



The Lake District destination report



VisitEngland Destination tracker:

- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience measures** such as, visitation, spend, stay length, satisfaction and advocacy within individual destinations. As well as the **imagery perceptions** of each destination.
- In the report there are 3 samples for comparison; those from whom this destination was the most recently visited, those who claim to visit a countryside destinations at C52 and finally a GB average.
- All respondents are GB holiday takers, having taken a GB break in the past 12 months or are expecting to in the next 12 months. This accounts for approx. 49% of the population.
- Significant differences will be indicated by a **black**↑/**orange**↓ arrow against countryside destinations and a **blue**↑/**red**↓ against GB.
- This report provides a snapshot of:
 1. A demographic split of destination visitors
 2. The behaviours exhibited at the destination: How loyal are they to the destination and how satisfied were they with their trip?
 3. How GB holiday makers perceive this destination and how does it compare with others?
- Finally there is a summary of findings.

Who is visiting?

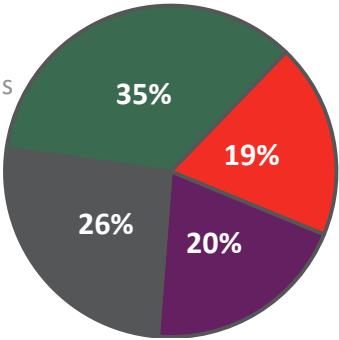
Ever Visited The Lake District :

68%

Visited destination in the last 3 years

Time since last visit

- Within 6 months
- 7 - 12 months
- 1 - 3 years
- >3 years



Gender	The Lake District	Countryside	Great Britain
Male	54%	48%	49%
Female	46%	52%	51%

Age	The Lake District	Countryside	Great Britain
18-24	13%	12%	14%
25-34	21%↑↑	14%	16%
35-44	19%	18%	17%
45-54	21%	19%	18%
55-64	11%	14%	15%
65+	14%↓↓	23%	20%

Region of origin	The Lake District	Countryside	Great Britain
Wales	4%	6%	5%
Scotland	7%	9%	9%
North East	3%	5%	4%
North West	17%↑↑	11%	11%
Yorkshire/ Humberside	13%↑	10%	9%
East Midlands	6%	8%	7%
West Midlands	10%	8%	9%
East Anglia / East of England	8%	9%	10%
Greater London	15%↑	11%	13%
South East	8%↓↓	15%	14%
South West	8%	9%	9%

*Please note respondents can have visited more than one destination in the last 3 years

