



Market Research Report

For Exeter City Council –
November 2016

To: Victoria Hatfield – Economy and Enterprise Manager
From: Sarah Ingram – Lead Consultant
Date: 14.11.16

Research Aims and Objectives

- The key focus of the research is to inform on the development of the Visit Exeter brand:
 - To understand what those taking day trips* or short breaks in the UK (South West) look for when considering a destination
 - Establish what key features respondents associate with Exeter
 - To identify the key words respondents would use to describe Exeter
 - To test a number of descriptive statements about Exeter and the level of agreement with them
 - To understand any differences between those that have visited Exeter and those that have not
 - To test the propensity of respondents to consider Exeter when thinking about taking a break in the UK.

*including those taken as part of an annual holiday. It is recognised that it is unlikely that the majority of visitors to Exeter come to Exeter as their main annual “summer” holiday. It is far more likely to be considered as a day trip, weekend break destination.

Research Methodology

- An online survey was developed and the link sent to 2 key audiences:
 - Online panel managed by a leading panel provider targeting:
 - 18+ adults living in: South West, London and South East, West Midlands (those areas that traditionally a large number of visitors to the South West live in)
 - Additionally we used a screening question at the start to rule out those who would state they have never been to or heard of Exeter
 - Using this methodology we obtained 1,128 complete responses
 - Additionally, Exeter City Council sent the survey to the Visit Devon database of around 2,000-3,000 people.
 - Using this methodology we obtained a further 153 complete responses.
- Overall 1,281 complete responses were obtained giving statistical reliability at the 95% confidence level +/- 3%.
- The fire at the Royal Clarence occurred during the fieldwork period so there was a heightened level of publicity about the City – nationally as well as locally.

About the report

- This report has been designed to highlight key findings from the surveys. Reporting has been carried out at an holistic level combining the results from both surveys.
- Where the responses from the Visit Devon database differ from the panel respondents, these have been highlighted.
- Where open-ended questions have been asked, verbatims have been selected to give an overview of the type and range of comments received.
- Percentages may not always add up to exactly 100% due to rounding.
- The sample size for each question varies as not all respondents answered all the questions.

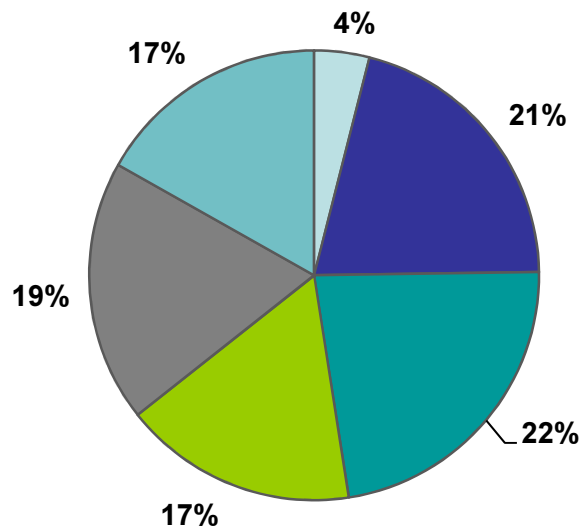


Who responded?

Classification – Age and Gender

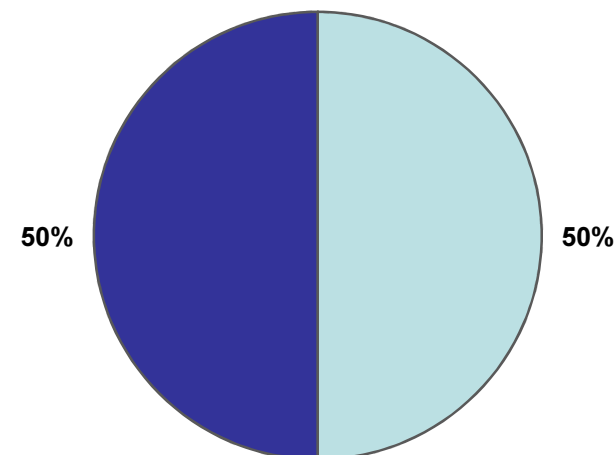
The survey achieved a good spread of ages and genders. The Visit Devon respondents were more likely to be older (45+) and female.

