

English Riviera

2021 Tourism overview



Prepared by The South West Research Company Ltd

October 2023

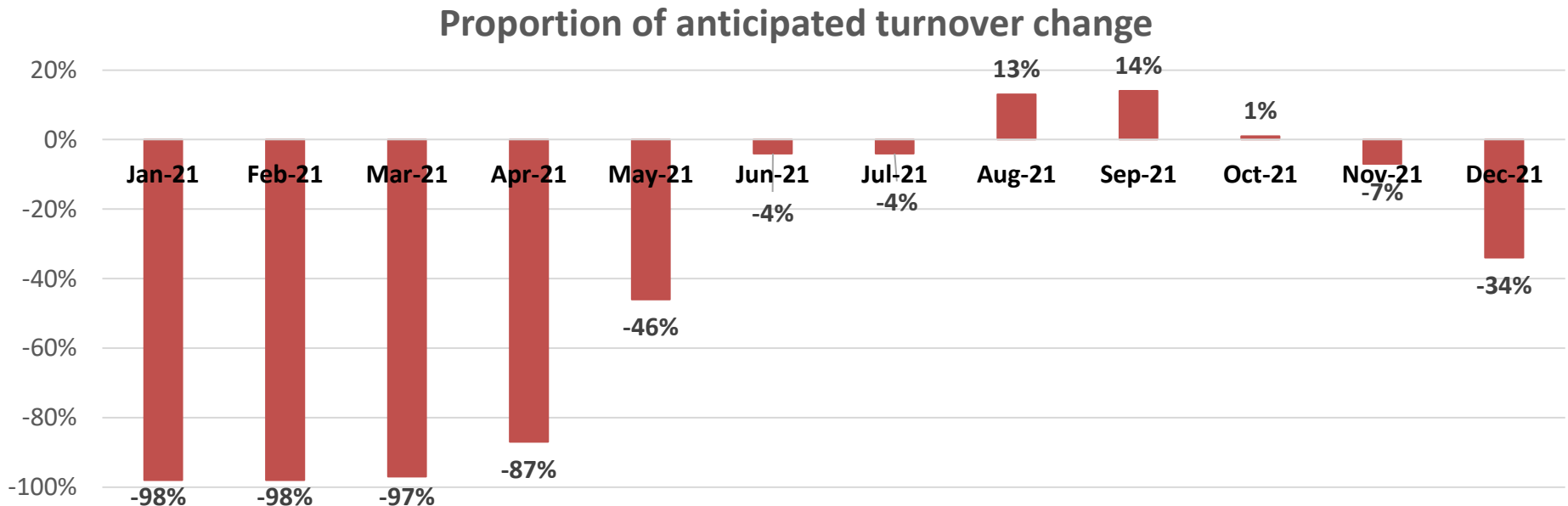


Key points

- Tourism performance in 2021 on the English Riviera and across the UK was severely impacted and influenced by the Covid pandemic and the various business and travel restrictions put in place as a result.
- The UK went back into lockdown in January.
- Restrictions began to ease in March, self catering accommodation and outdoor venues re-opened in April, with indoor venues re-opening in May.
- Some social contact rules remained in place however until mid-July.
- In December, the Omicron variant of the virus surfaced in the UK reducing tourism activity again.
- A monthly Covid impact survey was in place on the English Riviera across the year with the key focus being turnover change compared to 2019.

Business Performance – Business turnover in 2021 compared to 2019

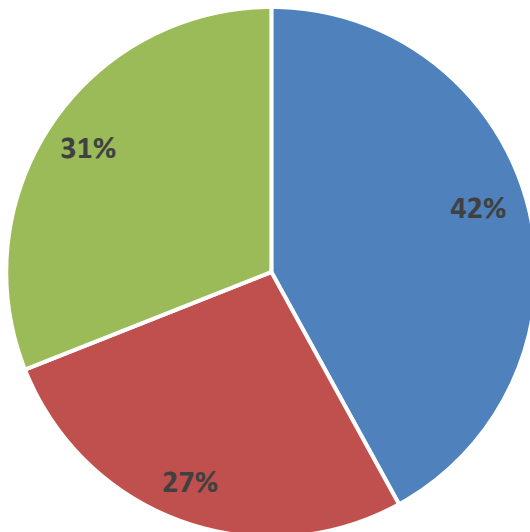
- The impacts of lockdown and the re-opening of the industry can be clearly seen through the chart below showing the changes in turnover by month across the year.
- Decreases in business turnover were evident across all months except for August through to October which saw increased turnover levels. A 13% increase in the peak month of the year (August) was particularly significant.
- It's likely that for the May to July period the demand was there to increase turnover overall but businesses were still operating with restrictions.



