# PLYMOUTH TOURISM CONFERENCE

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# PLYMOUTH AS A TOURISM DESTINATION

# METHODOLOGY

- Data was collected through an online survey on 520 people living the South, South West and South East of England, both within 90 minute drive time of Plymouth and further afield along the M4 and M5 corridors

- Respondents were members of a panel and were incentivised once completing the survey

- The fieldwork was conducted in May 2017

- Quotas were used to ensure the following:
  - Half of the respondents were local (living in Cornwall, Devon, Dorset and Somerset)
  - Half of the respondents were non-local (living in Berkshire, Bristol, Buckinghamshire, East Sussex, Gloucestershire, Greater London, Hampshire, City of London, Oxfordshire, Surrey, West Sussex and Wiltshire)

  - 7% of respondents currently live in Plymouth (either full time or some of the time)
  - 41% of respondents have visited Plymouth in the past 2 years
  - 52% of respondents would consider visiting Plymouth, but have not visited in the past 2 years




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# PLYMOUTH RATINGS

Likely to **return** in the next few years

90%

Likely to **recommend** Plymouth

90%

Rated their **overall experience** as good or better

88%

Satisfied with quality of **places to eat and drink**

81%

Satisfied with quality of **retail**

82%

Satisfied with quality of **accommodation**

83%

**76%**

rated overall **value for money good or excellent**

*an increase on 2014 (75%)*

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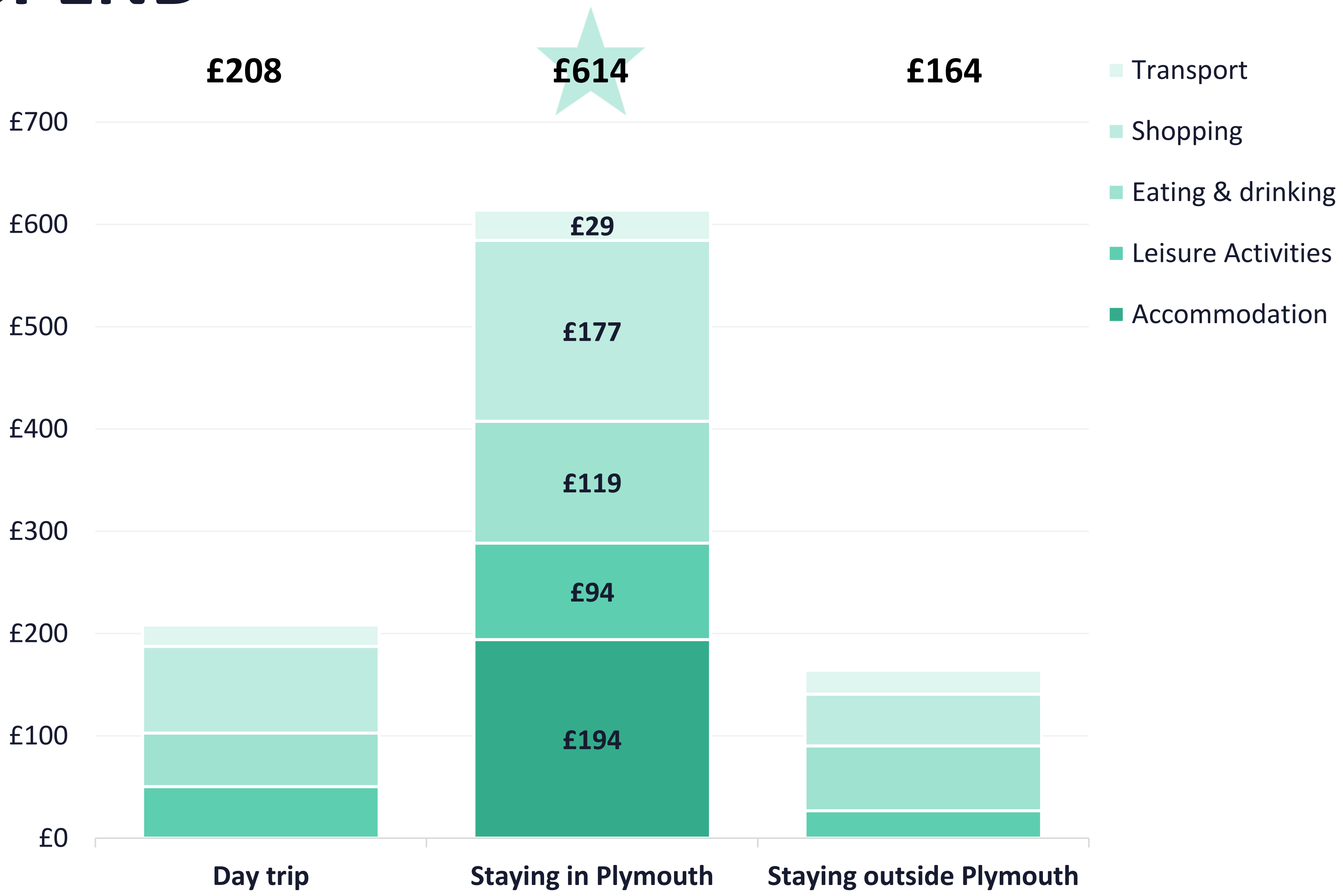
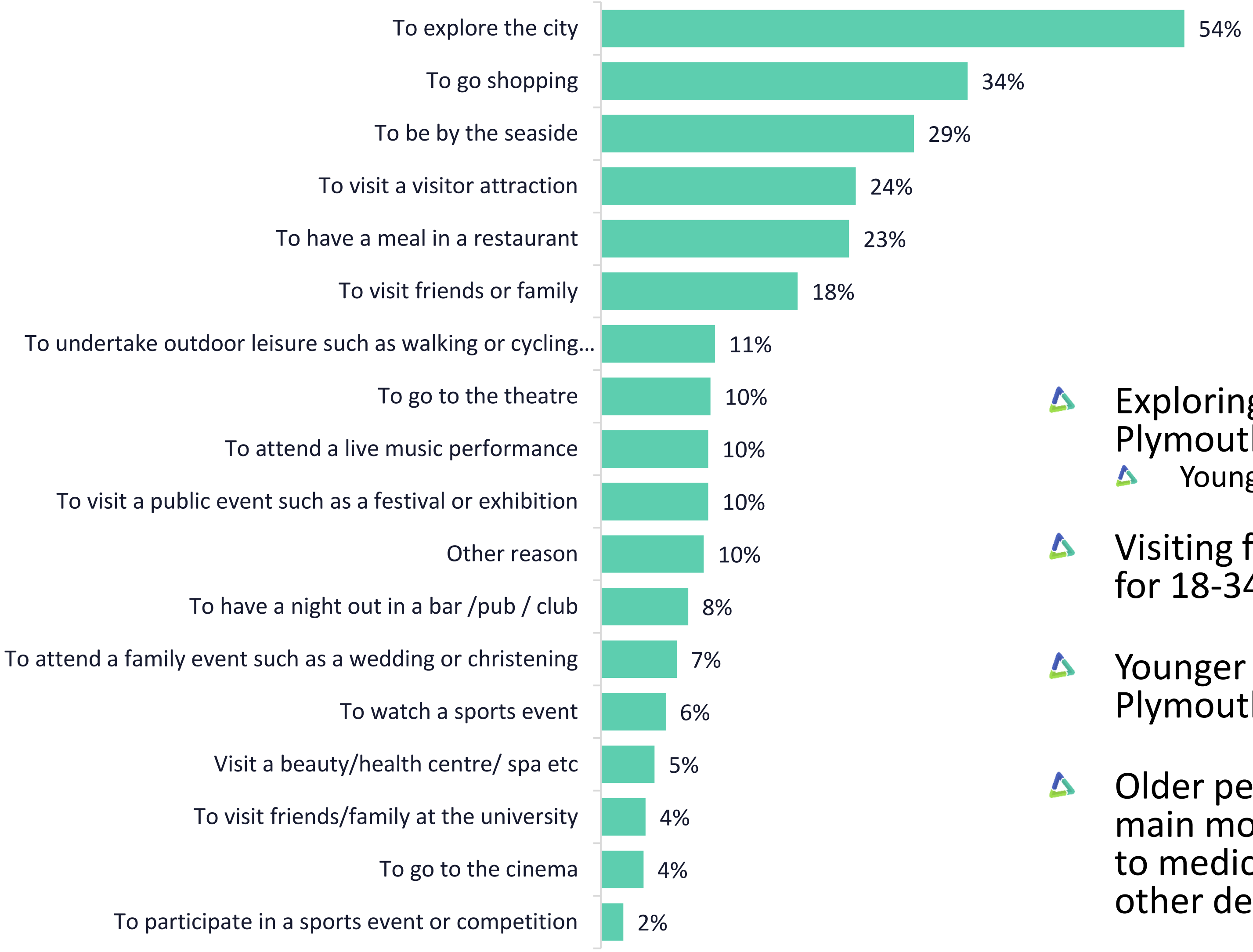
# AVERAGE SPEND



