

# English Riviera

## Tourism overview

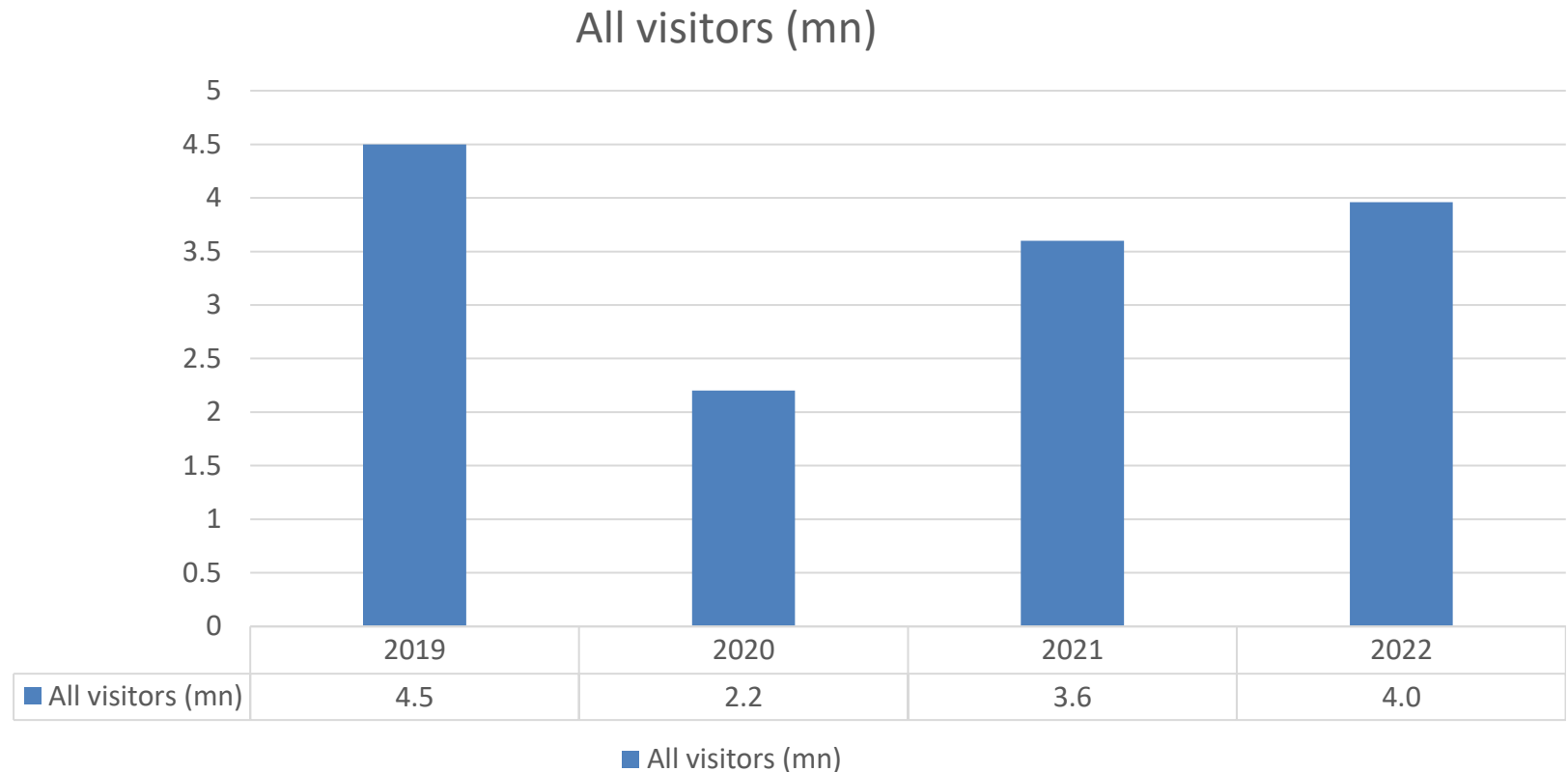
Prepared by The South West Research Company Ltd

March 2024



## 2022 visitor volume – all visitors (day and staying)

- The graph clearly shows the recovery in visitor numbers post Covid with increases in 2021 (+62% compared to 2020) and 2022 (+10% compared to 2021).
- However, visitor numbers in 2022 were still 13% lower than pre-pandemic (2019).



