South West Visitor Survey 2008

CHAPTER SIX

Visitor satisfaction

Summary

•**Generally speaking visitor satisfaction levels are high across the range of factors measured through the South West Visitor Survey 2008.**

•Visitors to the South West displayed the highest levels of satisfaction with the overall enjoyment of their visit, the general atmosphere and the overall feeling of welcome during their visit.

• **The lowest levels of satisfaction displayed amongst all visitors were for the availability of information and advice on road congestion, the availability of public toilets and the cleanliness of public toilets.**

• When comparing satisfaction with importance, visitor satisfaction mean scores were higher than their comparative importance scores across the majority of factors. Indeed, satisfaction scores for a number of factors are considerably higher than the corresponding importance scores.

• **Satisfaction scores for the availability of public toilets, cleanliness of public toilets and value for money at places to eat and drink are currently considerably lower than their importance scores.**

Summary

•GAP analysis of the data indicates that value for money at accommodation, attractions and at places to eat and drink are areas which require attention, along with the availability and cleanliness of public toilets and the cleanliness of the streets.

• The strength of visitor satisfaction is likely to be underlined by the results for two key questions;

> *Would you recommend the South West as a place to visit to a friend or relative?*
>
> *How likely would you be to visit the South West?*

90% of respondents would definitely recommend the South West as a place to visit and 88% would definitely re-visit, confirming the high satisfaction scores. However, there is still room for improvement as the analysis contained within this chapter clearly shows.

INTRODUCTION

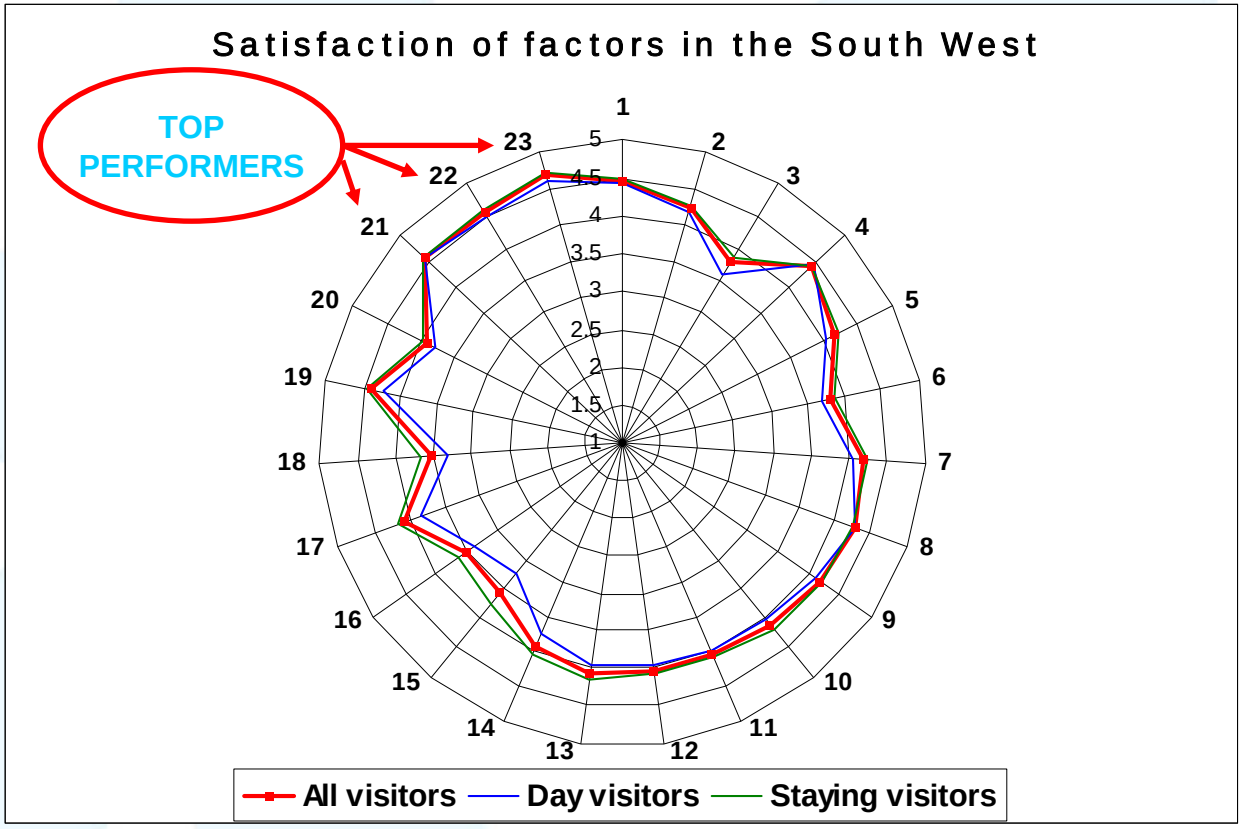
A key objective for the South West Visitor Survey was to establish visitor satisfaction levels in the region in 2008. Satisfaction levels were explored for 25 different factors associated with a visit to the region and are displayed in this chapter in terms of the mean score achieved for each, with a full breakdown of responses for each factor also provided.

Where possible the mean satisfaction scores have also been compared alongside importance scores which were collected during the South West Importance Ratings survey 2006. The survey asked respondents to rate a range of factors in terms of importance when deciding to visit the South West. This simple analysis will highlight discrepancies between what people say is important and their satisfaction with the same.

Also provided in this chapter are relative satisfaction scores which analyse the performance of each factor in relation to the others. This method of analysis provides a clear indication of where efforts should be focused to continually improve the visitor experience.

SATISFACTION LEVELS

Satisfaction ratings are shown below and are ranged from 1 to 5, with 1 being 'poor' and 5 'excellent' hence the higher the mean score in the chart the greater the satisfaction with the factor concerned.



1 - Attractions - range
2 - Attractions - quality of service
3 - Attractions - value for money
4 - Places to eat & drink - range
5 - Places to eat & drink - quality of service
6 - Places to eat & drink - value for money
7 - Places to eat & drink - availability of local food & drink
8 - Shops - range
9 - Shops - quality of shopping environment
10 - Shops - quality of service
11 - Road signs
12 - Pedestrian signs
13 - Brown & white tourist signs
14 - Display maps & info. boards
15 - Public toilets - availability
16 - Public toilets - cleanliness
17 - Cleanliness of the streets
18 - Availability of info/advice on road congestion
19 - Upkeep of parks & open spaces
20 - Choice of nightlife/evening entertainment
21 - General atmosphere
22 - Feeling of welcome
23 - Overall enjoyment of visit

Satisfaction levels connected to accommodation are shown on the following page.

SATISFACTION LEVELS – KEY POINTS

•Visitors to the South West displayed the highest levels of satisfaction with the overall enjoyment of their visit, the general atmosphere and the overall feeling of welcome during their visit.

• When analysed by visitor type, the top three remains unchanged.

•Differences between day and staying visitors were slight, however, broadly speaking, day visitors had lower levels of satisfaction than staying visitors across the large majority of factors.

•The lowest levels of satisfaction displayed amongst all visitors were for the availability of information and advice on road congestion and the cleanliness of public toilets (3.53 for each) and the availability of public toilets (3.55).