Age group



16-24 25-34 35-44 45-54 55-64 65 +

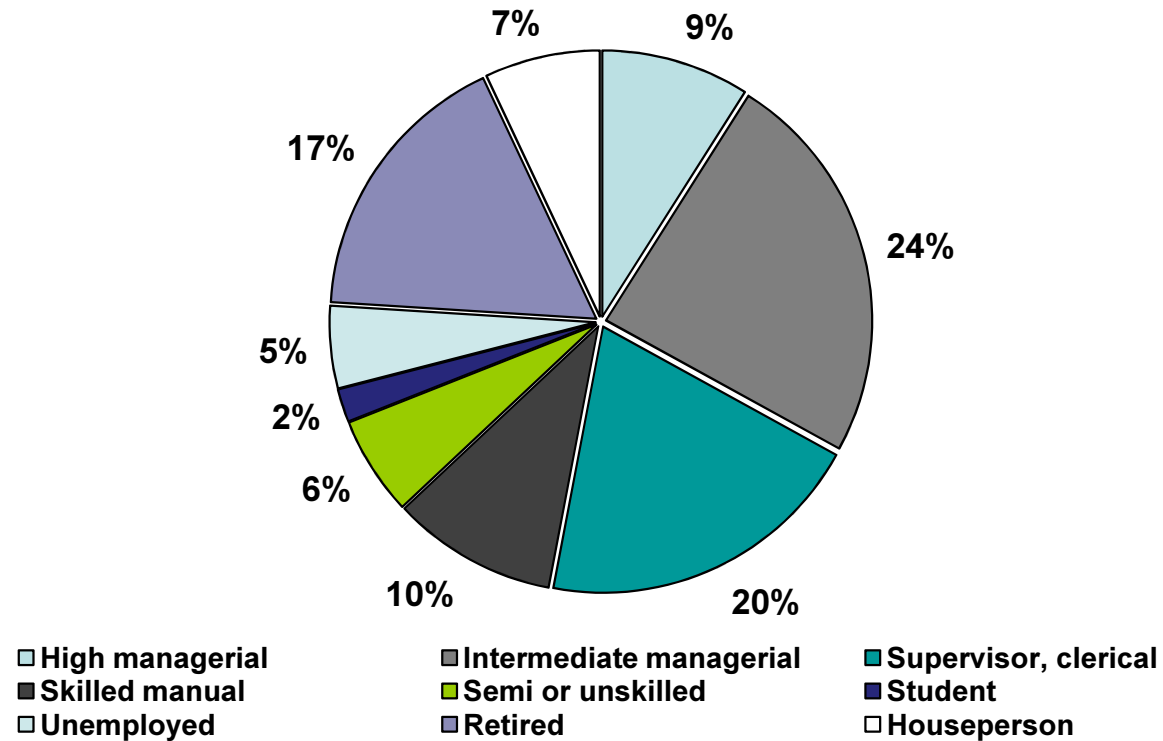
Gender



Male Female

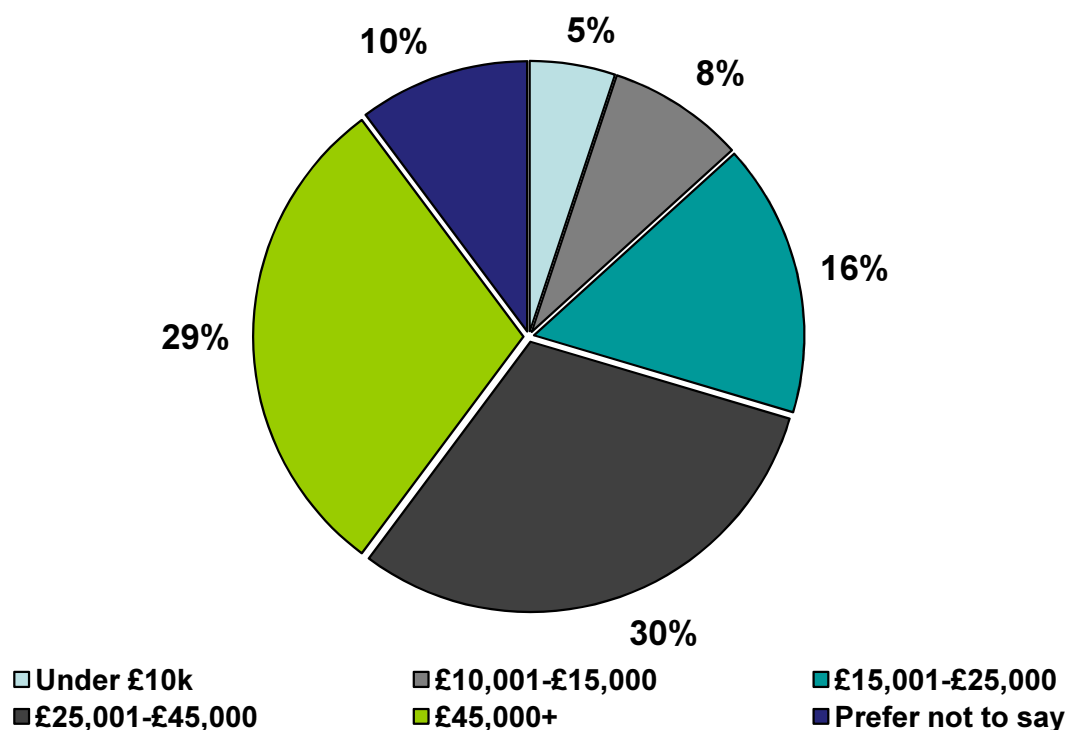
Employment type

The survey achieved a good spread of employment types with the majority being in the intermediate managerial and supervisor roles. Those on the Visit Devon database were more likely to be retired (linked to the older age profile).



What is your current annual household income?

The survey achieved a good spread of household incomes with over half of households having an annual income of £25,000+ in line with the national average. The Visit Devon respondents were more likely to tick “prefer not to say” probably due to lack of anonymity.