# MOTIVATIONS FOR VISIT




**54%** to explore the city

**34%** to go shopping

**29%** to be beside the seaside

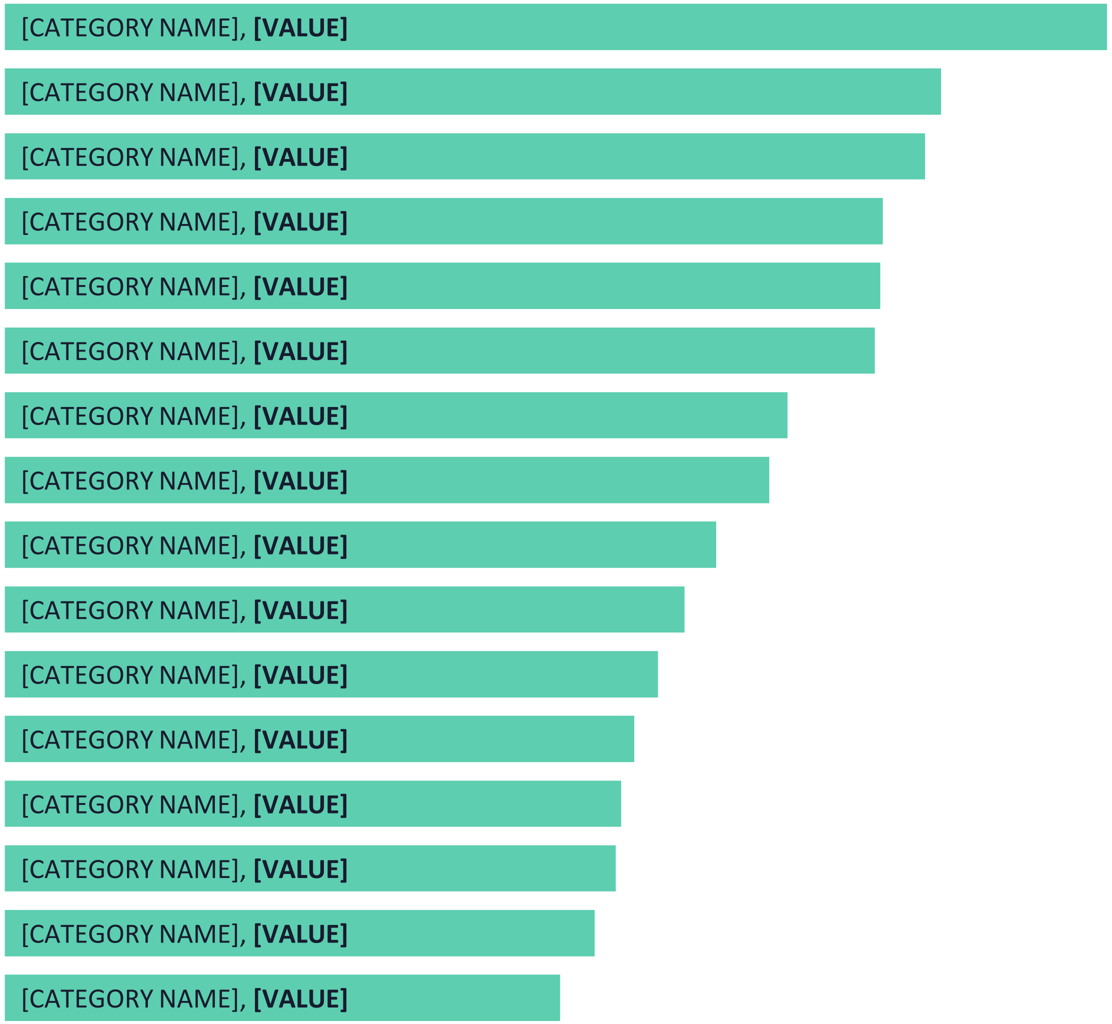
- Exploring the city is the main motivation for visiting Plymouth
  - Younger respondents were less likely to give this as a reason
- Visiting friends or family was more likely to be a motivation for 18-34 year olds visiting Plymouth
- Younger respondents were also more likely to be visiting Plymouth for a live music event
- Older people were more likely to select "other" as their main motivation and gave alternative reasons such as going to medical appointments or stopping off when travelling to other destinations