The mean scores for accommodation related factors, asked of staying visitors only, are shown below: -

Staying visitors only	Mean score
Accommodation – Value for money	4.35
Accommodation – Quality of service	4.44

SATISFACTION MEAN SCORES

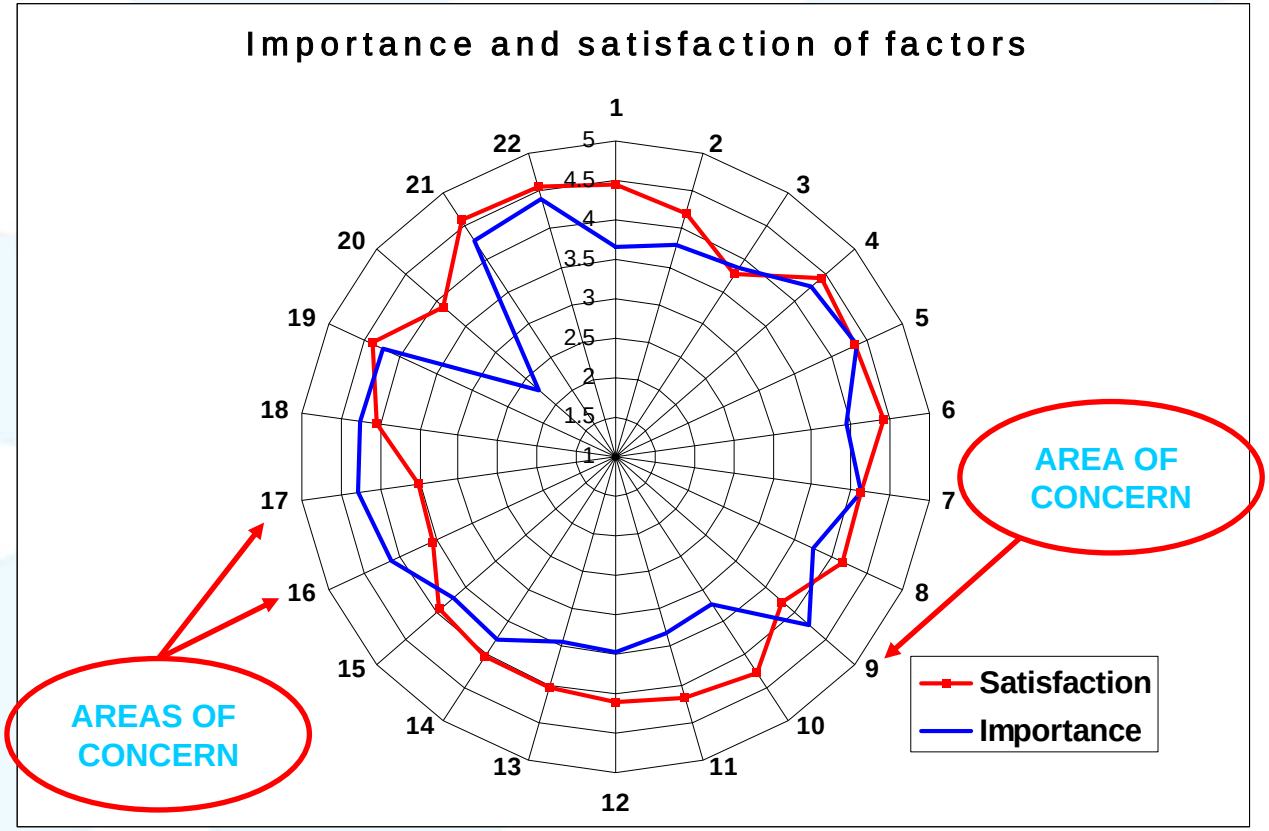
Factors	All Visitors 2008	All Visitors 2007	Day Visitors 2008	Staying Visitors 2008
Attractions - range	4.46	4.36	4.43	4.47
Attractions - quality of service	4.22	4.22	4.14	4.25
Attractions - value for money	3.76	3.75	3.58	3.85
Places to eat & drink - range	4.43	4.4	4.46	4.42
Places to eat & drink - quality of service	4.14	4.17	4.01	4.2
Places to eat & drink - value for money	3.79	3.77	3.69	3.85
Places to eat & drink - availability of local food & drink	4.17	4.06	4.04	4.24
Shops - range	4.25	4.17	4.26	4.24
Shops - quality of shopping environment	4.18	4.12	4.13	4.21
Shops - quality of service	4.1	4.08	3.98	4.17
Road signs	4.03	3.94	3.98	4.06
Pedestrian signs	4.03	4.04	3.96	4.07

SATISFACTION MEAN SCORES

Factors	All Visitors 2008	All Visitors 2007	Day Visitors 2008	Staying Visitors 2008
Brown & white tourist signs	4.08	4.04	3.96	4.16
Display maps & info. boards	3.94	3.97	3.75	4.05
Public toilets - availability	3.55	3.53	3.22	3.73
Public toilets - cleanliness	3.53	3.53	3.37	3.62
Cleanliness of the streets	4.06	3.99	3.83	4.16
Availability of info/advice on road congestion	3.53	3.47	3.3	3.66
Upkeep of parks & open spaces	4.39	4.31	4.22	4.46
Choice of nightlife/evening entertainment	3.9	3.89	3.77	3.97
General atmosphere	4.57	4.56	4.57	4.58
Feeling of welcome	4.54	4.48	4.47	4.58
Overall enjoyment of visit	4.66	4.65	4.59	4.7

SATISFACTION VERSUS IMPORTANCE

Comparing the mean satisfaction scores gathered through this project and mean importance scores taken from the South West Importance Ratings survey 2006, allows for a more informed view of visitor satisfaction to be gained. Comparative data was available for 22 of the 25 factors covered in this project.



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22 - Feeling of welcome

SATISFACTION VERSUS IMPORTANCE – KEY POINTS

- Generally speaking, visitor satisfaction mean scores were higher than their comparative importance scores across the majority of factors.

- Satisfaction scores for a number of factors are considerably higher than the corresponding importance scores.

- The main areas of concern are the availability of public toilets, cleanliness of public toilets and value for money at places to eat and drink. All of these factors have mean importance scores greater than 4, highlighting the weight of importance that visitors place on them. However, satisfaction scores for all three are currently considerably lower than their importance scores.

SATISFACTION AND IMPORTANCE MEAN SCORES

Factors	Satisfaction	Importance
Attractions - range	4.46	3.65
Attractions - quality of service	4.22	3.79
Attractions - value for money	3.76	3.88
Accommodation – quality of service	4.44	4.29
Accommodation – value for money	4.35	4.38
Places to eat & drink - range	4.43	3.95
Places to eat & drink - quality of service	4.14	4.13
Places to eat & drink - availability of local food & drink	4.17	3.77
Places to eat & drink - value for money	3.79	4.24
Shops - range	4.25	3.23
Shops - quality of shopping environment	4.18	3.31

SATISFACTION AND IMPORTANCE MEAN SCORES

Factors	Satisfaction	Importance
Shops - quality of service	4.1	3.47
Road signs	4.03	3.44
Pedestrian signs	4.03	3.76
Display maps & info. boards	3.94	3.73
Public toilets - availability	3.55	4.12
Public toilets - cleanliness	3.53	4.28
Cleanliness of the streets	4.06	4.26
Upkeep of parks & open spaces	4.39	4.26
Choice of nightlife/evening entertainment	3.9	2.29
General atmosphere	4.57	4.26
Feeling of welcome	4.54	4.39

