The English Riviera Visitor Survey 2022

Final Report

Produced for and on behalf of The English Riviera BID Company

by The South West Research Company Ltd.

December 2022

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Key Findings

This report presents the findings of The English Riviera Visitor Survey 2022 from an online survey conducted amongst the ERBID's consumer email database during October and November 2022. The survey achieved a sample of 1,177 respondents (aged 16+ years), 1,133 of whom had visited the resort and 605 who had done so during 2022. The survey was undertaken by The South West Research Company Ltd. on behalf of The English Riviera BID Company (ERBID).

The main focus of the research was to capture data from visitors to the resort during 2022, a more 'normal' year for tourism again after the restrictions and lockdowns of 2020 and 2021 due to the Covid-19 pandemic.. The key findings from the research are as follows:

Visitor Profile

- 55% were female and 44% were male.
- 80% had no dependent children living with them in their household.
- 46% were retired with a company/private pension and 36% were in full-time or part-time employment.
- 74% were aged 55 years or over including 44% who were aged 65+ years and 30% who were aged 55-64 years. 21% were aged 54 years or under.
- 99% were UK residents. 25% of these lived in the South West region including approximately 5% who lived in the Gloucester 'GL' postcode area and approximately 4% in the Bristol 'BS' postcode area.
- 74% lived elsewhere outside the South West region including approximately 6% who lived in the Birmingham 'B' postcode area, 4% who live in the Dudley 'DY' postcode area and 3% in the Sheffield 'S' postcode area.
- 1% were from overseas (5 respondents).
- 56% had visited The English Riviera in a couple (husband/wife/partner) whilst 25% had done so as part of an immediate family group (husband/wife/partner/children).
- 88% were staying overnight in the resort. The average duration of stay was 6.92 nights.
- 95% were on a repeat visit to The English Riviera and just 5% were first time visitors to the resort.

Key Findings

Characteristics of Visits

- 26% of 2022 visits took place during September and 22% in each case during August and June.

- 90% had visited The English Riviera as part of a leisure/holiday related trip. 7% were visiting friends or relatives.

- 42% of staying visitors had stayed in accommodation in Torquay and 32% in Paignton. 12% stayed in Brixham and 6% in Babbacombe. 8% stayed in another location on The English Riviera.

- 58% of staying visitors had used serviced accommodation in the resort whilst 23% had used self catering accommodation.

Information Sourcing & Booking Patterns

- 50% of staying visitors had booked their accommodation more than 12 weeks in advance of their visit including 24% 3-6 months in advance of their visit, 21% 7-12 months in advance of their visit and 5% more than 12 months in advance of their visit. 43% booked up to 12 weeks in advance of their visit.

- 66% of staying visitors booked directly with their accommodation provider, 17% booked through an online travel agent (OTA) and 7% through an agency. 12% booked via another method including through family or friends and via their coach operator.

- 66% of those using an OTA to book their accommodation had used Booking.com and 11% Hotels.com. 8% had used Airbnb, 4% Vrbo and 3% had used Expedia. 7% had used another OTA including Cottages.com and Hoseasons.

- 53% of visitors had sourced information about The English Riviera to assist them either before or during their visit.

- 58% of visitors who had sourced information about The English Riviera to assist them either before or during their visit had done so up to 12 weeks in advance including 26% up to 4 weeks prior to their visit. 37% sourced their information more than 12 weeks before their visit.

- 84% of visitors who had sourced information about The English Riviera to assist them either before or during their visit had done so on the internet (including social media and apps). 38% had used a brochure/leaflet/guide to source their information (the majority mentioning The English Riviera Official Guide) and 35% had used a tourist information centre.

- 88% of visitors who had sourced information about visiting The English Riviera on the internet had used the www.englishriviera.co.uk website and 49% the www.visitdevon.co.uk website. 32% used review websites such as TripAdvisor and 31% their accommodation providers' website. 19% used a social media site such as Facebook/Twitter/Instagram.

Key Findings

- 30% of visitors preferred to use their mobile phone to source and/or book their leisure related trips/activities online. 25% preferred to use a laptop computer, 19% a tablet and 15% a desktop computer. 8% had no preference and 2% said they did not source information or book online.

- 62% of visitors used Facebook, 36% YouTube, 22% Instagram and 15% Twitter, 3% used Tik Tok, 2% Snapchat and 1% another social media channel including WhatsApp and LinkedIn. Around a quarter of visitors (26%) said they did not use social media channels.

- 67% of visitors who had used social media channels said they had some level of influence on them when deciding which events to attend, 64% when deciding where to eat & drink, 55% when choosing which destinations to visit and 41% when deciding which types of accommodation to use.

Activity Taking

- By far the most popular activities were eating & drinking (81% took part including 13% for whom it was their main reason for visiting), shopping (65% took part including 6% for whom it was their main reason for visiting), visiting local attractions/places of interest (63% took part including 27% for whom it was their main reason for visiting) and visiting the beach/sea (63% took part including 21% for whom it was their main reason for visiting).

- In terms of activities/experiences which visitors hadn't taken part in during their visit to The English Riviera, but which appealed to them, live theatre/music/comedy events was most appealing (56%), followed by outdoor sports/pursuits (48%), attending local events (45%) and/or taking part in water-based activities (43%).

Blue Flag Scheme for Beaches

- For the first time during the 2022 survey, visitors were asked about their awareness of the Blue Flag scheme for beaches. 94% of visitors said they were aware of the scheme.

- 35% of visitors said they had been onto a beach with a Blue Flag during their visit to The English Riviera. A further 32% did not know/were unsure if they had done.

- 19% of visitors said having a Blue Flag beach award had influenced their decision to visit the English Riviera.

Key Findings

Visitors' Opinions of The English Riviera

- With the exception of parking and all aspects of value for money, satisfaction levels overall were high.

- Staying visitors had higher satisfaction levels than day visitors.

- With the exception of accommodation, on the whole first time visitors typically had higher satisfaction levels than repeat visitors to the resort.

- Overall enjoyment of visit, the quality of service at accommodation, general atmosphere, quality of the beaches on The English Riviera and feeling of welcome were the top five ranked categories out of the twenty eight explored by the survey.

- Of the bottom five categories, with scores of 3.60 or less, the bottom three were related to parking and the fourth and fifth to shopping.

- The beaches were the main highlight of a visit to The English Riviera. The cost/availability of parking was the biggest disappointment for visitors to the Riviera and also the main factor they would like to see improved.

- The English Riviera achieved an overall Recommendation Score of +62% (compared with +61% during 2021 survey).

- 80% of all survey respondents, who had visited the resort during 2022, said they definitely will visit The English Riviera in the future.

- 34% of respondents who said they would definitely visit the resort in the future said they had booked to visit in 2023.

- The largest proportion, 30% in each case, said they would be visiting in July and/or August 2023, 29% in September 2023, 25% in June 2023 and 22% in May 2023.

- The top three barriers to taking a UK short break or holiday in the next 6 months were; the rising cost of living (50%), the cost of fuel (42%) and the rising costs of holiday/leisure (41%).

- As a result of the 'cost of living crisis', 46% of visitors said they will spend less on eating out and 40% will look for more 'free things' to do. 25% will take fewer UK short breaks/holidays and 23% will take a holiday in the UK instead of overseas.

Lapsed/Non-Visitors

- By far the largest proportion of previous visitors to the resort who had not visited during 2022 (lapsed visitors) (51%) said they had not visited because they had visited other destination(s) Instead, 33% said it was due to the Covid-19 pandemic and 19% said it was due to a lack of money/available finances.

- 32% of all survey respondents in each case who had never visited The English Riviera said it was because they visited other destination(s) instead and/or it was because of the distance of the resort from their own home/too far to travel.

Conclusions

The findings from this report should, once again, offer the ERBID some valuable insights to use in their future marketing and communication strategies moving forward as the industry continues to return to the pre-pandemic levels of 2019. The key conclusions that we came to reading this report were;

2022 has seen an *increase* in the following results compared with the 2021 survey:

- Retired visitors (+8%) and those aged 65+ (+5%) - most likely as the result of more visitors within these two categories starting to have the confidence to venture out and take trips again after the pandemic.

- Visitors from the South West region (+5%) – whilst 2021 saw an increase in visitors from outside the South West visiting the resort most likely due to the restrictions on taking holidays abroad remaining in place, as many of these restrictions were lifted in 2022 and travelling abroad became much easier again, many of these visitors who may have been trying out the English Riviera as alternative for the first time during 2021, will have returned to having a foreign holiday.

- January to June and November trip taking (between 2-5%)– largely due to the restrictions which were in place during 2021 during this time of the year.

- Staying visitors using serviced accommodation (+5%) as more hotels, B&B and guest houses opened up fully again for the first time since the start of the pandemic and guests have become more confident in using them.

- Staying visitors booking direct with their accommodation provider (+4%) and is consistent with the findings above regarding increased serviced accommodation usage.

- Visitors sourcing holiday information more than 12 weeks in advance (+8%) and most likely as a result of visitors being able to plan their trips properly again once all the Covid-19 restrictions were lifted.

- The proportion of visitors attending live theatre/music/comedy events and local events (+5% and +4% respectively) and the direct result of the lifting of the Covid-19 restrictions on social distancing compared with 2021.

- With the exception of accommodation, on the whole first time visitors typically had higher satisfaction levels than repeat visitors to the resort for the first time.

- Overall recommendation score of +62% (+61% in 2021).

- The proportion of survey respondents who had visited the resort during 2022 who said they definitely will visit The English Riviera in the future (+8%).

Conclusions

Overall;

- Whilst visitors' high levels of enjoyment with their visit to the English Riviera have continued during 2022, they have, overall, decreased slightly compared with 2021 levels. Nonetheless, their satisfaction scores for the areas which relate to the holiday experience such as overall enjoyment of visit, general atmosphere and feeling of welcome have, once again, all featured in the top five satisfaction factors ranked by the survey, and this provides a very good indication that overall visitors continue to be highly satisfied with their visitor experience on The English Riviera.

- Whilst, overall, first time visitors typically had higher satisfaction levels than repeat visitors to the resort for the first time, this was not the case for their opinions of their accommodation. As this is such a key component of any staying visit, poor quality can impact upon the whole visit and the general impression of an area making it vitally important that this aspect is well received amongst first time visitors (as well as those who have visited before) to ensure they want to make a return visit again in the future and become regular repeat visitors.

- As was the case during 2021, the suggestions for improvements continue to centre around parking, the shopping facilities and nightlife/evening entertainment but the challenges in making any significant improvements to these areas remains. As a result, continuing to focus the main marketing campaigns around the main attractions for visiting the resort including the places to visit/things to see and do and the area's natural beauty such as the beaches (all of which again achieved high satisfaction scores) should ensure it offers something which appeals to everyone.

- When asked which factors they see as potential barriers to them taking a UK short break or holiday in the next 6 months, over half of all survey respondents did not say the 'cost of living crisis', instead choosing many of the other responses instead. So whilst there will inevitably be an impact, it's not impacting the majority of people at the moment. What is more likely to be the case is that those choosing to take a UK short break or holiday in the next 6 months will be more cautious with their spending and any potential loss in UK short break/holiday taking as a result of the 'cost of living crisis' may be negated by a possible increase in visitors choosing to holiday in the UK instead of going abroad, albeit with possibly a shorter length of stay.

- Amongst lapsed and non-visitors, reassuringly there do not appear to be any major issues preventing visits that the ERBID are able to influence. Amongst the small proportion with a negative view, many issues with a previous visit were centred largely around Covid issues and amongst non-visitors with the distance of the resort from their own home/too far to travel, both of which are things outside the influence of the ERBID to be able to control.

The English Riviera Visitor Survey 2022

Introduction

Background and methodology

This report presents the findings of The English Riviera Visitor Survey 2022. The survey was undertaken by The South West Research Company Ltd. on behalf of The English Riviera BID Company (ERBID).

The main focus of the research was to capture data from visitors to the resort during 2022, a year when the ongoing Covid-19 pandemic and its restrictions which were in place for some of the year continued to impact on leisure visits to The English Riviera, to explore the types of people visiting and their experience to help the ERBID with its' future strategy planning. The survey explored a wide range of topics including, amongst other things, the profile of visitors to The English Riviera during 2022, the characteristics of their visits, information sourcing and booking patterns, participation levels in activities and visitor satisfaction levels with various aspects of their experience.

This report contains the key findings from an online survey based on a total sample size of 1,177 respondents (aged 16+ years) conducted amongst the ERBID's consumer email database during October and November 2022, 1,133 of whom had visited the resort and 605 of whom who had done so during 2022.

The specific objectives of the 2022 research were :

➢ To provide information on the origin and profile of visitors to The English Riviera specifically during 2022, and to explore the nature of their trips to the resort during the year.

➢ To establish visitors' information sourcing and booking patterns before and during their holiday.

➢ To ascertain detailed information about internet usage amongst visitors to the resort including the use of different electronic devices and social media channels.

➢ To explore visitors' opinions of their visit to the resort and ascertain their levels of satisfaction with their visitor experience whilst on holiday.

➢ To compared with the results from the 2021 online visitor survey to identify any emerging trends.

Sample profile

How would you describe your gender?	Count	%
Male	549	47%
Female	616	52%
I would prefer not to answer this question	11	1%
I would prefer to self describe	1	0%
Total Responses	**1,177**	**100%**

What was your age on your last birthday?	Count	%
16-24 years	0	0%
25-34 years	10	1%
35-44 years	36	3%
45-54 years	187	16%
55-64 years	347	29%
65+ years	552	47%
I would prefer not to answer this question	45	4%
Total Responses	**1,177**	**100%**

Do you have dependent children living with you in your household?	Count	%
Yes - pre school age	11	1%
Yes - school age	103	9%
Yes - no longer at school	100	8%
No	955	81%
I would prefer not to answer this question	36	3%
Total Responses*	**1,205**	**100%**
*Multiple response question		

Do you live in the UK?	Count	%
Yes	1,144	97%
No	30	3%
I would prefer not to answer this question	2	0%
Total Responses	**1,176**	**100%**

Sample profile

Which of the following categories applies to the chief income earner in your household?	Count	%
Employed full-time (30+ hours per week)	334	28%
Employed part-time (8-29 hours per week)	82	7%
Self-employed	57	5%
Retired with company/ private pension	406	34%
Unemployed less than 6 months	7	1%
Full-time student	0	0%
Unemployed more than 6 months	27	2%
Retired with state pension only	150	13%
Working less than 8 hours week	6	1%
I would prefer not to answer this question	108	9%
Total Responses	**1,177**	**100%**

Have you ever visited The English Riviera for a leisure day out and/or stayed overnight in the resort (not in your own home)?	Count	%
Yes	1,133	96%
No	44	4%
Total Responses	**1,177**	**100**

When was your LAST leisure visit to The English Riviera?	Count	%
2022	**605**	**54%**
2021	149	13%
2020	65	6%
2019	104	9%
2018	37	3%
2017	32	3%
Before 2017	118	11%
Don't know / can't recall	4	0%
Total Responses	**1,114**	**100%**

96% of all respondents responding to the survey (1,133) had visited The English Riviera for a leisure day out and/or stayed overnight in the resort (not in their own home). 54% of these respondents (605 respondents) had last visited the resort during 2022.

Sample profile

For the purposes of the research and analysis, in the pages to follow the 2022 visitors have been categorised into four categories as follows:

- Day visitors – those on a day trip from home or visiting the resort for the day whilst staying overnight elsewhere outside The English Riviera during 2022 – a total of 73 respondents – 12% of the total sample. *Caution should be taken when interpreting the results for these respondents due to the small sample size.*

- Staying visitors – those staying overnight away from their own home on The English Riviera during 2022 – a total of 522 respondents – 88% of the total sample.

- First time visitors – 2022 visitors to the resort who had never previously visited The English Riviera – a total of 27 respondents – 5% of the total sample. *Caution should be taken when interpreting the results for these respondents due to the small sample size.*

- Repeat visitors – 2022 visitors to the resort who had visited the resort on a previous occasion – a total of 568 respondents – 95% of the total sample.

Unless otherwise stated, the results to follow in this report refer to current 2022 visitors to The English Riviera only cross-tabulated by the visitor segments detailed above (day or staying visitors and whether a first time or repeat visitor to the resort) where valuable to do so.

A separate analysis of the results for lapsed/non-visitors (528 respondents who had last visited the resort prior to 2022 and 44 respondents who had never visited) are provided in a separate chapter towards the end of the report (pages 95-98).

The English Riviera Visitor Survey 2022

Visitor Profile*

Those visiting during 2022 only (605 respondents)

55% were female, 44% were male.
80% had no dependent children living with them at home.

55% of all survey respondents who had visited The English Riviera during 2022 were female and 44% were male.

80% had no dependent children living with them in their household.

There was little variation in the results compared with the 2021 survey.

How would you describe your gender?

I would prefer not to answer this question, 1%

Male, 44%

Female, 55%

(N = 605)

Do you have dependent children living with you in your household?

Prefer not to answer	5%
No	80%
Yes - no longer at school	8%
Yes - school age	9%
Yes - pre school age	1%

0% 20% 40% 60% 80% 100%
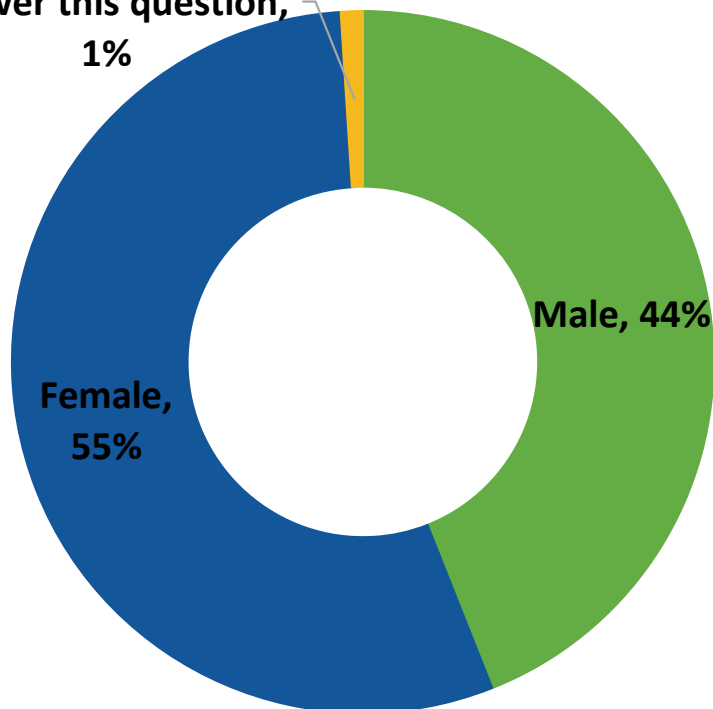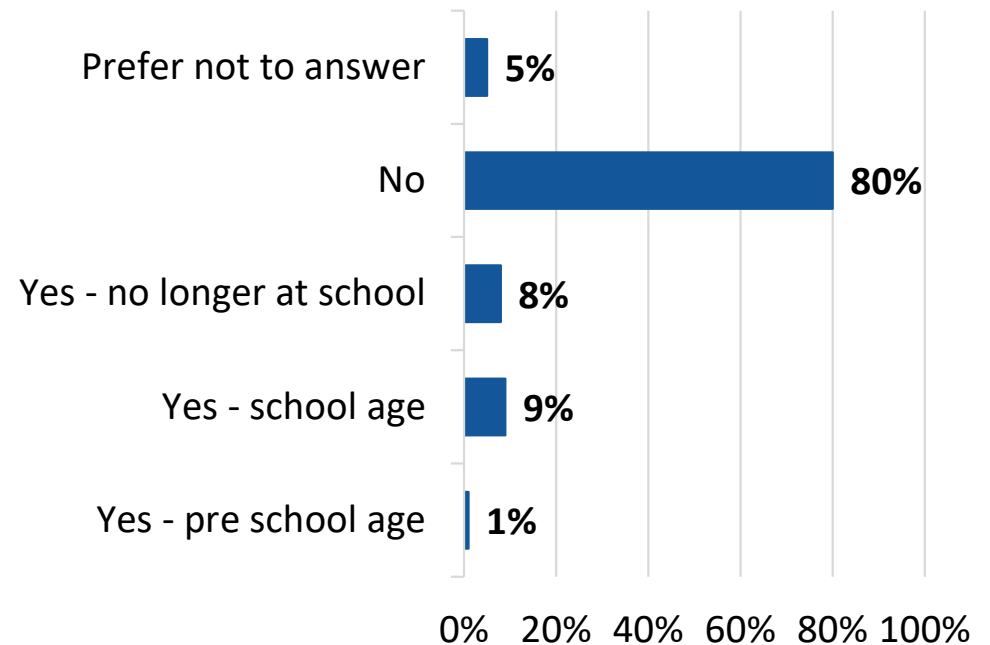
(N = 623, multiple response question)

16

46% were retired, 36% were in full-time or part-time employment.

46% of all survey respondents who had visited The English Riviera during 2022 were retired with a company/private pension (35%) or with a state pension only (11%). 29% were employed full-time (30+ hours per week) and 7% worked part-time (8-29 hours per week). 4% were self-employed, and 1% in each case had been unemployed for over 6 months or worked less than 8 hours per week.

10% preferred not to answer the question.

2022 saw a higher proportion of retired visitors to the resort (46%) compared with those visiting during 2021 (38%).

Which of the following categories applies to the chief income earner in your household?
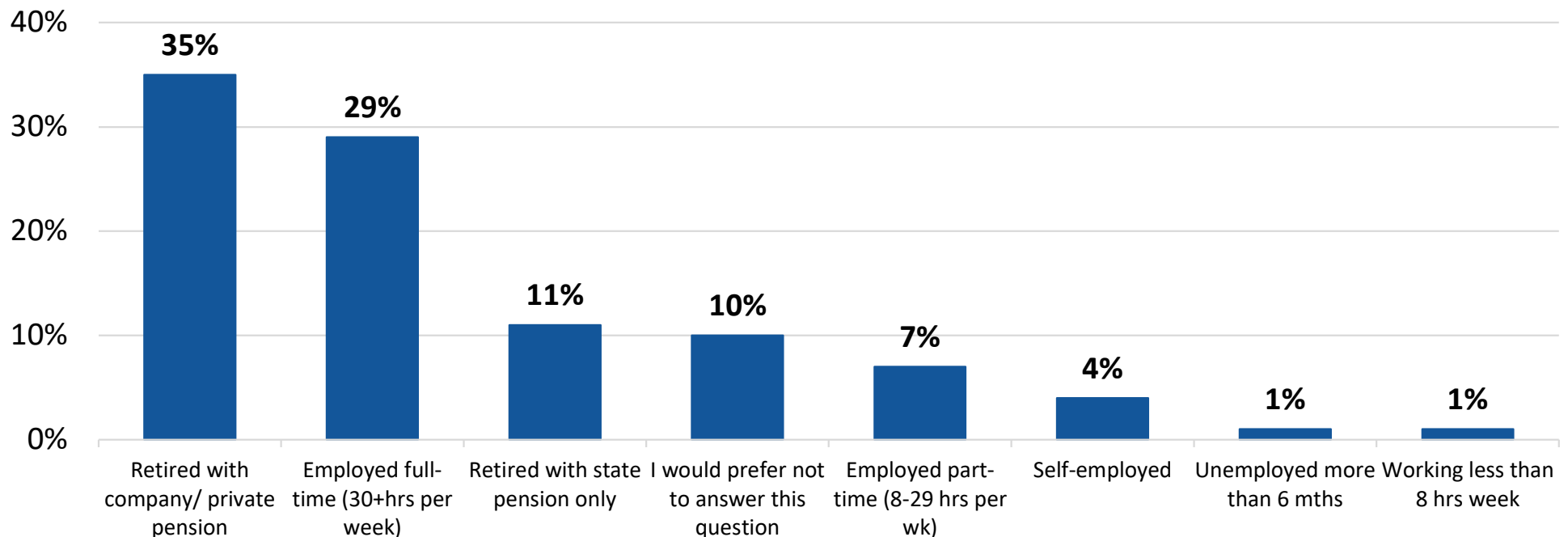
(N = 605)

74% were aged 55 years or over.

44% of all survey respondents who had visited the resort during 2022 were aged 65+ years and 30% were aged 55-64 years. 21% were aged 54 years or under including 17% aged 45-54 years, 3% 35-44 years and 1% aged 25-34 years.

5% preferred not to answer the question.

2022 saw a slightly higher proportion of visitors aged 65+ visiting the resort compared with 2021 (44% compared with 39%), consistent with the higher proportion of retired visitors to the resort during the year.

What was your age on your last birthday?

Age group	Percentage
25-34 years	1%
35-44 years	3%
45-54 years	17%
55-64 years	30%
65+ years	44%
I would prefer not to answer this question	5%

(N = 605)

18
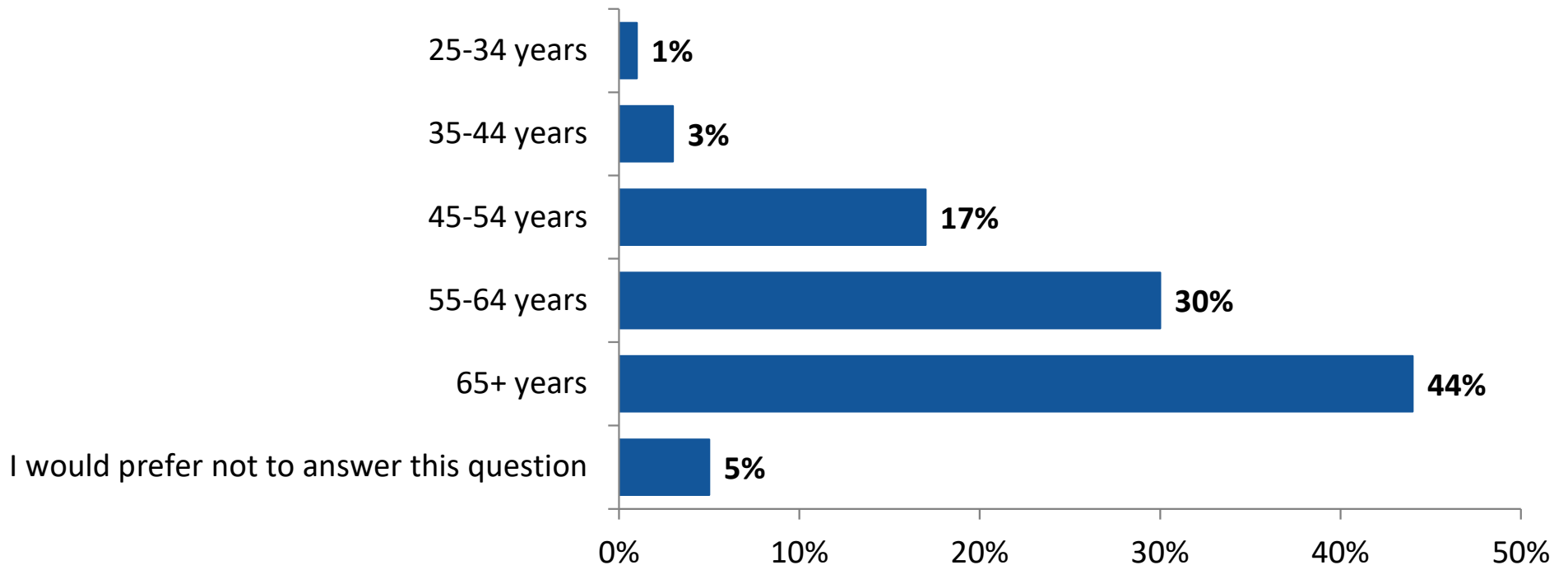
25% lived in the South West region.

99% of all 2022 visitors to The English Riviera were UK residents. 25% of these lived in the South West region including approximately 5% who lived in the Gloucester 'GL' postcode area and 4% in the Bristol 'BS' postcode area.

74% of 2022 visitors were UK residents who lived elsewhere outside the South West region including approximately 6% who lived in the Birmingham 'B' postcode area, 4% who live in the Dudley 'DY' postcode area and 3% in the Sheffield 'S' postcode area. The table below shows the postcode areas where approximately 2% or more of 2022 respondents came from.

