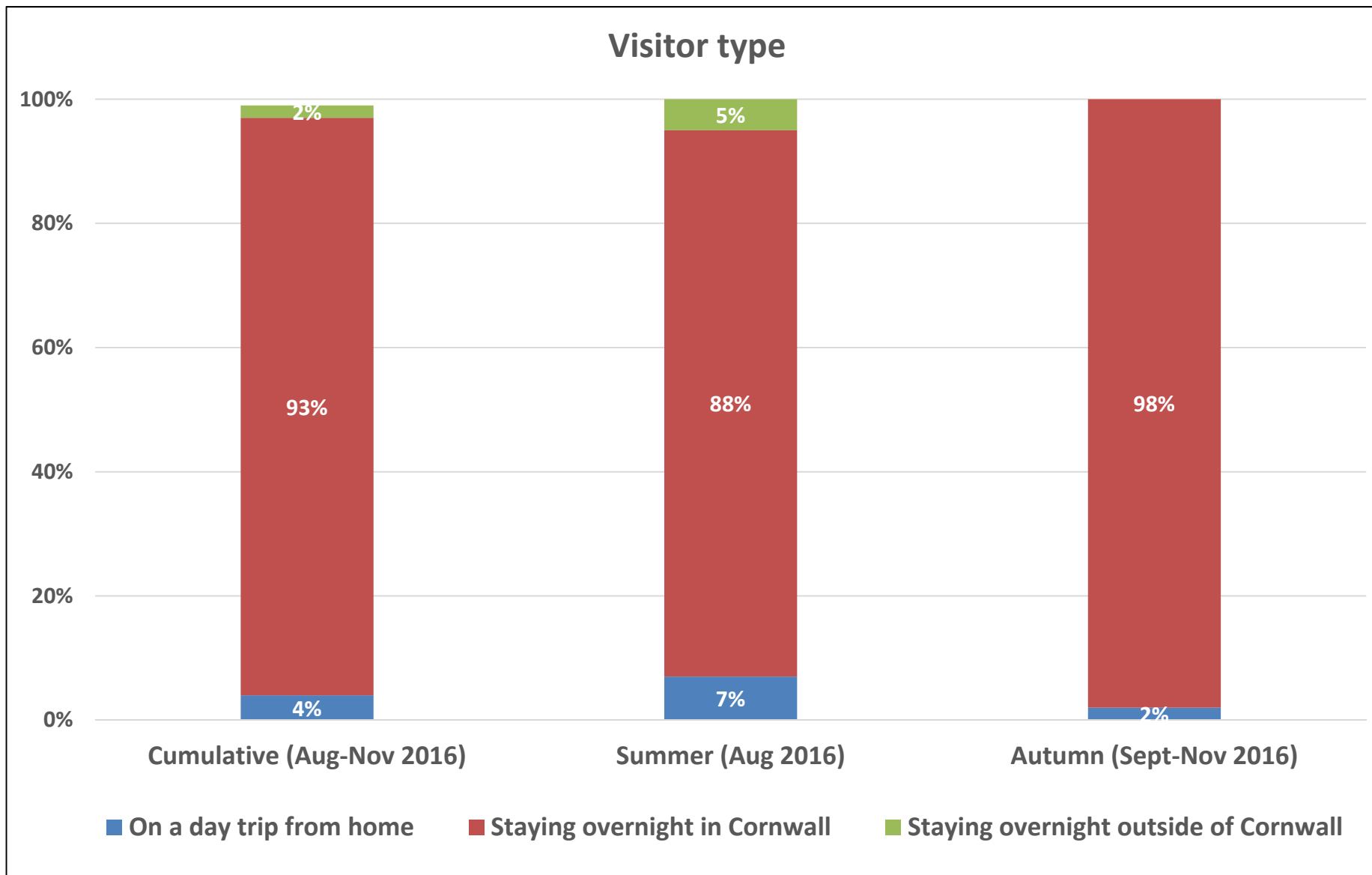
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Visitor Profile



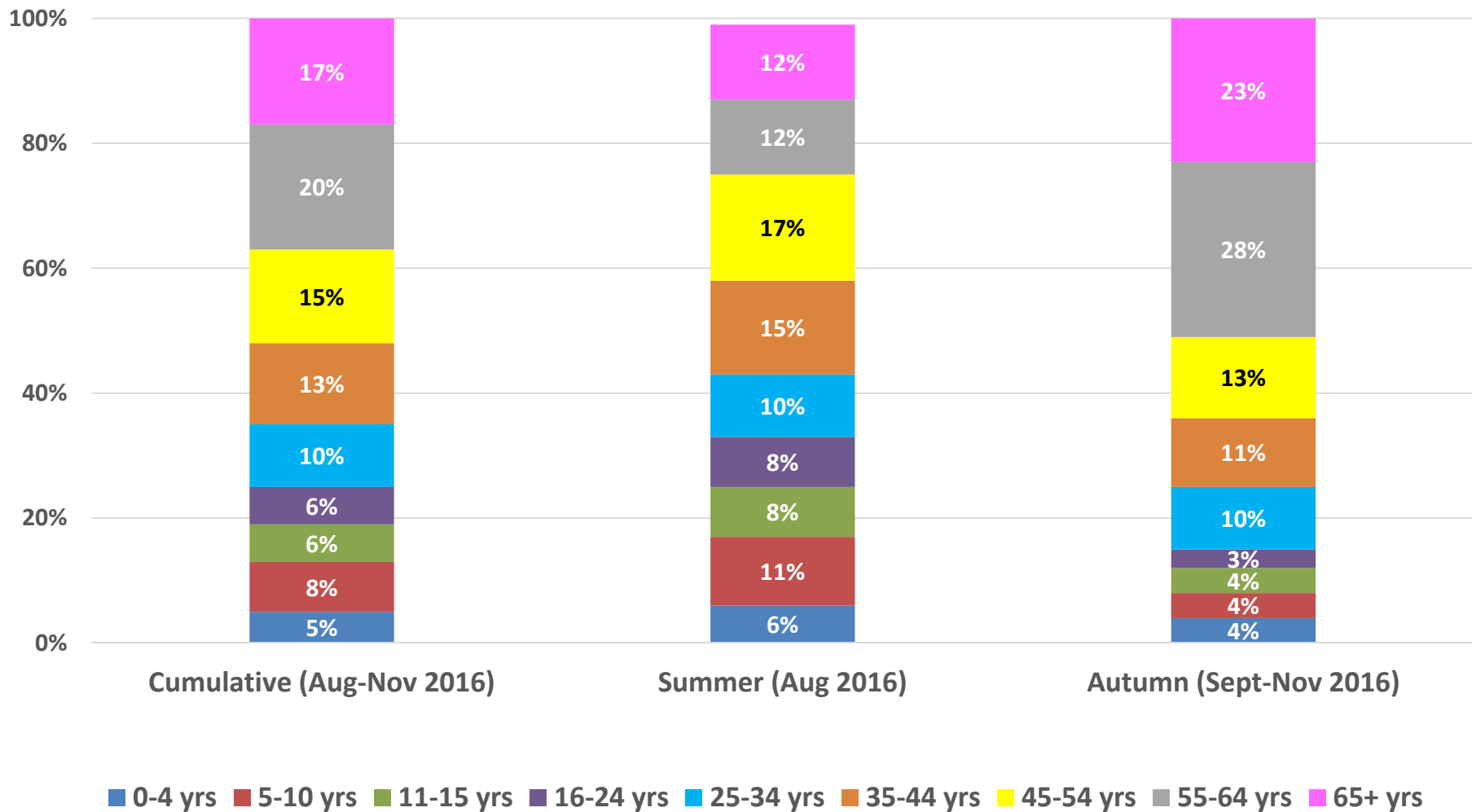


98% of all respondents considered themselves to be visiting Cornwall for leisure purposes including 97% and 100% of respondents during the summer and autumn periods respectively.



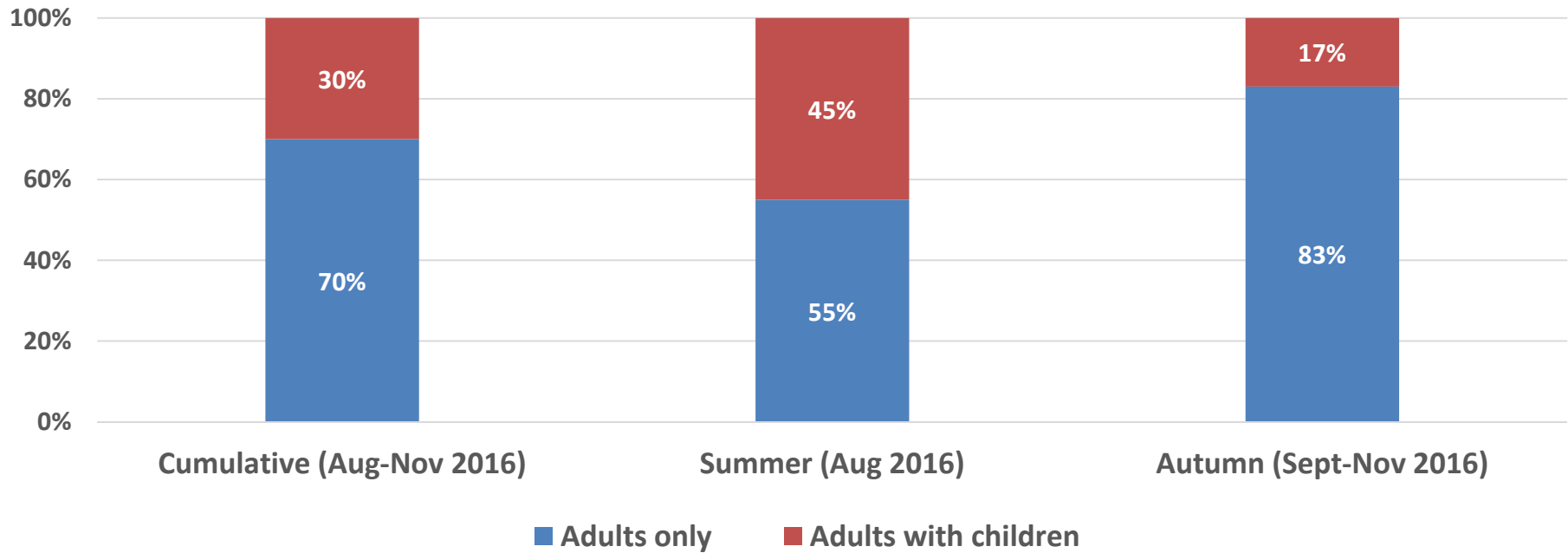
93% of all respondents were staying overnight in Cornwall during their visit including 88% and 98% of respondents during the summer and autumn periods respectively

Age group of party



37% of all visitors to Cornwall were aged 55+ years including 24% and 51% of visitors to Cornwall during the summer and autumn periods respectively. 19% of all visitors were children aged 15 years or under including 25% of visitors to the county during the summer period and 12% during the autumn period.

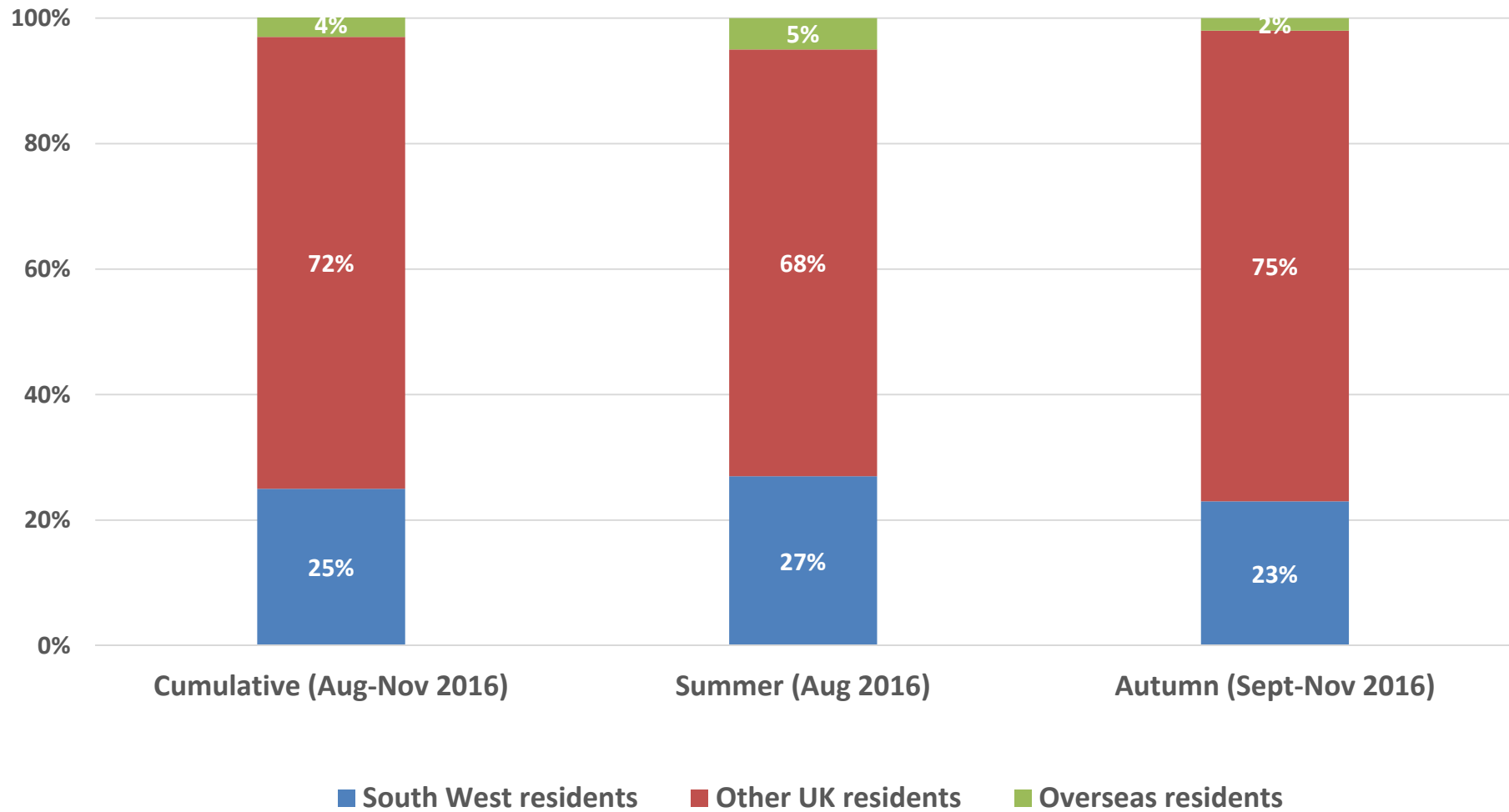
Group composition



Average group size	CUMULATIVE	SUMMER	AUTUMN
Ave. children	0.54	0.81	0.30
Ave. adults	2.33	2.34	2.32
Ave. group size	2.87	3.15	2.62

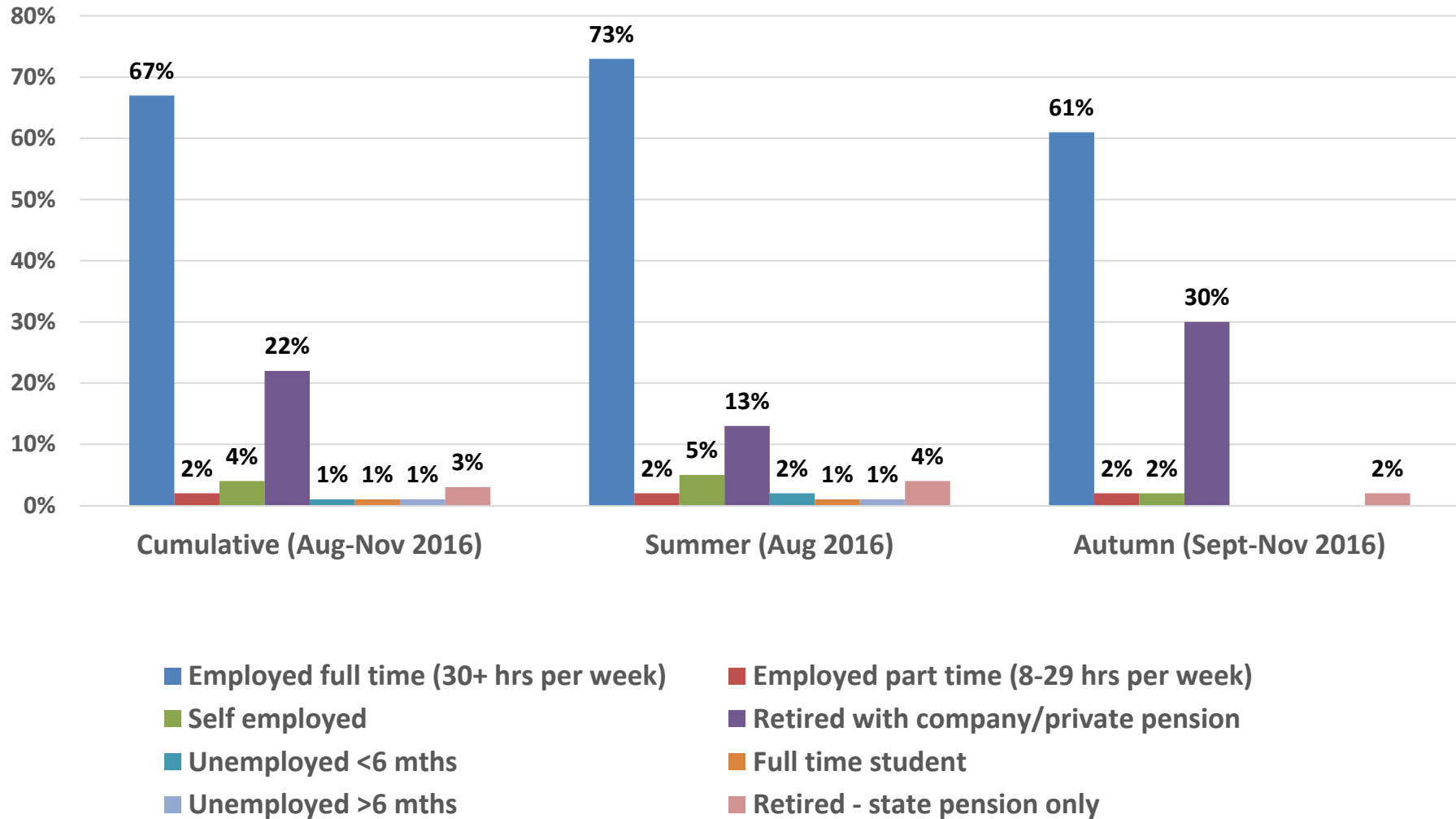
70% of all respondents were visiting Cornwall in an adult only group including 55% and 83% of respondents during the summer and autumn periods respectively. Average overall group size was 2.87 people and ranged from 3.15 people during the summer period to 2.62 people during the autumn.

Visitor origin



A quarter of all respondents were residents of the South West region including 27% and 23% of respondents during the summer and autumn periods respectively. 72% lived elsewhere in the UK (68% and 75% of summer and autumn respondents respectively). 4% of all respondents were from overseas including 5% and 2% of respondents during the summer and autumn periods respectively.

Chief income earner in household



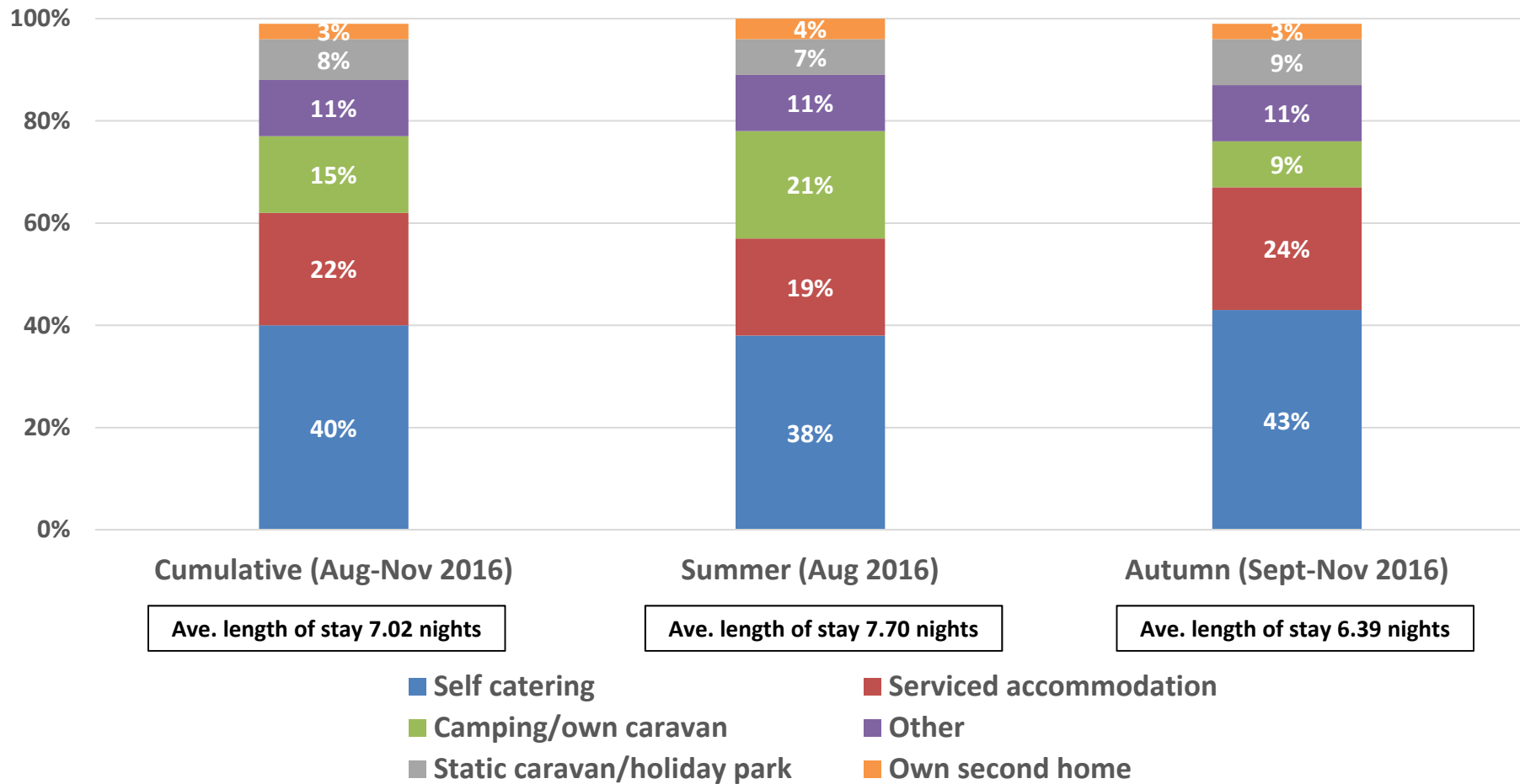
For 76% of all visitors the chief income earner in their household was employed full time (30+ hours per week) including 73% and 61% of respondents during the summer and autumn periods respectively. For 22% they were retired with a company/private pension (13% of summer and 30% of autumn respondents respectively).

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Staying Visitors

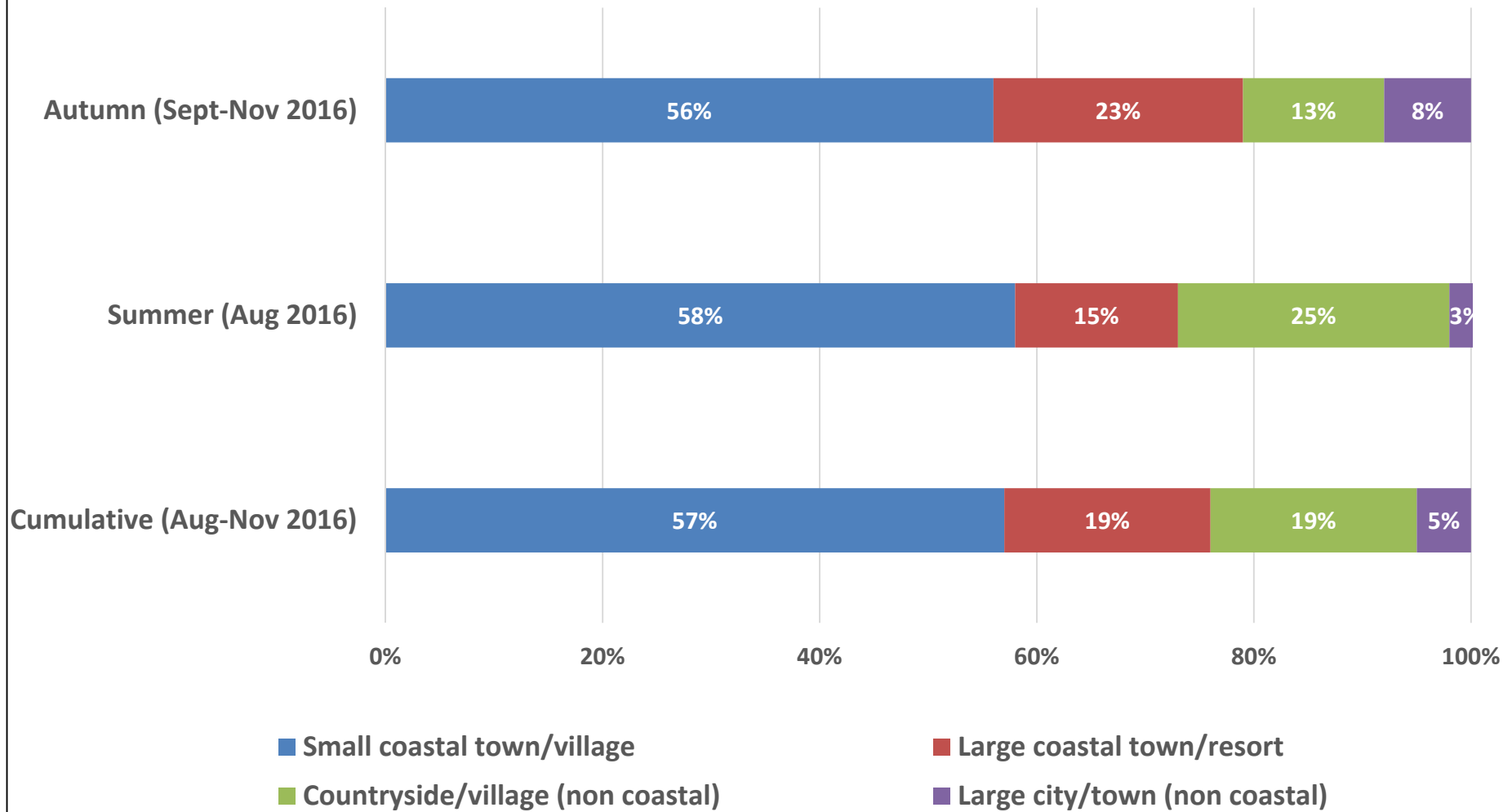


Accommodation used



40% of all staying visitors were staying in self catering accommodation in the county including 38% and 43% of respondents during the summer and autumn periods respectively. 22% were using serviced accommodation (19% of summer respondents and 24% of autumn respondents). 15% of all staying visitors were camping/using their own caravan in Cornwall including 21% of summer period and just 9% of autumn period respondents respectively. Average overall length of stay was 7.02 night and ranged from 7.70 nights during the summer period to 6.39 nights during the autumn period.