GAP ANALYSIS

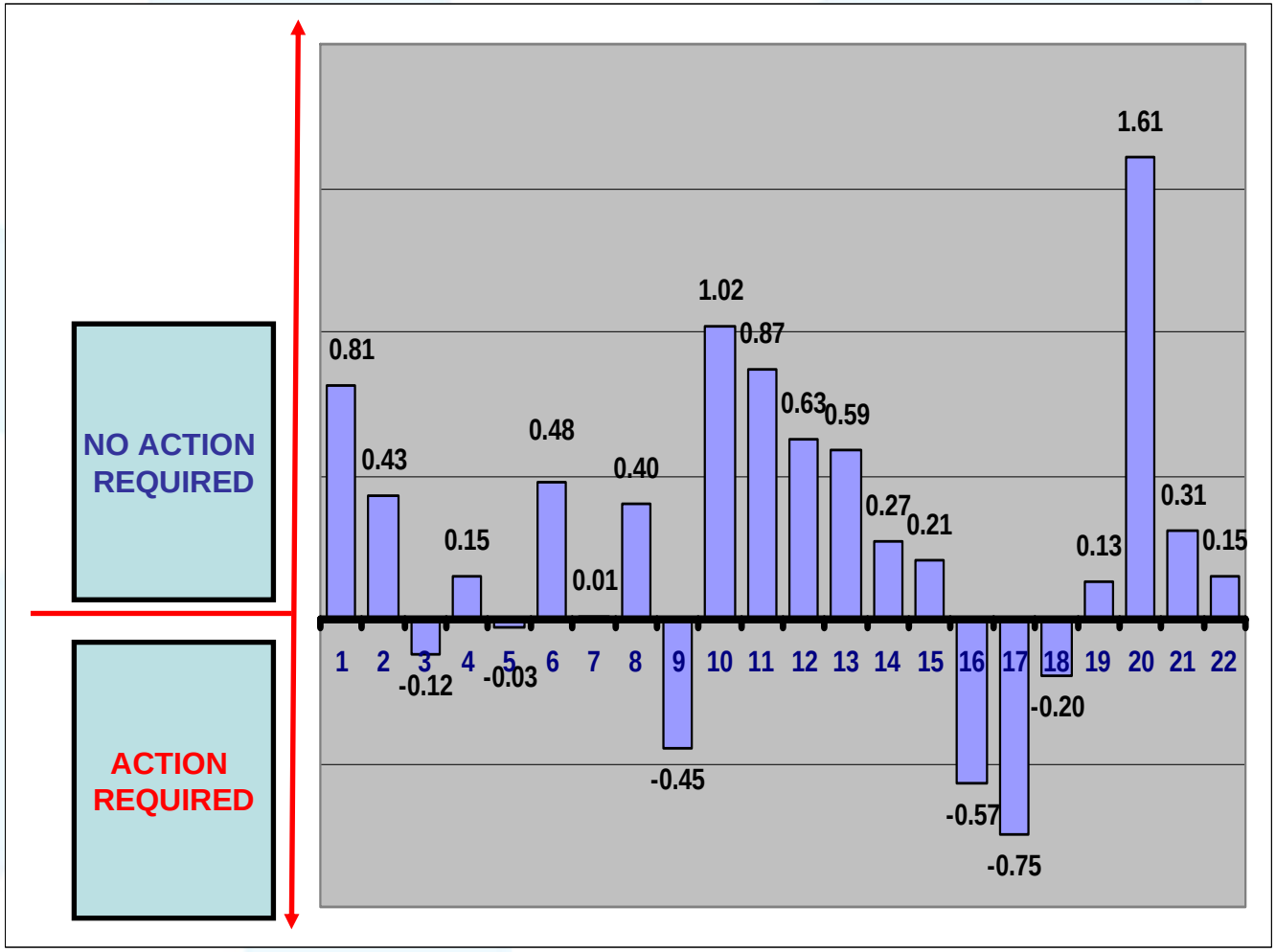
Gap analysis provides an alternative, easy to read, method of analysing mean satisfaction scores in relation to their comparative mean importance scores.

Through deducting the mean importance score from the mean satisfaction score the analysis clearly shows the performance of each individual factor. A negative score indicates that action is required and a positive score indicates that no action is required.

The following page shows the gap analysis for the 22 factors for which importance and satisfaction comparative mean scores were held.

The analysis indicates that value for money at accommodation, attractions and at places to eat and drink are areas which require attention, along with the availability and cleanliness of public toilets and the cleanliness of the streets.

GAP ANALYSIS OF SATISFACTION SCORES



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22 - Feeling of welcome

VISITOR SATISFACTION – IN PURSUIT OF EXCELLENCE

In an ever competitive market place, with increasing customer demands and higher expectation levels it is essential to be able to plan for continual improvement to the visitor experience.

Whilst visitor satisfaction scores shown on the previous pages show the South West region generally to be performing well, there is always room for further improvement. The following page re-visits the factors covered for satisfaction and provides analysis of their scores in relation to each other (relative performance). This provides a clear picture of areas which are performing below average in relation to the other factors and should assist with future planning.

Calculations have been carried out based on the range of satisfaction scores achieved to provide five groups, into which the individual indicators have been placed. The groups and key used are shown below.

WELL ABOVE AVERAGE	RED
ABOVE AVERAGE	BLUE
AVERAGE	BLACK
BELOW AVERAGE	GREEN
WELL BELOW AVERAGE	PURPLE

VISITOR SATISFACTION – RELATIVE PERFORMANCE

ALL VISITORS	SCORE
Attractions - range	4.46
Attractions - quality of service	4.22
Attractions - value for money	3.76
Places to eat & drink - range	4.43
Places to eat & drink - quality of service	4.14
Places to eat & drink - value for money	3.79
Places to eat & drink - availability of local food & drink	4.17
Shops - range	4.25
Shops - quality of shopping environment	4.18
Shops - quality of service	4.1
Road signs	4.03
Pedestrian signs	4.03
Brown & white tourist signs	4.08
Display maps & info. boards	3.94
Public toilets - availability	3.55
Public toilets - cleanliness	3.53
Cleanliness of the streets	4.06
Availability of info/advice on road congestion	3.53
Upkeep of parks & open spaces	4.39
Choice of nightlife/evening entertainment	3.9
General atmosphere	4.57
Feeling of welcome	4.54
Overall enjoyment of visit	4.66

WELL ABOVE AVERAGE	RED
ABOVE AVERAGE	BLUE
AVERAGE	BLACK
BELOW AVERAGE	GREEN
WELL BELOW AVERAGE	PURPLE

Those areas shaded in either purple or green are priority areas for the South West region.