1% of all visitors were from overseas (5 respondents).

2022 saw a 5% increase in the proportion of South West residents visiting the resort compared with 2021 (25% compared with 20%).

**Visitor origin
(based on home postcode)**

Overseas resident, 1%

South West resident, 25%

Other UK resident, 74%

(N = 587)
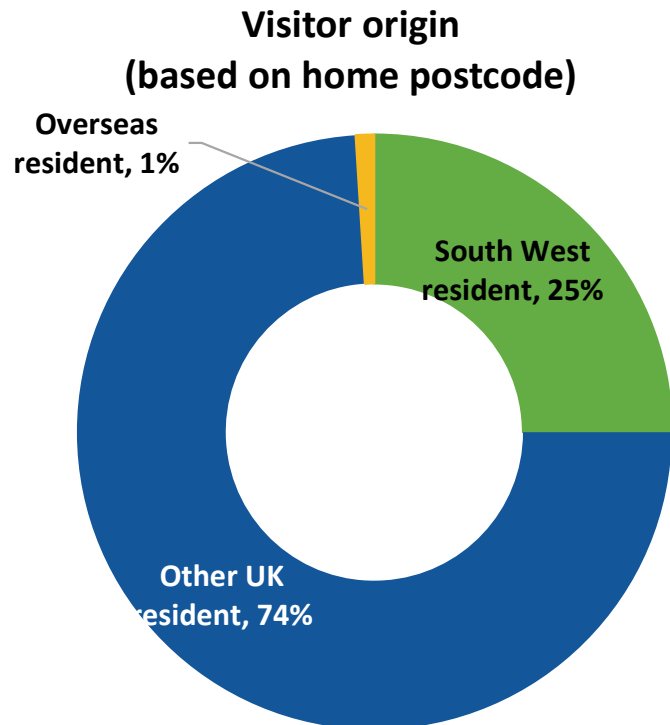
Postal area origin		% of 2022 visitors
B	Birmingham	6%
GL	Gloucester	5%
BS	Bristol	4%
DY	Dudley	4%
S	Sheffield	3%
PL	Plymouth	3%
EX	Exeter	3%
WV	Wolverhampton	3%
OX	Oxford	3%
TQ	Torquay	2%
DE	Derby	2%
LE	Leicester	2%
NP	Newport	2%

Map showing home postcode locations of visitors to The English Riviera.

The map below shows the home postcode locations of visitors to The English Riviera during 2022

Map showing home postcode locations of visitors to The English Riviera.

West and East Midlands and Northern regions home postcodes zoom map

Map showing home postcode locations of visitors to The English Riviera.

Southern regions home postcodes zoom map
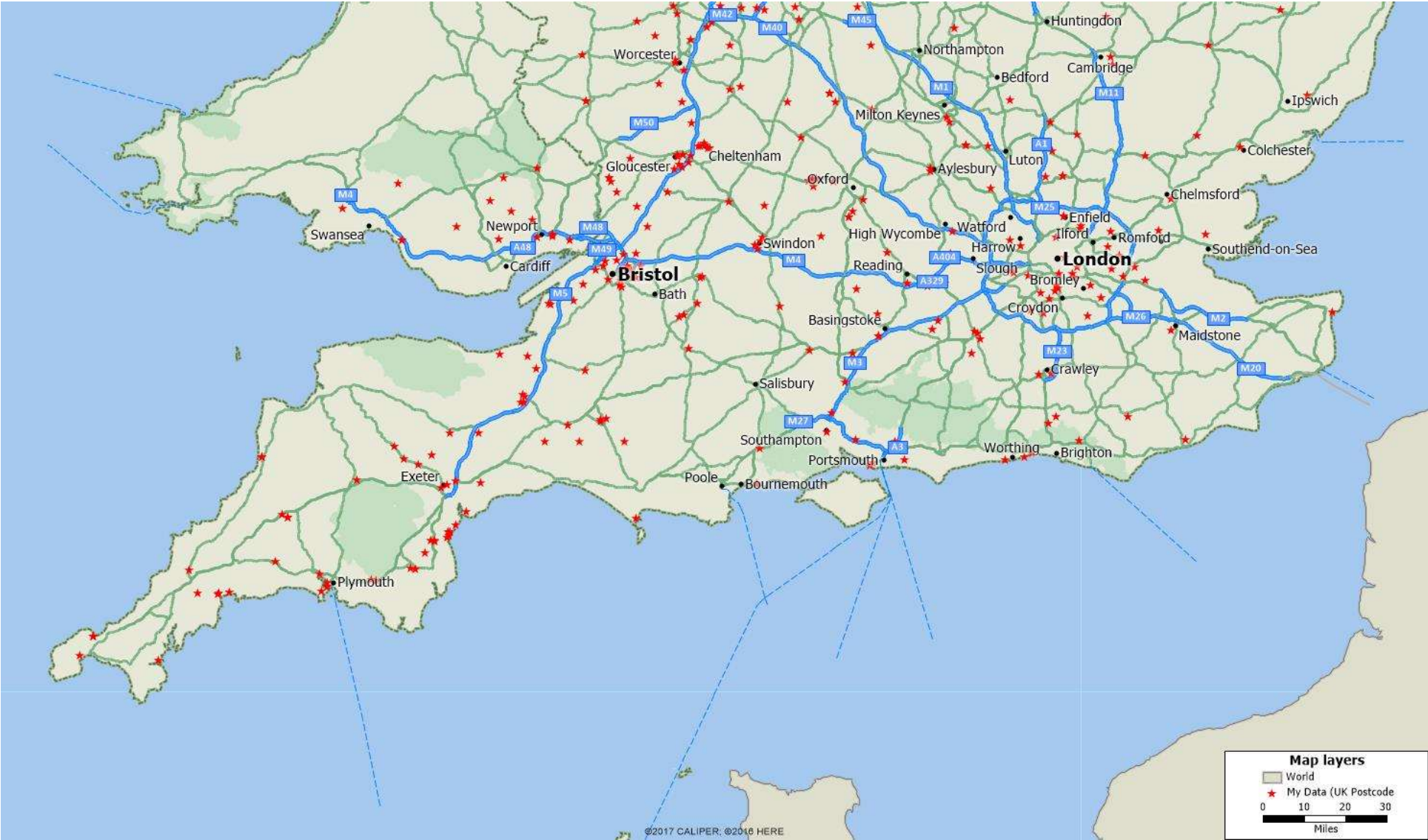
Couples and immediate family groups made up the large majority of visitors to the resort (81%).

Who did you visit The English Riviera with?
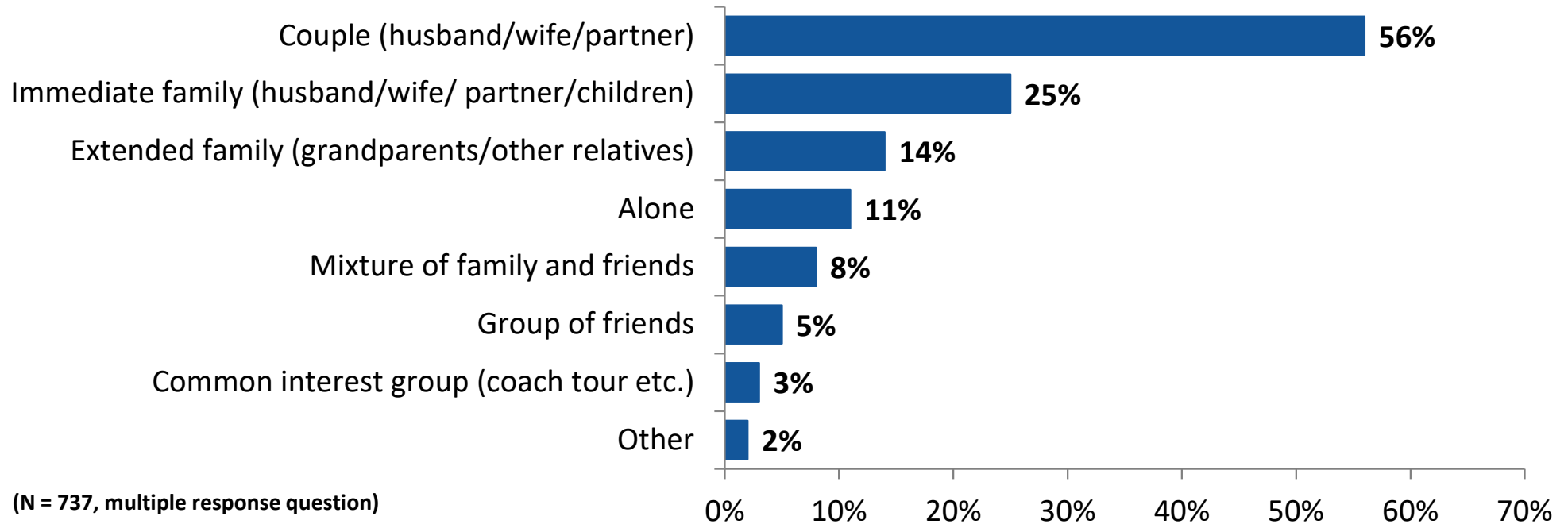
Visitor type	Percentage
Couple (husband/wife/partner)	56%
Immediate family (husband/wife/ partner/children)	25%
Extended family (grandparents/other relatives)	14%
Alone	11%
Mixture of family and friends	8%
Group of friends	5%
Common interest group (coach tour etc.)	3%
Other	2%

(N = 737, multiple response question)

56% had visited The English Riviera in a couple (husband/wife/partner) whilst 25% had done so as part of an immediate family group (husband/wife/partner/children). 14% had visited as part of an extended family group (grandparents/other relatives), 8% as part of a mixed group of family and friends and 5% as part of a group of friends.

11% had visited the resort alone, 3% as part of a common interest group and 2% in another group type.

There was little variation in the results compared with the 2021 survey findings.

88% were staying overnight in the resort.

The average duration of stay was 6.92 nights.

When you visited The English Riviera were you....?

Visiting from home for the day, 6%

Visiting for the day whilst on holiday staying elsewhere, 6%

Staying overnight away from your own home, 88%
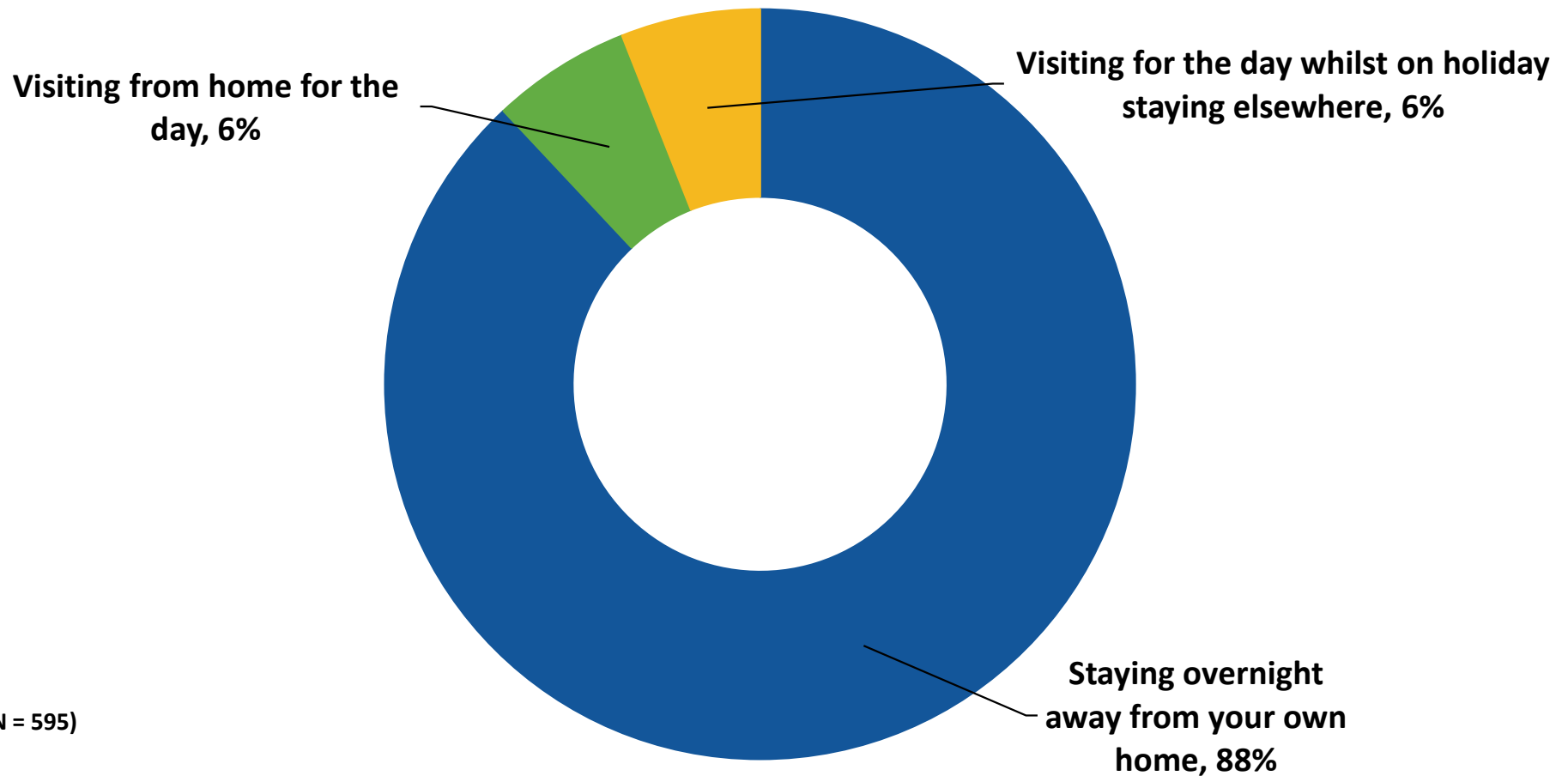
(N = 595)

There was little variation in the results compared with the 2021 survey findings.

95% were repeat visitors.

95% of all 2022 visitors were on a repeat visit to The English Riviera and just 5% were first time visitors to the resort.

2022 has seen a decrease in the proportion of first time visitors to the resort compared with 2021 (5% compared with 11%).

Was this your first leisure visit to The English Riviera?

(N = 715)
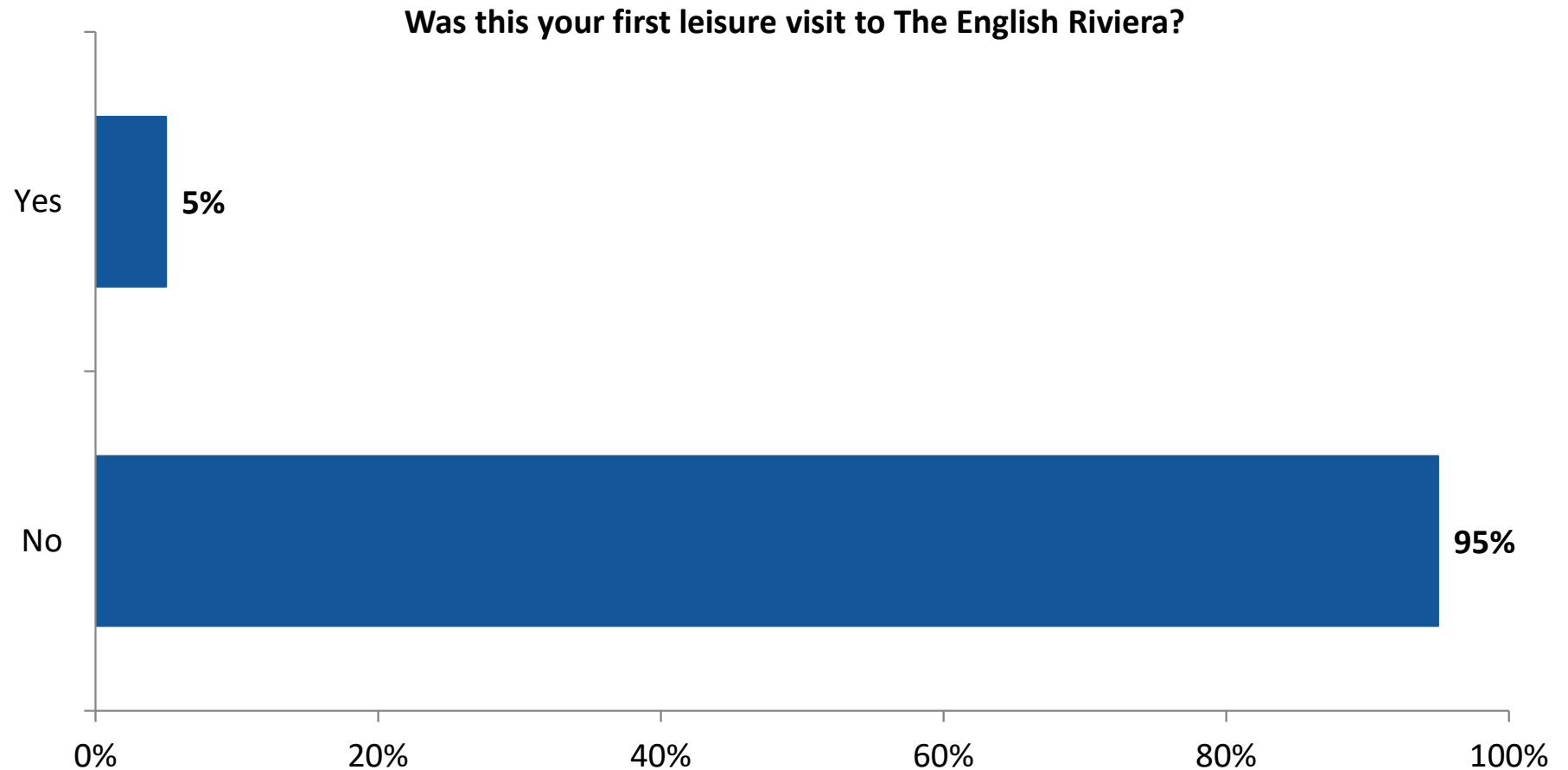
Visitor profile trend data 2022 vs 2021.

How would you describe your gender?	2021	2022
Male	46%	44%
Female	52%	55%
I would prefer not to answer this question	2%	1%
I would prefer to self describe	1%	0%

Do you have dependent children living with you in your household?	2021	2022
Yes - pre school age	1%	1%
Yes - school age	9%	9%
Yes - no longer at school	9%	8%
No	78%	80%
I would prefer not to answer this question	6%	5%

Which of the following categories applies to the chief income earner in your household?	2021	2022
Employed full-time (30+hrs per week)	37%	29%
Employed part-time (8-29 hrs per wk)	5%	7%
Self-employed	%	4%
Retired with company/ private pension	30%	35%
Unemployed less than 6mths	0%	0%
Full-time student	0%	0%
Unemployed more than 6 mths	1%	1%
Retired with state pension only	8%	11%
Working less than 8 hrs week	0%	1%
I would prefer not to answer this question	12%	10%

What was your age on your last birthday?	2021	2022
16-24 years	0%	0%
25-34 years	1%	1%
35-44 years	5%	3%
45-54 years	18%	17%
55-64 years	32%	30%
65+ years	39%	44%
I would prefer not to answer this question	5%	5%

Visitor profile trend data 2022 vs 2021.

Visitor origin	2021	2022
South West resident	20%	25%
Other UK resident	79%	74%
Overseas resident	1%	1%

Who did you visit The English Riviera with?	2021	2022
Alone	7%	11%
Couple (husband/wife/partner)	58%	56%
Immediate family (husband/wife/partner/children)	24%	25%
Extended family (grandparents/other relatives)	14%	14%
Mixture of family and friends	7%	8%
Group of friends	8%	5%
Common interest group (coach tour etc.)	1%	3%
Educational group	0%	0%
Don't know/can't recall	0%	0%
Other	3%	2%

When you visited The English Riviera were you....?	2021	2022
Staying overnight away from your own home	88%	88%
Visiting from home for the day	5%	6%
Visiting for the day whilst on holiday staying elsewhere	7%	6%

Was this your first leisure visit to The English Riviera?	2021	2022
Yes	11%	5%
No	89%	95%

The English Riviera Visitor Survey 2022

Characteristics of Visits*

Those visiting during 2022 only (605 respondents)

26% of 2022 visits took place during September and 22% in each case during August and June.

During which month(s) of 2022 did your visit to The English Riviera take place?

Month	%
Nov-22	5%
Oct-22	21%
Sep-22	26%
Aug-22	22%
Jul-22	19%
Jun-22	22%
May-22	14%
Apr-22	10%
Mar-22	7%
Feb-22	5%
Jan-22	4%
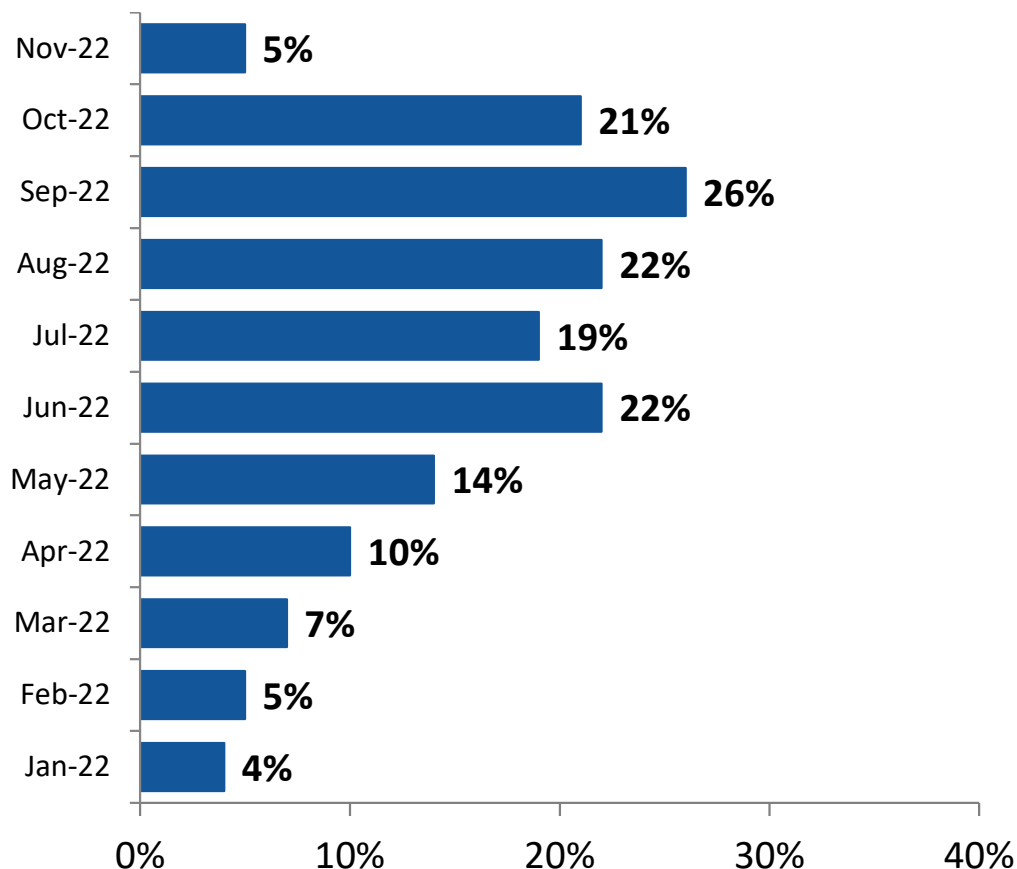
(N = 935, multiple response question)

The months of June to October were the most popular for visits regardless of visitor type and whether visitors were on a repeat visit or experiencing the resort for the first time.

Month of visit 2022	Day visitors	Staying visitors	First time	Repeat visitors
Jan	8%	3%	0%	4%
Feb	7%	5%	0%	5%
Mar	7%	7%	0%	8%
Apr	16%	9%	4%	10%
May	22%	13%	11%	15%
Jun	27%	22%	22%	22%
Jul	32%	18%	11%	20%
Aug	21%	22%	11%	23%
Sep	26%	26%	22%	26%
Oct	27%	20%	26%	21%
Nov	5%	5%	4%	5%

2022 saw a higher proportion of visitors to the resort during the months of January to June and November and lower proportions during the months of July to October compared with 2021 when Covid-19 lockdowns were still in place for much of the first six months of the year.

90% of visitors were on a leisure/holiday related trip.

What was the MAIN purpose of your visit to The English Riviera?

Leisure/holiday/festivals/events — **90%**
Visiting friends/family — **7%**
Shopping trip (special/non regular) — **1%**
Business/conference — **1%**
Other — **2%**

(N = 595)
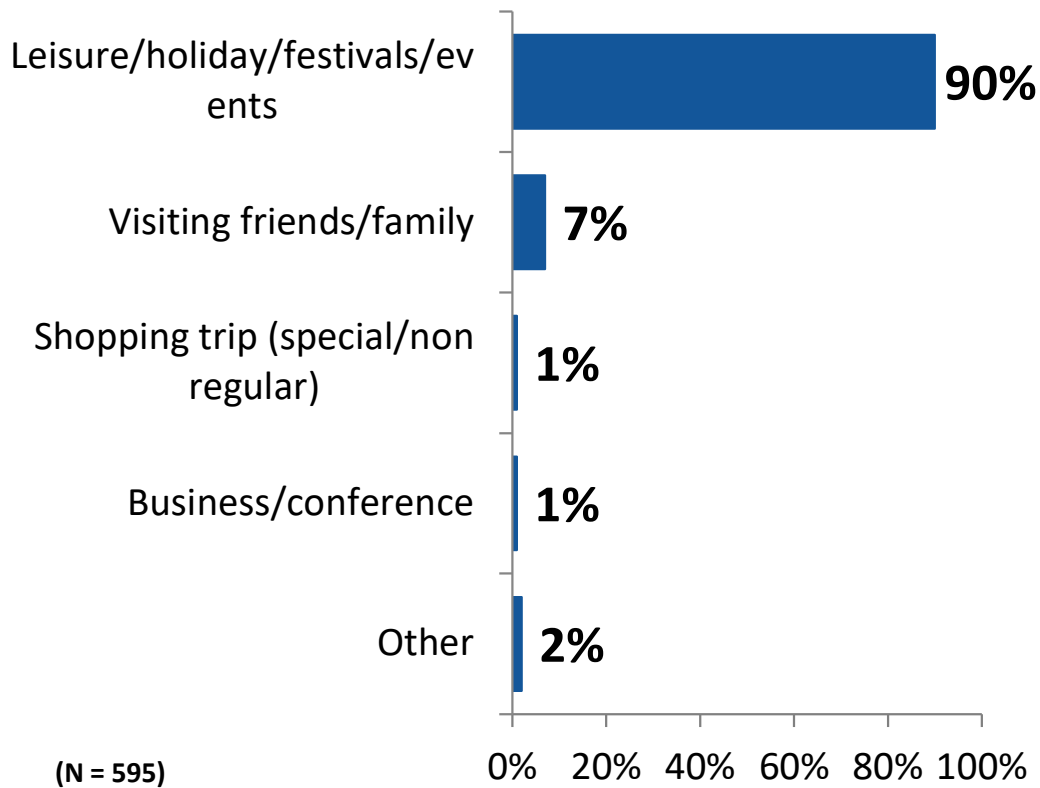
Main purpose of visit	Day visitors	Staying visitors	First time	Repeat visitors
Leisure/holiday/ festivals/events	78%	91%	93%	90%
Visiting friends/family	14%	6%	4%	7%
Shopping trip (special/non regular)	3%	0%	4%	0%
Business/ conference	0%	1%	0%	1%
Other	5%	1%	0%	2%

90% had visited The English Riviera as part of a leisure/holiday related trip with this proportion increasing to 93% for those on their first visit to the resort. 7% were visiting friends or relatives (14% of day visitors and 7% of repeat visitors). 1% in each case had visited the resort as part of a special shopping trip or for a business/conference trip and 2% for another reason (5% of day visitors).

There was little variation in the results compared with the 2021 survey findings.

Torquay and Paignton were the most popular locations for staying visits.

Where did you stay on The English Riviera?