Type of area where staying



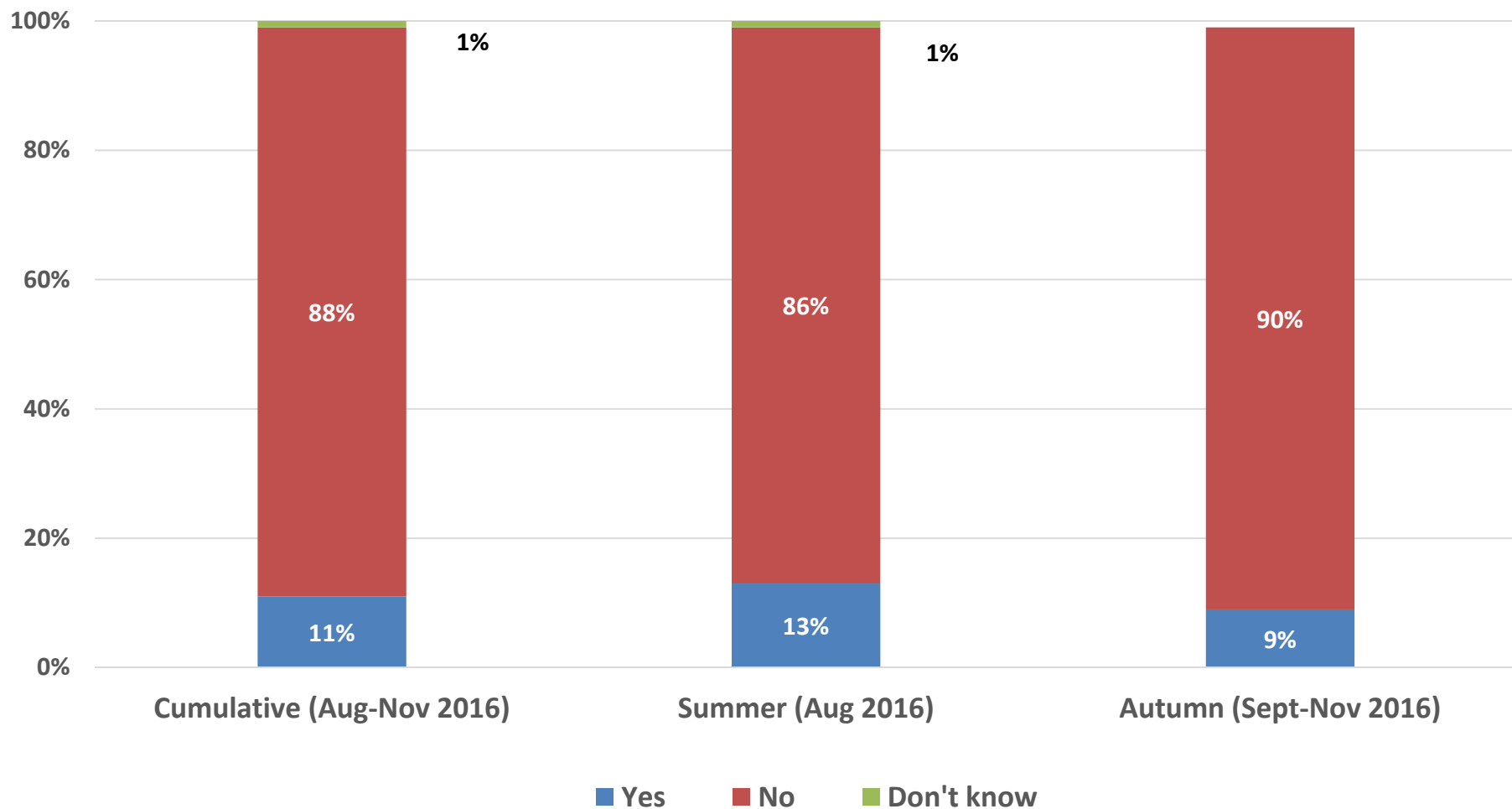
57% of all staying visitors were staying overnight in a small coastal town/village in Cornwall including 58% and 56% of respondents during the summer and autumn periods respectively .

Type of staying visit



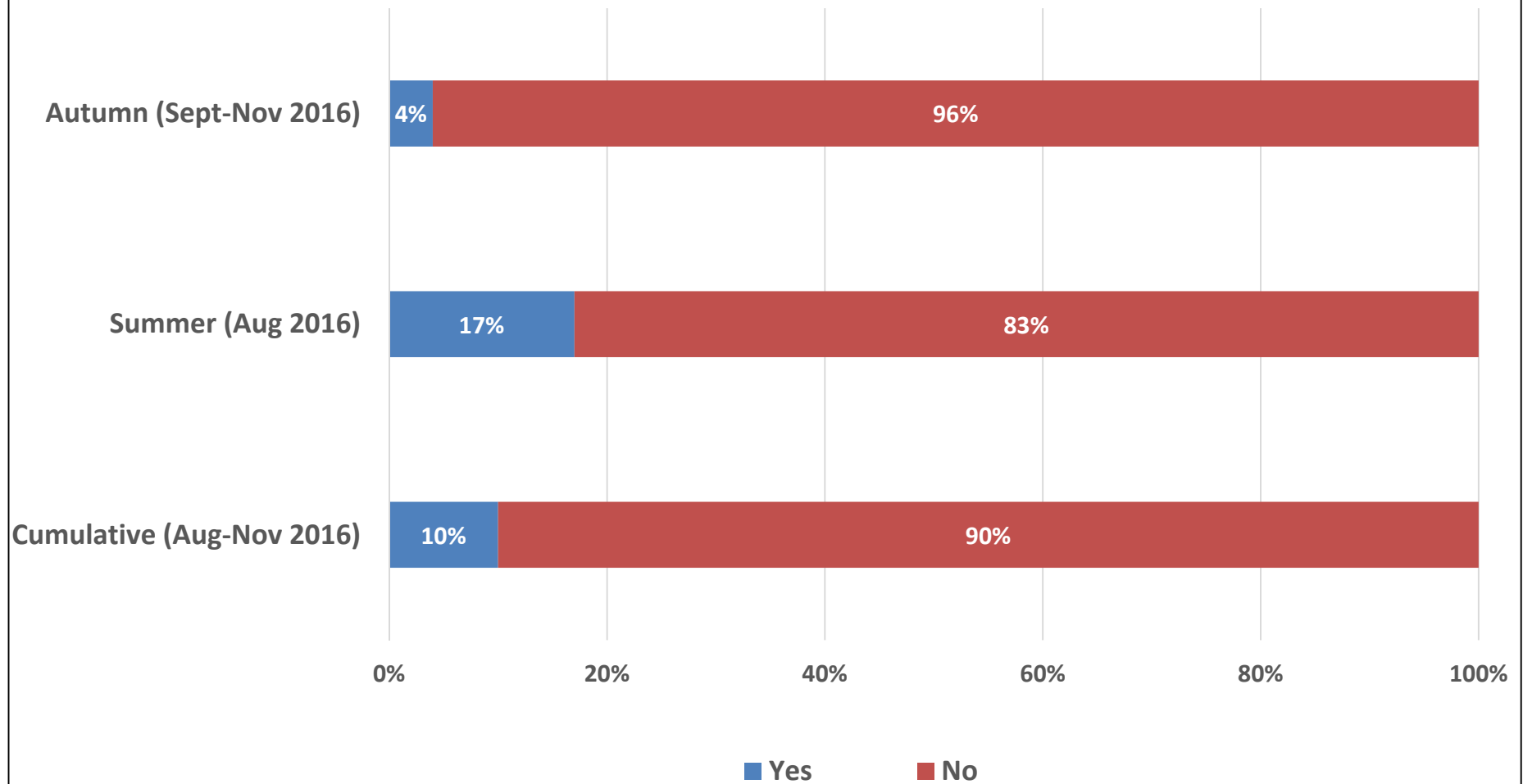
33% of all staying visitors were on their main holiday of the year to Cornwall including 44% of summer respondents and 24% of autumn respondents, 53% of whom were on a secondary/additional holiday to the county (44% of all staying visitors and 33% of summer respondents).

Whether staying trip to Cornwall replaced a holiday that would normally have been taken abroad



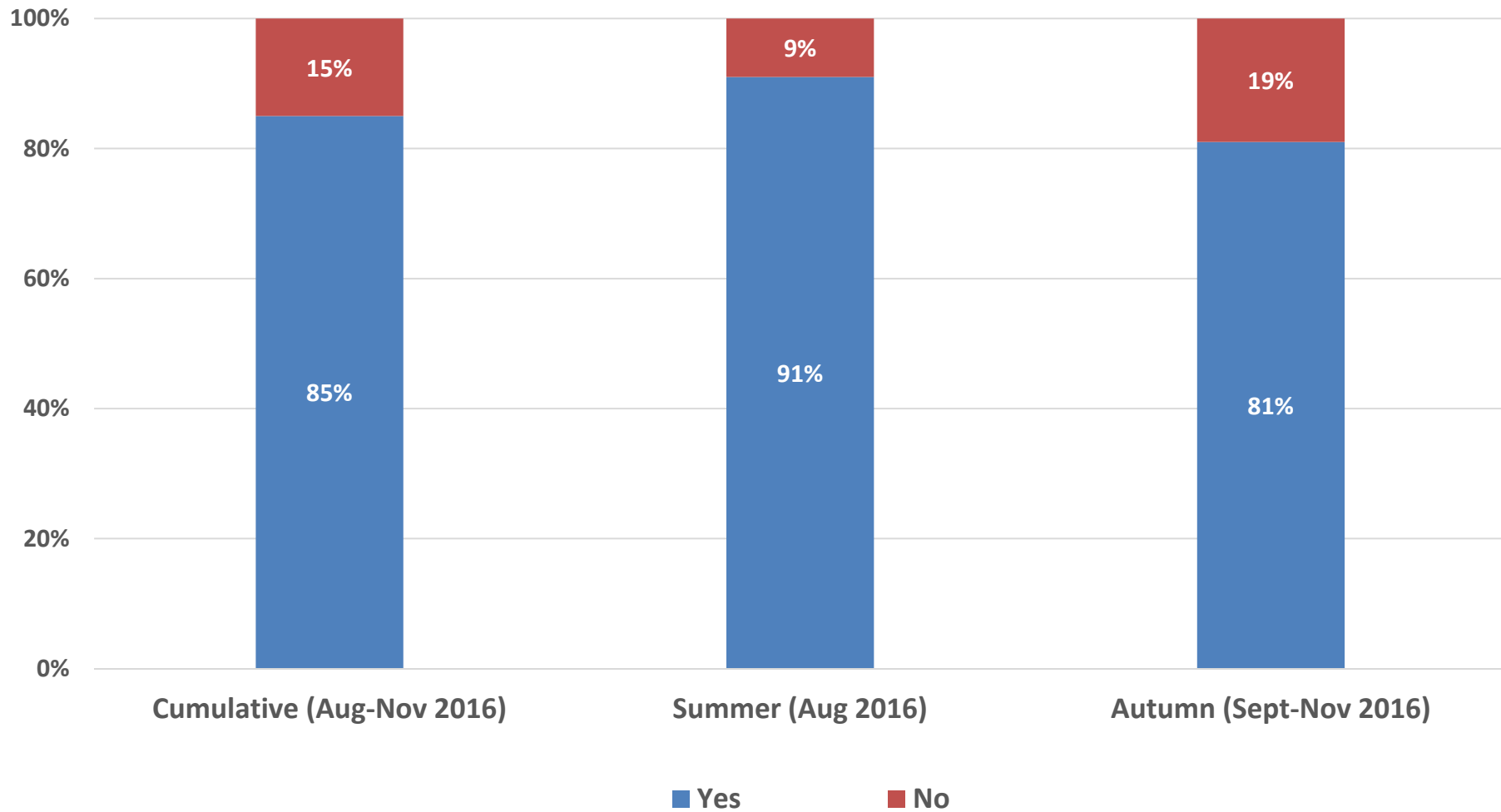
11% of all staying visitors (13% and 12% of summer and autumn respondents respectively) said their staying trip to Cornwall had replaced a holiday that they would normally have taken abroad.

Whether considered visiting any other places before deciding to visit Cornwall



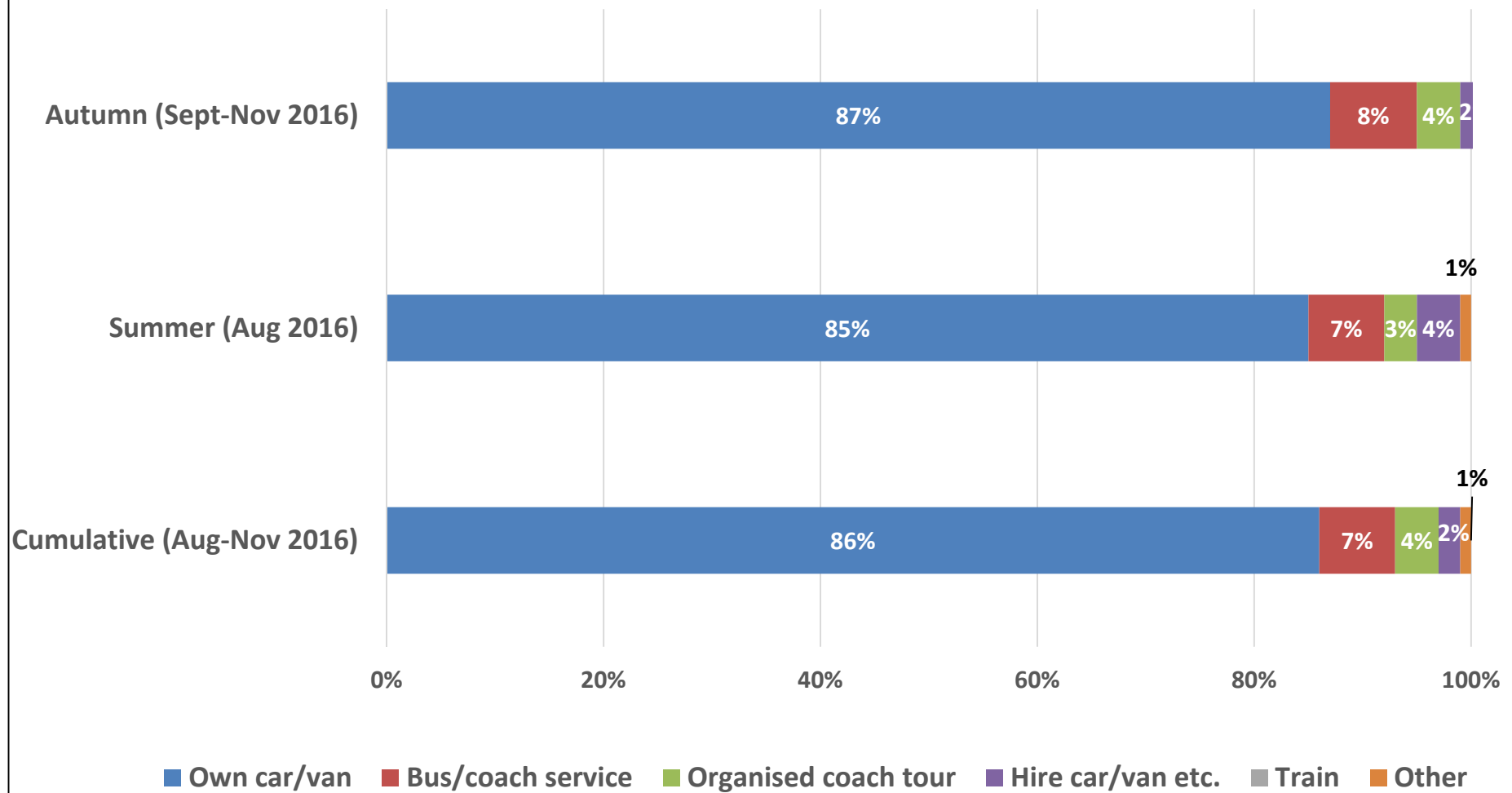
One in ten staying visitors had considered visiting other places before deciding to visit Cornwall including 17% and 11% of summer and autumn respondents respectively.

Whether travelling around Cornwall away from local area where accommodation is based



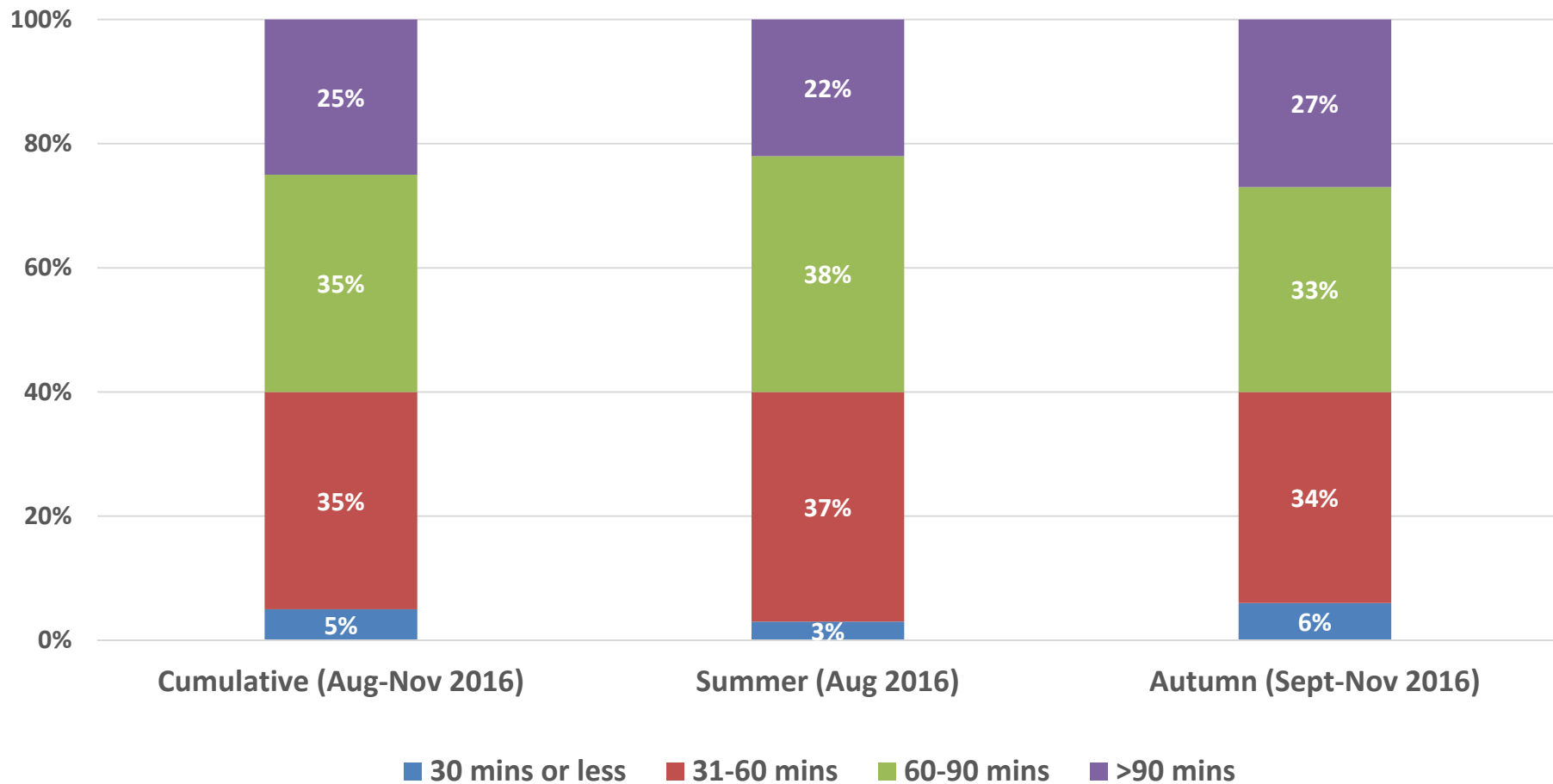
15% of all staying visitors (9% and 12% of summer and autumn respondents respectively) were travelling around Cornwall away from the local area where their accommodation was based during their stay.

How travelling around Cornwall - staying visitors travelling around during visit



86% of all staying visitors who were travelling around Cornwall away from the local area where their accommodation was based were doing so using their own car/van including 85% and 86% of summer and autumn respondents respectively

Longest journey length considered travelling to get to a place of interest in Cornwall - staying visitors travelling around during visit



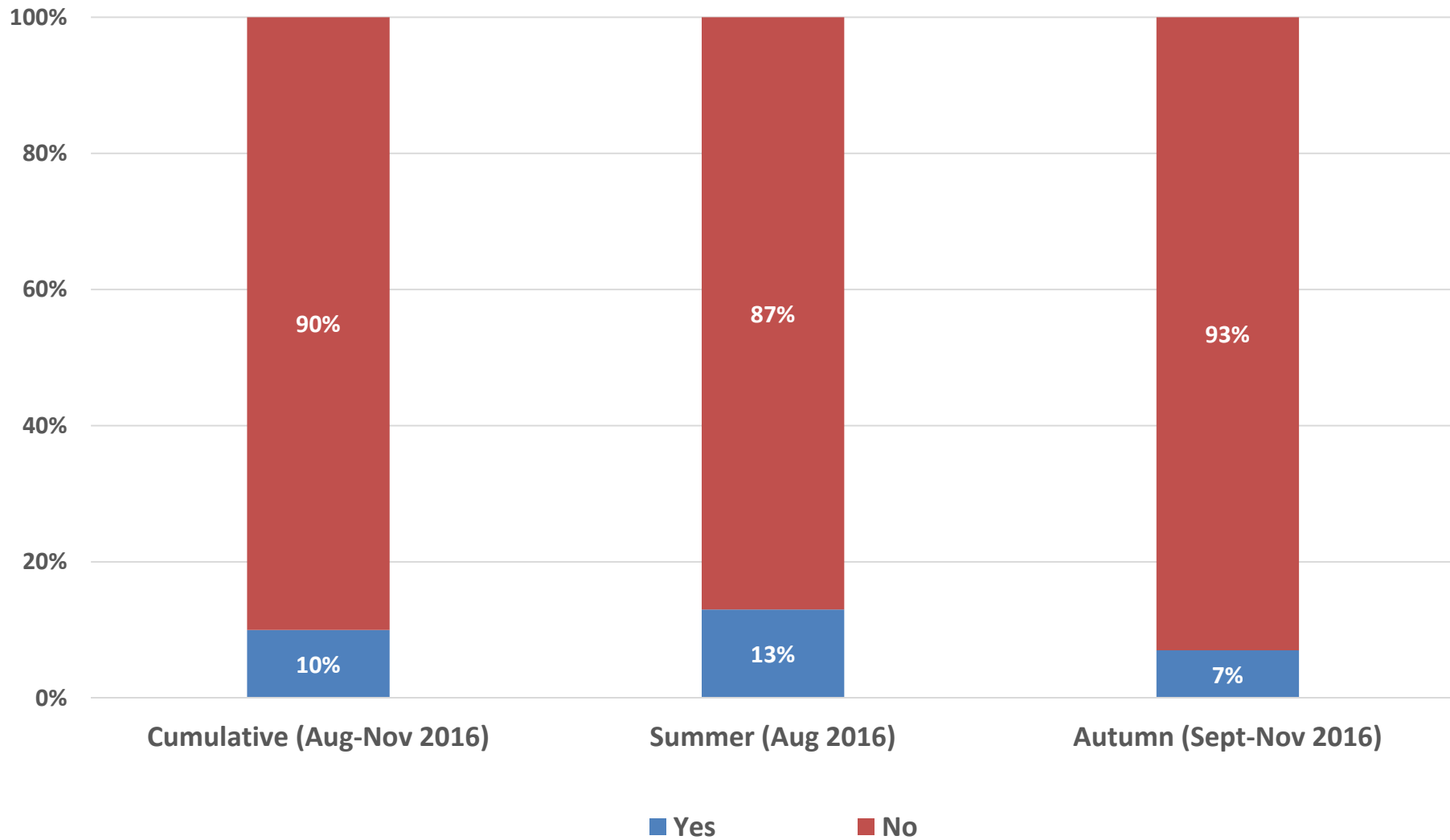
35% of all staying visitors who were travelling around Cornwall away from the local area where their accommodation was based during their stay would consider travelling 31-60 minutes to get to a place of interest in the county including 37% and 34% of summer and autumn respondents respectively. The same proportion would consider travelling 60-90 minutes to get to a place of interest in the county (38% and 33% of summer and autumn respondents respectively).