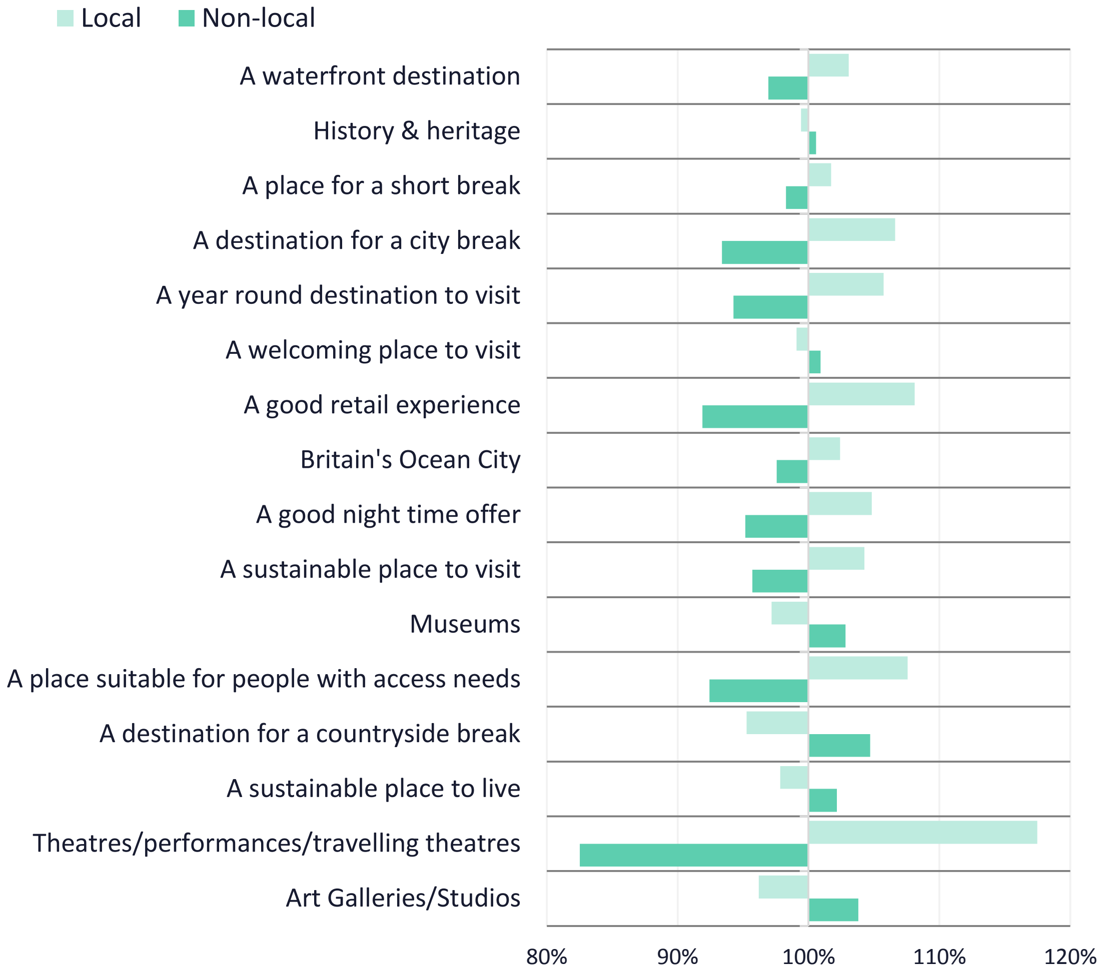
Q. Which of the following best describe your motivation for visiting Plymouth?

# ASSOCIATIONS WITH PLYMOUTH

Activities/ experiences associated with Plymouth (scoring 7+)




% associating activities/ experiences with Plymouth compared to average






Q. To what extent do you associate Plymouth with each of the following activities/ experiences?

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# HOW DOES PLYMOUTH COMPARE?

**Rating Compared to Competitors** (Bristol, Exeter, Portsmouth, Truro and Southampton)


| | 1 | 2 | 3 | 4 | 5 | 6 |
|---|---|---|---|---|---|---|
| Arts & Culture | Bristol | Exeter | Plymouth | Portsmouth | Truro | Southampton |
| History & Heritage | Plymouth | Portsmouth | Bristol | Exeter | Southampton | Truro |
| Restaurants, Pubs & Bars | Bristol | Plymouth | Exeter | Portsmouth | Southampton | Truro |
| Good Night Time Offer | Bristol | Plymouth | Exeter | Portsmouth | Southampton | Truro |
| Retail & Shopping | Bristol | Plymouth | Exeter | Southampton | Portsmouth | Truro |
| Visitor Attractions | Bristol | Plymouth | Portsmouth | Exeter | Southampton | Truro |

Q. How would you rate each of the following destinations for visitor attractions? *It does not matter if you have not visited, it is your perception we are interested in. Slider scale between 0 and 100.*



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# SUMMARY

- The overall appeal of Plymouth is strong
  - Visitors are satisfied with the majority of its offerings, especially the quality of accommodation as well as the quality and range of shops and places to eat and drink
  - They consider it to be a destination that can offer good value for money
  - Visitors are likely to rate their experience highly and will recommend Plymouth to friends and family
  - A number of aspects strongly associated with Plymouth e.g. a waterfront destination are also universally appealing
  - Plymouth is considered better than most of its competitors across all of the categories asked about and is considered better than all of them for history and heritage

