



Perception research of Essex and its tourism offer

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Background

- Year of culture
- Image of Essex
- General understanding
- Aims and objectives

Methodology

- Sample size
- Timings
- Method
- Geographical areas
- People that take days out or short breaks

Key findings

- 64% took a rural short break, (54% city break, 20% shopping break)
- 17% had been to Essex on a short break
- Rural destinations were less known than the coastal and town locations (Southend and Colchester most recognisable)

Key Findings

Open question- what characteristics do you associate with Essex?

- Countryside 34% (2008), 28% (2009)
- Rural 7%
- Villages 10% (2008), 6% (2009)

Key Findings

To what extent do people think Essex has beautiful countryside?

| | Very much | Quite a lot | A little | Not much | Not at all |
|------------------------------|------------|-------------|------------|------------|------------|
| Essex girls | 28% | 28% | 22% | 13% | 9% |
| Chavs | 24% | 27% | 25% | 14% | 9% |
| seaside | 18% | 39% | 27% | 11% | 6% |
| Beautiful villages | 15% | 33% | 30% | 17% | 5% |
| Beautiful countryside | 13% | 33% | 31% | 18% | 4% |
| Being flat | 8% | 24% | 37% | 19% | 11% |
| Diverse | 7% | 24% | 35% | 27% | 7% |

Key findings

Essex is much better than:

- Liverpool
- Hertfordshire

The same as:

- Shropshire
- Suffolk

Much worse than:

- London
- Devon
- Norfolk

Key Findings

- 12% recognised the Festival of the countryside guide
- 13% recognised the visitor guide
- 15% have recognised the website

Conclusion

- Lack of awareness (in particular of the products)
- Essex girls image and Romford still in peoples minds – perceptions are embedded.
- People living here have the most positive image and those that have never visited have the most negative.
- Awareness had decreased over the year of rural locations
- **BUT MORE PEOPLE WANT TO VISIT!**

Why did the perception change?

- Competition from other destinations with greater resource
- Other destinations promoting rural areas
- Different sample of people

What next?

- Raise the awareness of rural locations
- Use town and coastal destinations as the hook
- Word of mouth campaigns
- Take the opportunity to promote something that is new to the consumer.
- Image of Essex work

Other research

- Festival of countryside requests
- Volume and value research
- 2007 Visitor guide 61% visiting for countryside (72% coast, 65% heritage)

Economic Downturn

- Visitor attraction numbers
- Tourism robust against economic downturn
- VB research

Economic Downturn

- Stansted greater inbound, decrease in outbound
- Holidays are a necessity (only 45% cutting back on holidays)
- Day trips and UK short breaks less likely to be affected
- Some markets affected more than others

Change in behaviours

- Short breaks taken at home
- Spending longer to look for good deals
- Spending less time at destination
- Time of year
- Frequency of trips
- Cost of getting there (fuel prices)
- Booking earlier or last minute

What we can do to assist

- Promote to London market (cheap to access)
- Work with Stansted and ports to maximise European market
- Give value added or upgrades rather than discounts
- Loyalty schemes
- Package with train operators
- Remove guilt
- Keep marketing

visitessex.com



Questions?