Visitor intelligence for Lincolnshire[1]:

Volume and value, Visitor experience and satisfaction, Segmentation, Intelligence gaps

Prepared by Melanie Sensicle
Melanie Sensicle Consulting Ltd

November 2016

---

[1] Throughout this report the word Lincolnshire is used to describe the areas administered by Lincolnshire County Council, North Lincolnshire Council and North East Lincolnshire Council and the Greater Lincolnshire LEP.

Table of contents

Introduction

In February 2016, Lincolnshire County Council commissioned a review of tourism in the Greater Lincolnshire area. The review reported in May 2016 and recommended that better visitor intelligence could support visitor economy growth in a number of ways:

➢ By helping the county's industry and public sector stakeholders become more customer focused;
➢ By supporting good decision making, particularly investment;
➢ By providing guidance for promotional activity;
➢ By suggesting where to develop and improve the product;
➢ By promoting collaboration within the county where there are common interests.

The report recommended that three types of visitor intelligence was needed:

• Visitor profiling/segmentation: to produce a clear picture of who is visiting, an analysis of their characteristics, interests, information channels, motivations and as well as good understanding of future visitor trends.

• Visitor satisfaction: information about what visitors like, don't like and what would encourage them to stay longer and return more often to help with product development and promotion.

• Identification of non-visitor groups: including a better understanding of who isn't visiting Lincolnshire and why to help develop new product and new audiences.

The report suggested that the starting point for improving visitor intelligence should be to gather existing information and interrogate it to identify what is and what isn't already known.

In July 2016 Lincolnshire County Council commissioned a follow-on project as a first step to towards improving and updating visitor intelligence for Greater Lincolnshire.

Project approach

The project was conducted in two phases.

Over summer and autumn 2016, phase 1 involved primary research. Arkenford, the company that produced a segmentation report for the county in 2009, carried this out. It involved an incentivised online survey that generated 748 partially completed and 467 fully completed surveys plus an analysis of 87,000 postcodes.

Arkenford's report provides general information about visitors' awareness, perceptions, information sources and visiting patterns as well as segmentation analysis that highlights which groups are visiting in the largest numbers with updated pen portraits of the characteristics of each group. Their report is provided in its entirety as part of this document. All the consumer contacts and postcodes used by Arkenford were supplied by destination organisations and businesses in Lincolnshire.

Phase 2, in early autumn, involved secondary research, reviewing research reports that have been produced by local authorities, destination organisations and tourism businesses since 2011. Its purpose was to supplement intelligence produced in phase 1 by updating basic visitor economy facts and figures and finding out how much is known about visitor satisfaction levels - an area of intelligence that isn't covered by a segmentation study. The review also identified intelligence gaps.

Over 50 reports or varying length and relevance were supplied and read. Of these 13 were looked at in detail and 5 that contained intelligence about visitor satisfaction picked out for further analysis. Desk research took place to supplement local intelligence. Information sources include: Visit England's Brand Tracker, Visit England's Destination Information System, Visitor Attraction VQAS reports for 2016 and online review and bookings sites including Trip Advisor, Expedia and Bookings.com.

Basic visitor intelligence

Basic visitor intelligence for Greater Lincolnshire is of good quality and is comprehensive. The economic impact assessment model, STEAM, has been used in the county since at least 2009, managed by Lincolnshire County Council. The annual EIA reports provide detail on the volume and value of tourism, the percentage of types of visitors to the area including day visitors, staying visitors and staying friends and relations, a sectoral analysis to look at where the visitor pound is being spent and information on seasonality.

The most recent report is dated August 2016. This is more comprehensive and looks at trends over a 7-year period from 2009 to 2015, plus year on year percentage changes across a range of measures as well as comparing 2014 performance with 2015.