## 2022 visitor spend – all visitor spend (day and staying)

- The graph again shows the recovery post Covid for all visitor spend with increases in 2021 (+68% compared to 2020) and 2022 (+22% compared to 2021).
- However, visitor spend in 2022 was still 5% lower than pre-pandemic (2019), despite rising inflation as visitors became more cash conscious in their leisure time.



## 2022 visitor volume and value - other key estimates

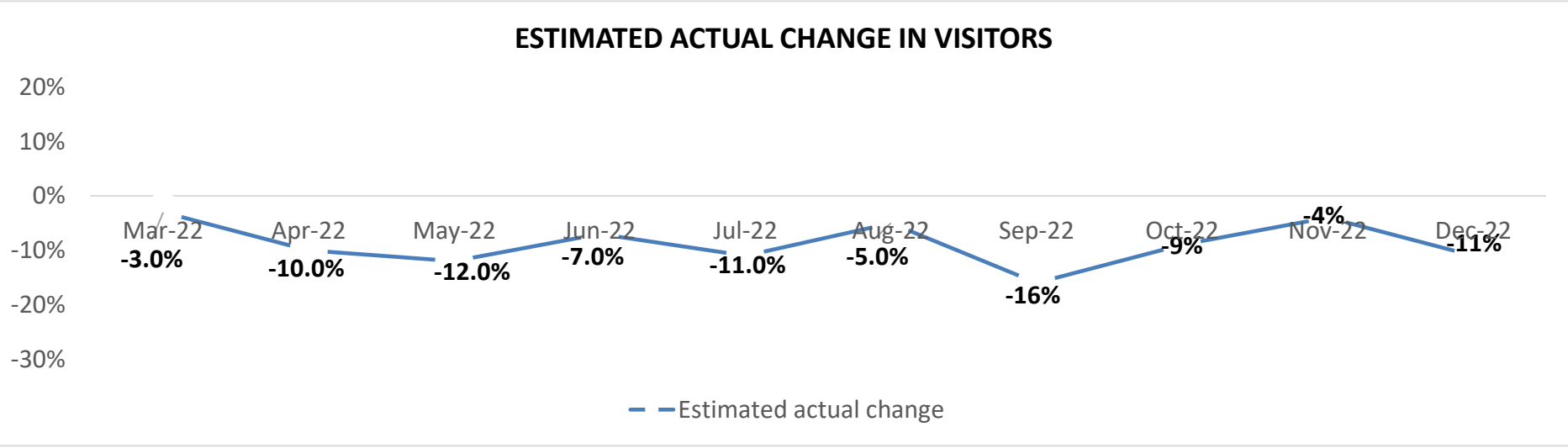
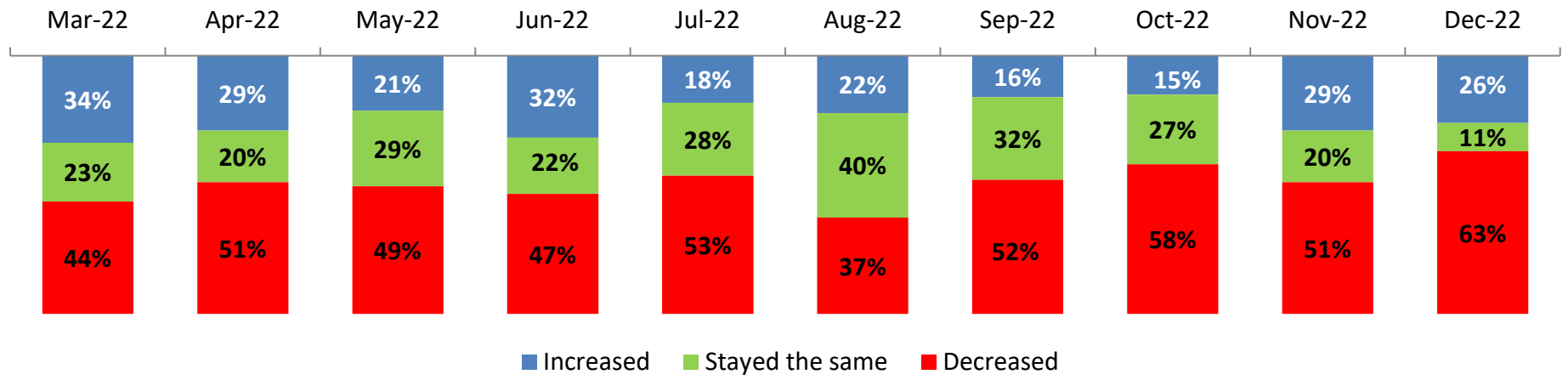
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### In 2022 on the English Riviera it is estimated that;