Babbacombe, 6%

Other Torbay, 8%

Brixham, 12%

Torquay, 42%
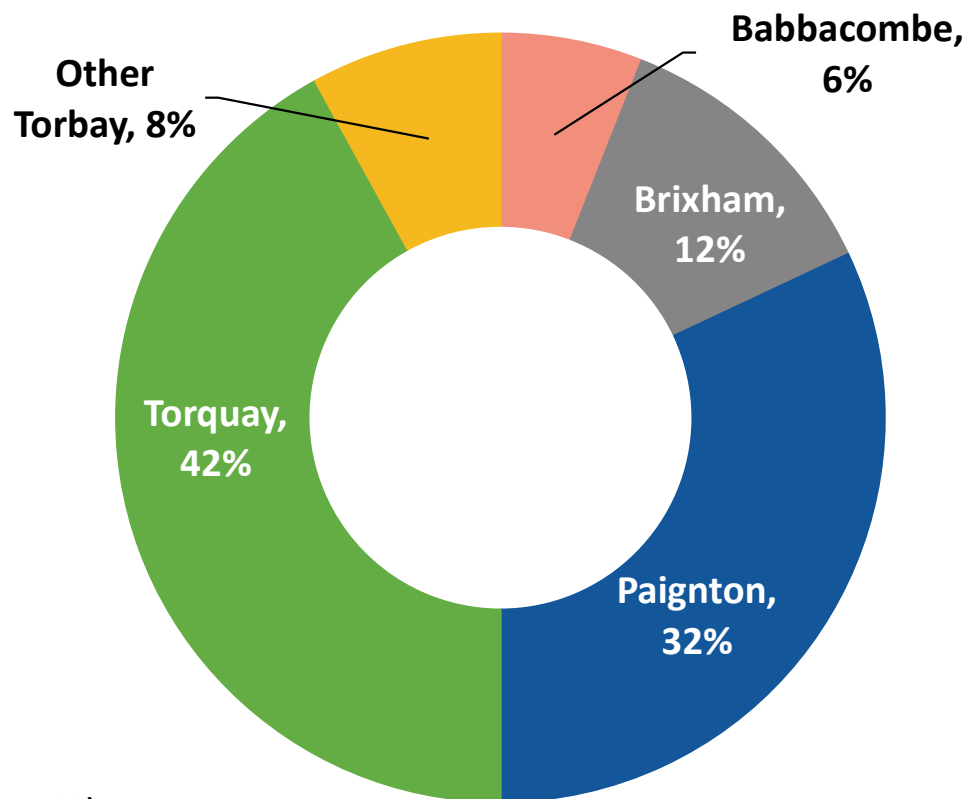
Paignton, 32%

(N = 522)

Location of staying visit	First time	Repeat visitors
Babbacombe	4%	6%
Brixham	8%	13%
Paignton	19%	32%
Torquay	50%	41%
Other Torbay	19%	8%

42% of staying visitors had stayed in accommodation in Torquay and 32% in Paignton. 12% stayed in Brixham and 6% in Babbacombe. 8% stayed in another location on The English Riviera.

Torquay was by far the most popular choice of where to stay for first time and repeat staying visitors to the resort (50% and 41% respectively).

There was little variation in the results compared with the 2021 survey findings.

Serviced accommodation was the most popular.

58% of staying visitors had used serviced accommodation in the resort including a hotel, B&B or guest house whilst 23% had used self catering accommodation. 14% had stayed in a static caravan/holiday park and 6% had camped/used their own caravan. 2% had stayed in their own second home on The English Riviera and 5% had used another type of accommodation including staying at a friends or relatives house or in a motorhome.

Both first time visitors to the resort and those on a repeat visit were more likely to use serviced accommodation (58% in each case) than all other accommodation types.

There was a 5% increase in the proportion of visitors using serviced accommodation during 2022 compared with those doing so during 2021 (53%) along with a 5% decrease in those using self catering accommodation compared with last year (28%).

What type of accommodation did you use?

(N = 530)
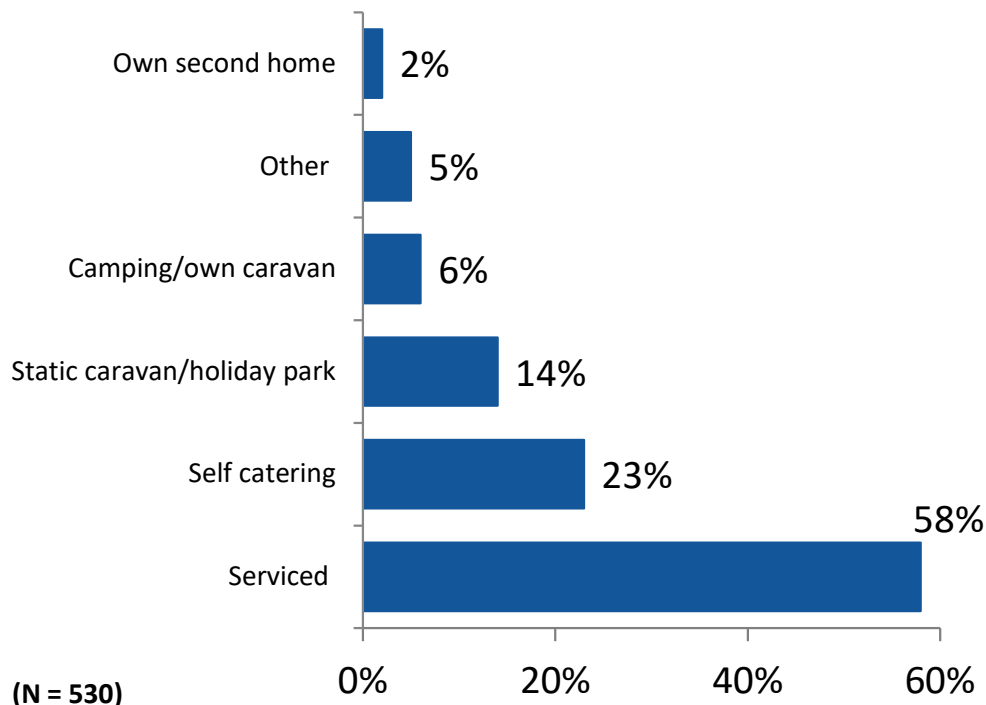
Accommodation used	First time	Repeat visitors
Serviced (Hotel/B&B/Guest House)	58%	58%
Self catering	19%	23%
Own second home	0%	2%
Camping/own caravan	8%	6%
Static caravan/holiday park	15%	14%
Other	0%	5%

32

Characteristics of visits trend data 2022 vs 2021.

During which month(s) did your visit to The English Riviera take place?	2021	2022
January	2%	4%
February	2%	5%
March	3%	7%
April	5%	10%
May	11%	14%
June	19%	22%
July	27%	19%
August	25%	22%
September	30%	26%
October	22%	21%
November	1%	5%

What was the MAIN purpose of your visit to The English Riviera?	2021	2022
Leisure/holiday/festivals/events	92%	90%
Visiting friends/family	6%	7%
Shopping trip (special/non regular)	1%	1%
Business/conference	0%	1%
Other	1%	2%

Where did you stay on The English Riviera?	2021	2022
Babbacombe	5%	6%
Brixham	14%	12%
Paignton	31%	32%
Torquay	41%	42%
Other Torbay	8%	8%

What type of accommodation did you use?	2021	2022
Serviced (Hotel/B&B/Guest House)	53%	58%
Self catering	28%	23%
Own second home	3%	2%
Camping/own caravan	6%	6%
Static caravan/holiday park	12%	14%
Other	4%	5%

The English Riviera Visitor Survey 2022

Information Sourcing & Booking Patterns

Those visiting during 2022 only (605 respondents)

50% of accommodation was booked more than 12 weeks in advance.

50% of staying visitors had booked their accommodation more than 12 weeks in advance of their visit including 24% 3-6 months in advance of their visit, 21% 7-12 months in advance of their visit and 5% more than 12 months in advance of their visit. 43% booked up to 12 weeks in advance of their visit.

There was little variation in the results according to whether respondents were on a first time or repeat visit to the resort or compared with the 2021 survey results.

How far in advance did you book your accommodation?

Category	Value
Up to 4 weeks before my visit	13%
Up to 6 weeks before my visit	10%
Up to 8 weeks before my visit	10%
Up to 12 weeks before my visit	10%
3-6 months before my visit	24%
7-12 months before my visit	21%
More than 12 months before my visit	5%
I did not book my visit in advance	5%
Don't know/can't recall	2%
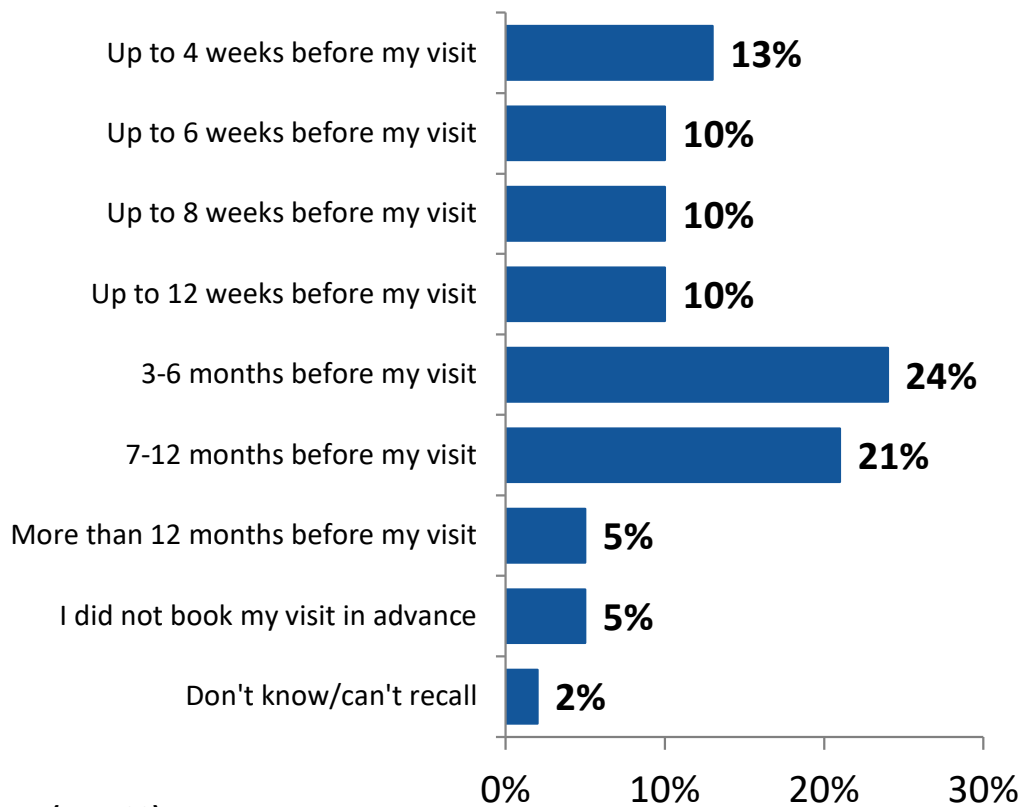
(N = 522)

How far in advance booked accommodation	First time	Repeat visitors
Up to 4 weeks before my visit	15%	13%
Up to 6 weeks before my visit	4%	10%
Up to 8 weeks before my visit	12%	10%
Up to 12 weeks before my visit	12%	10%
3-6 months before my visit	38%	23%
7-12 months before my visit	12%	22%
More than 12 months before my visit	4%	5%
I did not book my visit in advance	4%	5%
Don't know/can't recall	0%	2%

Two thirds of staying visitors booked direct with their accommodation provider.

How did you book your accommodation?

Direct with my accommodation provider — 66%
Through an online travel agent (OTA) e.g. Airbnb, Booking.com, LateRooms.com, Expedia.co.uk etc. — 17%
Other — 12%
Through an agency — 7%

(N = 535)
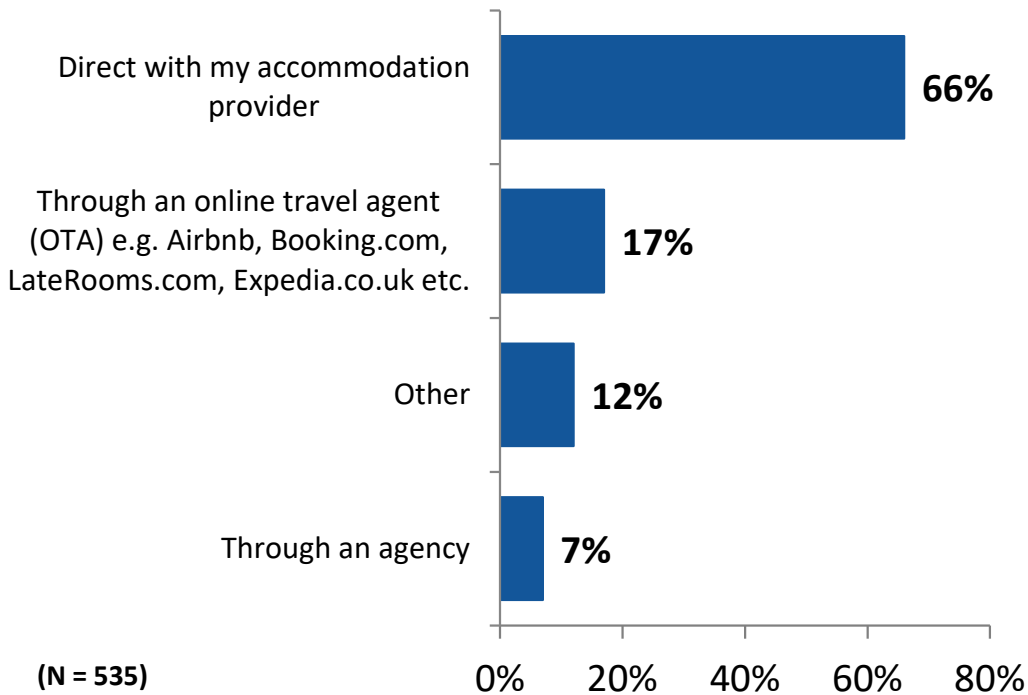
How booked accommodation	First time	Repeat visitors
Direct with my accommodation provider	46%	67%
Through an online travel agent (OTA) e.g. Airbnb, Booking.com, LateRooms.com, Expedia.co.uk etc.	31%	16%
Through an agency	15%	7%
Other	8%	13%

66% of staying visitors booked directly with their accommodation provider, 17% booked through an online travel agent (OTA) and 7% through an agency. 12% booked via another method including through family or friends and via their coach operator.

A significantly higher proportion of repeat visitors booked direct with their accommodation provider (67%) compared with 46% of those on their first visit to the resort. 31% of those experiencing The English Riviera for the first time had booked through an online travel agent compared with only 16% of repeat visitors.

2022 saw a 4% increase in the proportion of staying visitors booking direct with their accommodation provider (66%) compared with 2021 (62%) along with a decrease in those booking through an OTA (17% in 2022 compared with 22% in 2021).

66% of those using an OTA had used Booking.com.

Which online travel agency (OTA) did you use to book your accommodation?

OTA	%
Booking.com	66%
Hotels.com	11%
Airbnb	8%
Other	7%
Vrbo	4%
Expedia	3%

(N = 89)
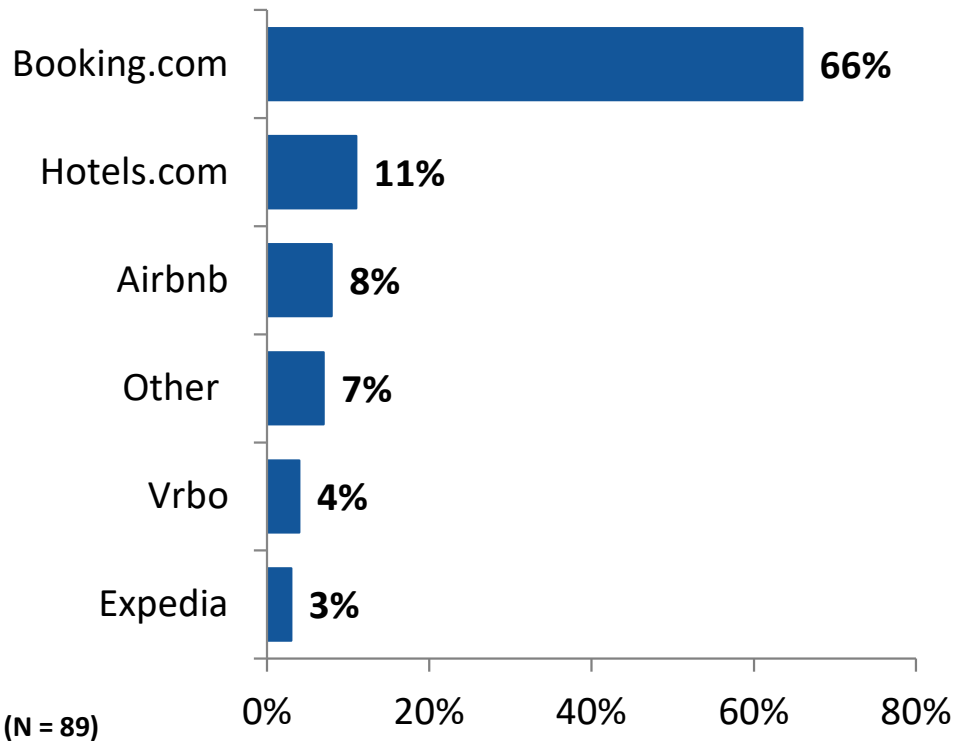
OTA used	First time	Repeat visitors
Airbnb	25%	6%
Booking.com	25%	70%
LateRooms.com	0%	0%
Expedia	0%	4%
TripAdvisor	0%	0%
Hotels.com	25%	10%
Vrbo	13%	4%
Other	13%	6%

66% of those using an OTA to book their accommodation had used Booking.com and 11% Hotels.com.

8% had used Airbnb, 4% Vrbo and 3% had used Expedia. 7% had used another OTA including Cottages.com and Hoseasons.

There was little variation in the results according to whether respondents were on a first time or repeat visit to the resort or compared with the 2021 survey findings.

53% of visitors had sourced information about The English Riviera.

53% of visitors had sourced information about The English Riviera to assist them either before or during their visit. This proportion increased to 93% of those on their first visit to the resort.

The proportion of visitors sourcing information about their visit to the resort decreased by 7% compared with those doing so during 2021 (60%).

Did you source any information about The English Riviera to assist you either before or during your visit?

No, 47%

Yes, 53%
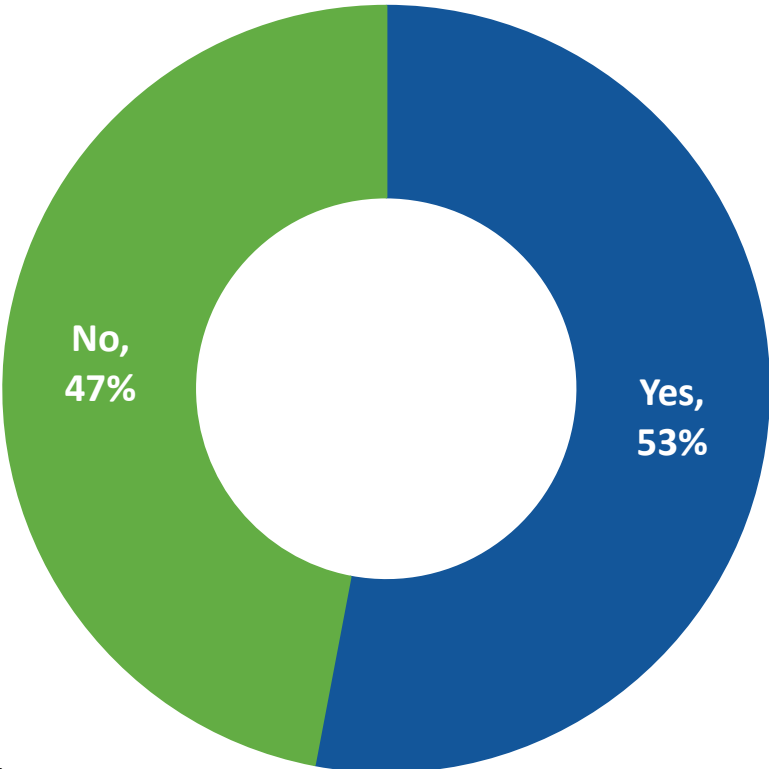
(N = 595)

Whether sourced information before or during visit	Day visitors	Staying visitors	First time	Repeat visitors
Yes	44%	54%	93%	51%
No	56%	46%	7%	49%

58% sourced their visit information up to 12 weeks in advance.

58% of visitors who had sourced information about The English Riviera to assist them either before or during their visit had done so up to 12 weeks in advance including 26% up to 4 weeks prior to their visit. 37% sourced their information more than 12 weeks before their visit.

Day visitors and those on their first visit to the resort were more likely to source their visit information up to 12 weeks in advance (76% and 72% respectively) than those on a staying visit or a repeat visit to the resort (56% in each case). 39% and 38% of staying visitors and those on a repeat visit had sourced their information more than 12 weeks in advance compared with just 19% of day visitors and 28% of those on their first visit.

2022 has seen a higher proportion of visitors sourcing their information more than 12 weeks in advance (37%) compared with those doing so during 2021 (29%).

How far in advance did you start sourcing information about visiting The English Riviera?

Category	Percentage
Up to 4 weeks before my visit	26%
Up to 6 weeks before my visit	13%
Up to 8 weeks before my visit	9%
Up to 12 weeks before my visit	10%
3-6 months before my visit	19%
7-12 months before my visit	13%
More than 12 months before my visit	5%
I did not plan my visit in advance	3%
Don't know/can't recall	4%

(N = 313)
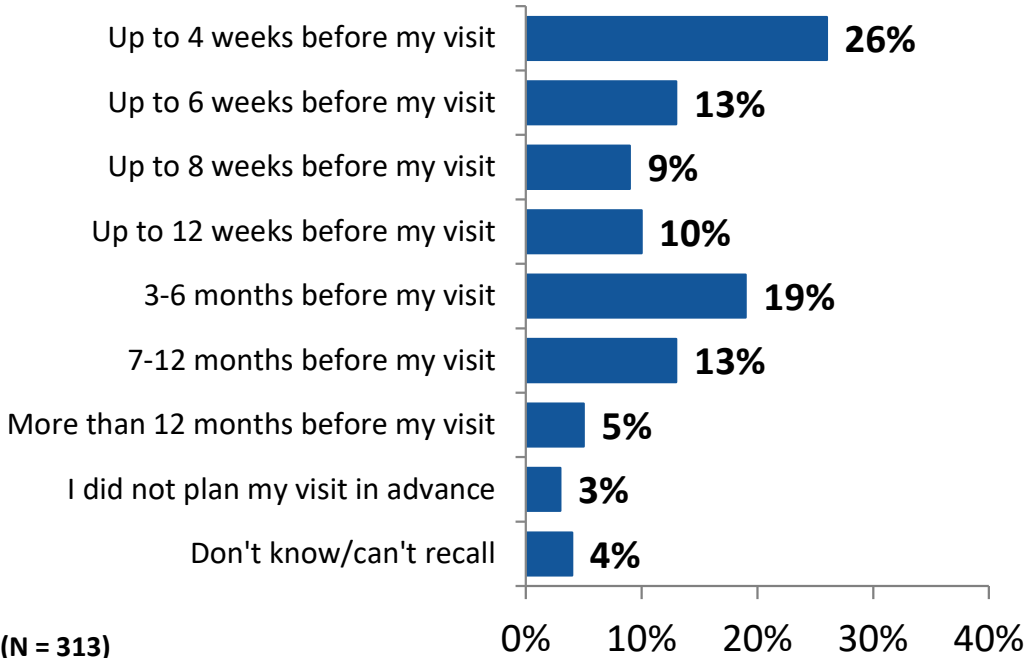
How far in advance sourced visit information	Day visitors	Staying visitors	First time	Repeat visitors
Up to 4 weeks before my visit	41%	24%	40%	25%
Up to 6 weeks before my visit	13%	13%	12%	13%
Up to 8 weeks before my visit	9%	9%	4%	9%
Up to 12 weeks before my visit	13%	10%	16%	9%
3-6 months before my visit	3%	21%	20%	19%
7-12 months before my visit	13%	13%	4%	14%
More than 12 months before my visit	3%	5%	4%	5%
I did not book my visit in advance	3%	2%	0%	3%
Don't know/can't recall	3%	4%	0%	4%

The internet was the most popular place to source information.

Where did you obtain your information about visiting The English Riviera?

Source	%
On the internet - including social media & apps	84%
Brochure/leaflet/guide	38%
Tourist Information Centre	35%
Via friends/family	16%
Other	4%
Newspaper/magazine	3%
I don't know/can't remember	2%

(N = 567)
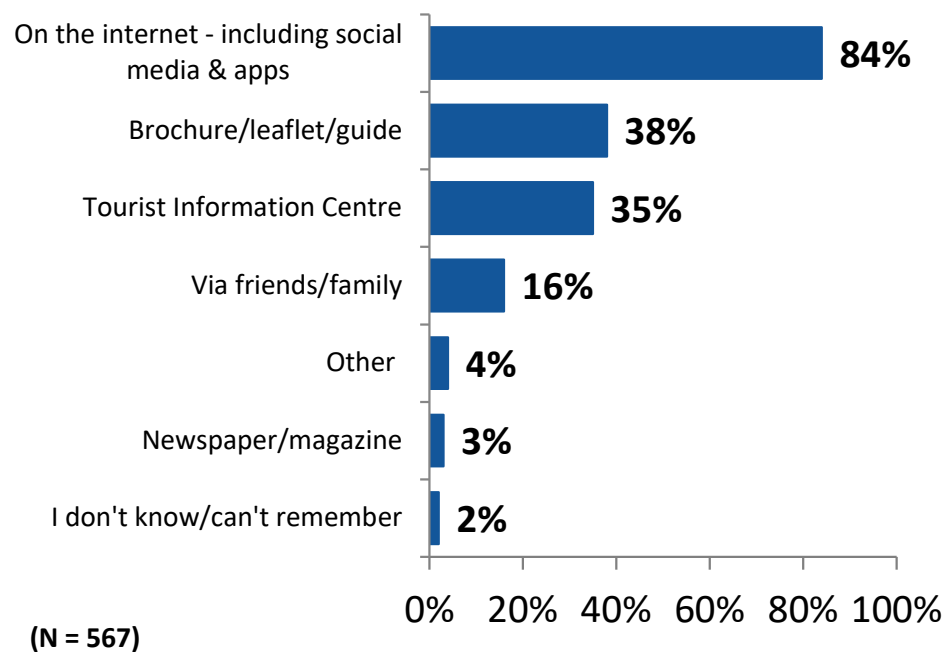
Where obtained information	Day visitors	Staying visitors	First time	Repeat visitors
Via friends/family	16%	16%	12%	17%
On the internet - including social media & apps	91%	83%	72%	85%
Newspaper/magazine	3%	2%	0%	3%
Travel Agent	0%	0%	0%	0%
Tourist Information Centre	25%	36%	44%	34%
Brochure/leaflet/guide	38%	38%	36%	38%
I don't know/can't remember	0%	2%	4%	1%
Other	0%	5%	4%	4%

84% of visitors who had sourced information about The English Riviera to assist them either before or during their visit had done so on the internet (including social media and apps).

38% had used a brochure/leaflet/guide to source their information (the majority mentioning The English Riviera Official Guide) and 35% had used a tourist information centre. 16% sourced their information from friends and family and 3% from a newspaper/magazine. 5% used another source including the majority who said they have visited before and had previous knowledge of the area. 2% said they didn't know/couldn't remember where they had sourced their information about their visit.

There was little variation in the results according to visitor type, whether respondents were first time or repeat visitors to the resort or compared with the 2021 survey results.

88% of internet users had used the www.englishriviera.co.uk website.