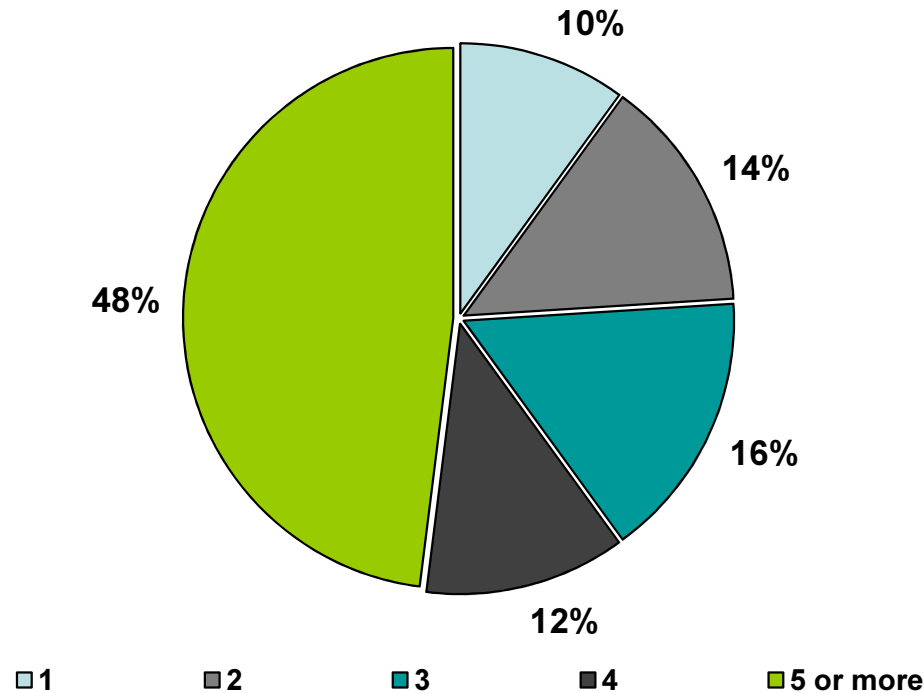




Day/overnight trips in the UK

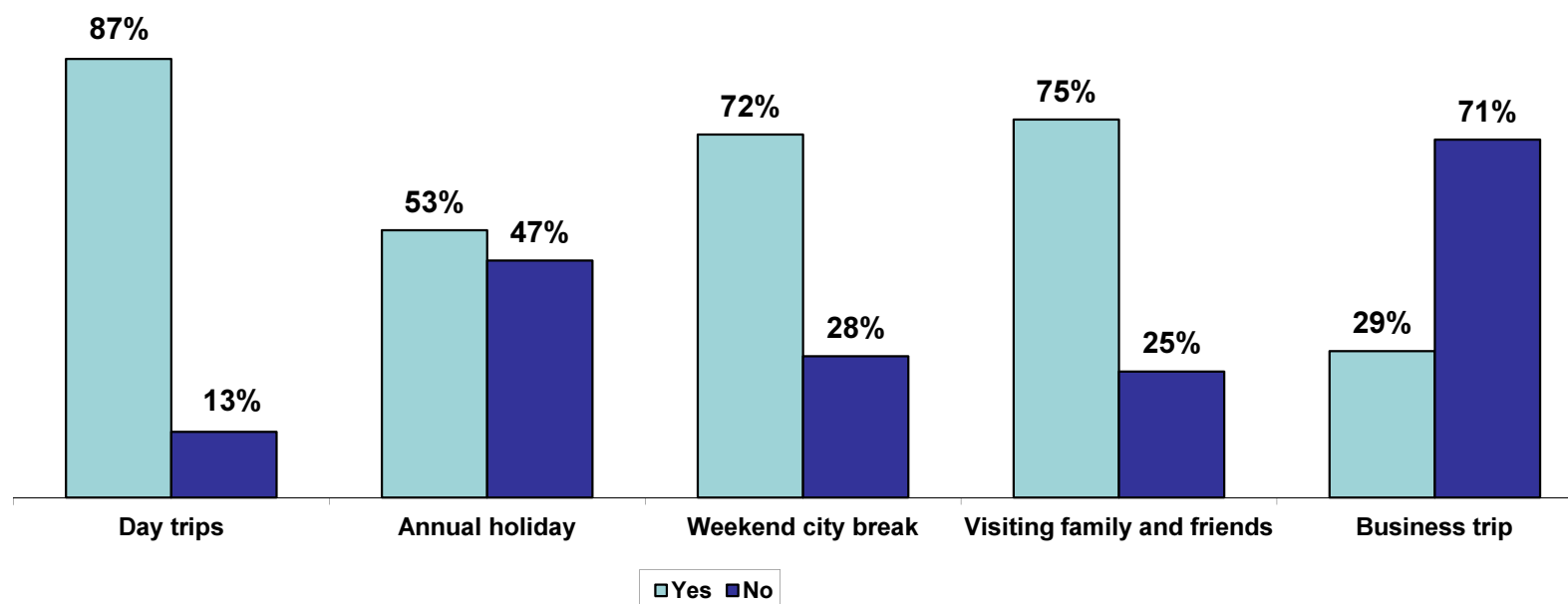
Typically how many trips (day and overnight) do you take in the UK each year?