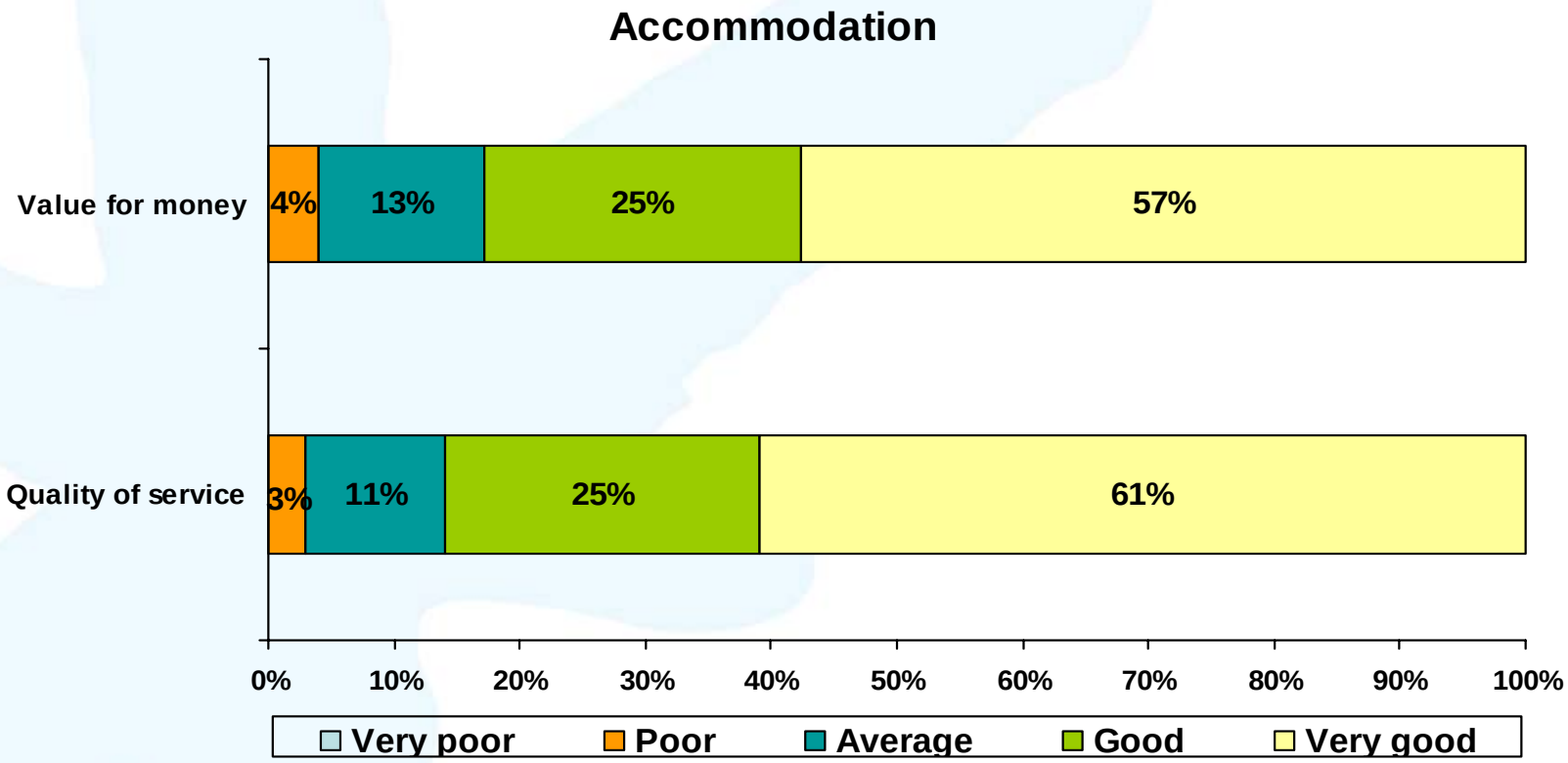
VISITOR SATISFACTION – RESPONSES IN DETAIL

The following slides look at the areas covered by this study and provide a breakdown of the responses given for each factor.

The 25 factors have been grouped into eight categories for this purpose as shown below: -

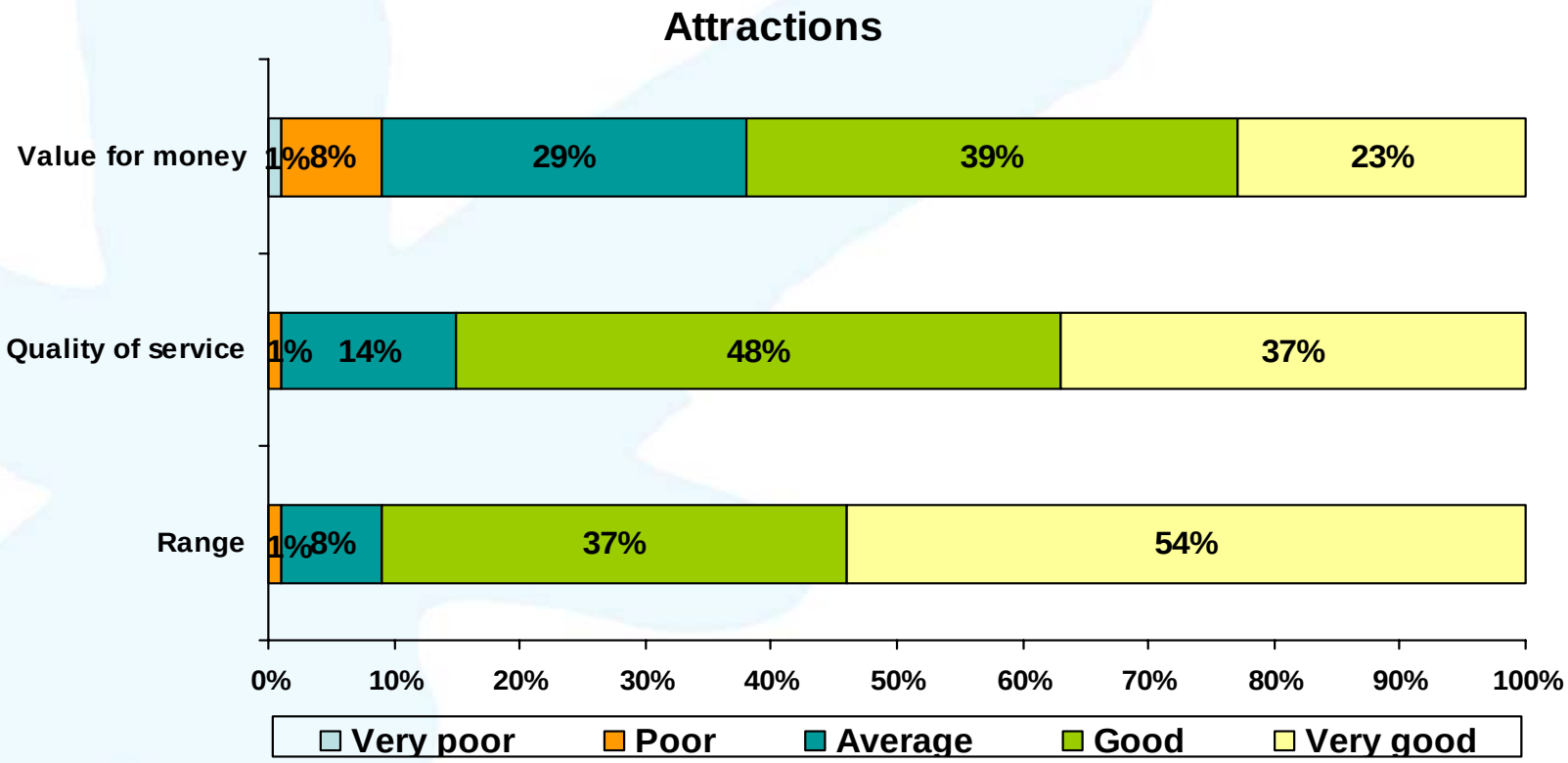
- **Accommodation**
- **Attractions**
- **Places to eat & drink**
- **Shops**
- **Information and signage**
- **Streets and toilets**
- **Nightlife and parks**
- **Enjoyment, welcome and atmosphere**