Did you use any of the following websites when searching for information on the internet about visiting The English Riviera?

www.englishriviera.co.uk **88%**
www.visitdevon.co.uk **49%**
Review sites e.g Trip Advisor **32%**
Accommodation provider's... **31%**
Social media **19%**
Newspaper/magazine/travel... **3%**
I don't know/can't recall **1%**
Other **3%**

0% 20% 40% 60% 80% 100%
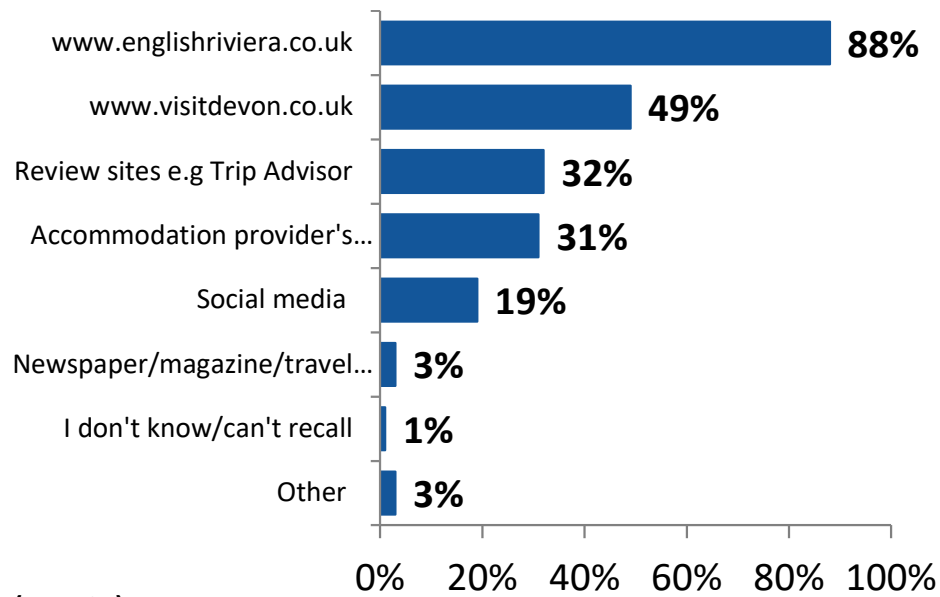
(N = 591)

Websites used	Day visitors	Staying visitors	First time	Repeat visitors
www.englishriviera.co.uk	83%	88%	83%	88%
www.visitdevon.co.uk	76%	45%	56%	48%
Accommodation provider's website	21%	32%	33%	31%
Social media e.g. Facebook/Twitter/Instagram	24%	18%	17%	19%
Review sites e.g. Trip Advisor	28%	32%	44%	31%
Newspaper/magazine/travel magazine websites e.g. Sunday Times/Lonely Planet	7%	3%	6%	3%
I don't know/can't recall	0%	1%	0%	1%
Other	3%	3%	6%	2%

88% of visitors who had sourced information about visiting The English Riviera on the internet had used the www.englishriviera.co.uk website and 49% the www.visitdevon.co.uk website. 32% used review websites such as TripAdvisor and 31% their accommodation providers' website. 19% used a social media site such as Facebook/Twitter/Instagram.

Day visitors were more likely to have used the www.visitdevon.co.uk website (76%) when searching for information on the internet about visiting the resort and first time visitors were more likely to use review sites such as TripAdvisor (44%).

There was little variation in the results compared with the 2021 survey findings.

Mobile phones were the preferred electronic device used by visitors for sourcing and booking leisure related trips/activities online.

30% of visitors preferred to use their mobile phone to source and/or book their leisure related trips/activities online. 25% preferred to use a laptop computer, 19% a tablet and 15% a desktop computer. 8% had no preference and 2% said they did not source information or book online.

There was little variation in the results according to visitor type, whether respondents were first time or repeat visitors to the resort or compared with the 2021 survey findings.

Which type of electronic device, if any, do you prefer to use to source and book your leisure related trips/ activities online?

Device	Percentage
Mobile phone	30%
Laptop computer	25%
Tablet	19%
Desktop computer	15%
I have no preference	8%
I do not source information or book online	2%

(N = 595)
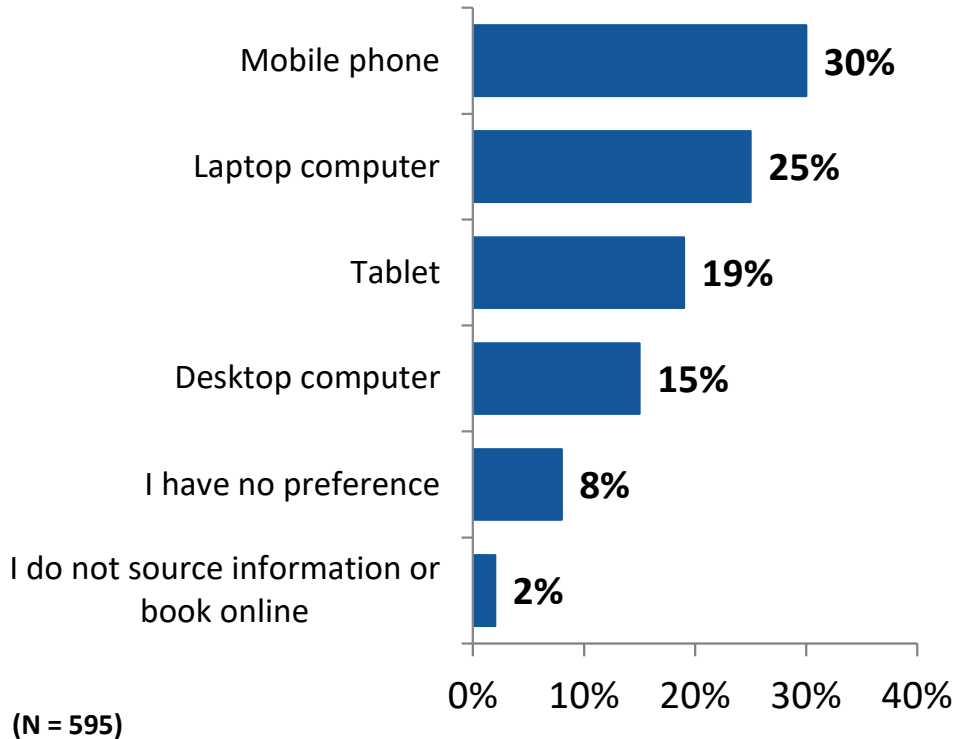
Preferred electronic device to source and book	Day visitors	Staying visitors	First time	Repeat visitors
Laptop computer	25%	25%	26%	25%
Desktop computer	12%	16%	11%	15%
Mobile phone	33%	30%	30%	30%
Tablet	26%	18%	15%	19%
I have no preference	3%	8%	15%	7%
I do not source information or book online	1%	2%	4%	2%

42

62% of visitors used Facebook.

62% of visitors used Facebook, 36% YouTube, 22% Instagram and 15% Twitter, 3% used Tik Tok, 2% Snapchat and 1% another social media channel including WhatsApp and LinkedIn. Around a quarter of visitors (26%) said they did not use social media channels.

There was little variation in the results according to visitor type or whether respondents were first time or repeat visitors to the resort.

The 2022 survey saw 36% of visitors using YouTube compared to just 5% saying the same during the 2021 survey.

Which, if any, of the following social media channels do you use?

Channel	%
Facebook	62%
YouTube	36%
I do not use any social media channels	26%
Instagram	22%
Twitter	15%
Tik Tok	3%
Snapchat	2%
Other	1%
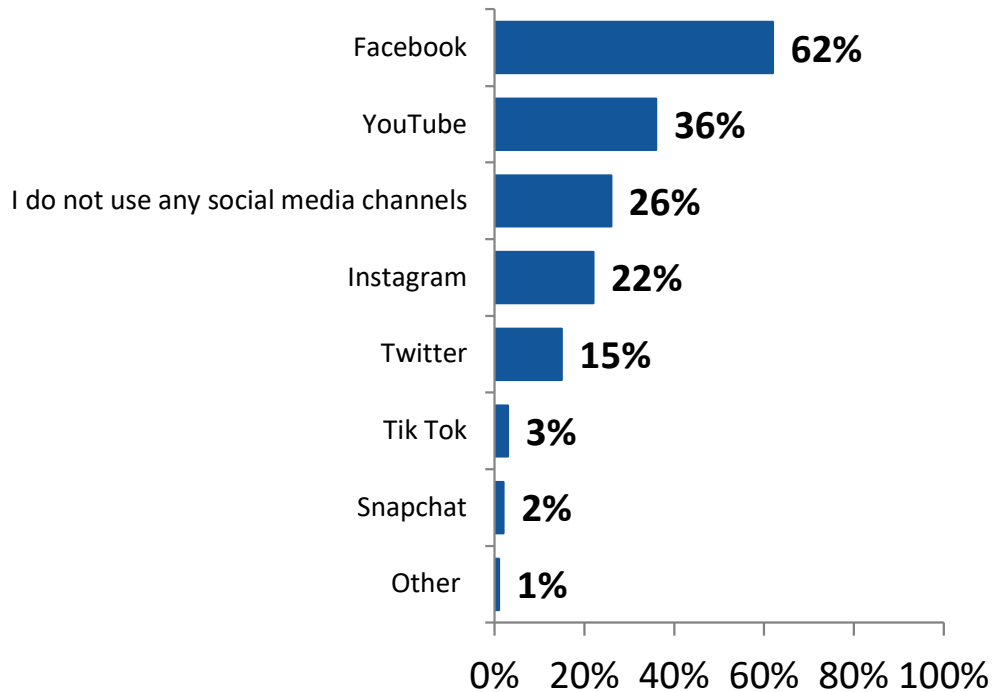
(N = 993)

Social media channels used	Day visitors	Staying visitors	First time	Repeat visitors
Facebook	68%	61%	70%	62%
Instagram	22%	21%	30%	21%
Twitter	14%	15%	11%	15%
Snapchat	3%	2%	0%	2%
Tik Tok	7%	3%	0%	3%
You Tube	41%	36%	41%	36%
I do not use any social media channels	25%	26%	19%	27%
Other	3%	1%	0%	1%

Social media channels were considered most influential on where visitors decided to eat/drink out and which events they decided to attend.

Visitors who used social media channels were asked how much of an influence the social media channels they used had been on their decisions to do a number of things. The largest proportion of visitors for each area said the social media they had used had been of no influence (31-56%).

67% of visitors said the social media channels they used had some level of influence on them when deciding which events to attend, 64% when deciding where to eat & drink, 55% when choosing which destinations to visit and 41% when deciding which types of accommodation to use.

The results by visitors type and first time/staying visitors are shown overleaf. There was little variation in the results compared with the 2021 survey findings.

How much of an influence do the social media channels which you use have on your decisions for the following things… ?

	No influence	Minor influence	Medium influence	Major influence	Don't know/not applicable
Which destinations you choose to visit	45%	26%	22%	7%	
Which types of accommodation you decide to use	56%	15%	15%	11%	2%
Where you decide to eat/drink out	35%	23%	28%	13%	1%
Which events you decide to attend	31%	25%	29%	13%	2%

■ No influence ■ Minor influence ■ Medium influence ■ Major influence ■ Don't know/not applicable

(N = 440)

44
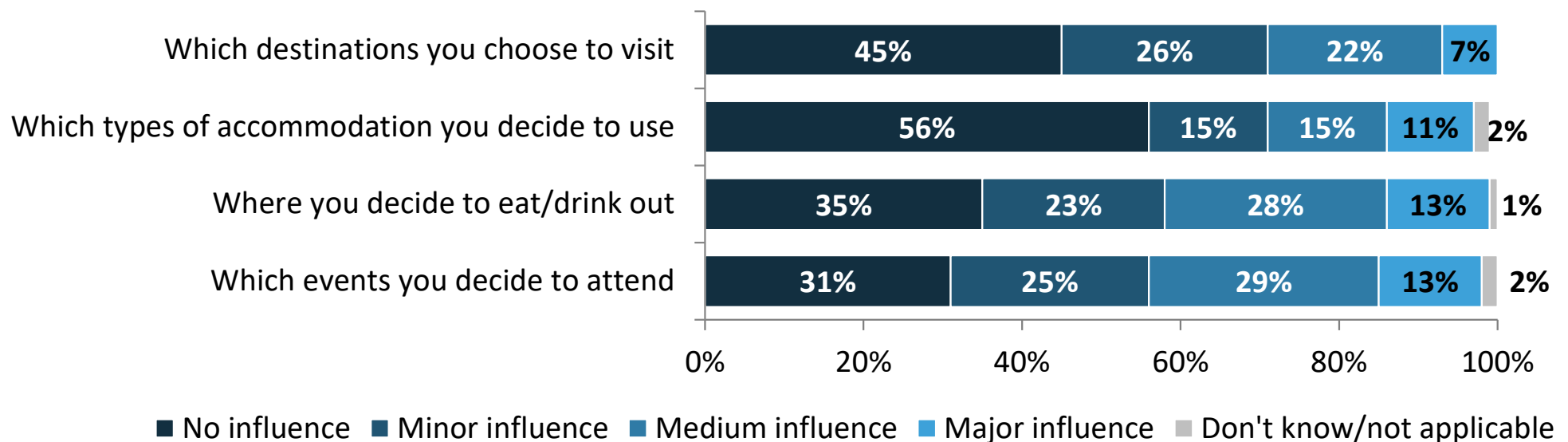
Social media channels were slightly more of an influence on day rather than staying visitors and first time rather than repeat visitors.

Social media channels level of influence	Day visitors					Staying visitors				
	No influence	Minor influence	Medium influence	Major influence	DK/NA	No influence	Minor influence	Medium influence	Major influence	DK/NA
Which destinations you choose to visit	38%	27%	23%	13%	0%	46%	26%	22%	6%	1%
Which types of accommodation you decide to use	48%	21%	9%	14%	7%	58%	15%	16%	11%	1%
Where you decide to eat/drink out	36%	25%	25%	13%	2%	35%	23%	28%	13%	1%
Which events you decide to attend	16%	29%	32%	20%	4%	33%	24%	29%	12%	2%

Social media channels level of influence	First time					Repeat visitors				
	No influence	Minor influence	Medium influence	Major influence	DK/NA	No influence	Minor influence	Medium influence	Major influence	DK/NA
Which destinations you choose to visit	32%	32%	27%	9%	0%	46%	25%	22%	7%	0%
Which types of accommodation you decide to use	50%	14%	23%	14%	0%	57%	16%	15%	11%	2%
Where you decide to eat/drink out	27%	18%	41%	14%	0%	36%	24%	27%	13%	1%
Which events you decide to attend	32%	14%	36%	9%	9%	31%	25%	29%	13%	2%

Information sourcing & booking patterns trend data 2022 vs 2021.

How far in advance did you book your accommodation?	2021	2022
Up to 4 weeks before my visit	11%	13%
Up to 6 weeks before my visit	7%	10%
Up to 8 weeks before my visit	11%	10%
Up to 12 weeks before my visit	9%	10%
3-6 months before my visit	23%	24%
7-12 months before my visit	23%	21%
More than 12 months before my visit	9%	5%
I did not book my visit in advance	5%	5%
Don't know/can't recall	2%	2%

How did you book your accommodation?	2021	2022
Direct with my accommodation provider	62%	66%
Through an online travel agent (OTA) e.g. Airbnb, Booking.com, LateRooms.com, Expedia.co.uk etc.	22%	17%
Through an agency	8%	7%
Other	11%	12%

Which online travel agency (OTA) did you use to book your accommodation?	2021	2022
Airbnb	7%	8%
Booking.com	67%	66%
LateRooms.com	0%	0%
Expedia	1%	3%
TripAdvisor	2%	0%
Hotels.com	4%	11%
Vrbo	3%	4%
Other	16%	7%

Did you source any information about the English Riviera to assist you either before or during your visit?	2021	2022
Yes	60%	53%
No	40%	47%

Information sourcing & booking patterns trend data 2022 vs 2021.

How far in advance did you start sourcing information about visiting The English Riviera?	2021	2022
Up to 4 weeks before my visit	31%	26%
Up to 6 weeks before my visit	9%	13%
Up to 8 weeks before my visit	15%	9%
Up to 12 weeks before my visit	13%	10%
3-6 months before my visit	16%	19%
7-12 months before my visit	8%	13%
More than 12 months before my visit	5%	5%
I did not plan my visit in advance	2%	3%
Don't know/can't recall	2%	4%

Where did you obtain your information about visiting The English Riviera?	2021	2022
Via friends/family	14%	16%
On the internet - including social media & apps	86%	84%
Newspaper/magazine	4%	3%
Travel Agent	1%	0%
Tourist Information Centre	33%	35%
Brochure/leaflet/guide	33%	38%
I don't know/can't remember	0%	2%
Other	5%	4%

Did you use any of the following websites when searching for information on the internet about visiting The English Riviera?	2021	2022
www.englishriviera.co.uk	86%	88%
www.visitdevon.co.uk	50%	49%
Accommodation provider's website	29%	31%
Social media e.g. Facebook/Twitter/Instagram	19%	19%
Review sites e.g. Trip Advisor	36%	32%
Newspaper/magazine/travel magazine websites e.g. Sunday Times/Lonely Planet	4%	3%
I don't know/can't recall	4%	1%
Other	2%	3%

Which type of electronic device, if any, do you prefer to use to source and book your leisure related trips/ activities online?	2021	2022
Laptop computer	23%	25%
Desktop computer	13%	15%
Mobile phone	30%	30%
Tablet	24%	19%
I have no preference	7%	8%
I do not source information or book online	3%	2%

Information sourcing & booking patterns trend data 2022 vs 2021.

Which, if any, of the following social media channels do you use?	2021	2022
Facebook	64%	62%
Instagram	24%	22%
Twitter	20%	15%
Snapchat	4%	2%
Tik Tok	4%	3%
You Tube	5%	36%
I do not use any social media channels	24%	26%
Other	2%	1%

How much of an influence do the social media channels which you use have on your decisions for the following things… ? Which destinations you choose to visit	2021	2022
No influence	46%	45%
Minor influence	27%	26%
Medium influence	19%	22%
Major influence	6%	7%
Don't know/not applicable	2%	0%
Which types of accommodation you decide to use	2021	2022
No influence	50%	56%
Minor influence	16%	15%
Medium influence	19%	15%
Major influence	13%	11%
Don't know/not applicable	2%	2%
Where you decide to eat/drink out	2021	2022
No influence	34%	35%
Minor influence	23%	23%
Medium influence	27%	28%
Major influence	15%	13%
Don't know/not applicable	1%	1%
Which events you decide to attend	2021	2022
No influence	37%	31%
Minor influence	23%	25%
Medium influence	26%	29%
Major influence	11%	13%
Don't know/not applicable	4%	2%

The English Riviera Visitor Survey 2022

Activity Taking

Those visiting during 2022 only (605 respondents)

Introduction.

Visitors were shown a list of activities/experiences and asked to select those from the list which they took part in when they last visited The English Riviera and if any of them were the main reason for their visit to the resort. If they didn't take part in any of the activities/experiences listed, they were asked to select if they were things which appealed to them.

As is shown overleaf, by far the most popular activities were eating & drinking (81% took part including 13% for whom it was their main reason for visiting), shopping (65% took part including 6% for whom it was their main reason for visiting), visiting local attractions/places of interest (63% took part including 27% for whom it was their main reason for visiting) and visiting the beach/sea (63% took part including 21% for whom it was their main reason for visiting).

50% had taken part in walking/nature-based activities (including 15% for whom it was their main reason for visiting), 40% in history/heritage-based activities (11% for whom it was their main reason for visiting) and 33% had visited bars/nightclubs (3% for whom it was their main reason for visiting). 27% had attended local events (8% for whom it was their main reason for visiting) and 20% had taken part in water-based activities (5% for whom it was their main reason for visiting). 17% had attended live theatre/music/comedy events (4% for whom it was their main reason for visiting) and 7% had taken part in outdoor sports/pursuits (2% for whom it was their main reason for visiting).

In terms of activities/experiences which visitors hadn't taken part in during their visit to The English Riviera, but which appealed to them, live theatre/music/comedy events was most appealing (56%), followed by outdoor sports/pursuits (48%), attending local events (45%) and/or taking part in water-based activities (43%).

History/heritage-based activities appealed to 33% of visitors who hadn't taken part in this activity whilst visiting The English Riviera along with 29% who said the same about visiting bars/nightclubs and 26% for walking/nature-based activities. 15% who hadn't been shopping during their visit to the resort said it was appealing to them as an activity as did 14% about visiting the beach/sea, 10% for visiting local attractions/places of interest and 4% about eating & drinking.

The 2022 survey saw an increase in the proportion of visitors attending live theatre/music/comedy events (17%) compared with those doing so during 2021 (12%), along with an increase in those attending local events (27%, compared with 23% during 2021). There was a decrease in those taking part in history/heritage-based activities during 2022 (40%, compared with 44% doing so during 2021).

Visiting local attractions/places of interest and visiting the beach/sea was the main reason for visit for 27% and 21% of visitors respectively.

Please select from the list below which activities/experiences you took part in when you LAST visited The English Riviera and if any of these were the main reason for your visit. If you didn't take part in any of the activities /experiences listed please tell us if they are things which appeal to you.

ALL 2022 VISITORS

Activity	Took part in	Main reason for visit	Did not take part in but appeals to me
Visit the beach/sea	63%	21%	14%
Visit local attractions/places of interest	63%	27%	10%
Walking/nature based activities	50%	15%	26%
History/heritage based activities	40%	11%	33%
Shopping	65%	6%	15%
Eating & drinking	81%	13%	4%
Live theatre/music/comedy events	17%	4%	56%
Attending local events	27%	8%	45%
Water based activities (boat trips/sailing/surfing/SUP/wild swimming etc.)	20%	5%	43%
Visiting bars/nightclubs	33%	3%	29%
Outdoor sports/pursuits (Cycling/golf etc.)	7%	2%	48%

■ Took part in ■ Main reason for visit ■ Did not take part in but appeals to me

Shopping was the main reason for visiting for around double the proportion of day visitors than staying visitors.

Please select from the list below which activities/experiences you took part in when you LAST visited The English Riviera and if any of these were the main reason for your visit. If you didn't take part in any of the activities /experiences listed please tell us if they are things which appeal to you.

DAY VISITORS

Activity	Took part in	Main reason for visit	Did not take part in but appeals to me
Visit the beach/sea	51%	29%	19%
Visit local attractions/places of interest	48%	25%	18%
Walking/nature based activities	36%	19%	36%
History/heritage based activities	16%	11%	53%
Shopping	44%	11%	26%
Eating & drinking	66%	18%	12%
Live theatre/music/comedy events	16%	7%	56%
Attending local events	23%	10%	49%
Water based activities (boat trips/sailing/surfing/SUP/wild swimming etc.)	16%	8%	49%
Visiting bars/nightclubs	15%	4%	47%
Outdoor sports/pursuits (Cycling/golf etc.)	4%	4%	59%

Legend: ■ Took part in ■ Main reason for visit ■ Did not take part in but appeals to me

A higher proportion of staying visitors took part in each of the activities than day visitors.

Please select from the list below which activities/experiences you took part in when you LAST visited The English Riviera and if any of these were the main reason for your visit. If you didn't take part in any of the activities /experiences listed please tell us if they are things which appeal to you.

STAYING VISITORS

Activity	Took part in	Main reason for visit	Did not take part in but appeals to me
Visit the beach/sea	65%	21%	14%
Visit local attractions/places of interest	63%	28%	9%
Walking/nature based activities	52%	15%	25%
History/heritage based activities	45%	11%	31%
Shopping	70%	6%	14%
Eating & drinking	84%	12%	3%
Live theatre/music/comedy events	17%	3%	57%
Attending local events	28%	8%	45%
Water based activities (boat trips/sailing/surfing/SUP/wild swimming etc.)	20%	5%	43%
Visiting bars/nightclubs	36%	2%	28%
Outdoor sports/pursuits (Cycling/golf etc.)	7%	2%	48%

■ Took part in   ■ Main reason for visit   ■ Did not take part in but appeals to me

53

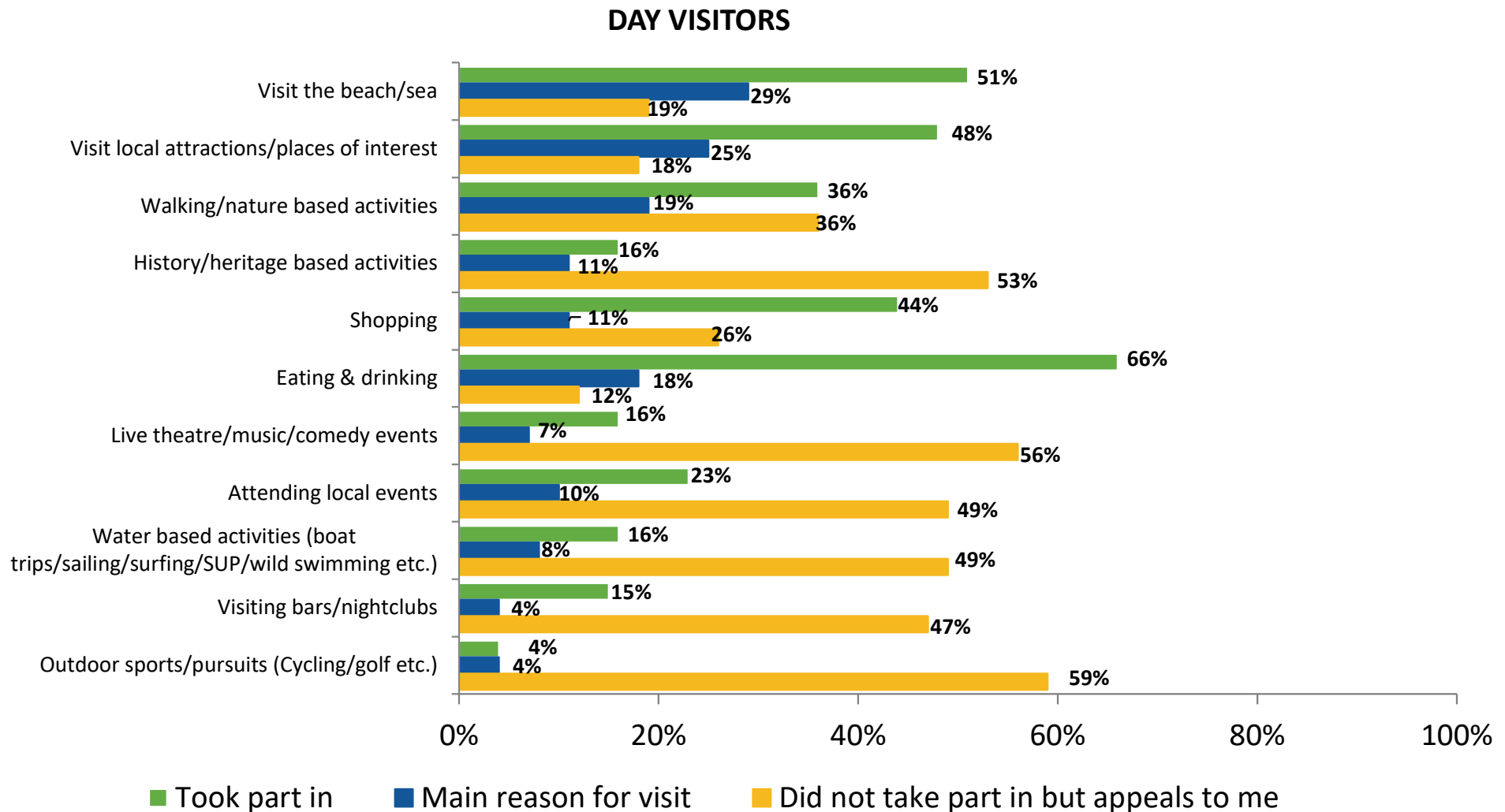# Activity taking trend data 2022 vs 2021.