Nearly half of the respondents take 5 or more trips in the UK each year.



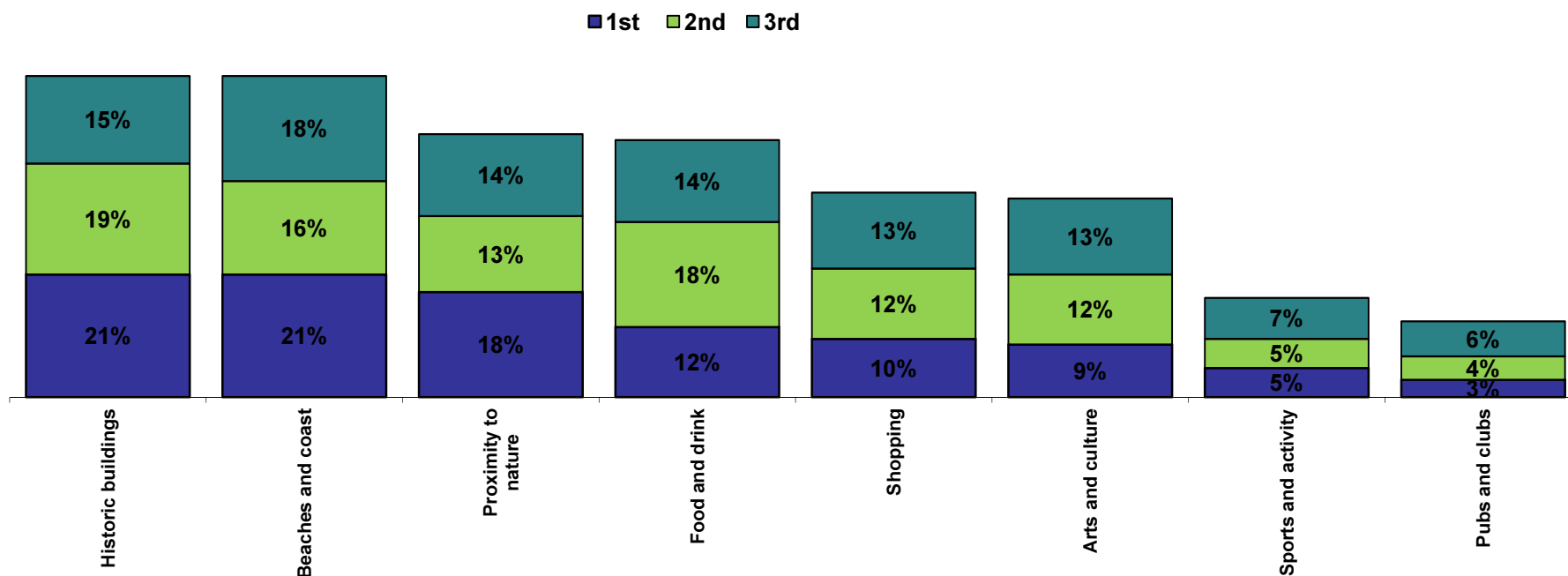
What is the main purpose of those trips?

As suspected the majority of respondents take day trips and weekend city breaks in the UK rather than their annual holiday (although those on the Visit Devon database significantly more likely to take an annual holiday in the UK). Visiting family and friends also accounts for a large number of trips.



Which are the most important features when looking for a place to visit for a day trip or short break in the UK?

The top 3 features taking all mentions into account are for historic buildings, beaches and coast and proximity to nature. Pubs and clubs would appear to feature lowest when respondents are considering a day trip or short break.

