

The English Riviera Visitor Survey 2021

Final Report



Produced for and on behalf of The English Riviera BID Company

by The South West Research Company Ltd.

January 2022



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The English Riviera Visitor Survey 2021

Key Findings & Conclusions



Key Findings

This report presents the findings of The English Riviera Visitor Survey 2021 from an online survey conducted amongst the ERBID's consumer email database during October and November 2021. The survey achieved a sample of 1,367 respondents (aged 16+ years), 1,298 of whom had visited the resort and 715 who had done so during 2021. 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 2021, a year when the ongoing Covid-19 pandemic and its restrictions 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 key findings from the research are as follows:

Visitor Profile

- 52% were female and 46% were male.
- 78% had no dependent children living with them in their household.
- 37% were employed full-time (30+ hours per week) and 5% worked part-time (8-29 hours per week). 30% were retired with a company/private pension and 8% with a state pension only.
- 39% were aged 65+ years and 32% were aged 55-64 years. 24% were aged 54 years or under.
- 99% were UK residents. 20% of these lived in the South West region including approximately 4% in each case who lived in the Bristol 'BS' or Gloucester 'GL' postcode areas.
- 79% were UK residents who lived elsewhere outside the South West region including approximately 6% who lived in the Birmingham 'B' postcode area, 4% who lived in Derby and 3% in the Dudley 'DY' or Sheffield 'S' postcode areas.
- 1% were from overseas (6 respondents).
- 58% had visited The English Riviera in a couple (husband/wife/partner) whilst 24% 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 7.09 nights.
- 89% were on a repeat visit to The English Riviera and 11% were first time visitors to the resort.

Key Findings

Characteristics of Visits

- 30% of 2021 visits took place during September, 27% during July and 25% during August.
- 92% had visited The English Riviera as part of a leisure/holiday related trip with this proportion increasing to 100% for those on their first visit to the resort. 6% were visiting friends or relatives.
- 41% of staying visitors had stayed in accommodation in Torquay and 31% in Paignton. 14% stayed in Brixham and 5% in Babbacombe. Torquay was by far the most popular choice of where to stay for first time staying visitors to the resort (61%).
- 53% of staying visitors had used serviced accommodation in the resort whilst 28% had used self catering accommodation. First time visitors to the resort were more likely to use serviced accommodation (63%) and less likely to use camping (4%) or static caravans (7%) than those on a repeat visit to the resort (52%, 7% and 13% respectively).

Information Sourcing & Booking Patterns

- 55% of staying visitors had booked their accommodation more than 12 weeks in advance of their visit. 38% booked up to 12 weeks in advance of their visit. Whilst the largest proportion of first time visitors to the resort booked more than 12 weeks in advance of their visit (49%) this was slightly lower than the proportion of repeat visitors who had done the same (56%)..
- 62% of staying visitors booked directly with their accommodation provider, 22% booked through an online travel agent (OTA) and 8% through an agency. A significantly higher proportion of repeat visitors booked direct with their accommodation provider (65%) compared with 38% of those on their first visit to the resort. 35% of those experiencing The English Riviera for the first time had booked through an online travel agent (21% of repeat visitors) and 17% through an agency (7% of repeat visitors).
- 67% of those using an OTA to book their accommodation had used Booking.com and 7% Airbnb.
- 60% of visitors had sourced information about The English Riviera to assist them either before or during their visit. This proportion increased to 90% of those on their first visit to the resort.
- 68% 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 31% up to 4 weeks prior to their visit. 29% sourced their information more than 12 weeks before their visit.

Key Findings

- 86% 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). 33% in each case had used a tourist information centre and/or a brochure/leaflet/guide to source their information (the majority mentioning The English Riviera Official Guide).
- 86% of visitors who had sourced information about visiting The English Riviera on the internet had used the www.englishriviera.co.uk website and 50% the www.visitdevon.co.uk website. 36% used review websites such as TripAdvisor and 29% 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 (66%) 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 (55%).
- 30% of visitors preferred to use their mobile phone to source and/or book their leisure related trips/activities online. 24% preferred to use a tablet, 23% a laptop computer and 13% a desktop computer.
- 64% of visitors used Facebook, 35% YouTube, 24% Instagram and 20% Twitter. Around a quarter of visitors (24%) said they did not use social media channels. On the whole, day visitors and first time visitors to the resort were more likely to use Facebook, Instagram and Twitter than staying visitors and those on a repeat visit to the resort.
- 65% of visitors who used social media channels said they had some level of influence on them when deciding where to eat & drink, 60% when deciding which events to attend, 52% when choosing which destinations to visit and 48% when deciding which types of accommodation to use. However, social media channels were only a major influence for around 1 in 10 people and slightly more of an influence on day rather than staying visitors and first time rather than repeat visitors.

Activity Taking

- By far the most popular activities undertaken by visitors were eating & drinking (95% took part including 13% for whom it was their main reason for visiting), visiting local attractions/places of interest (90% took part including 27% for whom it was their main reason for visiting), visiting the beach/sea (84% took part including 23% for whom it was their main reason for visiting) and shopping (74% took part including 7% 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 (60%), followed by outdoor sports/pursuits (49%), attending local events (48%) and/or taking part in water-based activities (46%).

Key Findings

Visitors' Opinions of The English Riviera

- With the exception of parking satisfaction levels overall were high.
- Staying visitors typically had higher satisfaction levels than day visitors.
- On the whole, repeat visitors typically had higher satisfaction levels than first time visitors to the resort.
- Overall enjoyment of visit, the quality of service at accommodation, general atmosphere, feeling of welcome and quality of the beaches on The English Riviera were the top five ranked categories out of the twenty eight explored by the survey.
- Of the bottom five categories, 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. Better/cheaper parking was the main disappointment of a visit to The English Riviera. Better/cheaper parking was also the main factor which visitors would like to have seen improved to enhance their visit to The English Riviera
- The English Riviera achieved an overall Recommendation Score of +61% (compared with +70% during the last visitor survey undertaken in 2016).
- Staying visitors achieved a much higher recommendation score than day visitors (+65% compared with +31%) and repeat visitors a much higher score than first time visitors (+64% compared with +39%).
- 26% of visitors said their trip to the resort had replaced a holiday that they would normally have taken abroad. This proportion increased to 67% of first time visitors compared with 21% of repeat visitors.
- Amongst the 74% of visitors who said their trip to the resort had not replaced one which would normally have been taken abroad, 29% said they had considered visiting other UK destinations before deciding on visiting The English Riviera (58% of first time visitors and 27% of repeat visitors).
- Familiarity with The English Riviera was a key reason for choosing to visit it for a holiday in preference to other UK destinations.
- For almost all aspects, The English Riviera competed well against overseas holidays with the majority of visitors (who normally would go abroad) saying the resort was 'as good as' or 'better' than their usual overseas holiday – in particular in terms of overall enjoyment of visit and feeling of welcome (79% of respondents in each case). In terms of its beaches and overall value for money however, 53% and 52% of respondents respectively did not consider the resort as good as its overseas counterparts.
- 59% of 2021 visitors who said their visit to the resort had replaced a holiday they would normally have taken abroad said they will return to holidaying abroad next year.

Key Findings

- 72% of all survey respondents said they definitely will visit The English Riviera in the future including 67% of respondents who said they planned to return to holidaying abroad next year.
- 24% of respondents who said they would definitely visit the resort in the future said they had booked to visit in 2022 including 22% of respondents who said they planned to return to holidaying abroad next year.
- The largest proportion, 30%, said they would be visiting in September 2022, 28% in August 2022, 27% in June 2022 and 25% in July 2022.

Lapsed/Non-Visitors

- By far the largest proportion of previous visitors to the resort who had not visited during 2021 (lapsed visitors) (74%) said it was due to the Covid-19 pandemic.
- 41% of all survey respondents had never visited The English Riviera said it was due to the Covid-19 pandemic, 38% said they visited other destination(s) instead.

Conclusions

The findings from this report should offer the ERBID some valuable insights to use in future marketing and communication strategies moving forward as the industry continues to try to recover and return to normal after the events of 2020/21 associated with the Covid-19 pandemic. The key conclusions that we came to reading this report were;

- Overall people who visit The English Riviera generally love it! Visitors' satisfaction scores for the areas which relate to the holiday experience such as overall enjoyment of visit, general atmosphere and feeling of welcome all featured in the top five satisfaction factors ranked by the survey and provides a very good indication that overall visitors are highly satisfied with their visitor experience on The English Riviera. The resort achieved an overall recommendation score of +61% which is a very high score and provides The English Riviera with a wealth of invaluable free word of mouth promotion from its' visitors.
- However, it is also worth highlighting that those who visit the resort regularly and/or stay overnight on The English Riviera generally rate their experience higher than those who are trying out the resort for the first time and/or are just visiting for the day and first impressions amongst these visitors need to be improved if the ERBID is to succeed in converting them into becoming regular, repeat visitors to the resort. Focussing on the main attractors and associations for regular, repeat visitors and also looking at the differentials between visitor types to see where they are falling short and need to improve should help them in doing this.
- Whilst satisfaction scores were generally high for all areas the key factors for improvements, unsurprisingly, were parking, shopping facilities and nightlife/evening entertainment. Whilst it would appear that parking is a major issue it is probably an area that 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 paying for parking?
- Whilst the quality of service in the shops received a relatively good satisfaction score and is a sign that businesses are taking this most important aspect seriously, the scores for the range of shops and value for money were ranked fourth and fifth lowest of all the indicators explored by the survey. However, this also perhaps requires a better understanding before considering taking any action as whilst the majority of visitors do shop during their visit to The English Riviera it is not a key 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.

Conclusions

- All aspects of nightlife/evening entertainment received relatively low satisfaction scores compared to the other factors tested through this survey with all three factors ranked in the bottom ten scores with value for money and range ranked sixth and seventh lowest respectively and, as a result, should be a priority for improvement.
- It's probably no surprise that the internet is the most popular information source and the www.englishriviera.co.uk website is clearly a valuable information source having been used by 86% of visitors sourcing information on the internet which is a considerable proportion considering the high number of repeat visitors that already have knowledge of visiting the resort. On the whole, day visitors and first time visitors to the resort were more likely to use Facebook, Instagram and Twitter than staying visitors and those on a repeat visit to the resort and amongst those that do use them the majority said they had some level of influence on them when deciding where to eat & drink, deciding which events to attend and when choosing which destinations to visit. Although only around 1 in 10 visitors said social media channels had a major influence on their decision making.
- In terms of activities which were the key drivers for visits, 27% of respondents said visiting local attractions/places of interest had been the main reason for them visiting The English Riviera along with 23% who said the same for visiting the beach/sea, 16% for walking/nature-based activities, 13% for eating & drinking and 11% for history/heritage-based and whilst there were good levels of participation and interest in taking part in other activities/experiences they were not their key drivers for visits to the resort.
- During 2021 the resort attracted around a quarter of visitors who typically would normally have taken their holiday abroad with this increasing to 67% of those who were trying out the resort for the first time. Amongst these visitors, for almost all aspects, The English Riviera competed well against overseas holidays with the majority considering the resort to be 'as good as' or 'better' than their usual overseas holiday – in particular in terms of overall enjoyment of visit and feeling of welcome and excellent PR for the ERBID. Encouragingly, whilst half of these visitors said they will return to holidaying abroad next year (including 55% of first time visitors to the resort), regardless however, 67% said they will definitely visit The English Riviera in the future and 22% had already booked a visit for 2022 which is very encouraging news for the ERBID.
- 72% of all survey respondents said they definitely will visit The English Riviera in the future. Staying visitors were slightly more likely to say they would definitely re-visit in the future than day visitors as is the case for almost twice the proportion of repeat visitors compared with those visiting for the first time during 2021. A quarter of all respondents who said they will definitely visit said they had already booked for 2022 including 28% of day visitors, 35% of staying visitors, 18% of first time visitors to the resort and 36% of repeat visitors – all encouraging figures for the ERBID for 2022.

Conclusions

- Amongst those previous visitors who had decided against visiting the resort in 2021, by far the largest proportion said this was due to the Covid-19 pandemic and, reassuringly, around 9 out of 10 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 2021. Amongst these respondents who had decided to visit other UK destinations instead of The English Riviera, visiting family and wanting a change/to visit somewhere different were some of the main reasons provided.
- The Covid-19 pandemic was also the reason for not visiting during 2021 amongst around two fifths of those who had never visited the resort along with choosing to visit other destination(s) instead and/or because of the distance of the resort from their own home/too far to travel – the former and latter which are things the ERBID can really do nothing to influence.

The English Riviera Visitor Survey 2021



Introduction



Background and methodology

This report presents the findings of The English Riviera Visitor Survey 2021. 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 2021, a year when the ongoing Covid-19 pandemic and its restrictions 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 2021, 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 1,367 respondents (aged 16+ years) conducted amongst the ERBID's consumer email database during October and November 2021, 1,298 of whom had visited the resort and 715 who had done so during 2021.

The specific objectives of the 2021 research were :

- To provide information on the origin and profile of visitors to The English Riviera specifically during 2021, 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.

Sample profile

How would you describe your gender?	Count	%
Male	655	48%
Female	686	50%
I would prefer not to answer this question	20	1%
I would prefer to self describe	6	0%
Total Responses	1,367	100%
What was your age on your last birthday?	Count	%
16-24 years	2	0%
25-34 years	16	1%
35-44 years	64	5%
45-54 years	224	16%
55-64 years	424	31%
65+ years	570	42%
I would prefer not to answer this question	67	5%
Total Responses	1,367	100%
Do you have dependent children living with you in your household?	Count	%
Yes - pre school age	18	1%
Yes - school age	116	8%
Yes - no longer at school	108	8%
No	1,090	80%
I would prefer not to answer this question	63	5%
Total Responses*	1,395	100%
Multiple response question		
Do you live in the UK?	Count	%
Yes	1,330	97%
No	34	2%
I would prefer not to answer this question	3	0%
Total Responses	1,367	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)	419	31%
Employed part-time (8-29 hours per week)	93	7%
Self-employed	71	5%
Retired with company/ private pension	462	34%
Unemployed less than 6 months	1	0%
Full-time student	0	0%
Unemployed more than 6 months	28	2%
Retired with state pension only	127	9%
Working less than 8 hours week	5	0%
I would prefer not to answer this question	161	12%
Total Responses	1,367	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	1,298	95%
No	69	5%
Total Responses	1,367	
When was your LAST leisure visit to The English Riviera?	Count	%
2021	715	55%
2020	98	8%
2019	165	13%
2018	78	6%
2017	41	3%
Before 2017	178	14%
Don't know / can't recall	19	1%
Total Responses	1,294	

95% of all respondents responding to the survey (1,298) had visited The English Riviera for a leisure day out and/or stayed overnight in the resort (not in their own home). 55% of these respondents (715 respondents) had last visited the resort during 2021.