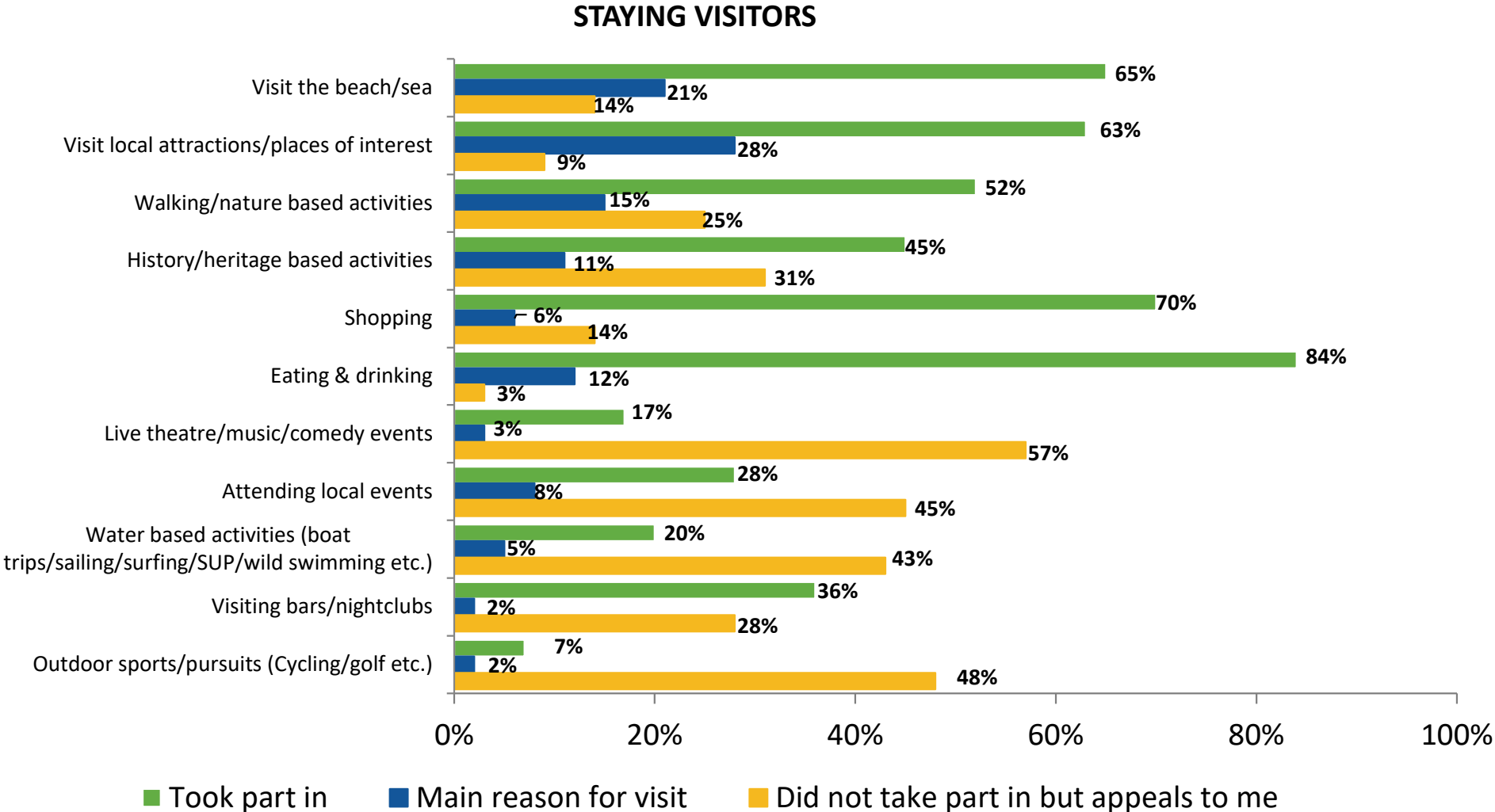| Please select from the list below which activities/experiences you took part in when you LAST visited The English Riviera and if any of these were the main reason for your visit. If you didn't take part in any of the activities /experiences listed please tell us if they are things which appeal to you. Visit the beach/sea	2021	2022
Took part in	61%	63%
Main reason for visit	23%	21%
Did not take part in but appeals to me	16%	14%
Visit local attractions/places of interest	**2021**	**2022**
Took part in	63%	63%
Main reason for visit	27%	27%
Did not take part in but appeals to me	10%	10%
Walking/nature based activities	**2021**	**2022**
Took part in	51%	50%
Main reason for visit	16%	15%
Did not take part in but appeals to me	25%	26%
History/heritage based activities	**2021**	**2022**
Took part in	44%	40%
Main reason for visit	11%	11%
Did not take part in but appeals to me	32%	33%
Shopping	**2021**	**2022**
Took part in	67%	65%
Main reason for visit	7%	6%
Did not take part in but appeals to me	15%	15%

Eating & drinking	2021	2022
Took part in	82%	81%
Main reason for visit	13%	13%
Did not take part in but appeals to me	5%	4%
Live theatre/music/comedy events	**2021**	**2022**
Took part in	12%	17%
Main reason for visit	5%	4%
Did not take part in but appeals to me	60%	56%
Attending local events	**2021**	**2022**
Took part in	23%	27%
Main reason for visit	5%	8%
Did not take part in but appeals to me	48%	45%
Water based activities (boat trips/sailing/surfing/SUP/wild swimming etc.)	**2021**	**2022**
Took part in	21%	20%
Main reason for visit	5%	5%
Did not take part in but appeals to me	46%	43%
Visiting bars/nightclubs	**2021**	**2022**
Took part in	35%	33%
Main reason for visit	5%	3%
Did not take part in but appeals to me	29%	29%
Outdoor sports/pursuits (Cycling/golf etc.)	**2021**	**2022**
Took part in	7%	7%
Main reason for visit	1%	2%
Did not take part in but appeals to me	49%	48%

The English Riviera Visitor Survey 2022

Blue Flag Scheme for Beaches

Those visiting during 2022 only (605 respondents)

94% of visitors were aware of the Blue Flag scheme for beaches.

For the first time during the 2022 survey, visitors were asked about their awareness of the Blue Flag scheme for beaches.

94% of visitors said they were aware of the scheme with awareness highest amongst those staying overnight in the resort and amongst repeat visitors.

Are you aware of the Blue Flag scheme for beaches? (unprompted)

No, 6%

Yes, 94%
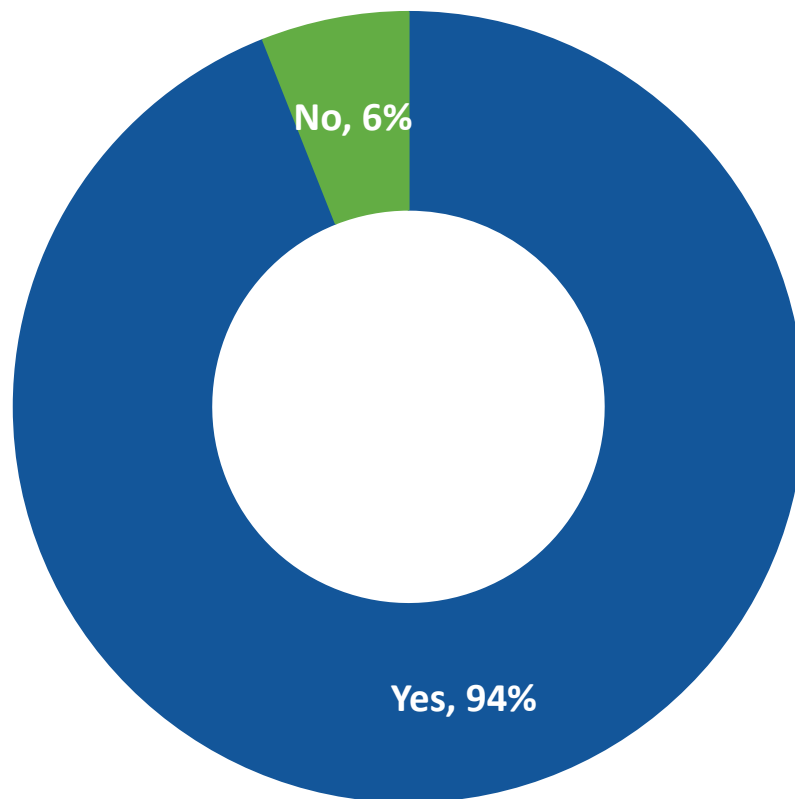
(N = 595)

Are you aware of the Blue Flag scheme for beaches?	Day visitors	Staying visitors	First time	Repeat visitors
Yes	90%	95%	89%	95%
No	10%	5%	11%	5%

56

35% of visitors had been onto a beach with a Blue Flag during their visit to the English Riviera.

33% did not know/were unsure if they had done so.

35% of visitors said they had been onto a beach with a Blue Flag during their visit to The English Riviera. A further 32% did not know/were unsure if they had done so suggesting that perhaps better promotion of these beaches is needed?

Staying visitors were more likely to have been onto a Blue Flag beach in the resort than day visitors as were repeat visitors rather than those visiting the resort for the first time.

Did you go onto a beach with a Blue Flag during your last visit to the English Riviera?

- Yes, 35%
- No, 33%
- Don't know/unsure 32%
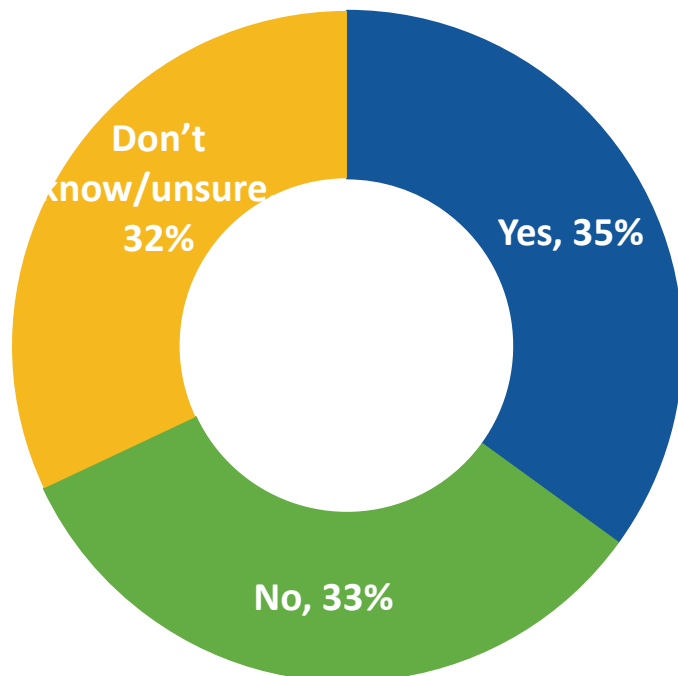
(N = 595

Did you go onto a beach with a Blue Flag during your last visit to the English Riviera?	Day visitors	Staying visitors	First time	Repeat visitors
Yes	25%	36%	33%	35%
No	44%	31%	33%	33%
Don't know/unsure	32%	33%	33%	32%

19% of visitors said having a Blue Flag beach award had influenced their decision to visit the English Riviera.

19% of visitors said having a Blue Flag beach award had influenced their decision to visit the English Riviera. There was little variation in the results by visitor type but almost double the proportion of day visitors had been influenced to visit by the presence of a Blue Flag beach in the resort (33%) than those on a repeat visit (18%).

Did having a Blue Flag beach award influence your decision on choosing to visit the English Riviera?

Yes, 19%

No, 81%

(N = 595
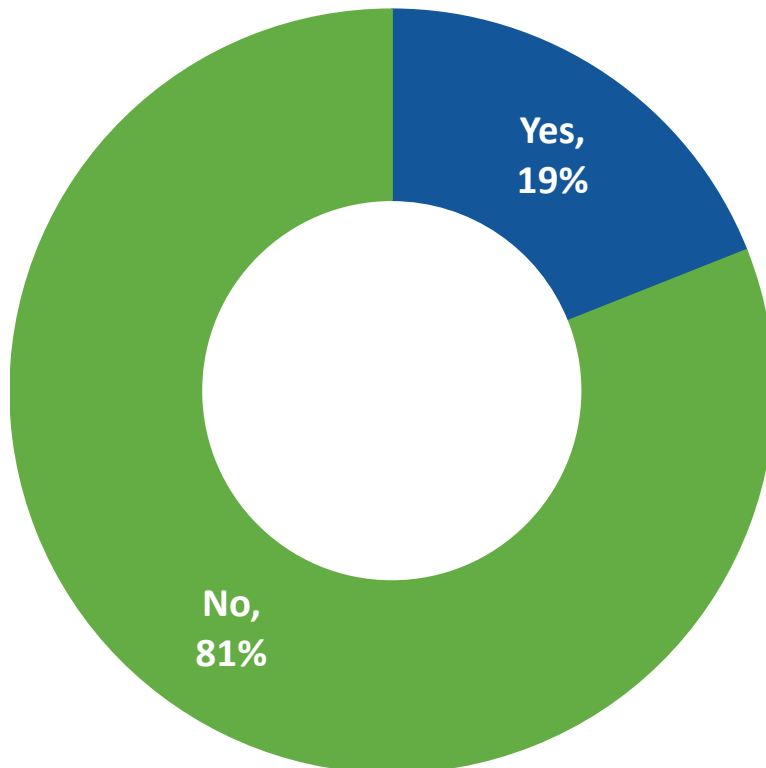
Did having a Blue Flag beach award influence your decision on choosing to visit the English Riviera?	Day visitors	Staying visitors	First time	Repeat visitors
Yes	19%	19%	33%	18%
No	81%	81%	67%	82%

The English Riviera Visitor Survey 2022

Visitors' Opinions of The English Riviera

Those visiting during 2022 only (605 respondents)

Introduction.

The 2022 English Riviera Visitor Survey obtained visitors' satisfaction levels with a wide range of factors or indicators which together comprise the 'visitor experience'. Each factor, or indicator, was rated on a range of '1' to '5' scale 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 a satisfaction 'score' (out of a maximum of five) to be calculated.

The areas explored in terms of satisfaction were:

- Accommodation
- Shopping
- Places to eat & drink
- Places to visit/attractions
- Ease of finding way around
- Public transport
- Upkeep of parks and open spaces
- Cleanliness of streets
- Quality of the beaches
- Car parks
- Nightlife/evening entertainment
- General atmosphere
- Feeling of welcome
- Overall enjoyment of visit

Visitor satisfaction categories and scores.

The full list of visitor satisfaction categories as they were explored in the survey is displayed in the table along with the score achieved for each.

Satisfaction indicator score – all visitors			
Accommodation - quality of service	4.52	Public transport - quality of service	4.16
Accommodation - value for money	4.22	Public transport - value for money	4.06
Shopping – range	3.51	Upkeep of the parks & open spaces	4.34
Shopping - quality of service	3.88	Cleanliness of the streets	3.96
Shopping - value for money	3.60	Quality of the beaches	4.39
Places to eat & drink – range	4.16	Parking - ease of parking	3.32
Places to eat & drink - quality of service	4.09	Parking - quality of service	3.40
Places to eat & drink - value for money	3.78	Parking - value for money	3.03
Places to visit/attractions – range	4.33	Nightlife/evening entertainment – range	3.84
Places to visit/attractions - quality of service	4.14	Nightlife/evening entertainment - quality of service	3.88
Places to visit/attractions - value for money	3.82	Nightlife/evening entertainment - value for money	3.66
Road signs	4.11	Overall impression of the English Riviera in terms of general atmosphere	4.42
Pedestrian signs	3.97	Overall impression of the English Riviera in terms of feeling of welcome	4.36
Display maps & information boards	3.89	Overall enjoyment of your visit	4.60

With the exception of parking and all aspects of value for money, satisfaction levels overall were high.
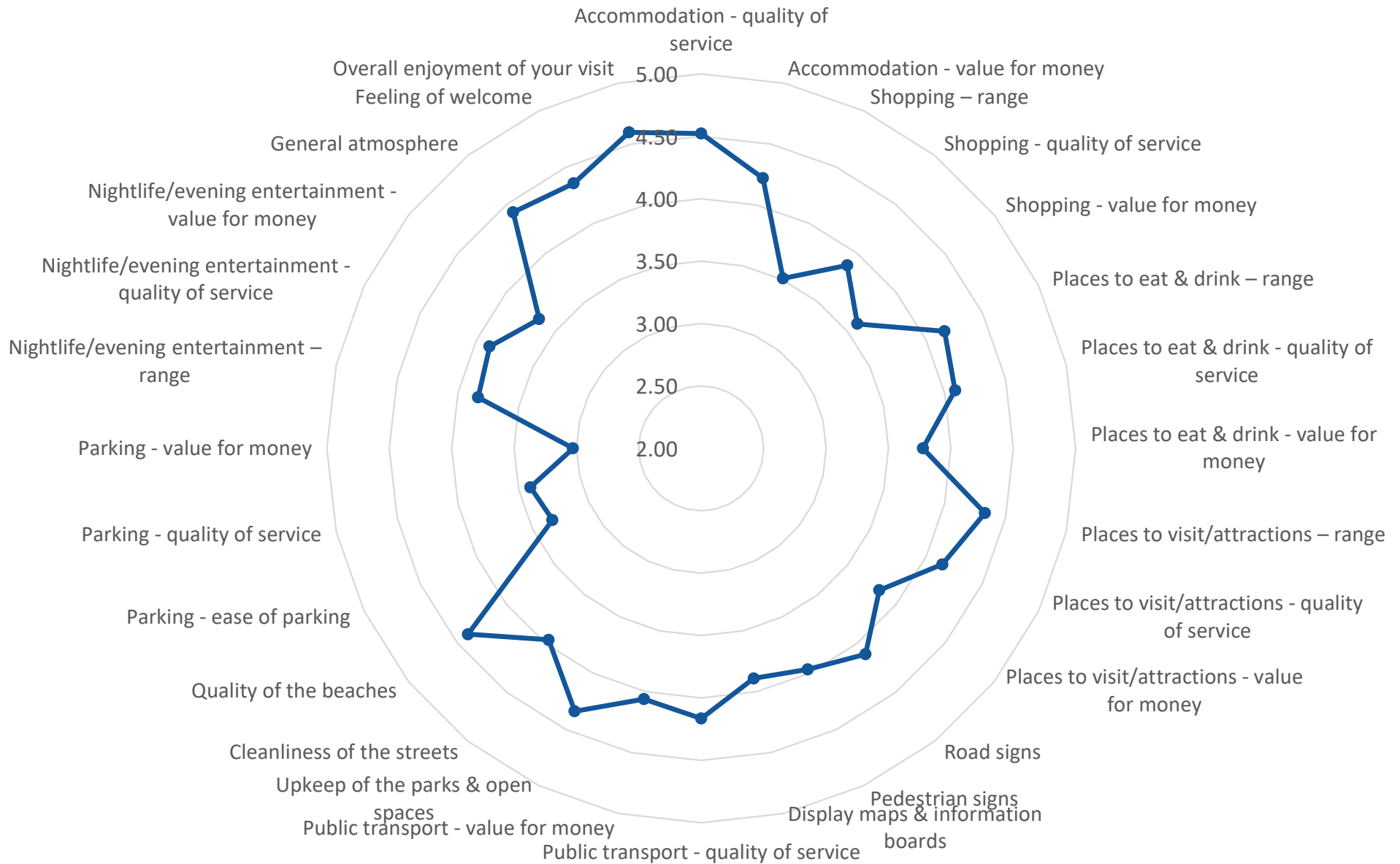
Visitor satisfaction categories and scores – day vs. staying visitors.

Satisfaction indicator score – by segment	Day visitors	Staying visitors	Satisfaction indicator score – by segment	Day Visitors	Staying visitors
Accommodation - quality of service	n/a	4.52	Public transport - quality of service	3.65	4.22
Accommodation - value for money	n/a	4.22	Public transport - value for money	3.74	4.10
Shopping – range	3.05	3.57	Upkeep of the parks & open spaces	4.13	4.37
Shopping - quality of service	3.52	3.92	Cleanliness of the streets	3.68	4.00
Shopping - value for money	3.34	3.64	Quality of the beaches	4.09	4.43
Places to eat & drink – range	3.76	4.22	Parking - ease of parking	3.03	3.37
Places to eat & drink - quality of service	3.70	4.14	Parking - quality of service	3.26	3.43
Places to eat & drink - value for money	3.51	3.81	Parking - value for money	2.90	3.05
Places to visit/attractions – range	4.03	4.37	Nightlife/evening entertainment – range	3.52	3.86
Places to visit/attractions - quality of service	3.84	4.19	Nightlife/evening entertainment - quality of service	3.57	3.91
Places to visit/attractions - value for money	3.61	3.85	Nightlife/evening entertainment - value for money	3.55	3.67
Road signs	3.76	4.16	Overall impression of the English Riviera in terms of general atmosphere	3.90	4.49
Pedestrian signs	3.67	4.01	Overall impression of the English Riviera in terms of feeling of welcome	3.90	4.42
Display maps & information boards	3.61	3.93	Overall enjoyment of your visit	4.16	4.66

Staying visitors had higher satisfaction levels than day visitors.

Radar chart comparing Day visitors and Staying visitors satisfaction levels.

- Shopping – range: 4.16
- Shopping - quality of service: 3.52
- Shopping - value for money: 3.34
- Places to eat & drink – range: 3.76
- Places to eat & drink - quality of service: 3.70
- Places to eat & drink - value for money: 3.51
- Places to visit/attractions – range: 4.03
- Places to visit/attractions - quality of service: 3.84
- Places to visit/attractions - value for money: 3.61
- Road signs: 3.76
- Pedestrian signs: 3.67
- Display maps & information boards: 3.61
- Public transport - quality of service: 3.65
- Public transport - value for money: 3.74
- Upkeep of the parks & open spaces: 4.13
- Cleanliness of the streets: 3.68
- Quality of the beaches: 4.09
- Parking - ease of parking: 3.03
- Parking - quality of service: 3.26
- Parking - value for money: 2.90
- Nightlife/evening entertainment – range: 3.52
- Nightlife/evening entertainment - quality of service: 3.57
- Nightlife/evening entertainment - value for money: 3.55
- General atmosphere: 3.90
- Feeling of welcome: 3.90
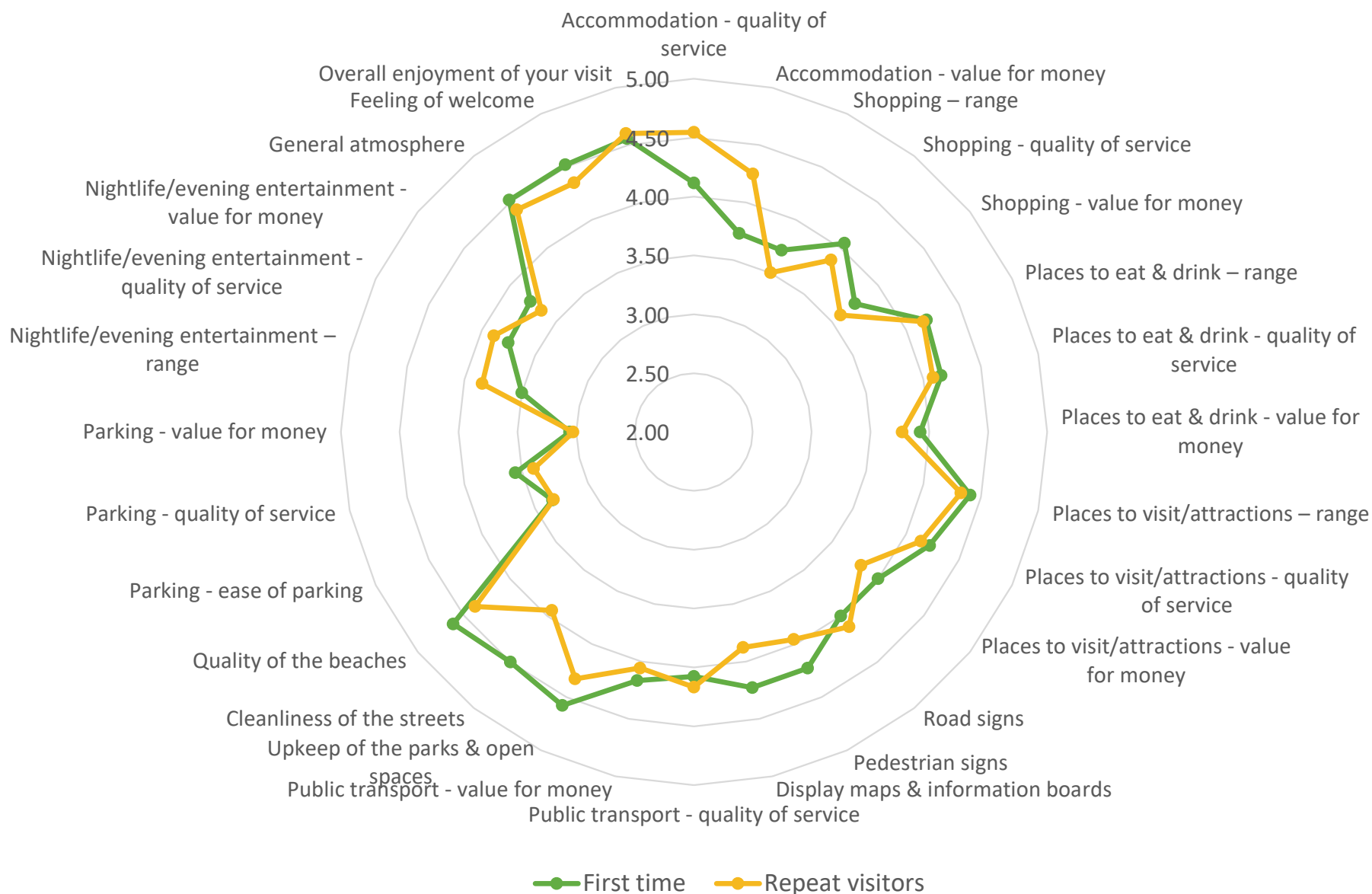- Overall enjoyment of your visit: 3.05

Legend: Day visitors — Staying visitors

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Visitor satisfaction categories and scores – first time vs. repeat visitors.

Satisfaction indicator score – by segment							
		First time visitors	Repeat visitors			First time visitors	Repeat visitors
1	Accommodation - quality of service	4.12	4.54	15	Public transport - quality of service	4.08	4.17
2	Accommodation - value for money	3.73	4.25	16	Public transport - value for money	4.17	4.06
3	Shopping – range	3.71	3.50	17	Upkeep of the parks & open spaces	4.58	4.33
4	Shopping - quality of service	4.05	3.87	18	Cleanliness of the streets	4.50	3.94
5	Shopping - value for money	3.75	3.59	19	Quality of the beaches	4.62	4.38
6	Places to eat & drink – range	4.19	4.16	20	Parking - ease of parking	3.33	3.32
7	Places to eat & drink - quality of service	4.15	4.08	21	Parking - quality of service	3.56	3.40
8	Places to eat & drink - value for money	3.92	3.77	22	Parking - value for money	3.06	3.03
9	Places to visit/attractions – range	4.41	4.33	23	Nightlife/evening entertainment – range	3.50	3.85
10	Places to visit/attractions - quality of service	4.22	4.14	24	Nightlife/evening entertainment - quality of service	3.75	3.89
11	Places to visit/attractions - value for money	4.00	3.82	25	Nightlife/evening entertainment - value for money	3.78	3.66
12	Road signs	4.00	4.11	26	Overall impression of the English Riviera in terms of general atmosphere	4.52	4.41
13	Pedestrian signs	4.23	3.95	27	Overall impression of the English Riviera in terms of feeling of welcome	4.52	4.35
14	Display maps & information boards	4.23	3.88	28	Overall enjoyment of your visit	4.56	4.60

With the exception of accommodation, on the whole first time visitors typically had higher satisfaction levels than repeat visitors to the resort.

Visitors were very happy with their whole visit to the resort.

Overall enjoyment of visit, the quality of service at accommodation, general atmosphere, quality of the beaches on The English Riviera and feeling of welcome were the top five ranked categories out of the twenty eight explored by the survey – a fantastic outcome for the resort so heavily associated with its' coastline and they reflect well on the whole visit to The English Riviera (quality of service at accommodation, enjoyment of visit, impression of general atmosphere and feeling of welcome), all of which perhaps offer marketing potential.

Of the bottom five categories, with scores of 3.60 or less, the bottom three were related to parking and the fourth and fifth to shopping. With respect to parking there are always things that can be done but whether visitors will ever be 'happy' with parking is another matter completely.