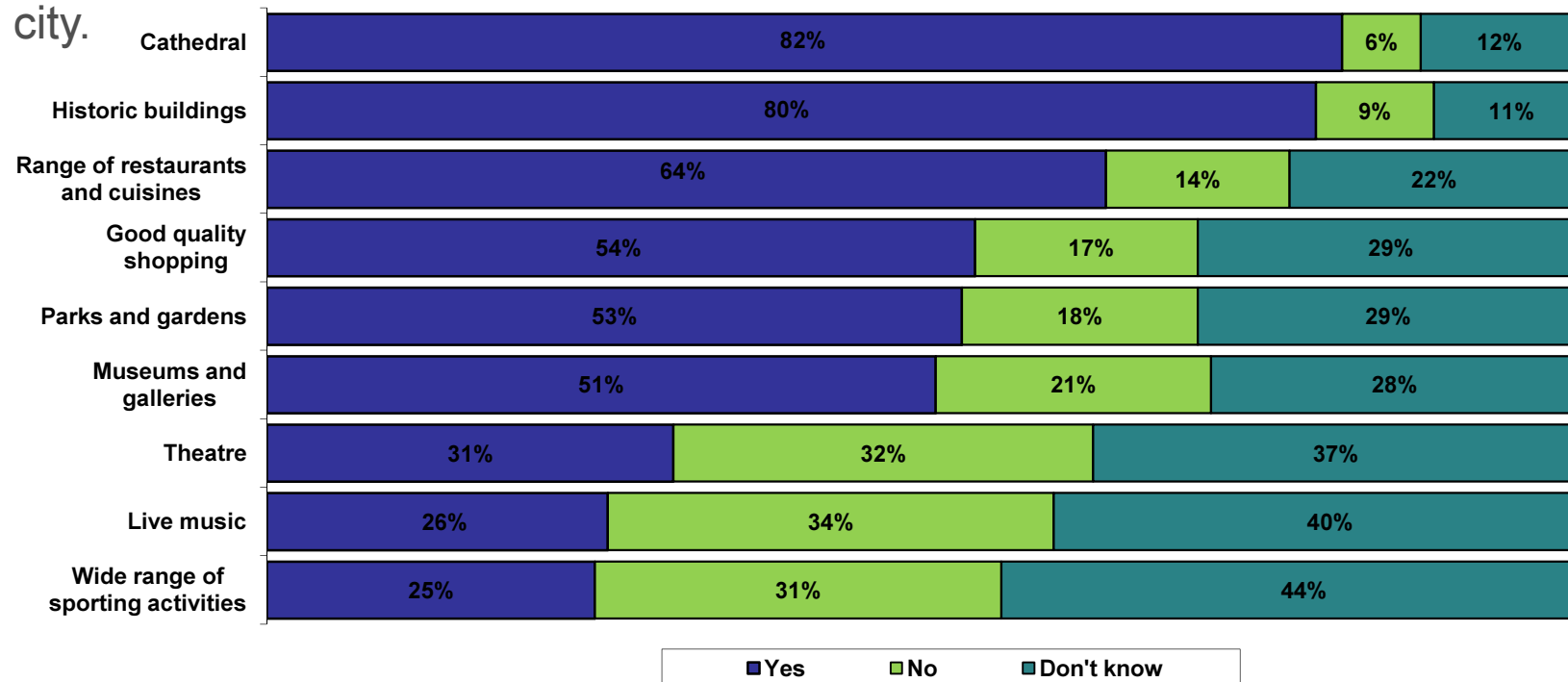




Views on Exeter

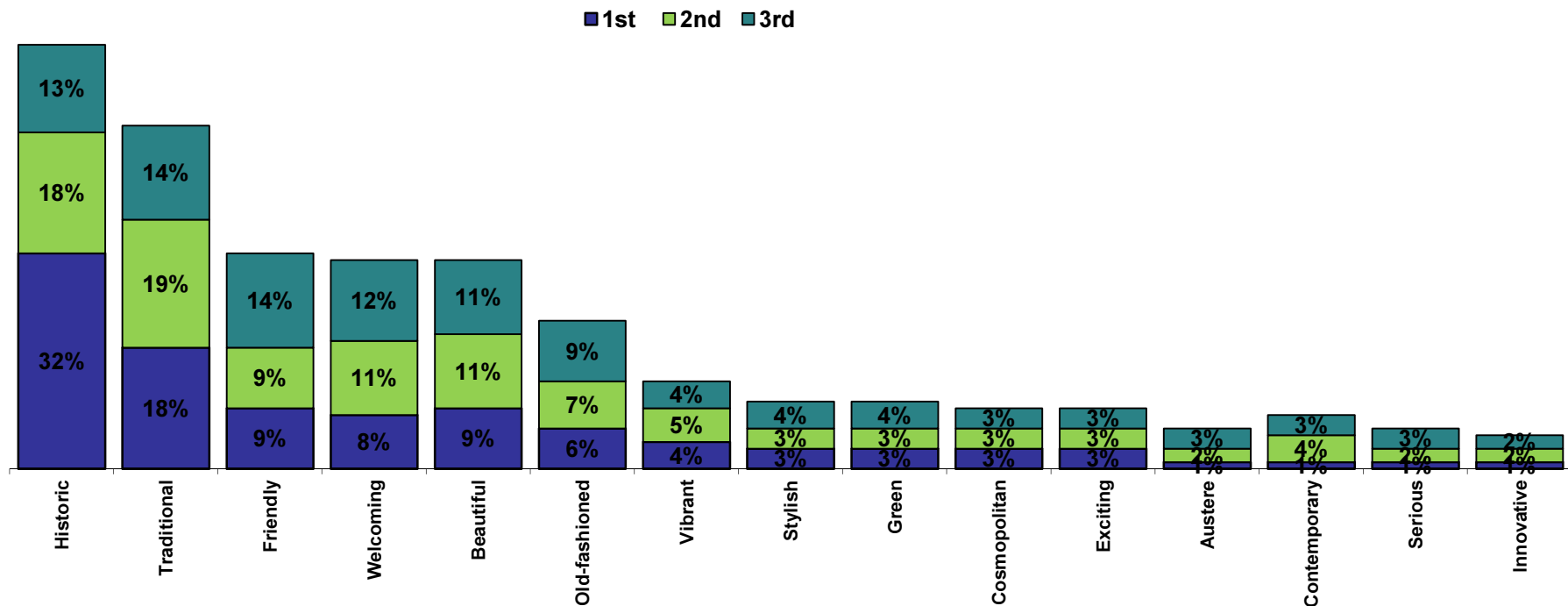
Which of the following do you associate with Exeter?