- Domestic trips to the English Riviera were 16% lower than in 2019 and spend 5% lower.
- Overseas visitors were on the increase again after huge decreases in 2020 and 2021 due to Covid-19 travel restrictions. However, in 2022 overseas trips were still 31% lower than in 2019 and spend 17% lower.
- All staying visitors combined (UK plus overseas) were 17% lower than in 2019 and spend 6% lower.
- Day visits to the English Riviera in 2022 were estimated to be 12% lower than in 2019 and day visitor spend 3% lower.

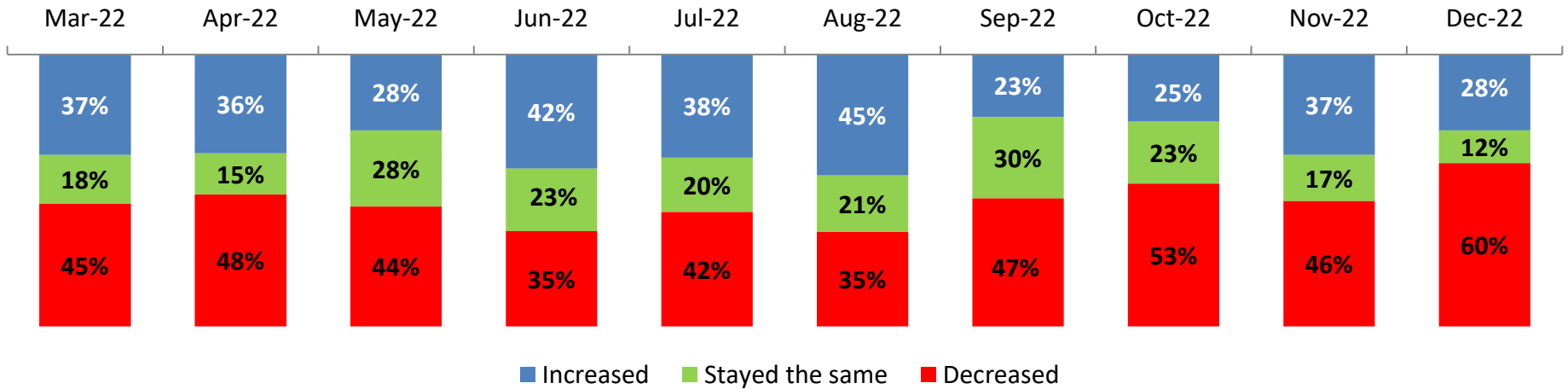
# How's Business Performance – Number of visitors in 2022 compared to 2019

- Local business survey confirms decreases in visitor numbers across the year compared to 2019.

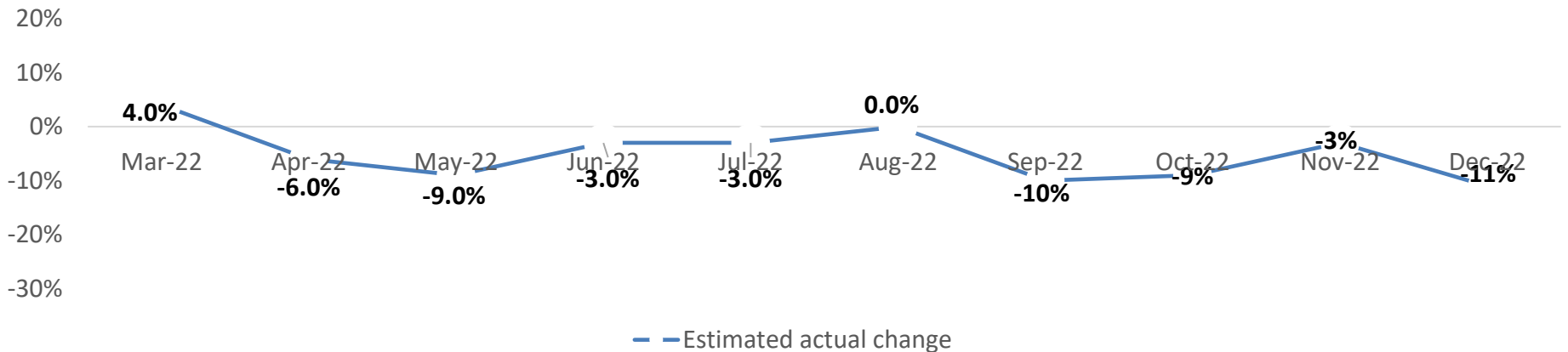


# How's Business Performance – Business turnover in 2022 compared to 2019

- And also confirms decreases in business turnover across the year compared to 2019, except for March (+4%) and August (no change). Decreases were proportionately smaller than decreases in visitors.