Satisfaction indicator	Score	Ranking	Satisfaction indicator	Score	Ranking
Overall enjoyment of your visit	4.60	1	Pedestrian signs	3.97	15
Accommodation - quality of service	4.52	2	Cleanliness of the streets	3.96	16
Overall impression of the English Riviera in terms of general atmosphere	4.42	3	Display maps & information boards	3.89	17
Quality of the beaches	4.39	4	Shopping - quality of service	3.88	18
Overall impression of the English Riviera in terms of feeling of welcome	4.36	5	Nightlife/evening entertainment - quality of service	3.88	18
Upkeep of the parks & open spaces	4.34	6	Nightlife/evening entertainment – range	3.84	20
Places to visit/attractions – range	4.33	7	Places to visit/attractions - value for money	3.82	21
Accommodation - value for money	4.22	8	Places to eat & drink - value for money	3.78	22
Places to eat & drink – range	4.16	9	Nightlife/evening entertainment - value for money	3.66	23
Public transport - quality of service	4.16	9	Shopping - value for money	3.60	24
Places to visit/attractions - quality of service	4.14	11	Shopping – range	3.51	25
Road signs	4.11	12	Parking - quality of service	3.40	26
Places to eat & drink - quality of service	4.09	13	Parking - ease of parking	3.32	27
Public transport - value for money	4.06	14	Parking - value for money	3.03	28

Visitor satisfaction categories and scores 2022 vs 2021.

On the whole, visitor satisfaction levels decreased slightly compared with 2021 levels. The only exceptions to this were the range of places to eat and value for money of parking, which remained at the same level as during 2021, and the range of places to visit/attractions and range of nightlife/evening entertainment, which both increased slightly compared with last year.

Satisfaction indicator score – all visitors	2021	2022	Satisfaction indicator score – all visitors	2021	2022
Accommodation - quality of service	4.55	4.52	Public transport - quality of service	4.33	4.16
Accommodation - value for money	4.24	4.22	Public transport - value for money	4.18	4.06
Shopping – range	3.60	3.51	Upkeep of the parks & open spaces	4.39	4.34
Shopping - quality of service	3.97	3.88	Cleanliness of the streets	4.01	3.96
Shopping - value for money	3.68	3.60	Quality of the beaches	4.41	4.39
Places to eat & drink – range	4.16	4.16	Parking - ease of parking	3.40	3.32
Places to eat & drink - quality of service	4.14	4.09	Parking - quality of service	3.44	3.40
Places to eat & drink - value for money	3.86	3.78	Parking - value for money	3.03	3.03
Places to visit/attractions – range	4.28	4.33	Nightlife/evening entertainment – range	3.79	3.84
Places to visit/attractions - quality of service	4.17	4.14	Nightlife/evening entertainment - quality of service	3.90	3.88
Places to visit/attractions - value for money	3.91	3.82	Nightlife/evening entertainment - value for money	3.71	3.66
Road signs	4.19	4.11	Overall impression of the English Riviera in terms of general atmosphere	4.44	4.42
Pedestrian signs	4.05	3.97	Overall impression of the English Riviera in terms of feeling of welcome	4.42	4.36
Display maps & information boards	3.92	3.89	Overall enjoyment of your visit	4.63	4.60

On the whole, visitor satisfaction levels decreased slightly compared with 2021 levels.

Radar chart comparing visitor satisfaction levels across the following categories for 2021 (red) and 2022 (blue), on a scale from 2.50 to 5.00:

- Accommodation - quality of service
- Accommodation - value for money
- Shopping – range
- Shopping - quality of service
- Shopping - value for money
- Places to eat & drink – range
- Places to eat & drink - quality of service
- Places to eat & drink - value for money
- Places to visit/attractions – range
- Places to visit/attractions - quality of service
- Places to visit/attractions - value for money
- Road signs
- Pedestrian signs
- Display maps & information boards
- Public transport - quality of service
- Public transport - value for money
- Upkeep of the parks & open spaces
- Cleanliness of the streets
- Quality of the beaches
- Parking - ease of parking
- Parking - quality of service
- Parking - value for money
- Nightlife/evening entertainment – range
- Nightlife/evening entertainment - quality of...
- Nightlife/evening entertainment - value for...
- General atmosphere
- Feeling of welcome
- Overall enjoyment of your visit

Legend: 2021, 2022

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Quality accommodation.

Accommodation is such a key component of any staying visit that poor quality can impact upon the whole visit and the general impression of an area making it vitally important that this aspect is well received.

Satisfaction scores for The English Riviera were high with a score of 4.52 for quality of service (the second highest ranked indicator of all twenty eight factors explored during the 2022 survey) and a score of 4.22 for value for money (ranked eighth). If visitors have a perception of receiving value for money it can go a long way to achieving satisfaction overall.

How would you rate the following aspects of your ACCOMMODATION on The English Riviera?

Ave. score (out of max. 5.00)

Quality of service
- 1%
- 1%
- 1%
- 8%
- 26%
- 64%

4.52

Value for money
- 1%
- 2%
- 15%
- 38%
- 44%

4.22

Legend: ■ Very poor ■ Poor ■ Average ■ Good ■ Very good

(N = 522)

70
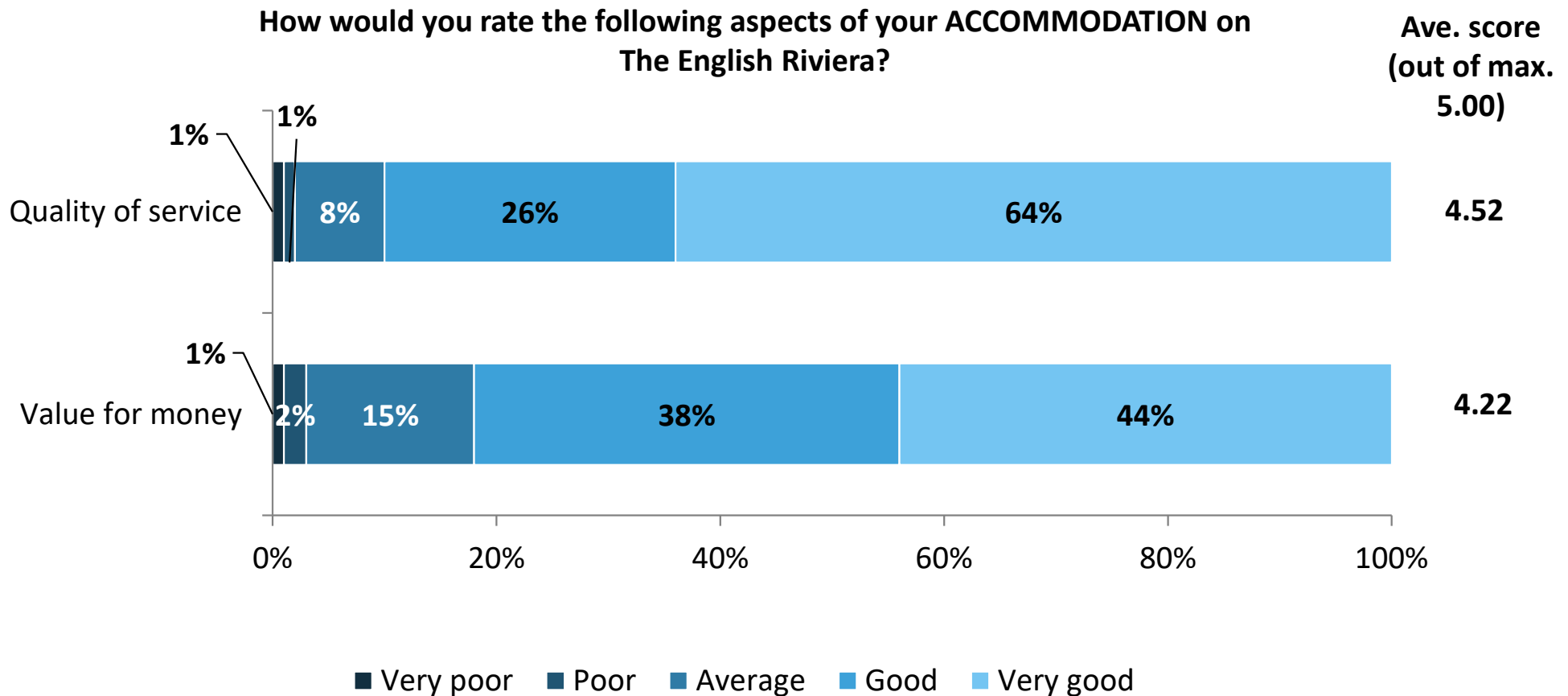
A mixed bag for shopping.

The satisfaction scores achieved for shopping can be categorised as average with scores above three but less than four for each aspect rated. They are all also towards the bottom end of the scores for the twenty eight categories rated in the survey and, as such, there is room for improvement.
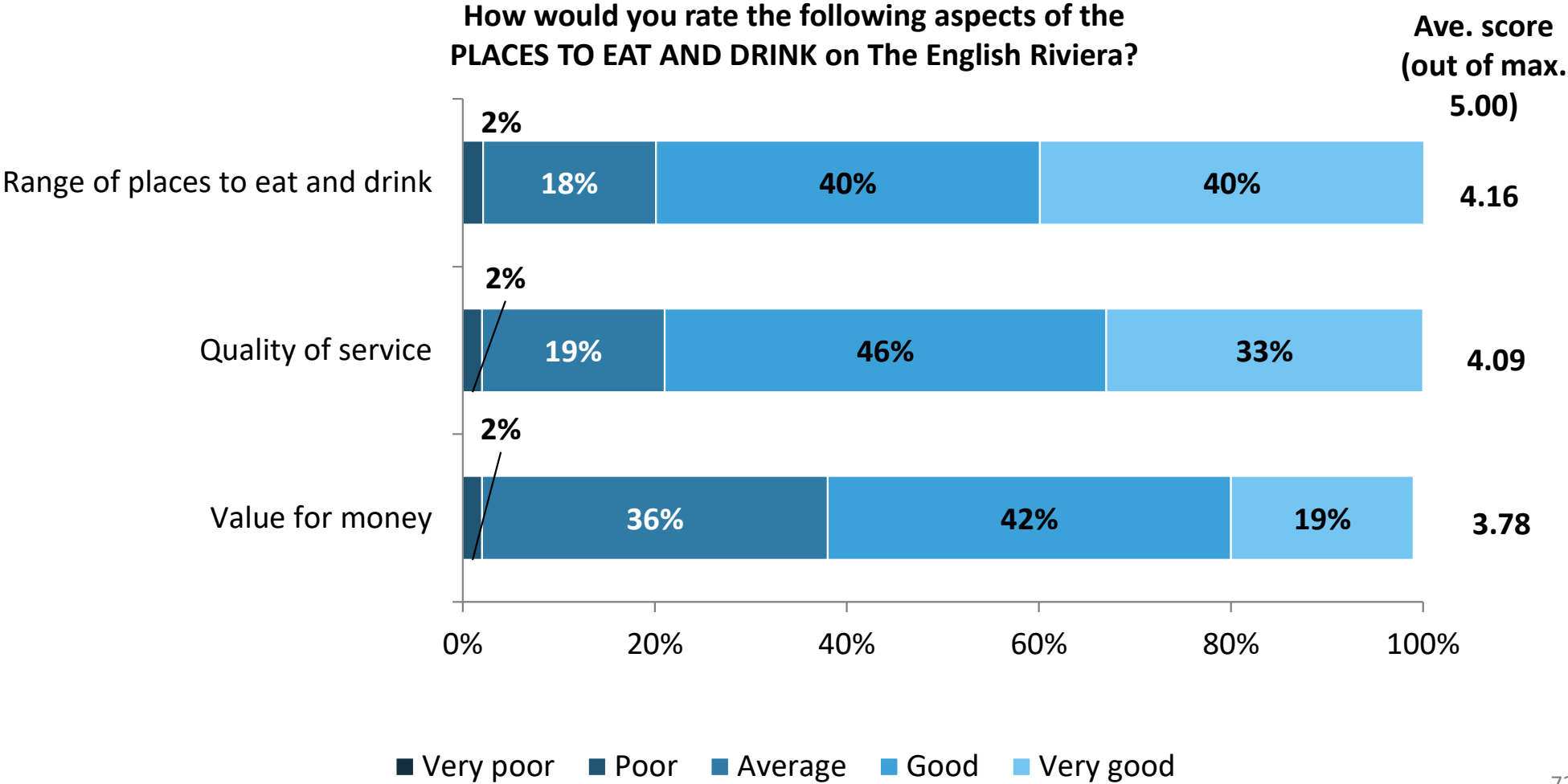
The top rated aspect of shopping is the quality of service and a sign that businesses are taking this most important aspect seriously. This is perhaps an area which requires a better understanding before considering taking any action. Whilst the majority of visitors do shop during their visit to The English Riviera it is not a main reason or driver for visits and it's unlikely to be compared to the main urban centres available nearby. The main attractions are the places to visit/things to see and do and the area's natural beauty such as the beaches (all of which achieved high satisfaction scores) so perhaps having all of these features plus shopping could be seen as a real opportunity for the resort as it can offer a varied visit and something which appeals to everyone.

How would you rate the following aspects of SHOPPING on The English Riviera?

Ave. score (out of max. 5.00)

Aspect	Very poor	Poor	Average	Good	Very good	Ave. score
Range of shops	3%	11%	37%	33%	17%	3.51
Quality of service	3%		29%	45%	23%	3.88
Value for money	3%		47%	36%	14%	3.60

Legend: ■ Very poor ■ Poor ■ Average ■ Good ■ Very good
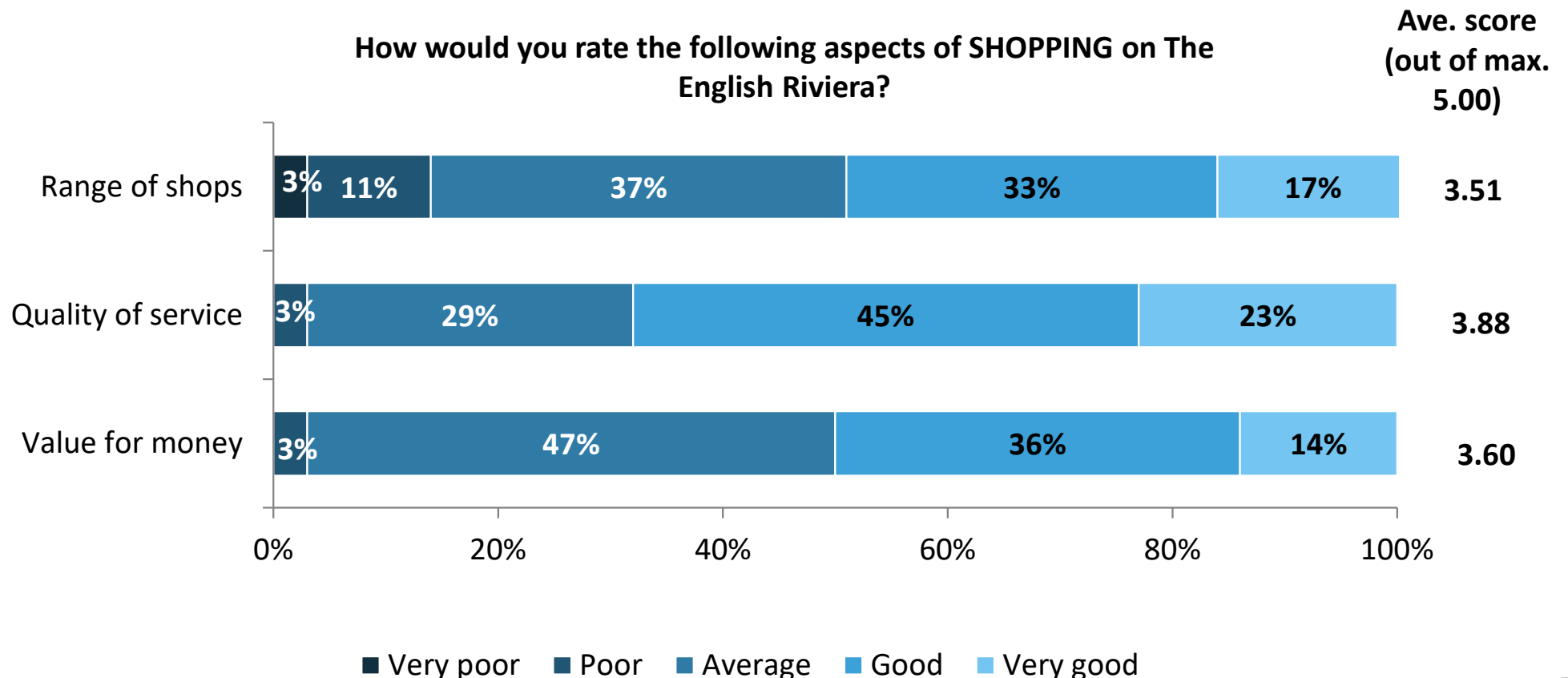
Good range of places to eat and drink out and quality of service.

Scores were high for both the range of places to eat and drink out in the resort and the quality of service both achieving scores in excess of four.

The value for money aspect of eating and drinking out scored lower and below the value for money scores for accommodation, public transport and places to visit/attractions resulting in it being the twenty second lowest score of the twenty eight explored by the survey. Whilst satisfactory, it is an area that can be improved upon.

How would you rate the following aspects of the PLACES TO EAT AND DRINK on The English Riviera?

Ave. score (out of max. 5.00)

Range of places to eat and drink
2%
18% | 40% | 40%
4.16

Quality of service
2%
19% | 46% | 33%
4.09

Value for money
2%
36% | 42% | 19%
3.78

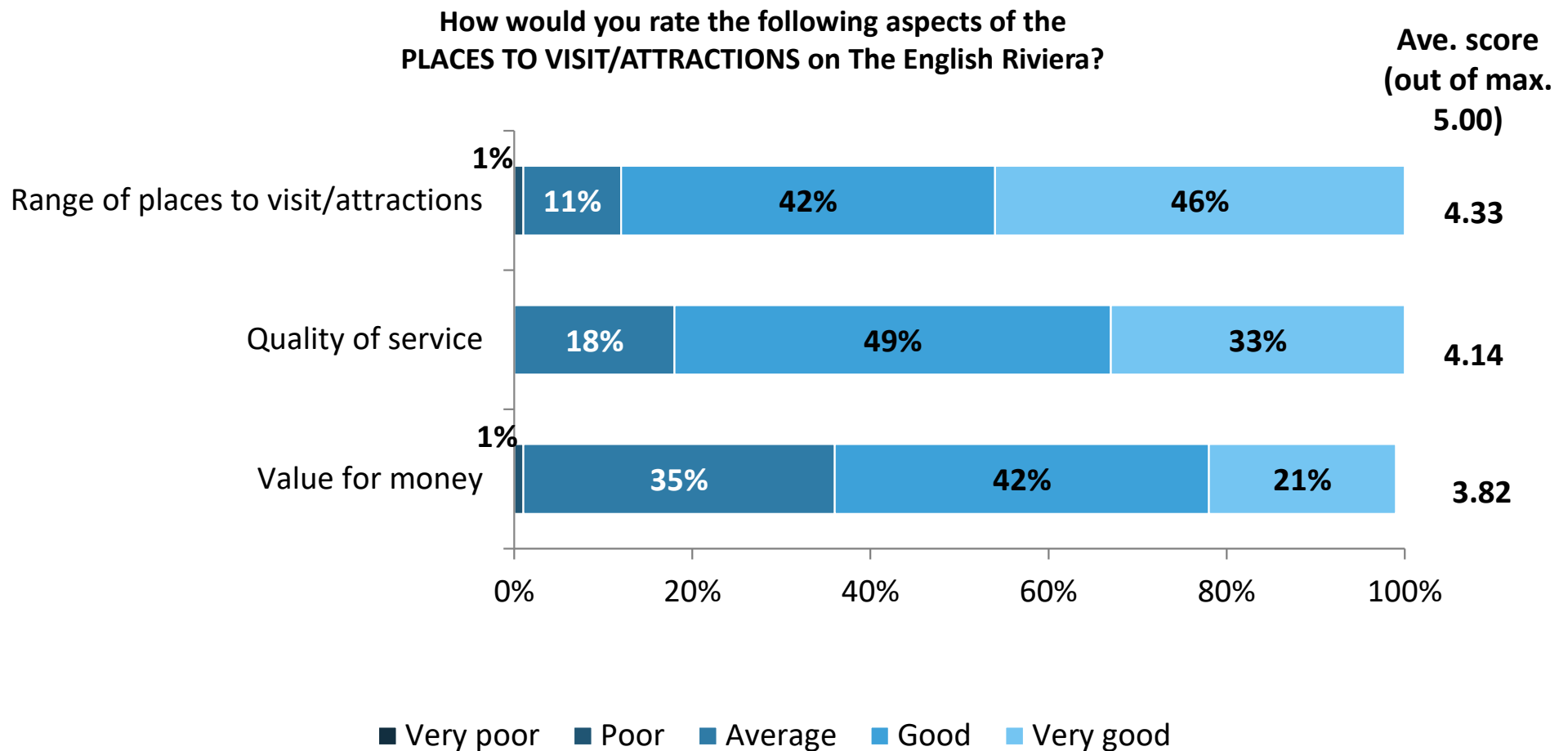■ Very poor ■ Poor ■ Average ■ Good ■ Very good

(N = 595)

Healthy state of visitor attractions.

The satisfaction scores achieved for both the range of places to visit/attractions on The English Riviera and the quality of service were high both achieving scores in excess of four out of five. The score for the range of places to visit/attractions was within the top 10 scores achieved during the 2022 survey (seventh).

Whilst value for money achieved a lower score of 3.82 this is nonetheless the third highest value for money aspect explored in the survey behind the value for money of accommodation and public transport.

How would you rate the following aspects of the PLACES TO VISIT/ATTRACTIONS on The English Riviera?

Ave. score (out of max. 5.00)

	Very poor/Poor	Average	Good	Very good	Ave. score
Range of places to visit/attractions	1%	11%	42%	46%	4.33
Quality of service		18%	49%	33%	4.14
Value for money	1%	35%	42%	21%	3.82

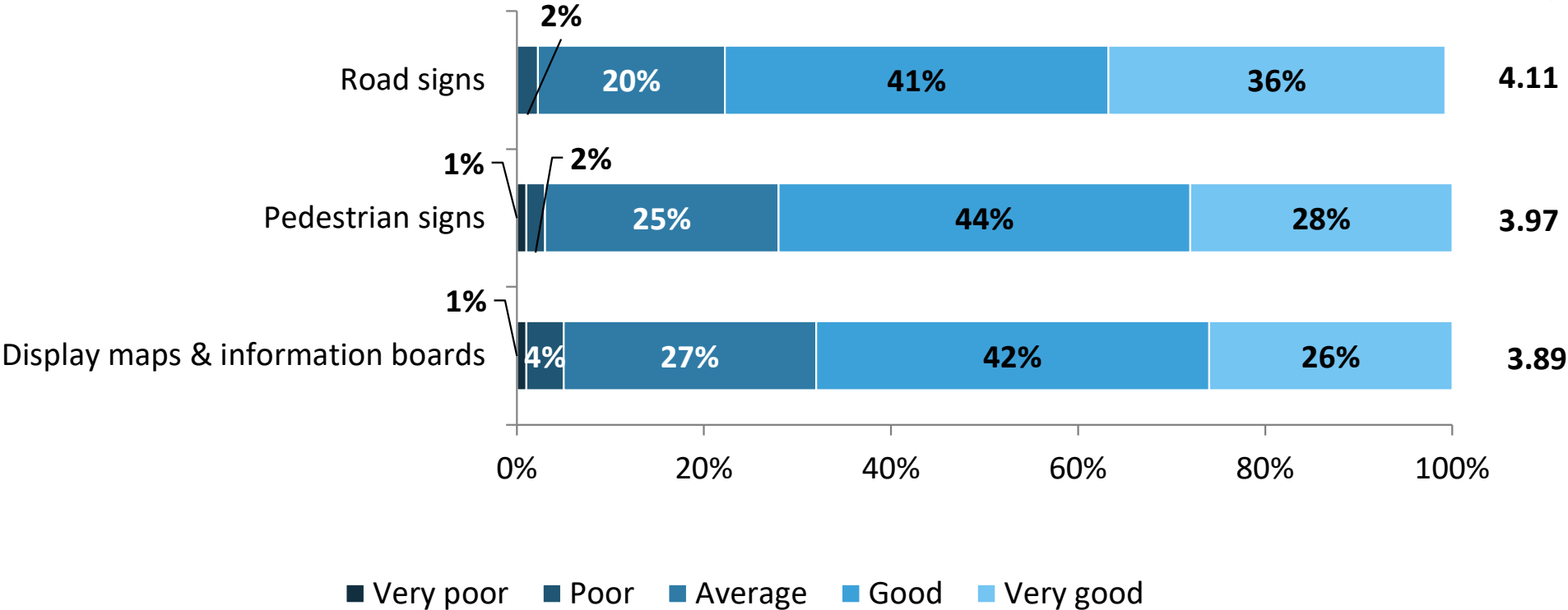■ Very poor ■ Poor ■ Average ■ Good ■ Very good

Signage heading in the right direction.

Signage for road users received a good visitor satisfaction score of 4.11 out of 5.00. Pedestrian signage and display maps and information boards were both rated very slightly lower at 3.97 and 3.89 out of 5.00 respectively. The score for road signs was ranked twelfth during the 2022 survey.

The scores are generally positioned around the mid-point of the twenty eight factors explored through this survey and, as such, there is room for improvement (as always) but it would appear that this is not a priority at this moment in time.

How would you rate the EASE OF FINDING YOUR WAY AROUND The English Riviera?

Ave. score (out of max. 5.00)

Category	Very poor	Poor	Average	Good	Very good	Ave. score
Road signs		2%	20%	41%	36%	4.11
Pedestrian signs	1%	2%	25%	44%	28%	3.97
Display maps & information boards	1%	4%	27%	42%	26%	3.89

■ Very poor　■ Poor　■ Average　■ Good　■ Very good
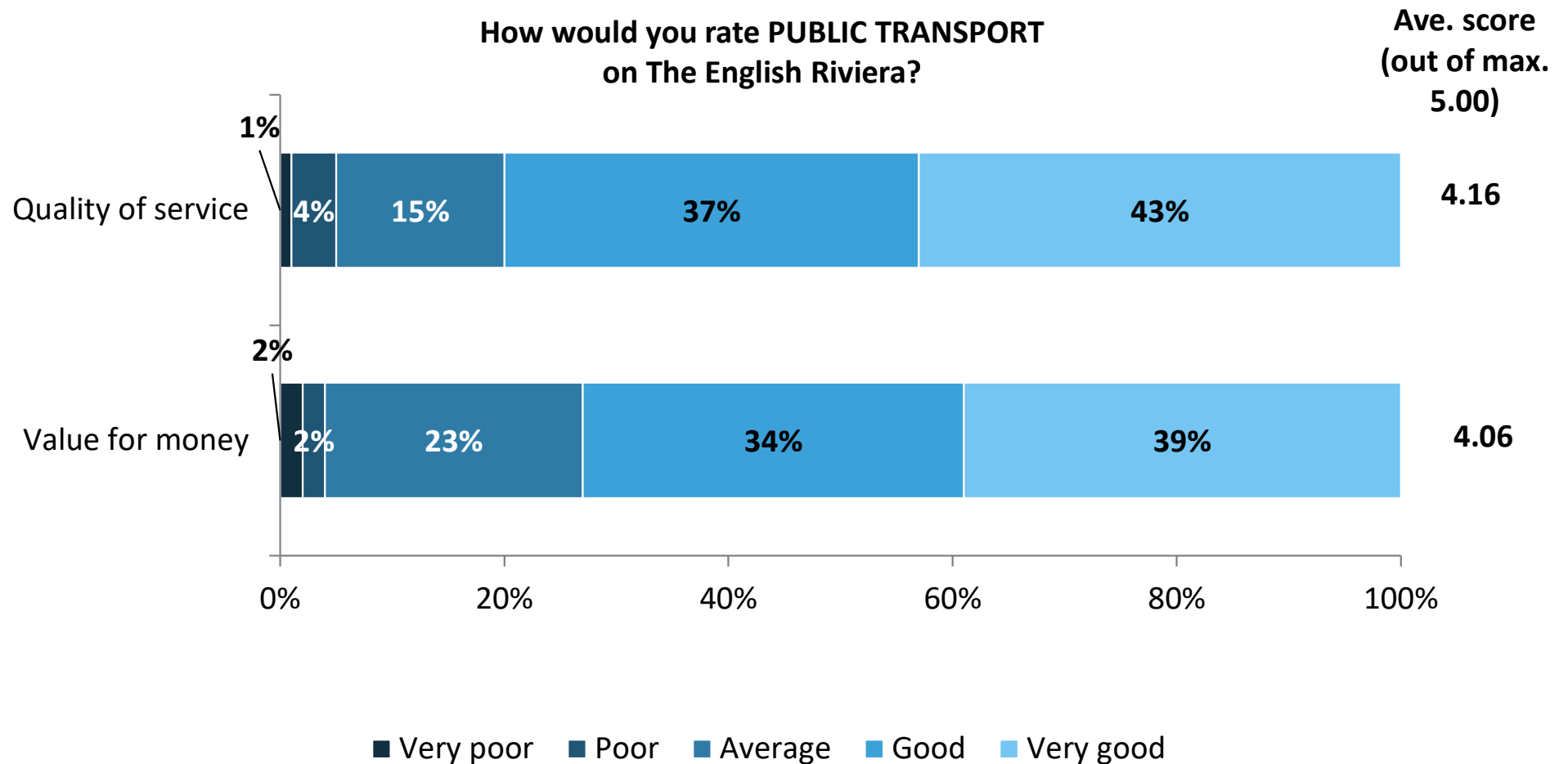
(N = 595)

All positive for public transport.