Perhaps not surprisingly, the Cathedral and historic buildings are those features most commonly associated with Exeter. The University and the coast were also mentioned. Encouragingly, given the recent developments at the Guildhall and Princesshay, restaurants and shopping also feature highly. The arts and sporting activities are the least likely to be associated with the city.



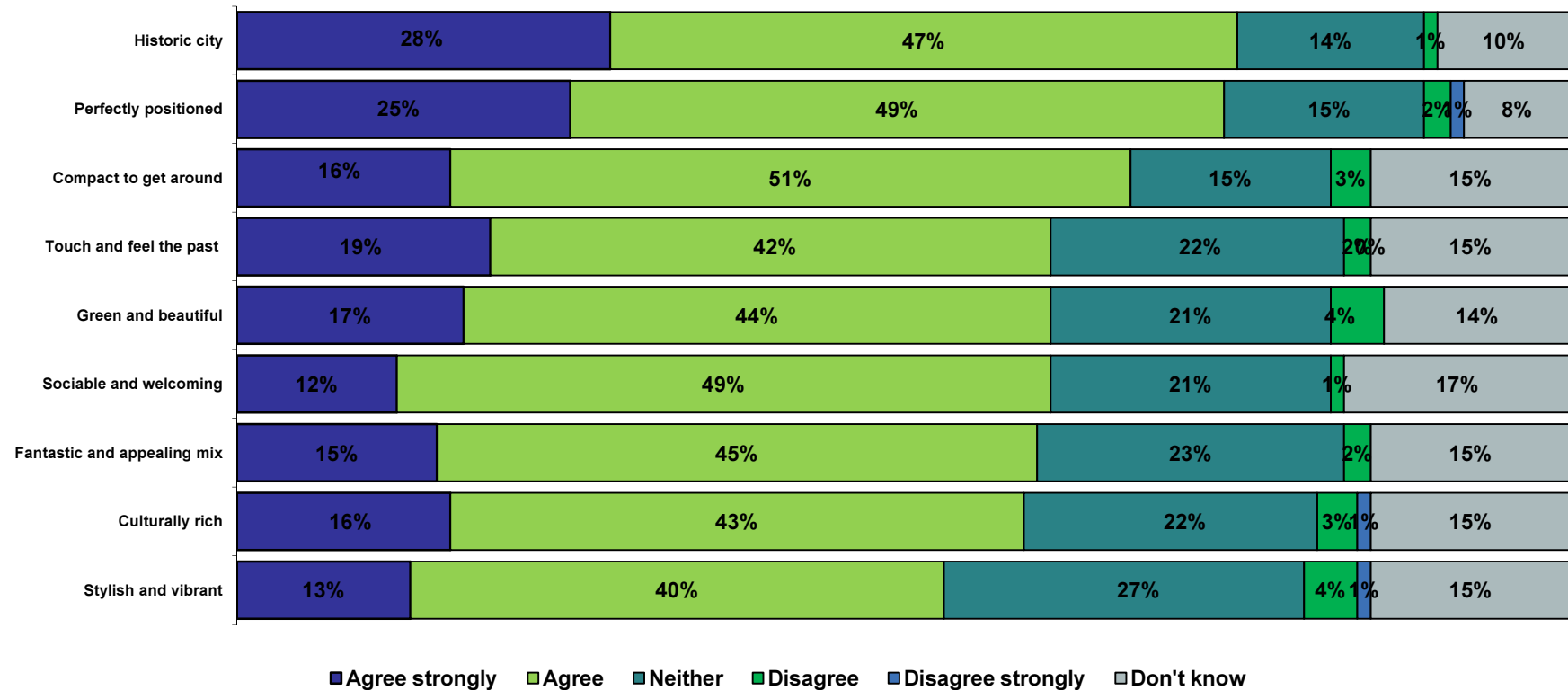
Please select the 3 words that you would use to describe Exeter

In common with the features they associate with Exeter (Cathedral/historic buildings), the top 3 words respondents would use to describe Exeter are: historic, traditional but also friendly (followed closely by welcoming). Very few would describe it as stylish, exciting, contemporary or innovative. Those on the Visit Devon database were more likely to describe it as vibrant (care very small sample size).



To what extent do you agree or disagree with the following....?

Again, statements about Exeter being an historic city filled with fascinating heritage gain the highest levels of agreement followed by its position to explore the South West and compact size. However none of these statements have very high levels of disagreement with a significant minority claiming that they “don’t know” enough to form a view.