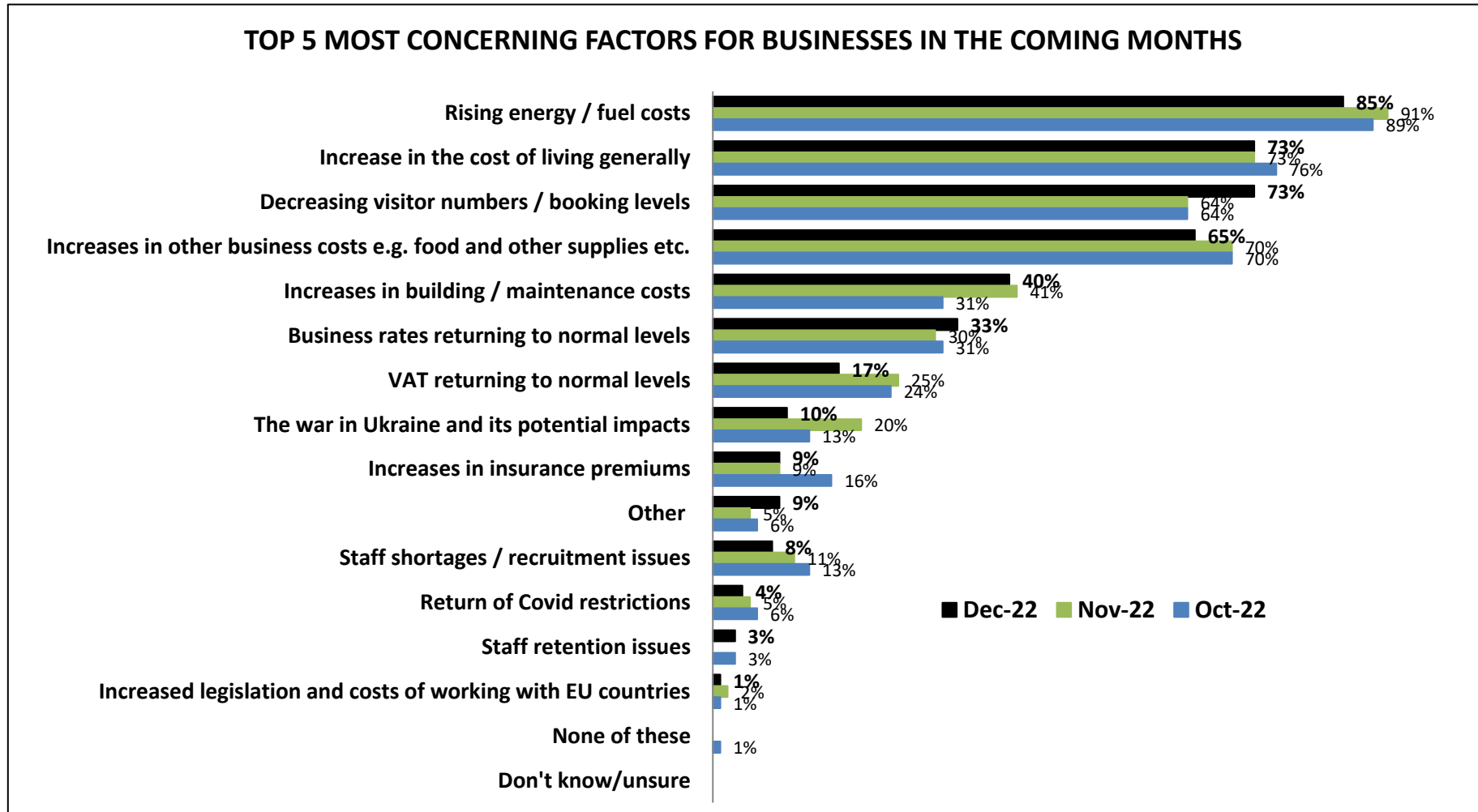


**ESTIMATED ACTUAL CHANGE IN TURNOVER**



## Top 5 business concerns (pre-defined list)

- Increases in business and the cost of living, alongside decreasing visitor numbers/bookings dominated business concerns in the last quarter of 2022.