VISITOR SATISFACTION – ACCOMMODATION



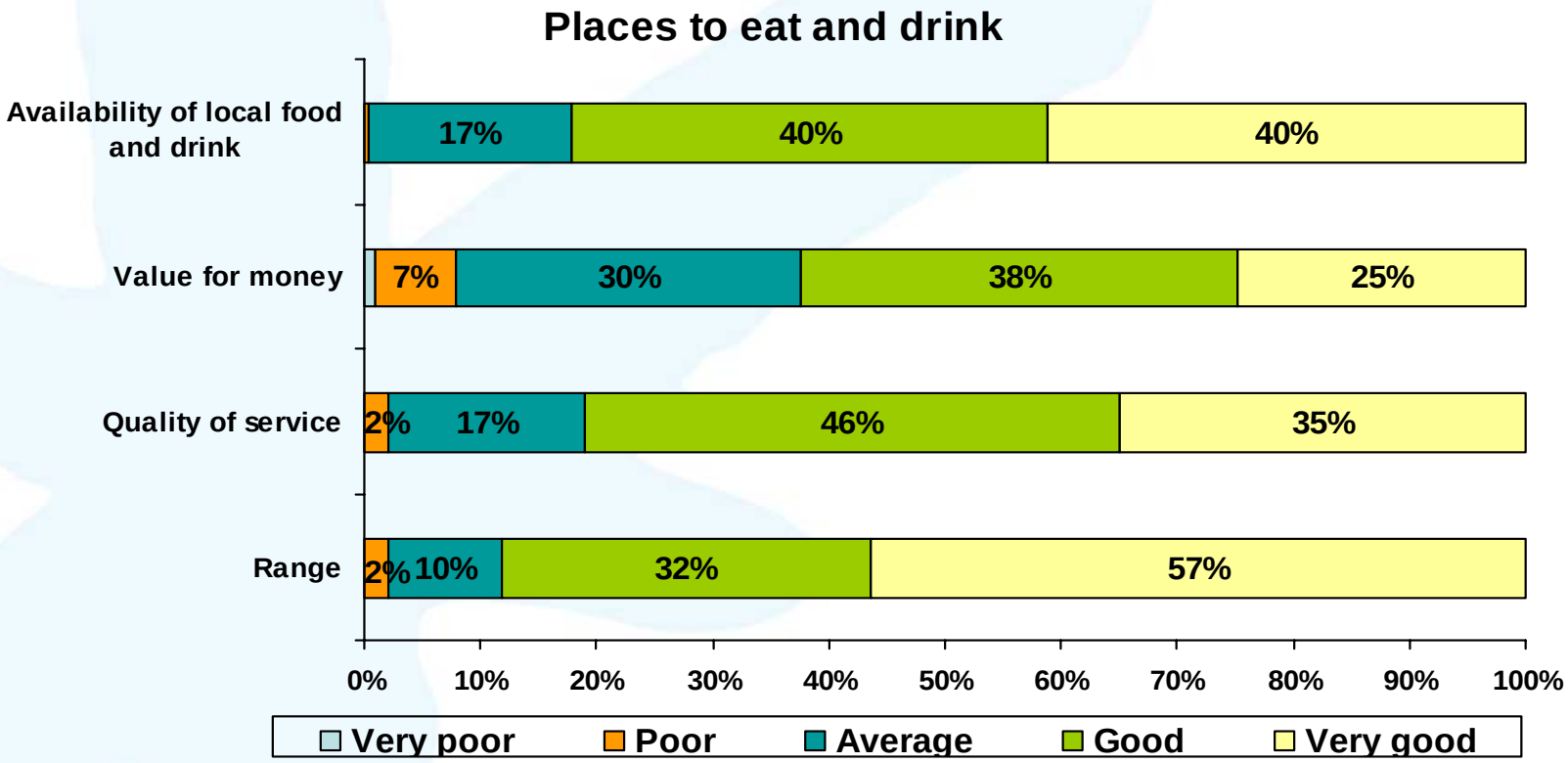
The majority of respondents rated their accommodation as very good for both quality of service and value for money. 4% of respondents rated their accommodation as poor in terms of value for money and 3% of respondents rated their accommodation as poor in terms of quality of service.

VISITOR SATISFACTION – ATTRACTIONS



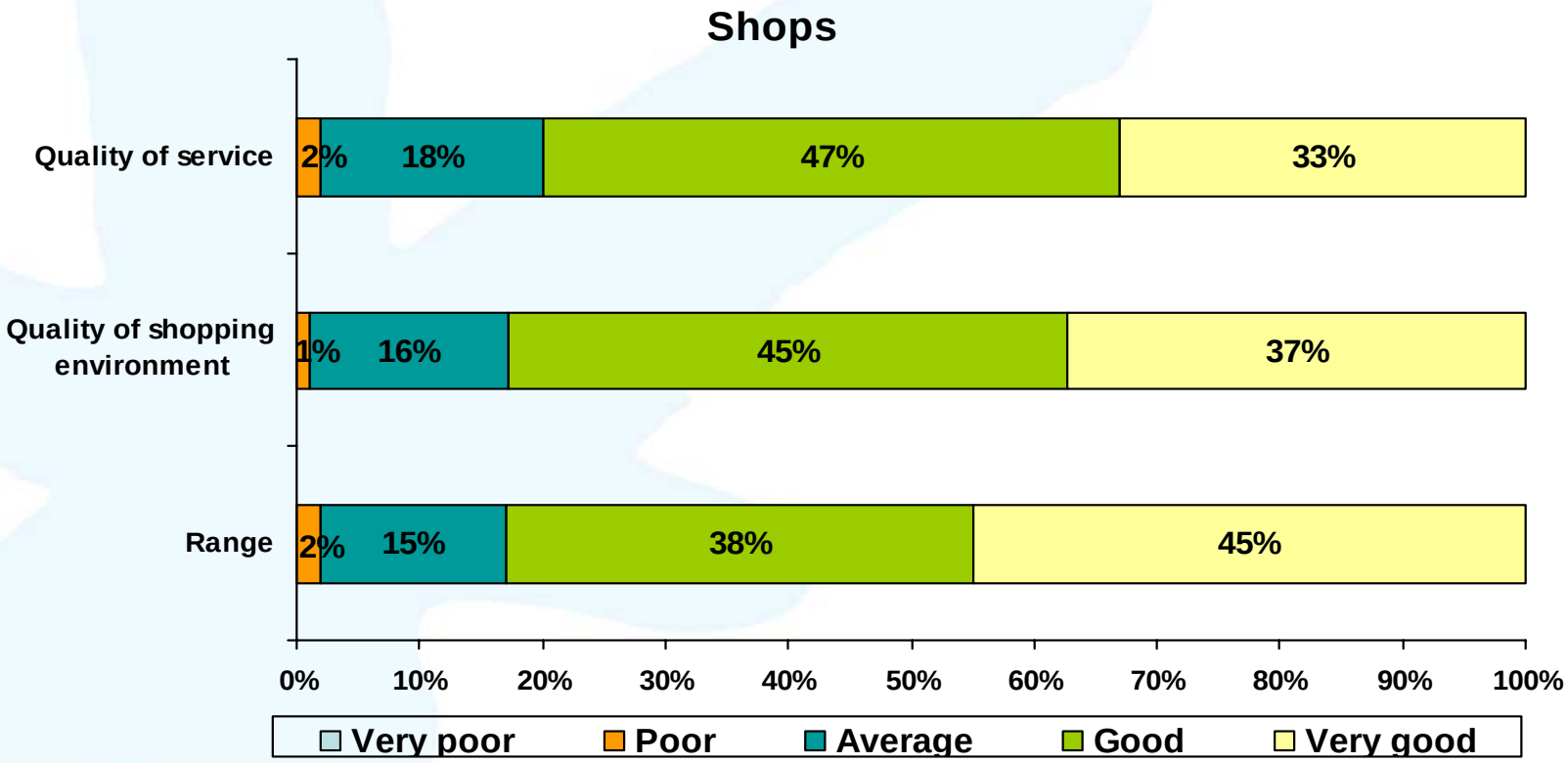
The majority of respondents rated all attraction related factors as either very good or good, although satisfaction was highest with the range of attractions on offer in the region. Whilst satisfaction was still relatively high, value for money was the lowest rated of the attraction related factors with 9% of respondents rating it as either poor or very poor.