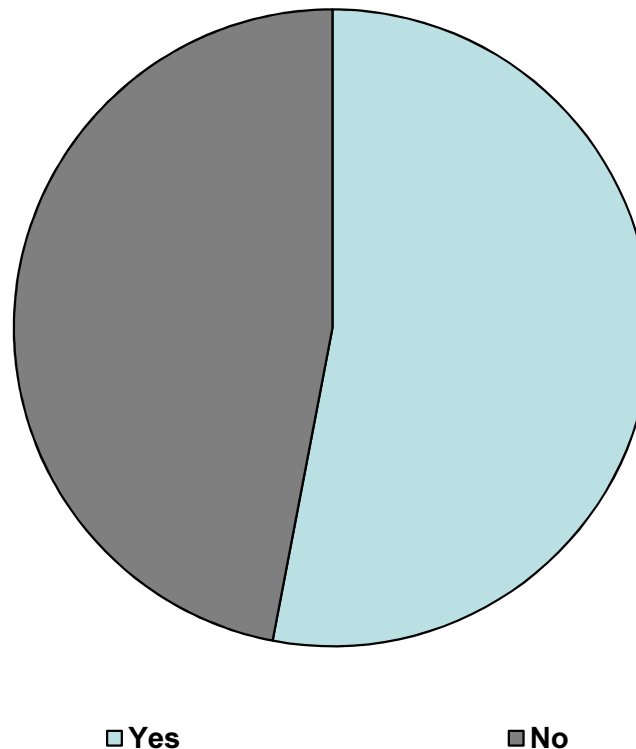




Visitors' views on Exeter

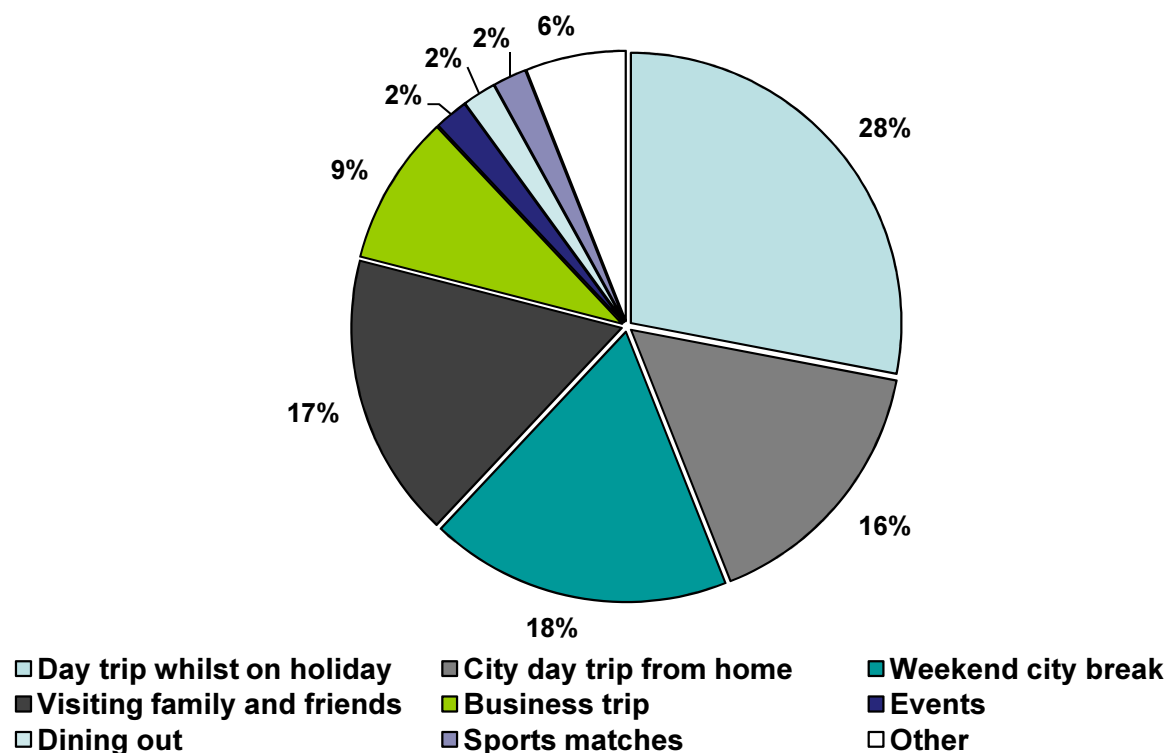
Have you visited Exeter at all for any purpose in the last 5 years?

Over half of the panel respondents had visited Exeter in the last 5 years. Nearly 7 in 10 of the respondents from the Visit Devon database had visited.



And what was the purpose of this visit?

Whilst over a quarter had visited whilst on holiday, over a 1/3rd had also visited as a day trip from home or for a weekend city break. “Other” included visiting the University, stopping over on the way to Cornwall and that they live/work here (Visit Devon database).



What do you like most about the City?

Echoing the earlier findings, those who had visited Exeter listed the following:

- Cathedral
- Historic
- Shopping
- Atmosphere
- Beautiful
- Clean
- Green
- Friendliness
- Compact
- Culture

What do you like least about the City?