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Characteristics of Visits

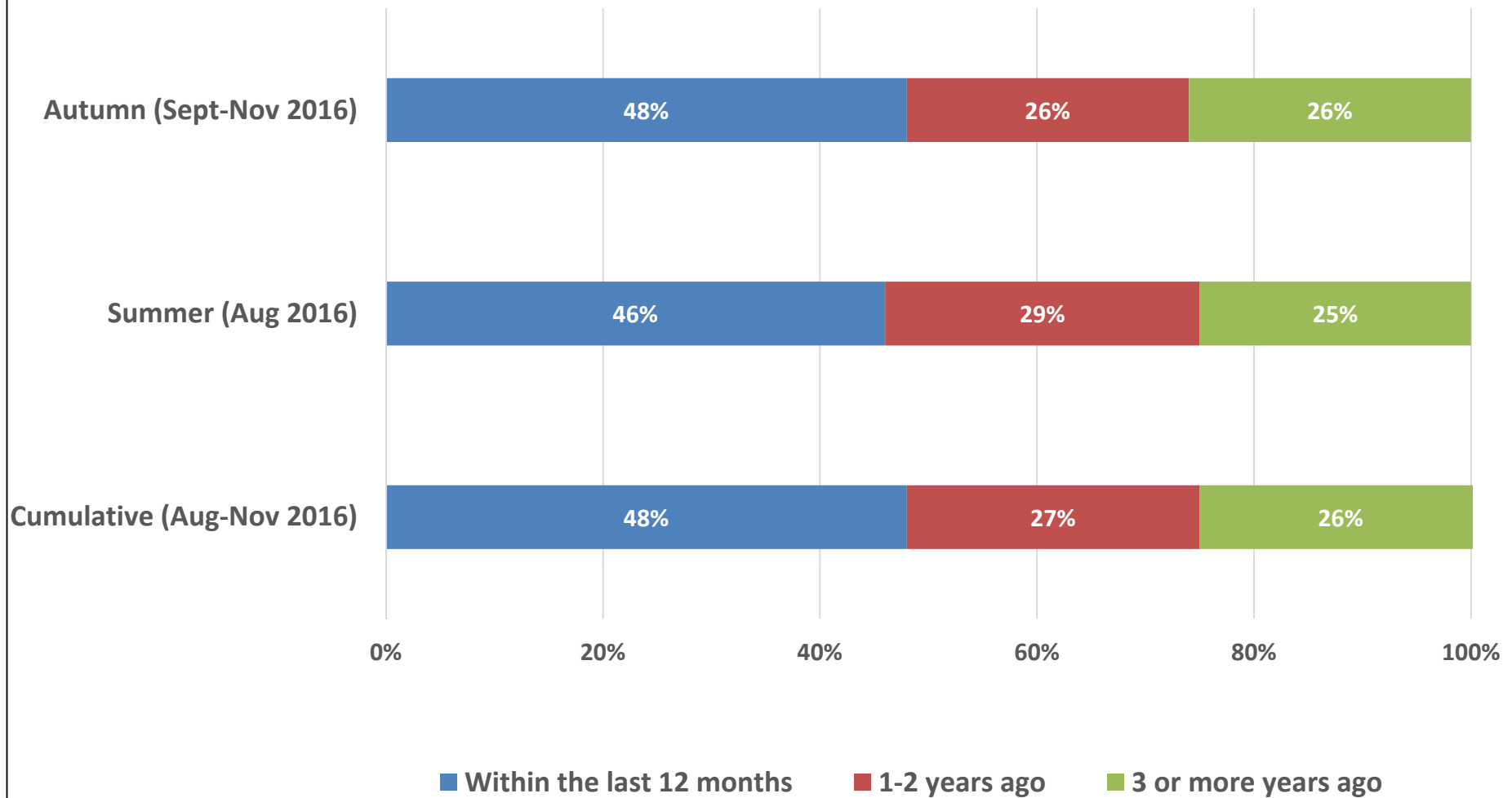


Whether first ever visit to Cornwall



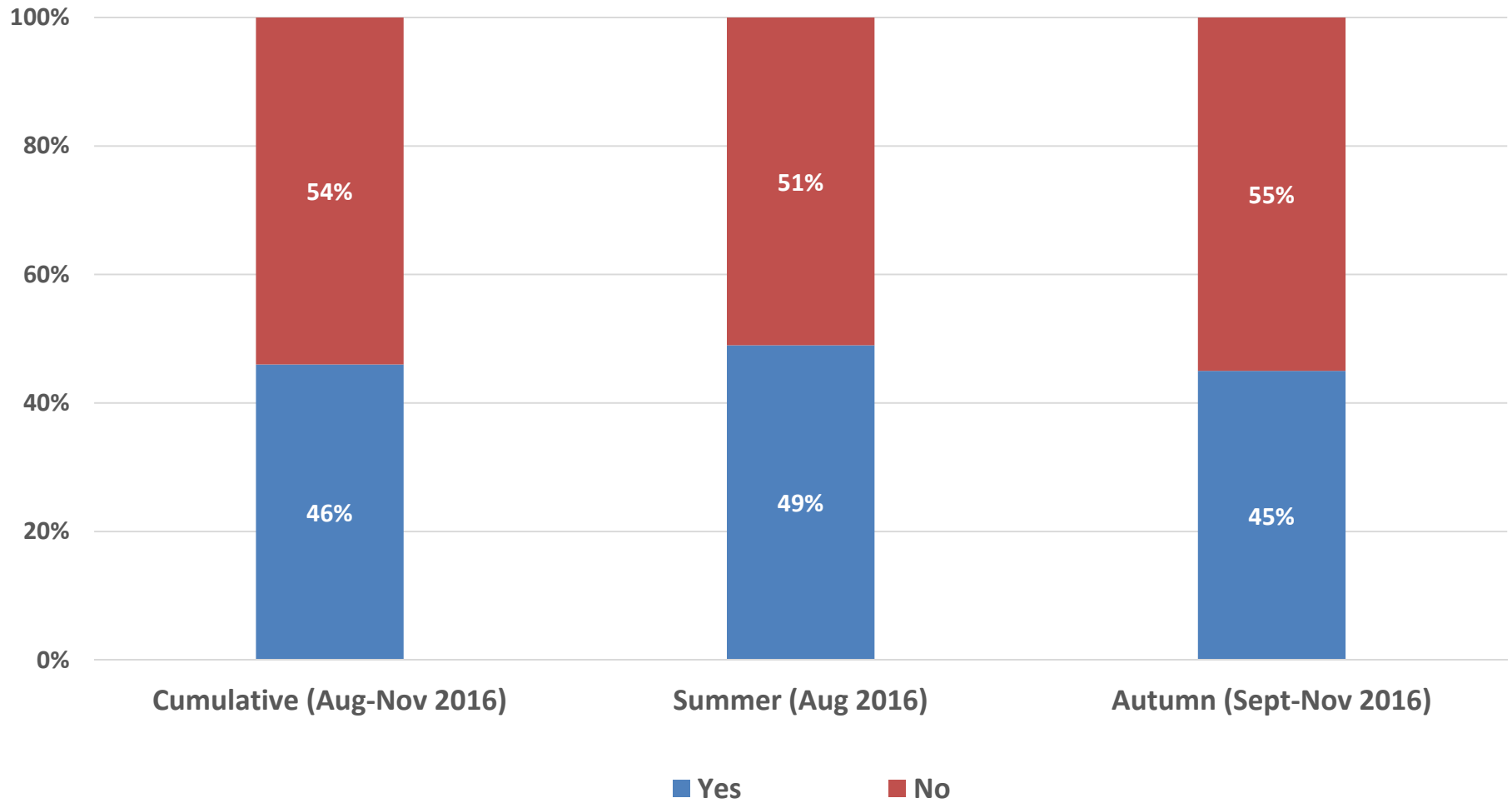
Nine out of ten respondents had visited Cornwall before including 87% and 89% of summer and autumn respondents respectively.

When was last visit to Cornwall – repeat visitors



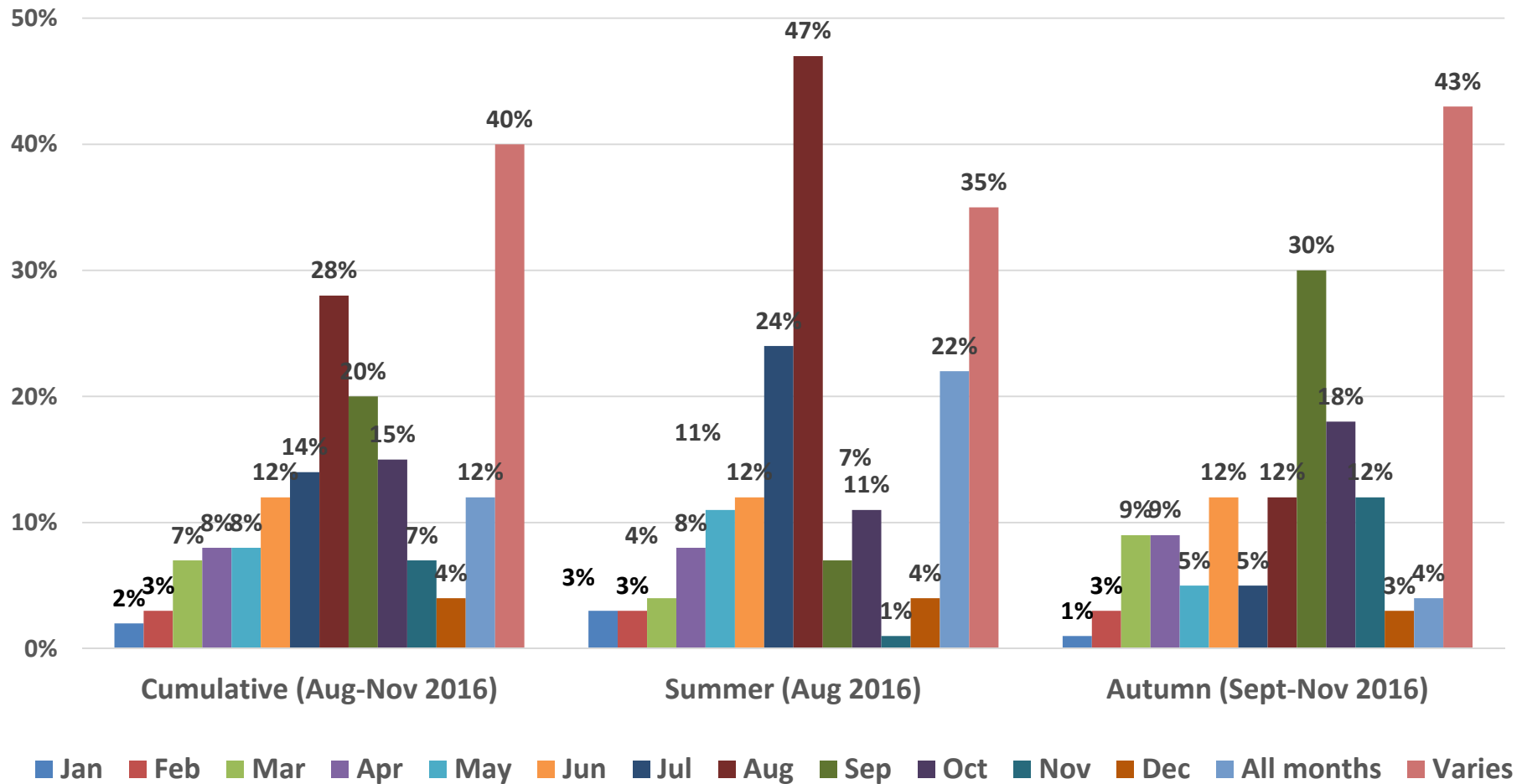
48% of all respondents who were on a repeat visit to Cornwall had previously visited the county in the last 12 months including 46% of summer respondents and 48% of autumn respondents.

Whether tend to visit Cornwall during the same time each year – repeat visitors



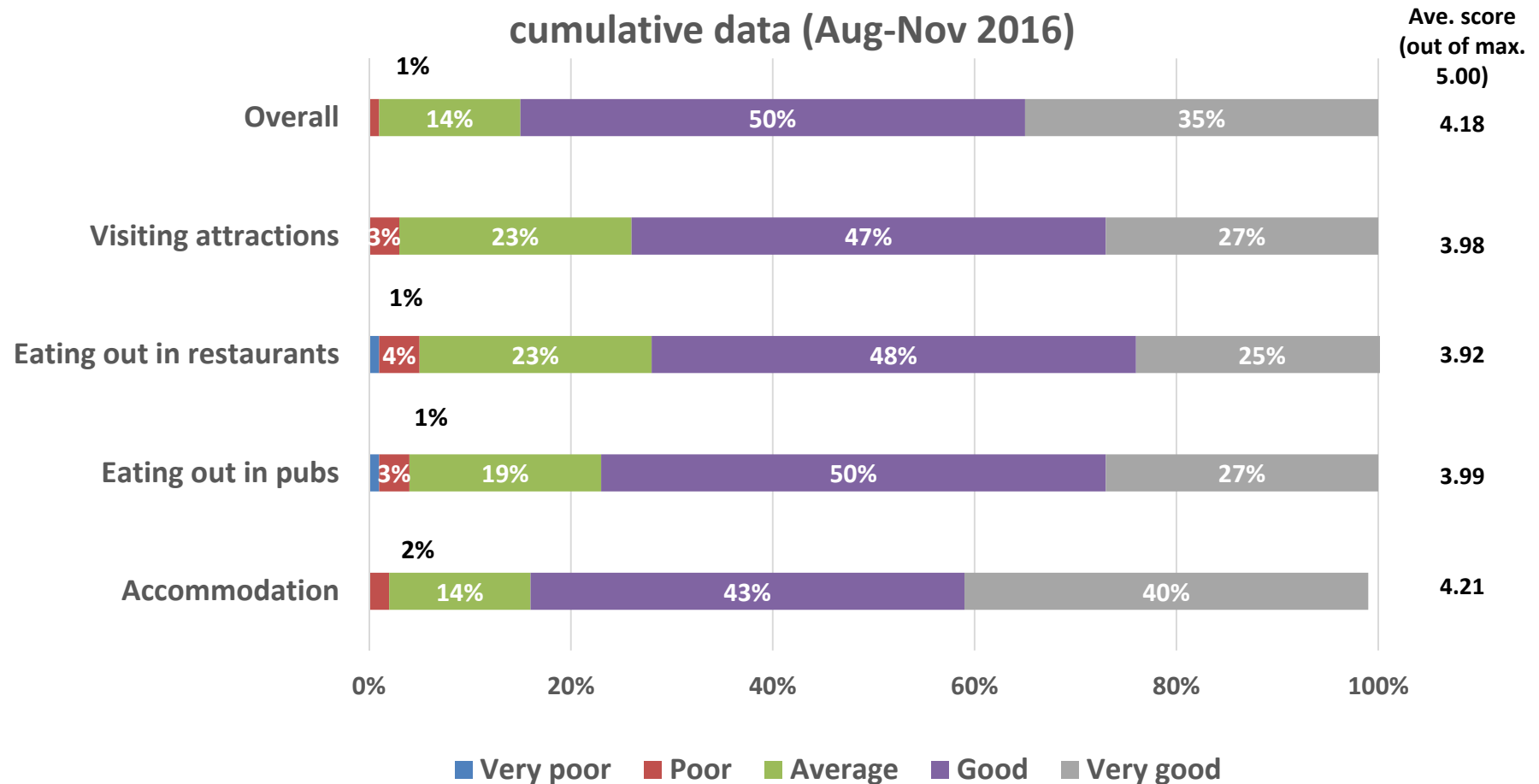
46% of all respondents said that they usually visit Cornwall during the same time each year including 49% and 47% of summer and autumn respondents respectively.

Months of the year when usually visit Cornwall – repeat visitors



The highest proportion of respondents (40%) said the months of the year when they usually visit Cornwall varies including 35% of summer respondents and 43% of autumn respondents. 28% said that they usually visit Cornwall during August each year including 47% of summer respondents and 12% of autumn respondents, 30% of whom usually visit during September.

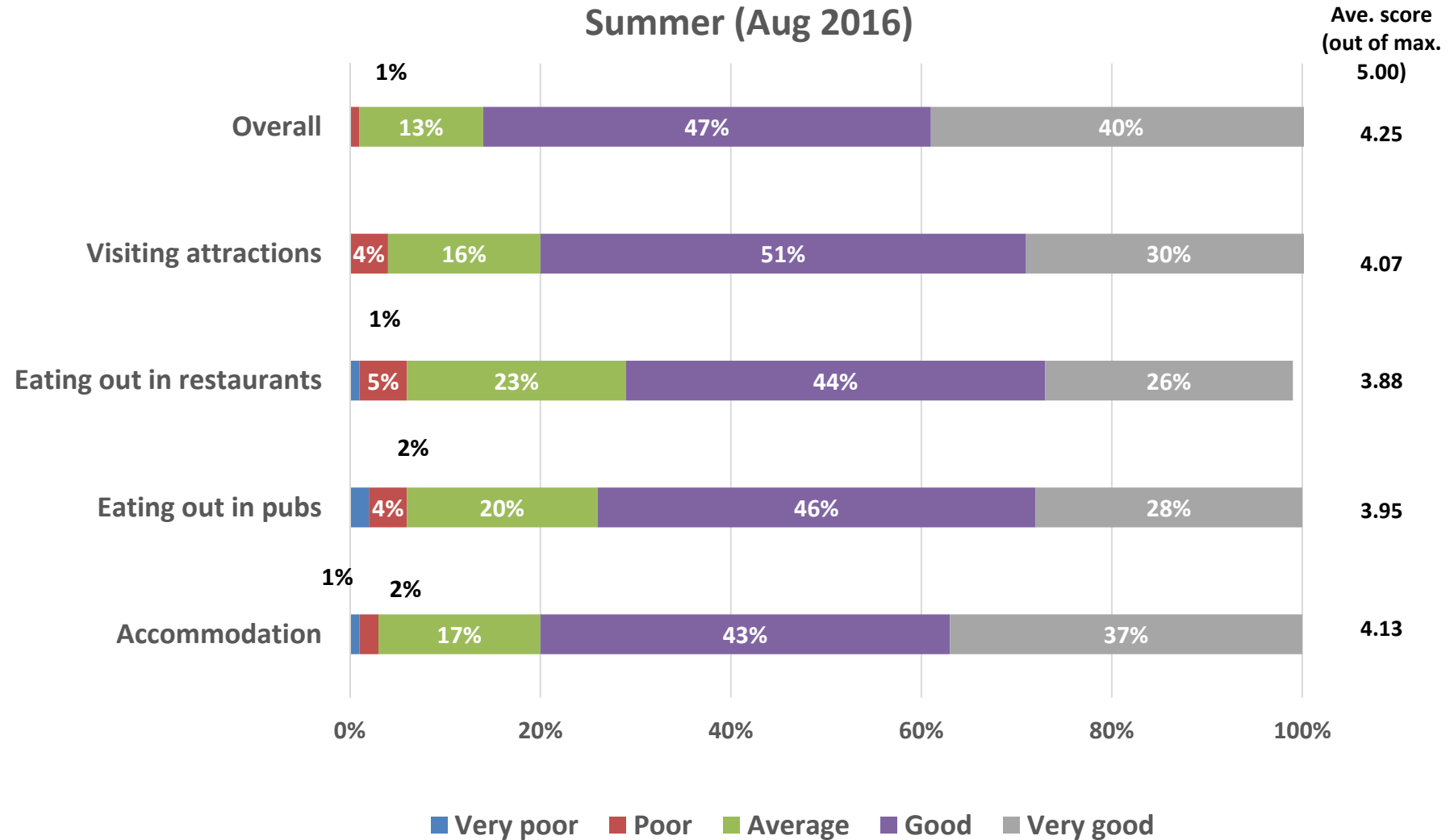
Value for money of Cornwall compared to other UK destinations – cumulative data (Aug-Nov 2016)



Respondents were asked to think about how they rated the value for money of various aspects of their visit to Cornwall and how these compared to other UK destinations in general.

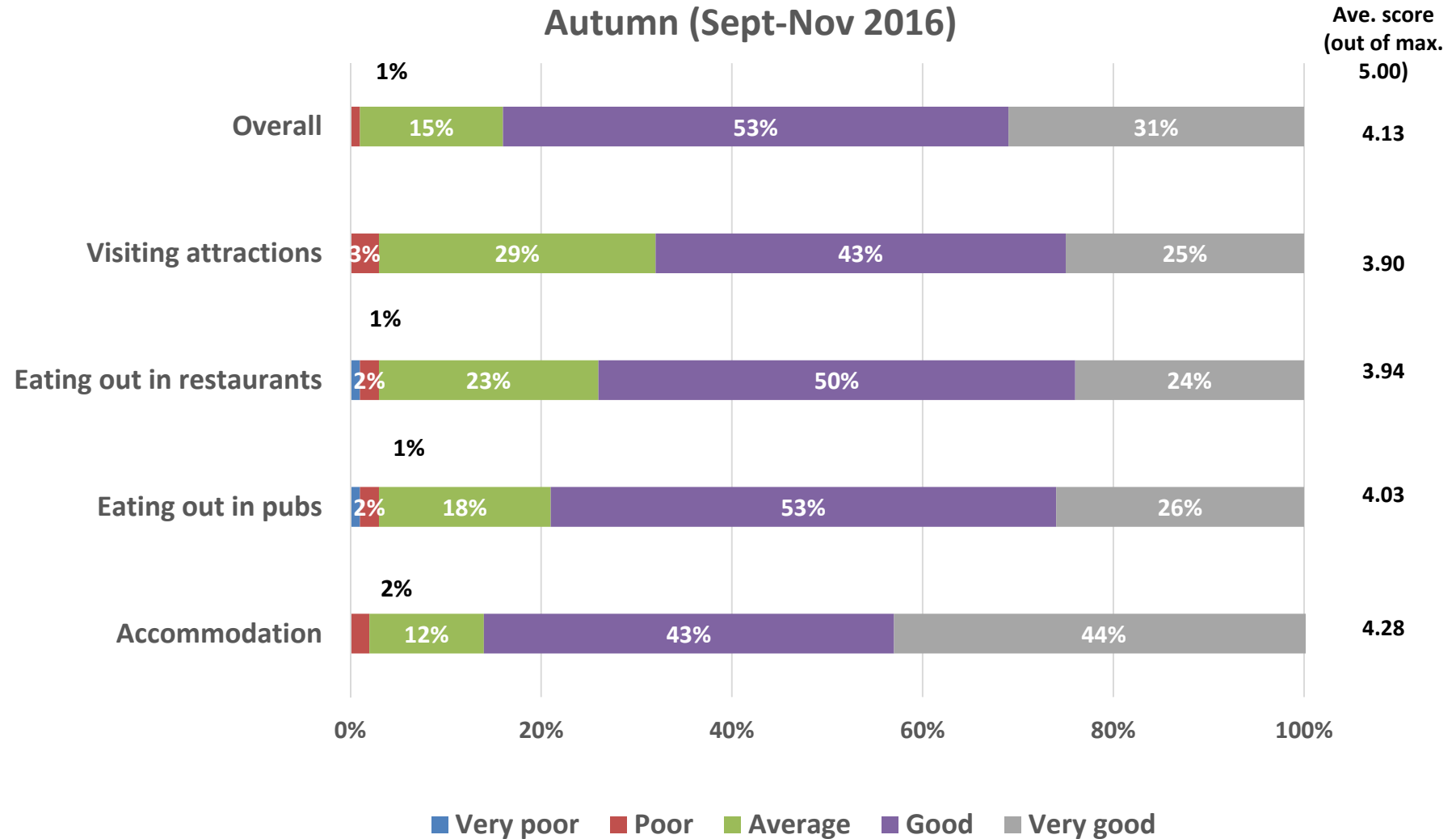
Respondents rated the value for money of accommodation in Cornwall the highest compared with other UK destinations (4.21) and the value for money of eating out in restaurants the lowest (3.92).