Both aspects of public transport tested received good satisfaction scores with the quality of service and value for money rated to similar levels. Quality of service, at 4.16, was ranked the ninth highest score out of the twenty eight factors explored by the survey.

Considering that generally speaking public transport is the sort of topic that people are usually very quick to highlight the inefficiencies of the results of this survey should be viewed very positively.

How would you rate PUBLIC TRANSPORT on The English Riviera?

Ave. score (out of max. 5.00)

Quality of service
1%
4% | 15% | 37% | 43%
4.16

Value for money
2%
2% | 23% | 34% | 39%
4.06

0%   20%   40%   60%   80%   100%

■ Very poor ■ Poor ■ Average ■ Good ■ Very good
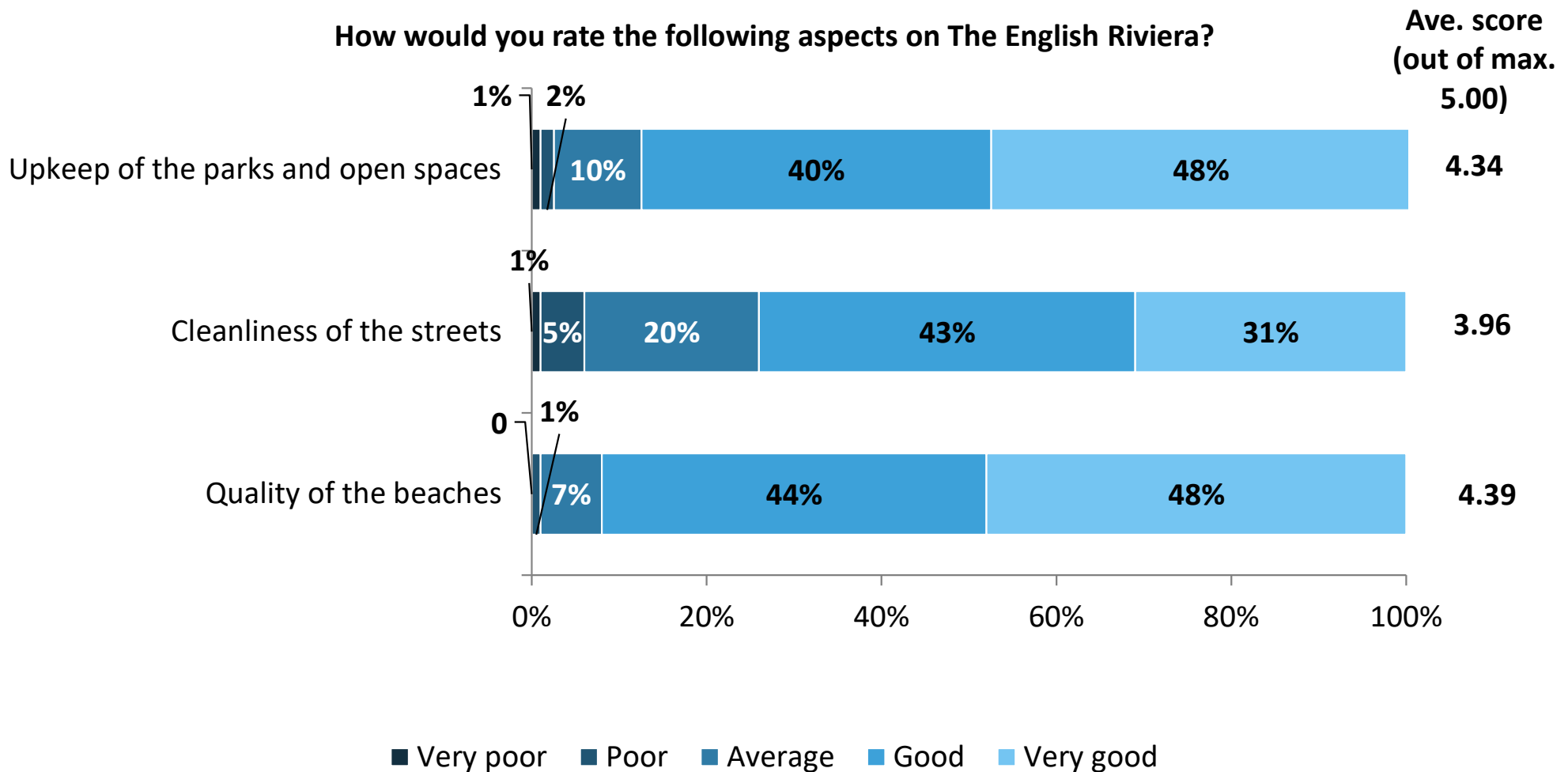
(N = 595)

The resort cleans up well and has wonderful beaches.

Scores for both the upkeep of the parks and open spaces in the resort (4.34) and the cleanliness of the streets (3.96) were both high. The score for the parks and open spaces was within the top 10 ranked indicators of those explored by the 2022 survey (sixth place).

The score achieved for the quality of the beaches on The English Riviera was the fourth highest rated factor explored by this survey and, again, offers potential marketing material to the ERBID. 92% of visitors rated the quality of the beaches as good (44%) or very good (48%).

How would you rate the following aspects on The English Riviera?

Ave. score (out of max. 5.00)

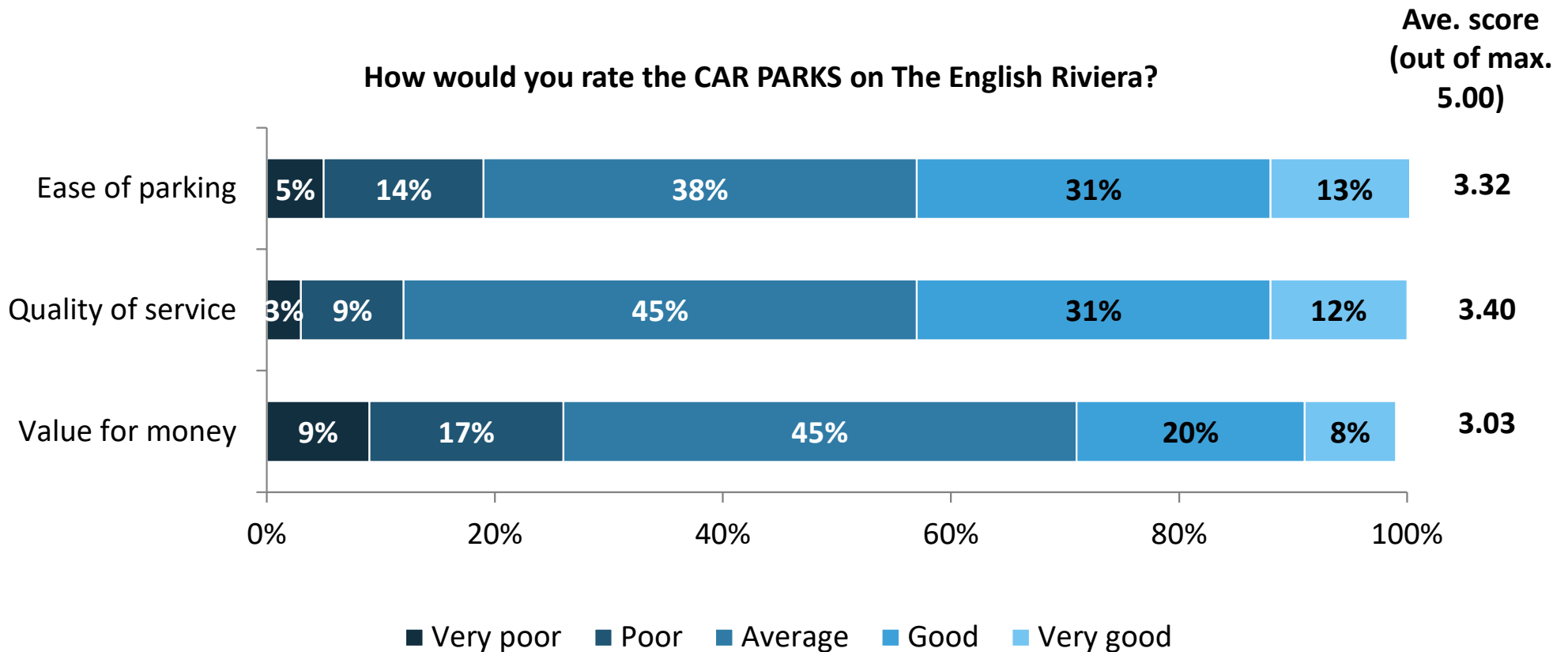|		Ave. score
Upkeep of the parks and open spaces	1% 2% 10% 40% 48%	4.34
Cleanliness of the streets	1% 5% 20% 43% 31%	3.96
Quality of the beaches	0 1% 7% 44% 48%	4.39

Legend: ■ Very poor ■ Poor ■ Average ■ Good ■ Very good

(N = 595)

Parking priority for improvement?

The satisfaction scores achieved for parking were the three bottom scores recorded for the twenty eight aspects explored by this survey. As such, it could be assumed that these are priorities for improvement and especially considering that it is very likely that a high proportion of visitors to the resort arrive by car.

Whilst it would appear that parking is a major issue it is probably an area that again requires further investigation before investing time and money into making any changes. For example, what would value for money look like for parking and is it feasible? Would reducing parking costs increase dwell time and visitor spend to negate any loss in revenue? Is there a need for more year round parking or is capacity just a peak period issue? It is also the sort of issue where the ability to really change opinions has to be questioned and a balance reached – will people generally ever be happy with parking?

How would you rate the CAR PARKS on The English Riviera?

Ave. score (out of max. 5.00)

	Very poor	Poor	Average	Good	Very good	Ave. score
Ease of parking	5%	14%	38%	31%	13%	3.32
Quality of service	3%	9%	45%	31%	12%	3.40
Value for money	9%	17%	45%	20%	8%	3.03

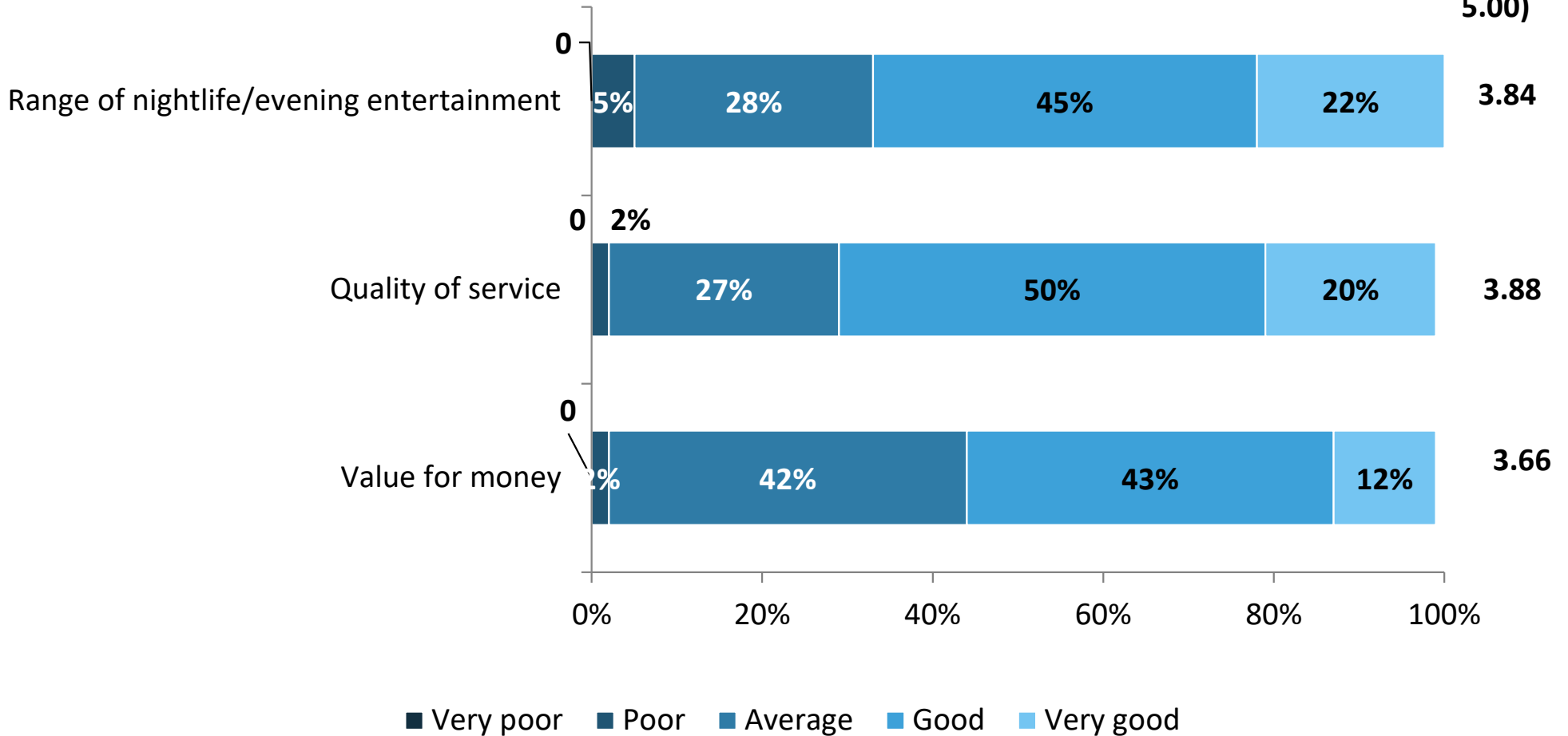■ Very poor ■ Poor ■ Average ■ Good ■ Very good

(N = 595)

Spotlight needed on nightlife.

All aspects of nightlife/evening entertainment received relatively low satisfaction scores compared to the other factors tested through this survey. All three factors were ranked in the bottom ten scores with value for money ranked sixth, range ninth and quality of service tenth lowest and, as a result, should be a priority for improvement.

How would you rate the NIGHTLIFE/EVENING ENTERTAINMENT on The English Riviera?

Ave. score (out of max. 5.00)

Range of nightlife/evening entertainment
0
5% | 28% | 45% | 22%
3.84

Quality of service
0 | 2%
27% | 50% | 20%
3.88

Value for money
0
2% | 42% | 43% | 12%
3.66

Legend: ■ Very poor ■ Poor ■ Average ■ Good ■ Very good
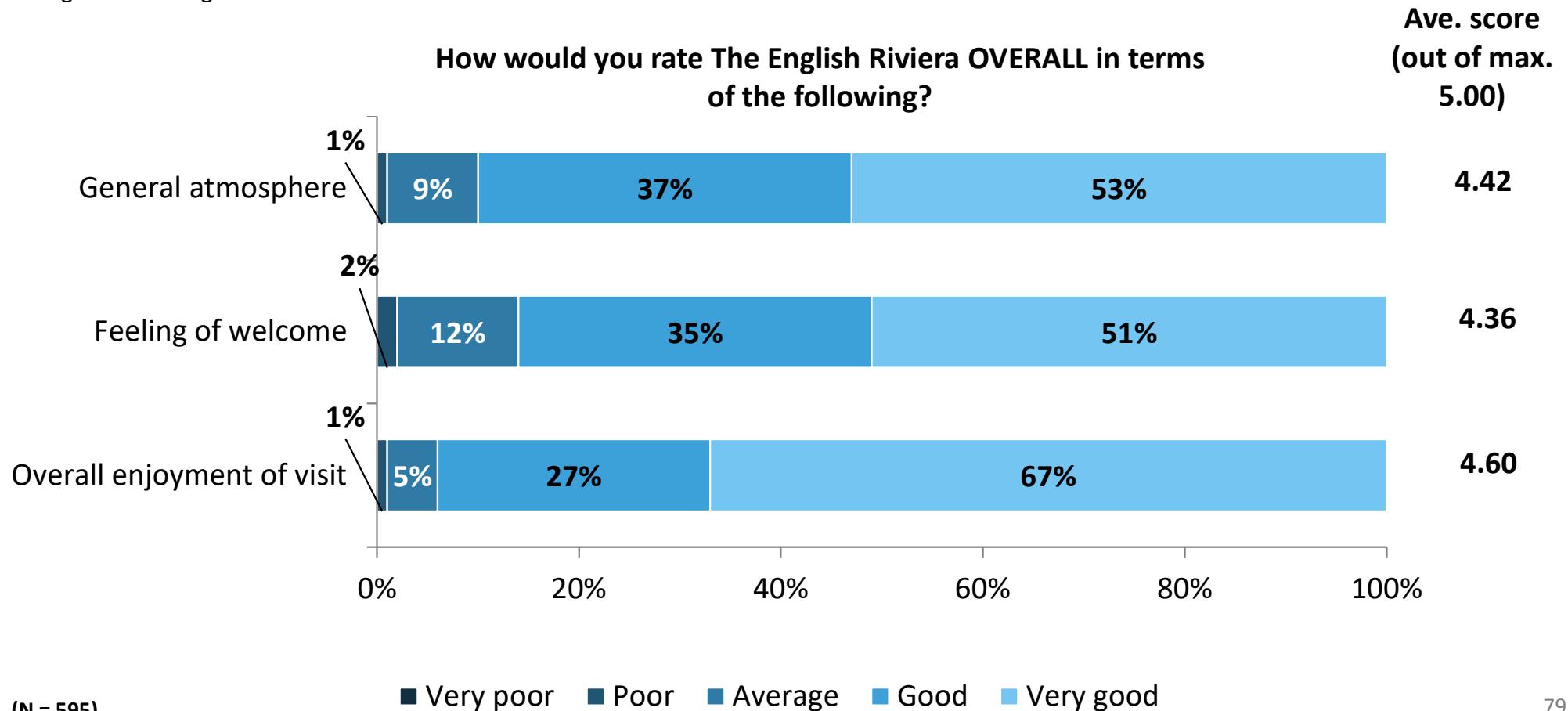
(N = 595)

Overall satisfaction levels are very good.

As previously stated earlier in this chapter, the scores for factors which relate to the holiday experience overall were very high and all featured in the top five factors ranked. The overall enjoyment of visit was ranked the highest factor of all twenty eight explored by the survey at 4.60 out of 5.00, general atmosphere was ranked third at 4.42 and feeling of welcome fifth at 4.36. This provides a very good indication that overall visitors are highly satisfied with their visitor experience on The English Riviera.

Whilst on the whole the 2022 satisfaction sores achieved were slightly lower across the board compared with last year (with only a few exceptions), in contrast to 2021, the scores were generally higher amongst first time visitors to the resort than those on a repeat visit. The only exception to this was their satisfaction with their accommodation which could be key to ensuring first time visitors make a return visit to the English Riviera again in the future.

How would you rate The English Riviera OVERALL in terms of the following?

Ave. score (out of max. 5.00)

Factor	Value
General atmosphere — 1%, 9%, 37%, 53%	4.42
Feeling of welcome — 2%, 12%, 35%, 51%	4.36
Overall enjoyment of visit — 1%, 5%, 27%, 67%	4.60

Legend: ■ Very poor ■ Poor ■ Average ■ Good ■ Very good

(N = 595)

The beaches were the main highlight of a visit to The English Riviera.

Visitors were asked what ONE thing they liked most about their visit to The English Riviera. A wide range of different responses were provided with the beaches mentioned as the main highlight by a large proportion of visitors.

The word cloud below summarises this and the full list of responses can be found in the appendix which accompanies this report.

Better/cheaper parking was the main disappointment of a visit to The English Riviera.

Visitors were also asked what ONE thing they disliked most about their visit to The English Riviera. A wide range of different responses were provided with better/cheaper car parking mentioned as the main disappointment by a large proportion of visitors.

The word cloud below summarises this and the full list of responses can be found in the appendix which accompanies this report.

Better/cheaper parking was the main factor which visitors would like to have seen improved to enhance their visit to The English Riviera.

Finally visitors were asked what, if anything they thought was missing on The English Riviera or which they thought could be improved. A wide range of different responses were provided with better parking mentioned again most frequently by respondents, along with an improved shopping offering and improving Torquay.

The word cloud below summarises this and the full list of responses can be found in the appendix which accompanies this report.

Likelihood to Recommend The English Riviera – Recommendation Score.

Recommendation scores are a simple but effective new method for measuring customer loyalty invented by Bain consultant Fred Reicheld who discovered that a single question provides the ultimate measure of just how loyal customers are and that this method could then be used to accurately predict future revenue growth.

Recommendation scores are calculated by asking a sample of customers a single question "How likely is it that you would recommend xyz to a friend or colleague?". The respondent is asked to rate on an 11 point scale from '0' (not at all likely) to '10' (extremely likely) depending on how positive they feel about the product/event/location. The proportion of those who think it unlikely they would recommend it (Detractors) subtracted from the proportion that are likely to recommend it (Promoters) produces a single number known as a Recommendation Score.

Based on their response to this question respondents are then divided into three distinct groups:

0-6 score are Detractors *These are customers that have generated sales but are actually bad for the company over the long haul. They are less likely to buy anything/visit the event/location again and more likely to spread bad word of mouth and more costly to serve because of their dissatisfaction.*

7-8 are Passives *These customers are generally more positive about the product/event/location but are significantly less valuable than Promoters. Many companies over estimate their success by assuming relatively high customer satisfaction will lead to future growth. In reality Passives may be satisfied but that may not be enough in the longer term.*

9-10 are Promoters *These customers drive business growth. The company/product/event/location has gone beyond satisfying their needs and truly delights them. As a result they will buy more from this company or visit an event or location again , will recommend it to many others and therefore the company/product/event/location will not need to undertake costly ad campaigns or sales promotions to retain their business.*

The Recommendation Score is created by calculating what percentage of the customer base are Promoters and then subtracting the percentage who are Detractors.

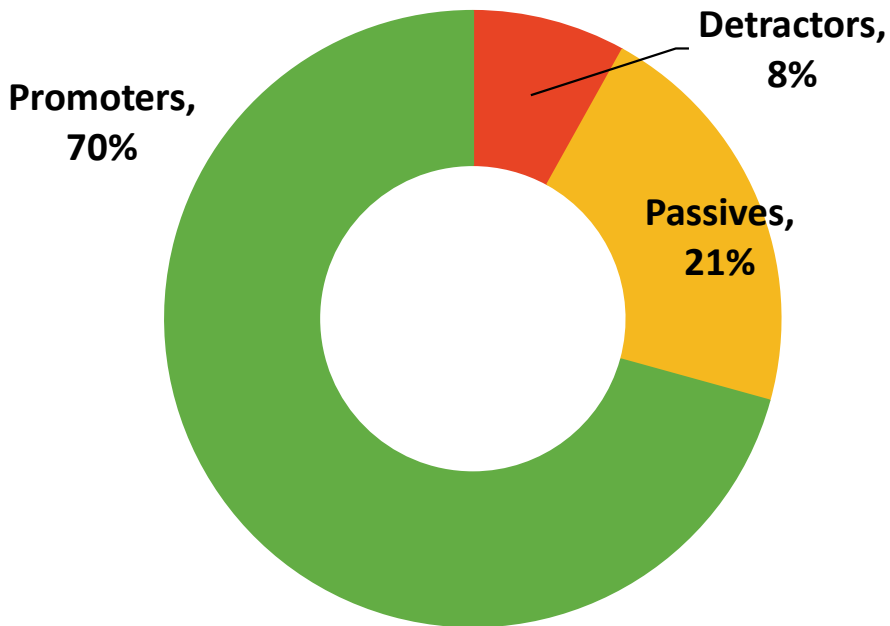**% Promoters - % Detractors = RECOMMENDATION SCORE**

The higher or more positive the Recommendation Score the more satisfied the customer base.

The resort received a good recommendation score.

The English Riviera achieved an overall Recommendation Score of +62%. This is a relatively high score on a metric that ranges from -100% to +100% and provides the resort with a wealth of invaluable free word of mouth promotion from its' visitors. It compares with a score of +61% in 2021.

70% of visitors rated it as '9' or '10' out of '10' for their likelihood of recommending it for a visit to their friends/family and were categorised as 'Promoters', 21% of visitors rated it either '7' or '8' out of '10' and were categorised as 'Passives', whilst 8% gave it a rating of '0' to '6' and were therefore categorised as 'Detractors'.

On a scale of '0' to '10' where '0' is 'extremely unlikely' and '10' is 'extremely likely', how likely would you be to recommend The English Riviera as a place to visit to your friends and/or family?

Promoters, 70%

Detractors, 8%

Passives, 21%

(N = 595)

Recommendation score +62%

| Recommendation score	Day visitors	Staying visitors	First time	Repeat visitors
Detractors	23%	6%	7%	8%
Passives	30%	20%	26%	21%
Promoters	47%	74%	67%	70%
RECOMMENDATION SCORE	+24%	+68%	+60%	+62%

Staying visitors achieved a much higher recommendation score than day visitors (+68% compared with +24%) whilst there was little difference in the scores for first time and repeat visitors to the resort (+60% and +62% respectively).

80% of all survey respondents will definitely visit the resort in the future.

80% of all survey respondents, who had visited the resort during 2022, said they definitely will visit The English Riviera in the future. A further 14% said they probably would and 6% said they possibly would. Only 1% were sure they would not visit in the future and when asked why this was the case many mentioned the area being run down/tired and/or needing updating.

Staying visitors were slightly more likely to say they would definitely re-visit in the future (81%) compared with day visitors (67%), as was the case for repeat visitors compared with those visiting for the first time during 2022 (80% and 70% respectively). It is worth noting however, that the proportion of first time visitors to the resort saying that they would definitely re-visit in the future (70%) has increased from 42% saying the same in 2021.

A higher proportion of visitors during the 2022 survey said they would definitely visit the resort in the future (80%) compared with those visiting during 2021 (72%).

Will you visit The English Riviera in the future?