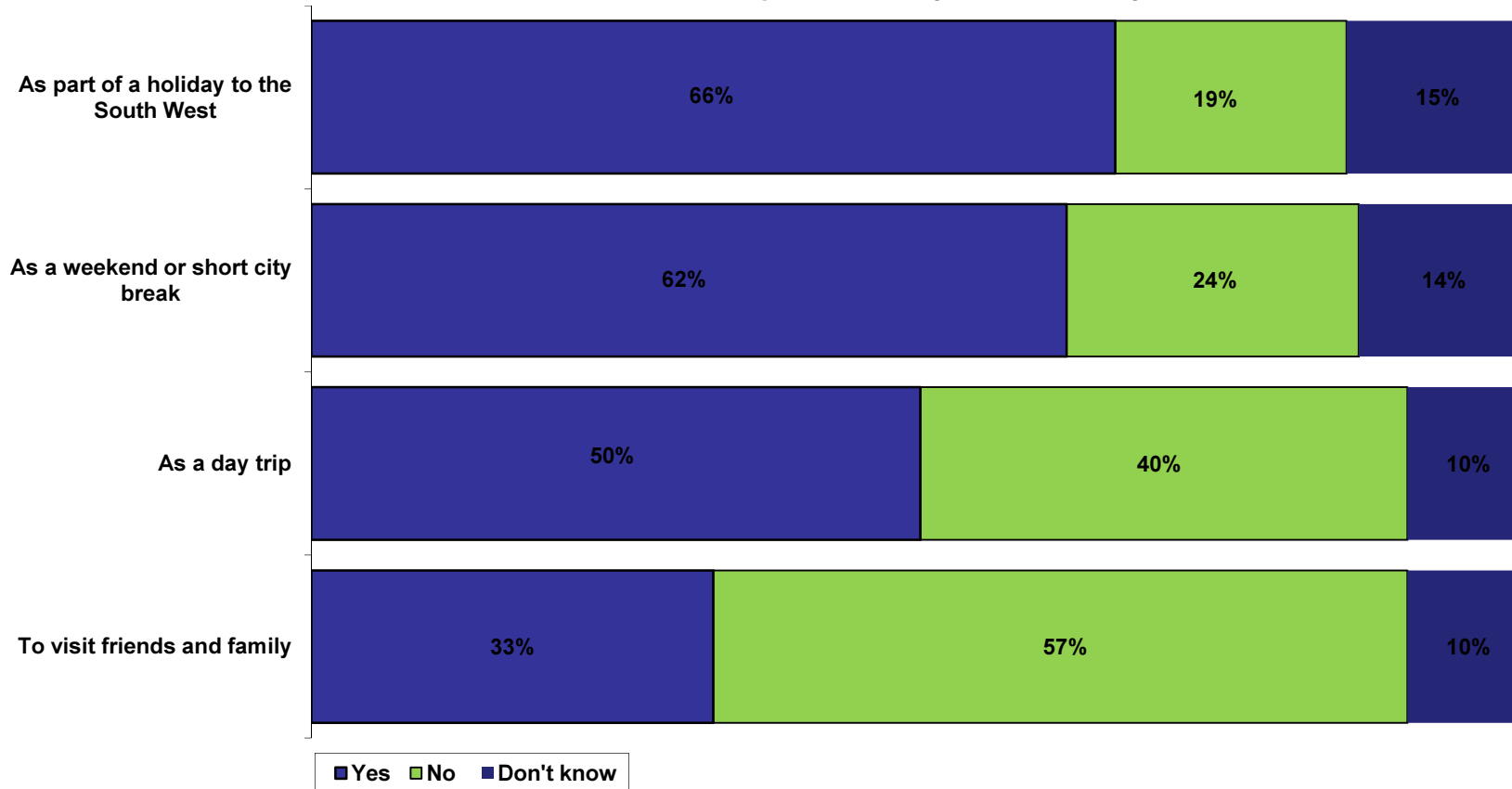
One of the major issues for those who responded was the distance to Exeter. Other issues appeared to be mainly with traffic and parking.

- Far
- Roads
- Parking
- Traffic
- Long way

A few comments from the Visit Devon database mentioned “too many chain restaurants and shops” and “homelessness and beggars” again these tended to be from the small minority who live/work in Exeter.

How likely would you be to consider Exeter?

Whilst the majority would visit Exeter as part of a holiday to the South West, a significant number would also consider if for a short break or for a day trip. Those saying “No” tended to cite the distance as a reason not to visit particularly for the day or a short break.



Summary

- Exeter appears to be mainly viewed as an historic city which is compact to get around and a good base for exploring the South West. This fits comfortably with their key requirements for historic buildings, beaches and coast and proximity to nature that the respondents look for when considering a short break in the UK.
- However, it would appear that a lack of knowledge (which can be addressed through communications) rather than a perception accounts for the lower scores for such descriptions as stylish and vibrant.
- The small minority who do agree with such statements about Exeter, tend to be those who have visited it and/or work in the City.
- There is a perception that Exeter is “too far away” for some for a day trip or a weekend break. This linked to the perceived (and experienced) barriers of traffic and parking add to the view by some that it is “difficult to get to”.
- The range of cuisines and restaurants appear to have high awareness (along with the Cathedral, historic buildings and the University) possibly indicative of the new developments at the Guildhall and at Princesshay. Cultural aspects (eg. Theatre) conversely appear to be less well known.