Value for money of Cornwall compared to other UK destinations – Summer (Aug 2016)



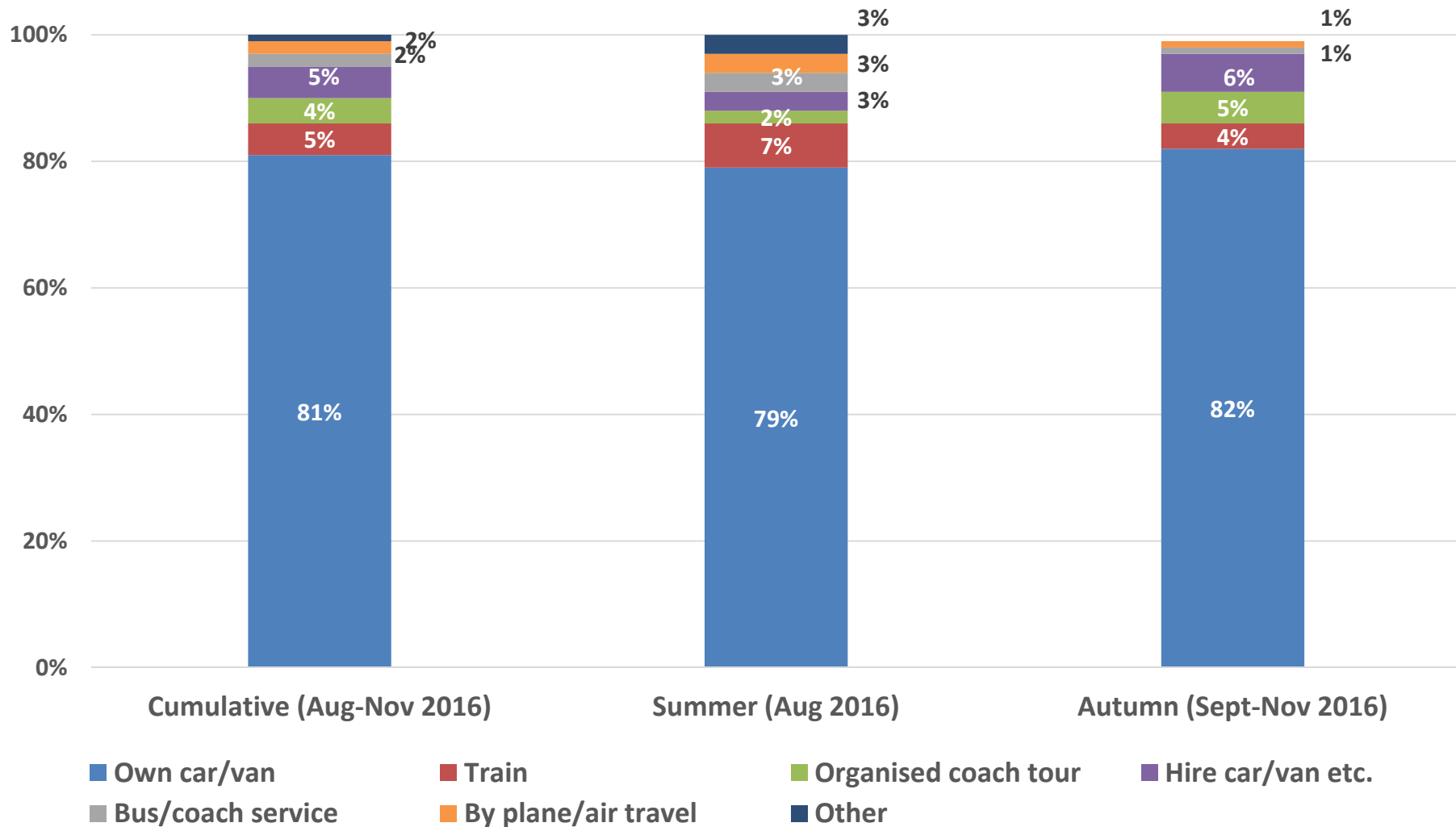
Summer respondents rated the value for money of accommodation in Cornwall the highest compared with other UK destinations (4.25) and the value for money of eating out in restaurants the lowest (3.88).

Value for money of Cornwall compared to other UK destinations – Autumn (Sept-Nov 2016)



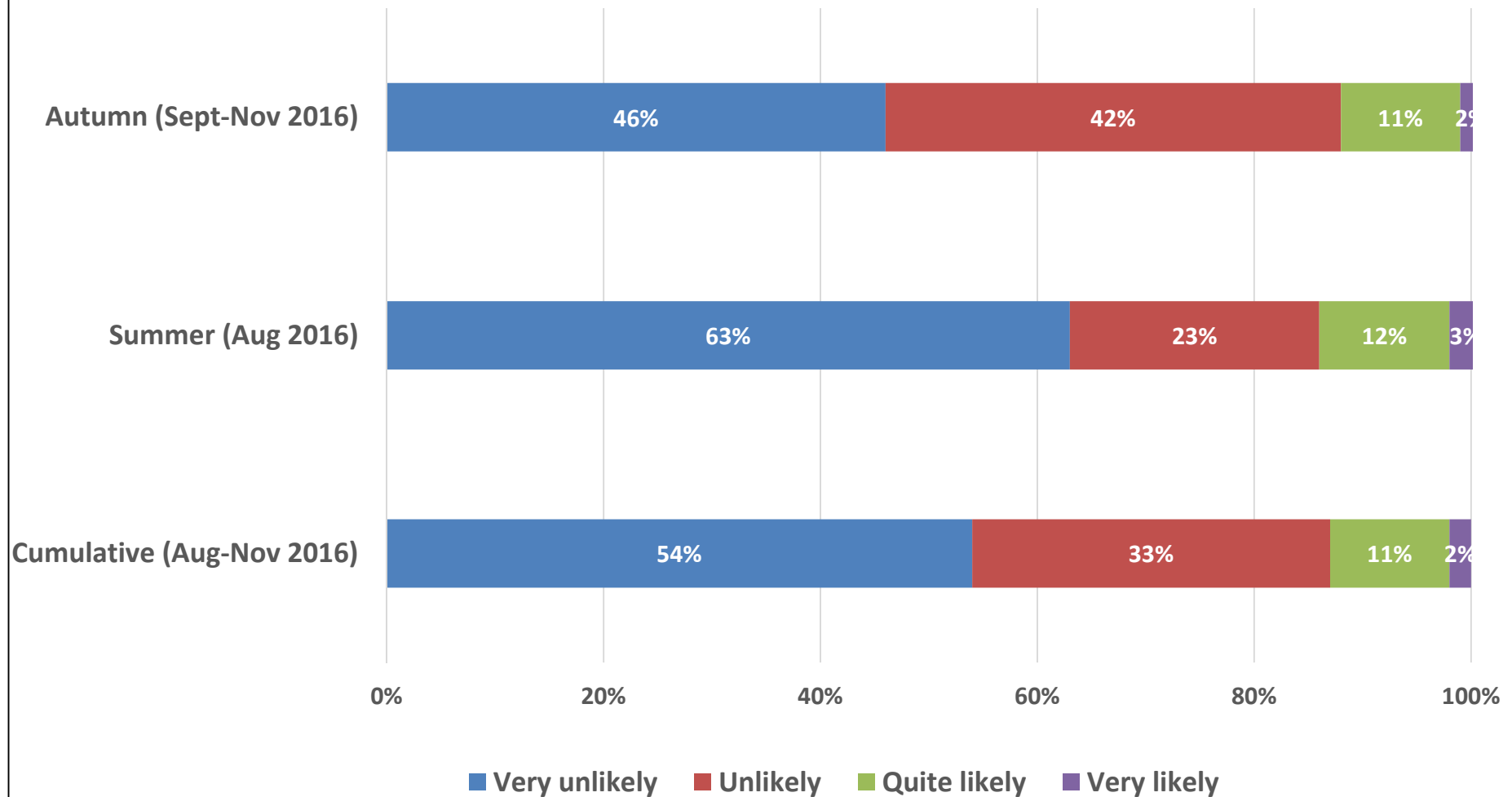
Autumn respondents also rated the value for money of accommodation in Cornwall the highest compared with other UK destinations (4.28) but rated the value for money of attractions the lowest (3.90).

Main form of transport used for longest part of journey to Cornwall



81% of all respondents had used their own car/van for the longest part of their journey to Cornwall including 79% and 82% of summer and autumn respondents respectively.

Likelihood of considering travelling to Cornwall by train for next visit – those not arriving by train for current visit



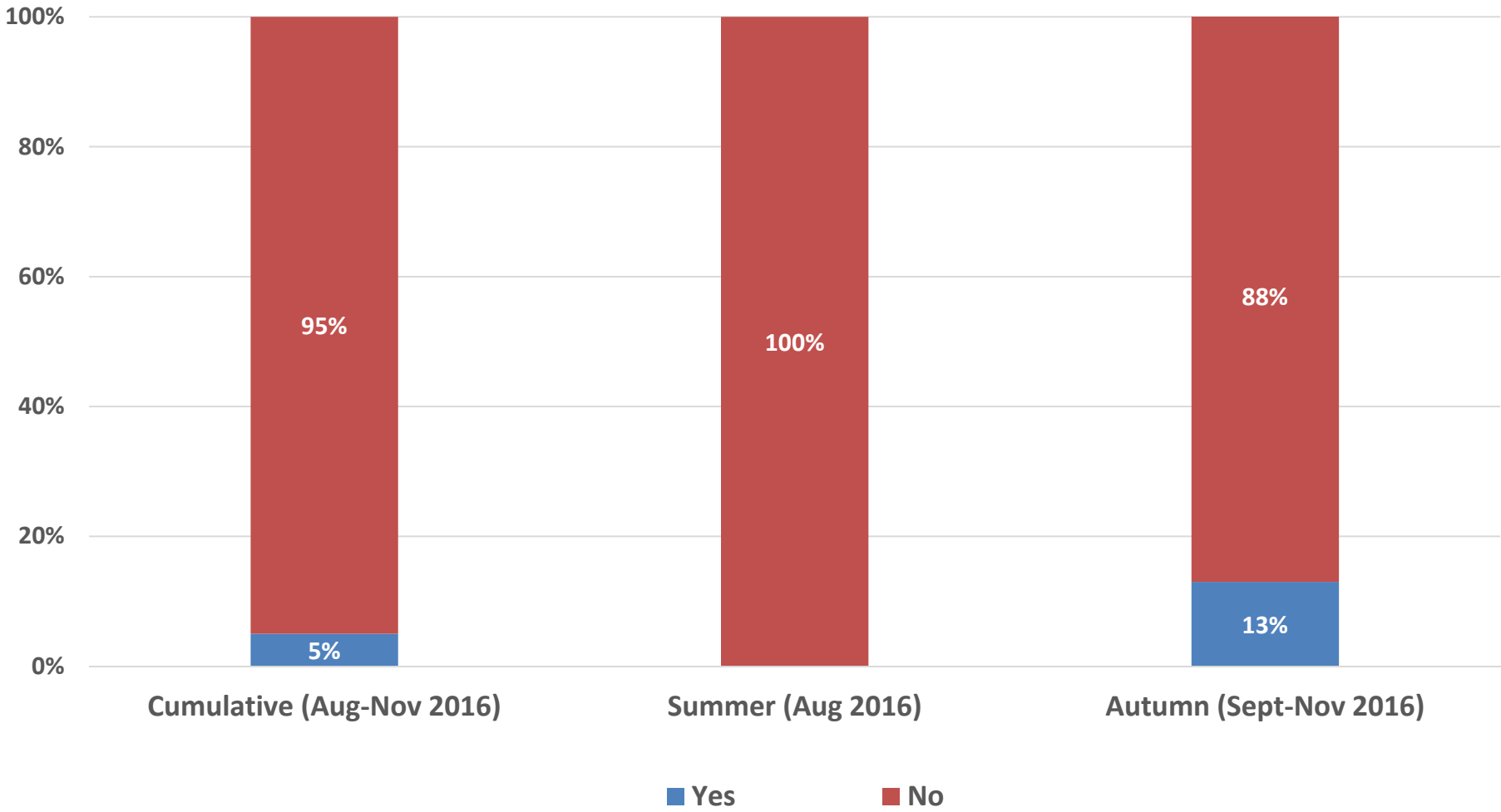
54% of all respondents who had not travelled by train for their current visit to Cornwall said they would be very unlikely to consider doing so if they were coming to Cornwall again in the future including 63% and 56% of summer and autumn respondents respectively.

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Train Travelers

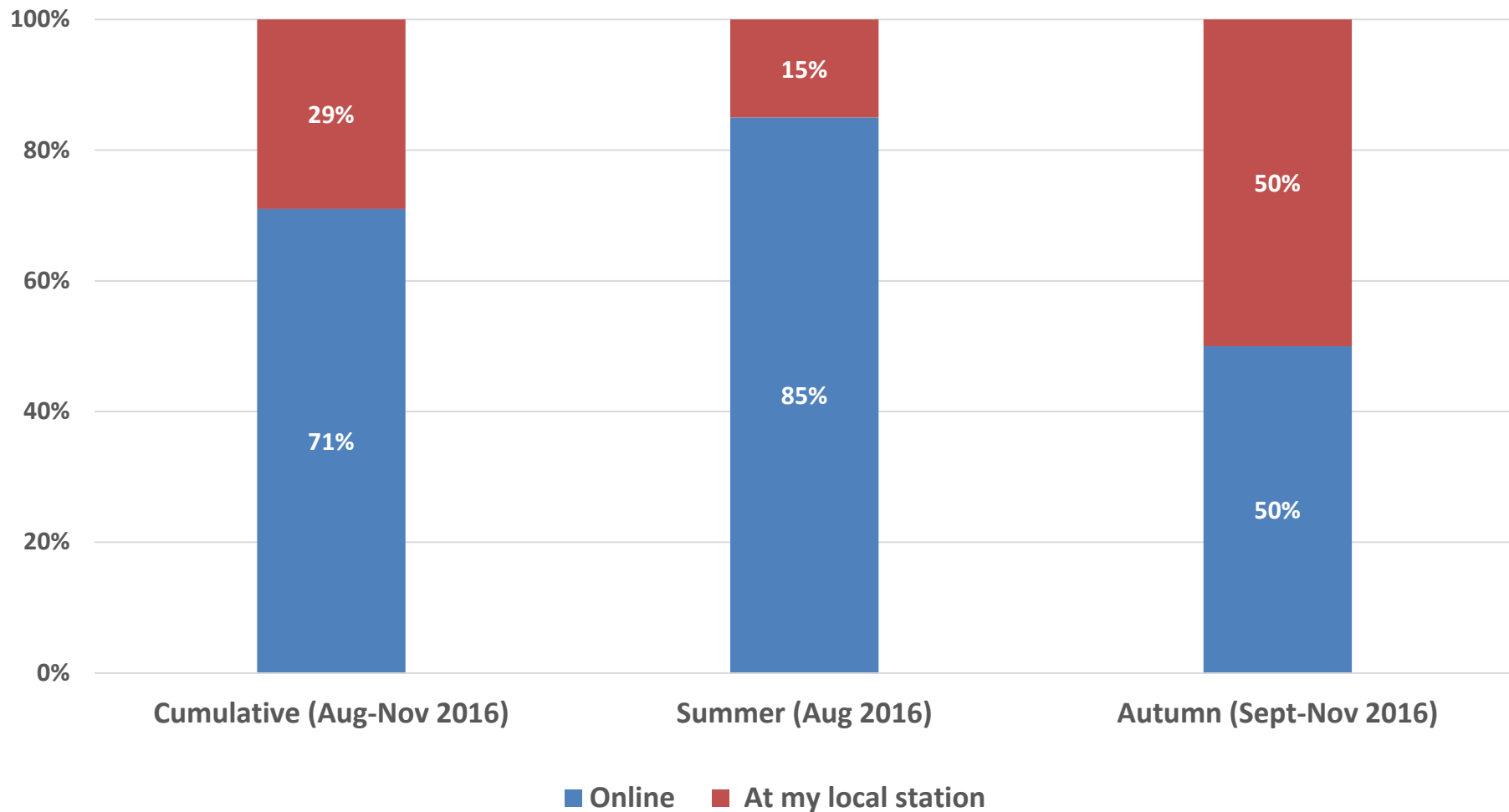


Whether used the GWR Night Riviera Sleeper service



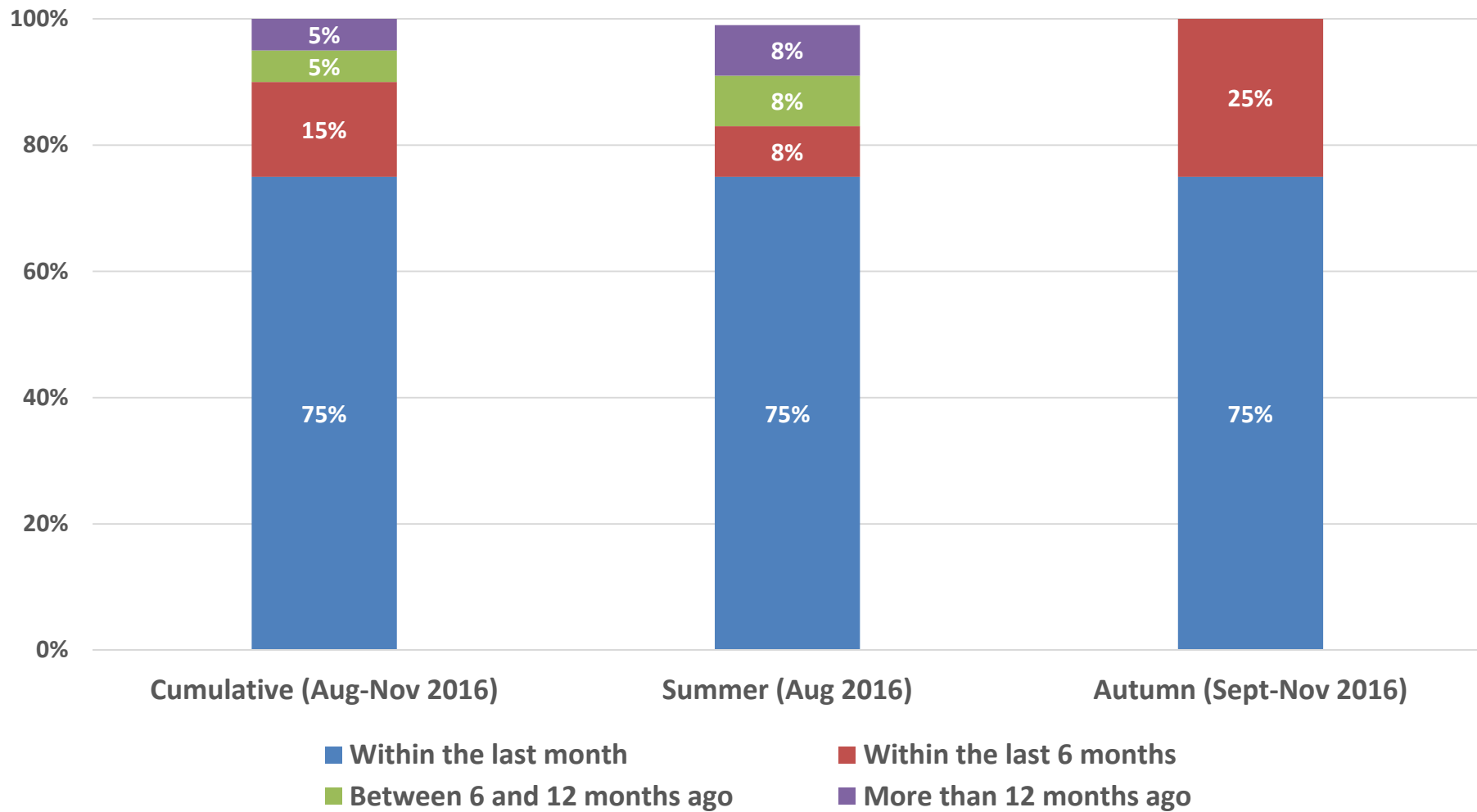
Just 5% of all respondents who had travelled to Cornwall by train had used the GWR Night Riviera Sleeper service including 13% of autumn respondents and no respondents during the summer period.

Where purchased rail ticket(s) for visit to Cornwall



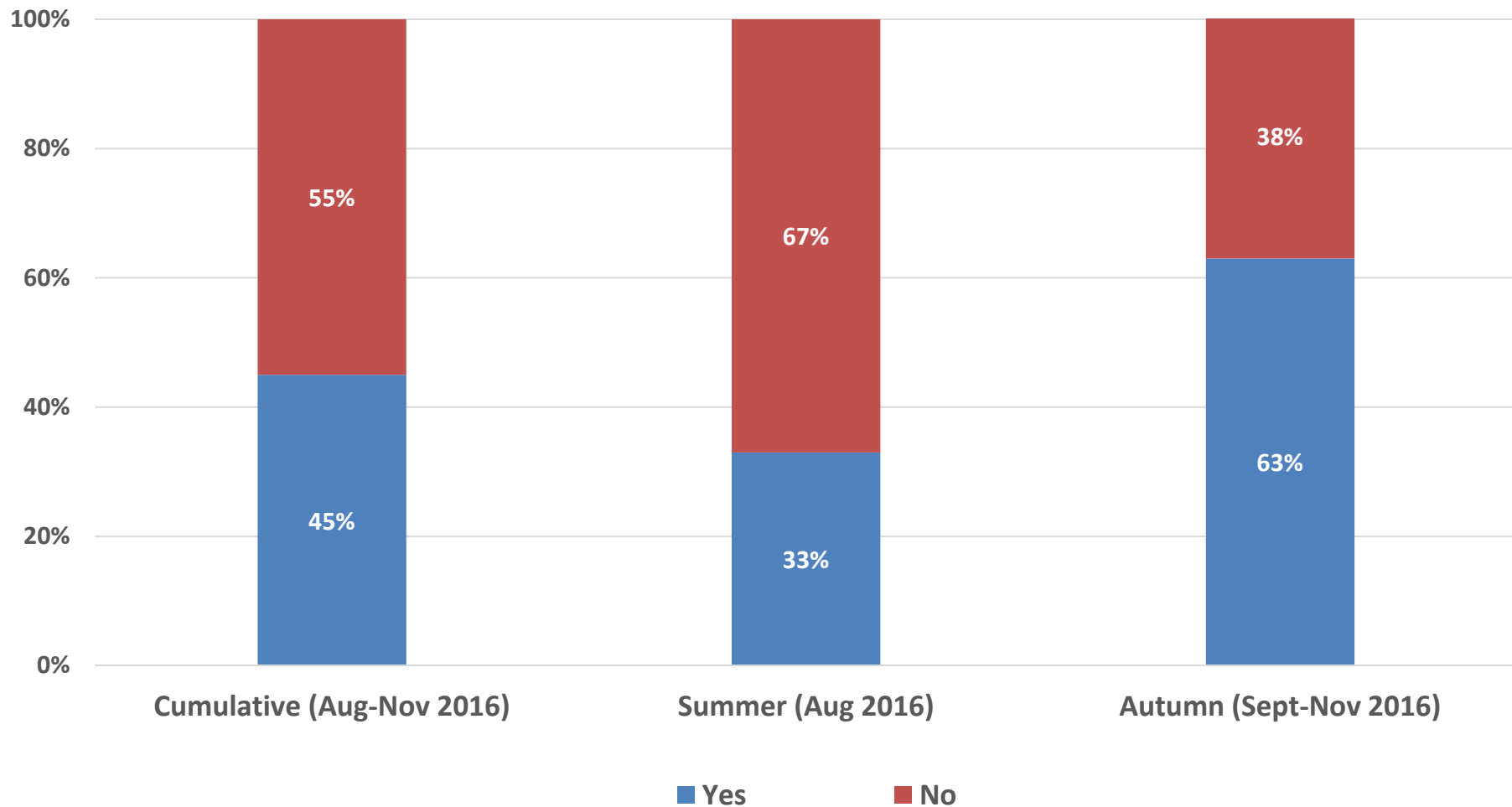
71% of all respondents who had used the train to get to Cornwall had purchased their rail ticket(s) online including 85% of summer respondents and 50% of autumn respondents.

How far in advance booked/planned travel arrangements for visit to Cornwall



75% of all respondents who had used the train to get to Cornwall booked/planned their travel arrangements within a month of their visit – this proportion was consistent across the interviewing periods.

Awareness of the Pullman restaurant available on GWR trains



45% of all respondents who had travelled to Cornwall by train were aware of the Pullman restaurant available on GWR trains including 33% and 45% of summer and autumn respondents respectively.

Likelihood to Recommend Travelling to Cornwall by Train – Recommendation Score

Recommendation scores are a simple but effective new method for measuring customer loyalty invented by Bain consultant Fred Reicheld who discovered that a single question provides the ultimate measure of just how loyal customers are and that this method could then be used to accurately predict future revenue growth.

Recommendation scores are calculated by asking a sample of customers a single question “How likely is it that you would recommend xyz to a friend or colleague?”. The respondent is asked to rate on an 11 point scale from ‘0’ (not at all likely) to ‘10’ (extremely likely) depending on how positive they feel about the product/event/location. The proportion of those who think it unlikely they would recommend it (Detractors) subtracted from the proportion that are likely to recommend it (Promoters) produces a single number known as a Recommendation Score.