Sample profile

For the purposes of the research and analysis, in the pages to follow the 2021 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 2021 – a total of 84 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 2021 – a total of 631 respondents – 88% of the total sample.
- **First time visitors** – 2021 visitors to the resort who had never visited The English Riviera – a total of 79 respondents – 11% of the total sample. *Caution should be taken when interpreting the results for these respondents due to the small sample size.*
- **Repeat visitors** – 2021 visitors to the resort who had visited the resort on a previous occasion – a total of 636 respondents – 89% of the total sample.

Unless otherwise stated, the results to follow in this report refer to current 2021 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 (560 respondents who had last visited the resort prior to 2021 and 69 respondents who had never visited) are provided in a separate chapter towards the end of the report (pages 83-86).

The English Riviera Visitor Survey 2021



Visitor Profile*



**Those visiting during 2021 only (715 respondents)*

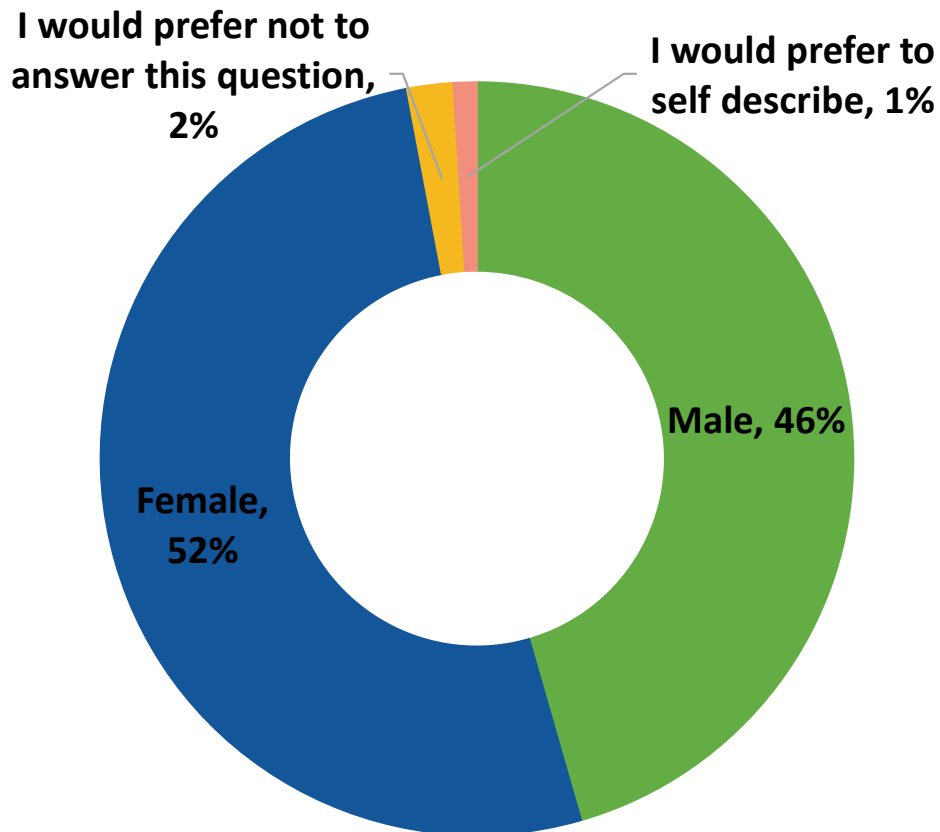


52% were female, 46% were male.
78% had no dependent children living with them at home.

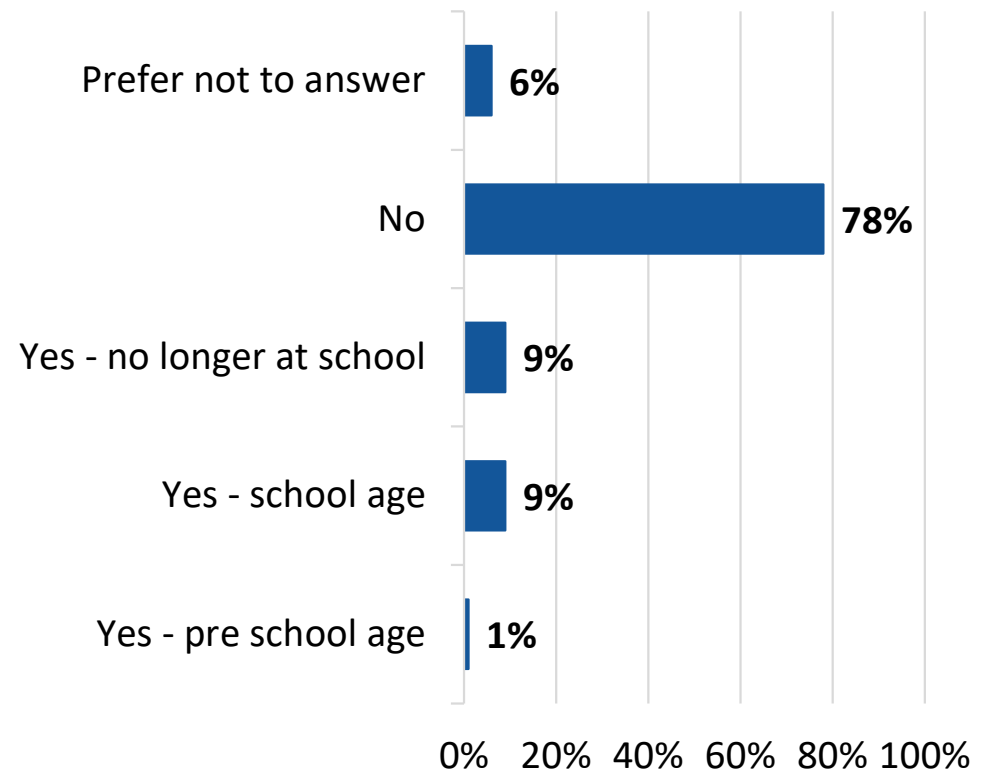
52% of all survey respondents who had visited The English Riviera during 2021 were female and 46% were male.

78% had no dependent children living with them in their household.

How would you describe your gender?



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



(N = 715)

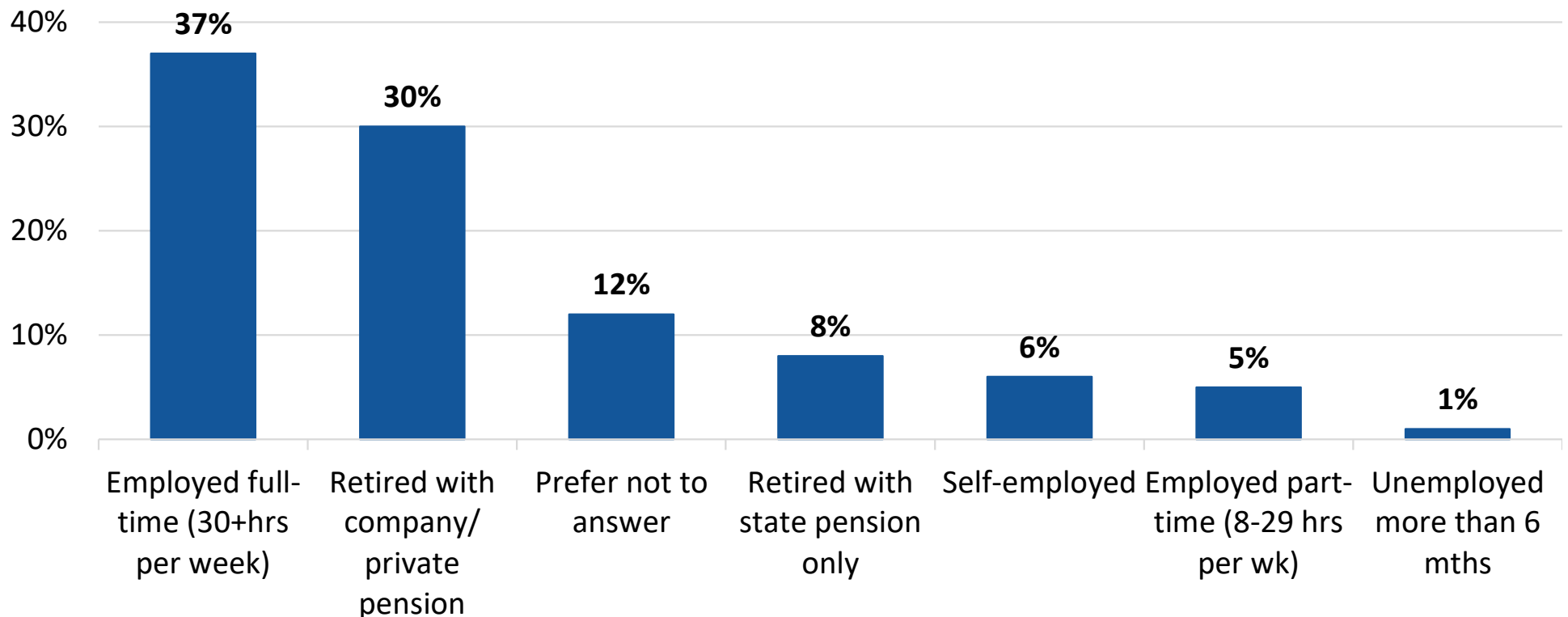
(N = 715)

42% were in full-time or part-time employment, 38% were retired.

37% of all survey respondents who had visited The English Riviera during 2021 were employed full-time (30+ hours per week) and 5% worked part-time (8-29 hours per week). 30% were retired with a company/private pension and 8% with a state pension only. 6% were self-employed, and 1% had been unemployed for over 6 months.

12% preferred not to answer the question.

Which of the following categories applies to the chief income earner in your household?

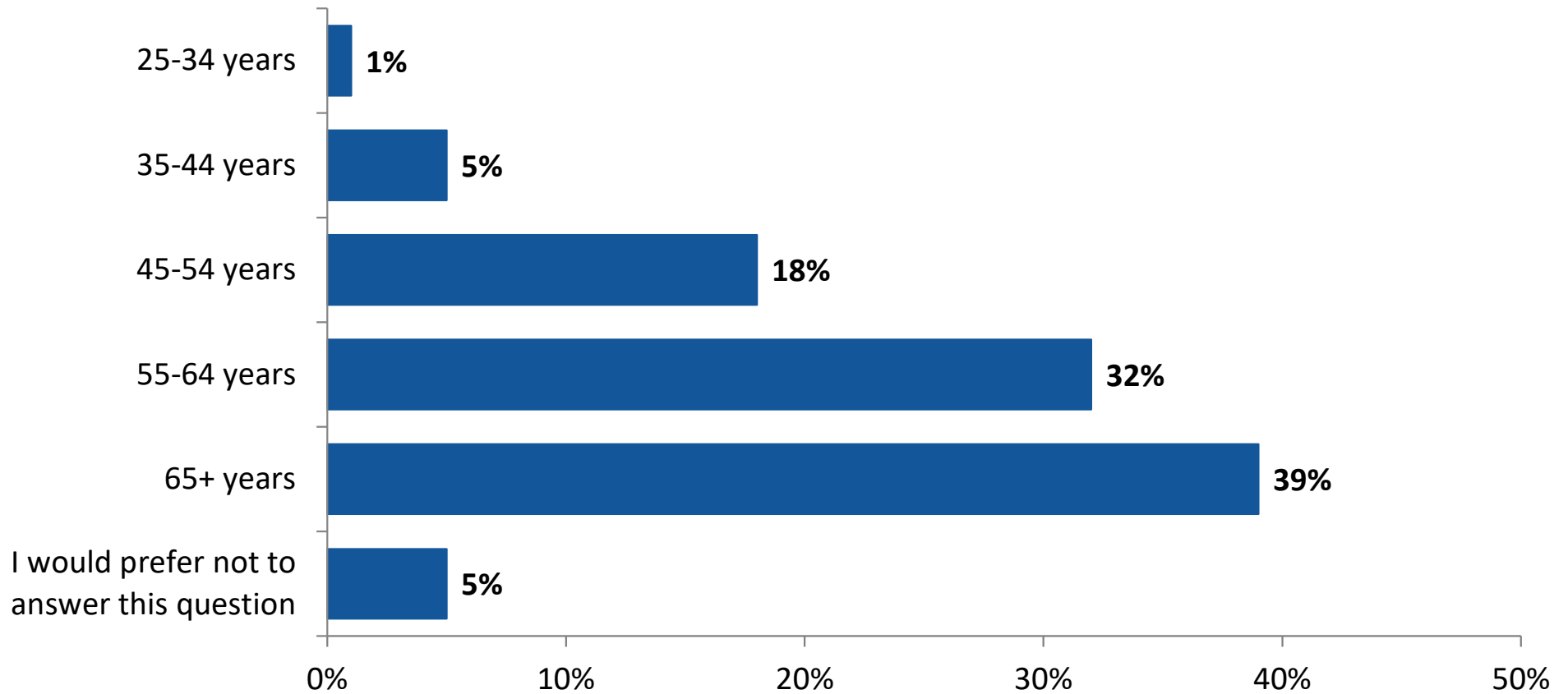


71% were aged 55 years or over.

39% of all survey respondents who had visited the resort during 2021 were aged 65+ years and 32% were aged 55-64 years. 24% were aged 54 years or under including 18% aged 45-54 years, 5% 35-44 years and 1% aged 25-34 years.

5% preferred not to answer the question.

What was your age on your last birthday?



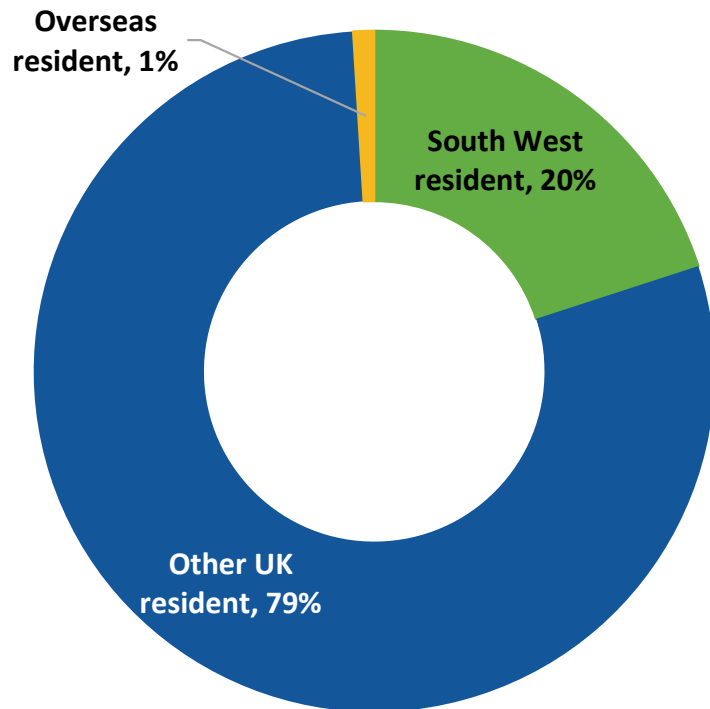
20% lived in the South West region.