# National confirmation

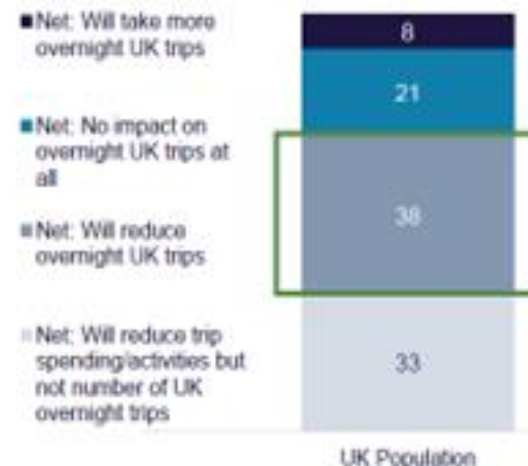
- The VisitEngland sentiment tracker from July 2022 confirmed a reduction in trip taking and consumers cutting back. The cost of living crisis was already firmly in consumers minds by mid-2022.

**The 'cost of living' crisis may be one of these circumstances – back in July this year 38% stating they will reduce the number of domestic trips as a result of financial pressures.**

Figure 19. 'Cost of living' impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Full list



Figure 20. 'Cost of living' impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Net

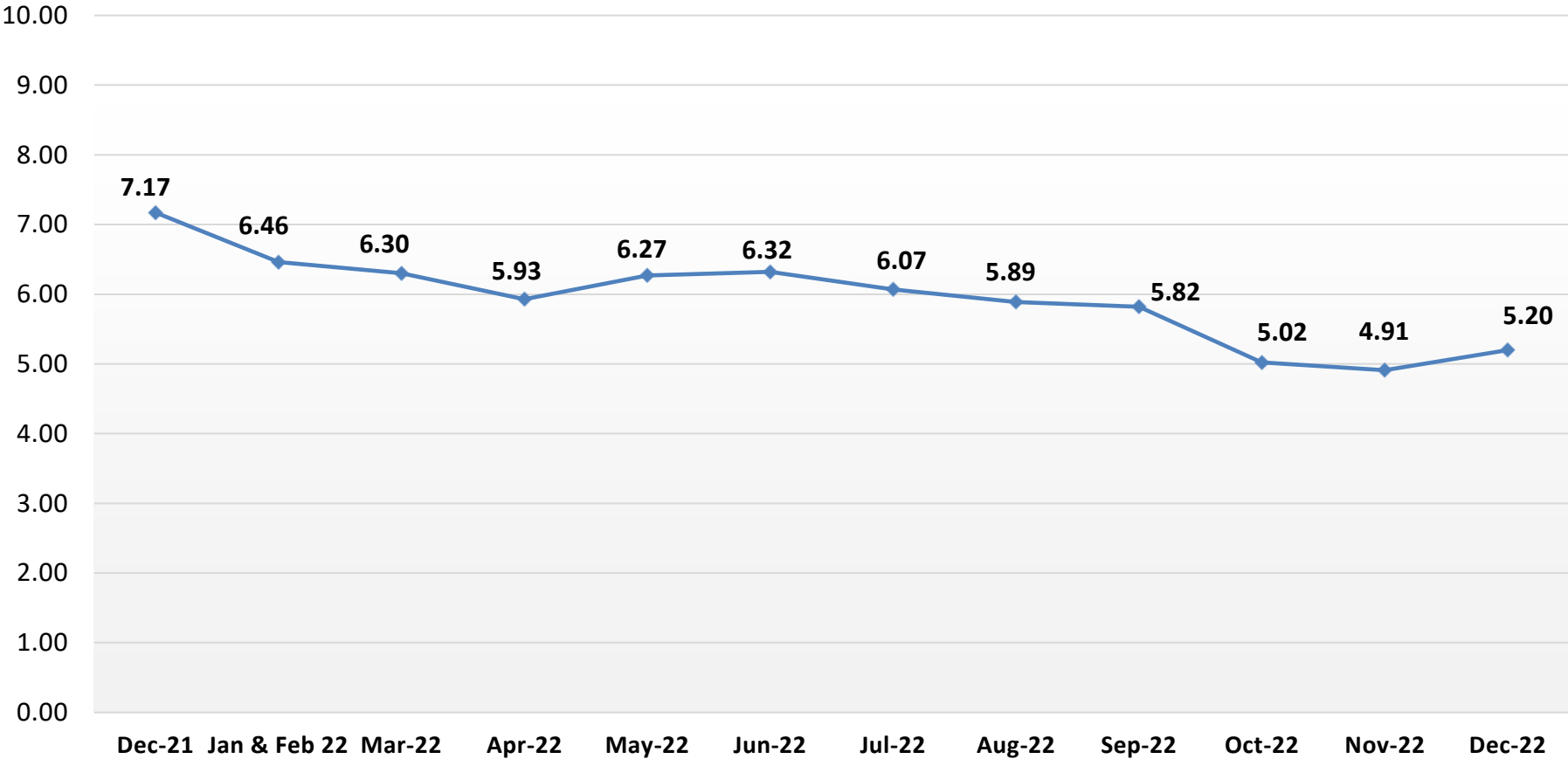




# Business optimism

- The English Riviera How's Business optimism score decreased fairly steadily across the year supporting the decreases in business levels suggested.

**BUSINESS OPTIMISM (MAXIMUM SCORE OF 10)**



## The national outlook 2023 - GBTS

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- The Great Britain Tourism Survey (GBTS) measures domestic overnight volume and value. Currently data is available to the end of Q3 2023 which estimates that for England overall, comparing to the same period for 2022, trips were 2% lower and spend 1% higher.
- However, and perhaps more relevant to the South West, holiday trips in England to the end of Q3 2023 were 13% down on the same period in 2022 and spend was 12% down. Anecdotal evidence suggests it's unlikely that Q4 data will improve this picture.
- For the same period looking specifically at the South West, the survey estimates that trips were down by 6% and spend by 7% compared to 2022.
- A regional breakdown by trip type isn't yet available but the regions' performance overall is below the national picture for 2023 which could be driven by the national decrease in holiday trips.
- Domestic staying visits to Torbay account for 93% of all staying trips in the area and 89% of all staying spend.

## The national outlook 2023 - IPS

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- The International Passenger Survey (GBTS) measures the volume and value of overseas staying visits to the UK. Currently data is available to the end of Q3 2023 which estimates that for England overall, comparing to the same period for 2022, overseas trips were 30% higher and spend 27% higher.
- Looking at trips types again, overseas holiday trips in England to the end of Q3 2023 were 40% up on the same period in 2022 and spend was 42% up.