Its findings are positive, showing improvement and growth across the board with just a few dips mainly in line with national trends. The report headlines include:

➤ Almost 20million people visited Lincolnshire in 2015
➤ Visitor numbers have grown 15.5% between 2009 and 2015

➤ The visitor economy had an impact of £1.34bn on the Lincolnshire economy in 2015
➤ The impact of the visitor economy has grown 38.4% between 2009 and 2015

➤ Over 15,600 people are directly employed in the visitor economy
➤ Direct employment has grown by over 13% between 2009 and 2015.

➤ Staying visitors account for 17% of overall visitor numbers but contribute 57% of the economic impact.

➤ Staying visitors spend supports almost twice the number of jobs than day visitors

➤ Shopping, food and drink and indirect expenditure are the main beneficiaries of the visitor pound

As well as segmenting Greater Lincolnshire's visitors Arkenford's survey has produced additional basic visitor intelligence. The headlines are:

➤ The top four destinations for visitors are Lincoln, Mablethorpe, Skegness and the Lincolnshire Wolds

➤ The main demographic of visitors that completed a survey were aged over 45 with no kids living at home
➤ People aged between 25 and 44 are interested in visiting Lincolnshire

➤ The most used source of information before visiting is the internet
➤ The most used source of information during a trip is a TIC or brochure but internet is second

➤ Lincolnshire exceeds expectations for over half of the people surveyed
➤ Lincolnshire compares well to other UK destinations, in particularly for rural and coastal getaways

➢ Visitors associate Lincolnshire with open space, attractive countryside and big skies.
➢ The activities that visitors associate with Lincolnshire are walking, cycling and coastal activities
➢ The family offer is not strongly associated with Lincolnshire despite the area having family product

➢ The top two types of holiday taken by those surveyed were rural and traditional holidays

➢ Lincolnshire is perceived as a place to enjoy peace and quiet and the outdoors

➢ Limited awareness of the destination and knowledge of what it has to offer are the two main barriers to people visiting

These headlines and the detailed reports that underpin them make it clear that there is a considerable amount of basic knowledge about visitors to Greater Lincolnshire. The STEAM trends report and slides 3-26 of Arkenford's 2016 report provide information about the whole of Greater Lincolnshire and provide a context for more local visitor intelligence. Local visitor intelligence exists for many destinations or local authority areas but not all. However there is no consistency in how or when information is gathered or what information is asked for which makes easy comparison hard to do.

Visitor segmentation updated

In 2009 Arkenford produced a comprehensive segmentation study for the county. 3000 interviews were conducted to produce insights into the people visiting the county, and grouped them into value-based segments, with portraits of each group. The report provided ideas on segments that could be targeted in the future as well as insights into image and awareness of the destination. Arkenford's work was well received across the county and was used to inform marketing and development activity.

In 2016 a smaller study comprising 748 surveys and analysis of 87,000 postcodes has updated the earlier report looking at what has stayed the same and any significant differences.

The headlines are:

➢ The top two segments visiting in the last 2 years are Traditionals and Functionals.
➢ Cosmopolitans and High Streets say they have visited but less recently.
➢ Traditionals, Functionals, Cosmopolitans and High Streets are most likely to express an interest in visiting Lincolnshire.

➢ The number of Functionals visiting in 2016 is higher than in 2009. This may be to visit specifics events which is a popular type of break for this group.
➢ The number of traditionals visiting has decreased.

➢ Functionals and Traditionals take more short breaks or longer holidays than day trips.
➢ Cosmopolitans and High Streets take a roughly equal number of staying and day trips to the county.

➢ Functionals are more likely to have visited for a specific event.

➢ Traditionals show the strongest interest in visiting attractions, and family and historical attractions in particular.
➢ Countryside walking and enjoying the outdoors is more popular than average with Functionals.

➢ Lincoln and Skegness are the top two destinations for all four top segments.

Arkenford has also produced updated and fuller portraits of the main segments visiting Greater Lincolnshire. These portraits highlight where large proportions of each segment can be found, demographics, leisure preferences and motivations, media preferences, internet use and social media use. They are provided with this report.

