Bridlington

Destination Benchmarking & Visitor Survey

2009



Issued 12th February 2010

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DESTINATION BENCHMARKING & VISITOR SURVEY 2009

Executive Summary of Conclusions

The Welcome to Yorkshire (formally Yorkshire Tourist Board) Market Intelligence Team in conjunction with The Research Solution is pleased to present the findings from the Bridlington Visitor & Destination Benchmarking Survey 2009, commissioned on behalf of East Riding of Yorkshire Council.

This report provides the findings of 401 face to face surveys completed during July 2009 through till September 2009. Bridlington Visitor Survey results for this period have also been submitted into the National Destination Benchmarking scheme. Comparisons with other resorts and all destinations and with the Yorkshire Regional Visitor Survey results for the quarter 1 period (May - August 2009) where possible, can be found throughout this report.

The aim of the research was to generate information on the origin, profile and behaviour of visitors to Bridlington. The survey also provided an insight into visitors' views on the strengths and weaknesses of Bridlington as a visitor destination and evaluated opinions on specific aspects of the visitor experience. The resulting data can be used to help guide tourism policy for the town.

The following summary is based on the overall findings from the benchmarking and visitor survey.

GENERAL FINDINGS

- 57% of visitors to Bridlington were day visitors from home, on a par with the regional average. Of the overnight visitors, half were staying overnight within Bridlington whilst the remainder were staying elsewhere in the region and visiting Bridlington for the day.
- Just over two fifths (43%) of visitors were adult couples, followed by 32% who were on holiday with their children. There is good mix of all age groups, with almost a third (31%) aged 24 and under.
- Yorkshire and The Humber was the top supplier of all visitors to Bridlington. Only 2% of visitors were from overseas, including Spain, Germany, France, Canada and Mexico.

- The overwhelming majority (94%) of respondents were in Bridlington for a leisure/holiday trip, slightly above the region (89%) and all resorts (90%) averages and significantly above the all destination average (74%).
- The average length of stay by visitors stopping overnight in Bridlington was much higher than the regional visitor survey and all destination averages (5.2 and 5.7 respectively). The length of stay in other resorts was on a par with Bridlington (6.5) nights.
- Respondents staying overnight in Bridlington used a variety of both paid and free accommodation. 31% of visitors staying in paid accommodation did so in a Hotel/ Guesthouse/Inn/B&B. Caravan/camping was the most used type of free accommodation (19%).
- Almost half (49%) of visitors staying in commercial accommodation had booked directly with the accommodation provider over the telephone
- 89% of visitors to Bridlington arrived by car, a higher percentage compared to the all resorts and all destinations proportions.
- Only 9% of visitors to Bridlington were making their first trip to the town. Much lower than the region, all resorts and all destinations averages.
- Taking this into account, it is not surprising that 70% of visitors to Bridlington had visited the town at least twice in the last 2 years.
- Previous experience/local knowledge was the most used source of information both before and during respondents visit to Bridlington
- 33% of visitors indicated that the main activity they had undertaken on their trip was strolling around and enjoying the ambience of the town. Other activities planned or had been undertaken included eating and drinking (58%) and shopping/looking around the shops (35%)
- Relaxing and friendly were the two most noted key words used by visitors to describe Bridlington. These were also the top two responses in the Regional Visitor Survey.
- 18% of respondents who visited Bridlington on this trip had a serious illness or disability. These included; mobility impairment and a long term illness. 44% of visitors rated the ease of access within Bridlington as very good (13%) or good (31%)
- The top responses regarding the most enjoyable aspect of the trip to Bridlington included; seaside/coast/beach (33%), relaxing/peaceful environment (27%) and Scenery/ countryside (19%)
- When asked what, if anything, could be improved about their visit to Bridlington, 46% felt that there wasn't anything that could be improved. Better upkeep of the area (15%), better range of shops (7%) and cheaper car parking (6%) were noted by some

respondents, as was a better range of eating facilities and more car parking, cited by 4% of respondents respectively.

Areas where Bridlington performed better than the 2 national comparator scores

- The highest scoring indicator related to value for money at accommodation (4.62).
- Use of the Tourist Information Centre received positive scores across all three areas with usefulness of information (4.64), quality of service (4.58) and ease of finding (4.31) all receiving higher ratings than both all resorts and the all destination averages.
- Quality of service at attractions scored highly with an average of 4.43 as did value for money (4.38)
- The value for money at places to eat and drink received a higher score than the two national comparators, 4.09 compared with 4.05 and 3.99
- Ease of finding way around – using road signs (4.29) and pedestrian signs (4.27) scored above all resorts and the all destination ratings
- Cost of parking received the lowest of the ratings in Bridlington at 3.60. It was however, still higher than the all resorts towns and all destinations averages (2.97 and 3.06 respectively)
- The availability of public toilets (3.83) also received ratings above its two comparators.

Areas where Bridlington performed below the 2 national comparator scores

- The shopping facilities in Bridlington performed below its national comparators, with the range of shops (3.45), quality of goods on offer (3.64) and quality of service received, scored considerably below both the all resorts and all destination ratings.
- The range of places to eat and drink (3.82) and the quality of service (4.11) in Bridlington also scored lower than the national benchmarking comparators.
- Although receiving fairly positive scores, the feeling of welcome and the general appearance in Bridlington were rated below all other resorts and the all destination scores.

In general Bridlington performed well against the national comparators.

1.0 Introduction, Brief and Methodology

1.1 Introduction

The Welcome to Yorkshire (formally Yorkshire Tourist Board) Market Intelligence Team in conjunction with The Research Solution is pleased to present the findings from the Bridlington Visitor & Destination Benchmarking Survey 2009, commissioned on behalf of East Riding of Yorkshire Council.

This report provides the findings of 401 face to face surveys completed during July 2009 through till September 2009. Bridlington Visitor Survey results for this period have also been submitted into the National Destination Benchmarking scheme. Comparisons with other resort destinations and with the Yorkshire Regional Visitor Survey results for the Quarter 1 period (May - August 2009) where possible, can be found throughout this report.

The aim of the research was to generate information on the origin, profile and behaviour of visitors to Bridlington. The survey also provided an insight into visitors' views on the strengths and weaknesses of Bridlington as a visitor destination and evaluated opinions on specific aspects of the visitor experience. The resulting data can be used to help guide tourism policy for the town.

1.2 Destination Benchmarking

A core output of this survey is the gathering of benchmarking data to measure visitor profile characteristics and visitor satisfaction on a range of indicators that comprise 'the visitor experience'. These include the cleanliness of streets and public toilets, provision and cost of car parking, quality of local restaurants and the friendliness of local people. Indicator scores for similar types of destination across the country are then compared to measure relative performance and identify best practice.

The overall benefit of benchmarking is that it provides a customer-focused basis on which to set priorities for action and improve the destination 'product'. Uses include:

- Identifying strengths and weaknesses, since under-performance against key competitors can be a powerful influence on decision-makers

- Securing additional resources for visitor management projects, often by identifying needs which can be met by funding from the budgets of other Council departments

- Raising the profile of the visitor management function within the Council and helping to secure political support for improvements to the town

- Influencing product suppliers and the private sector to improve, acting as a driver for Council initiatives aimed at improving standards

- Generating positive PR from benchmarking findings, playing a positive role in building civic pride

- Helping to identify best practice amongst a range of destinations which can be shared

- Demonstrating achievement through year on year improvements against baseline data to measure the impact of capital expenditure on physical products and campaigns

The benchmarking scheme is co-ordinated and delivered by the Regional Tourist Boards/ Destination Management Partnerships. This ensures that a standardised methodology is adhered to, and thus survey data is comparable. The standard factors used to ensure quality and consistency includes:

- Face to face interviewing surveys using trained interviewers over a core period of June/July to September/October, carried out among non-residents

- Sampling using around 400 interviews at locations and times which reflect visitor usage

- Standard core questions incorporated into the Welcome to Yorkshire Visitor Survey questionnaire

- Reporting the benchmarked data to a standard format, providing destinations with their own scores and average scores for their comparable type of destination – in this case, resorts.

Results relating to individual destinations are issued on a confidential basis only.

A central database holds all the profile and scoring data for individual destinations, and is used to collate overall averages for each destination type. Visitor opinion scores have been aggregated into a **three-year rolling average** (combining the years 2007, 2008 and 2009) to provide the fullest possible comparisons for each type of destination. Rolling averages also have the benefit of smoothing out random, year-to-year fluctuations and enable clearer observation of trends.

1.3 Objectives

The objectives of the 2009 Survey were as follows:

i) To provide basic data on the profile, origin, behaviour, use of facilities and opinions of visitors to Bridlington to help improve understanding of tourism within the town.

ii) To ensure that marketing campaigns are properly focused and allow their effectiveness to be monitored.

iii) To identify the main reasons why visitors come to Bridlington and their particular likes and dislikes.

iv) Where possible, to allow emerging trends to be identified so that more informed decisions can be made in relation to future marketing and visitor provision in the town.

1.4 Methodology

This research project was undertaken using a face to face survey with visitors. A combination of both quantitative and qualitative questions was used.

In total, 401 completed face to face surveys were conducted with both day and staying visitors to Bridlington. The results from this survey have been submitted to take part in the National Destination Benchmarking Scheme, to allow comparisons with other resort destinations. Details of the destination benchmarking scheme can be found in section 11.1 below.

Interviewing was carried out at five locations within the town at prime visitor attractions, as indicated in table 1.1.

Table 1.1		
Location	**Number of Respondents**	**% of Respondents**
Bridlington Seafront	176	44%
Sewerby Hall	119	30%
Bridlington TIC	72	18%
Bridlington Harbour	19	5%
Bridlington Town Centre	15	4%
Total	401	101%

**Please note that due to rounding the total percentage adds up to more than 100%*

A high proportion of interviews took place on the seafront, accounting for over two thirds (44%) of the interviews conducted. Due to the nature of the destination, only a relatively small number of interviews (15) were conducted within the Town Centre.

Table 1.2		
Month	**Number of Respondents**	**% of Respondents**
May	18	5%
June	27	7%
July	124	31%
August	127	32%
September	71	18%
October	34	8%
Total	401	101%

**Please note that due to rounding the total percentage adds up to more than 100%*

The bulk of the interviews were conducted during the peak summer months of July and August with almost two thirds (63%) undertaken during this period.

Because satisfaction surveys rely on visitors having used or experienced a particular service or facility, interviewing was not conducted before 11am, and only those who were at least half way through their visit were interviewed.

The survey was conducted on a simple random basis and interviewers asked the ‘next person to pass’ if they would participate. If the interviewee was a resident of Bridlington, the interview was terminated after question one. Questions were designed to take into account the fact that visitors could be at the middle or end of their current trip and therefore respondents were asked questions which involved making predictions for future actions, i.e. spending later on the trip, using facilities or services later on etc.

It is acknowledged that on-site visitor surveys are liable to under-count certain sections of the visitor market, for instance coach parties, business visitors and overseas visitors. In the case of overseas visitors, under counting may occur where a problem arises in translation, in the interpretation of questions and in some cases a reluctance to become involved with what appear to be officials/government.

<u>Notes of base size</u>

For the sake of confidence in the data findings, a minimum sample of 400 respondents was proposed, which is recognised as a valid sample size for reliable results. This is the recommended base for all destinations. The Bridlington data was slightly above this at 401.

Base size refers to the number of people who have responded successfully to a question, whether the response is positive or negative. The base does not include the ‘don’t know responses’.

The base for an analysis table can be larger than the sample drawn from any particular destination, if the question is also asked in other destinations. Alternately, the base for a question for a destination could be smaller than the overall sample size due to ‘not answered’ responses and to the fact that the question is not asked to all the respondents that constitute the overall sample size for that destination.

<u>Notes on satisfaction and opinion scores</u>

Scaling techniques are used for this analysis where respondents are asked to indicate their satisfaction or importance attached to a specific factor using a standard set of questions. This is known as the Likert scale and is useful as responses can be quantified and benchmarked. Each factor or indicator was rated on a range of one to five 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 an average opinion ‘score’ (out of a maximum of five) to be calculated.

1.5 Presentation of Results

This report makes distinctions between the visitor profiling questions and benchmarking analysis. Profiling questions, such as origin, transport, etc are compared with the regional visitor survey, along with benchmarking analysis of indicator ratings, with regional and national comparators where available. The results shown are generally presented for all visitors. However, given the sample sizes for both day and overnight visitors' analysis of the two visitor markets are shown throughout the report.

Each factor for which an opinion is sought, is rated on a scale of one to five, where 1= 'very poor' (or the most negative response), 2= 'poor', 3= 'average', 4='good' and 5= 'very good' (or the most positive response). This allows an opinion score out of a maximum of five to be calculated.

Mean scores are also compared against 'all Resort Towns' average results which represent the combined results from all resorts participating in the benchmarking surveys in 2009. Comparisons are also shown from the Regional Visitor Survey where possible.

As a general guide, when using a five-point scale (i.e. for samples of 100-1000), there must be a difference of at least 0.2 between two mean scores for this to be significant.

1.6 Definitions

For the purposes of this report, visitors to Bridlington are divided into three main types:

- *'Day visitors from home'* - visitors who had travelled from, and were returning to their own home on the day of their visit.
- *'Staying visitors'*– visitors who were staying overnight for at least one night in some form of accommodation, including staying with friends and relatives.

N.B. For accommodation benchmarking purposes, staying visitors have been further broken down to those staying within Bridlington and those staying elsewhere in the region.

2.0 Key Findings

2.1 Visitor Segmentation

The survey data has been analysed in two ways. Firstly, by considering all visitors as a single market and secondly, by segmenting visitors into different groups according to the type of trip made. This approach helps to establish the differences and similarities between different types of visitor. Detailed information about various groups of visitors will assist in improving the effectiveness of marketing activities, visitor management and product development. Visitors can be divided into two segments according to the type of trip they are making to the town.

Over half (57%) of visitors to Bridlington were on an irregular day trip totalling over 3 hours or more. These are referred to as day visitors throughout the remainder of this report. This was only slightly lower than the number of day visitors in the regional visitor survey (59%).

Table 2.1: Type of Visitor

	Number of Respondents	Bridlington	Regional VS
		396	*5743*
On an irregular day trip lasting longer than 3 hours in total	228	57%	59%
Staying visitor in overnight accommodation within Yorkshire	148	37%	29%
Staying visitor with friends or relatives within Yorkshire	16	4%	7%
Irregular business visitor on a day trip over 3 hours time	5	1%	2%
Staying visitor from overnight accommodation elsewhere in UK	2	0%	1%
Business visitor staying overnight within Yorkshire	2	-	0%
Staying visitors with friends or relatives elsewhere in UK	-	0%	1%
Total	401	99%	99%

NB: Table may not add up to 100% due to rounding

Just over a fifth (21%) of visitors interviewed in Bridlington were staying overnight in the town with a further fifth staying overnight elsewhere in the region. Seaside towns generally attract more overnight visitors than many other destinations and it is not surprising that a relatively high percentage of visitors were staying overnight.