VISITOR SATISFACTION – PLACES TO EAT AND DRINK



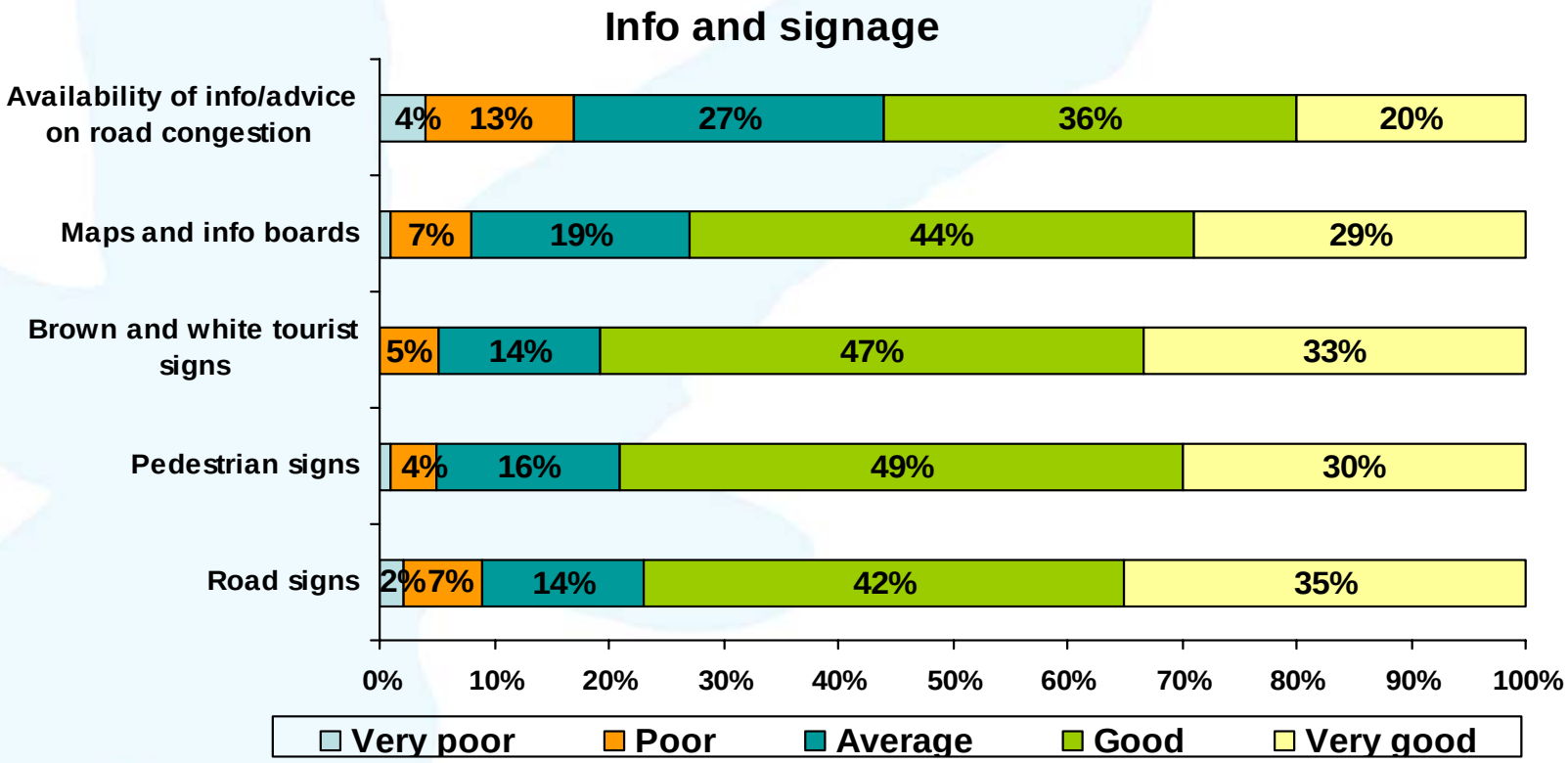
Visitor satisfaction for places to eat and drink was similar to that for attractions with regards to the range, quality of service and value for money. The highest level of satisfaction recorded was for the range of places to eat and drink and the lowest was for value for money. 80% of respondents rated the availability of local food and drink as either good or very good.