The visitor experience and visitor satisfaction

Measuring and evaluating the experience of visitors to a destination and how satisfied they are is often done through a visitor survey. Visitor surveys are usually more detailed than other kinds of research and are used to find out what aspects of a visit are performing well and where improvements could be made. Visitors are asked face-to-face and/or online to provide satisfaction ratings for a range of facilities and services that they have used as well as give an overall score of the quality of the product and the quality of their experience.

1. Local intelligence

Lincolnshire has not conducted a whole area visitor survey for some time. Individual destinations, local authority areas, and clusters of product have looked at the visitor experience in isolation. Five reports produced since 2014 have looked specifically at visitor experience and satisfaction or contain results within a wider report:

➢ A 2014 report into visitor satisfaction in Skegness
➢ Lincolnshire County Council's survey of 6 of its heritage properties 2015-16
➢ Lincoln Cathedral TripAdvisor Report 2015
➢ North Kesteven's evaluation of three of their attractions in 2015
➢ Lincoln's 2014 visitor survey which also covered West Lindsey DC and North Kesteven DC.

There may be additional reports in some of the larger businesses but they were not provided for this review.

Taken together it is possible to gain a general sense of the visitor experience to Lincolnshire from these reports.

➢ **Customer service** is generally rated highly. For example in the Lincoln report 50% of visitors rate the level of customer service as excellent and it is rated highly in the Skegness visitor survey, the Lincoln Cathedral TripAdvisor report and the North Kesteven attractions reports.
➢ **Services and facilities**, such as catering, toilets and car parks, are generally rated lower than other aspects of a visit. In the County Heritage report they have the lowest rating as they do in the Skegness Visitor Survey and the North Kesteven attractions reports.
➢ The rating of the **quality of product** differs. It is rated highly in Lincoln, County Heritage and in North Kesteven reports but lower in Skegness.
➢ **Quality of experience** is consistently rated highly with 38% rating it exceptional in the Lincoln report and positive scores the North Kesteven and the County Heritage reports.
➢ **Public realm** is rated in two reports, Skegness and North Kesteven attractions report, and is rated lower than other aspects of a visit.

> **Value for money** has generally good scores though there are some differences, with a good rating in the County Heritage report, a high score in Skegness but a mixed picture for the Lincoln Cathedral TripAdvisor report and North Kesteven's attractions report with some visitors giving this category an average score.

2. National intelligence

Further insight into the quality of the product and the quality of the visitor experience can be gleaned from review and bookings sites that use visitor reviews to provide scores for individual businesses. For example, calculating the percentage of businesses that have a Trip Advisor certificate of excellence, a rating of 4 or 5 stars (highest rating 5 stars) on Expedia or 9 or more out of 10 on Booking.com can provide a general sense of quality and satisfaction. VisitEngland's quality schemes for accommodation and visitor attractions, which involve an inspection from an experienced assessor that involves looking at key satisfaction elements such as customer service, provide another layer of information.

Accommodation satisfaction and quality

Booking.com all accommodation providers   38% score 9 or more out of 10
Expedia serviced accommodation   24% have a 4 star or above rating
Expedia non-serviced accommodation   18% have a 4 star or above rating
TripAdvisor holiday cottages   42% are rated excellent
Visit England star rating   47% have a 4 star rating or above

There is a strong correlation between visitor-generated ratings on Booking.com and TripAdvisor and the quality of accommodation as judged by VisitEngland assessors. The percentage of properties rated highly by visitors on Expedia is lower. VisitEngland's assessment scheme currently inspects 146 accommodation providers.

Visitor attraction satisfaction and quality

TripAdvisor sights, landmarks, museums   32% have certificates of excellence
TripAdvisor zoos, aquariums   40% have certificates of excellence
TripAdvisor nature and parks   32% have certificates of excellence
TripAdvisor fun and games including   15% have certificates of excellence
   water and amusement parks

Under VisitEngland's assessment scheme, twenty six of the county's visitor attractions are assessed regularly and thirteen have been assessed in 2016. They are spread across Lincolnshire (NB: the threshold to gain accreditation under VQAS is 60% across all categories that are measured. The threshold to be considered excellent is 90%).