Based on their response to this question visitors are then divided into three distinct groups:

0-6 score are Detractors *These are customers that have generated sales but are actually bad for the company over the long haul. They are less likely to buy anything/visit the event/location again and more likely to spread bad word of mouth and more costly to serve because of their dissatisfaction.*

7-8 are Passives *These customers are generally more positive about the product/event/location but are significantly less valuable than Promoters. Many companies over estimate their success by assuming relatively high customer satisfaction will lead to future growth. In reality Passives may be satisfied but that may not be enough in the longer term.*

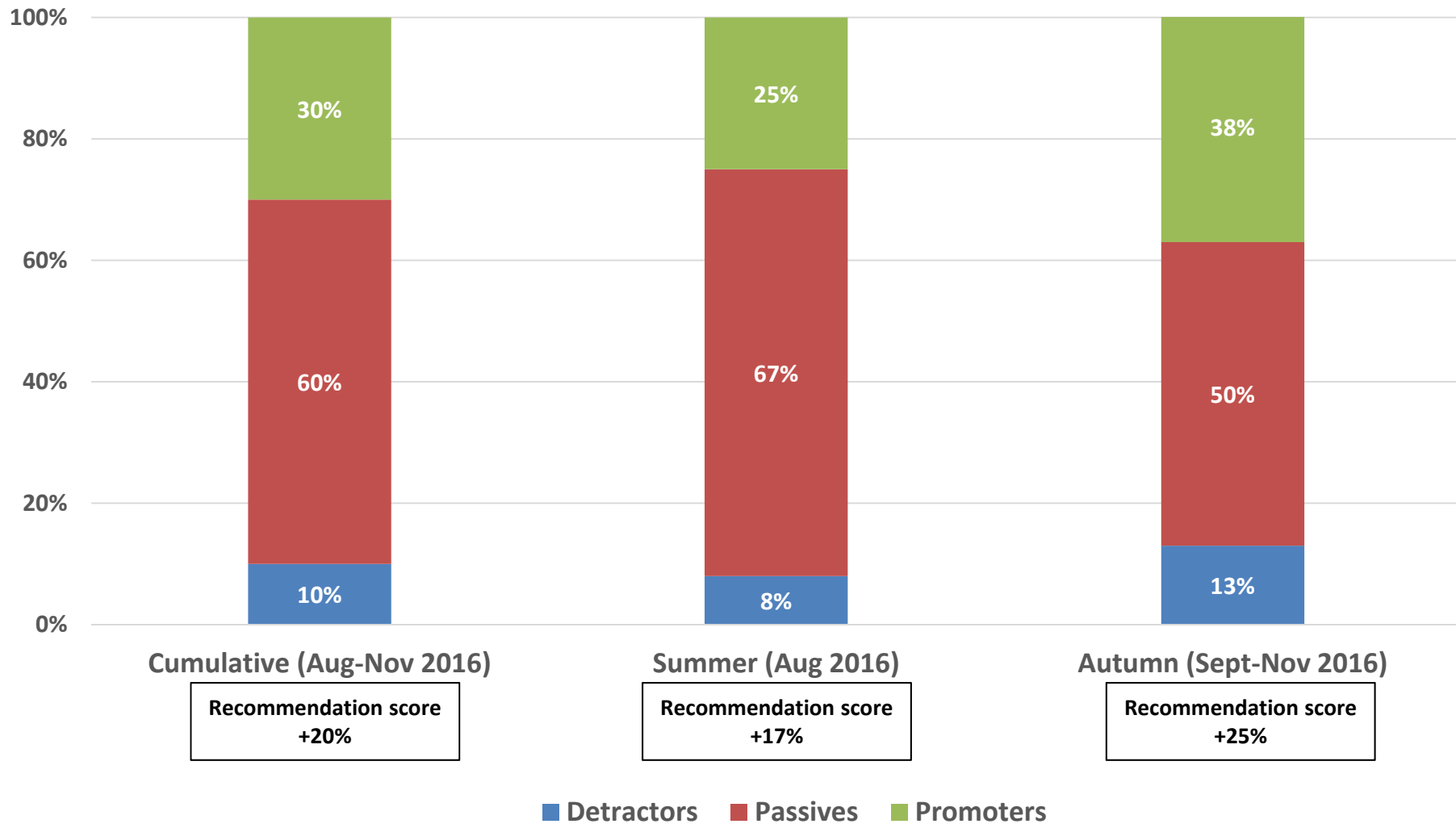
9-10 are Promoters *These customers drive business growth. The company/product/event/location has gone beyond satisfying their needs and truly delights them. As a result they will buy more from this company or visit an event or location again in the future, will recommend it to many others and therefore the company/product/event/location will not need to undertake costly ad campaigns or sales promotions to retain their business.*

The Recommendation Score is created by calculating what percentage of the customer base are Promoters and then subtracting the percentage who are Detractors.

$$\% \text{ Promoters} - \% \text{ Detractors} = \text{RECOMMENDATION SCORE}$$

The higher or more positive the Recommendation Score the more satisfied the customer base.

Recommendation score for travelling to Cornwall by train



Respondents who had travelled to Cornwall by train gave it a recommendation score of +20% for their likelihood of recommending it to their friends/family. Summer respondents gave rail travel a recommendation score of +20% and autumn respondents +25%.

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Information Sourcing



Where Obtained Information Prior to Visiting Cornwall	CUMULATIVE (AUG-NOV 2016)	SUMMER (AUG 2016)	AUTUMN (SEPT-NOV 2016)
From a previous visit/been before	60%	59%	62%
On the internet (incl. social media/apps)	44%	45%	42%
Via friends/ family	13%	16%	11%
I did not source any info prior to visit	8%	5%	11%
Via a recommendation	4%	7%	2%
Other	3%	3%	2%
Brochure/leaflet/guide	3%	4%	1%
Newspaper/magazine	1%	2%	-
Travel Agent	1%	1%	-
Tourist Information Centre (TIC)	1%-	-	1%

60% of all respondents obtained their information about visiting Cornwall from a previous visit including 59% of summer respondents and 62% of autumn respondents. 44% obtained their information about visiting Cornwall prior to their visit over the internet including 45% and 42% of summer and autumn respondents respectively

Internet Sites Used When Searching for Information About Visiting Cornwall –Visitors Using the Internet	CUMULATIVE (AUG-NOV 2016)	SUMMER (AUG 2016)	AUTUMN (SEPT-NOV 2016)
Search engines e.g. Google	74%	80%	68%
Accommodation providers' website	32%	23%	41%
www.visitcornwall.com	24%	26%	22%
Review sites e.g. Trip Advisor	14%	21%	7%
Other website	9%	10%	8%
Attraction providers' website	3%	5%	2%
Online Travel Agents (OTA's) e.g. Expedia.co.uk/LateRooms.com	3%	2%	5%
www.visitengland.com	2%	-	3%
Social media websites e.g. Facebook/Twitter/Instagram/	2%	1%	2%
Newspaper/ magazine websites e.g. Daily Mail /Sunday Times	1%	2%	-
Travel magazine websites e.g. Lonely Planet	1%	1%	-
I did not use the internet prior to visit	1%	-	1%
Rail company website	-	-	-

74% of all internet users had used a search engine such as Google to obtain their information about visiting Cornwall over the internet including 80% of summer respondents and 68% of autumn respondents.

Use of the Internet – Visitors Using the Internet	CUMULATIVE (AUG-NOV 2016)	SUMMER (AUG 2016)	AUTUMN (SEPT-NOV 2016)
Information sourcing ONLY	27%	38%	17%
Information sourcing AND to book accommodation/car hire/flights/attraction tickets/event tickets etc.	73%	62%	83%

73% of all internet users had used it to source information and to book their accommodation/car hire etc. including 62% and 83% of summer and autumn respondents respectively.

Internet Sites Used to Book Accommodation/car hire/rail tickets/flights/attraction tickets/event tickets etc. - Visitors Using the Internet	CUMULATIVE (AUG-NOV 2016)	SUMMER (AUG 2016)	AUTUMN (SEPT-NOV 2016)
Accommodation providers' website	67%	60%	72%
Other website	19%	19%	19%
Attraction providers' website	8%	11%	6%
Online Travel Agent (OTA) e.g. Expedia.co.uk/LateRooms.com/	7%	4%	8%
Review sites e.g. TripAdvisor	6%	9%	4%
I did not use the internet to make a booking	4%	6%	3%

67% of all internet users who had used it to book their accommodation, car hire etc. had used their accommodation providers' website to do so including 60% and 72% of summer and autumn respondents respectively.

Where Obtained Information During Visit To Cornwall	CUMULATIVE (AUG-NOV 2016)	SUMMER (AUG 2016)	AUTUMN (SEPT-NOV 2016)
I have not sourced any local information during my visit	29%	19%	38%
Brochure/leaflet/guide	29%	36%	22%
From a previous visit/been before	29%	30%	27%
On the internet (incl. social media/apps)	23%	33%	13%
Via friends/family	9%	13%	5%
Accommodation reception	7%	7%	6%
Tourist Information Centre (TIC)	5%	9%	1%
Other	3%	3%	3%
Via a recommendation	3%	4%	1%
Newspaper/magazine	-	1%	-

29% of all respondents had not sourced any local information during their visit to Cornwall including 19% and 38% of summer and autumn respondents respectively. The same proportion had used a brochure/leaflet/guide to obtain information during their visit to Cornwall (including 36% of summer respondents and 22% of autumn respondents) and/or relied on information gathered during a previous visit to Cornwall (30% and 27% of summer and autumn respondents respectively). 23% used the internet to source local information during their visit including 33% and 13% of summer and autumn respondents respectively.

Internet Sites Used to Source Information Whilst Visiting Cornwall - Visitors Using the Internet	CUMULATIVE (AUG-NOV 2016)	SUMMER (AUG 2016)	AUTUMN (SEPT-NOV 2016)
Other website	27%	27%	28%
Attraction providers' website	26%	29%	20%
www.visitcornwall.com	25%	23%	28%
Review sites e.g. Trip Advisor	19%	21%	12%
Social media websites e.g. Facebook/Twitter/Instagram	19%	21%	12%
I have not used the internet during my visit	7%	5%	12%
Rail company website	5%	5%	4%

27% of internet users had used an other website to source information over the internet whilst visiting Cornwall including 27% and 28% of summer and autumn respondents respectively. 26% had used an attraction providers' website (29% and 20% of summer and autumn respondents respectively).

A quarter of internet users had used the www.visitcornwall.com website to source information during their visit to the county including 23% and 28% of summer and autumn respondents respectively.

	'Check in' on social media sites			Upload photos			Post online reviews		
	Yes, during visit	Yes, when return home	No	Yes, during visit	Yes, when return home	No	Yes, during visit	Yes, when return home	No
CUMULATIVE (AUG-NOV 2016)	29%	5%	66%	26%	9%	65%	12%	7%	81%
SUMMER (AUG 2016)	40%	4%	56%	36%	12%	52%	19%	11%	70%
AUTUMN (SEPT-NOV 2016)	18%	5%	76%	18%	5%	77%	6%	3%	91%

33% of all respondents 'checked in' on social media sites either during their visit or when they returned home including 44% of summer respondents and 23% of autumn respondents.

35% of all respondents uploaded photos either during a visit or when they returned home (48% and 23% of summer and autumn respondents respectively).

19% of all respondents (30% and 9% of summer and autumn respondents respectively) posted online reviews either during their visit or when they returned home.

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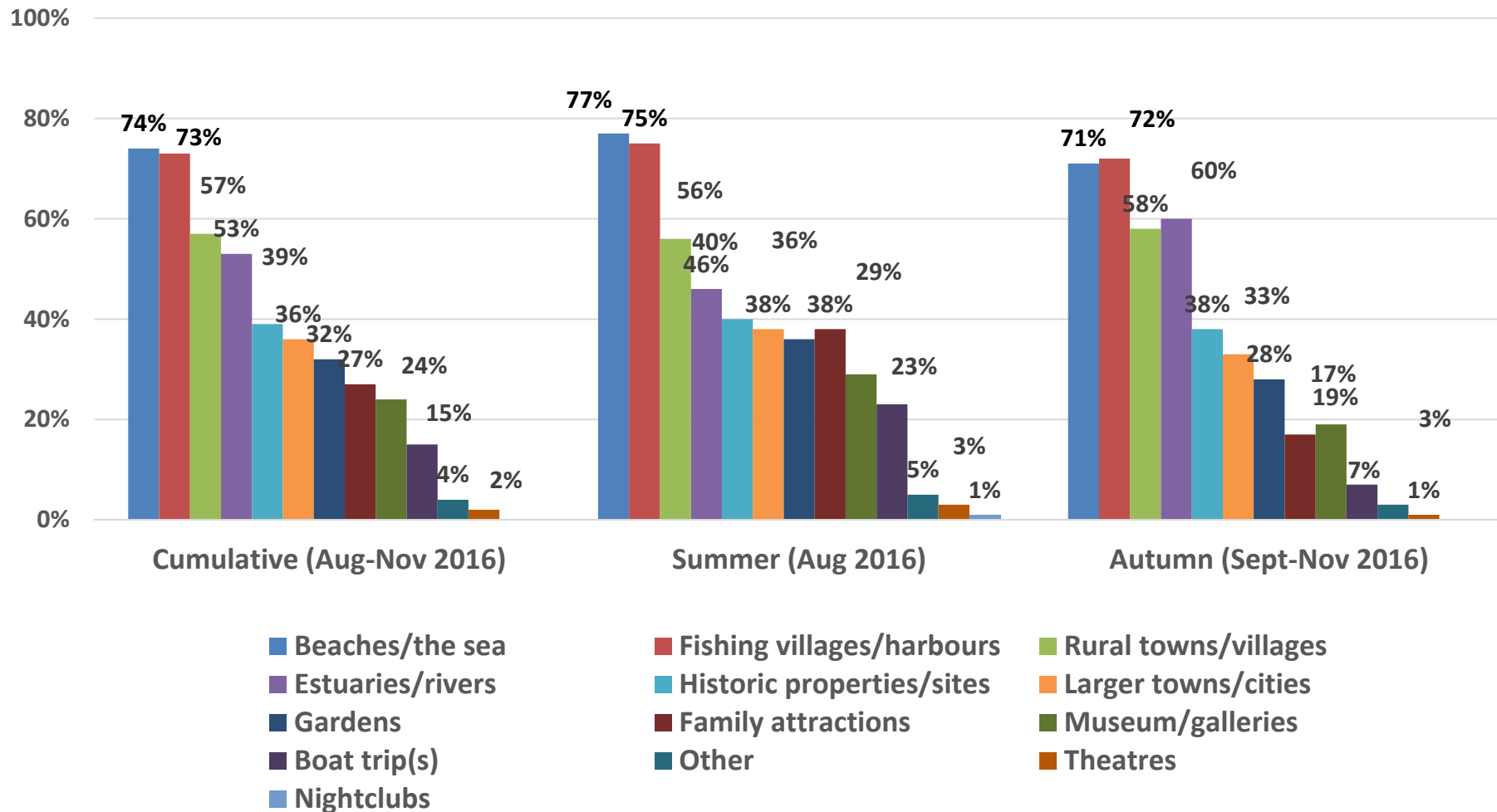
Activities/Attractions & Places of Interest Visited



Activity taking	CUMULATIVE (AUG-NOV 2016)	CUMULATIVE - % for whom the activity was the main reason for their visit	SUMMER (AUG 2016)	SUMMER - % for whom the activity was the main reason for their visit	AUTUMN (SEPT-NOV 2016)	AUTUMN - % for whom the activity was the main reason for their visit
Eating & drinking	87%	4%	87%	3%	87%	5%
Shopping	75%	2%	76%	1%	74%	3%
Short walk - up to 2 miles	71%	7%	74%	2%	68%	11%
Spending half day or more on beach	60%	7%	73%	8%	49%	7%
Long walk - more than 2 miles	52%	9%	50%	1%	54%	17%
Using the South West Coast Path	38%	6%	37%	1%	40%	10%
Swimming in the sea	36%	1%	49%	2%	25%	0%
Arts/cultural activities	20%	2%	16%	-	23%	4%
Other	10%	10%	14%	17%	7%	4%
Attending a festival and/or event	14%	1%	18%	1%	10%	2%
Swimming (pool)	14%	-	21%	-	8%	0%
Cycling	10%	1%	16%	1%	5%	1%
Visiting the cinema	9%	-	9%	1%	9%	0%
Other water sports - kayaking/windsurfing	8%	1%	12%	-	4%	2%
Fishing	6%	-	12%	-	1%	0%
Sailing/yachting/boating	6%	1%	9%	-	3%	2%
Golf	3%	-	4%	1%	2%	0%
Other outdoor sport/pursuit	3%	-	5%	-	1%	0%
Visit a spa/well being centre	2%	-	3%	-	1%	0%

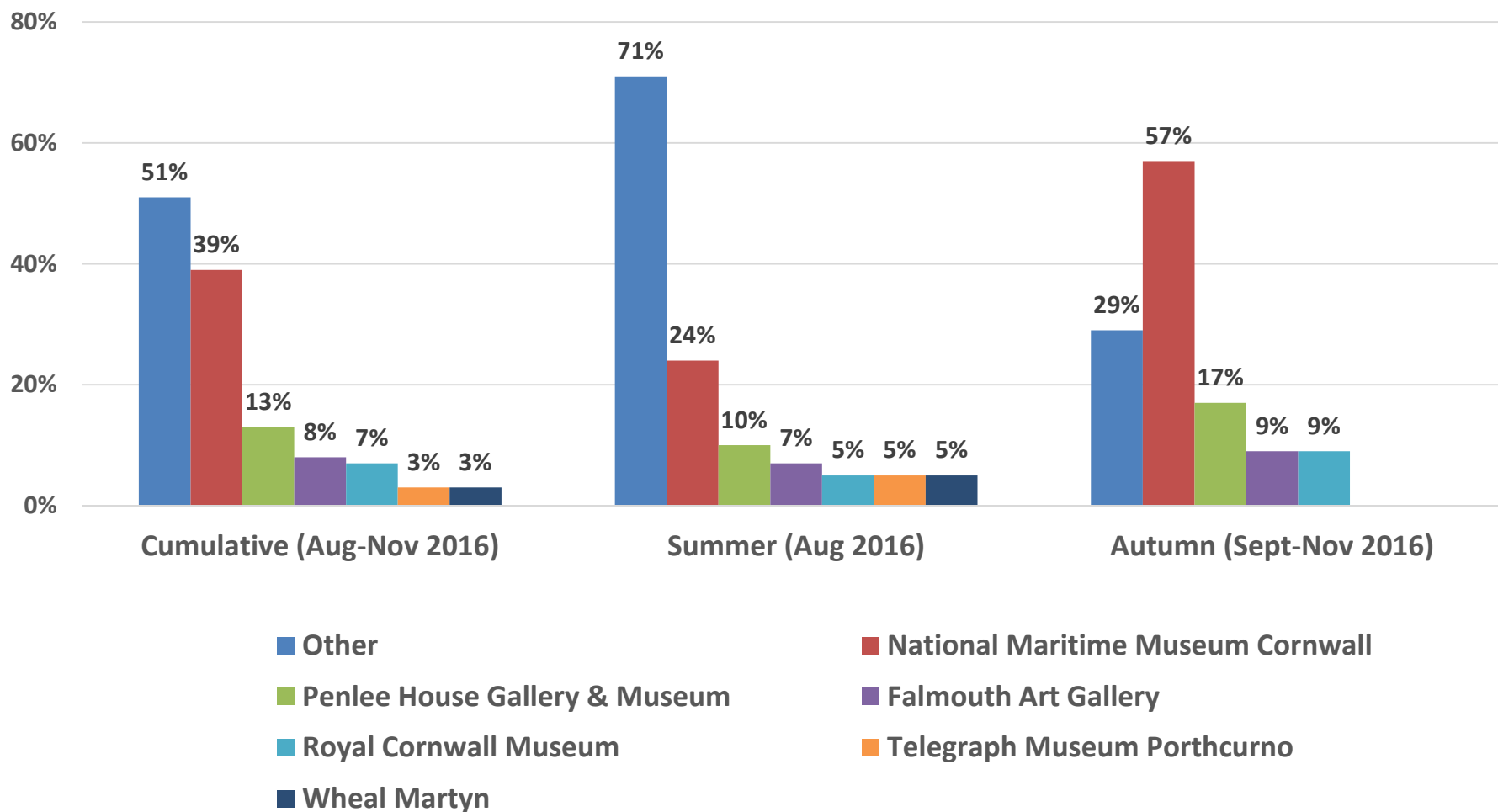
The most popular activities undertaken, regardless of the period of interviewing were: eating & drinking; shopping and going for a short walk of up to 2 miles.

Types of attractions or places of interest visited/planned to visit during trip to Cornwall



Beaches/the sea and fishing villages/harbours were the most popular types of attractions/places of interest visited regardless of the period of interview.

Museums/galleries visited/planned to visit during trip to Cornwall – those who had visited/planned to visit a museum/art gallery during their visit



Other museums and the National Maritime Museum Cornwall were the most popular museums/galleries visited regardless of the period of interview.

Cornwall Visitor Survey 2016

Visitors' Opinions of Cornwall



Introduction

The 2016 Cornwall Visitor Survey obtained visitors' satisfaction levels with a wide range of factors or indicators which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of '1' to '5' scale where '1' = 'very poor' (or the most negative response), '2' = 'poor', '3' = 'average', '4' = 'good' and '5' = 'very good' (or the most positive response), allowing a satisfaction 'score' (out of a maximum of five) to be calculated.

The areas explored in terms of satisfaction were:

- Accommodation
- Shopping
- Places to eat & drink
- Places to visit/attractions
- Theatres/galleries/museums
- Beaches
- Ease of finding way around
- Public transport
- Upkeep of parks & open spaces
- Enjoyment of using the South West Coast Path
- Cleanliness of streets
- Car parks
- Nightlife/evening entertainment
- Overall impression of Cornwall
- Overall enjoyment of visit

Visitor satisfaction scores

Satisfaction indicator – all visitors					
1	Accommodation - quality of service	4.60	18	Pedestrian signs	4.30
2	Accommodation - value for money	4.50	19	Display maps & information boards	4.31
3	Shopping - range	4.24	20	Public transport - quality of service	4.25
4	Shopping - quality of service	4.38	21	Public transport - value for money	4.38
5	Shopping - value for money	4.12	22	Upkeep of the parks & open spaces	4.64
6	Places to eat & drink - range	4.54	23	Enjoyment of using the South West Coast Path	4.79
7	Places to eat & drink - quality of service	4.56	24	Cleanliness of the streets	4.52
8	Places to eat & drink - value for money	4.22	25	Parking - ease of parking	3.73
9	Places to visit/attractions - range	4.63	26	Parking - quality of service	3.78
10	Places to visit/attractions - quality of service	4.61	27	Parking - value for money	3.35
11	Places to visit/attractions - value for money	4.35	28	Nightlife/evening entertainment - range	4.09
12	Theatre/galleries/museums - range	4.32	29	Nightlife/evening entertainment - quality of service	4.10
13	Theatre/galleries/museums - quality of service	4.44	30	Nightlife/evening entertainment - value for money	4.05
14	Theatre/galleries/museums - value for money	4.32	31	Overall impression of Cornwall in terms of general atmosphere	4.80
15	Quality of the beaches	4.82	32	Overall impression of Cornwall in terms of feeling of welcome	4.80
16	Cleanliness of the beaches	4.80	33	Overall enjoyment of your visit	4.83
17	Road signs	4.37			

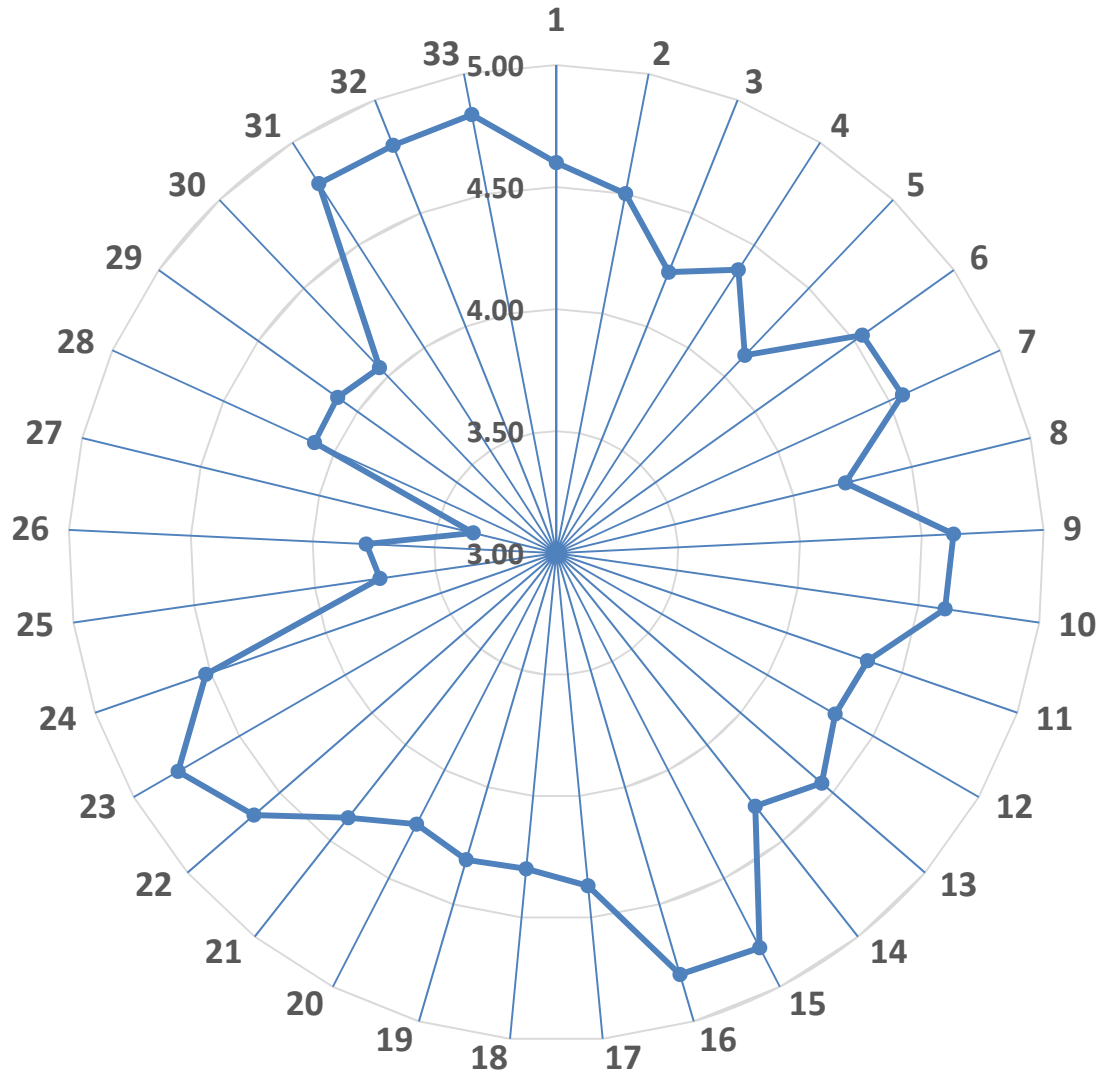
With the exception of parking in Cornwall, visitor satisfaction levels with their Cornwall experience were very high.