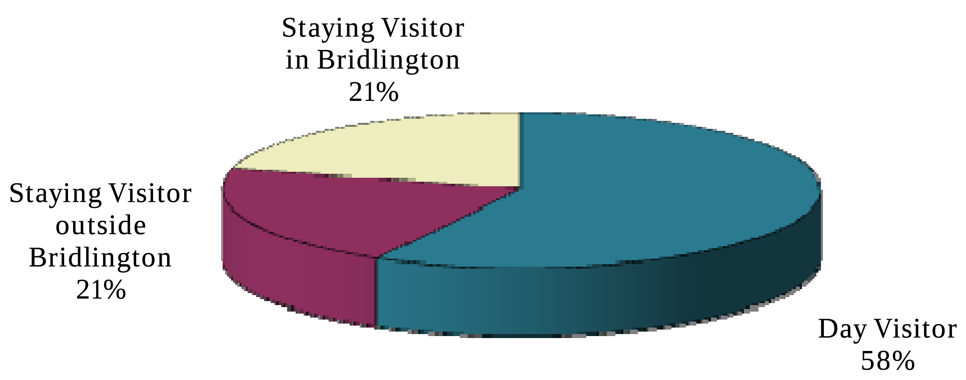
Table 2.2: Summary type of visitor

	Number of Respondents	Bridlington	All Resorts	All Destinations
Day trip from home or staying elsewhere in region	317	79%	63%	70%
Staying visitor within Bridlington	84	21%	37%	30%
Total		100%	100%	100%

NB: Totals may not add up to 100% due to rounding

The proportion of visitors staying both inside and outside of Bridlington was fairly evenly split with just over a fifth (21% respectively) of the visitor market staying inside and outside of the town. The proportion staying inside the town was slightly lower than the 'all resorts' average.

Figure 2.1: Type of Visitor



3.0 Demographic Profile of Visitor

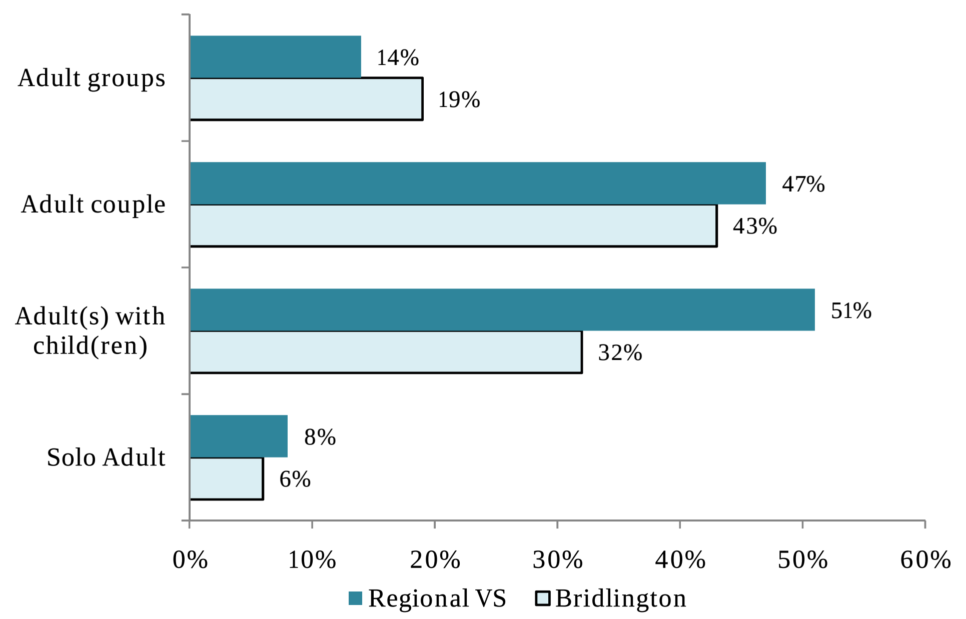
3.1 Group Characteristics

A total of 401 parties of visitors were surveyed and provided demographic data on their group. The average (mean) number of people per group was approximately 3.1 giving a total of 1250 people included in the survey sample.

The average group size in Bridlington (3.1) is considerably higher than both the all resorts average and the all destinations average (2.8 and 2.5 respectively). The average number of adults per visiting party was again higher than both comparator scores.

Clearly the most dominant groups interviewed were adult couples (43%), followed by almost a third (32%) who were on holiday with their children.

Figure 3.1: Party Composition



NB: Chart will add up to more than 100% due to multiple responses given

Almost a fifth (19%) of visitors to Bridlington had travelled with a group of adults, higher than the regional average of 14%. The nature of the tourism product and the age of those visiting Bridlington shown in the table below appear to correlate with this.

The UKTS 2008[1] results show that across England as a whole, one third (33%) of visitors travelled with their partner only. This is a lower proportion than those visitors to Bridlington, with just over two fifths of visitors making a trip to the town with their partner only.

3.2 Age Profile

Visitors were asked the age category of the members of their immediate party. The table below indicates that there is good mix of all age groups, with almost a third (31%) aged 24 and under. compared with a higher regional proportion of 42% of visitors aged under 24 years of age.

Table Age 3.1: Group – by Day/Staying visitors

	All		Day		Staying	
	Bridlington	Region VS	Bridlington	Region VS	Bridlington	Region VS
0-15	18%	26%	18%	29%	20%	19%
16-24	6%	6%	7%	6%	5%	7%
25-34	7%	10%	8%	10%	3%	8%
35-44	10%	16%	10%	16%	8%	15%
45-54	15%	13%	16%	12%	15%	15%
55-64	19%	16%	18%	14%	22%	19%
65-74	16%	11%	17%	10%	16%	13%
75+	8%	3%	7%	3%	11%	3%
Total	99%	101%	101%	100%	100%	99%

NB: Numbers may not total 100% due to rounding

8% of visitors to Bridlington were aged 75+ years, double the amount in this age group than in the Regional Visitor Survey. In general, there were a higher proportion of older adults aged 55+ visiting Bridlington (43%) compared to the region (30%).

[1] UKTS – United Kingdom Tourist Survey

3.3 Categorising the Visitor

Respondents were asked to state their normal place of residence. For domestic (UK) visitors the region of origin has been used as the basis for analysis.

In total, 98% of visitors to Bridlington were from the UK and only 2% were overseas visitors, slightly below the average for the region.

The table below indicates the main region of origin of UK visitors to Bridlington.

Table 3.2: Region of Origin

Region	*All*	*Day Visitor*	*Staying Visitor*
Yorkshire And The Humber	75%	91%	53%
East Midlands	10%	4%	17%
North West	6%	3%	11%
North East	2%	1%	4%
South East	2%	0%	4%
West Midlands	2%	0%	4%
Scotland	1%	1%	3%
East	1%	0%	2%
London	0%	0%	1%
Wales	0%	1%	0%
Total Base	*339*	*196*	*143*

The core market is fairly focused, with the bulk of such visitors drawn from the surrounding neighbouring regions, accessible by quality road and rail systems. Overall, Yorkshire and the Humber supplied 75% of all visitors to Bridlington. The East Midlands provide 10% of visitors to Bridlington followed by the North West (6%) The remaining visitors are drawn from the rest of the UK and a small proportion from overseas.

A high proportion of visitors to Bridlington are on a day visit to the town so it is not surprising that high levels of visitors are from within Yorkshire and Humberside itself. The day trip market is extremely competitive and will continue to be so, with competition coming from other destinations and other leisure activities (home entertainment, leisure retail parks, etc).

3.4 MOSAIC Profile

The collection of postcodes from respondents allows us to conduct a more detailed visitor profile and segmentation of visitors through the use of Experian's MOSAIC classification system, providing information on what type of people they are, what their interests are, and where they live. All this information is vital for successful marketing and promotional campaigns.

MOSAIC segments the visitor market place into 11 separate groups and 61 types, based on various attributes, such as life stage, family composition, affluence, newspaper readership, internet usage, interests and activities, and so on. The profiles are compiled following detailed analysis of the latest societal trends in the UK, using Government Census data combined with a series of primary research studies and national surveys, including the TGI Leisure Index. The market segmentation profile for Bridlington was conducted using this system.

Interpreting the results

The analysis itself is conducted on two levels; a Count Analysis and a Penetration Analysis. The count analysis looks at the percentage of visitors falling into each MOSAIC Group and Type compared to the total number of visitors. This is good for a simple look at who your visitors are from an 'actual numbers' perspective. The penetration analysis looks at how well represented each Group and Type is compared to the national average. In other words, it shows you the types of visitor that have above average and below average numbers visiting the area in question, helping to identify hot prospect markets (those with a high propensity to visit) and also potential areas for growth.

Please note that the number of postcodes used in the analysis is slightly lower than the sample size due to unrecognised postcodes, duplications, respondents residing outside of the UK etc. However, this will not distort the results, as they can still be used with confidence.

Top Mosaic Groups

Group	% Visitors to Bridlington	% Visitors to Region	% UK Population	Penetration	Index
A Symbols of Success	6%	10%	10%	0.000	64
B Happy Families	10%	13%	12%	0.000	84
C Suburban Comfort	15%	20%	15%	0.001	104
D Ties of Community	26%	20%	16%	0.001	161
E Urban Intelligence	2%	4%	7%	0.000	32
F Welfare Borderline	2%	2%	6%	0.000	29
G Municipal Dependency	11%	6%	7%	0.001	158
H Blue Collar Enterprise	10%	8%	11%	0.001	90
I Twilight Subsistence	5%	2%	3%	0.001	154
J Grey Perspectives	6%	8%	7%	0.000	76
K Rural Isolation	5%	6%	5%	0.001	100
Unclassified	2%	0%	0%	0.003	533
Total	**100.00**	**100.00**	**100.00**	**0.001**	**100**

The above table shows a breakdown of Bridlington's visitors by each of the 11 Mosaic Groups compared to both the regional visitor profile and national UK population. A fuller breakdown by type can be found in the appendices of this report.

In terms of volume the top MOSAIC Group amongst visitors to Bridlington is Group D Ties of the Community, typically represented by younger couples with children, often working in skilled trades and manufacturing and who enjoy cinema, films and going to the pub. This group also has a high index score, meaning there is a higher than average proportion in this group visiting Bridlington compared to the UK population.

In particular, types D22 Affluent Blue Collar, D23 Industrial grit and D24 Coronation Street make up a high proportion of this group within Bridlington's visitor profile and all have high index scores. Despite falling into the same overall group, these types have quite distinct demographics. Type D22 are typically older manual workers with a good standard of living and whose leisure interests are usually confirmed to fairly orthodox pursuits while types D23 and D24 consist of younger families with more limited incomes whose holiday fantasy are often a lazy beach holiday in the sun but in reality tend to be limited to traditional and familiar seaside resorts in the UK.

Group C forms the next largest proportion of visitors to Bridlington, in particular types C16 Conservative Values and C17 Small Time Business, generally reasonably well off older couples with grown up children. Both types are fairly mainstream in tastes and values and tend to enjoy hobbies such as golf, antiques, sailing and walking, taking fairly frequent holidays and short breaks, possibly coach tours, often with groups of like minded groups of friends. This is likely to account for the the fairly high proportion of adult groups visiting Bridlington compared to the regional average.

Groups B Happy Families and G Municipal Dependency also form a large proportion of visitors to Bridlington, largely representing the family market, although with considerable variation in wealth. Group B are young wealthy families who enjoy active sports and leisure pursuits and whose holidays often involve camping or caravanning or self-catering. Group G meanwhile are typically lower income families

Group H, the fourth largest group within Bridlington's visitor profile, typically represent middle aged couples with children, earning a reasonably good living. In particular, types H44 Rustbelt Resilience and H45 Older Right to Buy have the greatest representation within this group. These people tend to enjoy taking self-catering or caravanning holidays in the UK, often going to familiar places, and regularly eat out in pubs and restaurants with their families. These people represent a particularly a good market for repeat visits.

4. CHARACTERISTICS OF VISIT

4.1 Main Purpose of Visit to Bridlington

Visitors were asked the main purpose of their visit to Bridlington on the day they were interviewed.

The main purpose of a visit, noted by over 9 out of 10 (94%) respondents was for leisure/holiday visits, higher than the regional survey results, above the average for all resorts (90%) and considerably above the all destinations average (74%). Only 4% of visits to Bridlington were for visiting friends and relatives, below the regional average of 8%, and both of the two national comparator scores.

Table 4.1: Main purpose of visit

Main Reason for Visit	Number of Respondents	Bridlington	Regional VS	All Resorts	All Destinations
Leisure/holiday	378	94%	89%	90%	74%
Visiting friends/relatives	18	4%	8%	6%	11%
Business	5	1%	2%	3%	10%
Special shopping trip	-	-	-	-	2%
Language student	-	-	-	-	1%
Other	-	-	-	1%	1%
Total	401	99%	99%	100%	99%

NB: Columns may not add up to 100% due to rounding

A higher proportion of overnight visitors were making a trip to see their friends and relatives than day visitors (8% compared with 3%).

No one was staying in Bridlington on business during their trip.

4.2 New / Repeat Visitors – Segment Variation

Visitors were asked if they had ever been to Bridlington on a previous occasion. The presence of first time visitors to a destination is important in terms of visitor management, presuming their lack of knowledge about the area. A high proportion of visitors have visited Bridlington before (91%). The repeat visitor in many respects is easier to attract as they will know the general nature of what a visit is likely to involve, for example, how long it takes to get there and what there is to see and do. It is worth noting, however, that being a repeat visitor does not automatically mean that the knowledge of the area and attractions is comprehensive and, furthermore, repeat visitors may have entrenched patterns of behaviour that may be difficult to influence through visitor management.

Bridlington attracts a significantly lower proportion of new visitors to the area compared with both the region and the 2 national comparator averages.

Table 4.2: New/Repeat Visitors

	Number of Respondents	Bridlington	Regional VS	All Resorts	All Destinations
New	36	9%	28%	19%	25%
Repeat	365	91%	72%	81%	75%

Bridlington saw a higher level of new visitors in the overnight market compared with the proportion of new visitors in the day visitor market (15% compared with 7%).

Attracting first time visitors to the area is important to any destination. Further marketing may help to encourage the first time visitor to Bridlington.

4.3 Time since last visit

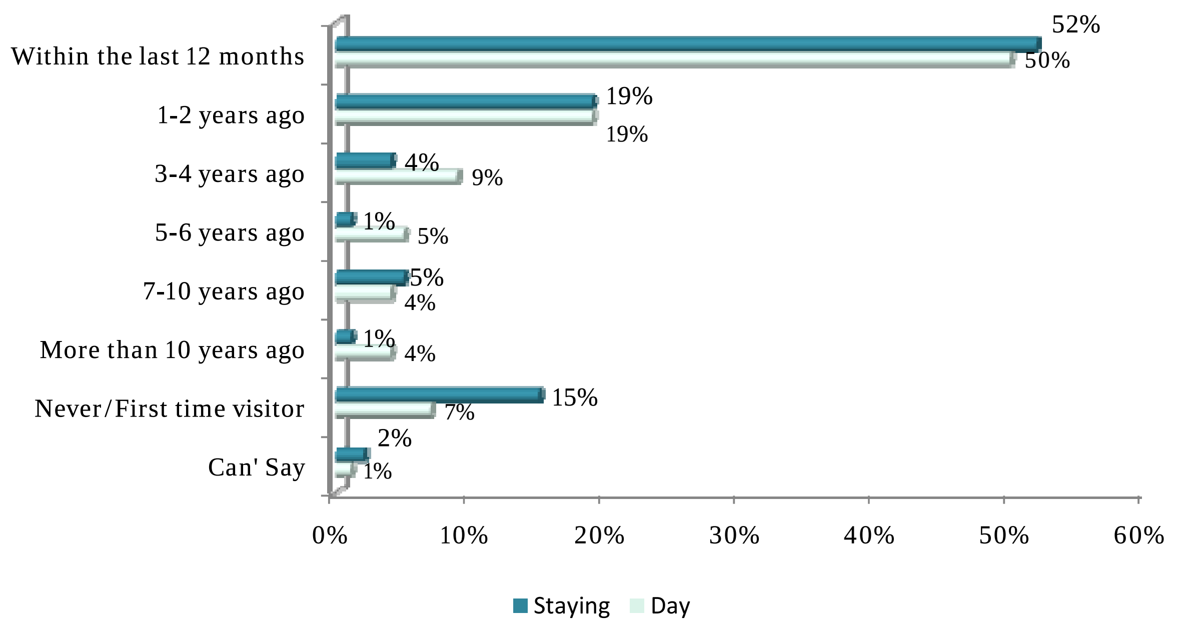
More than half (51%) of visitors to Bridlington had previously visited the town within the last 12 months, above the regional average of 41%. This demonstrates a regular and loyal customer base.