Category	England average %	Lincolnshire average %
Prearrival	76	70

Arrival	76	74
Attraction	80	80
Cleanliness	82	78
Toilets	75	72
Catering	77	76
Retail	80	75
Staff	85	83

Shopping quality and satisfaction

Venuescore looks at a range of measures to assess the health of shopping areas and shopping centres. In 2015 it placed Lincoln in the top 50 shopping destinations nationally. This is an improvement from 77th place in 2013/14. Grimsby and Scunthorpe are outside the top 100 nationally and Skegness, Boston, Louth and Cleethorpes are all outside the top 250.

Slide 7 in Arkenford's report shows that shopping is a popular activity for visitors to Lincolnshire, as it is for all destinations. The high ratings given by this same report on visitor experience indicates that trips are rated positively. Additionally shopping is positively mentioned in the Lincoln Cathedral TripAdvisor report.

Food and drink quality

There is plenty of information available to get a sense of the quality of the food and drink offer in Lincolnshire but it is more difficult to get a sense of visitor satisfaction levels. This may be because the county's pubs, cafes and restaurants are as likely to be patronised by residents as visitors and residents. Ratings on customer review sites do not distinguish between the two groups.

There are many organisations and publications that evaluate the quality of restaurants, pubs and produce across the UK. Lincolnshire has an adequate number of entries in the following:
  ➢ Great Taste Awards 2016 – 25 products, x1 three star, x6 two-star.
  ➢ AA restaurant and pub guide - 39 restaurants and pubs
  ➢ The Good Pub Guide - 110 pubs

There are no Lincolnshire pubs in the Top 50 gastro pubs for 2016 as judged by the Morning Advertising (industry trade publication sponsored scheme) or nominations in the Visit England's Great Taste Awards in the last three years. The county has no Michelin starred restaurants for 2017 and no pub makes the national top 10 in The Good Pub Guide.

The county has its own food quality scheme, Select Lincolnshire, which has worked for many years to raise the quality of food and drink in the county. It is broadly visitor facing including accommodation providers that serve food as well as restaurants and other outlets. It may not provide a complete picture of the county's food offer because it is a membership

scheme, but it does give a pretty good indication of quality. In 2016 38 restaurants, 88 accommodation providers that serve food and 13 farm shops secured a Select Lincolnshire quality mark.

Destination satisfaction

Visit England's intelligence about satisfaction with destinations is constrained by limited local data to input into its systems destination and local authority level. Their Destination Intelligence System has data for Lincoln only while their TRIM index includes two Lincolnshire destinations, Lincoln and Skegness.

The four measures used in VisitEngland's TRIM index of visitor satisfaction are:
 - the likelihood of visitors to definitely recommend a destination to family and friends
 - whether visitors will definitely or probably return in the next few years
 - the rating of the destination as much better or slightly better than others they have visited
 - the overall rating of the destination.

TRIM scores for Lincoln and Skegness 2014

England average	Lincoln	Skegness
94	80	91

TRIM competitive set for Skegness 2014

Skegness	Scarborough	Great Yarmouth
91	95	90

TRIM competitive set for Lincoln 2014

Lincoln	Durham	York
80	95	104

The score of 91 puts Skegness put the resort into the middle rank of destinations nationally. The score of 80 for Lincoln puts it in the lower rank of destinations nationally. However creating a small competitive set from other English destinations of a similar type shows that both destinations have a lower TRIM rating when compared with similar destinations outside Greater Lincolnshire. The highest ranked destination in England has a TRIM score or 111 and the lowest a score of 74.

Using VisitEngland's Destination Intelligence System it is possible to look in more detail at Lincoln's performance and compare it with the average performance for English destinations in 2013.

	Lincoln	England
Likely to recommend to family and friends	75	86
Likelihood of returning	56	77
Rating against other destinations	49	65
Overall satisfaction	71	85

Visitor Experience Summary

Using national data drawn from online review sites and inspection based schemes it is possible to say that Lincolnshire performs at or just below the national average in terms of visitor experience. On review and booking sites, of the businesses that have a rating around a quarter and a third of businesses achieve the highest ratings possible.