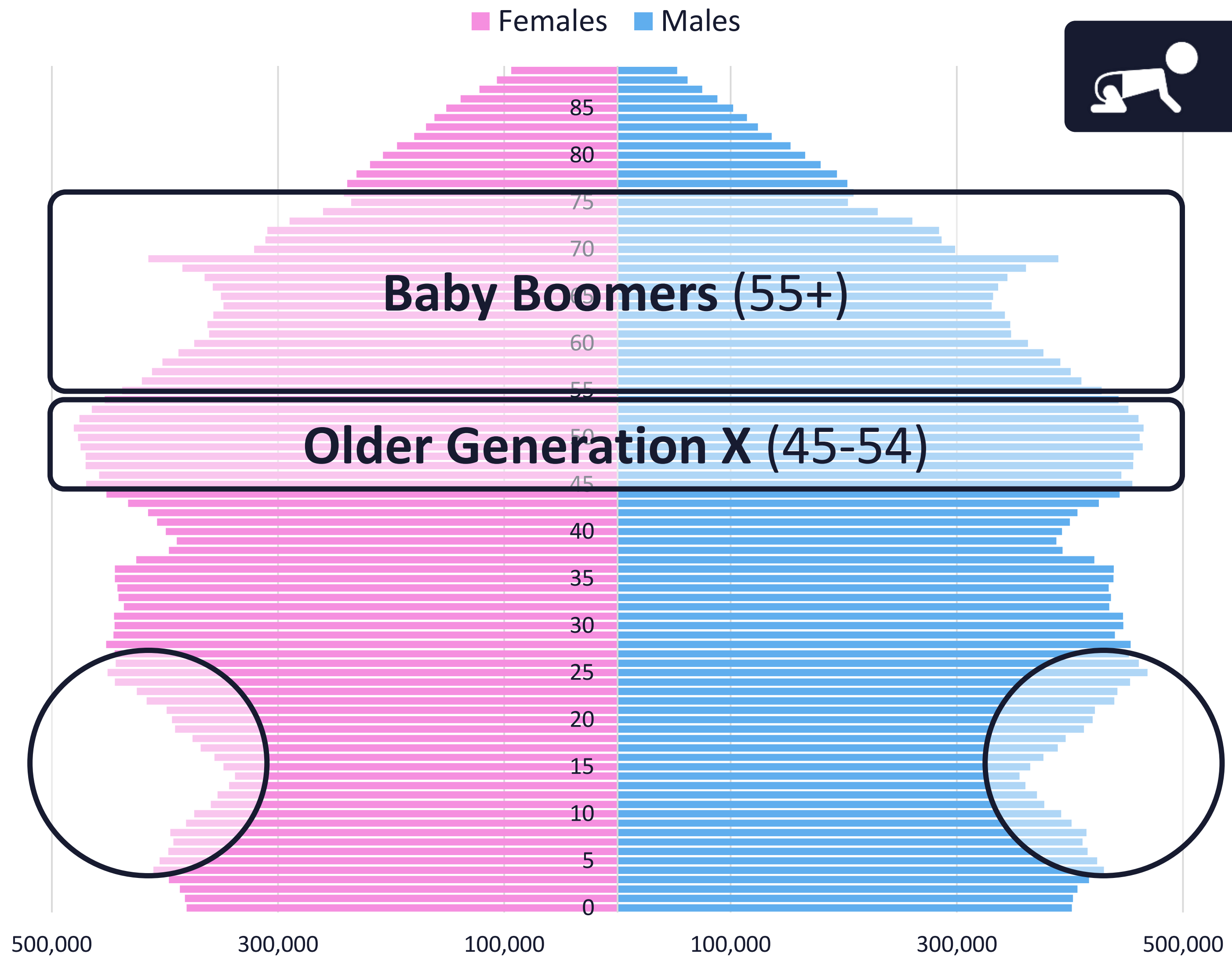
# THE CHANGING FACE OF TOURISM

# The Generational Market

## Introducing the different generations

| | **Maturists** (pre-1945) | **Baby boomers** (1945-1960) | **Generation X** (1961-1980) | **Generation Y** (1981-1995) | **Generation Z** (post-1995) |
|---|---|---|---|---|---|
| Formative experiences | Wartime rationing<br>Rock 'n' roll<br>Nuclear families<br>Defined gender roles (especially for women) | Cold War<br>Swinging Sixties<br>Moon landings<br>Woodstock<br>Family-orientated | Fall of Berlin Wall<br>Reagan/ Thatcher<br>Live Aid<br>Early mobile technology<br>Divorce rates rise | 9/11 terrorist attacks<br>Social media<br>Invasion of Iraq<br>Reality TV<br>Google Earth | Economic downturn<br>Global warming<br>Mobile devices<br>Cloud computing<br>Wiki-leaks |
| Attitude toward career | Jobs for life | Organisational<br>Careers defined by employers | 'Portfolio' careers<br>Loyal to profession, not to employer | Digital entrepreneurs<br>Work 'with' organisations | Multi-taskers<br>Will move seamlessly between organisations |