The highest levels of satisfaction were with the overall enjoyment of visit (4.83), quality of the beaches (4.82) and cleanliness of the beaches (4.80) and lowest were for all aspects of parking in the county.

Visitor satisfaction score ranking

Satisfaction indicator	Score	Ranking	Satisfaction indicator	Score	Ranking
Overall enjoyment of your visit	4.83	1	Road signs	4.37	18
Quality of the beaches	4.82	2	Places to visit/attractions - value for money	4.35	19
Cleanliness of the beaches	4.80	3	Theatre/galleries/museums - range	4.32	20
Overall impression of Cornwall in terms of general atmosphere	4.80	4	Theatre/galleries/museums - value for money	4.32	21
Overall impression of Cornwall in terms of feeling of welcome	4.80	5	Display maps & information boards	4.31	22
Enjoyment of using the South West Coast Path	4.79	6	Pedestrian signs	4.30	23
Upkeep of the parks & open spaces	4.64	7	Public transport - quality of service	4.25	24
Places to visit/attractions - range	4.63	8	Shopping - range	4.24	25
Places to visit/attractions - quality of service	4.61	9	Places to eat & drink - value for money	4.22	26
Accommodation - quality of service	4.60	10	Shopping - value for money	4.12	27
Places to eat & drink - quality of service	4.56	11	Nightlife/evening entertainment - quality of service	4.10	28
Places to eat & drink - range	4.54	12	Nightlife/evening entertainment - range	4.09	29
Cleanliness of the streets	4.52	13	Nightlife/evening entertainment - value for money	4.05	30
Accommodation - value for money	4.50	14	Parking - quality of service	3.78	31
Theatre/galleries/museums - quality of service	4.44	15	Parking - ease of parking	3.73	32
Shopping - quality of service	4.38	16	Parking - value for money	3.35	33
Public transport - value for money	4.38	17			

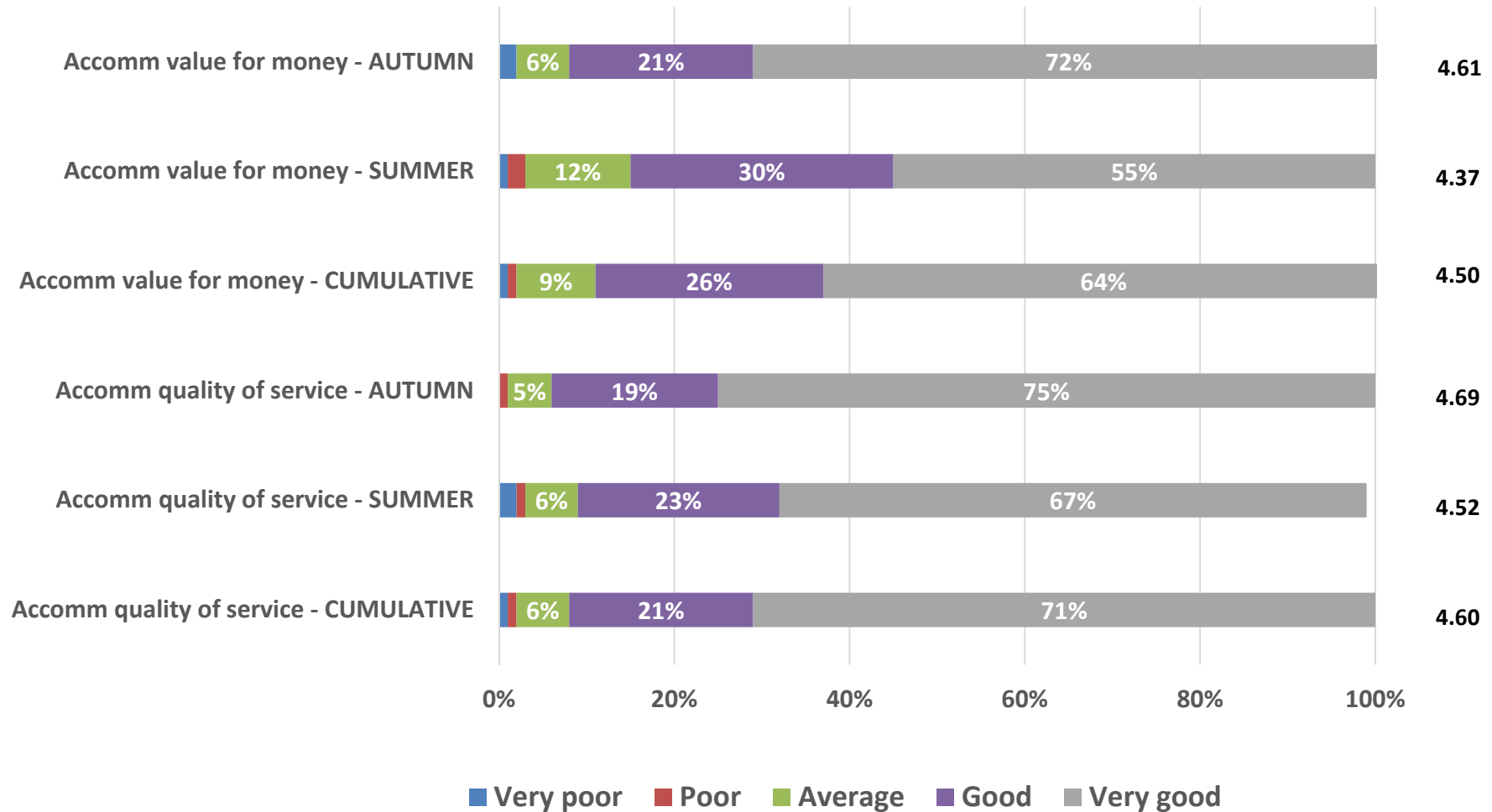
Visitor satisfaction scores



A breakdown of the satisfaction scores by period of interview are shown on the pages to follow but, across the board, satisfaction levels were highest amongst autumn respondents compared with those visiting during the summer.

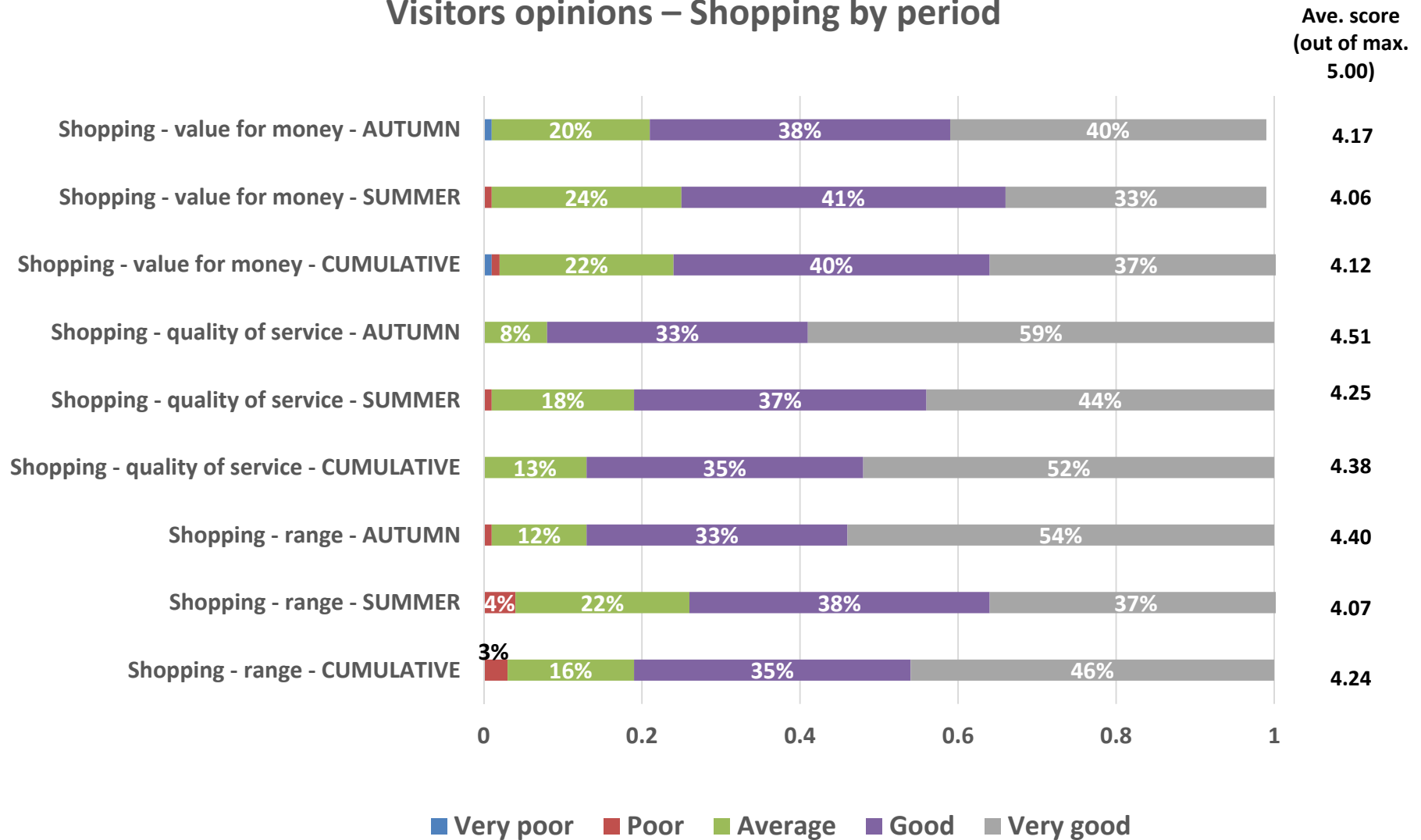
Visitors opinions – Accommodation by period

Ave. score
(out of max.
5.00)



Staying visitors' opinions of all aspects of their accommodation in Cornwall were high and included 4.60 out of 5.00 for quality of service and 4.50 for value for money. Autumn respondents rated each of the accommodation indicators higher than summer respondents.

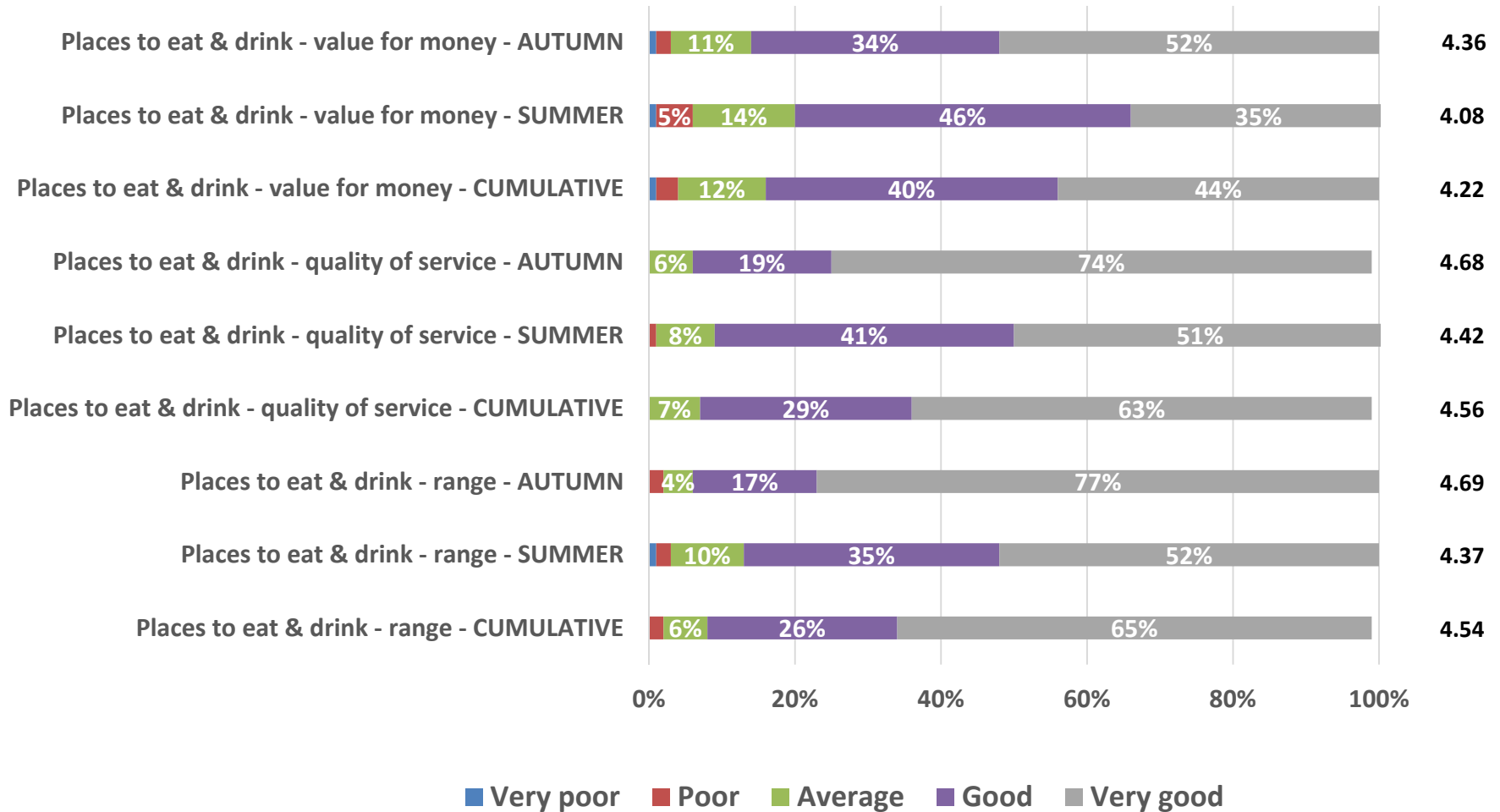
Visitors opinions – Shopping by period



Visitors' opinions of all aspects of shopping in Cornwall were also very good and included 4.24 out of 5.00 for range of shops, 4.38 for quality of service and 4.12 for value for money. Autumn respondents rated each of the shopping indicators higher than summer respondents.

Visitors opinions – Places to eat & drink by period

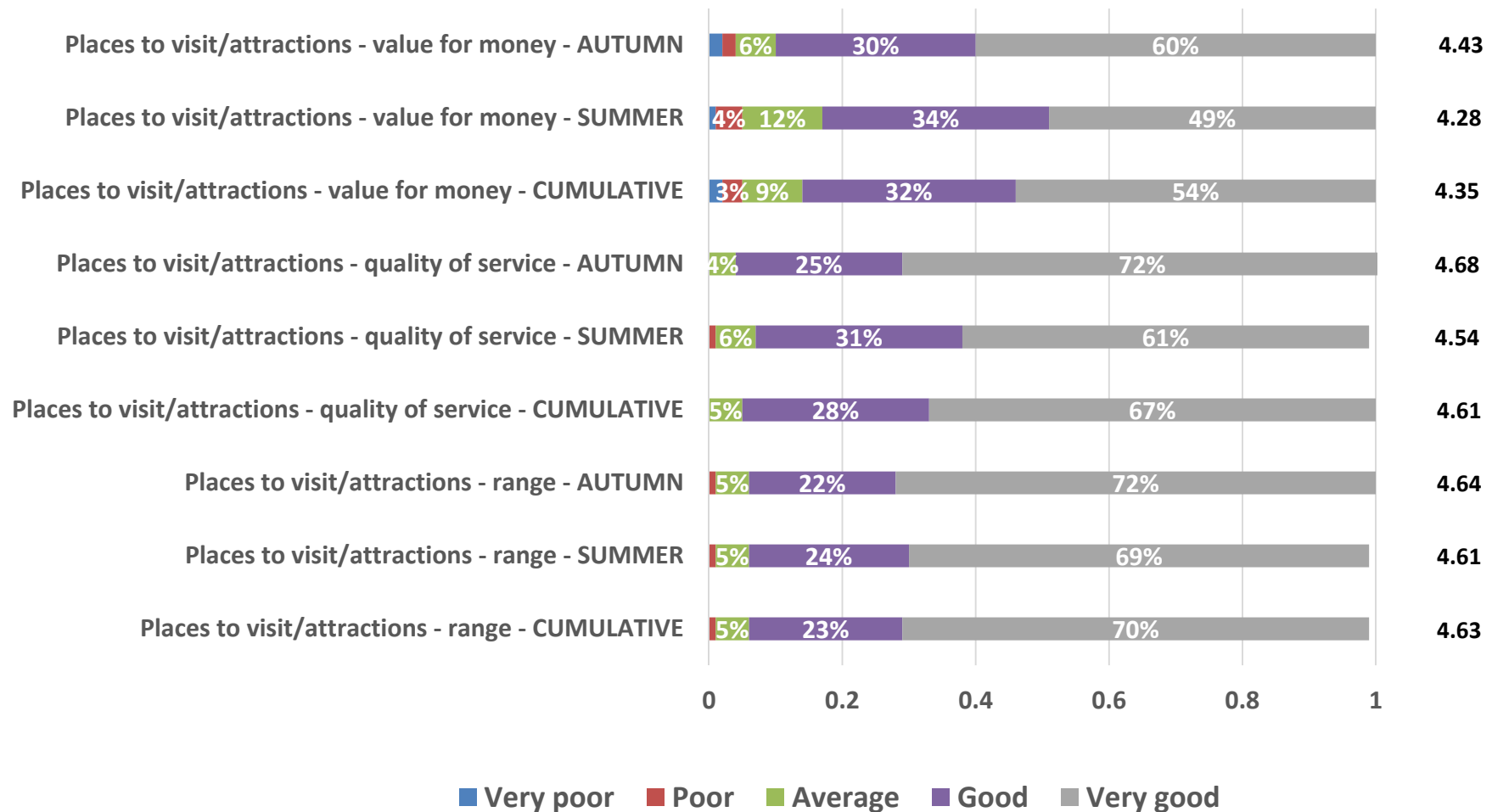
Ave. score
(out of max.
5.00)



Visitors' opinions of all aspects of places to eat & drink in Cornwall were also very high and included 4.54 out of 5.00 for range of places to eat & drink, 4.56 for quality of service and 4.22 for value for money. Autumn respondents once again rated each of the places to eat & drink indicators higher than summer respondents.

Visitors opinions – Places to visit/attractions by period

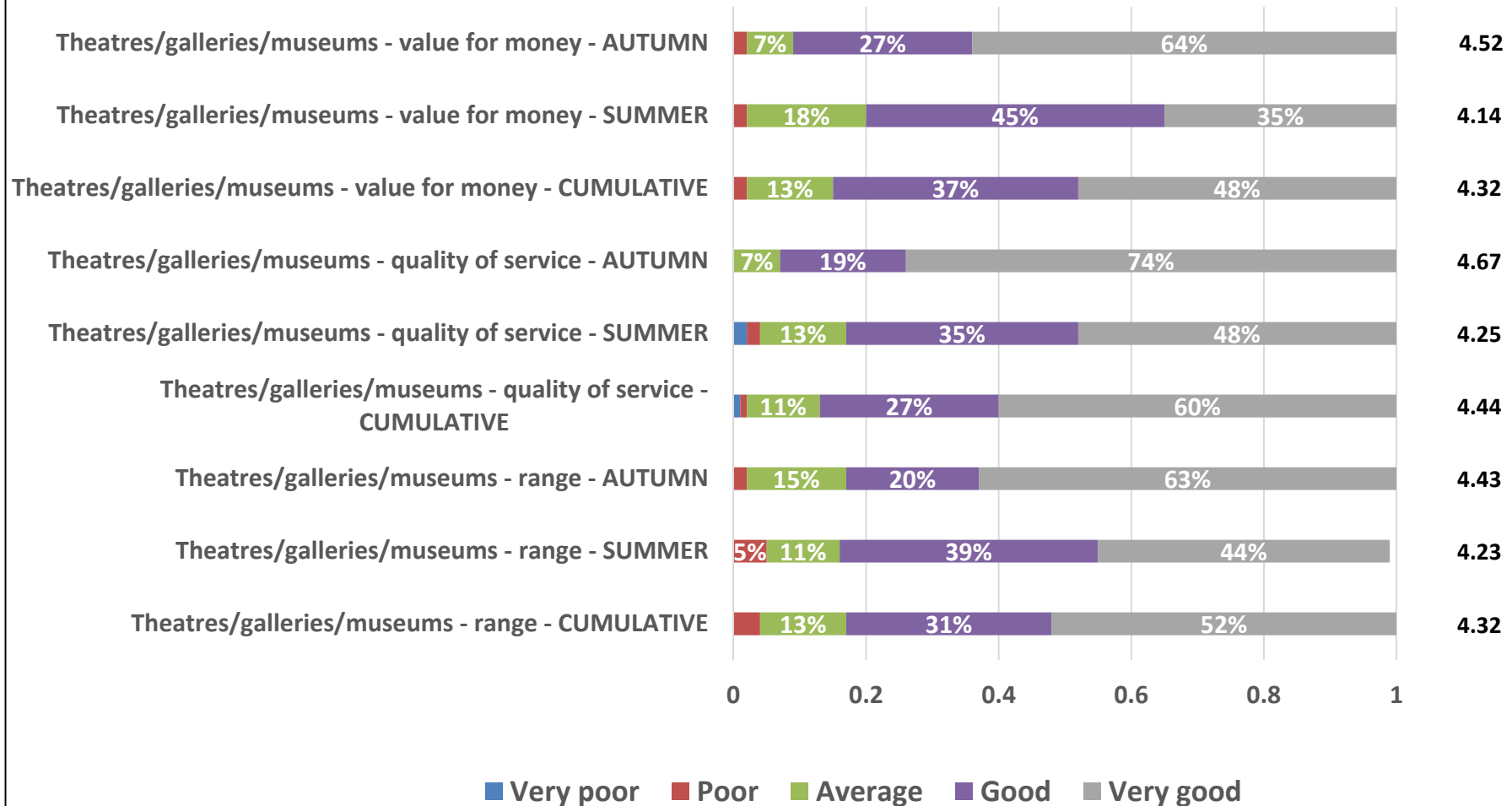
Ave. score
(out of max.
5.00)



Visitors' opinions of all aspects of places to visit/attractions in Cornwall were also very good and included 4.63 out of 5.00 for range of places to visit/attractions, 4.61 for quality of service and 4.35 for value for money. Autumn respondents once again rated each of the places to visit/attractions indicators higher than summer respondents.

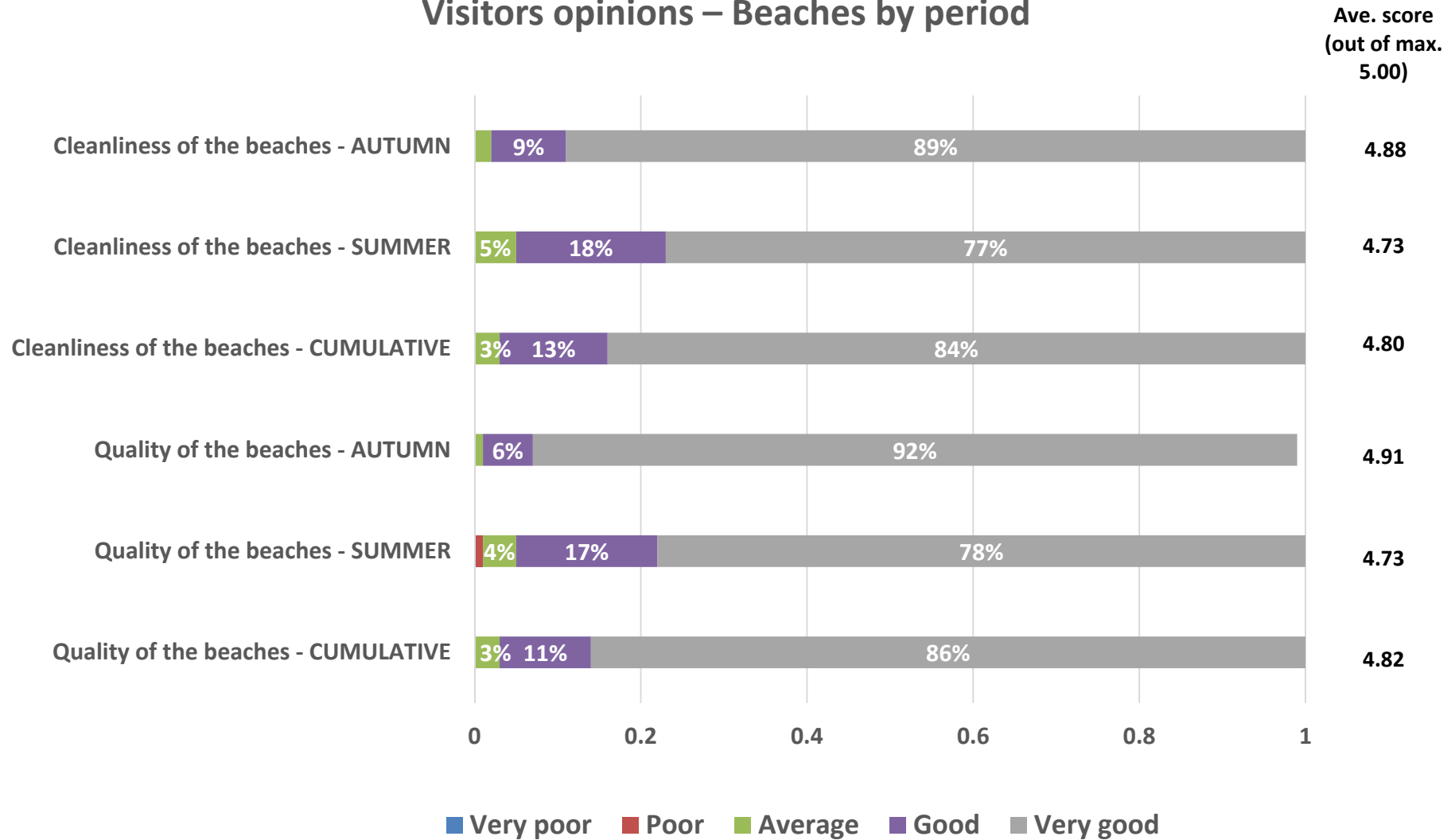
Visitors opinions – Theatres/galleries/museums by period

Ave. score
(out of max.
5.00)



Visitors' opinions of all aspects of the theatres/galleries/museums in Cornwall were very high and included 4.32 out of 5.00 for range of theatres/galleries/museums, 4.44 for quality of service and 4.32 for value for money. Autumn respondents once again rated each of the theatres/galleries/museums indicators higher than summer respondents.