It is also possible to see that visitor-oriented attractions such as sights and landmarks and museums are rated more highly by visitors than those that are likely to be used regularly by local people. This may be because visitors are more likely to use rating sites to score their short breaks and holidays and to have a positive view of these experiences than are local people using what they regard as local facilities and services.

While it is possible to use review sites, publications and national studies to assess the quality of the product for food and drink, shopping and public realm using it is more difficult to measure visitor satisfaction. These aspects of the visitor experience are best evaluated through dedicated visitor surveys.

The overall visitor experience is rated more highly in local studies than national studies. Customer service, the quality of the product and the quality of the experience all get high scores from a good percentage of people in Arkenford's report: over half said that their trip exceeded their expectations and over half said that they would recommend Lincolnshire as a destination with just 6% say they wouldn't recommend the destination. The TRIM index gives a lower score for recommendation and overall satisfaction.

There is a general lack of information about visitor satisfaction with Lincolnshire's countryside. The Greater Lincolnshire Nature Partnership has produced a comprehensive study about nature tourism but it doesn't reflect either the experience or the satisfaction levels with this important product for the county.

There is a general lack of information about how satisfied visitors are about the range and quality of information on offer both pre and post arrival.

Intelligence about visitor satisfaction in North Lincolnshire, North East Lincolnshire and the southern part of the county either does not exist or was not available for this review.

Whether or not reports covering these areas would produce significantly different results from the rest of the county is questionable. Given that some of the product is broadly similar – Cleethorpes and Skegness for example are both seaside resorts with piers - it is fair to assume that the results have some relevance to areas not covered by recent reports. However some of the larger towns, such as Grimsby, Scunthorpe and Grantham are unlikely to be able to draw comparison with Lincoln due to the differences in their product offer.

Intelligence gaps

There is a considerable amount of information about visitors to Lincolnshire that is gathered regularly. The main annual reports have been noted here and a list of studies that are produced regularly or have been produced as one-offs in the last 5 years is provided in the appendices. The main gaps are:

The visitor experience in specific destinations in Lincolnshire. There is more information about Lincoln and Skegness than other destinations and very little about some of the other main centres. Slide 32 of Arkenford's report provides the top 10 list of destinations for each of the top four visiting segments that could be the focus of further research.

The visitor experience in countryside areas. Given the rural nature of much of the county and that walking in the countryside is a popular activity for one of the main segments, Functionals, it would be useful to know more about the countryside offer and how it does or doesn't meet the needs of visitors to the county. The Greater Lincolnshire Nature Partnership's 2016 report into nature tourism is comprehensive in most respects but doesn't cover the visitor experience. It would be helpful to have more information about the broader countryside offer and specifically the visitor experience and satisfaction levels.

Business visitors to the county. Arkenford's report shows that each of the top four segments contain a small percentage of visitors coming to Lincolnshire for business reasons but little is known about them. The absence of more detailed reports covering the main towns in the county including Grimsby, Scunthorpe and Grantham is probably the main reason that less is know about business visitors, though the strength of the agri-food sector may mean that business visitors are spread across the county. It will be important to evaluate the business tourism offer alongside the needs and expectations of business visitors. Without the foundations of a suitable product this may not be an opportunity for the county.

Who isn't visiting the county. There is some information about Ark Leisure segments that aren't visiting Lincolnshire in significant numbers and there is an opportunity to grow all four of the top visiting segments. Attracting Discoverers may be an opportunity for the county given that it already appeals to the more independently minded groups. More information about barriers to visiting and the kinds of product offer and marketing messages that would convince more to visit would be helpful.

Recommendations

1. It is important that the annual economic impact assessment continues. This provides the basic volume and value information needed to quantify the importance of the visitor economy in Lincolnshire. Without it it would be difficult to make the case for investment in the sector or feed visitor economy requirements into broader economic development activity.