Table 4.3: How many times have you previously visited Bridlington		
	Bridlington	Regional VS
Within the last 12 months	51%	41%
1-2 years ago	19%	11%
3-4 years ago	8%	7%
5-6 years ago	4%	4%
7-10 years ago	4%	3%
More than 10 years ago	4%	6%
Never/first time visitor	9%	28%
Can't say	1%	0%

4.4 Time since last visit – by day/staying visitors

There was little difference in the number of day and staying visitors who had visited Bridlington within the past 12 months (50% compared to 52%)

Figure 4.1: Time since last visit



4.5 Frequency of visits to Bridlington during last two years.

Visitors who had been to Bridlington before were asked how many times they had visited in the past two years.

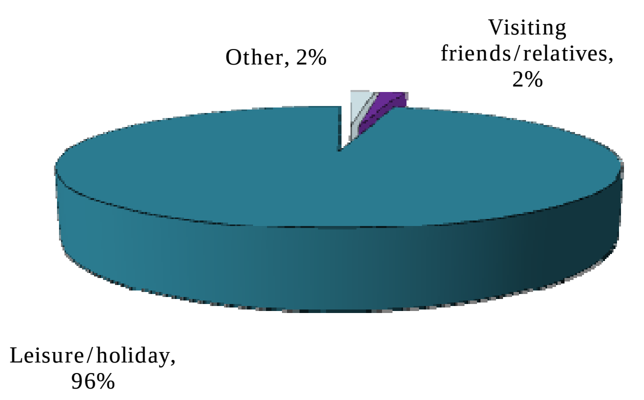
Table 4.4: How many times have you visited Bridlington during the last 2 years	
	Bridlington
Once	32%
Twice	28%
3 times	13%
4 times	11%
5 times	4%
6 times	5%
7+	6%
Total	99%

Over three quarters (77%) of staying visitors had visited Bridlington up to 3 times in the last two years compared with 73% of day visitors

4.6 Purpose of previous trip

Having identified the new and repeat elements, visitors were asked why they had previously visited the area. In all, it can be seen that the main purpose of their previous visit was again for a leisure/holiday visit (96% of visitors).

Figure 4.2: Purpose of previous visit



4.7 Likelihood of returning to Bridlington during the next two years?

The majority of visitors to Bridlington stated they would be very likely to return to the area during the next two years. This is slightly above the Regional Visitor Survey average of 68%. Only 1% stated they were not at all likely to make a return trip to the area during this period.

Table 4.5: How likely are you to return to this area in the next two years?

	Bridlington	Regional VS
Very likely	71%	68%
Quite likely	24%	20%
Not very likely	3%	5%
Not at all likely	1%	2%
Don't Know	1%	4%

4.8 Likelihood of Recommending Destination

Visitors were asked to rate the likelihood of recommending Bridlington to others.

The majority (98%) of visitors were likely to recommend a visit to Bridlington. This is higher than the regional, all resorts and all destinations percentages, where 93%, 89% and 88% of visitors respectively would recommend a visit.

These results suggest that Bridlington is meeting the expectation of its visitors. A recommendation to visit the town is a positive indication that generally visitors are happy with the destination and, therefore, are more likely to recommend a visit to others.

Table 4.6: Likelihood of recommending destination

	Bridlington	Regional VS	All Resorts	All Destinations
Base	*396*	*5489*	*7*	*26*
Very likely	82%	72%	61%	58%
Quite likely	16%	21%	29%	30%
Neither	-	-	8%	9%
Not very likely	3%	5%	1%	2%
Not at all likely	0%	2%	1%	1%

4.9 Length of Stay

Visitors were asked how long their whole trip was and how long they envisaged staying overnight in Bridlington. Of all visitors staying overnight in Bridlington, the average number of nights spent in the town was **6.4 nights**. This is longer than the regional and all destinations averages of **5.2** and **5.7 nights** and on a par with the all resorts average of **6.5 nights**.

Table 4.7: Length of stay		
	Bridlington	**Regional VS**
	84	
1 to 3 nights	33%	49%
4 to 7 nights	53%	40%
8 to 14 nights	10%	8%
15-21 nights	1%	1%
21+ nights	2%	1%
Total	99%	100%

NB: Totals do not add up to 100% due to rounding

Of the 84 visitors who stayed overnight in Bridlington, over half (53%) were staying in the area for a holiday of 4- 7 nights, higher than the regional average of 49%. Overall, two thirds (66%) of visitors were staying in the town for 4 or more nights, compared to a 51% average across the region. The nature of the destination is likely to account for the appeal of a longer stay holiday rather than the short break market of 1-3 nights.

5. Accommodation

5.1 Accommodation Use

84 visitors (21%) indicated they were staying overnight in Bridlington. Of these, 67% were using some form of paid accommodation. This is on a par with the regional visitor survey but lower when compared with the all resorts and all destination averages of 77% and 69% respectively.
In terms of commercial accommodation, B&B/guesthouses and hotels were the most popular forms of accommodation, used by 31% of staying visitors.

Table 5.1: Type of Accommodation

	Bridlington	Regional VS	All Resorts	All Destinations
Base	*84*	*2149*	*30*	*31*
Total Paid Accommodation	67%	66%	77%	69%
Hotel/Guesthouse/Inn/B&B	31%	38%	45%	45%
Self Catering Cottage	14%	9%	12%	6%
Static Caravan	11%	7%	8%	6%
Touring Caravan/Camping	11%	10%	6%	5%
Other paid accommodation	0%	2%	6%	7%
Total Free Accommodation	34%	34%	22%	31%
Friends/relatives home/second home	11%	25%	12%	30%
Free camping/caravan	19%	8%	0%	0%
Own second home/static caravan	4%	1%	7%	1%
Other	0%	0%	3%	0%
	101%	100%	100%	100%

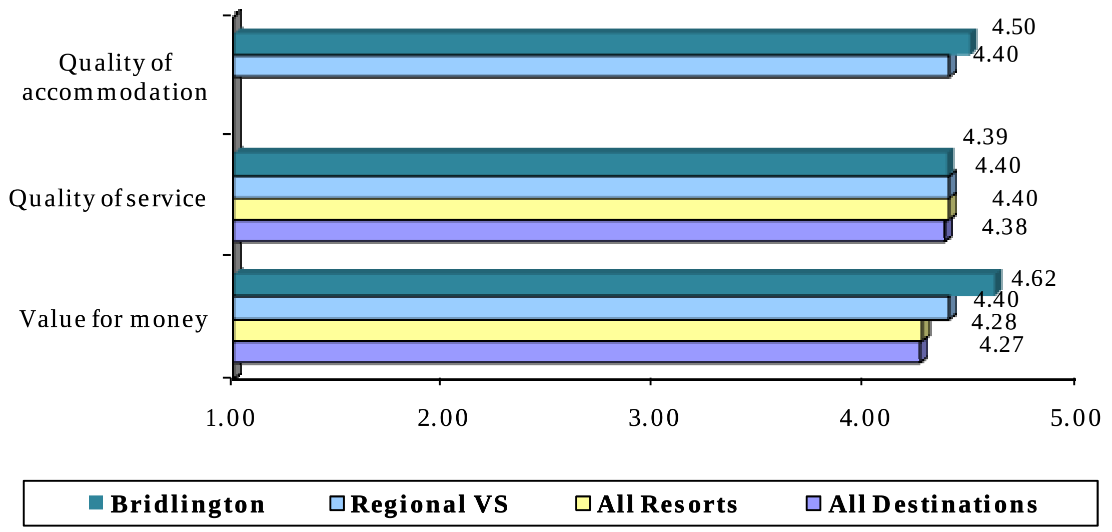
NB: Totals add up to more than 100% due to rounding

Use of a free caravan or camping was the highest form of free accommodation used by visitors to Bridlington (19%), much higher than its comparators. Staying with friends or relatives accommodation was used by just over a tenth (11%) of visitors to Bridlington, much lower than the regional visitor survey and all destinations.

5.2 Ratings of Commercial Accommodation

Visitors who were staying in commercial accommodation within Bridlington (50) were asked to comment on the quality of the accommodation, the customer service received and value for money provided by the accommodation establishment.

Figure 5.1: Opinions on Commercial Accommodation



The quality of accommodation in Bridlington was rated slightly higher than the regional average at 4.50, compared with 4.40, with 96% of visitors rating the customer service as good (56%) or very good (40%).

The rating for quality of service at the accommodation was on a par with all three comparators, with 96% of visitors rating this as good (56%) or very good (40%).

Value for money was the highest rated aspect of accommodation, rated at 4.62, with 94% of visitors considering it to be good (26%) or very good (68%). This rating was above the regional average and both the national comparators.

Table 5.2: Visitor opinions on Customer Service		
	Bridlington	Regional VS
Base	*44*	*1301*
Very good	45%	54%
Good	48%	32%
Satisfactory	7%	10%
Poor	-	3%
Very poor	-	1%

Table 5.3: Visitor opinions on quality of accommodation				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*50*	*1268*	*8*	*28*
Very good	56%	56%	51%	54%
Good	40%	33%	34%	33%
Satisfactory	2%	8%	11%	11%
Poor	2%	2%	3%	2%
Very poor	-	1%	1%	1%

Table 5.4: Visitor opinions on value for money at accommodation				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*50*	*1304*	*9*	*29*
Very good	68%	57%	53%	50%
Good	26%	31%	29%	33%
Satisfactory	6%	9%	14%	15%
Poor	0%	3%	3%	3%
Very poor	0%	1%	1%	1%

5.3 Star rating of hotel used

Those visitors who had stayed in hotel accommodation in Bridlington were asked for the rating of the hotel they had used. 13 respondents had used hotel accommodation on their trip to the town. 5 respondents had used a 3 Star hotel. 2 had used a 4 Star and only 1 had stayed in a 2 Star hotel. 5 respondents did not know what star rating their hotel was.

5.4 Booking of accommodation

Overnight visitors to Bridlington were asked to comment on how they had booked their accommodation. Almost half (49%) had booked directly with their establishment (by phone), and a further 12% had book via the providers website. Similarly, these 2 methods of booking were also the most popular in the Regional Visitor Survey.

Table 5.6: Booking of accommodation

	Number of Respondents	Bridlington	Regional VS
Over the phone directly with accommodation	53	49%	37%
Via Accommodation provider website	13	12%	24%
Through a travel agent	4	4%	3%
On arrival face-to-face/just turned up	21	19%	9%
Through a tour operator	2	2%	4%
Via other internet website	8	7%	14%
Other	8	7%	8%
Unsure/can't recall	5	5%	2%
Through a TIC	-	-	3%
Email	-	-	1%
Total	**114**	**105%**	**105%**

NB: Totals add up to more than 100% as more than one response could be given

The 13 respondents who had booked accommodation via the providers own website specified the website they had used. These included; cottage websites (3), Holiday Inn (2), hotel/hotel chain (1%), camp/caravan sites (3) and a local accommodation website (3). 1 respondent did not provide an answer.

Only 8 respondents had used other websites and these included: Google (1), camping/caravan organisation (2) and "other" (2). 3 respondents did not give the name of the website they had used.

Those who had booked their accommodation by "other" means included; newspaper/magazine offer (4), on a permanent arrangement (3) and through a club/society (1).

6.0 Sources of Information

6.1 Holiday making decision

Survey respondents were shown a show card, and asked if any of the following had influenced their decision to visit Bridlington before their arrival and similarly, if any had influenced their decision to visit this location/area during their visit.

Table 6.1: Holiday Making Decision

	Bridlington		Regional VS	
	Before Arrival	During Visit	Before Arrival	During Visit
Previous experience/local knowledge	84%	77%	58%	48%
Recommendation/word of mouth	22%	11%	27%	23%
By chance/an opportunity presented itself	7%	3%	13%	11%
Convenient location/easy to get to	6%	3%	6%	3%
Leaflets	4%	8%	7%	12%
Tour operator/organised package/travel agent	3%	2%	1%	1%
Other	2%	2%	15%	9%
Other internet website	2%	1%	8%	3%
www.yorkshire.com website	2%	0%	2%	1%
Newspaper/magazine article/advert	2%	1%	3%	0%
Tourist Information Centre	2%	5%	2%	4%
Specialist activity magazine	1%	1%	2%	1%
Welcome to Yorkshire holiday guide	1%	0%	0%	0%
Special offer	1%	0%	2%	1%
Guidebook/directory	0%	-	2%	1%
Local holiday guide	-	-	0%	0%
TV/Radio programme	-	-	2%	1%
Self-catering/cottage agency	-	-	0%	0%
E-newsletter	-	-	0%	0%
Any other items in the post	-	-	0%	0%
Total	139%	114%	150%	119%

NB: Totals add up to more than 100% as multiple responses could be given

Previous experience/local knowledge was the primary influence for the visitor both before and during their visit, reflective of the high proportion of repeat visitors to the town. Recommendation/word of mouth was noted by 22% of visitors as an influence on their holiday making decision before their visit. This is reflective of the high percentage of visitors who stated they would be likely to recommend Bridlington as a destination to visit (96%).

Use of leaflets during their visit was higher across the region compared with Bridlington (12% compared with 8%).

Only a small percentage had used other websites before visiting Bridlington. 3 stated information website, with options including use of the attractions own website and Google search engine. The remaining respondents did not give a website name.

Those respondents who had used a Tourist Information Centre (19) were asked to name the TIC they had used during their visit. Not surprisingly, the majority (16) had visited the TIC in Bridlington with 1 visitor respectively using York, Scarborough and Hull. 6 respondents did not state which TIC they had used.

Similarly, only a small amount had used other sources that had influenced them during their visit. Visiting friends and relatives (4), cultural/special event, school trip/training, map and membership of an organisation were noted by 1 respondent respectively.

7.0 Activities undertaken

7.1 Activities undertaken in Bridlington

Visitors were shown a "show card" listing a range of activities and asked to indicate which had been the **MAIN** activity that they had been involved in whilst in the town. Along with their main activity, respondents were also asked to specify all other activities they had undertaken or intended to undertake.

The table below indicates that to stroll around and enjoy the ambience of the town (33%) was the **main** activity, cited by one third (33%) of visitors to Bridlington (17% in regional visitor survey).