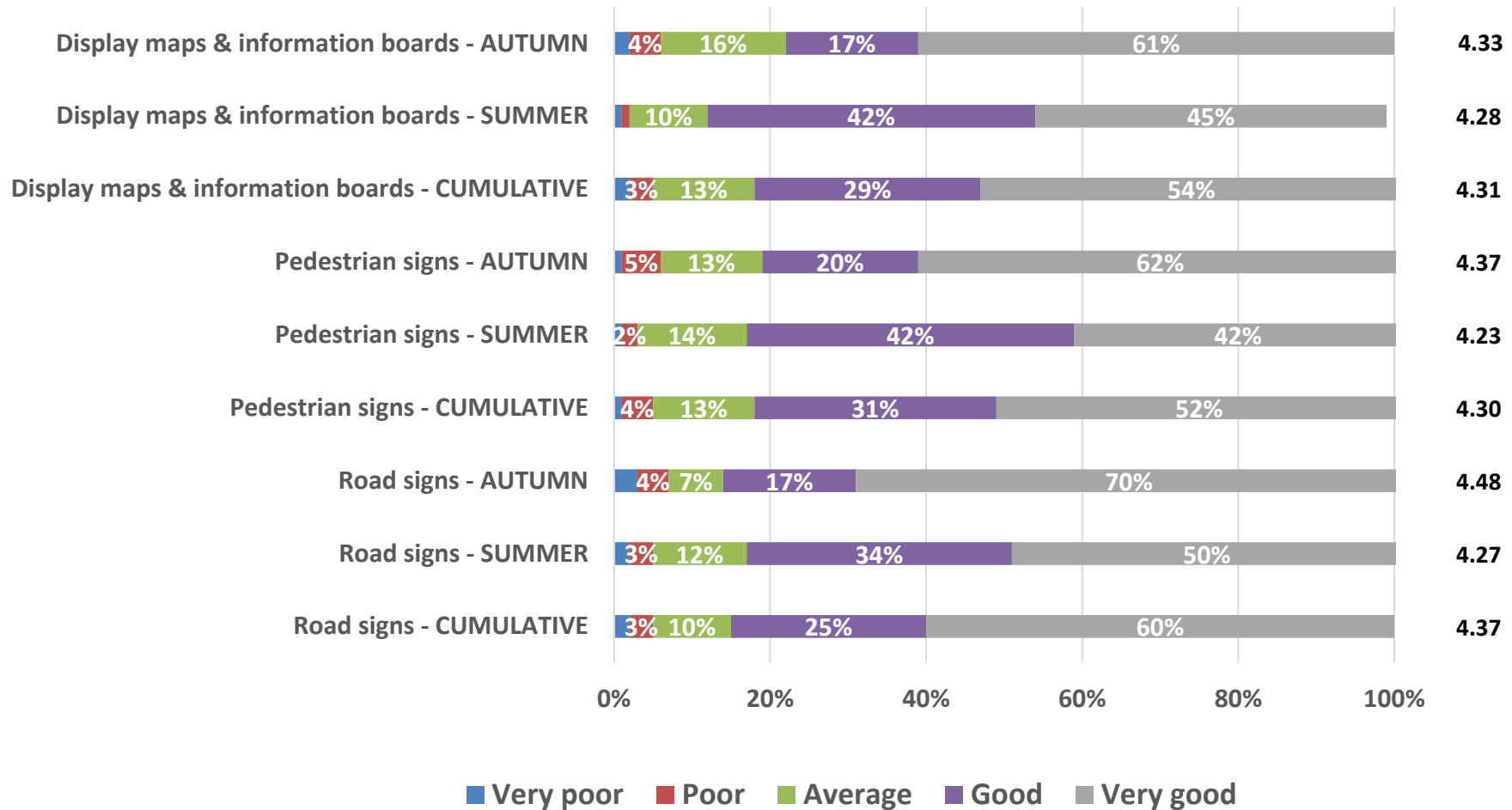
Visitors opinions – Beaches by period



Visitors’ opinions of the quality of the beaches (4.82) and cleanliness of the beaches (4.80) were the two highest scores of all the indicators being explored by the survey after the score for the overall enjoyment of visit (4.83). Autumn respondents rated both indicators higher than summer respondents.

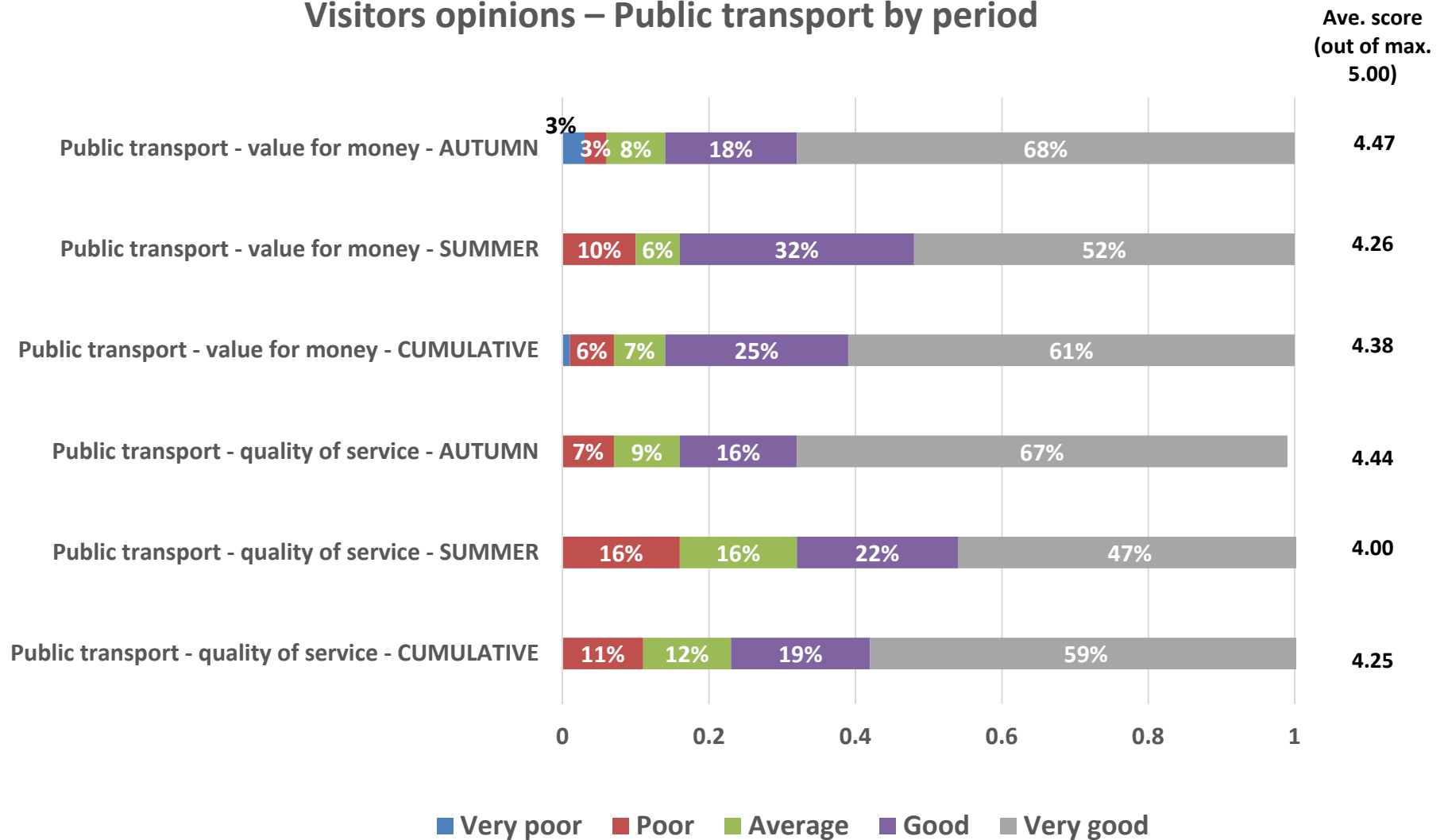
Visitors opinions – Ease of finding way around by period

Ave. score
(out of max.
5.00)



Visitors' opinions of the road signs (4.37), pedestrian signs (4.30) and display maps and information boards in Cornwall (4.31) were all rated highly. Autumn respondents rated all the ease of finding way around indicators higher than summer respondents.

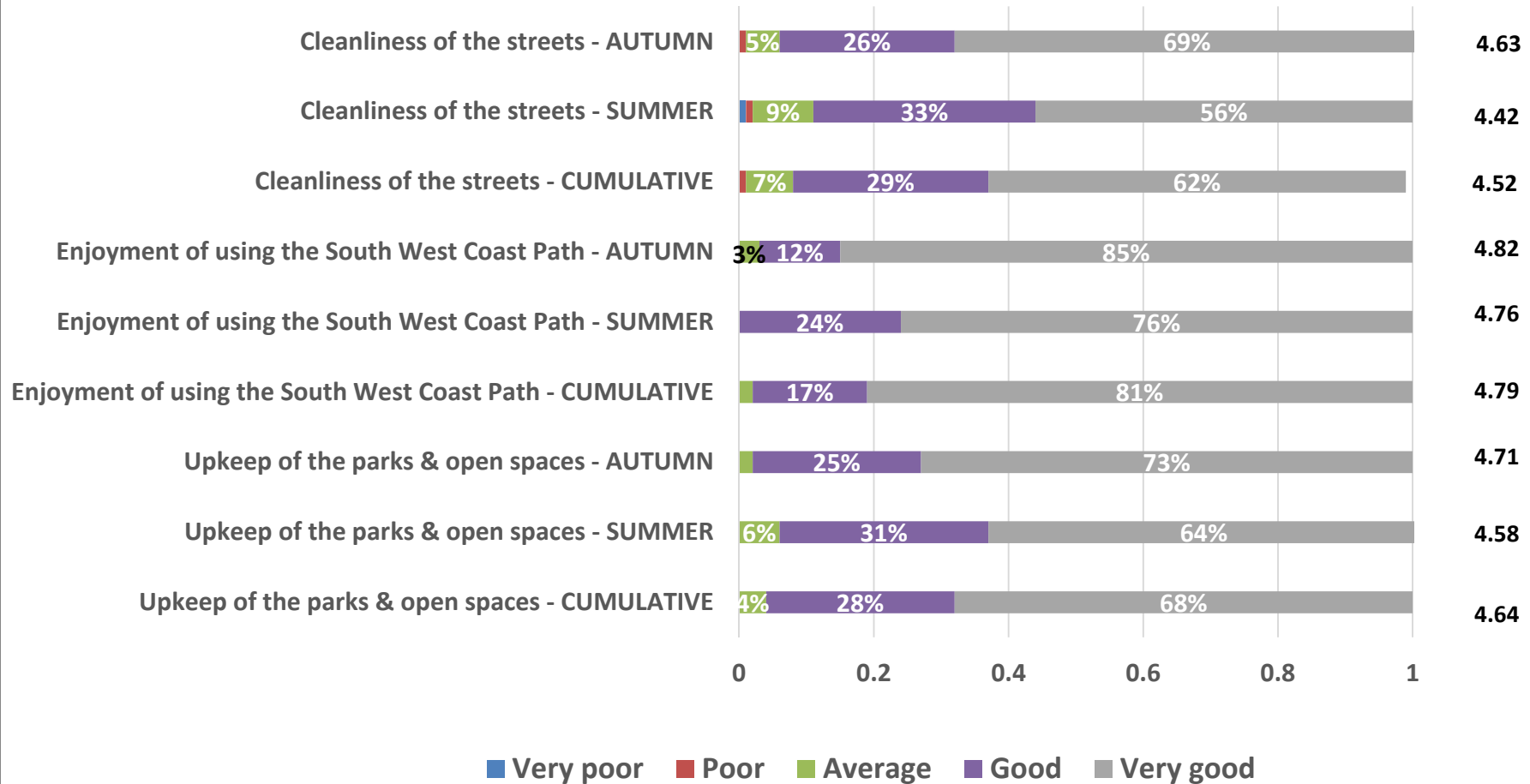
Visitors opinions – Public transport by period



Visitors' opinions of public transport in Cornwall were all rated highly and ranged from 4.25 out of 5.00 for quality of service and 4.38 for value for money. As with all the other indicators, autumn respondents rated all aspect of public transport higher than summer respondents.

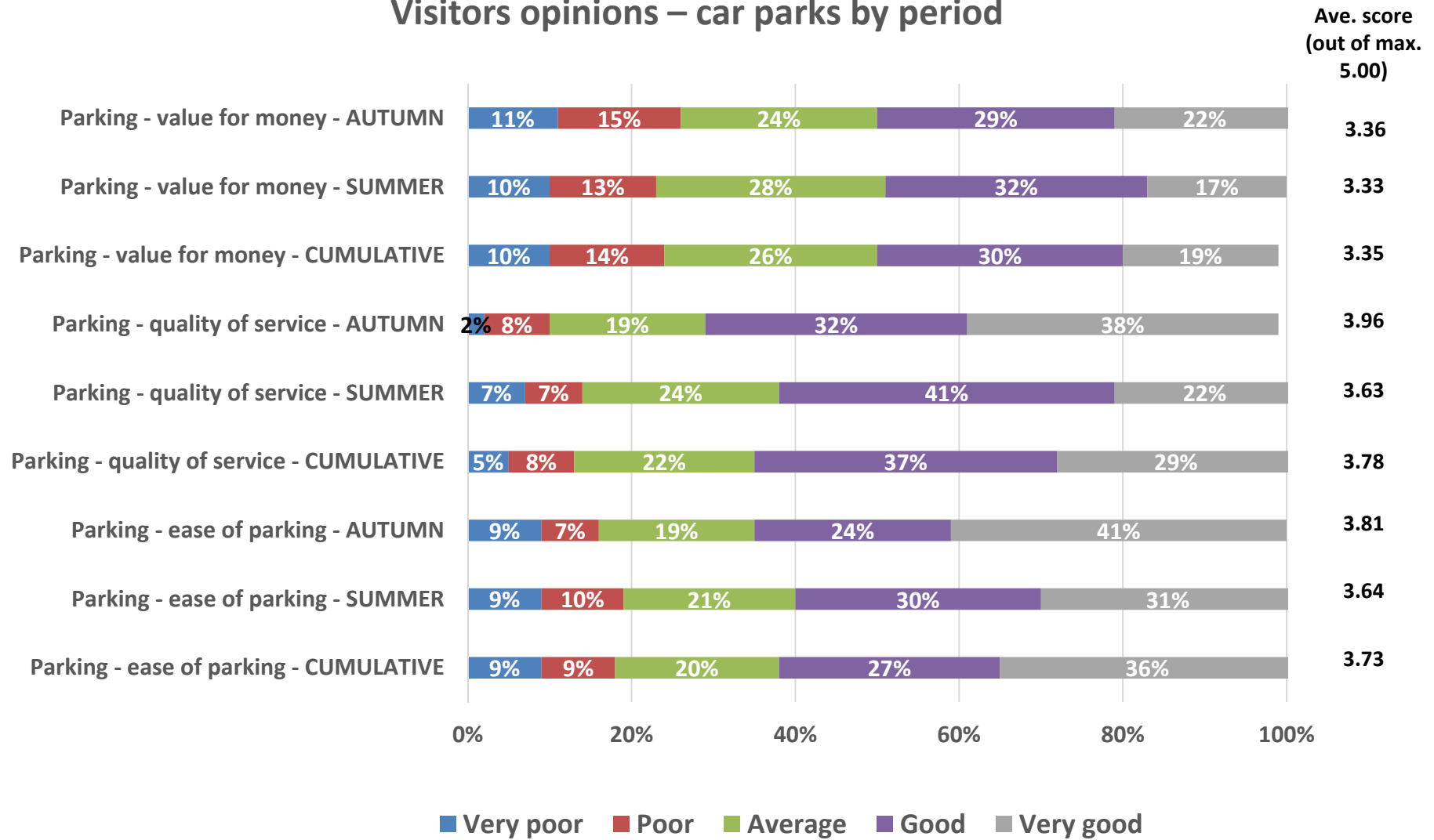
Visitors opinions – Parks & open spaces, South West Coast Path & cleanliness of the streets by period

Ave. score
(out of max.
5.00)



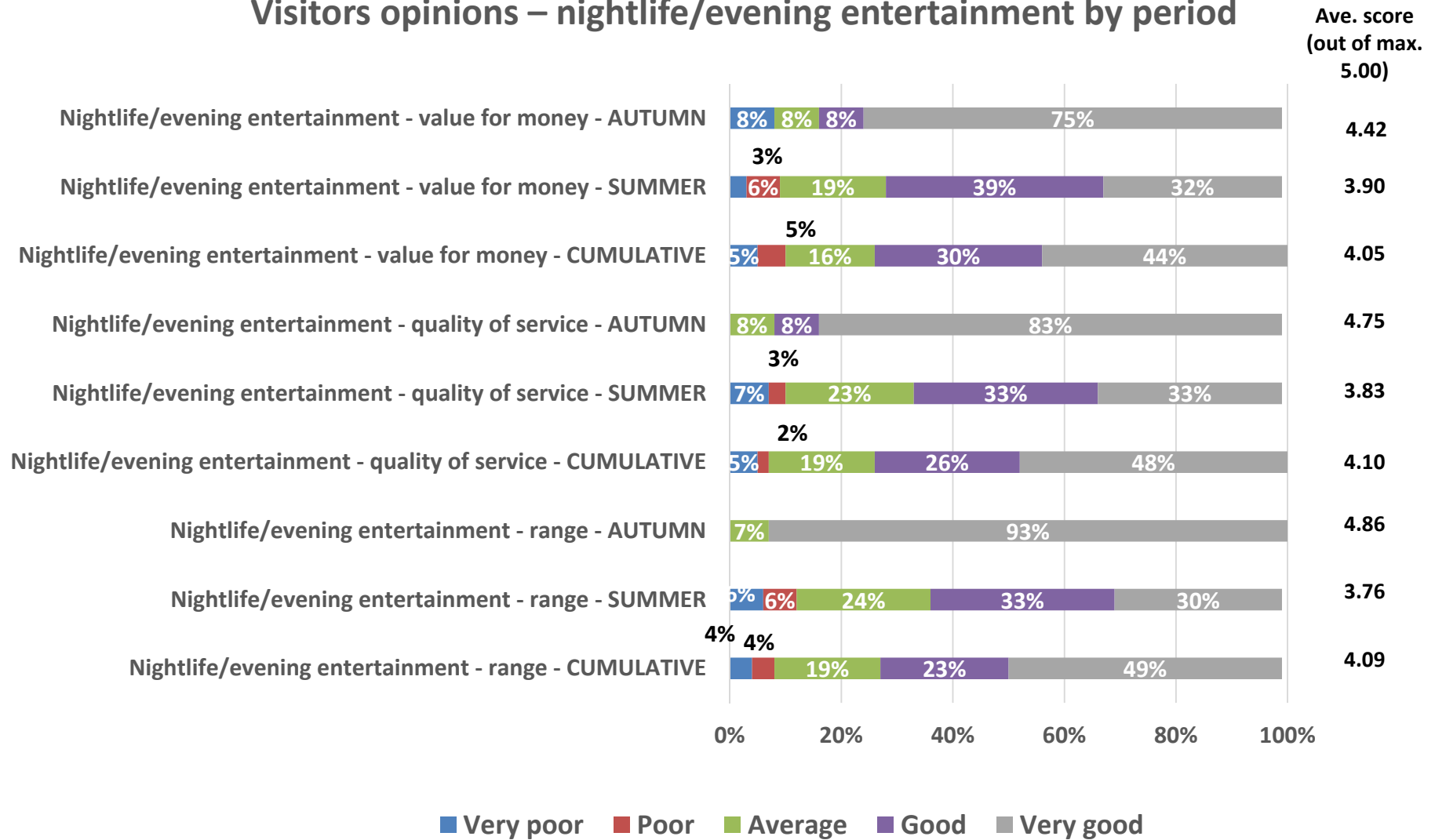
Visitors' opinions of the parks/open spaces (4.64), South West Coast Path (4.79) and cleanliness of the streets in Cornwall (4.52) were all rated highly. Once again, autumn respondents rated all of the indicators higher than summer respondents.

Visitors opinions – car parks by period



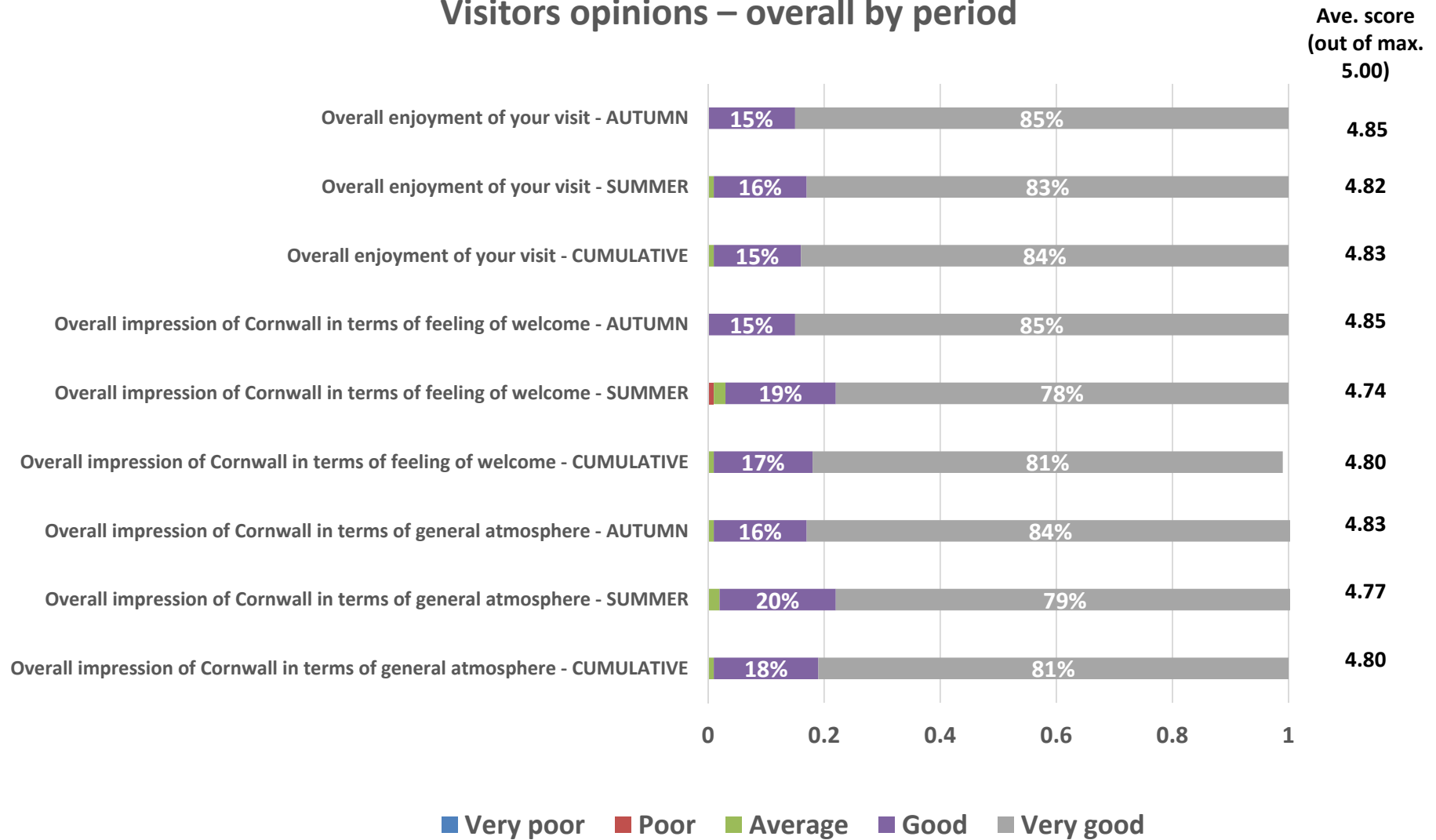
The ease of parking (3.73), quality of service (3.78) and value for money of parking in Cornwall (3.35) were the three lowest ranked indicators in terms of visitor satisfaction being explored by the survey. There was little variation in the results according to period of interview.