| Signature product | Automobile | Television | Personal Computer | Tablet/ Smartphone | Google glass, 3D printing |
| Communication media | Formal letter | Telephone | Email and text message | Text message/ social media | Hand held communication devices |

# Growing aging UK population




**Significant demographic shift**

- Post-war baby boomers are reaching retirement age
- 1960's baby bulge (35-54 years) will add to the aging population
- Estimated over 60 year olds will rise by 40% between 2013 and 2035
- Aging generation will not be replaced by younger adults



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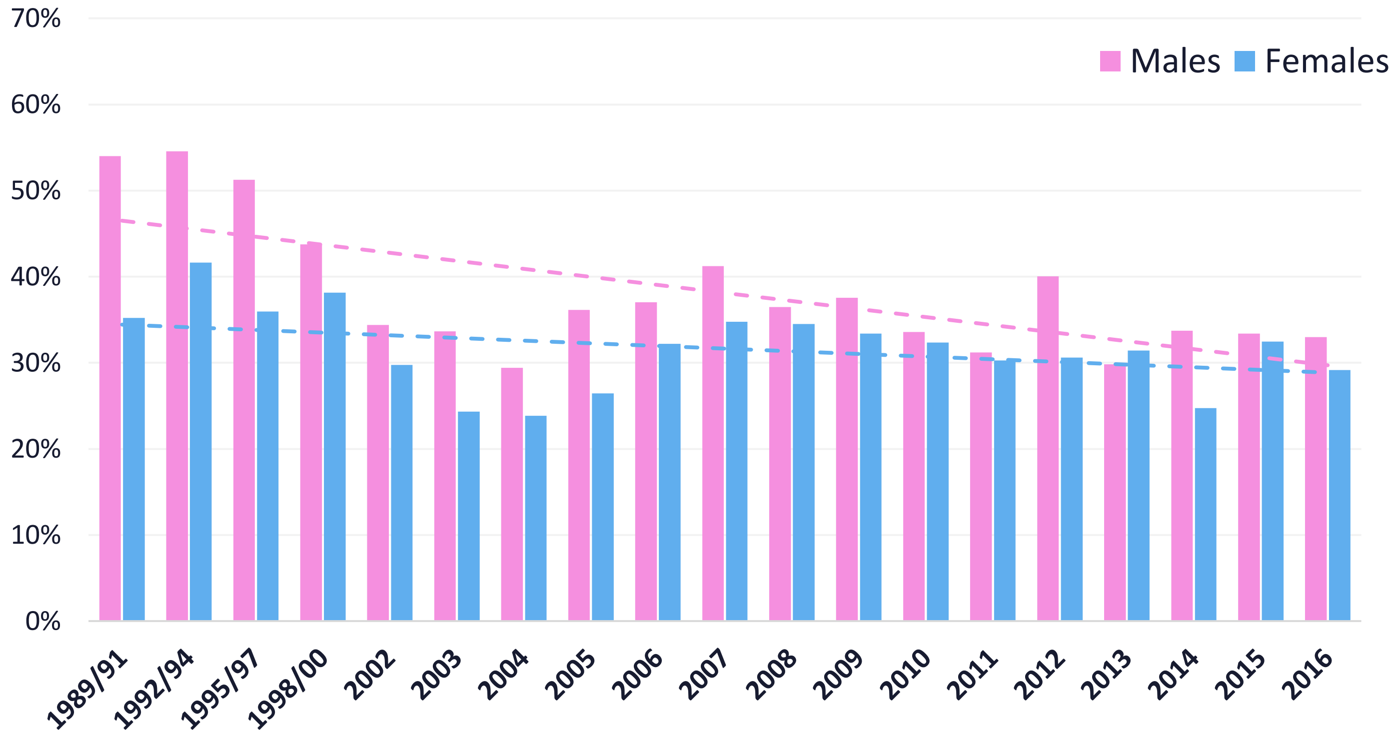
# Changing Trends

## Less young people are learning to drive

*Full driving licence holders in the UK aged 17-20*




**Main reasons**

- Incomes are stagnant
- Learning to drive/ running a car too expensive

**Since 1995…**

- 76% rise in cost of living
- 140% rise in cost of maintaining a car
- Petrol and oil costs increased 145%