VISITOR SATISFACTION – SHOPS



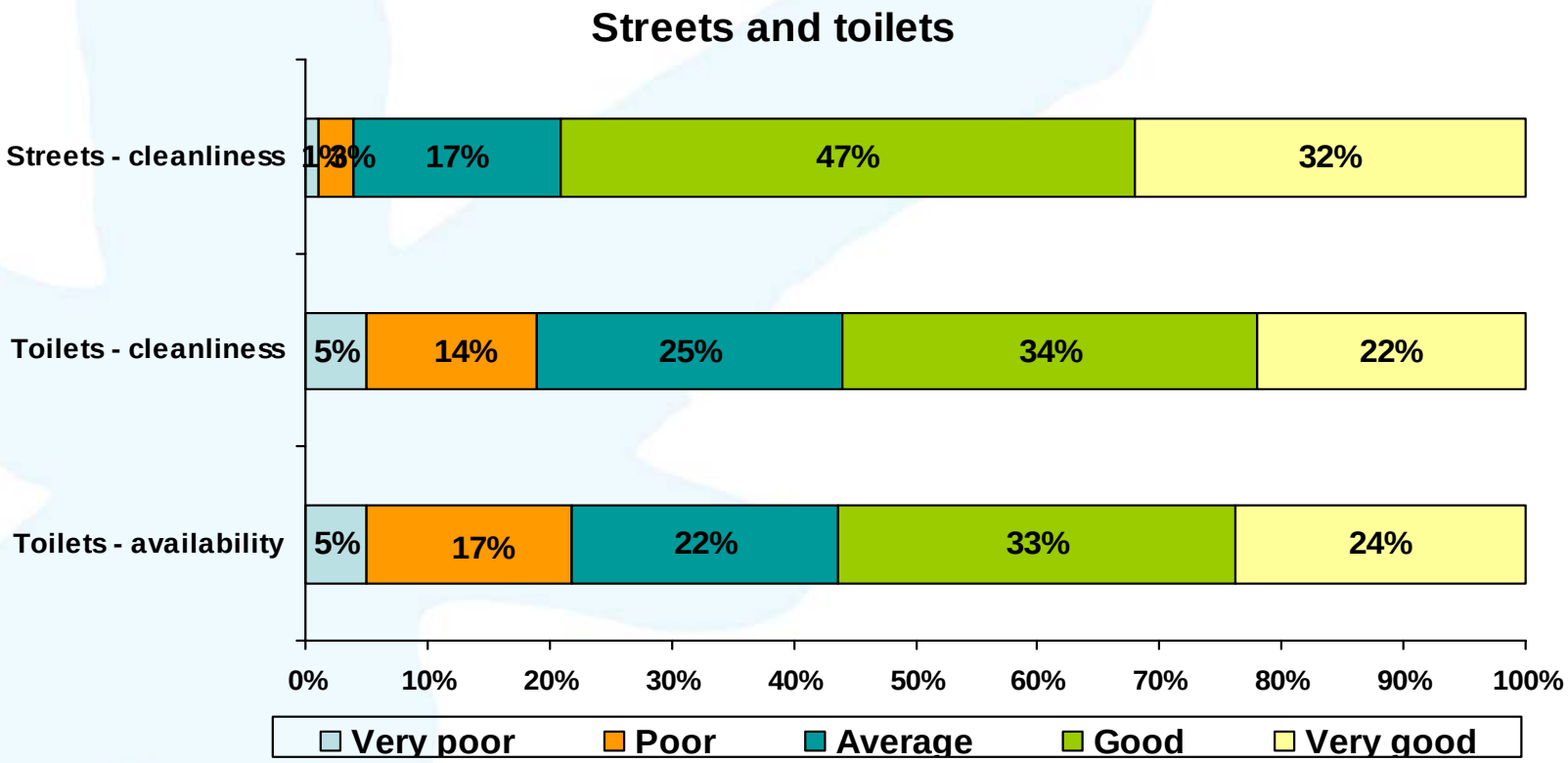
The majority of respondents rated all shopping related factors as either very good or good. Similar proportions of respondents rated the range of shops and the quality of the shopping environment in the region as either very good or good (83% and 82% respectively).

VISITOR SATISFACTION – INFO AND SIGNAGE



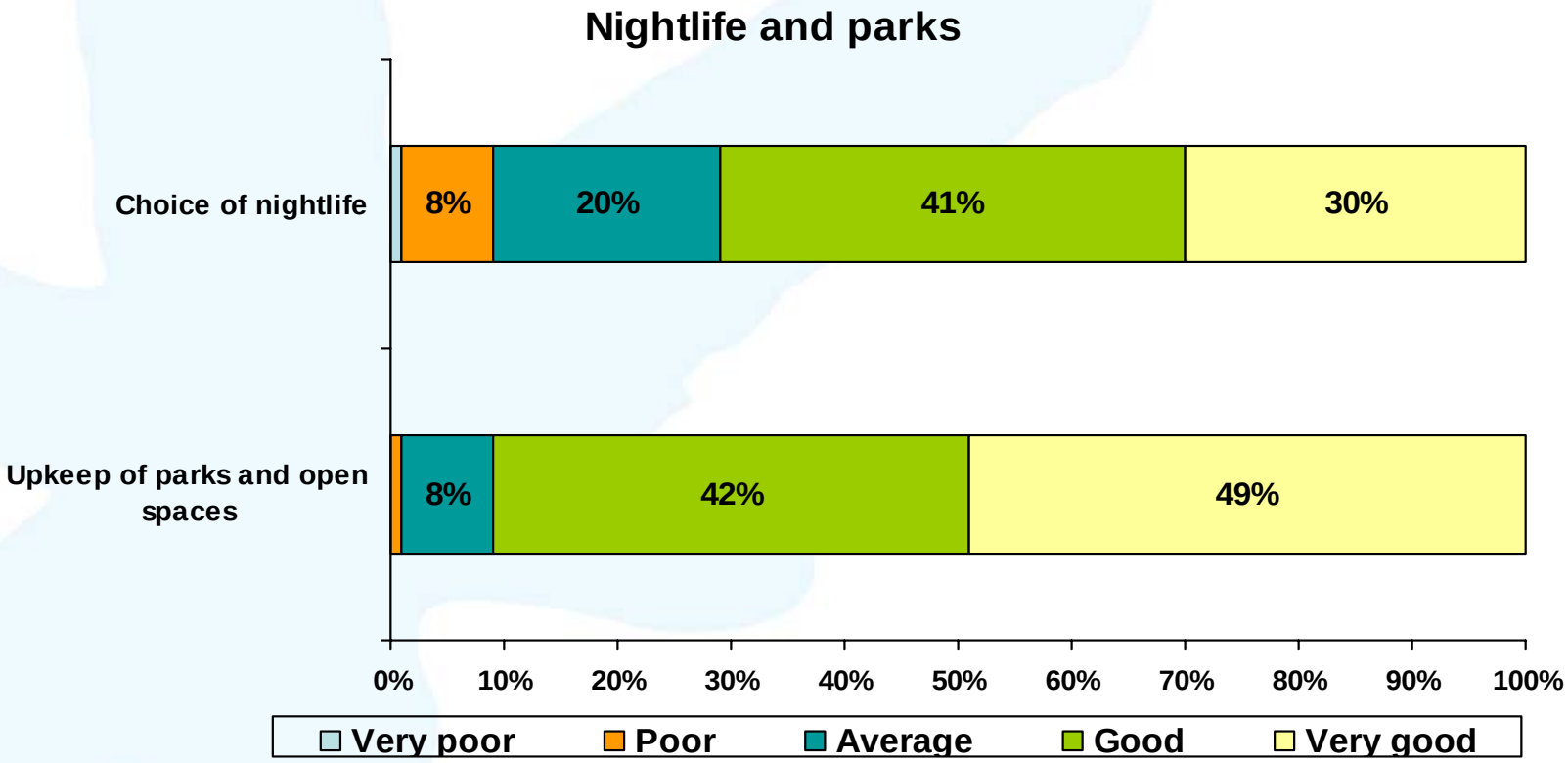
Whilst the majority of respondents rated all information and signage factors as either good or very good comparison with previous categories highlights this as a potential area for improvement. 17% of respondents rated the availability of information on road congestion as either poor or very poor and 9% rated road signs generally as either poor or very poor.