Table 7.1: Activities

	Bridlington		Regional VS	
	Have/intend (all)	Main Activity Undertaken	Have/intend (all)	Main Activity Undertaken
Stroll around and enjoy the ambience of city/town/village	**74%**	**33%**	59%	17%
Visiting natural attractions e.g. coastline	**2%**	**21%**	25%	7%
Visiting historic houses and gardens – heritage sites	**-**	**18%**	31%	13%
Short walk – up to 2 hours	**28%**	**7%**	36%	5%
Eating and drinking out	**58%**	**4%**	62%	2%
Visiting friends/relatives	**7%**	**3%**	15%	9%
Other	**7%**	**3%**	15%	8%
Long walk – over 2 hours	**6%**	**3%**	11%	4%
Visiting family/theme park or activities park	**1%**	**2%**	7%	3%
None	**2%**	**2%**		
Shopping e.g. arts, crafts, clothes	**35%**	**1%**	40%	2%
Passive beach activities – sunbathing	**10%**	**1%**	11%	1%
Spectator at sporting event/match e.g. football	**1%**	**0%**	1%	0%
Attend a festival or outdoor event	**1%**	**0%**	7%	5%
Active beach activities – games/swimming	**3%**	**0%**	6%	2%
Attending business/ conference meeting	**0%**	**0%**	0%	0%

Golf	**1%**	**0%**	1%	0%
Driving around and sightseeing from car	**14%**	-	23%	1%
Visit cultural visitor attractions e.g. museums	**1%**	-	32%	15%
Water sports, sailing/wind surfing	**1%**	-	1%	0%
Wildlife watching e.g. birdwatching	**2%**	-	11%	3%
Visiting canals/waterways	**1%**	-	5%	1%
Attend a cultural performance e.g. theatre	**1%**	-	1%	0%
Horse riding	**-**	-	0%	-
Mountain biking/cycling	**-**	-	2%	0%
Fishing	**2%**	-	1%	0%
Evening entertainment e.g. music concert	**1%**	-	2%	1%

Only 4% of visitors in Bridlington indicated their main activity as eating and drinking, compared with 58% who stated they had or intended to eat/drink whilst on their visit. This shows that whilst eating and drinking is not cited as a main activity, it still forms an important part of the overall visit, contributing to the local economy.

The second highest main activity in Bridlington was visiting natural attractions/coastline (21%) of visitors. This was higher than the regional visitor survey where only 7% had cited this as their main activity.

Respondents who indicated that they would be visiting an historic house/garden/heritage site/castle/church were asked to name the property they would visit. 88% had or were visiting Sewerby Hall, 7% Burton Agnes and 1% The Deserted Village. It should be noted that 30% of the interviews conducted for the Bridlington survey were at Sewerby Hall. Only a small number (7) gave a response to visiting a museum or cultural attraction (most of which were outside of Bridlington itself) with 1 each visiting the National Railway Museum, The Deep, Eden Camp, the Maritime Museum and the Dracula Museum. These responses reflect the high proportion of touring visitors in Bridlington (i.e. 21% were staying overnight elsewhere in Yorkshire).

Only 4 respondents had visited a festival, of which 2 had visited a car exhibition, 1 a music festival and 1 did not specify the name of the festival they had attended.

7.2 Which areas have you or are you going to visit in Yorkshire

Visitors were shown a list of areas within Yorkshire and asked to specify any areas, including their current location they had visited or were planning to visit during this trip. After East Riding, the most popular area visitors had visited or intended to visit was Kingston upon Hull, 18% and Scarborough, 16%, reflective of geographical proximity. The most popular area visitors had or intended to visit in the regional survey was York and Scarborough, noted by 14% of respondents respectively, while only a low proportion of all visitors to the region had visited/planned to visit Hull.

Table 7.2: Which areas have your or are you going to visit in Yorkshire?

	Bridlington		Regional VS	
	No. Of Respondents	%	No. Of Respondents	%
East Riding of Yorkshire	401	100%	597	10%
Kingston Upon Hull	21	18%	200	3%
Scarborough	65	16%	792	14%
York	19	5%	816	14%
Ryedale	4	1%	432	8%
Leeds	3	1%	522	9%
Bradford	2	1%	354	6%
Sheffield	2	1%	379	7%
Selby	2	1%	74	1%
Harrogate	1	0%	677	12%
North Lincolnshire (e.g. Scunthorpe	1	0%	174	3%
North East Lincolnshire (e.g. Grimsby)	1	0%	297	5%
Craven	1	0%	300	5%
Rotherham	1	0%	298	5%
Barnsley	0	-	396	7%
Doncaster	0	-	344	6%
Richmond	0	-	358	6%
Calderdale	0	-	150	3%
Wakefield	0	-	210	4%
Hambleton	0	-	281	5%
Kirklees	0	-	330	6%

7.3 Description of area/location

Visitors were shown a list of key words and asked to select one word that, in their view, described the area. The most popular 2 key words, noted by almost one fifth of respondents was relaxing and friendly. This is similar to the Regional Visitor Survey, where again the most popular key word was friendly, noted by 13% of visitors.

Table 7.3: Which one key word best describes this area/location?

	Bridlington	Regional VS
Relaxing	18%	11%
Friendly	18%	13%
Traditional	13%	10%
Peaceful	11%	10%
Comfortable	9%	4%
Natural	8%	11%
Old Fashioned	7%	4%
Fun	5%	8%
Breathtaking	3%	7%
Exciting	2%	4%
Inspirational	1%	7%
Rugged	1%	1%
Don't Know	1%	1%
Quirky	0%	1%
Unexciting	0%	0%
Uninviting	0%	0%
Contemporary	0%	2%
Proud	0%	1%
Bleak	-	0%
Industrial	-	2%
Undynamic	-	0%

Traditional and peaceful were also popular key words indicated by visitors in both Bridlington and the region as a whole.

8.0 Mode of Transport

8.1 Main Form of Transport Used

In most visitor surveys, the principal mode of transport used to arrive at a visitor destination is the car. The national average is 71% use of the car (UKTS 2008). Private vehicles (such as cars, vans, motorcycles and motor homes) were the main form of transport used by 89% of visitors to Bridlington. This is slightly above the regional average (86%) and significantly above the all resorts (68%) and all destinations (61%). The use of public transport to arrive in Bridlington (5%) is considerably lower than its two comparators (11% and 14% respectively).

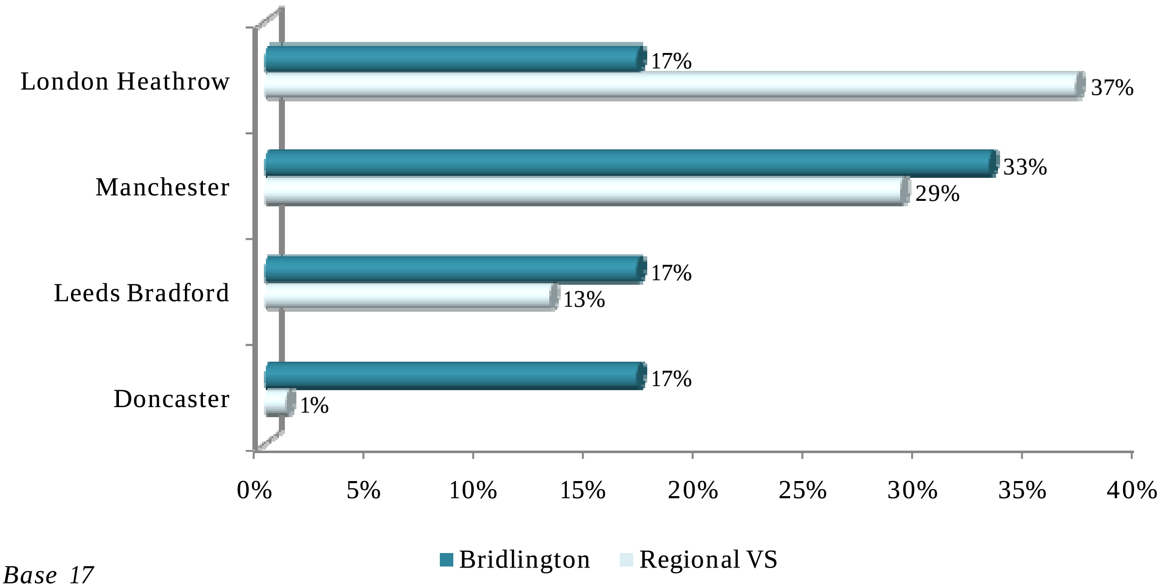
	Bridlington	All Resorts	All Destinations
Car/Van/Motorcycle/Motor home	89%	68%	61%
Public bus/coach service	5%	11%	14%
Walked	0%	5%	5%
Train	0%	7%	12%
Bicycle	0%	0%	0%
Other	1%	1%	2%
Coach tour/special excursion	5%	8%	6%
Total	100%	100%	100%

Whilst in Bridlington, the main mode of transport for both day and staying visitors was walking.

8.2 Arrive via an airport or port

Visitors to Bridlington were asked if they had travelled from afar, did they arrive via an airport. Only 6 respondents stated they had arrived via an airport and these visitors were asked to specify which airport.

Figure 8.1: UK Airport of Arrival



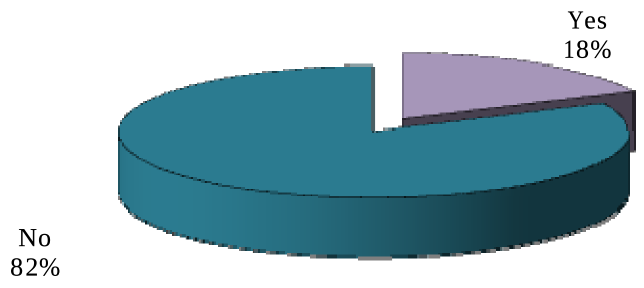
Base 17

9.0 Disability, mobility problems or illness

9.1 Serious illness or disability

Visitors were asked if they had any disability, mobility problems or illness which could impact on their trip to Bridlington. 18% of visitors stated they had a serious illness or disability which could impact on their visit to the town.

Figure 9.1: Serious illness or disability



The 18% of respondents who stated they did have a disability, mobility problem or serious illness where asked what type of disability they had or what type of disability a member of their party had.

71% of respondents in Bridlington stated they had a mobility impairment, compared with a higher proportion of respondents in the Regional Visitor Survey. Similarly, 63% of the travelling group had a mobility impairment, compared with a slightly higher proportion of party members in the Regional Visitor Survey.

Table 9.1: What type of disability do either you or a member of your travelling party suffer from?				
	Bridlington		Regional VS	
	Respondent	Member of party	Respondent	Member of party
A mobility impairment (non wheelchair user)	60%	63%	63%	65%
Long-term illness (e.g. AIDS, arthritis, cancer, diabetes)	22%	34%	34%	23%
Learning difficulties	0%	1%	4%	11%
Deafness	5%	5%	4%	6%
Blindness	0%	1%	1%	1%
Partial sight	0%	0%	2%	2%
Partial hearing loss	0%	1%	2%	4%

9.2 Rating on ease of accessibility within location/attraction

Visitors were asked to rate on a scale of 1-5 (1 being very poor and 5 very good) how accessible they felt the location/attraction they were interviewed at was.

Table 9.2: How would your party rate ease of accessibility within this location/attraction?		
	Bridlington	Regional VS
Very good	19%	28%
Good	36%	43%
Satisfactory	11%	16%
Poor	1%	5%
Very poor	4%	0%
Don't Know	28%	8%

Just over half (55%) visitors felt the ease of access at the location/attraction was good (36%) or very good (19%), below the Regional Visitor Survey rating of 71%.

9.3 Rating on ease of accessibility within Bridlington

Respondents were then asked to provide a rating for the ease of accessibility within Bridlington itself. 33% stated they didn't know. Of those visitors who did supply a rating, almost half (48%) rated the ease of accessibility within Bridlington as good (31%) or very good (13%).

Table 9.3: How would your party rate ease of accessibility within Bridlington?

	Bridlington
Very good	13%
Good	31%
Satisfactory	22%
Poor	1%
Very poor	-
Don't Know	33%

10.0 EXPENDITURE

10.1 Visitor Expenditure in Bridlington

Visitors were asked to estimate how much they and their party were likely to spend during the day of the interview. This included expenditure incurred on behalf of others, i.e. friends/relatives. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as estimates. Studies using the diary method of keeping account of spending have shown that visitors' own estimates are usually on the conservative side.

Visitors were asked to give a breakdown of their total expenditure according to the following categories:

- Accommodation
- Travel and transport in and around the area
- Food and drink
- Admission at attractions/other recreational spend
- Shopping
- Evening entertainment
- Other

The information on visitor expenditure in the local economy can be used as an indicator of the economic impact of all the visitors. The table below shows the breakdown of all visitor segments' expenditure by sector compared with the regional average.

Table 10.1: Spend Per Person

Spend Categories	Expenditure Per Person					
	Bridlington			Region		
	All	Day	Staying	All	Day	Staying
Travel	£4.76	£4.69	£4.85	£5.60	£4.41	£7.46
Food and drink before 5pm	£5.07	£4.96	£5.21	£4.71	£4.24	£5.45
Food and drink after 5pm	£1.73	£0.59	£3.30	£2.55	£0.87	£5.17
Attractions	£1.62	£1.54	£1.73	£2.67	£2.78	£2.51
Other leisure	£1.33	£1.81	£0.66	£0.36	£0.26	£0.50
Shopping	£4.34	£5.35	£2.94	£4.08	£3.51	£4.96
Evening entertainment	£0.03	£0.02	£0.04	£0.55	£0.59	£0.49
Other expenses	£1.33	£1.81	£0.66	£0.16	£0.16	£0.18
Total (exc accom)	£18.64	£18.73	£18.53	£20.68	£16.83	£26.72
Accommodation	£21.32	-	£21.32	£30.05	-	£30.05
Total (including accomm)	£24.62	-	£32.79	£27.16	-	£43.31

In total, the average expected expenditure per person by visitors to Bridlington was £24.62, slightly below the regional average. In general, expenditure was lower on attractions, food and drink after 5pm and travel.

Comparing day and staying visitors, average day visitor expenditure in Bridlington was slightly higher than the regional average, largely accounted for by greater spend on leisure activities. Meanwhile staying visitor expenditure was lower than the regional average with visitors spending less on food and drink after 5pm.

The table below shows average spend per person compared to the national indicator for all resort destinations. Spend in Bridlington came out slightly lower in all areas.

Table 10.2: Spend per person per day		
Spend Categories	**Expenditure Per Person Per Day**	
	Bridlington	*All Historic Towns*
Travel per person	£4.76	£2.61
Food and Drink Total Per Person	£6.78	£8.36
Attractions and Entertainment Total per person	£2.96	£3.03
Shopping per person	£4.34	£7.16
Other expenses per person	£1.33	-
Accommodation (commercial only)	£21.32	£21.76

Staying visitors were asked to state approximately how much they expected to spend on one nights' accommodation in Bridlington. Of the 84 people staying overnight in Bridlington, 57 were staying in some form of commercial accommodation and expected to spend approximately £21.32 for one nights' stay. This was on a par with the national comparator for all report destinations but below the regional average.

11. VISITOR OPINIONS

11.1 Introduction

The following section of the report presents the average opinion scores of visitors to Bridlington on a range of factors which together comprise the 'visitor experience'. These are analysed alongside the average rating for the region, along with the national 'all resorts' and 'all destinations' scores to give a benchmark comparison. Some of the national benchmarking questions were not asked on the Bridlington and regional survey and therefore comparisons are only shown where possible.

11.2 Overview

Figure 6.1 shows the average opinion scores for all benchmarked indicators.

Most scores are above the 'average' of 3.00 on the five point scale. The highest scoring indicators relate to the TIC; with the usefulness of information received achieving the highest rating in the survey of 4.65. The quality of service was rated at 4.58 and the ease of finding received a rating of 4.31. The next highest rated indicators relate to accommodation, with the value for money at accommodation rated at 4.62. The quality of accommodation was rated at 4.50 and the quality of service at 4.39. The overall opinions of Bridlington also scored high with the feeling of welcome achieving a rating of 4.28; general atmosphere rated at 4.21 and the general appearance was rated at 4.17. The quality of service at attractions (4.43) and the value for money at attractions (4.38) were also rated high (4.70). The ease of finding way around using road signs and pedestrian signs achieved ratings of 4.29 and 4.27 respectively.