- For the same period looking specifically at the South West the survey estimates that overseas trips were up by 23% and spend up 21% compared to 2022.
- Overseas holiday trips were 43% higher at the end of Q3 2023 compared to the same period in 2022 and spend 40% higher.
- Overseas staying visits to Torbay account for 7% of all staying trips in the area and 11% of all staying spend so whilst the above outlook is promising it only accounts for a relatively small proportion of staying visitor activity in the area.

## What can we expect for 2023?

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- Data from the English Riviera How's Business survey full year overview is still being analysed, figures are available later this month.
- However, provisional data and previous monthly reports for 2023 suggest that we can expect decreases in visitor volumes and turnover for the year compared to 2022 and, as such, both measures will remain lower than pre-pandemic levels (2019).
- Considering both local, regional and national data available we would anticipate decreases of 10% or more for both visitors and turnover for the English Riviera compared to 2022.
- The decrease in visitors is likely to be larger than the decrease in turnover which is partially influenced by inflation.
- Compared to 2022 decreases reported in average length of stay and average spend per person in 2023.

## What can we expect for 2024?

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- Rising costs across all business related aspects and the cost of living generally, alongside decreasing visitor numbers/bookings were the main concerns for local businesses on the Riviera at the end of 2023 and this shows no signs of changing in the immediate future.
- The latest VisitEngland sentiment tracker (February 24) stated “Due to the cost-of-living crisis, most of UK adults (70%) are either ‘cautious and being very careful’ (49%) or have been ‘hit hard and are cutting back’ (21%).
- As such, the prospects for a return to pre-pandemic tourism activity levels in 2024 would appear to look very unlikely at present.
- However, a large proportion of visitors are very loyal to the area and will continue to come if they are able. The ability to influence and generate new business and convert possible visitors into actual visitors will ultimately determine how the year fares overall.

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Tourism overview