99% of all 2021 visitors to The English Riviera were UK residents. 20% of these lived in the South West region including approximately 4% in each case who lived in the Bristol 'BS' or Gloucester 'GL' postcode areas.

79% of 2021 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 lived in Derby and 3% in the Dudley 'DY' or Sheffield 'S' postcode areas. The table below shows the postcode areas where 2% or more of 2021 respondents came from.

1% of all visitors were from overseas (6 respondents).

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



Postal area origin		% of 2021 visitors
B	Birmingham	6.30%
GL	Gloucester	3.95%
BS	Bristol	3.81%
DE	Derby	3.51%
DY	Dudley	3.07%
S	Sheffield	2.93%
RG	Reading	2.49%
ST	Stoke-On-Trent	2.49%
CV	Coventry	2.34%
NP	Newport	2.34%
TQ	Torquay	2.34%
LE	Leicester	2.20%
NG	Nottingham	2.20%

(N = 681)

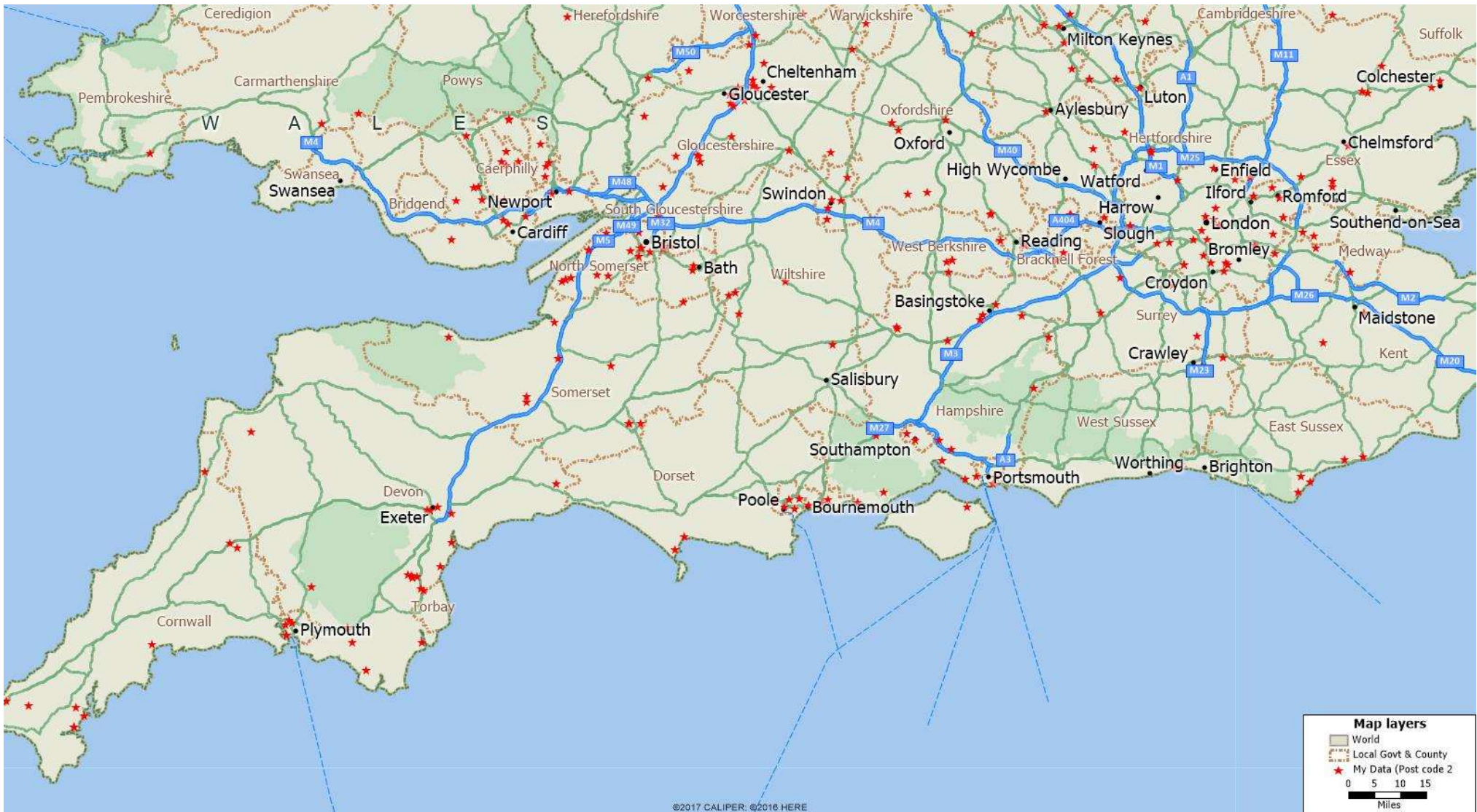
Map showing home postcode locations of visitors to The English Riviera.

The map below shows the home postcode locations of visitors to The English Riviera during 2021



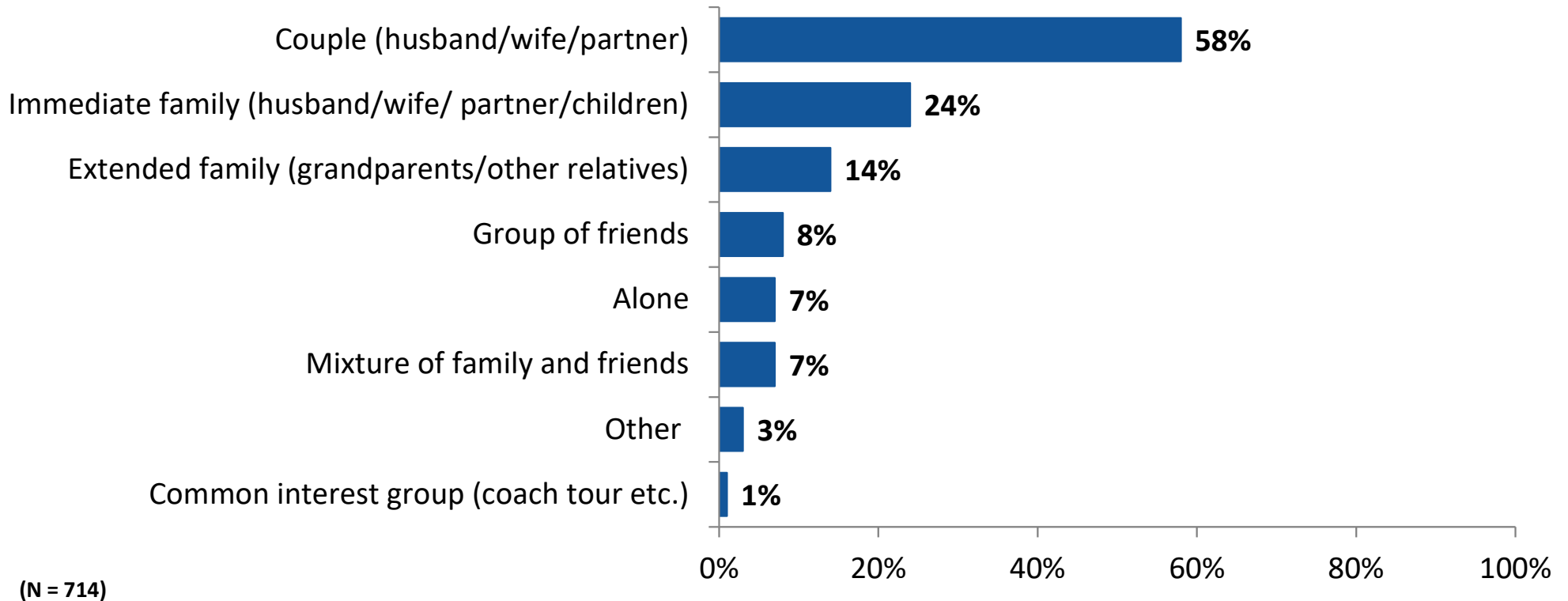
Map showing home postcode locations of visitors to The English Riviera.

Southern regions home postcodes zoom map



Couples and immediate family groups made up the large majority of visitors to the resort.

Who did you visit The English Riviera with?



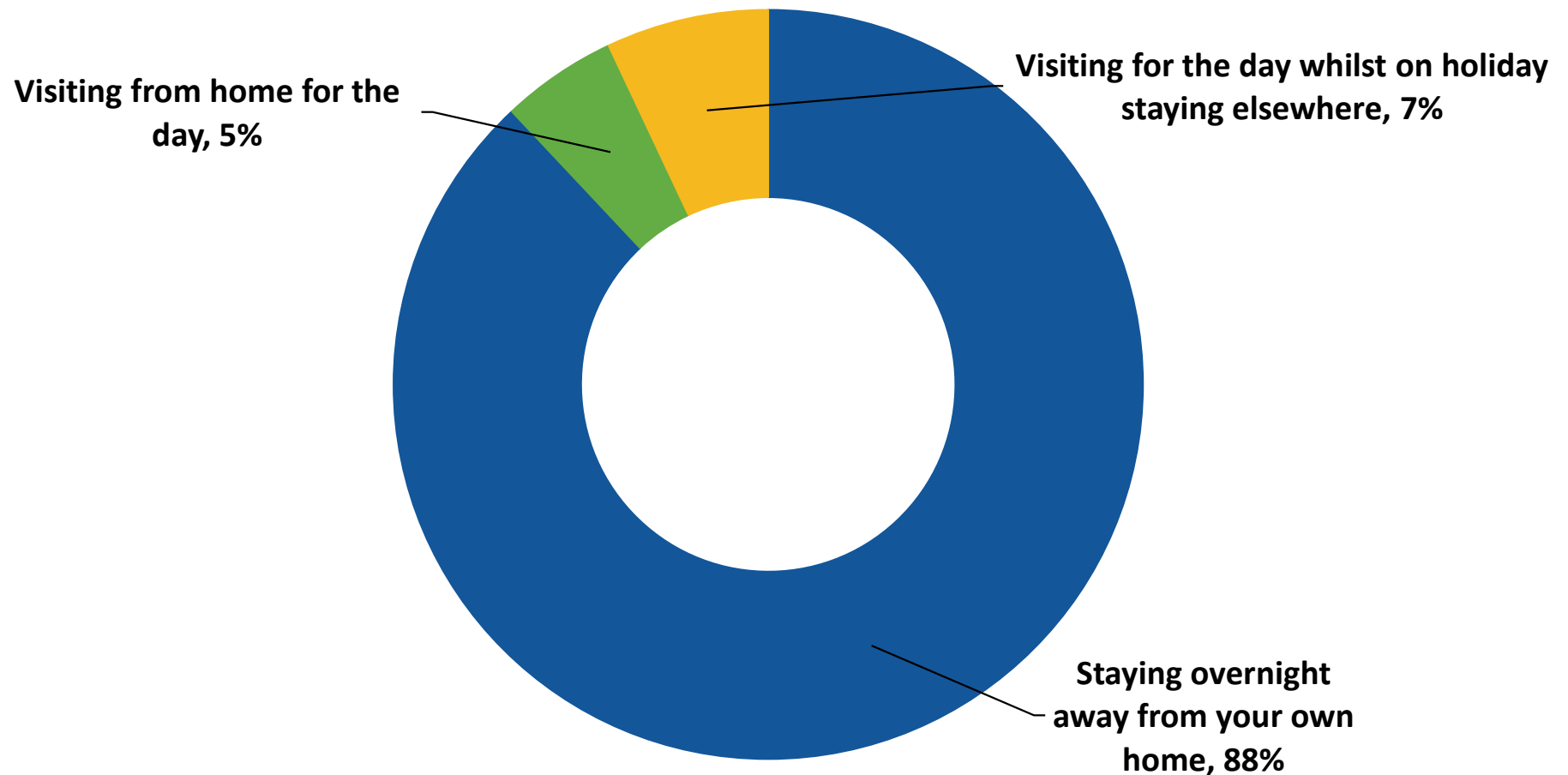
58% had visited The English Riviera in a couple (husband/wife/partner) whilst 24% had done so as part of an immediate family group (husband/wife/partner/children). 14% had visited as part of an extended family group (grandparents/other relatives), 8% as part of a group of friends and 7% as part of a mixed group of family and friends.

7% had visited the resort alone, 1% as part of a common interest group and 3% in another group type.

88% were staying overnight in the resort.

The average duration of stay was 7.09 nights.

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



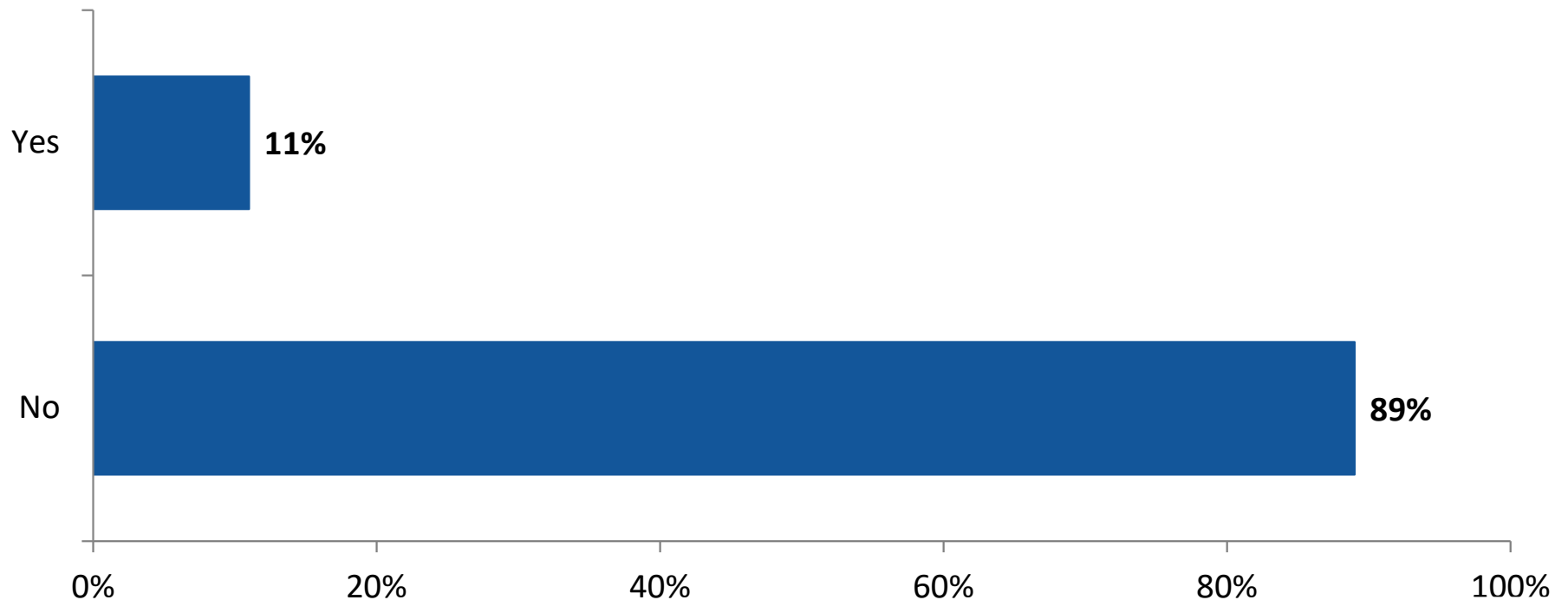
(N = 715)

89% were repeat visitors.