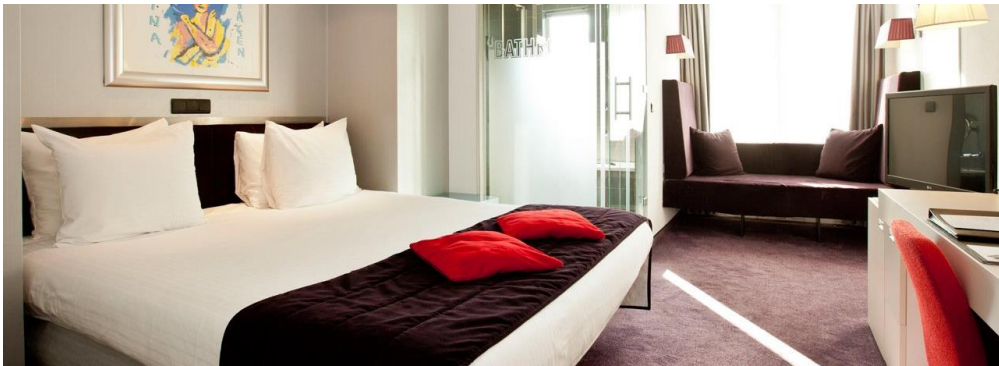
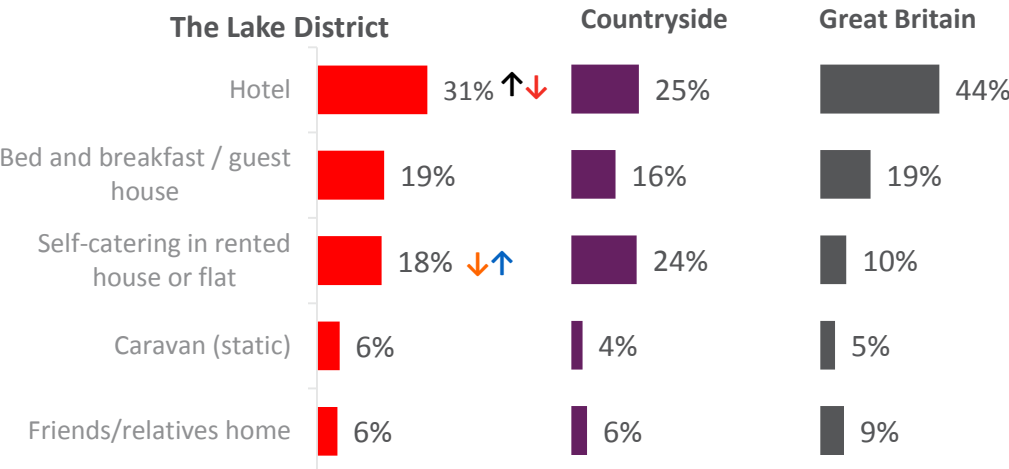
THE LAKE DISTRICT ATTRACTS A YOUNGER AUDIENCE THAN OTHER COUNTRYSIDE DESTINATIONS- ESPECIALLY AMONG 25-34 YEAR OLDS. VISITORS ARE MORE LIKELY TO BE FROM THE NORTH WEST THAN THE SOUTH EAST. THE LAKE DISTRICT ALSO ATTRACTS A SIGNIFICANTLY HIGHER PROPORTION OF VISITORS FROM LONDON WHEN COMPARED TO OTHER COUNTRYSIDE DESTINATIONS.

Base: The Lake District reduced destination list n=713 The Lake District last 3 years reduced destination list n=297 Countryside destination n= 1695 Total base n=12771

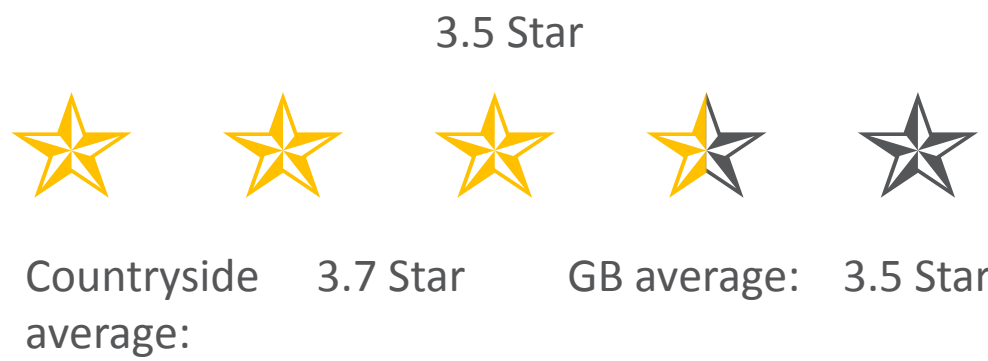
Significant differences will be indicated by a black↑/orange↓ arrow against countryside destinations and a blue↑/red↓ against GB

Where are they staying? – among most recent visitors

Accommodation type (Top 5)



Accommodation Quality Average (claimed)



Accommodation Quality	The Lake District	Countryside	Great Britain
1 star	1%	1%	1%
2 star	4%	4%	6%
3 star	33%	29%	36%
4 star	40%↑	35%	33%
5 star	3%↓↑	11%	7%
Don't know/ Can't Remember	19%	21%	17%

HOTEL USE IS MORE EXTENSIVE IN THE LAKE DISTRICT THAN OTHER COUNTRYSIDE DESTINATIONS BUT LESS SO THAN GREAT BRITAIN. VISITORS TO THE LAKE DISTRICT WANT QUALITY, WITH THE MAJORITY CLAIMING TO HAVE STAYED IN 4 STAR ACCOMMODATION BUT SIGNIFICANTLY FEWER CLAIM TO HAVE STAYED IN 5 STAR ACCOMMODATION WHEN COMPARED TO OTHER COUNTRYSIDE DESTINATIONS.