The lowest scores received were for the range of shops (3.45), the quality of goods and the quality of service (3.64 and 3.87 respectively). All the ratings for the markets were fairly low as were ratings for the availability and cleanliness of public toilets. The cost of parking and availability of parking also rated low at 3.47 and 3.76 respectively.

Table 6.1 details these scores for Bridlington alongside the county and all market towns averages. Indicators marked in bold are those where Bridlington performed better than the county and all market towns. Those scores shown in italics indicate where Bridlington is lower than both comparator scores.

Figure 11.1: Opinion Scores - All Factors

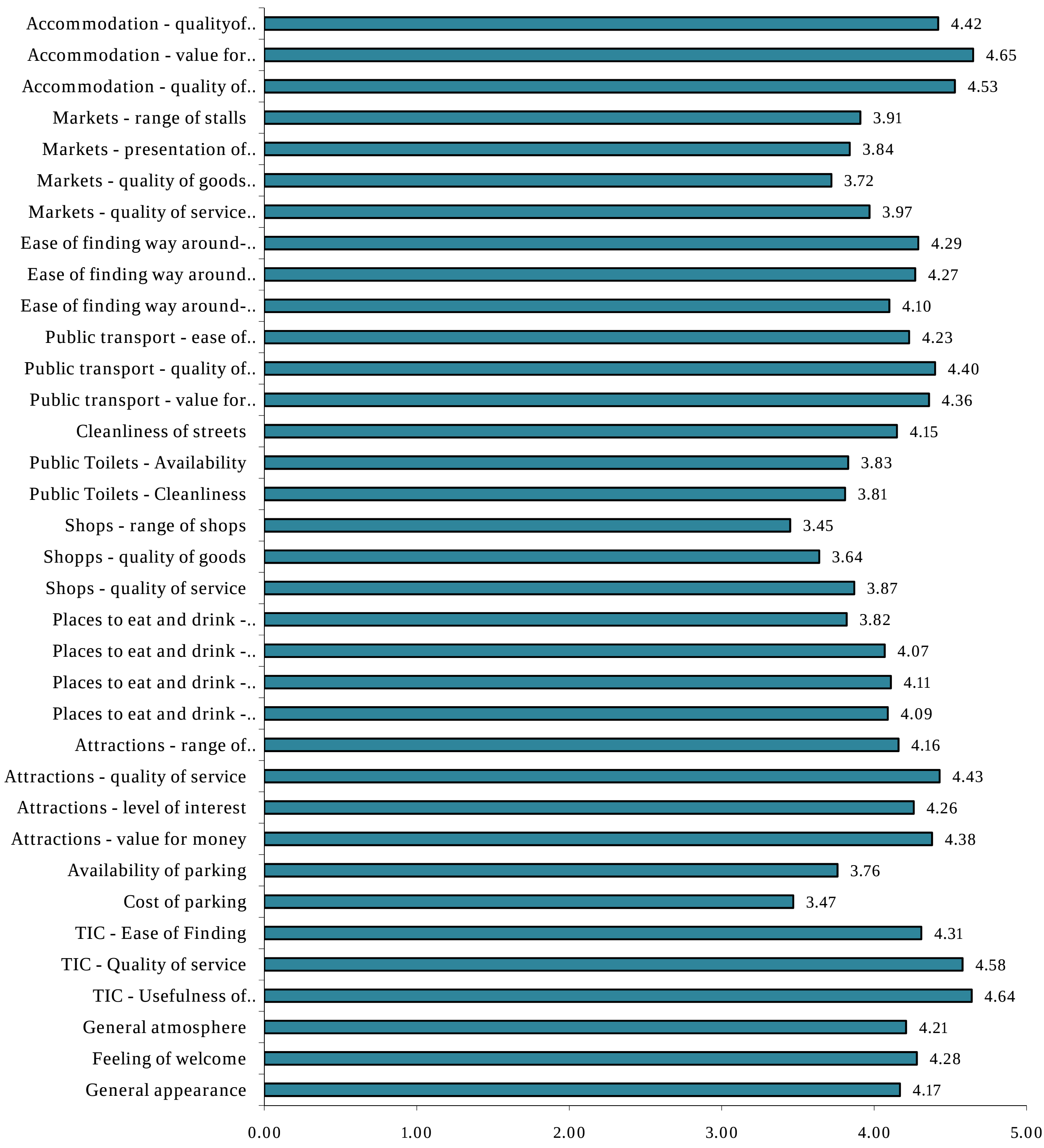


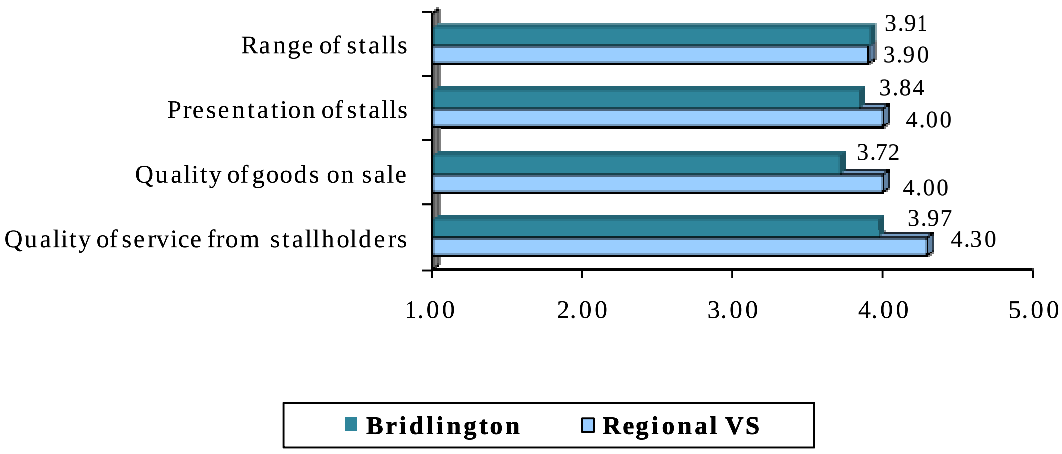
Table 11.1	Bridlington	Regional VS	All Resorts	All Destinations
Accommodation - quality of service	**4.39**	4.40	4.31	4.38
Accommodation - value for money	**4.62**	4.40	4.28	4.27
Accommodation – quality of accommodation	4.50	4.40	-	-
Markets – range of stalls	3.91	3.90	-	-
Markets – presentation of stalls	*3.84*	4.00	-	-
Markets – quality of goods on sale	*3.72*	4.00	-	-
Markets – quality of service from stallholders	*3.97*	4.30	-	-
Ease of finding way around - road signs	**4.29**	4.10	4.26	4.07
Ease of finding way around - pedestrian signs	**4.27**	4.10	4.24	4.11
Ease of finding way around - display maps and info boards	4.10	4.10	4.19	4.04
Public transport – ease of access/convenience	*4.23*	4.40	-	-
Public transport – quality of service	4.40	4.40	-	-
Public transport – value for money	4.36	4.30	-	-
Cleanliness of streets	4.15	4.30	4.21	4.04
Public Toilets - Availability	*3.83*	4.20	3.79	3.58
Public Toilets - Cleanliness	*3.81*	4.10	3.84	3.72
Shops - range of shops	3.45	4.00	4.06	4.17
Shops - quality of goods	3.64	4.10	4.02	4.13
Shops - quality of shopping environment	-	-	4.21	4.13
Shops - quality of service	3.87	4.20	4.07	4.11
Places to eat and drink - range	3.82	4.00	4.24	4.26
Places to eat and drink – quality of food	*4.07*	4.20	-	-
Places to eat and drink - quality of service	4.11	4.20	4.12	4.14
Places to eat and drink - value for money	**4.09**	4.00	4.05	3.99
Attractions - range of attractions	*4.16*	4.20	4.15	4.22
Attractions – quality of service	**4.43**	4.40	4.19	4.24
Attractions – level of interest	*4.26*	4.40	-	-
Attractions – value for money	**4.38**	4.30	4.01	4.01
Ease of parking	-	-	4.21	4.11
Availability of parking	*3.76*	4.20	-	-
Cost of parking	*3.47*	3.90	3.33	3.06
TIC - Ease of Finding	*4.31*	4.40	4.13	4.22
TIC - Quality of service	**4.58**	4.50	4.45	4.47
TIC - Usefulness of Information received	**4.64**	4.50	4.47	4.50
General atmosphere	4.21	4.60	4.47	4.39
Feeling of welcome	4.28	4.60	4.47	4.35
General appearance	*4.17*	4.60	-	-

Bold = higher than all 3 comparator scores; Underlined=higher than the regional scores
Italics = lower than regional scores Grey shading = lower than all three comparator scores

11.3 Markets

Those visitors who had used the markets whilst on their trip were asked to comment on the range and presentation of stalls, quality of goods on sale and quality of service provided by the stallholders themselves. Only scores for Bridlington and the Region are shown below as national comparators are not available in this category.

Figure 11.2: Opinions on Markets



The quality of service provided by the stallholders received the highest score in the market category of 3.97, below the regional average at 4.30.

The quality of goods on sale at the market stalls received the lowest score overall for Bridlington, at 3.72.

The range of stalls (3.91) and the presentation of stalls (3.84) were both scored just below the regional averages of (3.90 and 4.00 respectively)

Table 11.2: Visitor opinions on range of stalls		
	Bridlington	Regional VS
Base	*32*	*516*
Very good	16%	28%
Good	63%	42%
Average	19%	20%
Poor	3%	9%
Very poor	-	1%

Table 11.3: Visitor opinions on presentation of stalls		
	Bridlington	Regional VS
Base	*32*	*520*
Very good	13%	31%
Good	63%	46%
Average	22%	17%
Poor	3%	5%
Very poor	-	1%

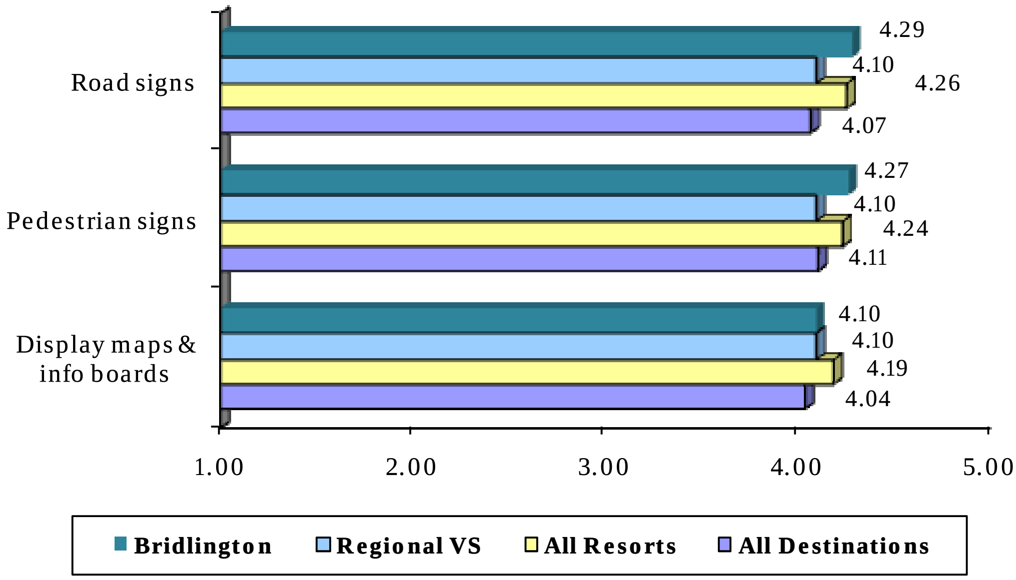
Table 11.4: Visitor opinions on quality of goods		
	Bridlington	Regional VS
Base	*32*	*508*
Very good	13%	34%
Good	50%	43%
Average	34%	16%
Poor	3%	6%
Very poor	-	1%

Table 11.5 Visitor opinions on quality of service from stallholders		
	Bridlington	Regional VS
Base	*32*	*454*
Very good	19%	47%
Good	63%	39%
Average	16%	11%
Poor	3%	2%
Very poor	-	1%

11.4 Ease of Finding Way Around

Visitors were asked to rate three aspects of finding their way around Bridlington: road signs, pedestrian signs and display maps and information boards. Given that just over 9 out of 10 (92%) visitors arrive in Bridlington by private vehicle, quality of road signs is likely to be a very important aspect of their visit.

Figure 11.3: Opinions on ease of finding way around



Road signs in Bridlington were rated at 4.29, above both the regional average and both the national comparator scores. 90% of visitors rated road signs as either good (49%) or very good (41%).

Pedestrian signs were again rated at 4.27, with almost 9 out of 10 (89%) rating these as good (49%) or very good (40%). A further 9% rated these as average.

Display maps and information boards in the town was the lowest rated aspect of ease of finding way around rated at 4.10. Over four fifths (83%) of visitors rated these as good (48%) or very good (35%).

Table 11.6: Visitor opinions on ease of finding way around – road signs				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*360*	*4319*	*9*	*29*
Very good	41%	37%	44%	36%
Good	49%	43%	43%	44%
Average	9%	13%	9%	13%
Poor	2%	6%	2%	5%
Very poor	0%	1%	1%	1%

Table 11.7: Visitor opinions on ease of finding way around – pedestrian signs				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*360*	*3543*	*9*	*29*
Very good	40%	34%	41%	35%
Good	49%	49%	46%	47%
Average	9%	14%	10%	13%
Poor	2%	3%	2%	3%
Very poor	0%	0%	0%	1%

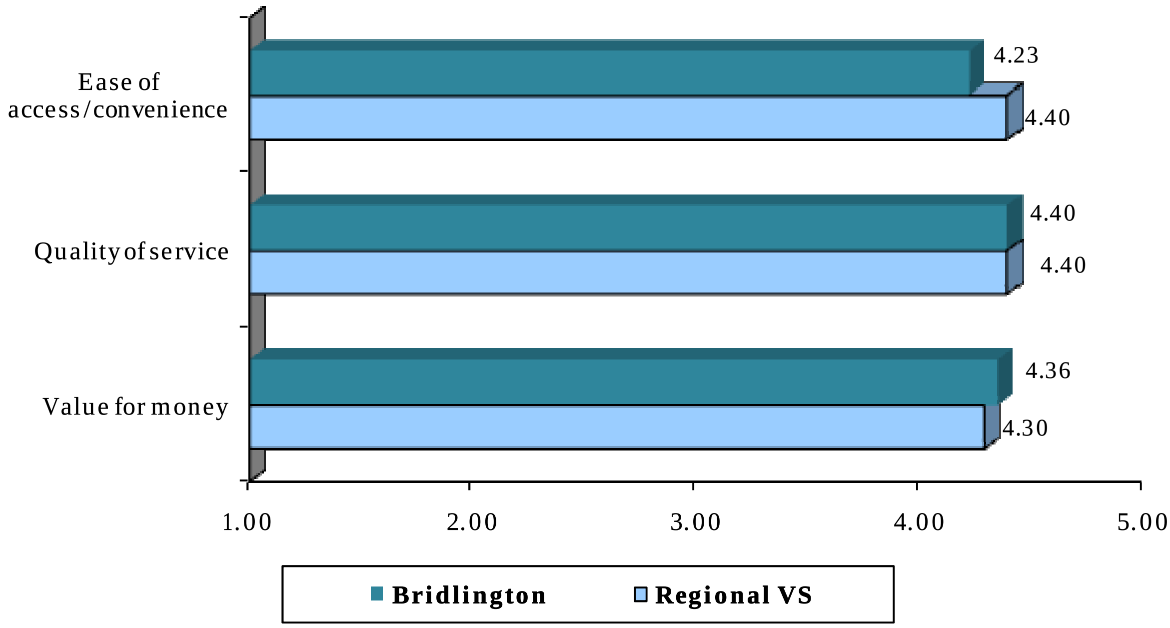
Table 11.8: Visitor opinions on ease of finding way around – display maps & info boards				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*360*	*3183*	*9*	*29*
Very good	35%	34%	41%	34%
Good	48%	47%	44%	45%
Average	9%	15%	11%	15%
Poor	6%	4%	3%	5%
Very poor	2%	1%	1%	1%

11.5 Public Transport

Opinions on public transport is not asked for the national benchmarking survey, therefore, the following is for the region and Bridlington only.