89% of all 2021 visitors were on a repeat visit to The English Riviera and 11% were first time visitors to the resort.

There may have been more visitors experiencing the resort for the first time during 2021 but they would only have been captured by this survey if they had requested/registered for information about visiting The English Riviera. It was initially anticipated that the survey link would have also been distributed amongst local businesses to promote participation amongst their customers/guests/databases, which may have captured more first time visitors to the resort, but in the end this was not possible.

Was this your first leisure visit to The English Riviera?



The English Riviera Visitor Survey 2021



Characteristics of Visits*



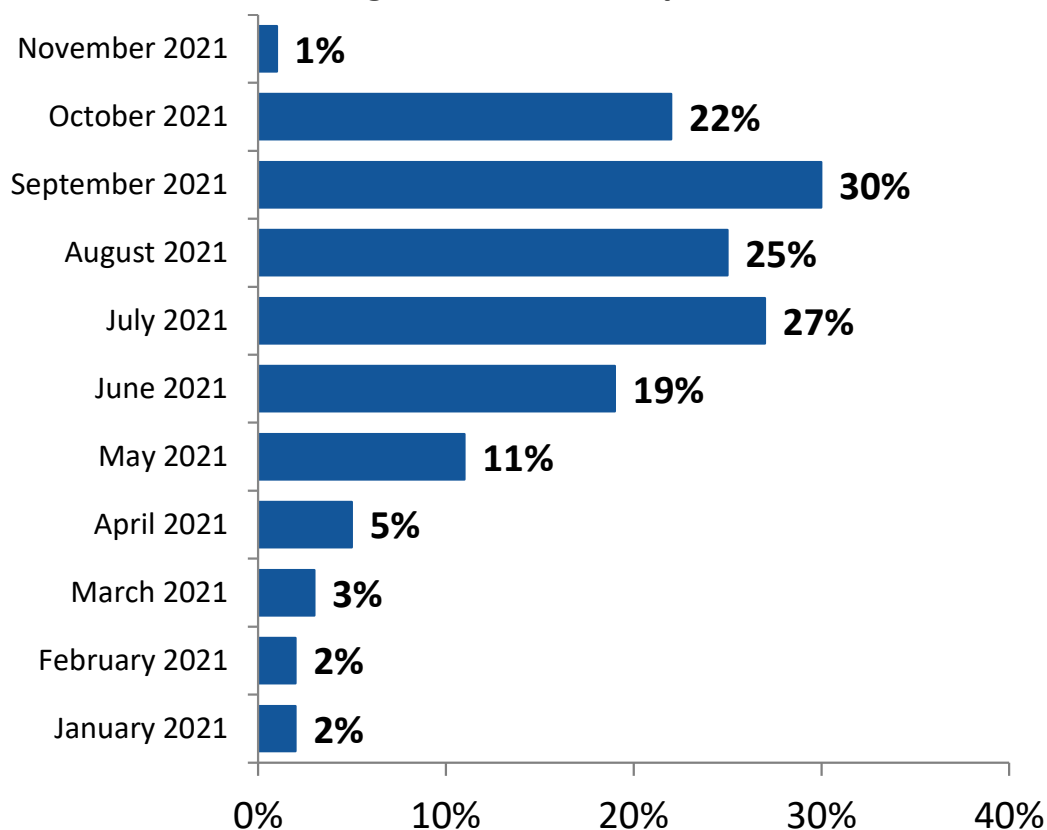
**Those visiting during 2021 only (715 respondents)*



30% of 2021 visits took place during September, 27% during July and 25% during August.

However, the timing of visits to the resort during the year will have been heavily influenced by the lockdowns which were in place due to Covid-19 and the lifting of these restrictions across the year.

During which month(s) of 2021 did your visit to The English Riviera take place?



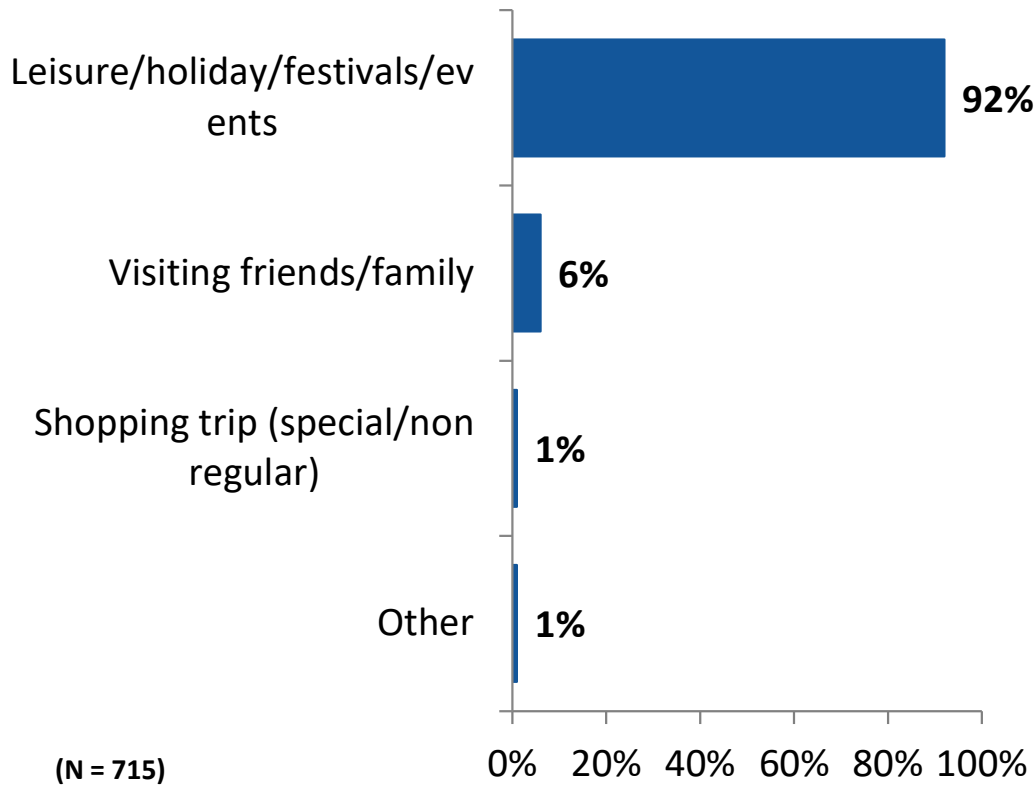
(N = 714)

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 2021	Day visitors	Staying visitors	First time	Repeat visitors
Jan	7%	1%	-	2%
Feb	8%	1%	-	2%
Mar	10%	2%	1%	3%
Apr	14%	4%	-	6%
May	17%	10%	1%	12%
Jun	25%	18%	10%	20%
Jul	27%	27%	27%	27%
Aug	29%	25%	19%	26%
Sep	44%	28%	30%	30%
Oct	25%	21%	15%	22%
Nov	5%	1%	0%	2%

92% of visitors were on a leisure/holiday related trip.

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



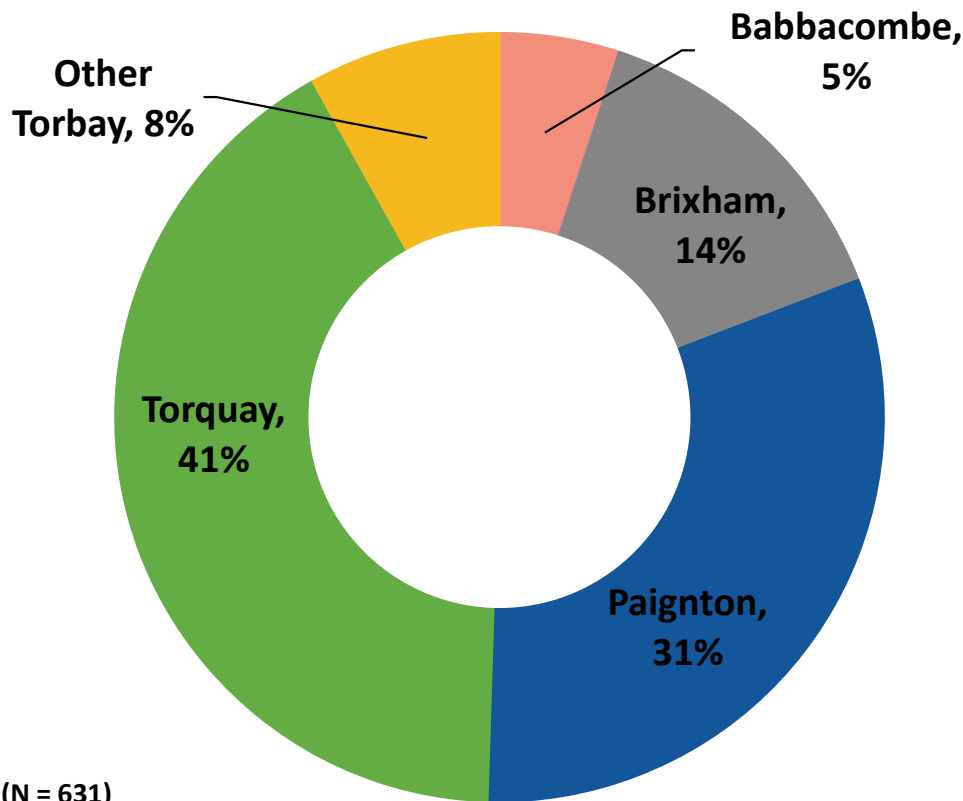
Main purpose of visit	Day visitors	Staying visitors	First time	Repeat visitors
Leisure/holiday/festivals/events	80%	94%	100%	91%
Visiting friends/family	8%	5%	-	6%
Shopping trip (special/non regular)	7%	-	-	1%
Business/conference	1%	-	-	-
Other	4%	1%	-	1%

92% had visited The English Riviera as part of a leisure/holiday related trip with this proportion increasing to 100% for those on their first visit to the resort. 6% were visiting friends or relatives (8% of day visitors and 6% of repeat visitors).

1% in each case had visited the resort as part of a special shopping trip or for another reason including house hunting (7% and 4% of day visitors respectively).

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

Where did you stay on The English Riviera?



Location of staying visit	First time	Repeat visitors
Babbacombe	6%	5%
Brixham	14%	14%
Paignton	17%	33%
Torquay	61%	38%
Other Torbay	3%	9%

41% of staying visitors had stayed in accommodation in Torquay and 31% in Paignton. 14% stayed in Brixham and 5% 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 staying visitors to the resort (61%).

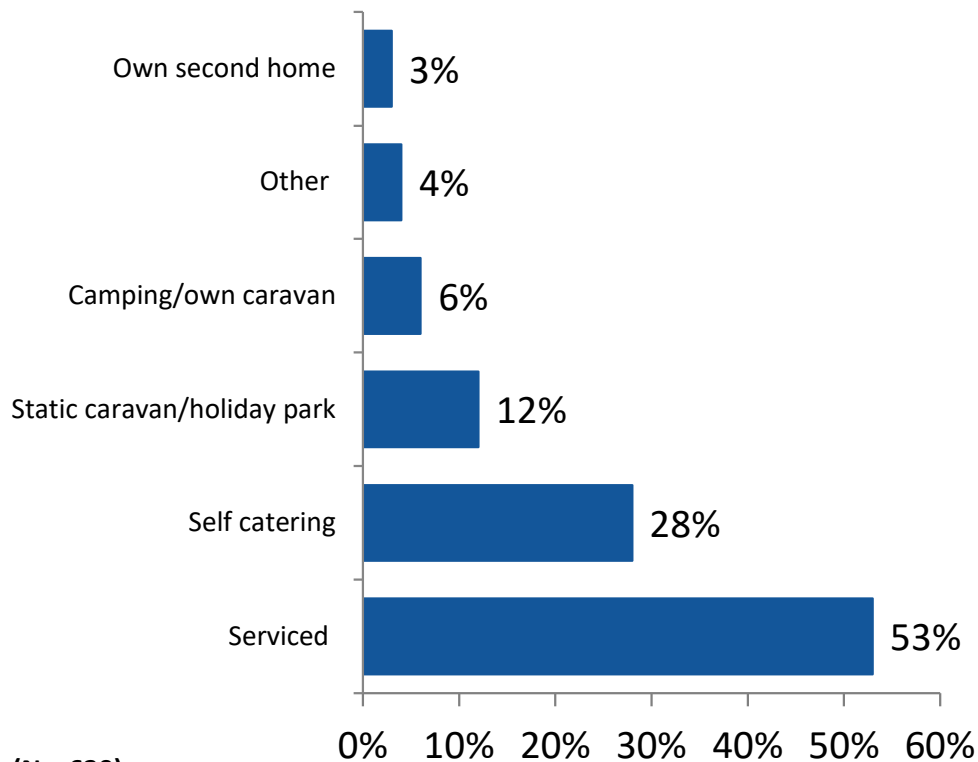
Serviced accommodation was the most popular.

53% of staying visitors had used serviced accommodation in the resort including a hotel, B&B or guest house whilst 28% had used self catering accommodation.

12% had stayed in a static caravan/holiday park and 6% had camped/used their own caravan. 3% had stayed in their own second home on The English Riviera and 4% had used another type of accommodation including staying at a friends or relatives house or in a motorhome.