Consideration, satisfaction & intention to visit

Loyalty Ladder		The Lake District destination average	Countryside destination average*	Great Britain destination average*
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)		29%	16%	17%
Considerers (I have been/never been to this destination before but would like to in the future)		59%	49%	48%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)		8%	27%	26%
Satisfaction		62%	54%	48%
Likelihood to revisit		9.2	8.3	8.4
Base n=		713/300	1695	12179

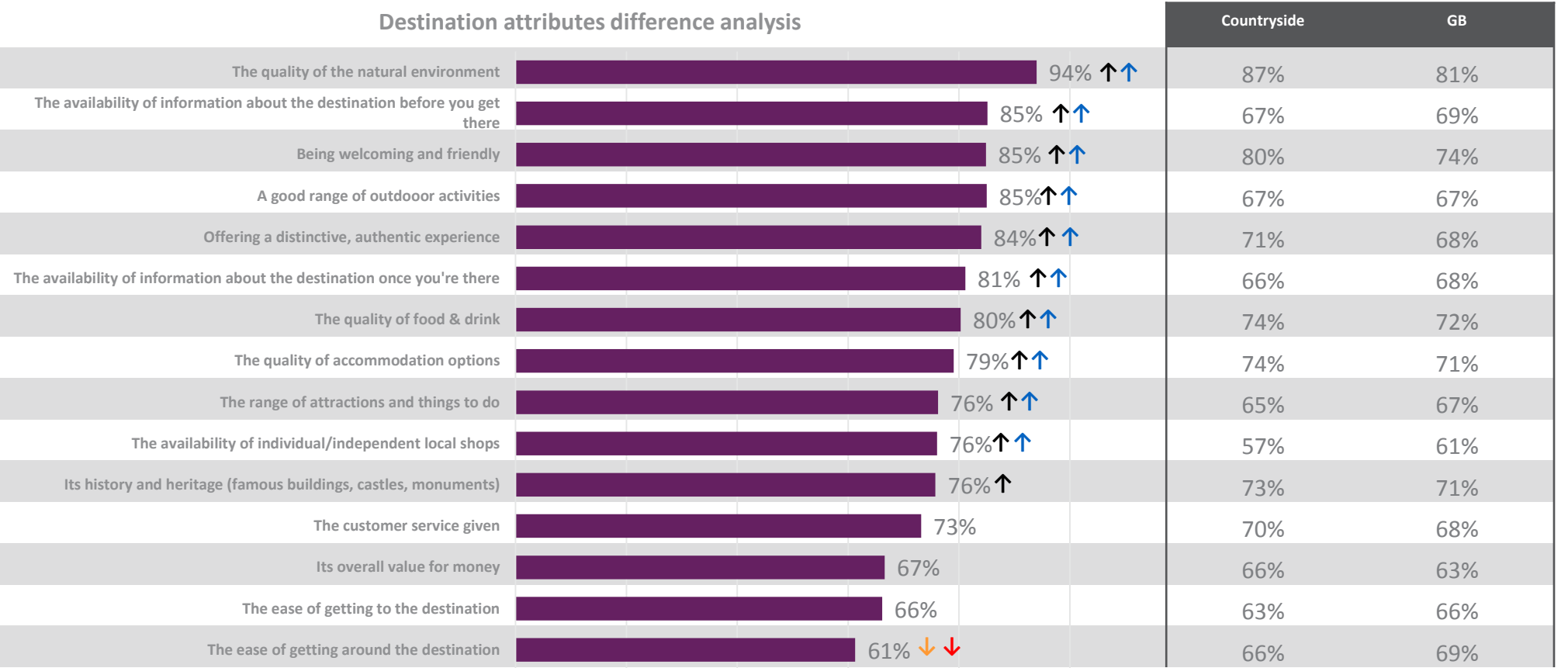
THE LAKE DISTRICT INSPIRES MIGHT HIGHER LOYALTY AND CONSIDERATION THAN OTHER DESTINATIONS ACROSS GB. SATISFACTION IS ABOVE WHAT WE WOULD EXPECT FROM A DESTINATION OF THIS KIND, WHICH IS REFLECTED IN HIGH LIKELIHOOD TO REVISIT.