Visitors were asked to rate three aspects of the public transport facilities in Bridlington: ease of access/convenience, quality of service and value for money.

Figure 11.4: Opinions on public transport



Ease of access/convenience was the lowest rated aspect of public transport at 4.23, although over 9 out of 10 (92%) visitors still rated this as good (54%) or very good (38%).

Quality of service was the highest rated aspect of public transport at 4.40, with 96% of visitors rating this as good (48%) or very good (48%).

Value for money was rated at 4.36. 91% of visitors rated this aspect as good (43%) or very good (48%).

Table 11.9: Visitor opinions on ease of access/convenience		
	Bridlington	Regional VS
Base	*48*	*773*
Very good	38%	50%
Good	54%	41%
Average	4%	6%
Poor	2%	2%
Very poor	2%	1%

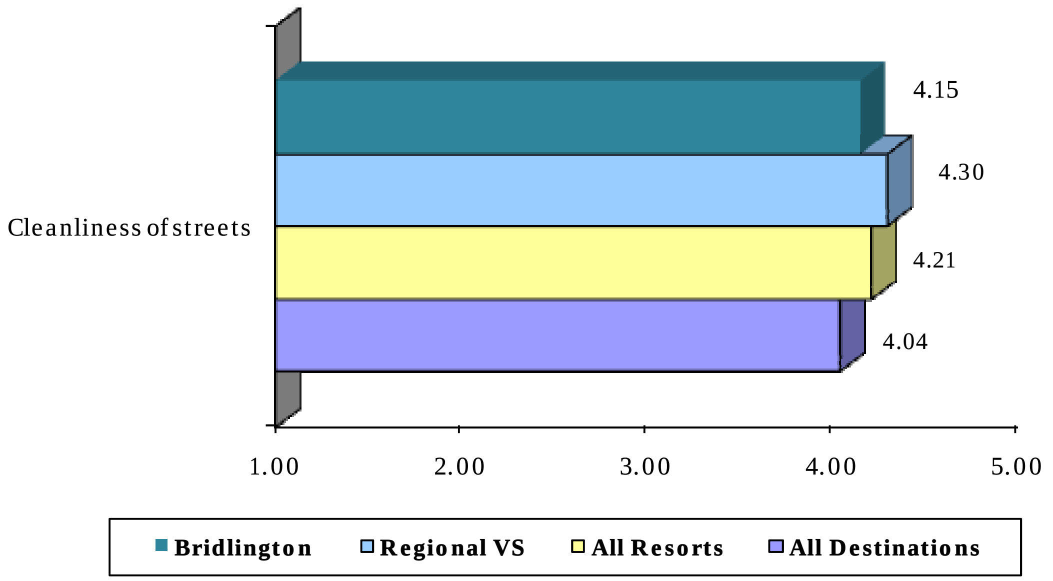
Table 11.10: Visitor opinions on quality of service		
	Bridlington	Regional VS
Base	*48*	*768*
Very good	48%	49%
Good	48%	41%
Average	2%	7%
Poor	-	2%
Very poor	2%	1%

Table 11.11: Visitor opinions on value for money		
	Bridlington	Regional VS
Base	*48*	*747*
Very good	48%	51%
Good	43%	34%
Average	7%	10%
Poor	2%	3%
Very poor	-	2%

11.6 Cleanliness of streets

Visitors were asked for opinions on the cleanliness of streets in Bridlington.

Figure 11.5: Cleanliness of streets



The cleanliness of streets rating of 4.15 is below the regional and all resorts averages, but above the all destinations average. Just under 8 out of 10 (79%) visitors rated cleanliness of streets as good (36%) or very good (43%) with a further 15% rating the cleanliness of streets as average.

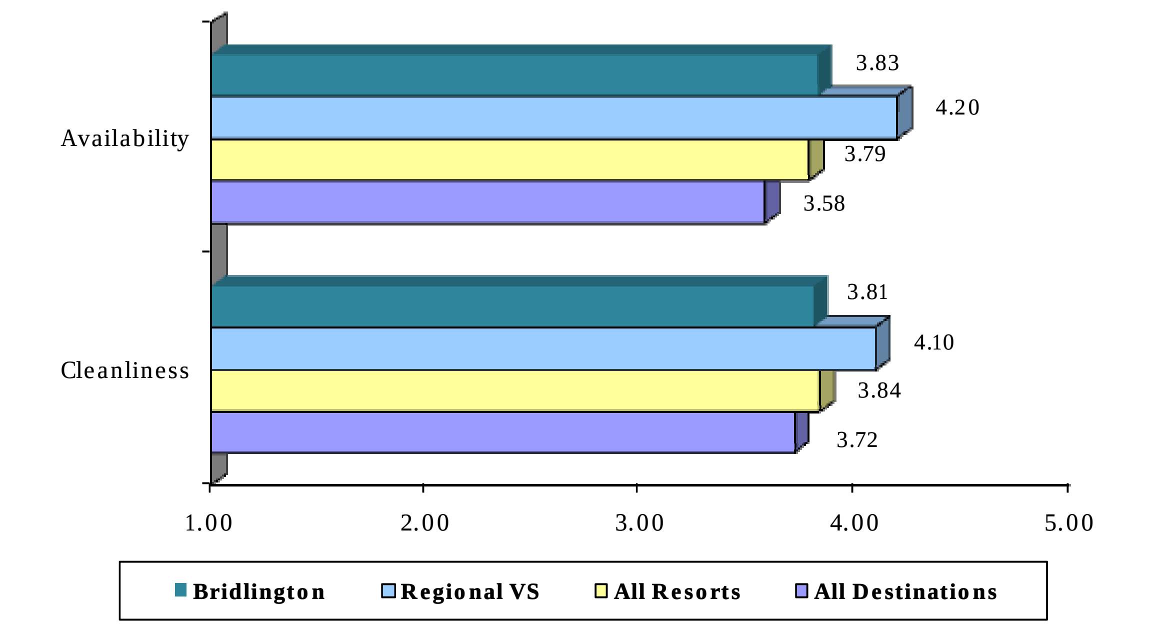
Table 11.12: Visitor opinions on cleanliness of streets

	Bridlington	Regional VS	All Resorts	All Destinations
Base	*392*	*4179*	*9*	*29*
Very good	43%	42%	43%	33%
Good	36%	44%	43%	45%
Average	15%	11%	12%	16%
Poor	6%	2%	3%	4%
Very poor	1%	1%	0%	1%

11.7 Public Toilets

Visitors were asked to give opinions on both the availability and cleanliness of public toilets in the town. Availability and cleanliness of public toilets were rated below the regional comparator score but above the national comparators.

Figure 11.6: Opinions on public toilets



Three quarters (75%) of visitors surveyed in 2009 described the availability of public toilets in Bridlington as good (53%) or very good (22%).

A slightly lower proportion of visitors (69%) rated the cleanliness of public toilets as good (46%) or very good (23%) with a further 22% rating it as average.

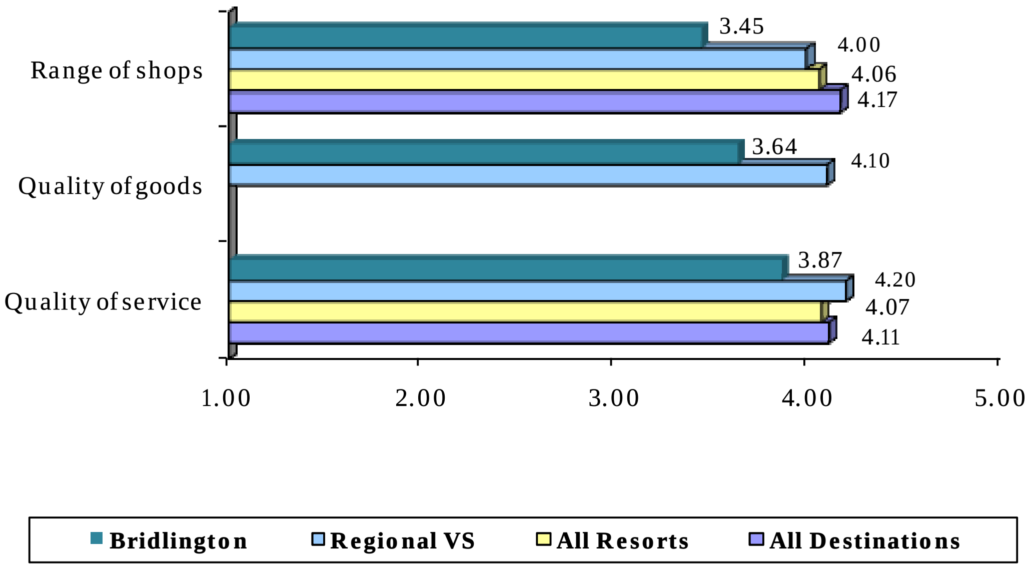
Table 11.13: Visitor opinions on availability of public toilets				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*392*	*3064*	*9*	*30*
Very good	22%	36%	35%	26%
Good	53%	49%	35%	35%
Average	15%	10%	14%	19%
Poor	7%	3%	9%	14%
Very poor	3%	1%	7%	6%

Table 11.14: Visitor opinions on cleanliness of public toilets				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*392*	*3074*	*9*	*30*
Very good	23%	36%	32%	27%
Good	46%	45%	37%	38%
Average	22%	13%	20%	22%
Poor	8%	4%	8%	9%
Very poor	1%	2%	3%	4%

11.8 Shopping

Visitors were asked to rate three aspects of the shopping experience in Bridlington: range of shops, quality of the goods and quality of service. Average scores for Bridlington were below all 3 comparator averages.

Figure 11.7: Opinions on Shopping



The range of shops in Bridlington received the lowest rating in the shopping category (3.45). Only 61% rated this aspect as good (54%) or very good (7%), with a further 24% rating the range of shops as average.

The quality of the goods on sale was rated at 3.64, with 67% rating this as good (53%) or very good (14%).

Quality of service was the highest rated aspect in the shopping category at 3.87. Almost three quarters (74%) of visitors rated this as good (51%) or very good (23%).

Table 11.15: Visitor opinions on range of shops				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*252*	*2252*	*9*	*30*
Very good	7%	27%	38%	41%
Good	54%	50%	41%	42%
Average	24%	18%	16%	14%
Poor	8%	4%	4%	2%
Very poor	8%	1%	1%	1%

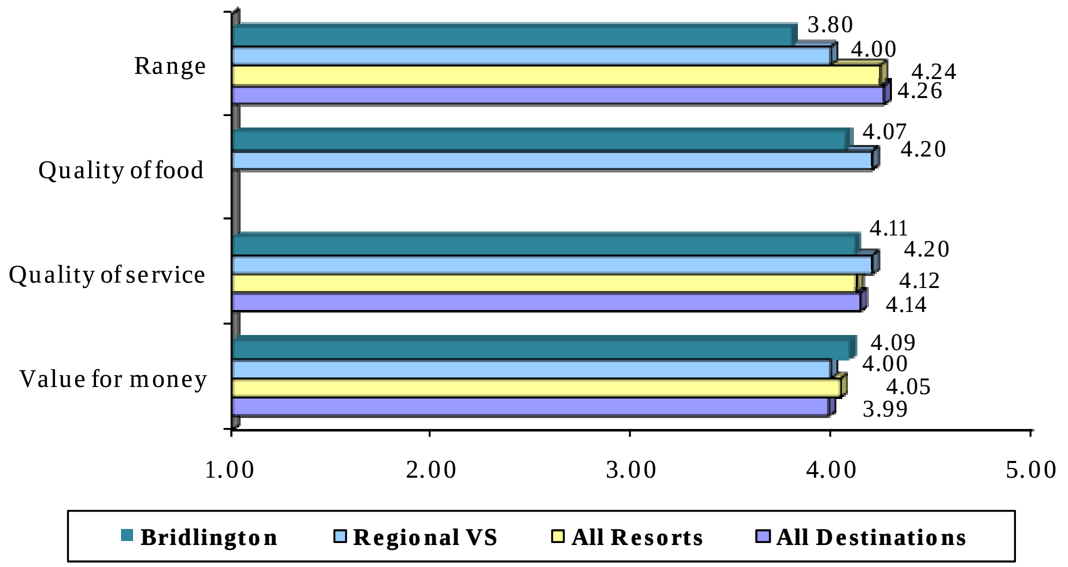
Table 11.16: Visitor opinions on quality of goods on sale		
	Bridlington	**Regional VS**
Base	*249*	*2255*
Very good	14%	32%
Good	53%	51%
Average	20%	15%
Poor	7%	2%
Very poor	5%	0%

Table 11.17: Visitor opinions on quality of service				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*239*	*2179*	*9*	*30*
Very good	23%	37%	33%	34%
Good	51%	49%	48%	48%
Average	18%	13%	17%	16%
Poor	3%	1%	2%	1%
Very poor	5%	0%	1%	0%

11.9 Places to Eat & Drink

Visitors were asked to rate three aspects of the eating and drinking facilities in Bridlington: range of places to eat or drink, quality of service and value for money.

Figure 11.8: Opinions on places to eat and drink



Range of places to eat and drink was rated at 3.80 below all 3 comparators. 70% of visitors rated this as good (50%) or very good (20%).

Quality of food was rated at 4.07, below the regional average. 83% of visitors rated this as good (562) or very good (27%).

Quality of service was the highest rated aspect of food and drink establishments rated at 4.11, again below all 3 comparator scores. 86% of visitors rated this as good (60%) or very good (26%).

Value for money was rated at 4.09, above all 3 comparator scores. 84% of visitors rated this aspect as good (57%) or very good (27%).