First time visitors to the resort were more likely to use serviced accommodation (63%) and less likely to use camping (4%) or static caravans (7%) than those on a repeat visit to the resort (52%, 7% and 13% respectively).

What type of accommodation did you use?



(N = 630)

Accommodation used	First time	Repeat visitors
Serviced (Hotel/B&B/Guest House)	63%	52%
Self catering	28%	28%
Own second home	-	3%
Camping/own caravan	4%	7%
Static caravan/holiday park	7%	13%
Other	-	4%

The English Riviera Visitor Survey 2021



Information Sourcing & Booking Patterns



**Those visiting during 2021 only (715 respondents)*

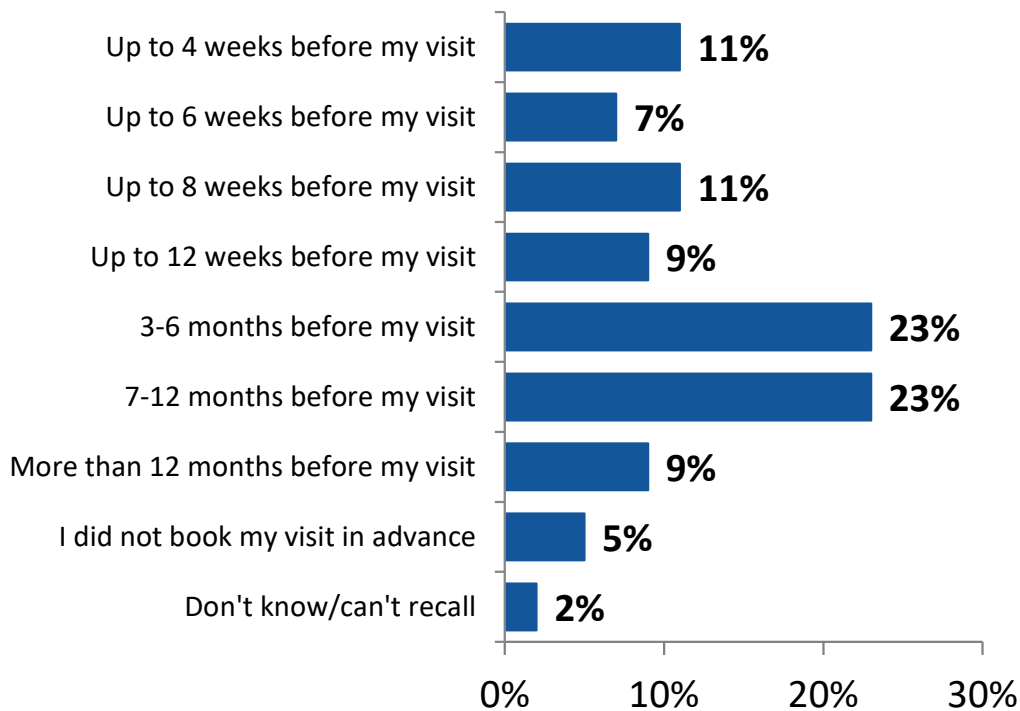


55% of accommodation was booked more than 12 weeks in advance.

55% of staying visitors had booked their accommodation more than 12 weeks in advance of their visit including 23% in each case either 3-6 months or 7-12 months in advance of their visit and 9% more than 12 months prior to their visit. 38% booked up to 12 weeks in advance of their visit.

Whilst the largest proportion of first time visitors to the resort booked more than 12 weeks in advance of their visit (49%) this was slightly lower than the proportion of repeat visitors who had done the same (56%). 47% of those experiencing the resort for the first time booked up to 12 weeks in advance of their visit (including 22% up to 8 weeks prior), compared with 38% of repeat visitors.

How far in advance did you book your accommodation?

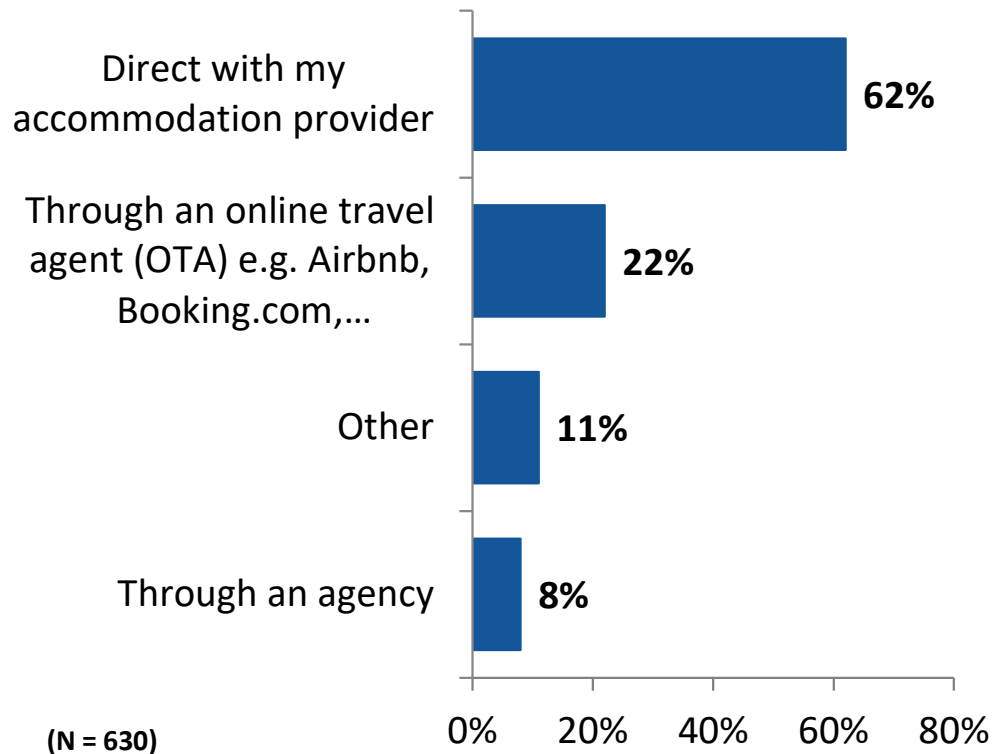


(N = 631)

How far in advance booked accommodation	First time	Repeat visitors
Up to 4 weeks before my visit	7%	12%
Up to 6 weeks before my visit	10%	7%
Up to 8 weeks before my visit	22%	10%
Up to 12 weeks before my visit	8%	9%
3-6 months before my visit	24%	23%
7-12 months before my visit	22%	23%
More than 12 months before my visit	3%	10%
I did not book my visit in advance	1%	6%
Don't know/can't recall	3%	2%

Almost two thirds of staying visitors booked direct with their accommodation provider.

How did you book your accommodation?



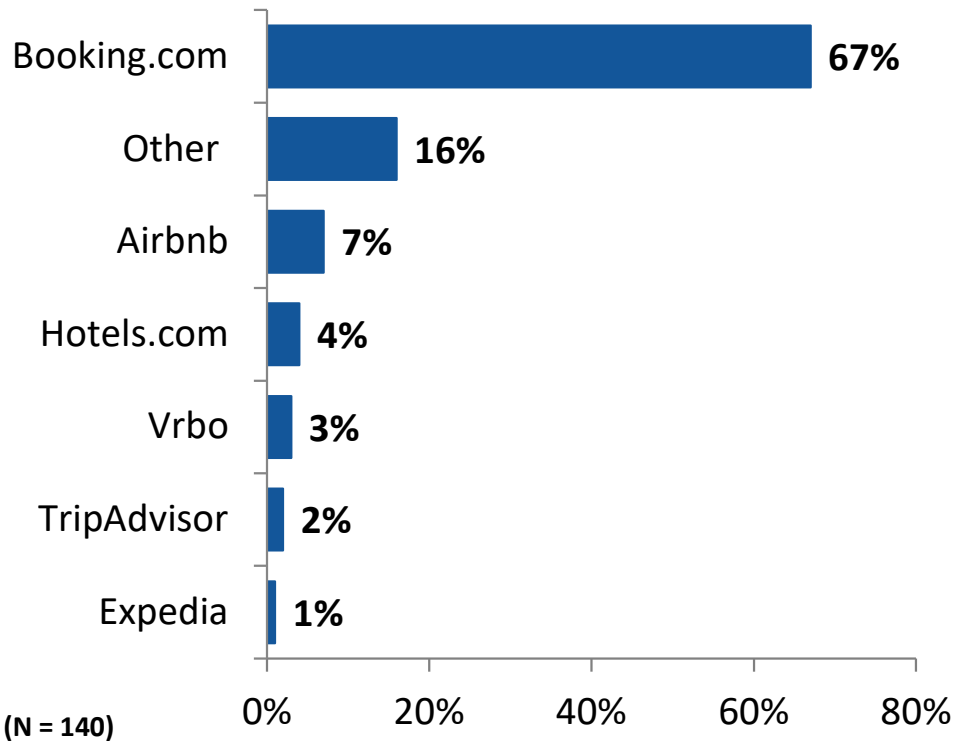
How booked accommodation	First time	Repeat visitors
Direct with my accommodation provider	38%	65%
Through an online travel agent (OTA) e.g. Airbnb, Booking.com, LateRooms.com, Expedia.co.uk etc.	35%	21%
Through an agency	17%	7%
Other	14%	10%

62% of staying visitors booked directly with their accommodation provider, 22% booked through an online travel agent (OTA) and 8% through an agency. 11% 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 (65%) compared with 38% of those on their first visit to the resort. 35% of those experiencing The English Riviera for the first time had booked through an online travel agent (21% of repeat visitors) and 17% through an agency (7% of repeat visitors).

67% of those using an OTA had used Booking.com.

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



OTA used	First time	Repeat visitors
Airbnb	8%	7%
Booking.com	56%	69%
LateRooms.com	-	-
Expedia	4%	1%
TripAdvisor	-	3%
Hotels.com	8%	3%
Vrbo	-	3%
Other	24%	14%

67% of those using an OTA to book their accommodation had used Booking.com and 7% Airbnb.

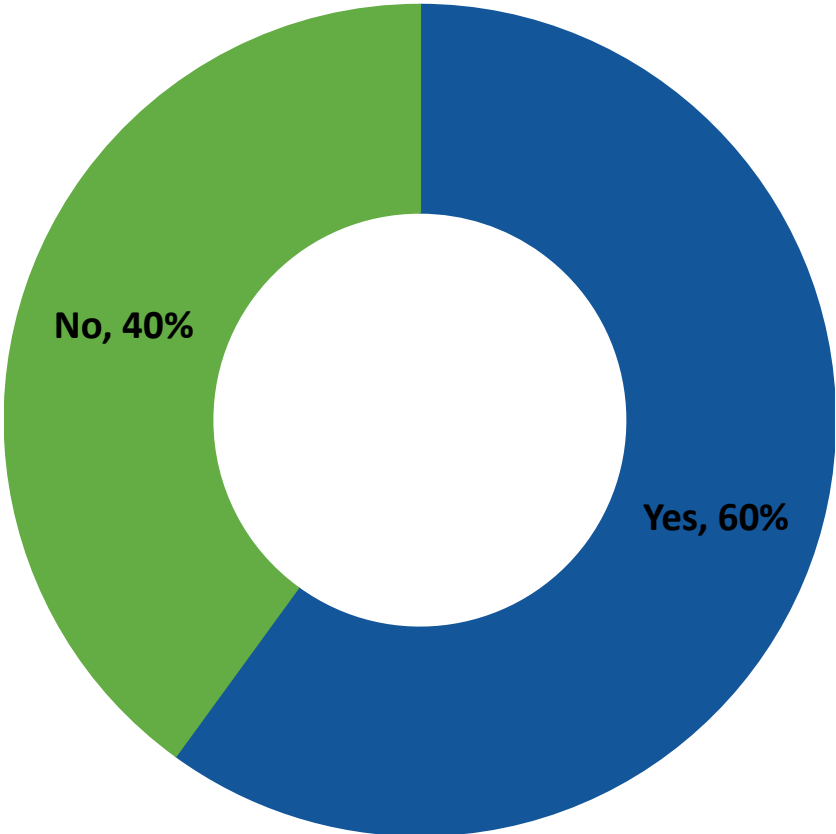
4% had used Hotels.com, 3% Vrbo, 2% TripAdvisor and 1% had used Expedia. 16% had used another OTA including Cottages.com and Hoseasons.

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

60% of visitors had sourced information about The English Riviera.

60% of visitors had sourced information about The English Riviera to assist them either before or during their visit. This proportion increased to 90% of those on their first visit to the resort.

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



(N = 715)

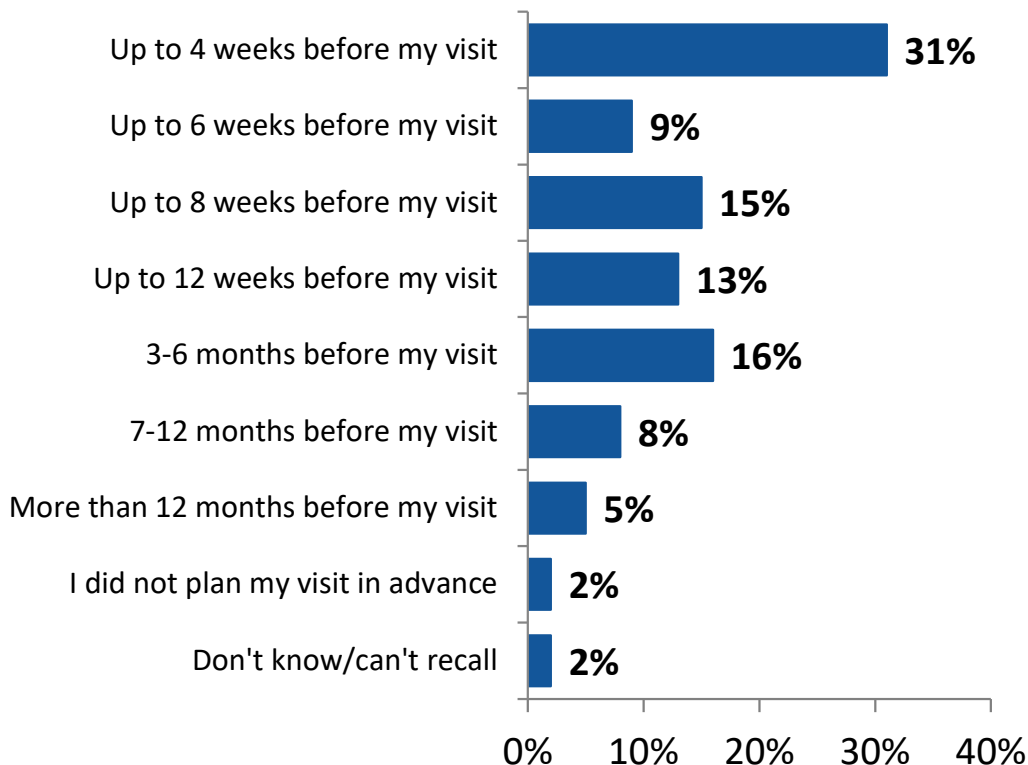
Whether sourced information before or during visit	Day visitors	Staying visitors	First time	Repeat visitors
Yes	50%	61%	90%	56%
No	50%	39%	10%	44%

68% sourced their visit information up to 12 weeks in advance.