Business Performance – Visitors and turnover in 2021 compared to 2019

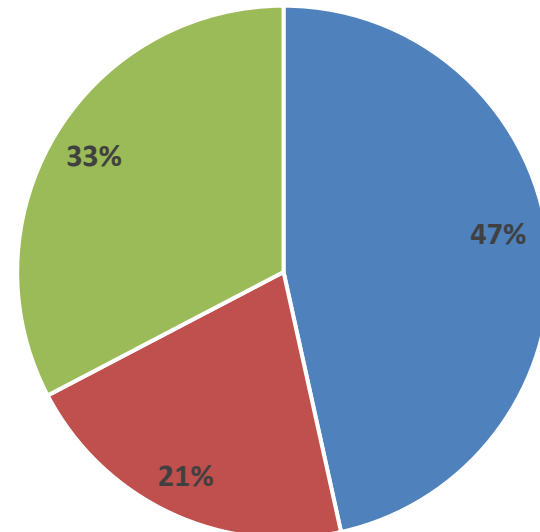
- At the end of the year businesses were asked to provide an overall assessment of their visitor and turnover levels for the year. As shown in the charts below good proportions of businesses reported increases in both measures despite Covid restrictions.
- However, around a third of businesses reported decreases for both measures.

2021 overall
Visitors/customers



■ Increased ■ Stayed the same ■ Decreased

2021 overall
Turnover

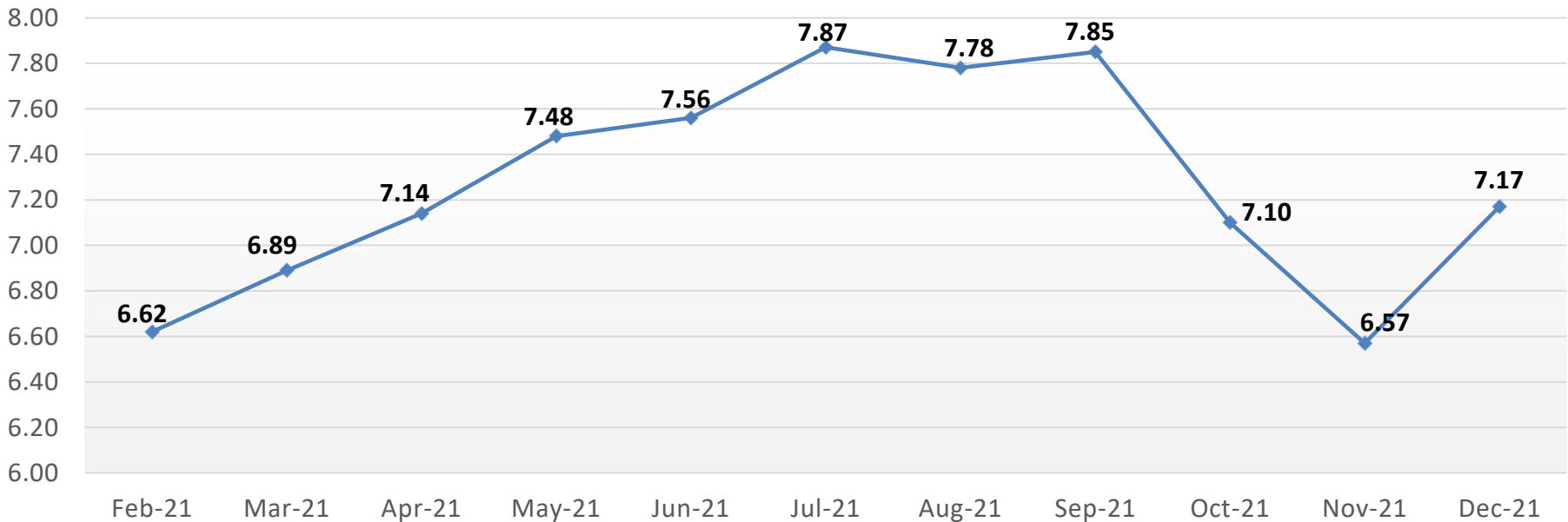


■ Increased ■ Stayed the same ■ Decreased

Business optimism

- The English Riviera optimism score clearly supports the pattern suggested across the year through the turnover data.