2. The detailed volume and value trends report produced in 2016 contains a lot of rich information that can be used by businesses, destination organisations and local authorities and if possible should be repeated at suitable intervals.

3. The annual volume and value should be presented and disseminated widely each year with the trends reports added into the communication exercise as appropriate.

4. Arkenford's updated segmentation report should be looked at in a collaborative setting – workshop, seminar – to share information about the target segments and sort out which organisations in the county are targeting the different segments and how. This will foster partnership working across geographies in line with the main thematic product offer eg the coast, the countryside, heritage, aviation.

5. An annual plan of research activity should be produced. This will help avoid duplication and support partnership working. For example there are similarities between Lincolnshire County Council's Heritage monitoring and North Kesteven's assessment of three of their heritage attractions. The aim should be that activity can be coordinated and timed for best results and that people can collaborate to achieve better intelligence and economies of scale, across geographies and in line with the main thematic product offer eg aviation, coastal, countryside, heritage.

6. Further work should be done to understand the similarities and differences between Greater Lincolnshire's visitor segments and its arts and cultural audiences. Currently there is little connectivity between the two. Understanding where they overlap could be beneficial to both the visitor economy and the cultural sector and in particular those investing in and managing events.

7. Consideration should be given to the intelligence gaps and decisions made on which to fill and in which order. If it is not possible to conduct resource-hungry whole-areas studies, such as a Greater Lincolnshire visitor survey, other ways of building the intelligence for Greater Lincolnshire should be considered. It may be possible, for example, for locally delivered surveys to include an agreed set of questions that produce intelligence about visitors to the whole area. Questions about the visitor experience relating to food and drink, public realm and shopping should be included if this approach is adopted.

information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance.

Appendices

1. Information sources

Over 50 reports, documents and databases were supplied for this review by the following organisations:

Butlins Skegness

East Lindsey DC

Greater Lincolnshire Nature Partnership

International Bomber Command

Lincolnshire Agricultural Society

Lincolnshire Aviation Heritage Centre

Lincoln Castle

Lincoln Cathedral

Lincoln City Council

Lincolnshire CC – Heritage Service,
   Tourism Team

North Kesteven DC

North Lincolnshire Council

Select Lincolnshire

South Kesteven DC

Springfields

Visit Lincoln

Visitlincolnshire.com

Reports considered in detail

Arkenford Visitor Profiling Report Lincolnshire 2009

Great Magna Carta Evaluation 2015

LCC Heritage Visitor Survey report full year 2016-16

Lincolnshire STEAM Report 2009-2015

Lincoln Branding Survey

Lincoln Castle report 2015

Lincoln Cathedral TripAdvisor report

Lincoln Christmas Market Economic Impact Assessment

Lincoln Destination Performance survey 2014

North Kesteven Destination Performance survey 2014

North Kesteven visitor satisfaction (reports for 3 attractions)

VisitEngland Destination Report – Skegness 2014

West Lindsey Destination Performance survey 2014

Consumer contact and postcode databases used for visitor surveys and postcode analysis

Butlins Skegness postcode database 2016

East Lindsey DC consumer database

Good Taste postcode database

International Bomber Command consumer database

International Bomber Command event postcode database

North Kesteven DC postcode database

North Lincolnshire website requests database

North Lincolnshire postcode database

Springfields VIP postcode database 2016

Lincoln city guide requesters postcode database

Visit Lincoln consumer contact database

VisitLincolnshire.com consumer contact database

Other information sources

AA Good Pub Guide
Booking.com
Expedia.com
The Good Food Guide
The Good Pub Guide
The Guild of Fine Food – Great Taste
Michelin Guide
Morning Advertiser (trade publication)
TripAdvisor.com
Understanding Visitor Satisfaction 2013-14, VisitEngland
Venuescore
VisitEngland Accommodation ratings
VisitEngland Excellence Awards
VisitEngland Destination Intelligence System
VAQAS assessments 2016