68% 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 31% up to 4 weeks prior to their visit. 29% sourced their information more than 12 weeks before their visit.

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

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

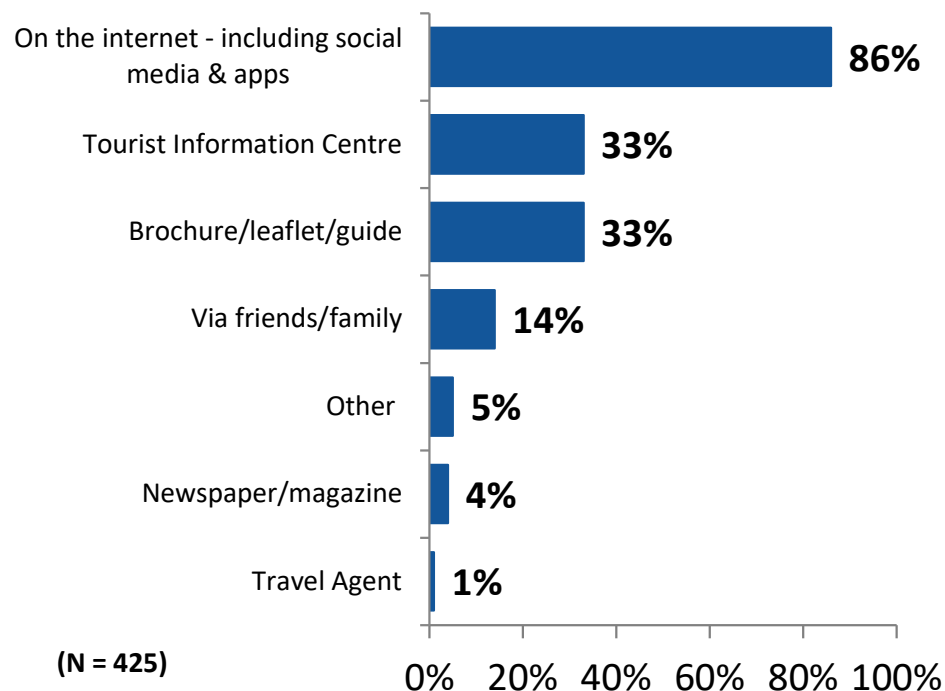


(N = 427)

How far in advance sourced visit information	Day visitors	Staying visitors	First time	Repeat visitors
Up to 4 weeks before my visit	26%	32%	31%	31%
Up to 6 weeks before my visit	12%	9%	7%	10%
Up to 8 weeks before my visit	12%	15%	20%	13%
Up to 12 weeks before my visit	17%	12%	17%	12%
3-6 months before my visit	12%	16%	17%	16%
7-12 months before my visit	12%	7%	7%	8%
More than 12 months before my visit	2%	5%	1%	6%
I did not book my visit in advance	5%	1%	-	2%
Don't know/can't recall	2%	2%	-	3%

The internet was the most popular place to source information.

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



Where obtained information	Day visitors	Staying visitors	First time	Repeat visitors
Via friends/family	24%	13%	13%	14%
On the internet - including social media & apps	90%	85%	92%	84%
Newspaper/magazine	12%	4%	1%	5%
Travel Agent	2%	1%	1%	1%
Tourist Information Centre	31%	33%	34%	33%
Brochure/leaflet/guide	33%	33%	30%	34%
I don't know/can't remember	-	1%	-	1%
Other	2%	5%	3%	6%

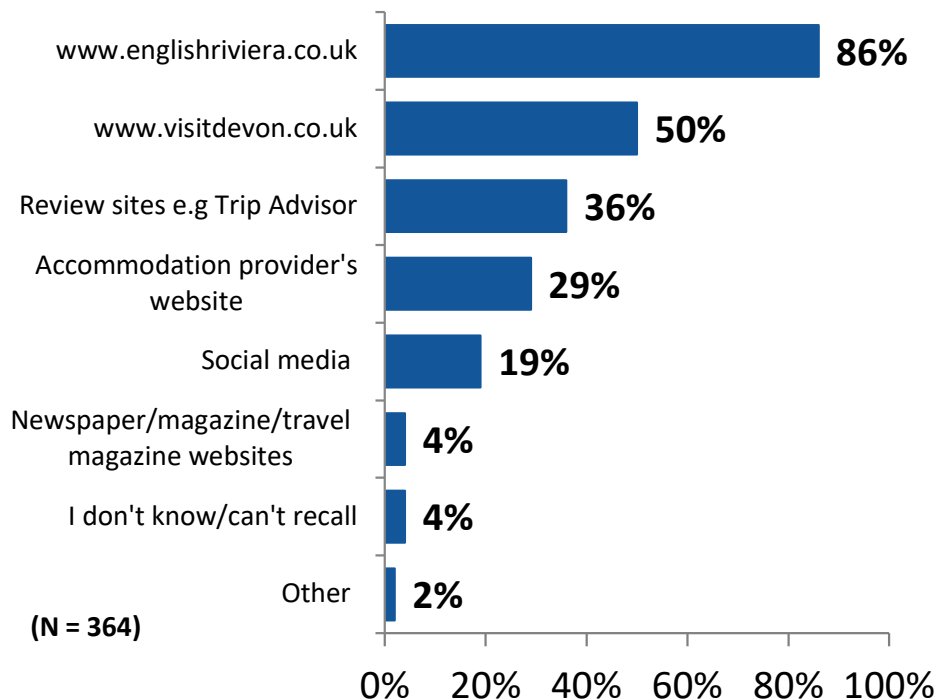
86% of visitors who had sourced information about The English Riviera to assist them either before or during their visit had done so on the internet (including social media and apps).

33% in each case had used a tourist information centre and/or a brochure/leaflet/guide to source their information (the majority mentioning The English Riviera Official Guide). 14% sourced their information from friends and family, 4% from a newspaper/magazine and 1% from a travel agent. 5% used another source including the majority who said they have visited before and had previous knowledge of the area.

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

86% 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?



Websites used	Day visitors	Staying visitors	First time	Repeat visitors
www.englishriviera.co.uk	76%	87%	80%	87%
www.visitdevon.co.uk	66%	48%	46%	51%
Accommodation provider's website	18%	30%	38%	26%
Social media e.g. Facebook/Twitter/Instagram	18%	19%	17%	19%
Review sites e.g. Trip Advisor	34%	36%	55%	32%
Newspaper/magazine/travel magazine websites e.g. Sunday Times/Lonely Planet	16%	2%	8%	3%
I don't know/can't recall	3%	5%	8%	4%
Other	5%	2%	2%	2%

86% of visitors who had sourced information about visiting The English Riviera on the internet had used the www.englishriviera.co.uk website and 50% the www.visitdevon.co.uk website. 36% used review websites such as TripAdvisor and 29% their accommodation providers' website. 19% used a social media site such as Facebook/Twitter/Instagram.

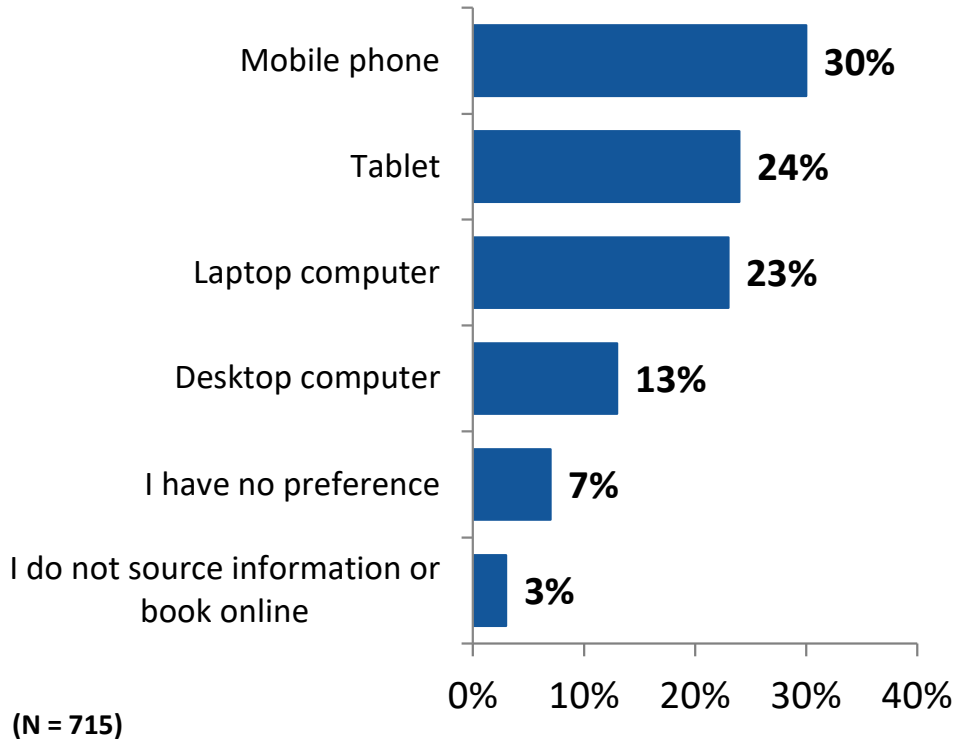
Day visitors were more likely to have used the www.visitdevon.co.uk website (66%) when searching for information on the internet about visiting the resort and first time visitors were more likely to use review sites such as TripAdvisor (55%).

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. 24% preferred to use a tablet, 23% a laptop computer and 13% a desktop computer. 7% had no preference and 3% said they did not source information or book online.

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

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



Preferred electronic device to source and book	Day visitors	Staying visitors	First time	Repeat visitors
Laptop computer	27%	23%	27%	23%
Desktop computer	19%	12%	11%	13%
Mobile phone	26%	30%	29%	30%
Tablet	21%	25%	20%	25%
I have no preference	6%	7%	10%	7%
I do not source information or book online	-	3%	3%	3%

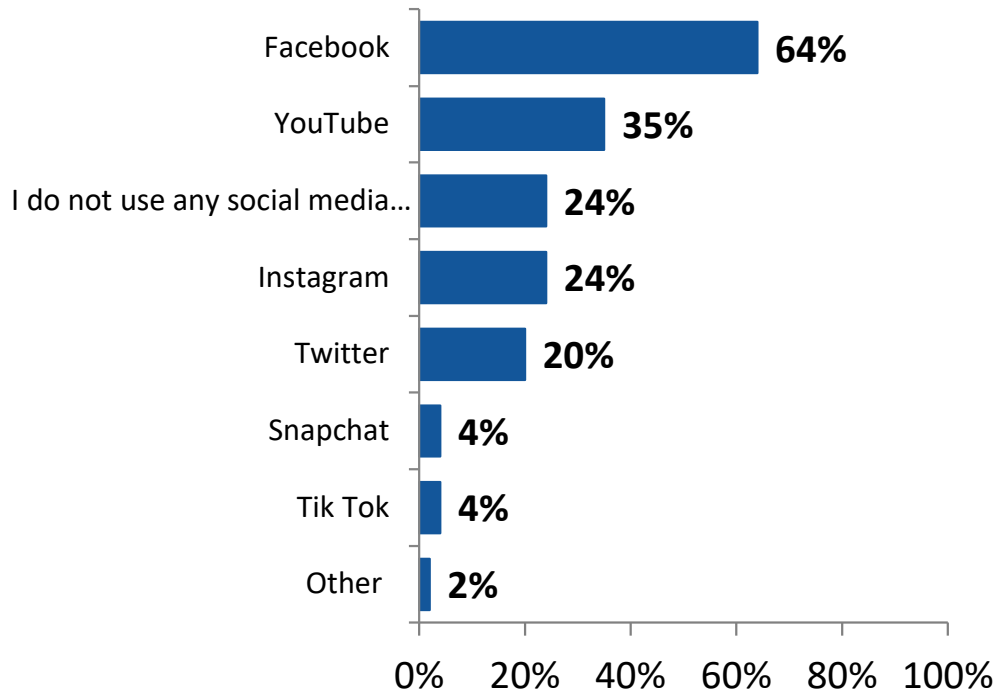
Almost two thirds of visitors used Facebook.

64% of visitors used Facebook, 35% YouTube, 24% Instagram and 20% Twitter, 4% in each case used Snapchat and Tik Tok and 2% another social media channel including WhatsApp and LinkedIn.

Around a quarter of visitors (24%) said they did not use social media channels.

On the whole, day visitors and first time visitors to the resort were more likely to use Facebook, Instagram and Twitter than staying visitors and those on a repeat visit to the resort.