Services such as Uber, community bicycles and Deliveroo mean that people do not need their own vehicle

*Uber, the world's largest taxi company, owns no vehicles. Facebook, the world's most popular media owner, creates no content... And Airbnb, the world's largest accommodation provider, owns no real estate. Something interesting is happening.*

*Tom Goodwin (Head of Innovation at Zenith Media)*

# How Millennials are shaping consumer trends

**Experiences** over things

The growth of the collaborative economy and a rise in spending in the leisure sector is seeing a shift in what consumers are willing to pay for

Spending money on owning goods and services

Pay for access to goods, services and experiences

Consumers increasingly want to enrich their lives with experiences

- make their spare time more enjoyable
- seeking services that bring convenience and enjoyment

Simultaneously the broader macroeconomic drivers have helped consumers to have more disposable income, which they are increasingly choosing to spend on leisure activities.

# How Millennials are shaping consumer trends

## Life enriching experiences

The consumer mind set is evolving as they seek experiences that enrich lives, add convenience and create memories.

- economic conditions have supported the emergence of a more confident leisure consumer
- more disposable income to spend on leisure
- expenditure on leisure has grown nearly twice as fast as total consumer expenditure

The leisure sector is now broader than before with the sharing economy at the forefront of introducing innovative leisure offerings using new business models.

A new classification of leisure activities has emerged:

- considered, occasional leisure activities
- frequent, habitual leisure activities

# How the Leisure Industry is Changing

## More confident consumers

**Leisure spending has grown at a faster pace than total consumer expenditure**

*Record high employment*

*Shifting spend from needs to wants*

*Low inflation*

*Owning less, sharing more*

*Making more time for leisure*

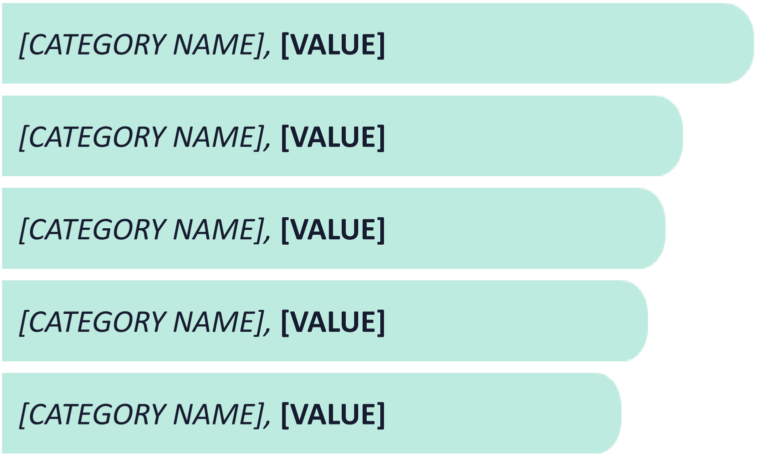
*Recovering earnings*

*Seeking enriched lives*

# How the Leisure Industry is Changing

## More focus on sharing than owning

**Making consumers more efficient with more to spend on leisure**

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# How the Leisure Industry is Changing