Definitely	80%
Probably	14%
Possibly	6%
Not at all	1%
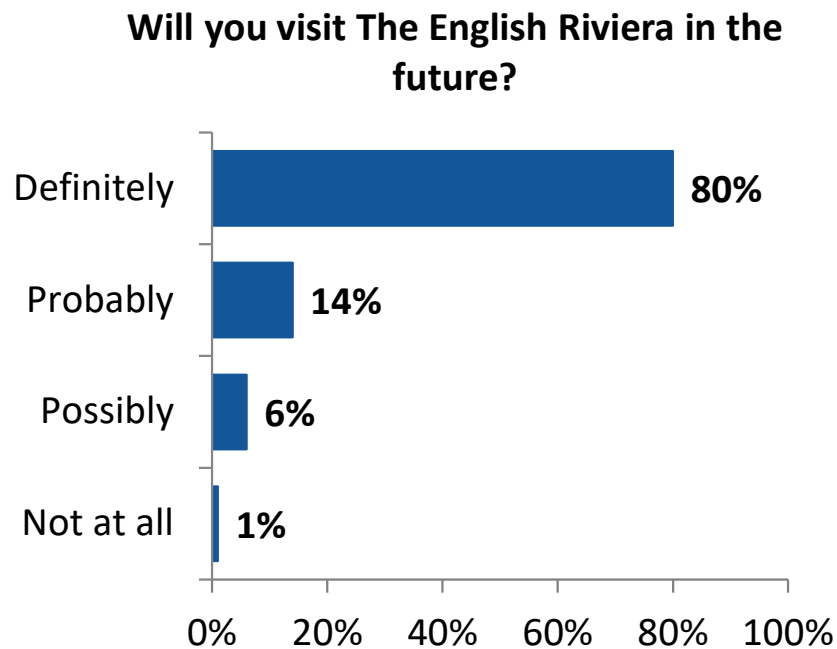
(N = 605)

| Whether will visit The English Riviera in the future	Day visitors	Staying visitors	First time	Repeat visitors
Definitely	67%	81%	70%	80%
Probably	15%	13%	19%	13%
Possibly	15%	4%	7%	6%
Not at all	3%	1%	4%	1%

34% of those who said they would definitely visit in the future had already booked for 2023.

Those respondents who said they would definitely visit the resort in the future were asked if they had booked to visit in 2023.

34% said they had including 33% of day visitors, 34% of staying visitors, 26% of first time visitors to the resort (an increase of 8% compared with 2021) and 35% of repeat visitors.

A higher proportion of visitors during the 2022 survey who said they would definitely visit the resort in the future had already booked for the following year (2023 - 34%) compared with those visiting during 2021 (2022 - 25%).

Have you booked to visit The English Riviera in 2022??

Yes — 34%
No — 66%

0% 20% 40% 60% 80% 100%
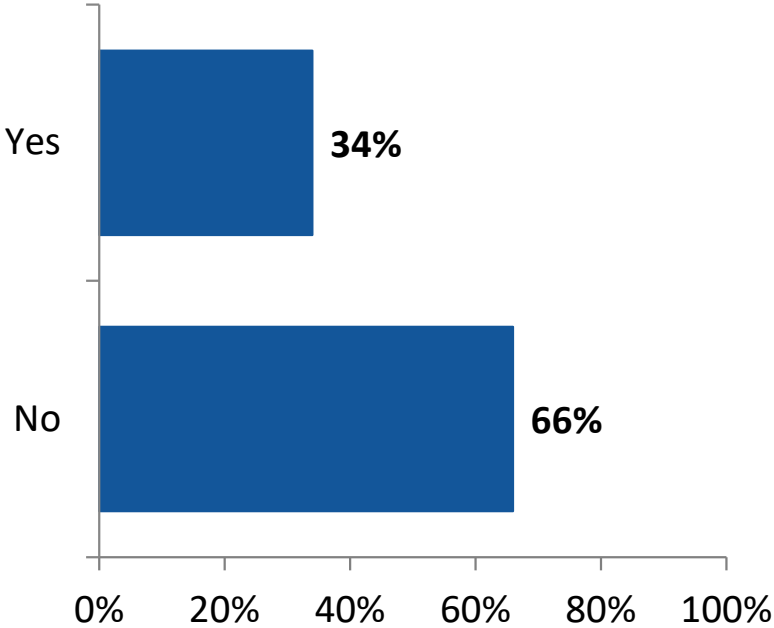
(N = 482)

Whether already booked to visit in 2022	Day visitors	Staying visitors	First time	Repeat visitors
Yes	33%	34%	26%	35%
No	67%	66%	74%	65%

30% in each case had already booked to visit in July and/or August 2023, 29% in September 2023 and 25% in June 2023.

34% of respondents who said they would definitely visit the resort in the future said they had booked to visit in 2023. The largest proportion, 30% in each case, said they would be visiting in July and/or August 2023, 29% in September 2023, 25% in June 2023 and 22% in May 2023.

There was little variation in the results according to visitor type, whether respondents were first time or repeat visitors to the resort or compared with the 2021 survey results.

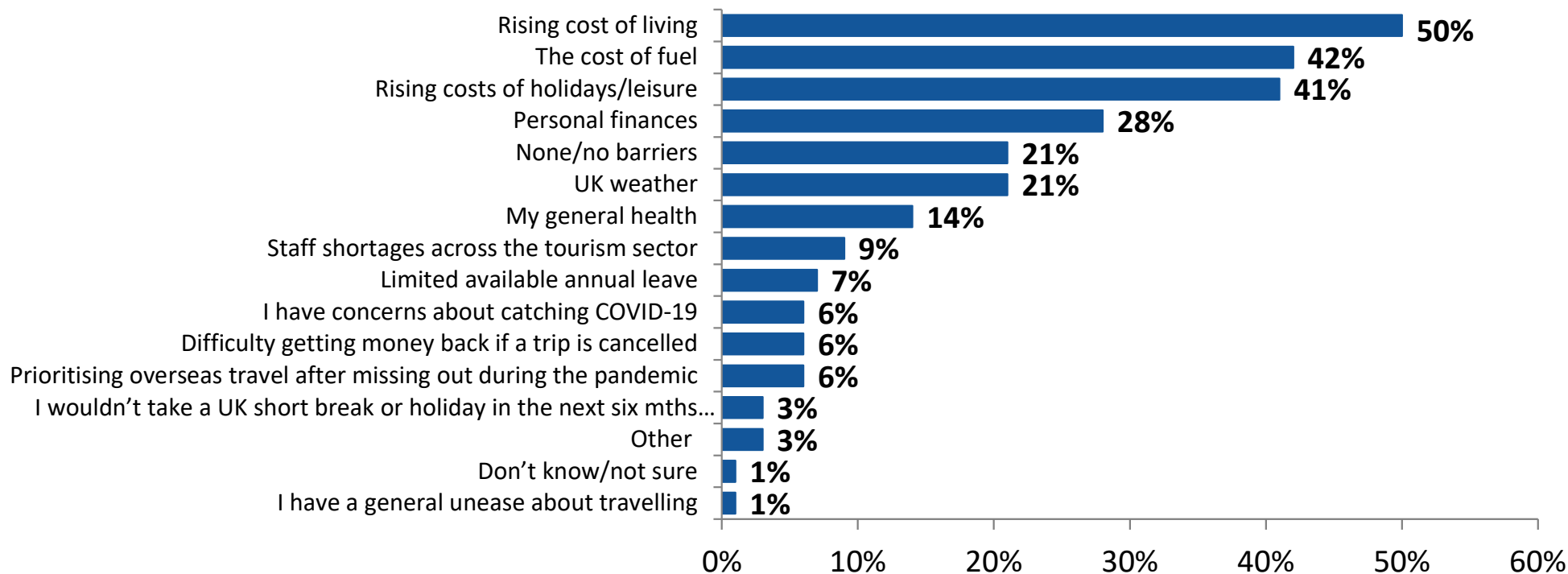**When will you be visiting?**
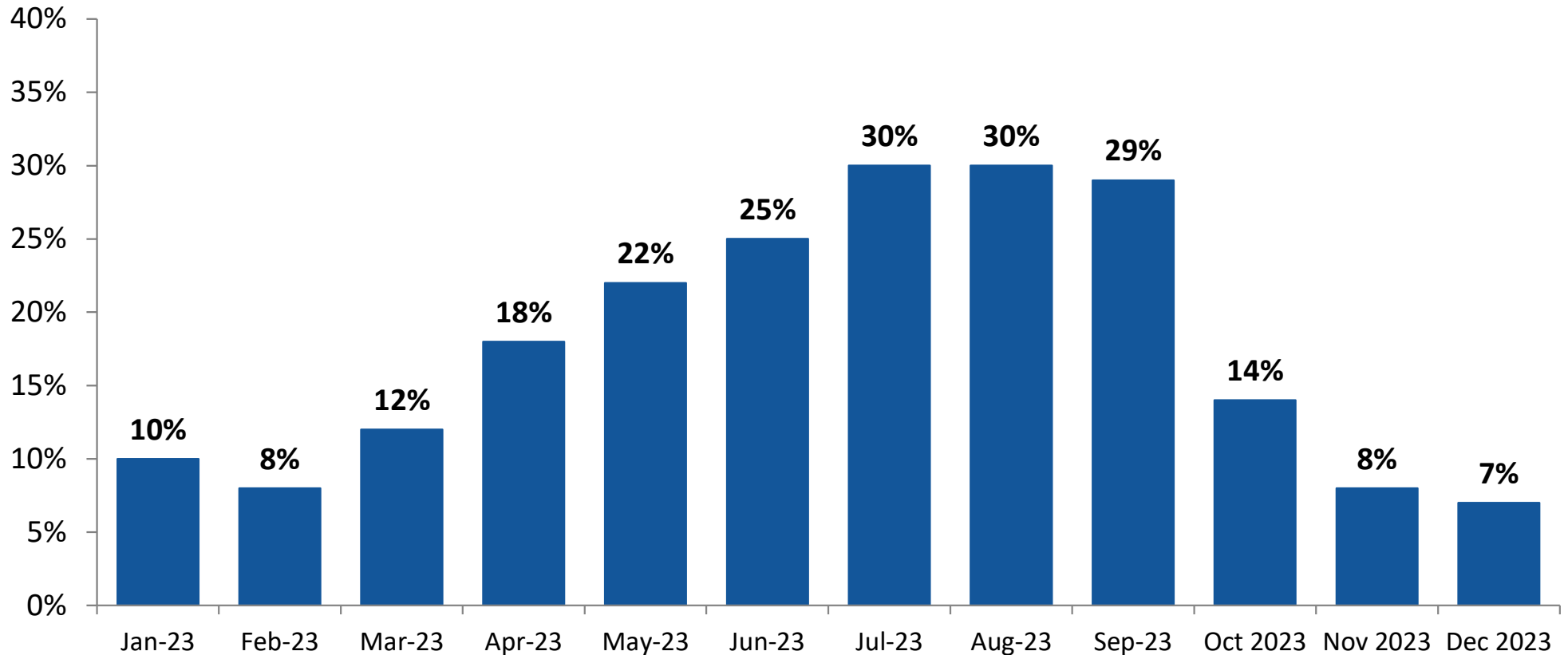
(N = 351, multiple response question)

The top three barriers to taking a UK short break or holiday in the next 6 months were; the rising cost of living, the cost of fuel and the rising costs of holiday/leisure.

For the first time during the 2022 survey, all survey respondents (regardless of whether they had visited the resort or not) were asked which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next 6 months?

The top three barriers were; the rising cost of living (50%), the cost of fuel (42%) and the rising costs of holiday/leisure (41%).

Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next 6 months?

Barrier	%
Rising cost of living	50%
The cost of fuel	42%
Rising costs of holidays/leisure	41%
Personal finances	28%
None/no barriers	21%
UK weather	21%
My general health	14%
Staff shortages across the tourism sector	9%
Limited available annual leave	7%
I have concerns about catching COVID-19	6%
Difficulty getting money back if a trip is cancelled	6%
Prioritising overseas travel after missing out during the pandemic	6%
I wouldn't take a UK short break or holiday in the next six mths…	3%
Other	3%
Don't know/not sure	1%
I have a general unease about travelling	1%

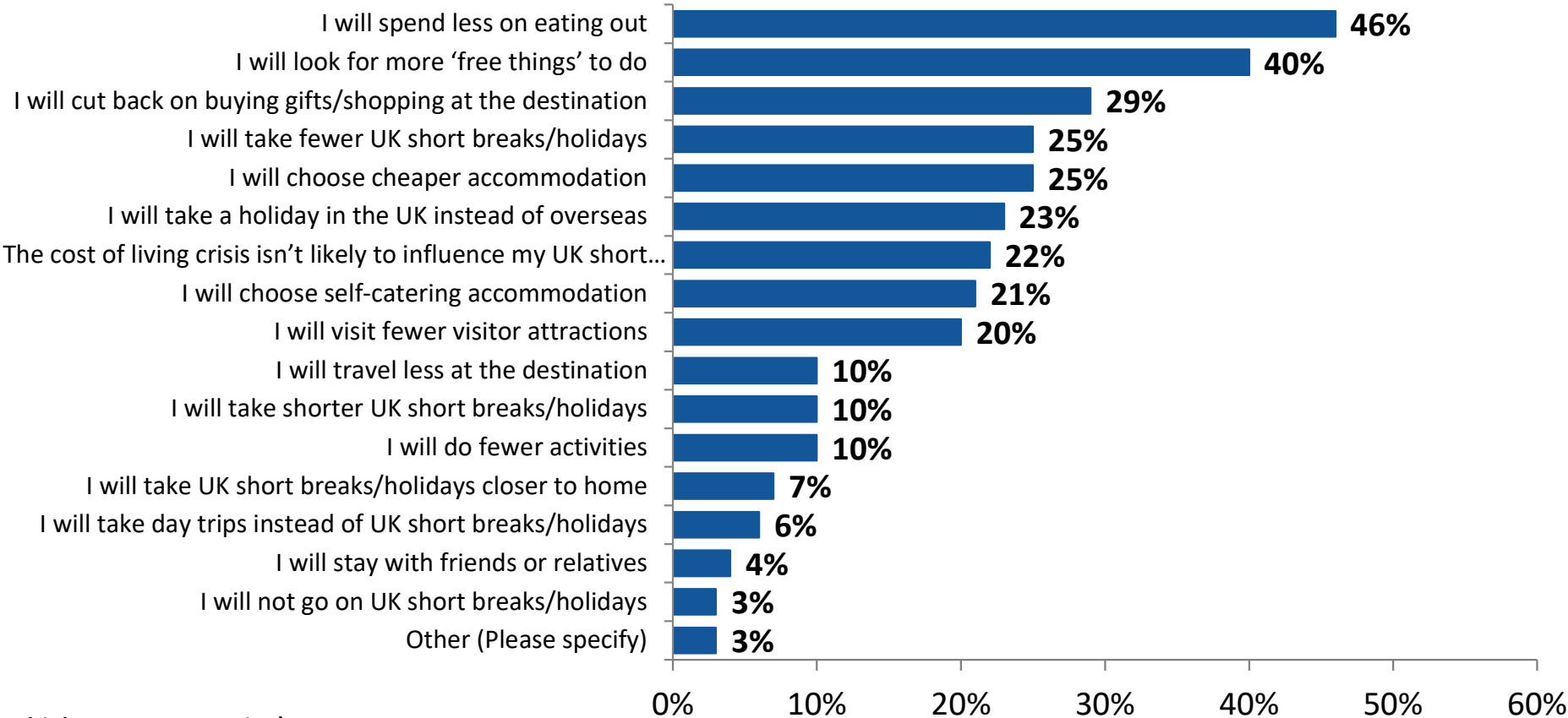**(N = 3,064 multiple response question)**

46% said they will spend less on eating out and 40% will look for more 'free things' to do. 25% will take fewer UK short breaks/holidays and 23% will take a holiday in the UK instead of overseas as a result of the 'cost of living crisis'.

They were also asked how, if at all, the 'cost of living crisis' is likely to influence their UK short breaks or holidays in the next 6 months. 46% said they will spend less on eating out, 41% will look for more 'free things' to do and 28% said they will cut back on buying gifts/shopping at a destination. In terms of trip taking changes; 25% said they will take fewer UK short breaks/holidays, 23% said they will take a holiday in the UK instead of overseas and 10% will take shorter UK short breaks/holidays.

How, if at all, would you say the 'cost of living crisis' is likely to influence your UK short breaks or holidays in the next 6 months?

Response	%
I will spend less on eating out	46%
I will look for more 'free things' to do	40%
I will cut back on buying gifts/shopping at the destination	29%
I will take fewer UK short breaks/holidays	25%
I will choose cheaper accommodation	25%
I will take a holiday in the UK instead of overseas	23%
The cost of living crisis isn't likely to influence my UK short…	22%
I will choose self-catering accommodation	21%
I will visit fewer visitor attractions	20%
I will travel less at the destination	10%
I will take shorter UK short breaks/holidays	10%
I will do fewer activities	10%
I will take UK short breaks/holidays closer to home	7%
I will take day trips instead of UK short breaks/holidays	6%
I will stay with friends or relatives	4%
I will not go on UK short breaks/holidays	3%
Other (Please specify)	3%

(N = 3,591, multiple response question)

Visitors' opinions of the English Riviera trend data 2022 vs 2021.

Recommendation score	2021	2022
Detractors	8%	8%
Passives	23%	21%
Promoters	69%	70%
Recommendation score	+61%	+62%

Will you visit The English Riviera in the future?	2021	2022
Definitely	72%	80%
Probably	17%	14%
Possibly	9%	6%
Not at all	2%	1%

Have you booked to visit The English Riviera in 2023?	2021	2022
Yes	25%	34%
No	75%	66%

When will you be visiting?	2021	2022
January	3%	10%
February	7%	8%
March	11%	12%
April	17%	18%
May	22%	22%
June	27%	25%
July	25%	30%
August	28%	30%
September	30%	29%
October	10%	14%
November	4%	8%
December	5%	7%

The English Riviera Visitor Survey 2022

Lapsed/Non-Visitors

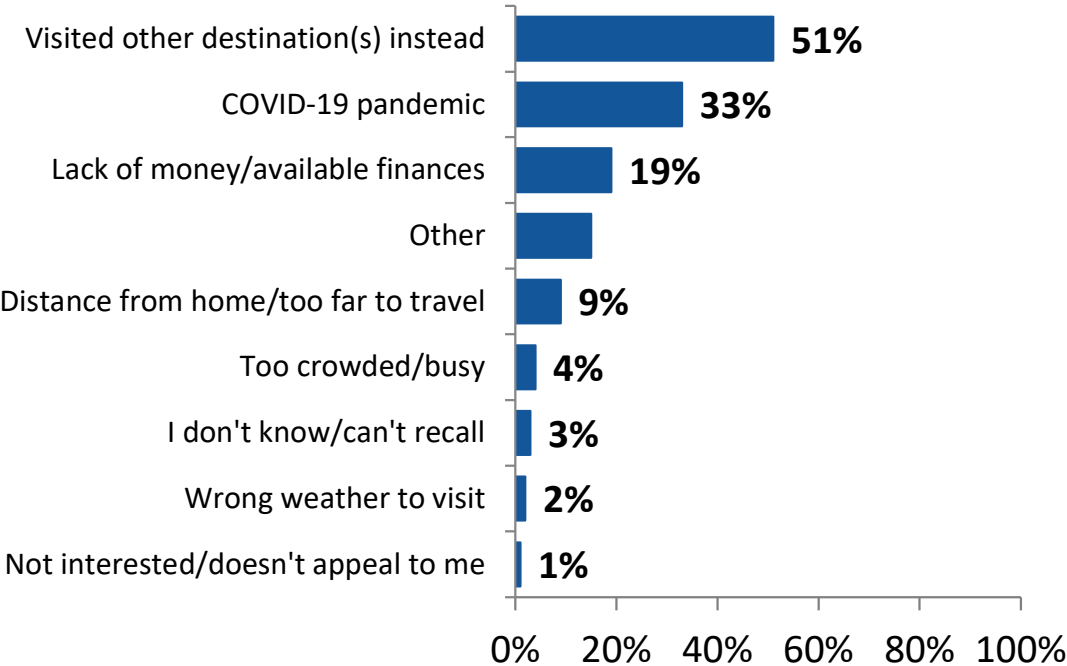*Those visiting before 2022 (528 respondents) & those who had never visited (44 respondents)*

Visiting other destinations instead was the main reason for not visiting the resort during 2022.

46% of all previous visitors to the resort had not visited The English Riviera during 2022 (lapsed visitors) and were routed to a separate section within the online survey asking them why this was the case. By far the largest proportion of these respondents (51%) said they had not visited because they had visited other destination(s) instead, 33% said it was due to the Covid-19 pandemic and 19% said it was due to a lack of money/available finances.

Reassuringly, 89% of these respondents said there had been no particular issues with their previous experience of visiting the resort which had deterred them from visiting during 2022. Amongst the 9% who said there were issues (46 respondents) these centred largely around Covid issues, the area being run down/scruffy/looking tired and/or accommodation being too expensive.

Why didn't you visit The English Riviera during 2022?

Category	Percentage
Visited other destination(s) instead	51%
COVID-19 pandemic	33%
Lack of money/available finances	19%
Other	
Distance from home/too far to travel	9%
Too crowded/busy	4%
I don't know/can't recall	3%
Wrong weather to visit	2%
Not interested/doesn't appeal to me	1%

(N = 693, multiple response question)

Were there any particular issues with your previous experience of visiting the English Riviera which deterred you from visiting the resort during 2022?
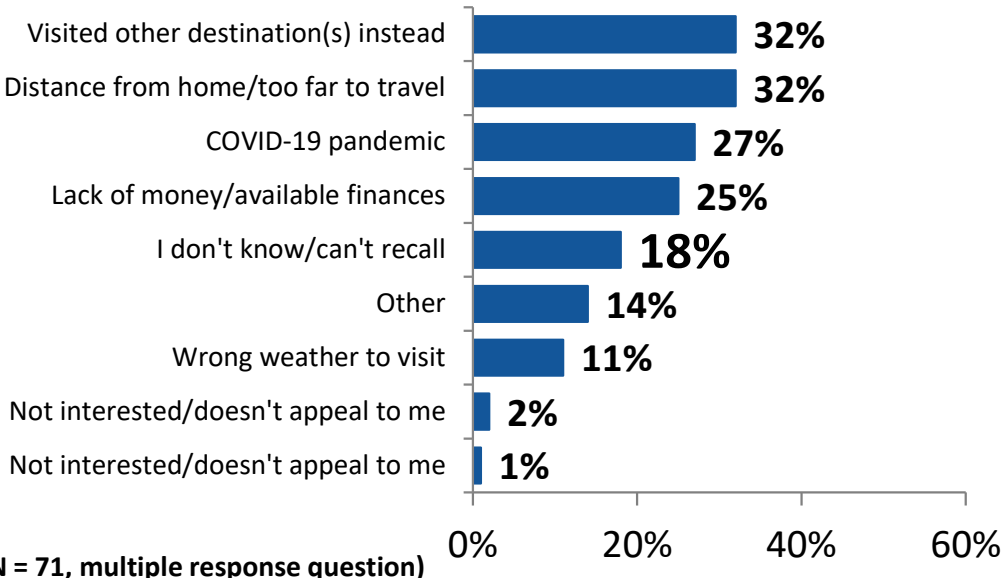
Don't know/can't remember, 2%

Yes, 9%

No, 89%
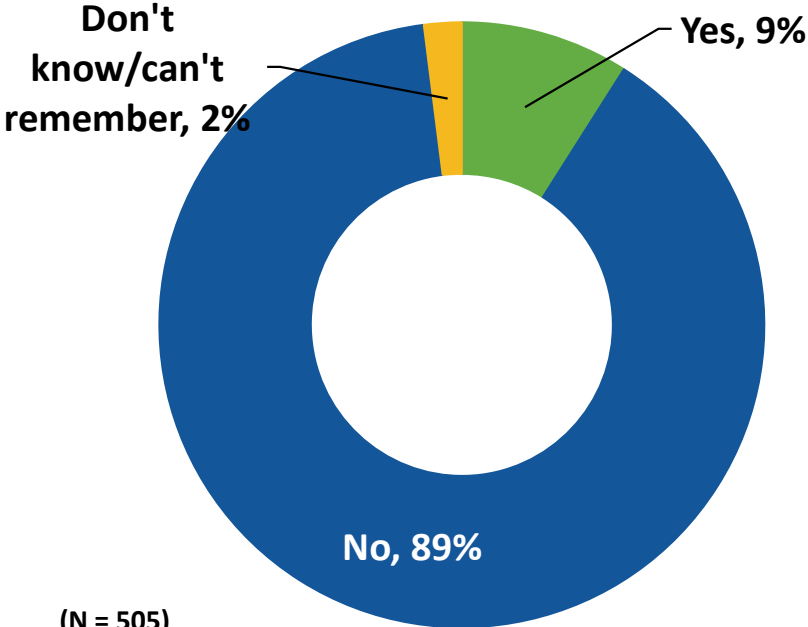
(N = 505)

Visiting other destinations and/or because of the distance of the resort from their own home/too far to travel were the main reasons for having never visited. 14% of non-visitors had preconceived perceptions about The English Riviera which prevented them from visiting.

4% of all survey respondents had never visited The English Riviera and they were asked why this was the case. 32% in each case said it was because they visited other destination(s) instead (including Cornwall, Dorset The Isle of Wight, Norfolk, North Devon and Wales to name a few) and/or it was because of the distance of the resort from their own home/too far to travel. 27% said is was due to the Covid-19 pandemic and 25% said it was due to a lack of money/available finances.

Whilst they had never visited the resort, 14% of these respondents (6 respondents) said they did have thoughts on what a visit to the resort would be like which were preventing them from visiting. On the whole, their issues related to Torquay being run down/scruffy and accommodation being perceived as too expensive.

Why have you never visited The English Riviera?

Visited other destination(s) instead	32%
Distance from home/too far to travel	32%
COVID-19 pandemic	27%
Lack of money/available finances	25%
I don't know/can't recall	18%
Other	14%
Wrong weather to visit	11%
Not interested/doesn't appeal to me	2%
Not interested/doesn't appeal to me	1%

(N = 71, multiple response question)

Whilst you have never visited The English Riviera, do you have any particular thoughts on what a visit to the resort would be like which are preventing you from visiting?

Yes, 14%
No, 50%
Don't know/unsure, 36%

(N = 69)
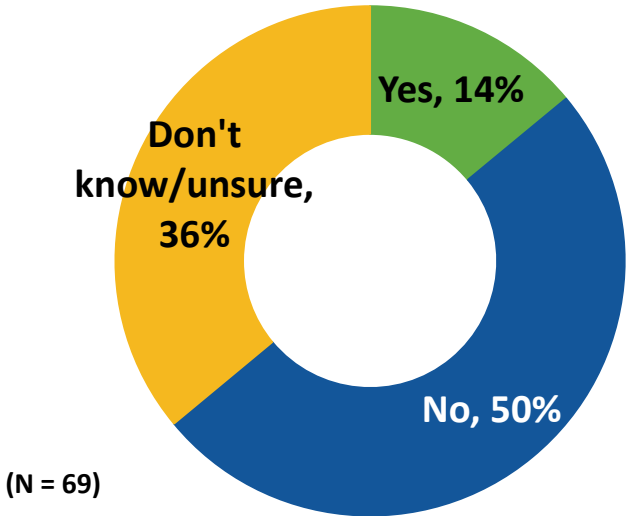
Lapsed/non-visitors trend data 2022 vs 2021.

Why didn't you visit The English Riviera during....?	2021	2022
COVID-19 pandemic	74%	33%
Visited other destination(s) instead	28%	51%
Lack of money/available finances	11%	19%
Not interested/doesn't appeal to me	0%	1%
Distance from home/too far to travel	11%	9%
Too crowded/busy	7%	4%
Wrong weather to visit	1%	2%
I don't know/can't recall	2%	3%
Other	9%	15%

Were there any particular issues with your previous experience of visiting the English Riviera which deterred you from visiting the resort during....?	2021	2022
Yes	6%	9%
No	92%	89%
Don't know/can't remember	2%	2%

Why have you never visited the English Riviera?	2021	2022
COVID-19 pandemic	41%	27%
Visited other destination(s) instead	38%	32%
Lack of money/available finances	16%	25%
Not interested/doesn't appeal to me	0%	2%
Distance from home/too far to travel	28%	32%
Too crowded/busy	3%	0%
Wrong weather to visit	10%	11%
I don't know/can't recall	15%	18%
Other	7%	14%

Whilst you have never visited The English Riviera, do you have any particular thoughts on what a visit to the resort would be like which are preventing you from visiting?	2021	2022
Yes	23%	14%
No	45%	50%
Don't know/unsure	32%	36%

The English Riviera Visitor Survey 2022