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



(N = 714)

Social media channels used	Day visitors	Staying visitors	First time	Repeat visitors
Facebook	70%	63%	66%	63%
Instagram	27%	23%	39%	22%
Twitter	25%	19%	29%	19%
Snapchat	2%	4%	5%	3%
Tik Tok	5%	4%	6%	4%
You Tube	36%	35%	34%	35%
I do not use any social media channels	19%	24%	19%	24%
Other	2%	2%	4%	1%

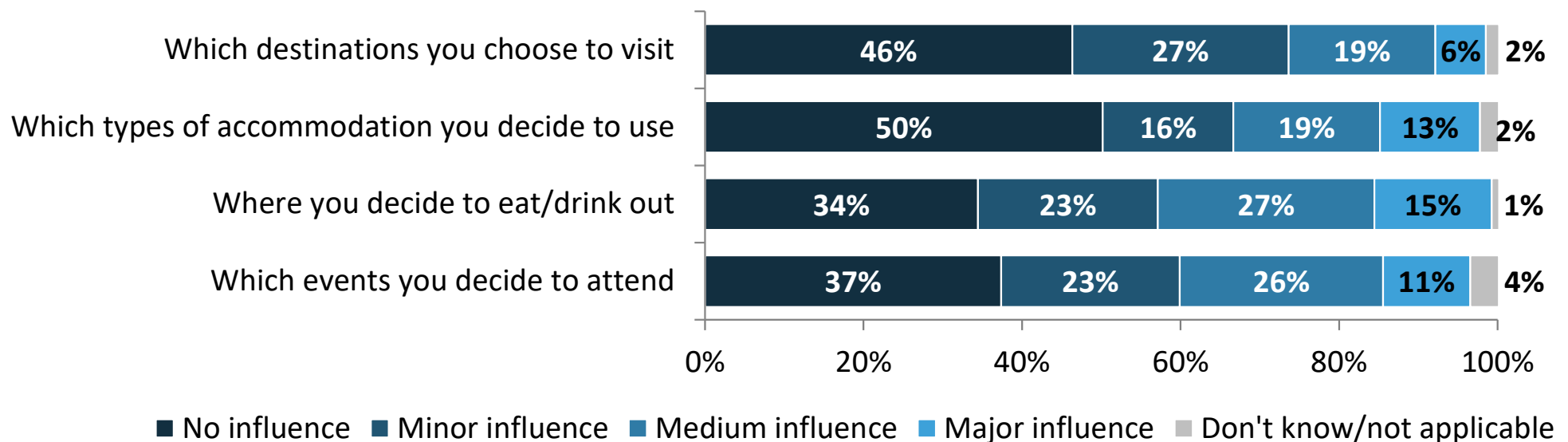
Social media channels were considered most influential on where visitors decided to eat/drink out and which events they decided to attend.

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 (34-50%).

65% of visitors said the social media channels they used had some level of influence on them when deciding where to eat & drink, 60% when deciding which events to attend, 52% when choosing which destinations to visit and 48% when deciding which types of accommodation to use.

The results by visitors type and first time/staying visitors are shown overleaf.

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



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	41%	24%	25%	10%	-	47%	28%	18%	6%	2%
Which types of accommodation you decide to use	35%	13%	28%	18%	6%	52%	17%	17%	12%	2%
Where you decide to eat/drink out	26%	25%	28%	21%	-	35%	22%	27%	14%	1%
Which events you decide to attend	21%	22%	37%	16%	4%	40%	23%	24%	10%	4%

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	31%	36%	25%	6%	2%	48%	26%	18%	6%	2%
Which types of accommodation you decide to use	42%	19%	22%	16%	2%	51%	16%	18%	12%	2%
Where you decide to eat/drink out	28%	27%	28%	16%	2%	35%	22%	27%	15%	1%
Which events you decide to attend	36%	16%	30%	11%	8%	37%	23%	25%	11%	3%

The English Riviera Visitor Survey 2021



Activity Taking



**Those visiting during 2021 only (715 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 (95% took part including 13% for whom it was their main reason for visiting), visiting local attractions/places of interest (90% took part including 27% for whom it was their main reason for visiting), visiting the beach/sea (84% took part including 23% for whom it was their main reason for visiting) and shopping (74% took part including 7% for whom it was their main reason for visiting).

67% had taken part in walking/nature-based activities (including 16% for whom it was their main reason for visiting), 55% in history/heritage-based activities (11% for whom it was their main reason for visiting) and 40% had visited bars/nightclubs (5% for whom it was their main reason for visiting). 28% had attended local events (5% for whom it was their main reason for visiting) and 26% 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 (5% for whom it was their main reason for visiting) and 8% had taken part in outdoor sports/pursuits (1% for whom it was their main reason for visiting).

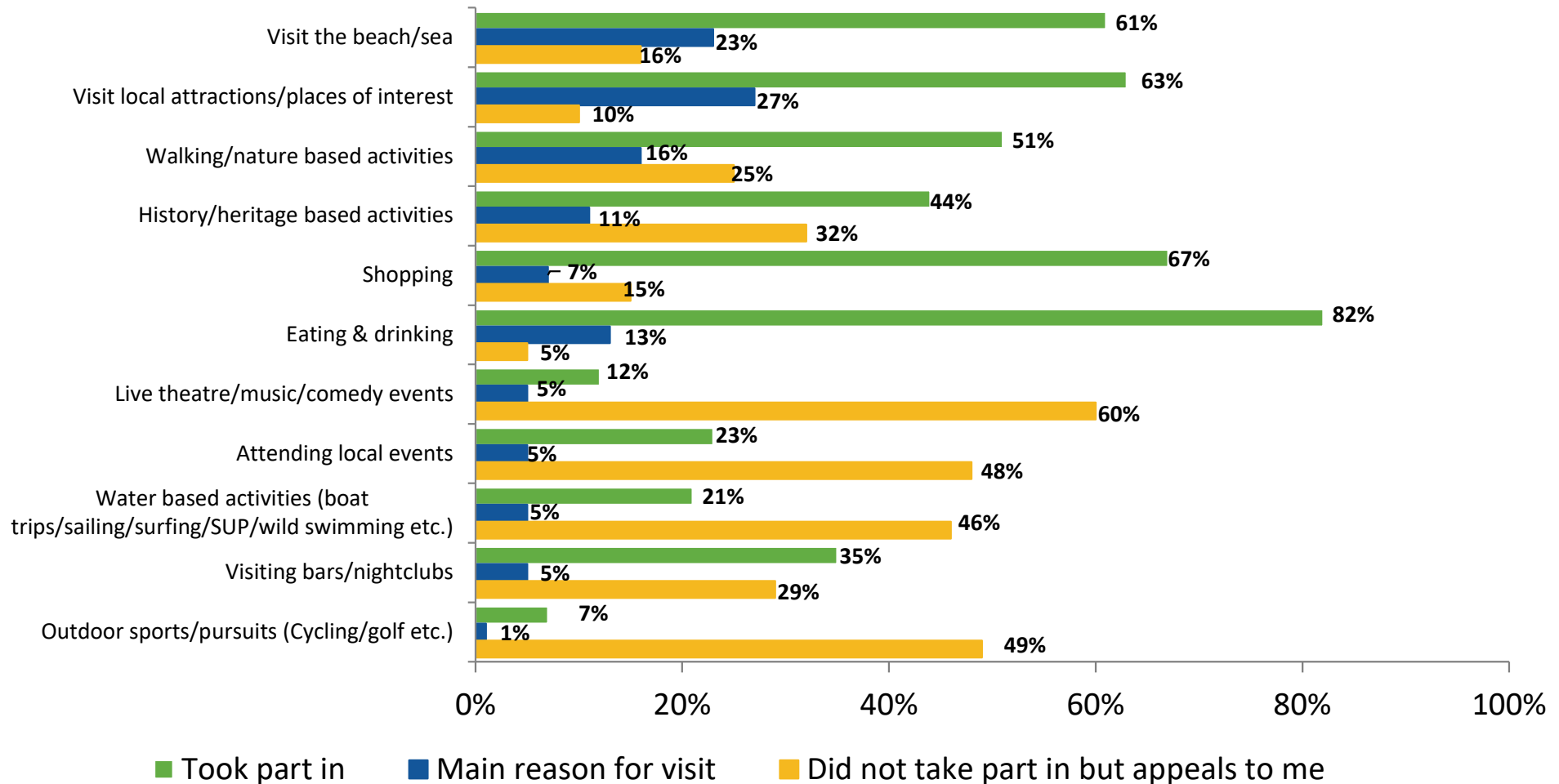
In terms of activities/experiences which visitors hadn't taken part in during their visit to The English Riviera, but which appealed to them, live theatre/music/comedy events was most appealing (60%), followed by outdoor sports/pursuits (49%), attending local events (48%) and/or taking part in water-based activities (46%).

History/heritage-based activities appealed to 32% 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 25% for walking/nature-based activities. 16% who hadn't visited the beach/sea during their visit to the resort said it was appealing to them as an activity as did 15% about going shopping, 10% for visiting local attractions/places of interest and 5% about eating & drinking.

Visiting local attractions/places of interest and visiting the beach/sea was the main reason for visit for 27% and 23% of visitors respectively.

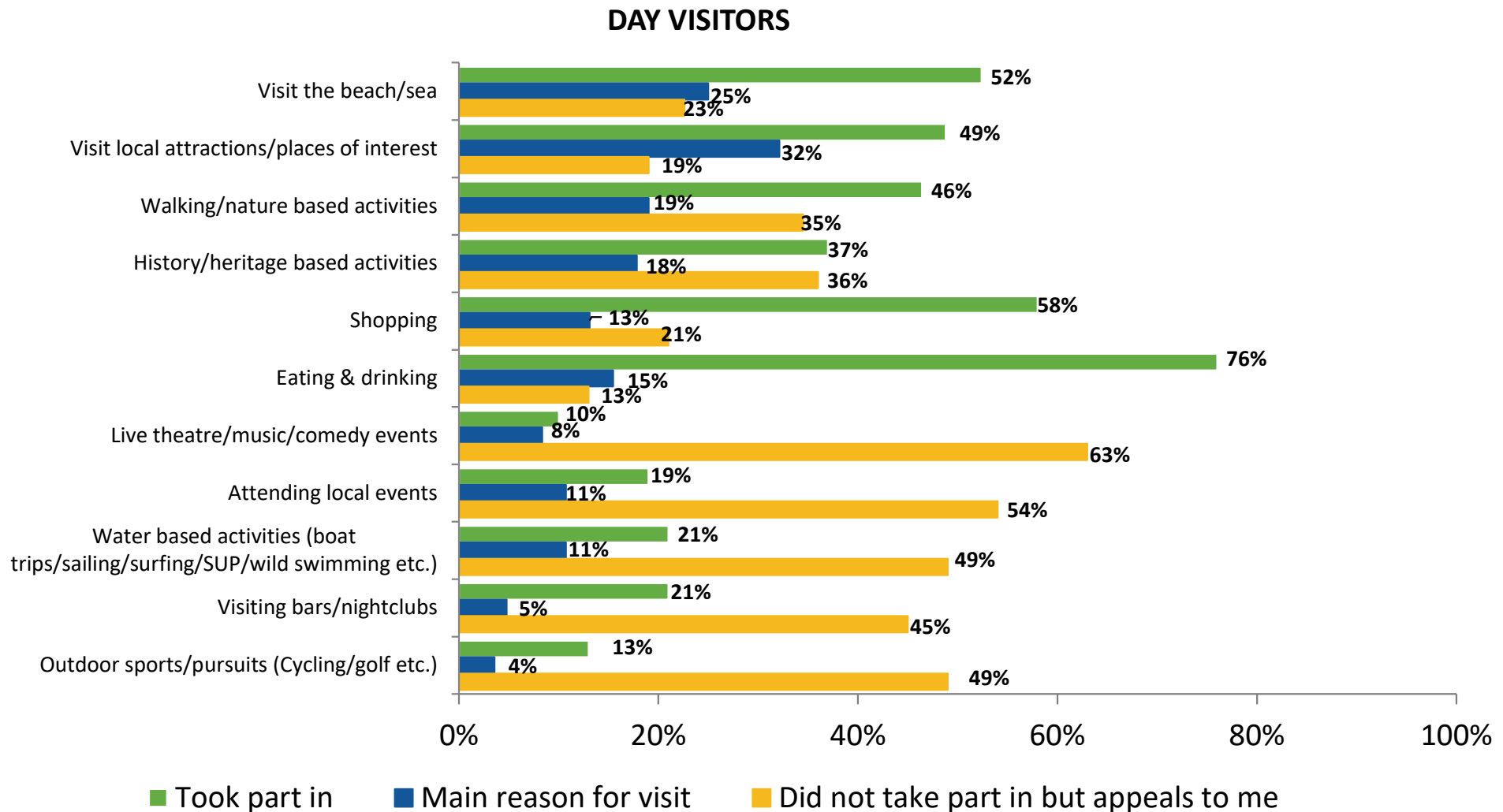
Please select from the list below which activities/experiences you took part in when you LAST visited The English Riviera and if any of these were the main reason for your visit. If you didn't take part in any of the activities /experiences listed please tell us if they are things which appeal to you.

ALL 2021 VISITORS



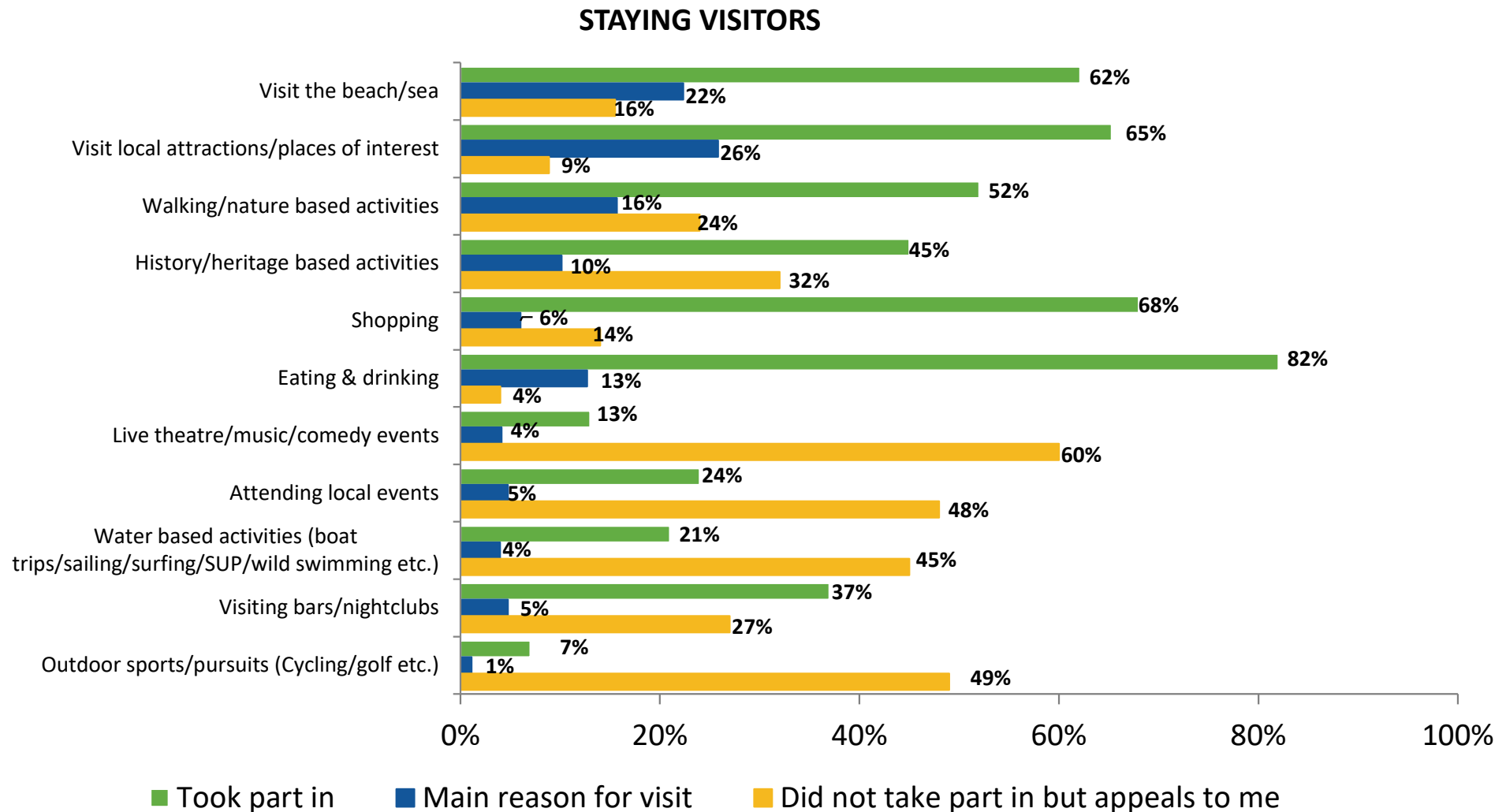
Shopping was a key driver for visiting for around double the proportion of day visitors than staying visitors.