Table 11.18: Visitor opinions on range of places to eat & drink				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*306*	*3296*	*9*	*30*
Very good	20%	29%	46%	45%
Good	50%	50%	39%	42%
Average	23%	17%	12%	10%
Poor	7%	3%	3%	2%
Very poor	0%	1%	0%	0%

Table 11.19: Visitor opinions on quality of food		
	Bridlington	**Regional VS**
Base	*305*	*3248*
Very good	27%	35%
Good	56%	51%
Average	16%	12%
Poor	2%	1%
Very poor	0%	1%

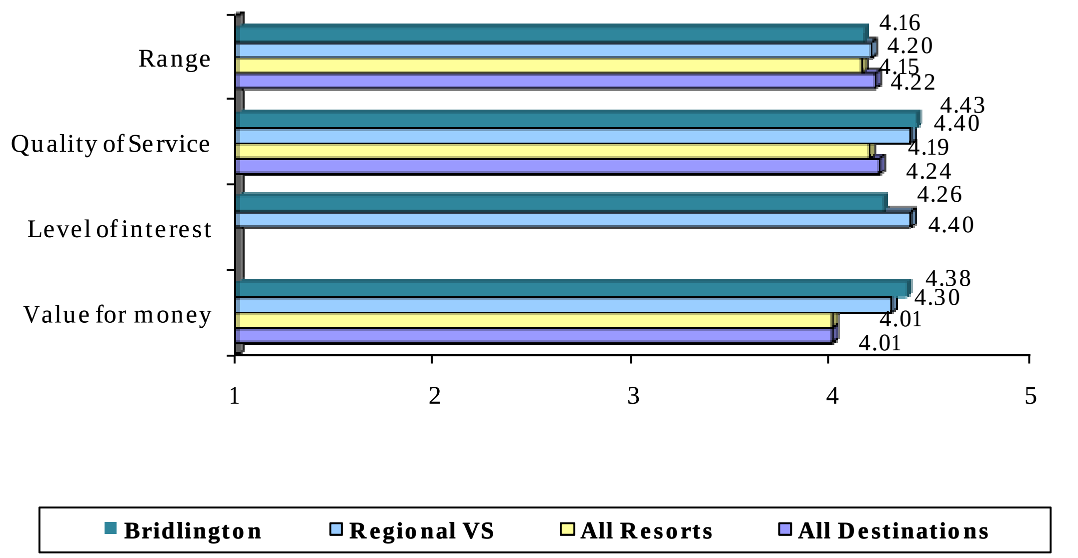
Table 11.20: Visitor opinions on quality of service				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*304*	*3312*	*9*	*30*
Very good	26%	36%	36%	35%
Good	60%	50%	47%	49%
Average	12%	12%	13%	13%
Poor	1%	1%	2%	2%
Very poor	0%	0%	1%	1%

Table 11.21: Visitor opinions on value for money				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*304*	*3311*	*8*	*29*
Very good	27%	30%	32%	29%
Good	57%	50%	47%	48%
Average	15%	16%	19%	20%
Poor	2%	4%	5%	4%
Very poor	-	1%	0%	1%

11.10 Attractions

Visitors who were staying in commercial accommodation within Bridlington (19 interviewees) were asked to comment on the quality of service and value for money provided by their accommodation establishment.

Figure 11.9: Opinions on Attractions



The range of attractions in Bridlington was the lowest rated aspect of the attractions category receiving a rating of 4.16. 84% of visitors rated the range of attractions in Bridlington as good (49%) or very good (35%).

Quality of service was rated 4.43, above the regional score and the 2 national comparator scores. 94% of visitors rating this as good (45%) or very good (49%).

Level of interest was not part of the national benchmarking survey but the score for Bridlington (4.24) was slightly below the regional score of 4.40. 85% of visitors rated the level of interest as good (45%) or very good (40%).

Value for money was rated fairly high at 4.38, above all 3 comparator scores, with 94% of visitors considering it to be good (50%) or very good (44%).

Table 11.22: Visitor opinions on range of attractions

	Bridlington	Regional VS	All Resorts	All Destinations
Base	*174*	*3526*	*9*	*30*
Very good	35%	38%	39%	41%
Good	49%	49%	43%	45%
Average	13%	11%	15%	12%
Poor	3%	2%	3%	2%
Very poor	0%	0%	0%	0%

Table 11.23: Visitor opinions on quality of service

	Bridlington	Regional VS	All Resorts	All Destinations
Base	*145*	*3596*	*8*	*29*
Very good	49%	47%	38%	39%
Good	45%	46%	48%	48%
Average	6%	6%	13%	12%
Poor	0%	0%	1%	1%
Very poor	0%	0%	0%	0%

Table 11.24: Visitor opinions on level of interest

	Bridlington	Regional VS
Base	*173*	*3763*
Very good	45%	48%
Good	40%	45%
Average	10%	7%
Poor	5%	1%
Very poor	-	0%

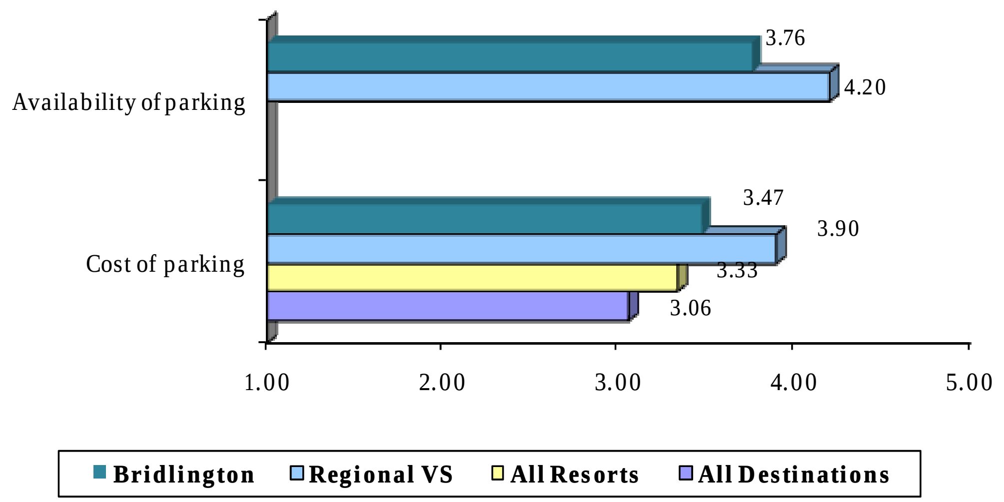
Table 11.25: Visitor opinions on value for money

	Bridlington	Regional VS	All Resorts	All Destinations
Base	*126*	*3162*	*7*	*26*
Very good	44%	46%	30%	30%
Good	50%	44%	44%	45%
Average	5%	8%	22%	21%
Poor	1%	2%	3%	4%
Very poor	-	0%	1%	0%

11.11 Car Parking

92% of all visitors to Bridlington arrived by private vehicle (car, van, motor home or motorcycle) and therefore parking would have been a significant factor of their visit.

Figure 11.10: Cost of parking



Availability of parking in Bridlington was rated below the regional score at 3.76, with 70% of visitors rating the availability as good (37%) or very good (33%).

Cost of parking in Bridlington was rated below the regional average at 3.47, but above both the national comparator averages. 59% of respondents rated cost of parking as quite reasonable (40%) or very reasonable (19%), with a further 21% rating the cost of parking in Bridlington as average.

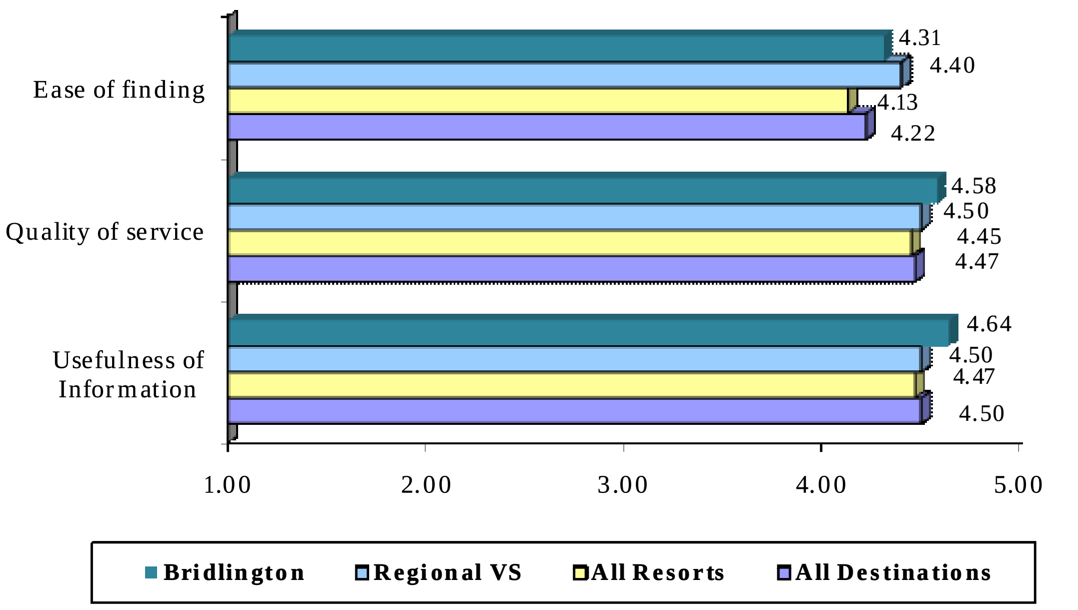
Table 11.26: Visitor opinions on availability of parking		
	Bridlington	**Regional VS**
Base	*285*	*4408*
Very good	33%	43%
Good	37%	41%
Average	11%	11%
Poor	10%	6%
Very poor	9%	1%

Table 11.27: Visitor opinions on cost of parking				
	Bridlington	**Regional VS**	**All Resorts**	**All Destinations**
Base	*215*	*3567*	*8*	*29*
Very reasonable	19%	38%	18%	15%
Reasonable	40%	31%	31%	27%
Average	21%	17%	29%	26%
Expensive	11%	11%	13%	17%
Very expensive	10%	3%	8%	15%

11.12 Tourist Information Centre

Almost one third (32%) of visitors had been to the TIC in Bridlington. These visitors were asked to rate the TIC in terms of ease of finding it, quality of service and the usefulness of information received. All aspects were rated above the 2 national comparator scores.

Figure 11.11: Opinions on the TIC



Opinions on the TIC were some of the highest ratings in the survey. Ease of finding the TIC was rated at 4.31. 9 out of 10 (90%) visitors rated the ease of finding the TIC as good (46%) or very good (44%).

Quality of service in the TIC was also rated higher at 4.58. Almost all respondents (96%) rated the quality of service as good (32%) or very good (64%).

Usefulness of information was the highest rated aspect in the whole survey rated at 4.64, with 98% rating this as good (32%) or very good (66%).

Table 11.28: Visitor opinions on ease of finding TIC				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*52*	*989*	*7*	*28*
Very good	44%	48%	50%	47%
Good	46%	42%	37%	37%
Average	8%	9%	8%	9%
Poor	0%	1%	3%	5%
Very poor	2%	0%	2%	1%

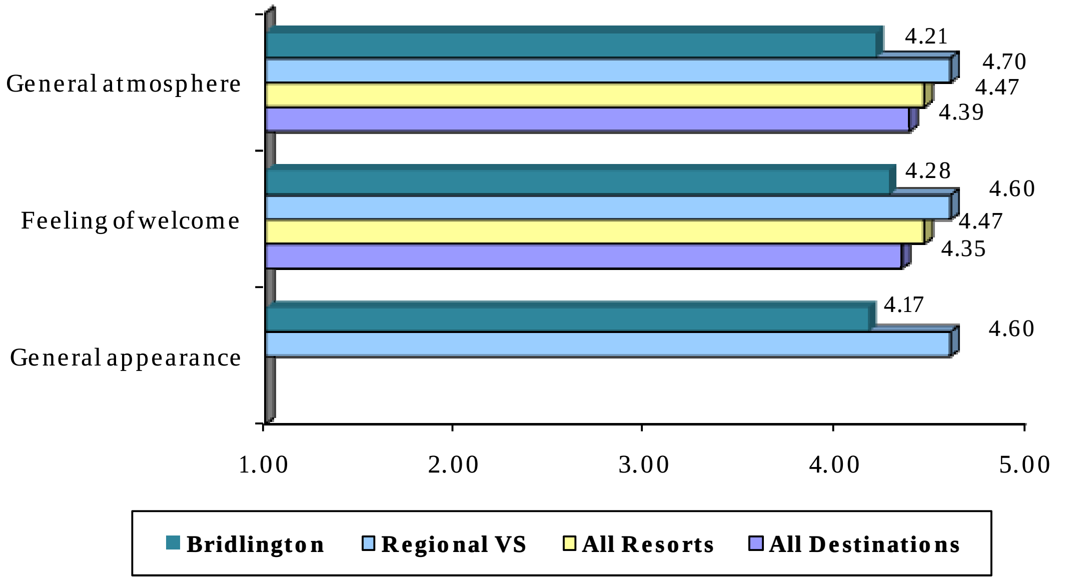
Table 11.29: Visitor opinions on quality of service at the TIC				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*53*	*965*	*7*	*26*
Very good	64%	55%	57%	58%
Good	32%	40%	35%	35%
Average	2%	4%	5%	5%
Poor	2%	1%	2%	2%
Very poor	0%	-	1%	1%

Table 11.30: Visitor opinions on usefulness of information received at TIC				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*53*	*980*	*7*	*26*
Very good	66%	56%	57%	59%
Good	32%	39%	35%	34%
Average	2%	4%	5%	5%
Poor	0%	1%	2%	1%
Very poor	0%	-	1%	1%

11.13 General Atmosphere & Feeling of Welcome

Visitors were asked for opinions on the general atmosphere and feeling of welcome and general appearance of Bridlington. All aspects were rated higher than the two comparator scores.

Figure 11.12: Opinions on general atmosphere & feeling of welcome



The general atmosphere of Bridlington was rated at 4.21, with 88% of visitors rating the atmosphere in Bridlington as good (53%) or very good (35%).

The feeling of welcome in the town was the highest rated aspect on opinions of the town at 4.28, with 89% rating this as good (47%) or very good (42%).

General appearance was rated at 4.17. 83% of visitors rated this as good (44%) or very good (39%), with a further 12% rating the general appearance of Bridlington as average.

Table 11.31: Visitor opinions on general atmosphere				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*400*	*5718*	*8*	*29*
Very good	35%	60%	56%	51%
Good	53%	36%	38%	39%
Average	10%	3%	5%	9%
Poor	2%	0%	1%	1%
Very poor	1%	0%	0%	0%

Table 11.32: Visitor opinions on feeling of welcome				
	Bridlington	Regional VS	All Resorts	All Destinations
Base	*400*	*5694*	*8*	*29*
Very good	42%	61%	57%	49%
Good	47%	35%	37%	39%
Average	9%	3%	5%	10%
Poor	2%	0%	1%	1%
Very poor	1%	0%	0%	0%

Table 11.33: Visitor opinions on general appearance		
	Bridlington	Regional VS
Base	*397*	*5716*
Very good	39%	63%
Good	44%	32%
Average	12%	4%
Poor	4%	1%
Very poor	1%	0%

11.14 Most enjoyable aspects of your visit to Bridlington

Visitors were asked to indicate the most enjoyable aspects of their visit to Bridlington. The top response was the seaside/coast/beaches (33%), in contrast to the rest of the region with only 5% stating this as an enjoyable aspect of their trip, however with Bridlington being a Resort town this is not surprising. Relaxing/peaceful environment (27%) was the next most enjoyed aspect of the visit, higher than the percentage received in the regional survey, followed by the scenery/countryside. The friendly people/atmosphere scored highly in both surveys. 18% of visitors in the regional survey stated the suitability of the area for children/families as an enjoyable aspect, compared to only 9% of visitors to Bridlington.

The table below details the most popular responses.

Table 11.34: Most enjoyable aspects of visit to Bridlington

	Bridlington	Regional VS
Seaside/coast/beaches	33%	5%
Relaxing/peaceful environment	27%	18%
Scenery/countryside	19%	-
Friendly people/atmosphere	15%	16%
Walking	15%	12%
Suitable for Children/families	9%	18%
Castles/Stately Homes	8%	7%
Shops/City Centre	6%	6%
Interactive attraction	3%	8%
Buildings/attractions of historical interest	3%	9%
The food/eating establishments	3%	-
Don't know/too early to say	2%	-
Friends/Family	1%	7%
Friends/family	1%	-
Weather	1%	-
Event/festival general	1%	-
Day out (general)	1%	-
Personal achievement/memories whilst in area	1%	-
Nothing	1%	-
Museum/Galleries	0%	14%

11.15 What would you improve about your visit to Bridlington?

Almost half (46%) of visitors indicated that there was nothing they would improve about their visit to Bridlington. Of those who did supply a response, 15% stated that better upkeep of the area would have improved their visit, followed by 7% who stated a better range of shops, higher than both the regional percentages. Other responses included the following:

Table 11.35: Any improvements about your visit to Bridlington		
	Bridlington	*Regional VS*
Nothing	46%	58%
Better upkeep of area	15%	7%
Better range of shops	7%	3%
Cheaper Car Parking	6%	4%
Better range of eating facilities	4%	3%
More car parking	4%	3%
Better signage	3%	6%
Better Weather	3%	3%
Don’t know/too early to say	3%	-
Improve public transport/road links	2%	-
More toilets	2%	-
Cleaner toilets	2%	-
Have more marine/animal attractions	2%	-
More to do in general	2%	-
Better nightlife	1%	
Lower prices	1%	2%
Improve animal welfare	1%	-
Better atmosphere	1%	-
Reduce queuing/congestions	1%	-
More honest/better advertising	1%	-
Improve accommodation	1%	-
Improve disabled facilities	1%	-

It should be noted that the majority of comments received (with scores of 1% and 2%) were only mentioned by a small proportion of visitors.