VISITOR SATISFACTION – STREETS AND TOILETS



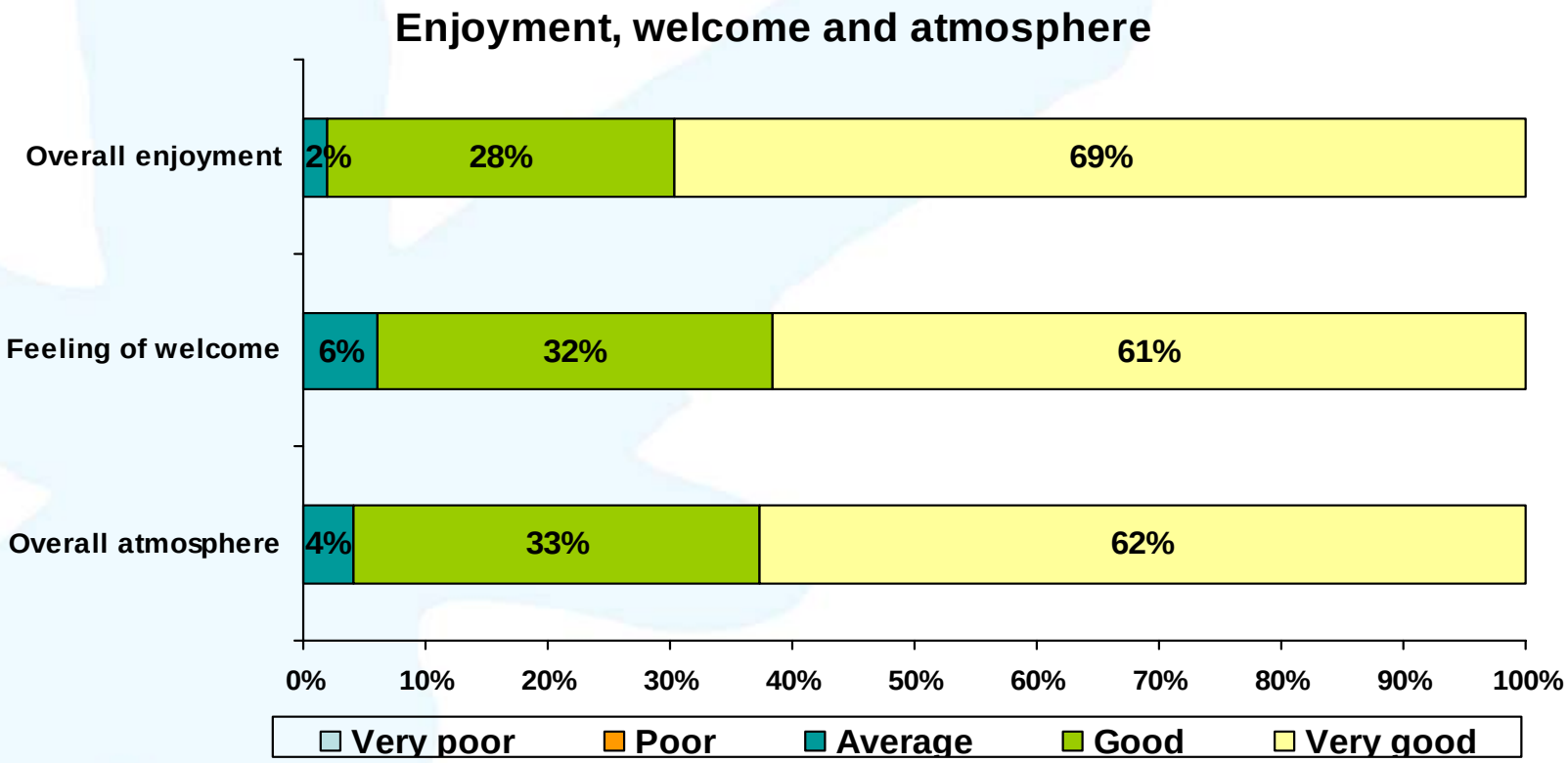
Visitor satisfaction with the cleanliness of the streets was relatively high with 79% rating it as either very good or good, although both the availability and cleanliness of toilets are areas for potential improvement with approximately 1 in 5 of respondents rating these factors as either poor or very poor.

VISITOR SATISFACTION – NIGHTLIFE AND PARKS



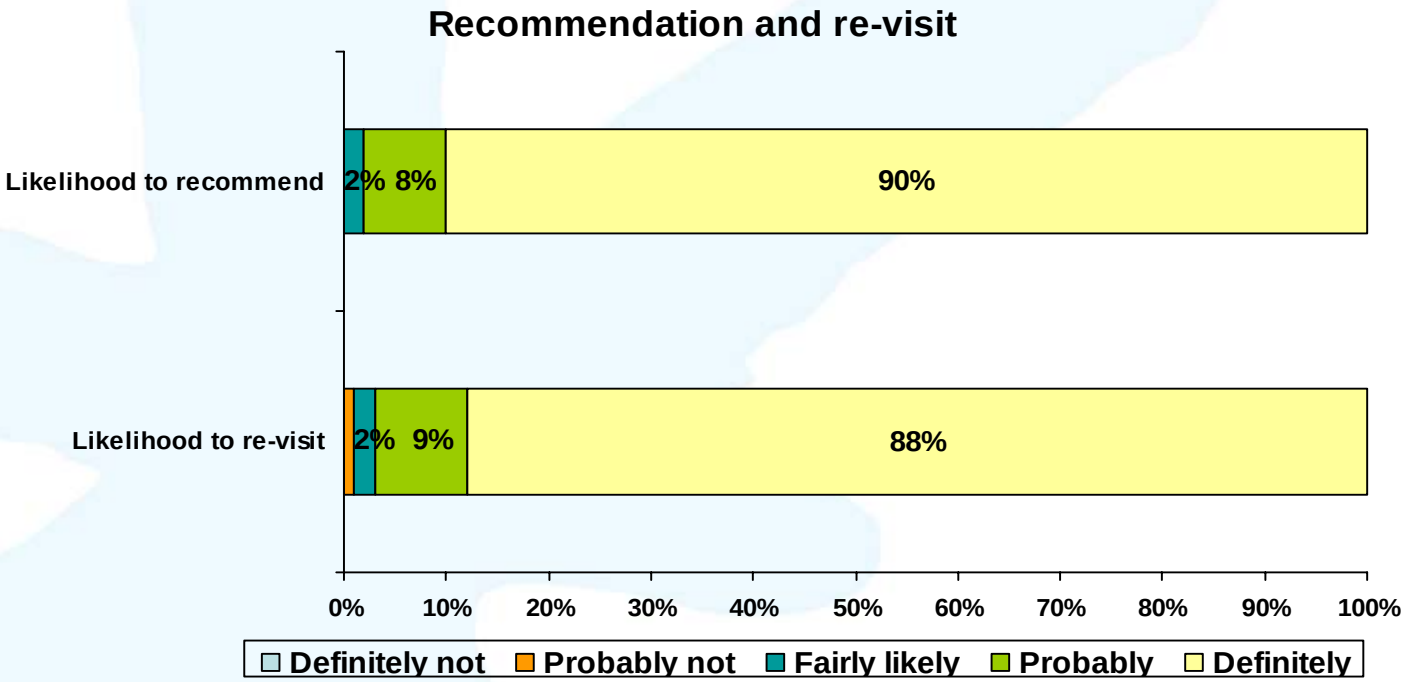
Visitor satisfaction with the upkeep of parks and open spaces was high with 91% of respondents rating it as either very good or good. 71% of respondents rated the choice of nightlife as either very good or good, although approximately one in ten respondents rated this factor as poor or very poor.

VISITOR SATISFACTION – ENJOYMENT, WELCOME AND ATMOSPHERE



Visitor satisfaction was very high for all three factors in this category with more than 90% rating each as either very good or good. Whilst the satisfaction scores analysis shows that there are areas for improvement elsewhere it would appear that they have not impacted upon these three key areas which are essential to enjoying a holiday in the region.

VISITOR SATISFACTION – LIKELIHOOD TO RECOMMEND AND RE-VISIT



The strength of visitor satisfaction is likely to be underlined by the results for two key questions;

Would you recommend the South West as a place to visit to a friend or relative?

How likely would you be to visit the South West?

90% of respondents would definitely recommend the South West as a place to visit and 88% would definitely re-visit, confirming the high satisfaction scores on the previous pages. However, there is still room for improvement as the analysis contained within this chapter clearly shows.