**A diverse and dynamic market place**

**Considered, occasional**

*Higher cost activities*

**Habitual, frequent**

*Lower cost activities*

# How the Leisure Industry is Changing

## Leisure spending

Worth **£117 billion** in revenue

**5%** annual sector growth since 2010

**7.4%** of the UK GDP in 2014

**1 ½ times more** discretionary spend as retail

Growing **twice as fast** as retail

## The future of leisure is…

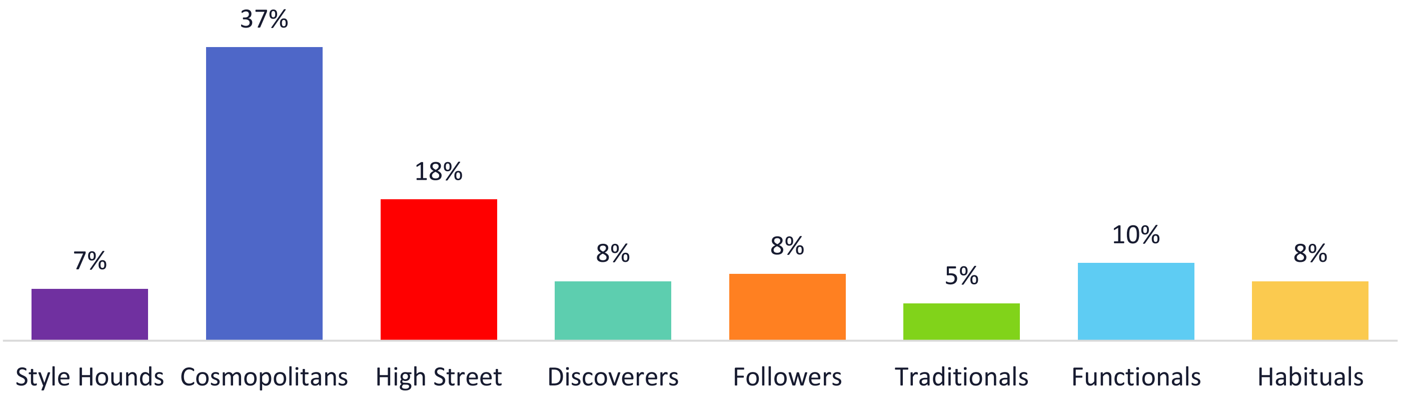
Innovation and technology

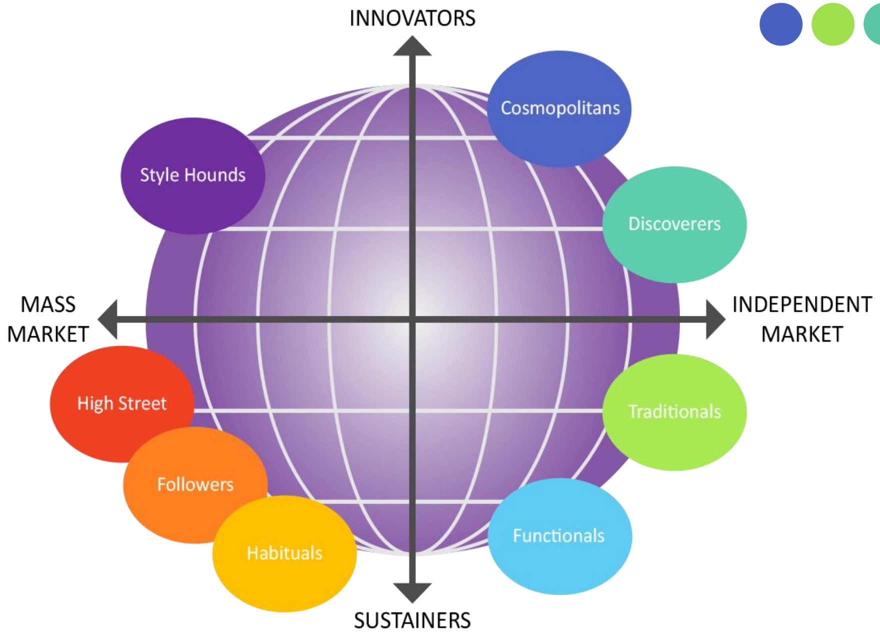
Watching evolving business models

Combining leisure and retail

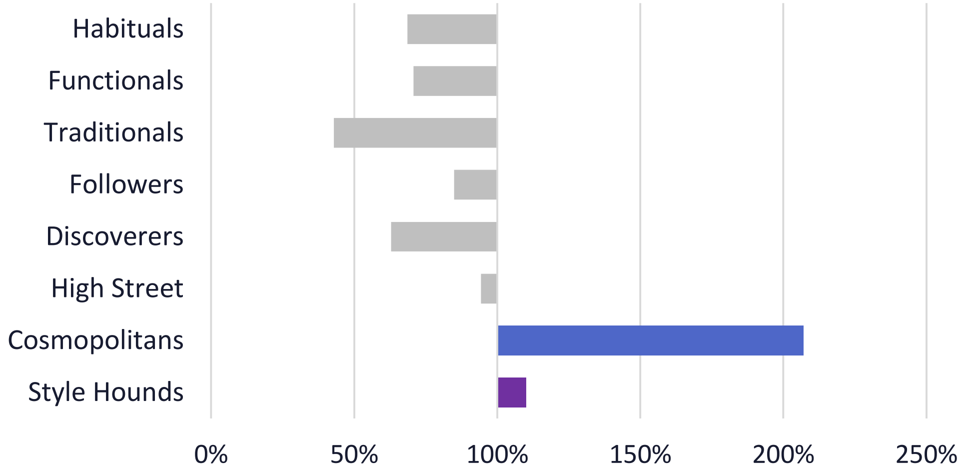
# ARKLEISURE - Opportunities

Visitors within the past 2 years




% of visitors in the past 2 years compare to national average




- From the respondents who had visited Plymouth within the past 2 years, a much higher proportion were Cosmopolitans than in the general population
- There was also more Style Hounds that had visited than in the general population
- This is the same finding as with the 2014 survey, however this year it was not found that Habituals were also more likely to visit

Please see appendix for descriptions of each segment.

# THANK YOU

## Destination Plymouth

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