12.0. PRIORITY INDICATORS

12.1 Importance & Satisfaction Ratings

Visitors were also asked to indicate the importance of the following factors, alongside their satisfaction with these factors. By identifying those elements considered to be of greatest importance, the impact on future development can be maximised. For instance, where both satisfaction and importance are low, these factors should be lower on a priority list of action. However, where satisfaction is low but importance is high, these factors should be of higher priority. Furthermore, issues rated as important can be most effectively used in marketing and PR activity to attract visitors to the town.

The table below details the average scores in terms of both importance and satisfaction. These results indicate the factors visitors feel are the most ‘important’ to their visit and those factors visitors were most ‘satisfied’ with. A range of natural attractions to visit was of greatest importance with a score of 3.93, closely followed by 3.79 for a wide variety of attractions to interest a range of people. Of particular concern are the issues of high importance but relatively low satisfaction. A distinctive shopping experience was the only factor with a higher importance rating compared with its satisfaction rating, however it is worth mentioning that even though the satisfaction score was lower than the importance rating, the importance score of this factor was under the average rating of 3.00.

Table 12.1: Satisfaction and Importance Ratings for Bridlington

	Satisfaction	***Importance***
A range of natural attractions to visit e.g. the National Park, AONB's, coastal heritage, National Trust	3.96	3.93
A wide variety of attractions to interest a range of people	3.83	3.79
Environmentally-friendly services and facilities e.g. local produce, good public transport, cycling tracks	3.24	3.07
Lively nightlife	2.29	2.05
A distinctive shopping experience	2.79	2.86
A diverse range of outdoor activities e.g. walking and cycling	3.70	3.45

The figure below displays the results graphically, indicating the relationship between importance and satisfaction. The graph clearly displays the satisfaction levels for all aspects of the visitor experience against the importance levels and shows those aspects that require most attention i.e. of high importance but below average satisfaction.

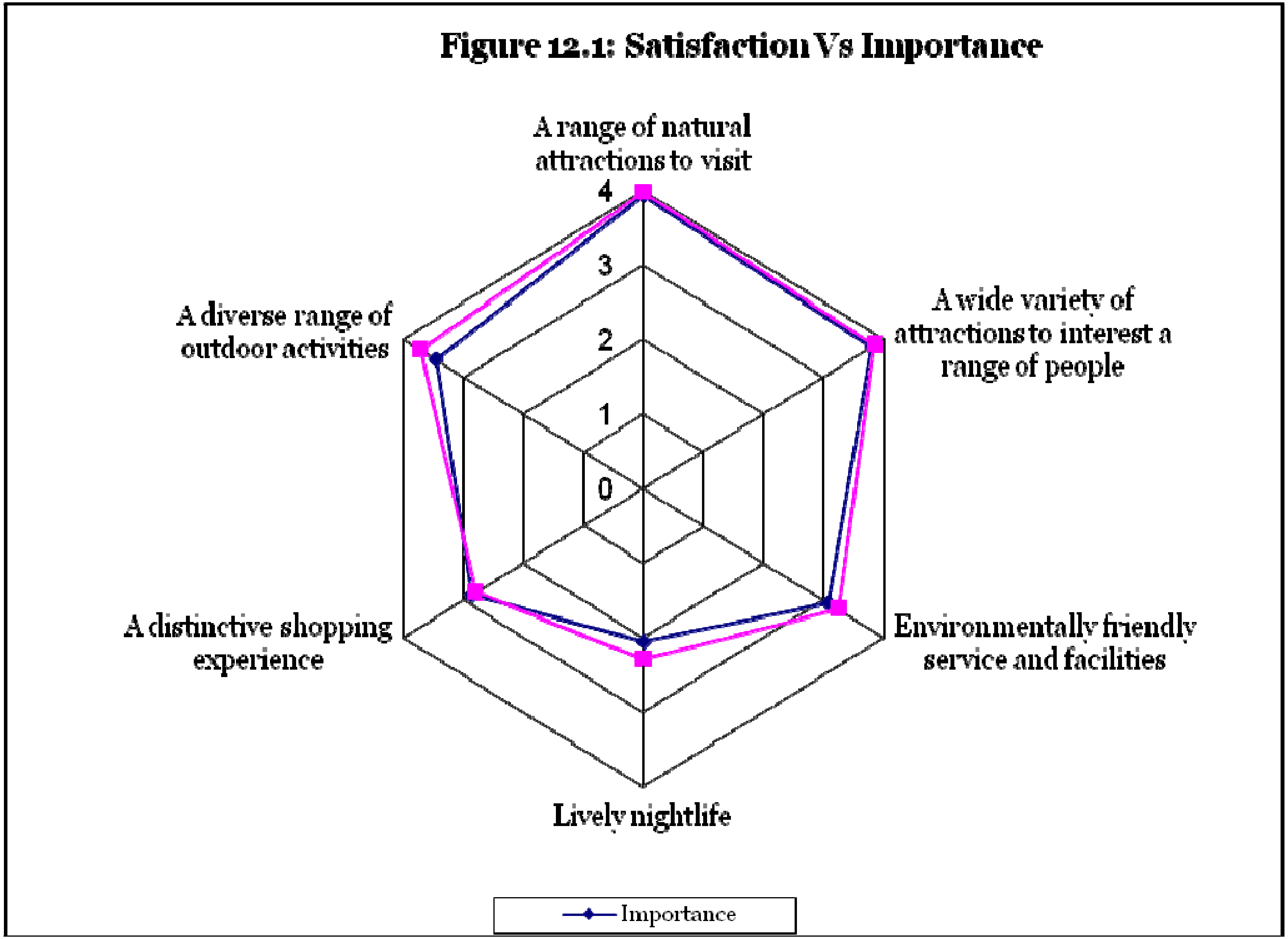


Figure 12.1: Satisfaction Vs Importance
A range of natural attractions to visit
A wide variety of attractions to interest a range of people
Environmentally friendly service and facilities
Lively nightlife
A distinctive shopping experience
A diverse range of outdoor activities
4
3
2
1
0
Importance

13.0 CONCLUSIONS

13.1 Markets currently attracted to the area

Overall, most of the results for Bridlington were positive. The results show similar levels of day visitors visiting the town (57% compared to the regional average (59%) with the majority originating from with Yorkshire and Humber itself (75%). Marketing resources need to be continually targeted at the existing core markets such as the East Midlands and the North West, in order to sustain the existing level of visitor movement and subsequent expenditure. Although many of the visitor origins are from further afield and therefore possibly more difficult to attract, there is still much to be gained from targeted marketing in London and the South East.

There is a reasonably high proportion of visitors staying overnight in Bridlington (21%) but there is also a high proportion of touring visitors visiting Beverley, i.e. those staying overnight elsewhere in the region and making a day trip to the town. Advertising in nearby tourist attractions will therefore be important in reaching this market. There is also the potential to encourage more day trippers to stay overnight within the town itself, by offering meal + accommodation packages or two day car parking passes for example.

The current market in Bridlington shows a fairly high percentage of adult couples (43% compared with 47% in the RVS) and adult groups visiting the town. This correlates with results from the MOSAIC profiling, which revealed a relatively high proportion of older adults. However, the family market is also significant and the high level of young visitors coming to the town could be built upon.

There is a high propensity of repeat visitors coming to Bridlington (91% vs. 72% in the RVS). Although this shows a loyal customer base (70% have visited the town in the last two years), more needs to be done to encourage new visitors into the town. Targeting those groups (such as the solo traveller or adult groups) may help to increase the levels of first time visitor. Future investment in improvements to the visitor experience are still important to ensure the town continues to attract both new and repeat visitors.

The research shows that previous experience and local knowledge of the area is high, along with recommendation and word of mouth. Increased use of websites could be further encouraged to aid holiday planning.

13.2 Patterns of existing markets

The nature of the tourism product in Bridlington currently attracts the longer stay market with visitors staying on average for 6.4 nights (5.2 in the RVS). The overnight visitor contributes to the economic well-being of the town, with longer visits encouraging increased expenditure. The results show that the majority of respondents using free accommodation were staying in caravans or camping or with friends or relatives. Commercial accommodation was dominated by the hotel/B&B/Guesthouse sector with only small levels using non-serviced (self-catering, caravan and camping etc).

The most popular activities included strolling around the town (74%), eating and drinking (58%) shopping (35%) and taking short walks for up to 2 hours (28%). It is encouraging that the three of the top activities include some form of expenditure, important in terms of the local economy.

13.3 Expenditure

Average spend on accommodation in Bridlington is on a par with the national average for resort destinations but falls below the regional average. This is likely to be due to the high volume of visitors staying in free accommodation within the town and a lower proportion in serviced accommodation.

Other areas where average spend falls below the regional average in Bridlington include spend on food and drink after 5pm and evening entertainment. By investing in the evening entertainment market in Bridlington and encouraging visitors to extend their stay to include dinner could help generate additional spend in the town.

13.4 Services and facilities

Across the survey as a whole, Bridlington recorded positive scores in terms of its services and facilities on offer. Value for money was rated highly by visitors staying in commercial accommodation. The Tourist Information Centre received high scores for its usefulness of the information they provide, quality of service and that they were able to locate the TIC with ease. The quality of service and value for money at the attractions, value for money at places to eat and drink were included in those services and facilities that scored above the regional visitor survey averages as well as the two national comparators. It is encouraging that many of these were based around the service provided in the town and correlates with the friendliness that many visitors had commented on.

The quality and service of the shopping environment where Bridlington scored lower than the regional average is an area where investment could be channelled. Encouraging more independent shops and increased training for existing retail businesses may increase the satisfaction of future visitors to Bridlington.

Appendices

Mosaic Type Classification	% Visitors to Bridlington	% Visitors to Region	% UK Population	Penetration	Index
A01 Global Connections	0.0%	0.1%	0.7%	0.000	0
A02 Cultural Leadership	0.3%	0.6%	0.9%	0.000	31
A03 Corporate Chieftains	0.3%	0.8%	1.2%	0.000	24
A04 Golden Empty Nesters	2.1%	1.6%	1.2%	0.001	167
A05 Provincial Privilege	1.5%	2.1%	1.6%	0.001	92
A06 High Technologists	1.5%	2.5%	2.0%	0.000	76
A07 Semi-Rural Seclusion	0.6%	2.7%	2.1%	0.000	29
B08 Just Moving In	0.3%	0.5%	1.0%	0.000	30
B09 Fledgling Nurseries	0.6%	1.3%	1.4%	0.000	43
B10 Upscale New Owners	1.5%	2.1%	1.6%	0.001	92
B11 Families Making Good	1.8%	2.8%	2.4%	0.000	75
B12 Middle Rung Families	3.2%	3.6%	3.0%	0.001	109
B13 Burdened Optimists	2.4%	2.1%	2.1%	0.001	114
B14 In Military Quarters	0.0%	0.3%	0.3%	0.000	0
C15 Close to Retirement	2.1%	4.2%	2.7%	0.000	75
C16 Conservative Values	4.7%	4.8%	2.5%	0.001	190
C17 Small Time Business	4.1%	5.2%	3.0%	0.001	139
C18 Sprawling Subtopia	3.8%	3.3%	2.9%	0.001	131
C19 Original Suburbs	0.6%	2.5%	2.5%	0.000	24
C20 Asian Enterprise	0.0%	0.3%	1.1%	0.000	0
D21 Respectable Rows	2.4%	2.5%	2.6%	0.001	91
D22 Affluent Blue Collar	7.7%	5.9%	3.0%	0.001	252
D23 Industrial Grit	6.8%	6.3%	3.8%	0.001	177
D24 Coronation Street	7.7%	3.6%	2.9%	0.001	268
D25 Town Centre Refuge	1.8%	0.7%	1.2%	0.001	150
D26 South Asian Industry	0.0%	0.3%	1.1%	0.000	0
D27 Settled Minorities	0.0%	0.2%	1.8%	0.000	0
E28 Counter Cultural Mix	0.0%	0.2%	1.3%	0.000	0
E29 City Adventurers	0.0%	0.3%	1.2%	0.000	0
E30 New Urban Colonists	0.0%	0.5%	1.3%	0.000	0
E31 Caring Professionals	0.3%	1.4%	1.1%	0.000	26
E32 Dinky Developments	0.6%	0.5%	1.0%	0.000	58
E33 Town Gown Transition	0.6%	0.7%	0.8%	0.000	75
E34 University Challenge	0.9%	0.2%	0.6%	0.001	153
F35 Bedsit Beneficiaries	0.3%	0.2%	0.6%	0.000	48

F36 Metro Multiculture	0.0%	0.1%	1.8%	0.000	0
F37 Upper Floor Families	0.6%	0.8%	1.8%	0.000	33
F38 Tower Block Living	0.3%	0.2%	0.4%	0.000	74
F39 Dignified Dependency	0.6%	0.7%	1.2%	0.000	49
F40 Sharing a Staircase	0.0%	0.1%	0.4%	0.000	0
G41 Families on Benefits	1.2%	0.8%	1.4%	0.000	85
G42 Low Horizons	4.1%	3.0%	2.7%	0.001	152
G43 Ex-industrial Legacy	5.3%	2.5%	2.6%	0.001	203
H44 Rustbelt Resilience	4.7%	3.2%	2.9%	0.001	160
H45 Older Right to Buy	3.2%	2.0%	2.3%	0.001	140
H46 White Van Culture	1.2%	1.5%	3.3%	0.000	35
H47 New Town Materialism	0.9%	1.7%	2.5%	0.000	36
I48 Old People in Flats	0.9%	0.4%	0.7%	0.001	134
I49 Low Income Elderly	2.4%	1.2%	1.5%	0.001	162
I50 Cared for Pensioners	1.8%	0.6%	1.1%	0.001	155
J51 Sepia Memories	0.6%	0.4%	0.7%	0.000	89
J52 Childfree Serenity	0.0%	1.0%	1.3%	0.000	0
J53 High Spending Elders	0.9%	1.6%	1.4%	0.000	63
J54 Bungalow Retirement	1.2%	1.1%	1.1%	0.001	111
J55 Small Town Seniors	2.7%	3.1%	2.7%	0.001	100
J56 Tourist Attendants	0.3%	0.2%	0.3%	0.001	102
K57 Summer Playgrounds	0.0%	0.2%	0.3%	0.000	0
K58 Greenbelt Guardians	1.2%	1.9%	1.7%	0.000	68
K59 Parochial Villagers	2.4%	1.8%	1.6%	0.001	146
K60 Pastoral Symphony	1.5%	1.8%	1.3%	0.001	113
K61 Upland Hill Farmers	0.3%	0.5%	0.4%	0.000	77
U99 Unclassified	1.8%	0.5%	0.3%	0.003	533
Total	**100.00**		**1.00**	**0.001**	**100**