Base: In table Asked of all The Lake District shown on rotation from reduced destination list / Most recently visited destination

Question name: In tables

* Averages taken manually from averaging each destination, not via nett.

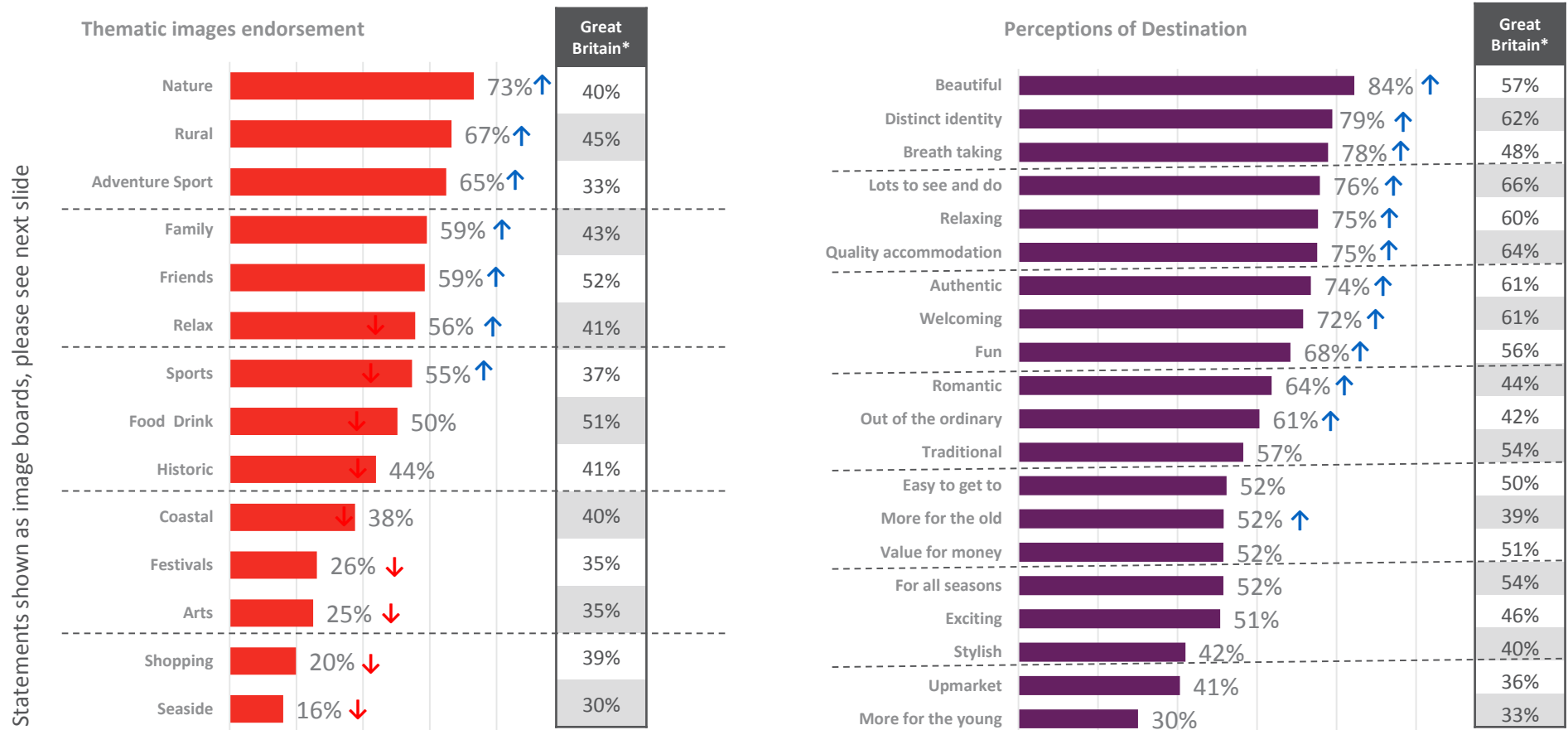
Destination attribute satisfaction – among visitors to the Lake District