Visitors opinions – nightlife/evening entertainment by period



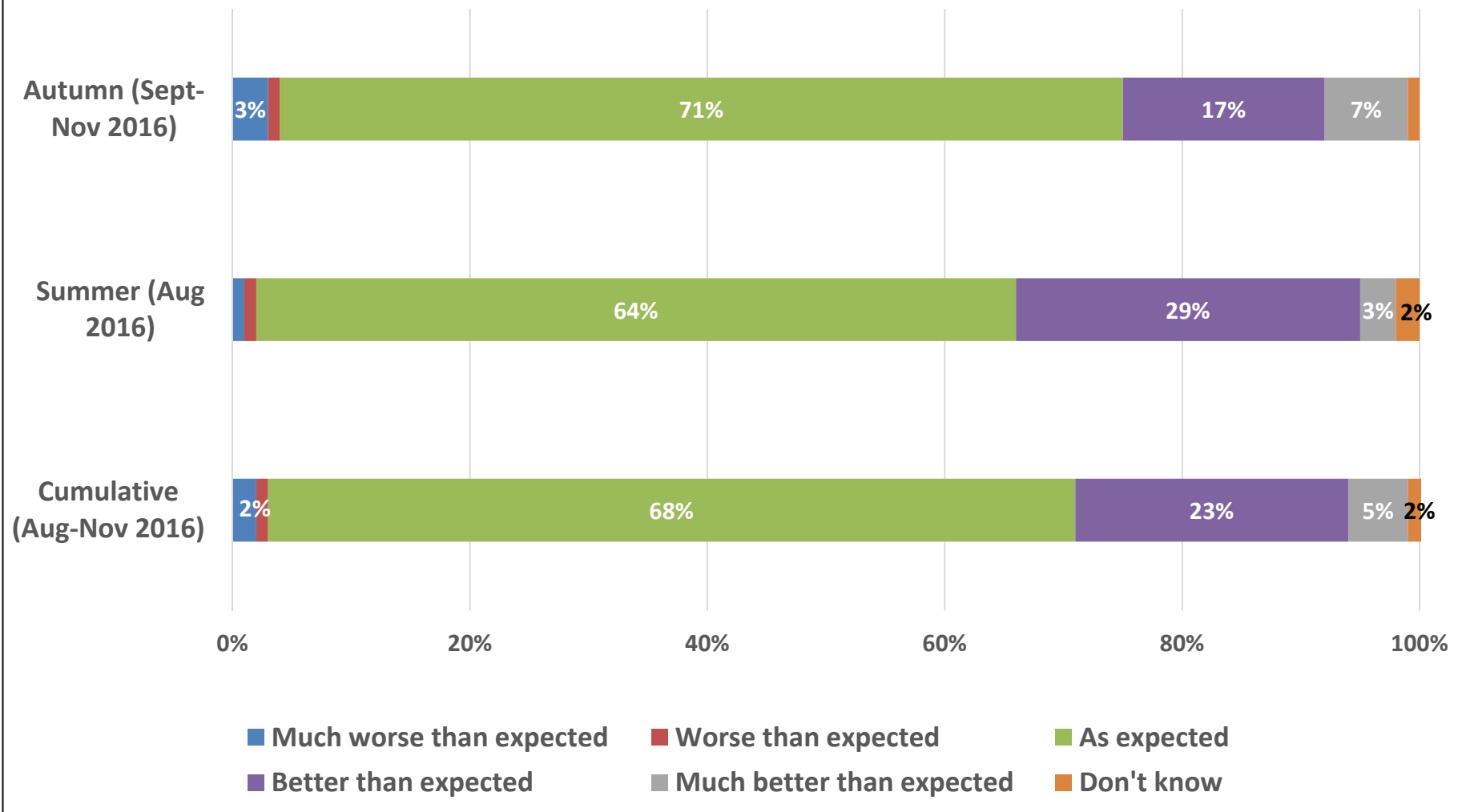
All aspects of nightlife/evening entertainment in Cornwall were rated good to very good including 4.09 for the range, 4.10 for quality of service and 4.05 for value for money. Autumn respondents rated all aspects of nightlife/evening entertainment higher than summer respondents.

Visitors opinions – overall by period



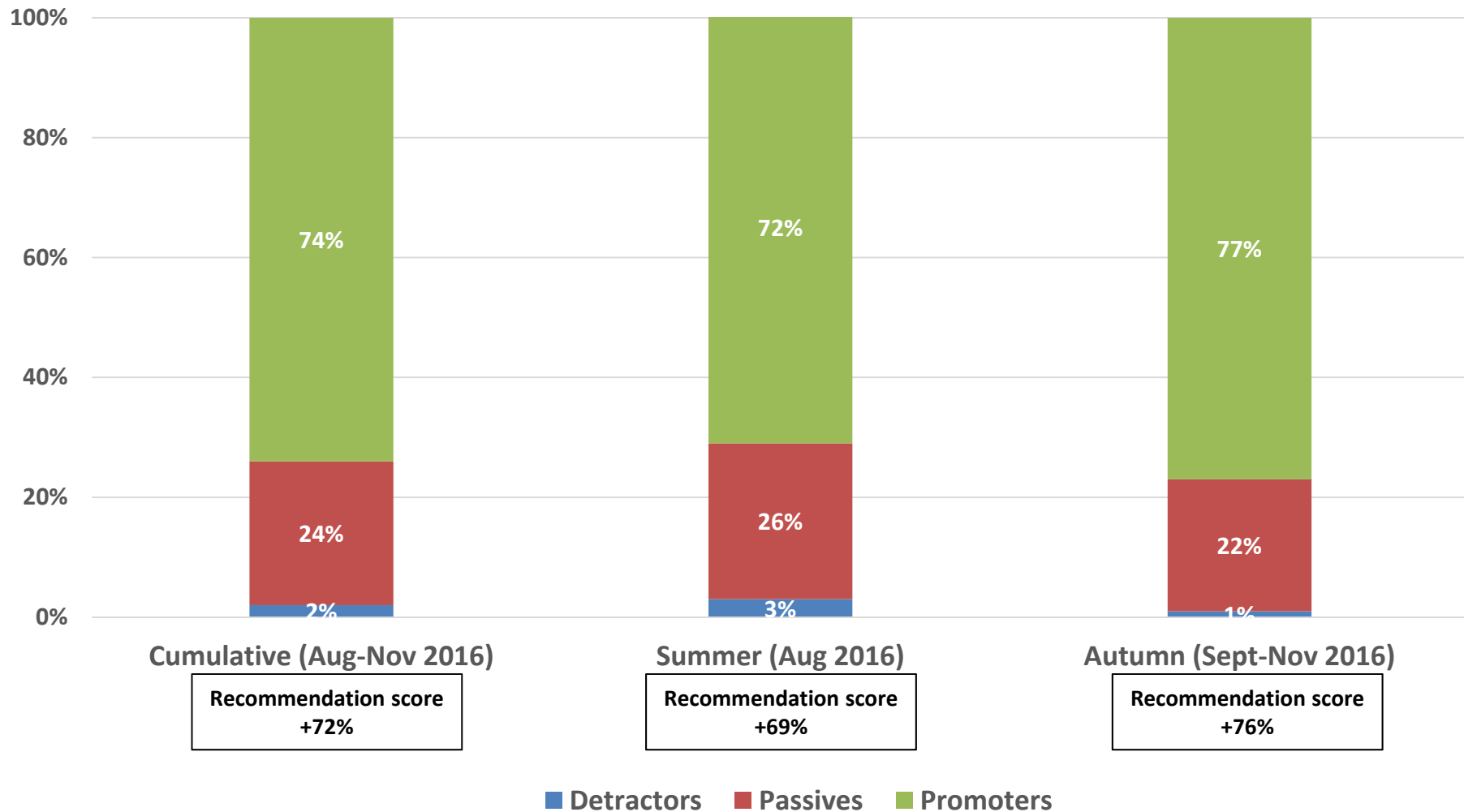
Visitors' opinions of the general atmosphere and feeling of welcome in Cornwall (4.80 in each case) were the fourth highest indicators of all the 33 being explored by the survey. At 4.83 out of 5.00 overall enjoyment of visit was the highest ranked indicator amongst visitors' to the county. Autumn respondents rated each aspect higher than summer respondents.

How visit to Cornwall lived up to expectations



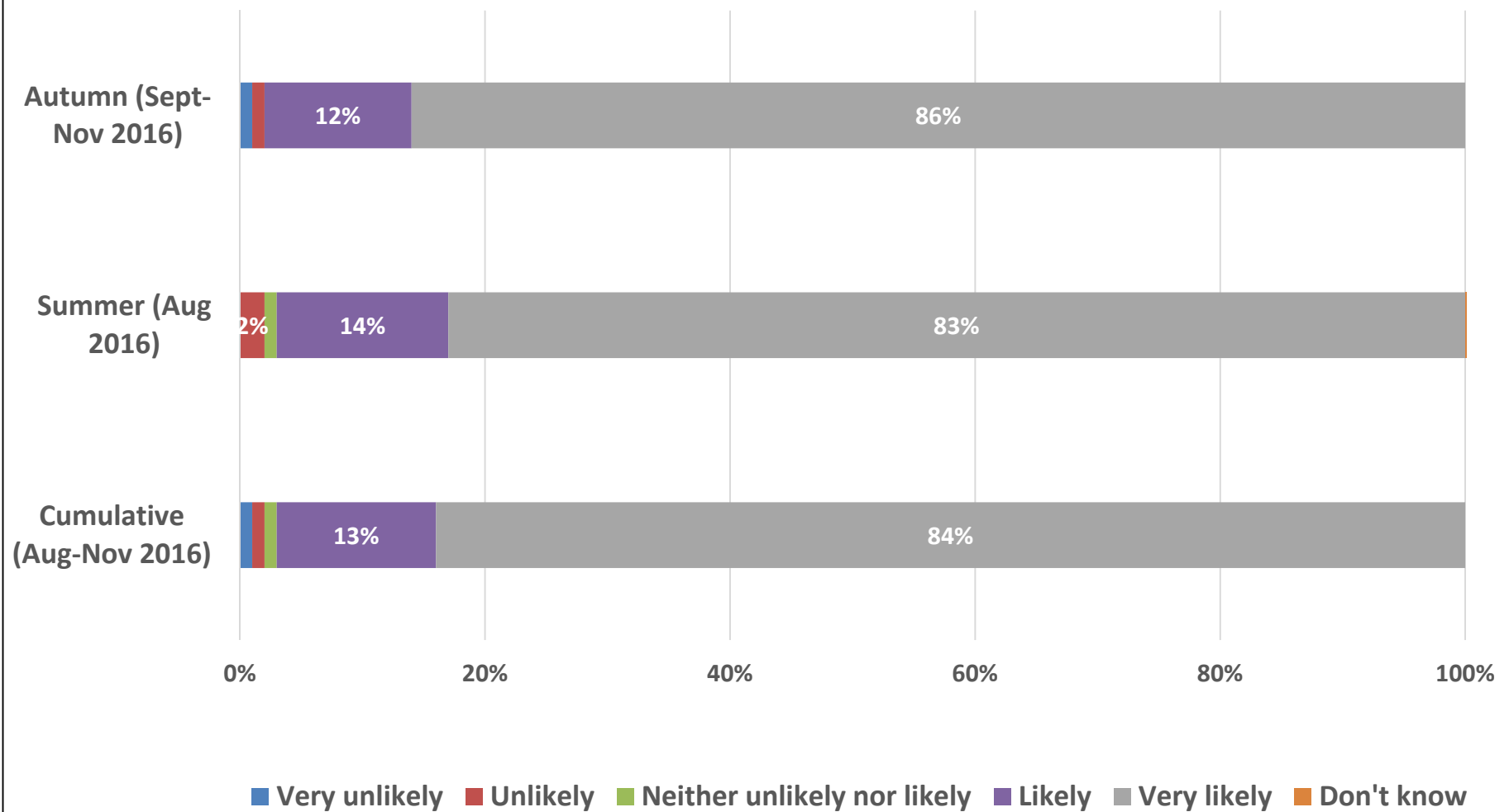
68% of all respondents including 64% and 67% of summer and autumn respondents respectively said their visit to Cornwall had met with their expectations. 28% said their visit had been better or much better than they expected including 32% of summer and 30% of autumn respondents respectively.

Recommendation score for visit to Cornwall



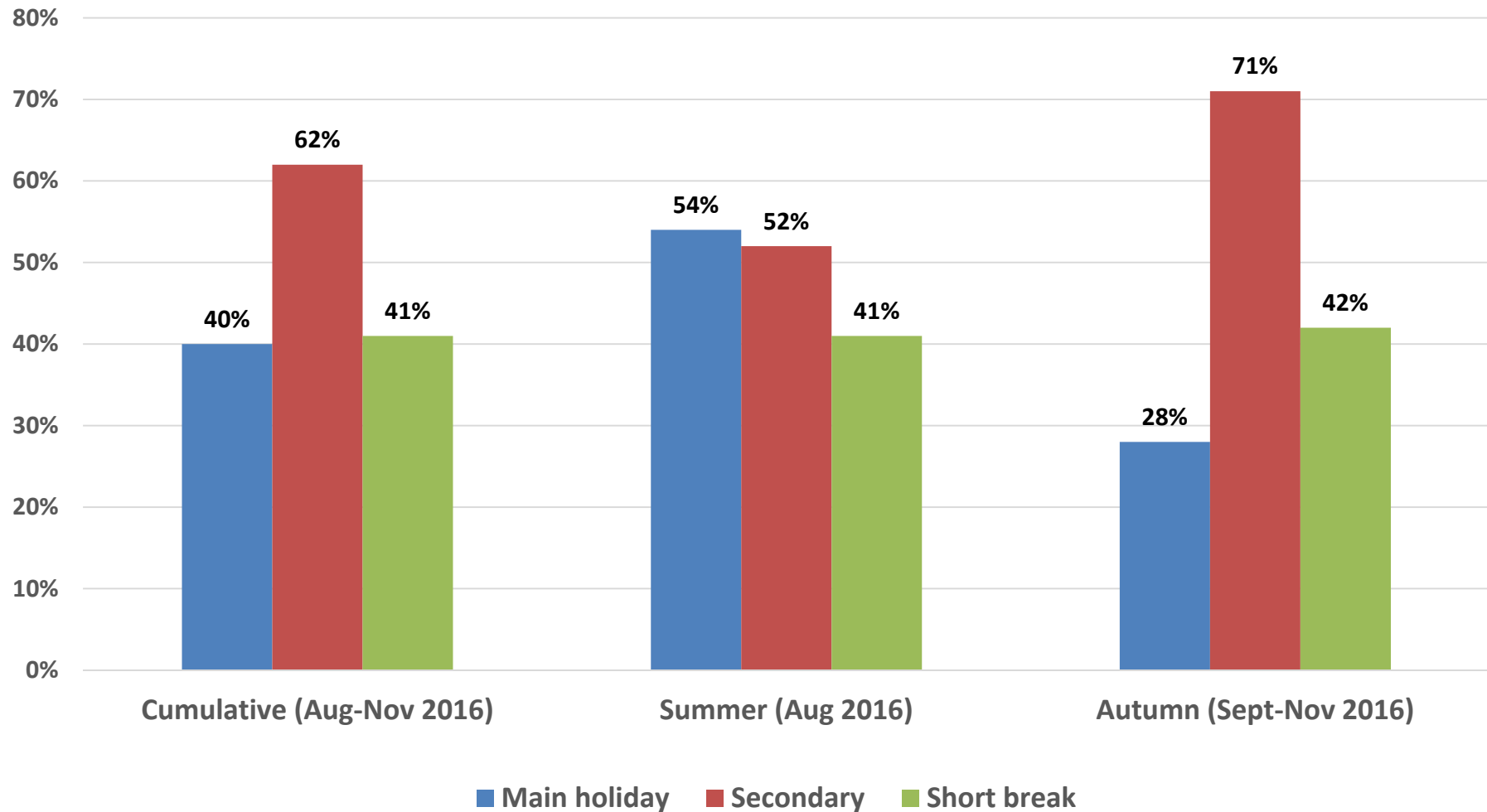
Respondents gave Cornwall a recommendation score of +72% for their likelihood of recommending it as a place to visit to their friends/family ranging from +69% for summer respondent and +67% for autumn respondents. These are very high scores on a metric that can range from -100% to +100%.

Likelihood to visit Cornwall again in the future



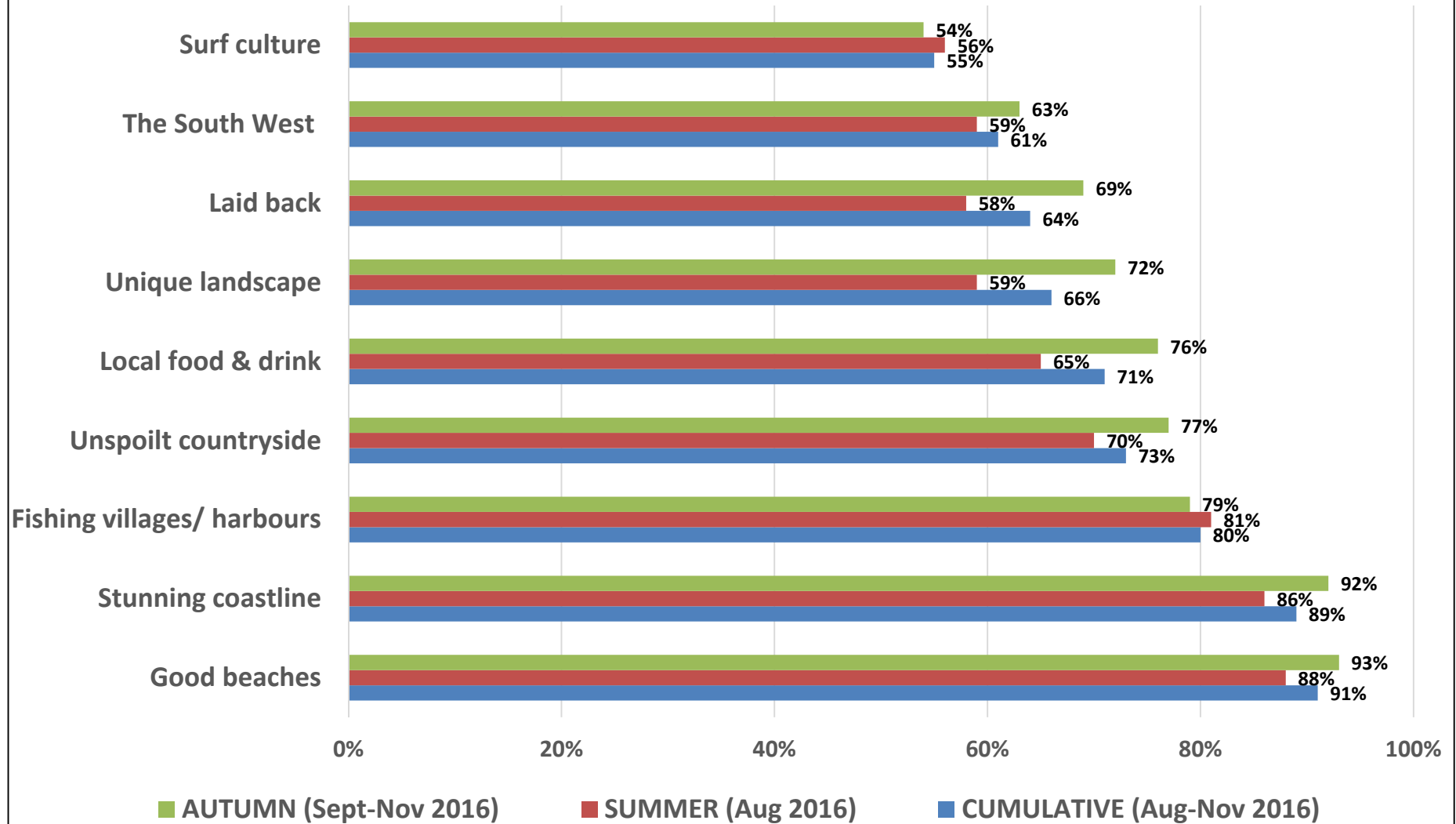
84% of respondents said they would be very likely to visit Cornwall again in the future including 83% and 86% of summer and autumn respondents respectively.

Type of trip likely to re-visit Cornwall for



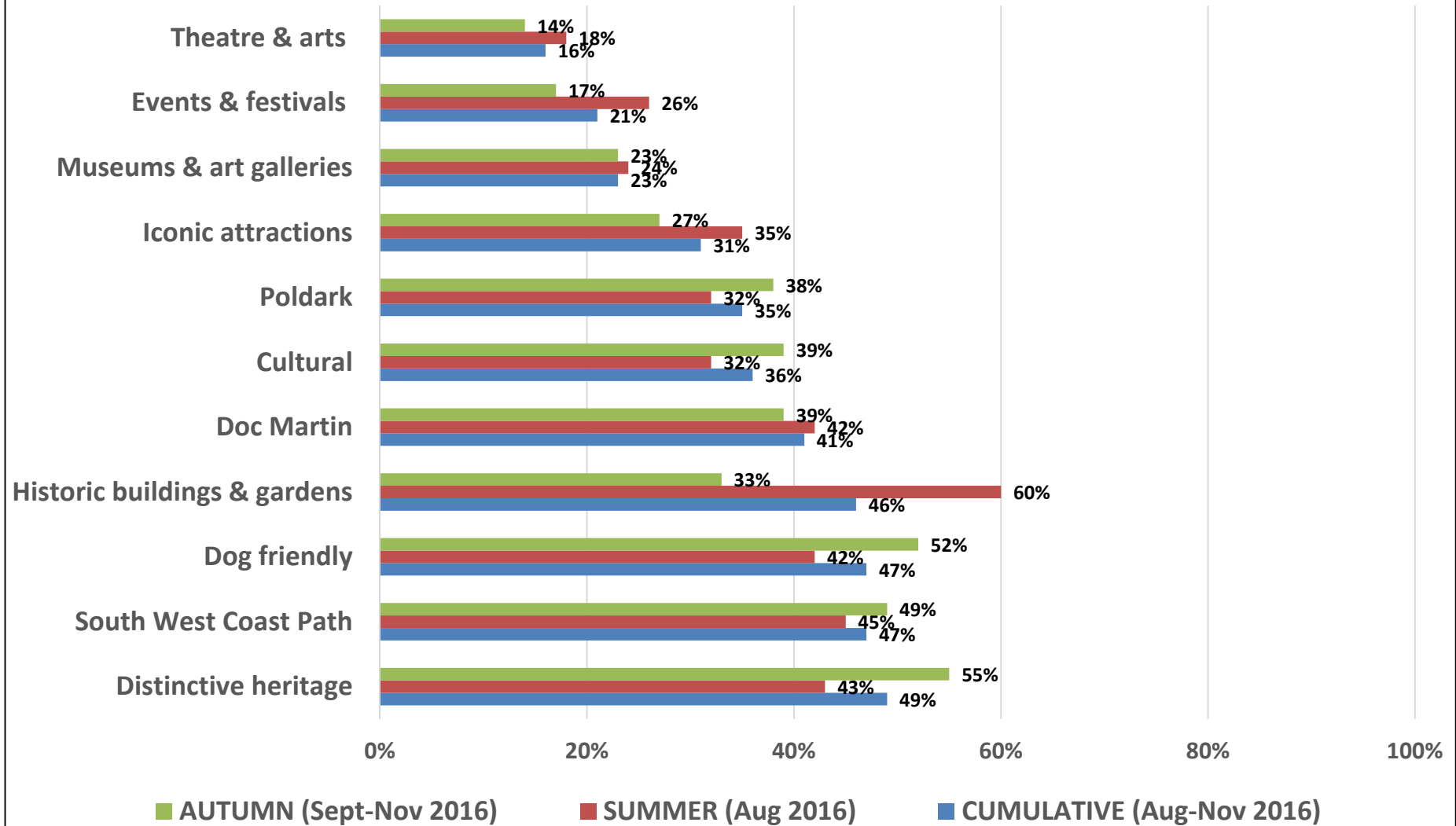
40% of respondents would be likely to re-visit Cornwall again in the future for a main holiday including 54% and 28% of summer and autumn respondents respectively. The largest proportion of respondents (62%) would be likely to re-visit for a secondary holiday (including 52% of summer respondents and 71% of autumn respondents). 41% of respondents would be likely to re-visit for a short break including 41% and 42% of summer and autumn respondents respectively.

Words associated with Cornwall



The words most associated with Cornwall, regardless of the period of interview were; Good beaches; stunning coastline, fishing villages/harbours, unspoilt countryside and local food & drink.

Words associated with Cornwall



The words least associated with Cornwall, regardless of the period of interview were; Theatre & arts, events & festivals and museums & art galleries.

Cornwall Visitor Survey 2016

The South West Research Company Ltd

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