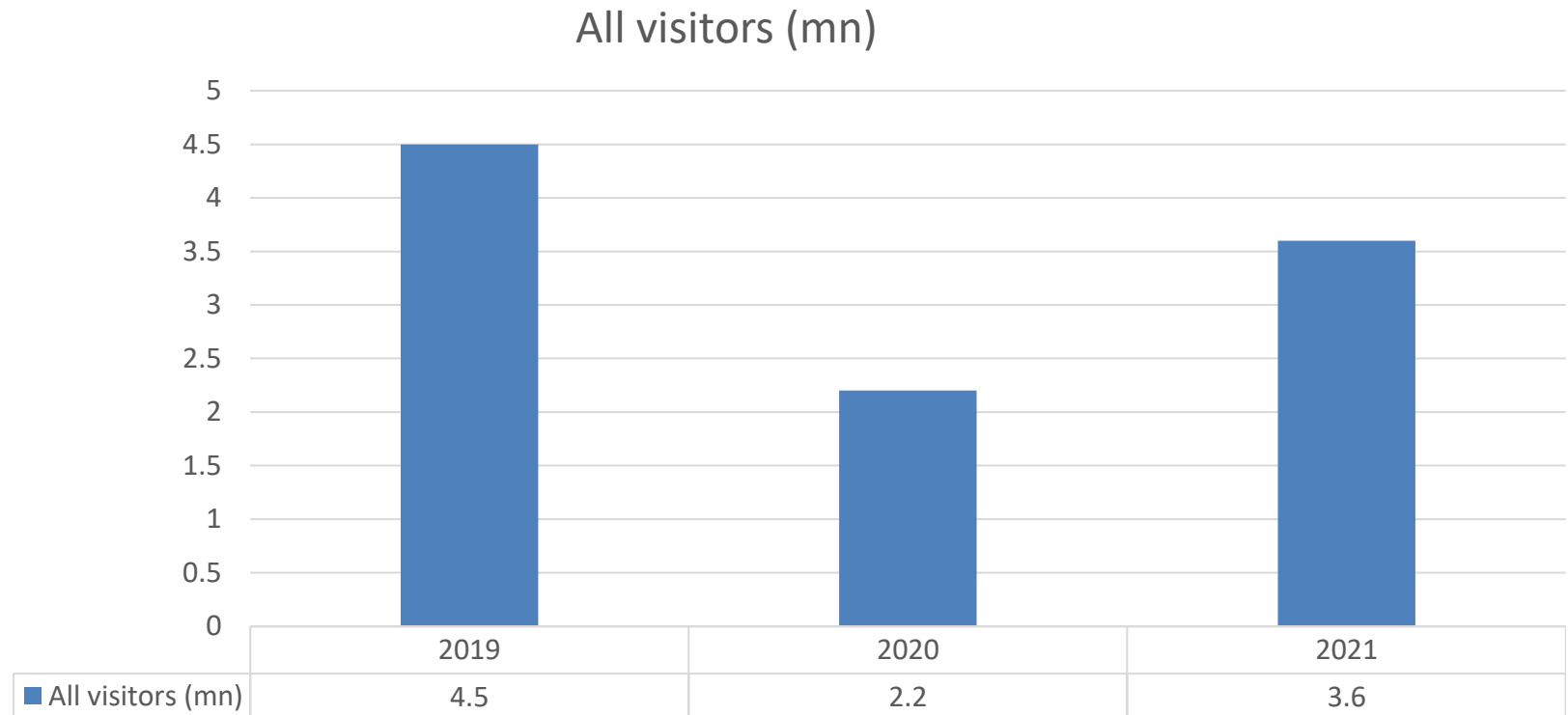
Business Optimism (maximum score of 10)



- National research by Visit England post 2021 confirmed that earlier travel restrictions resulted in a 'squeezed' trip taking window later in 2021 which created an artificially high benchmark for domestic summer.

2021 all visitors (day and staying)

- The graph clearly shows the start of the recovery in visitor numbers in 2021 (+62% compared to 2020).
- However, visitor numbers in 2021 were still 20% lower than pre-pandemic (2019).



2021 all visitor spend (day and staying)

- The graph again shows the start of the recovery for all visitor spend in 2021 (+68% compared to 2020).
- However, visitor spend in 2021 was still 23% lower than pre-pandemic (2019), which can be attributed to Covid restrictions but also reduced capacity in accommodation, restaurants, bars etc.



2021 performance – other key estimates

In 2021 on the English Riviera it is estimated that;

- Domestic staying trips to the English Riviera were 15% lower than in 2019 and spend 17% lower.
- Overseas visits were massively impacted in 2020 and 2021 due to travel restrictions. In 2021 overseas trips were 84% lower than in 2019 and spend 82% lower and largely consisted of trips to this country to see friends and relatives.
- All staying visitors combined (UK plus overseas) were 20% lower than in 2019 and spend 25% lower.
- Day visits to the English Riviera in 2021 were estimated to be 20% lower than in 2019 and day visitor spend 16% lower.

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2021 overview