THE MOST NOTABLE DESTINATION ATTRIBUTE AMONG VISITORS, WITH ALMOST UNIVERSAL AGREEMENT, IS THE QUALITY OF THE NATURAL ENVIRONMENT. HOWEVER, COMPARED TO OTHER DESTINATIONS VISITORS FOUND IT DIFFICULT TO GET AROUND THE LAKE DISTRICT.

Destination attribute perception - among GB holiday makers

These questions ask how destinations are perceived generally, not how each was rated on a recent trip. The question is asked of visitors and non-visitors.



PREDICTABLY THE LAKE DISTRICT IS PERCEIVED AS A BEAUTIFUL RURAL DESTINATION. HOWEVER, AMONG OTHER THINGS, THE LAKE DISTRICT WHEN COMPARED TO GB IS ALSO SEEN AS MORE FUN AND AN AREA FOR ADVENTURE SPORT. DESPITE HAVING A YOUNGER VISITOR DEMOGRAPHIC THE LAKE DISTRICT IS NOT SEEN AS "MORE FOR THE YOUNG".

Base: The Lake District n=317, Total n=12179

Question name: C90 Destination attributes

* Averages taken manually from summing each destination, not via nett.

The theme boards

Image boards (E30/35)

Shopping



Seaside



Rural



Relax



Nature



Historic



Adventure



Friends



Food & drink



Festivals



Family



Coastal



Arts



Sports



Word associations (E40/45)

- Beautiful
- Breath-taking
- Distinct culture
- Traditional
- Authentic
- Relaxing
- Quality accommodation
- Fun
- Friendly
- Romantic
- Surprising
- Exciting
- Out of the ordinary
- Value for money
- For all seasons
- Stylish
- More for the old
- Easy to get to
- Upmarket
- More for the young

Summary: The Lake District

- Over two thirds of domestic holiday makers have taken a trip to the Lake District. Among visitors 40% had visited within the last 12 months.
- The Lake District attracts a younger demographic compared to the rest of Great Britain with significantly more 25-34 year olds visiting the destination.
 - When comparing the Lake District and other countryside destinations the difference is even larger. The proportion of 25-34 year olds is 50% higher in Lake District than other countryside destinations.
 - Despite the skew towards younger visitors, the Lake District is not perceived as “more for the young”.
- Trips to the Lake District usually involve a stay in a hotel. Visitors claim to have stayed in quality accommodation, but the proportion of visitors claiming to have stayed in 5 star accommodation is significantly lower than in other countryside destinations.
- The Lake District has very high levels of satisfaction when compared to both countryside and GB destinations.
- The “quality of the natural environment” is the dominant perceptive trait among visitors of the Lake District. It is clear that this view is spreading to domestic holiday makers generally who view the destinations as “natural” “beautiful” and “rural”.
- **A watch out:** The Lake District fares poorly for “ease of getting round the destination”.