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.



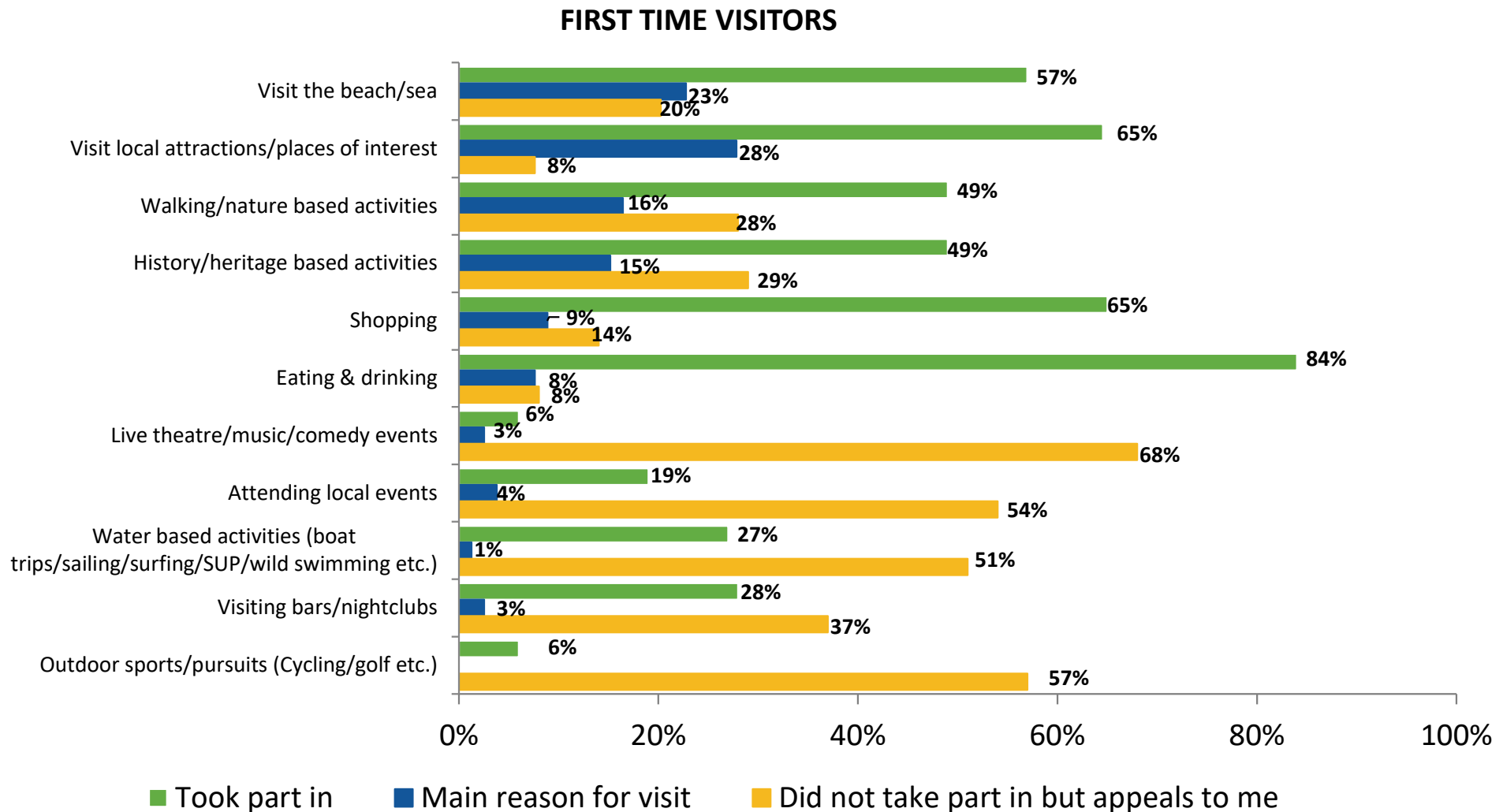
A higher proportion of staying visitors visited the beach/sea, local attractions/places of interest and bars/nightclubs than day visitors.

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.



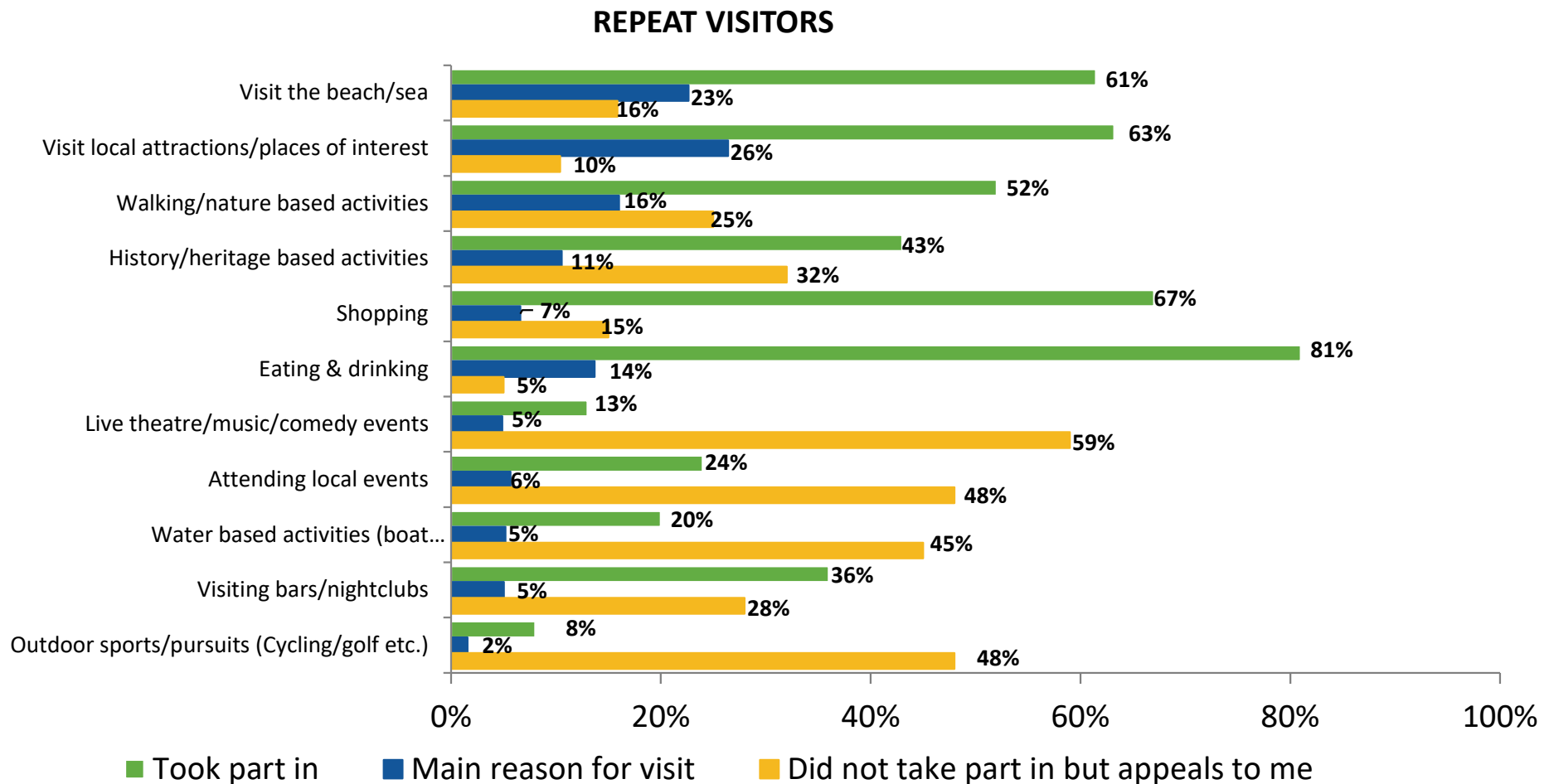
A higher proportion of first time visitors to the resort participated in history/heritage-based activities than repeat visitors.

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.



Repeat visitors were more likely to take part in some of the less popular activities such as attending live music/comedy events and local events than those experiencing the resort for the first time.

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.



The English Riviera Visitor Survey 2021

Visitors' Opinions of The English Riviera



**Those visiting during 2021 only (715 respondents)*



Introduction.

The 2021 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:

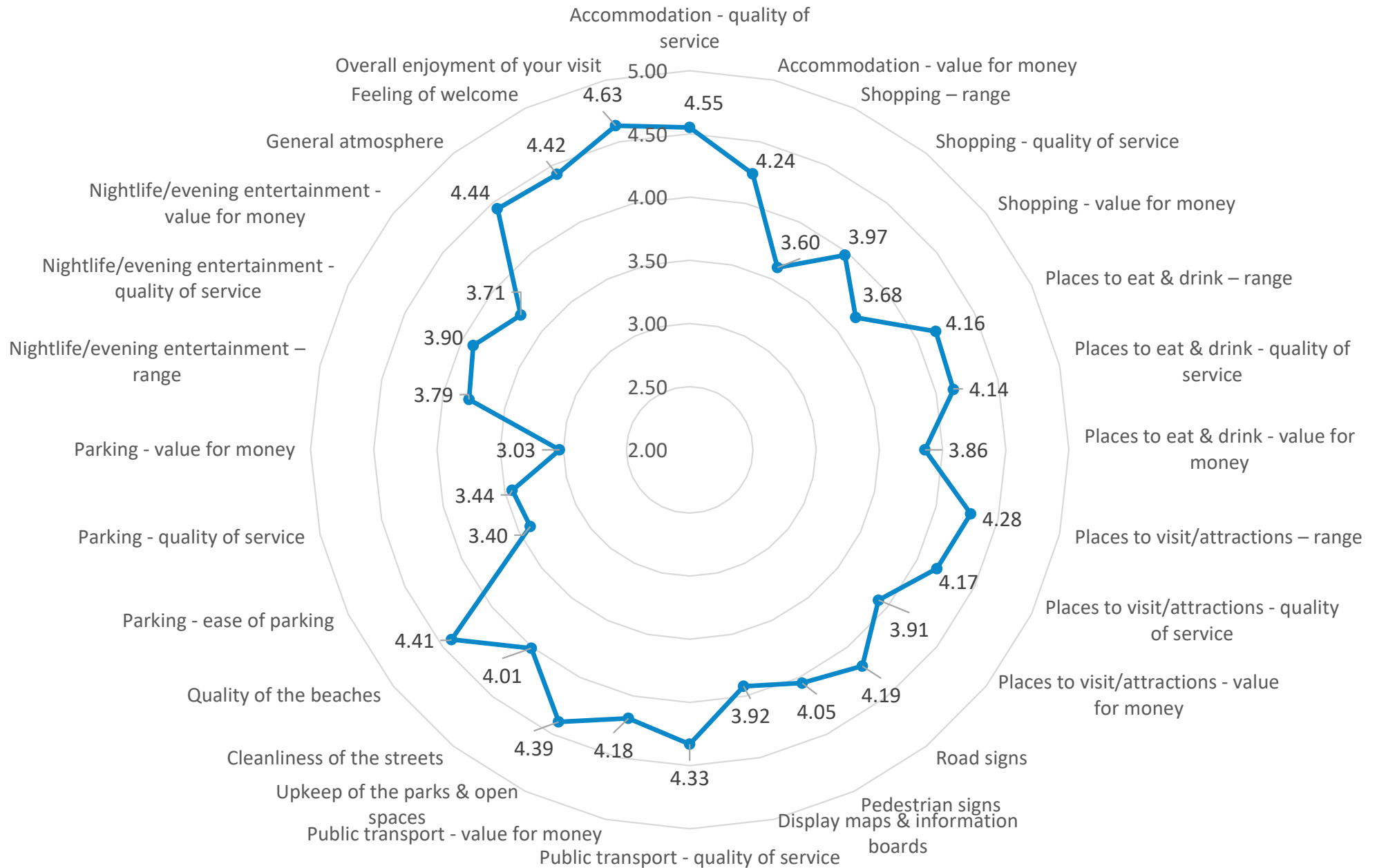
- Accommodation
- Shopping
- Places to eat & drink
- Places to visit/attractions
- Ease of finding way around
- Public transport
- Upkeep of parks and open spaces
- Cleanliness of streets
- Quality of the beaches
- Car parks
- Nightlife/evening entertainment
- General atmosphere
- Feeling of welcome
- 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	4.55	Public transport - quality of service	4.33
Accommodation - value for money	4.24	Public transport - value for money	4.18
Shopping – range	3.60	Upkeep of the parks & open spaces	4.39
Shopping - quality of service	3.97	Cleanliness of the streets	4.01
Shopping - value for money	3.68	Quality of the beaches	4.41
Places to eat & drink – range	4.16	Parking - ease of parking	3.40
Places to eat & drink - quality of service	4.14	Parking - quality of service	3.44
Places to eat & drink - value for money	3.86	Parking - value for money	3.03
Places to visit/attractions – range	4.28	Nightlife/evening entertainment – range	3.79
Places to visit/attractions - quality of service	4.17	Nightlife/evening entertainment - quality of service	3.90
Places to visit/attractions - value for money	3.91	Nightlife/evening entertainment - value for money	3.71
Road signs	4.19	Overall impression of the English Riviera in terms of general atmosphere	4.44
Pedestrian signs	4.05	Overall impression of the English Riviera in terms of feeling of welcome	4.42
Display maps & information boards	3.92	Overall enjoyment of your visit	4.63

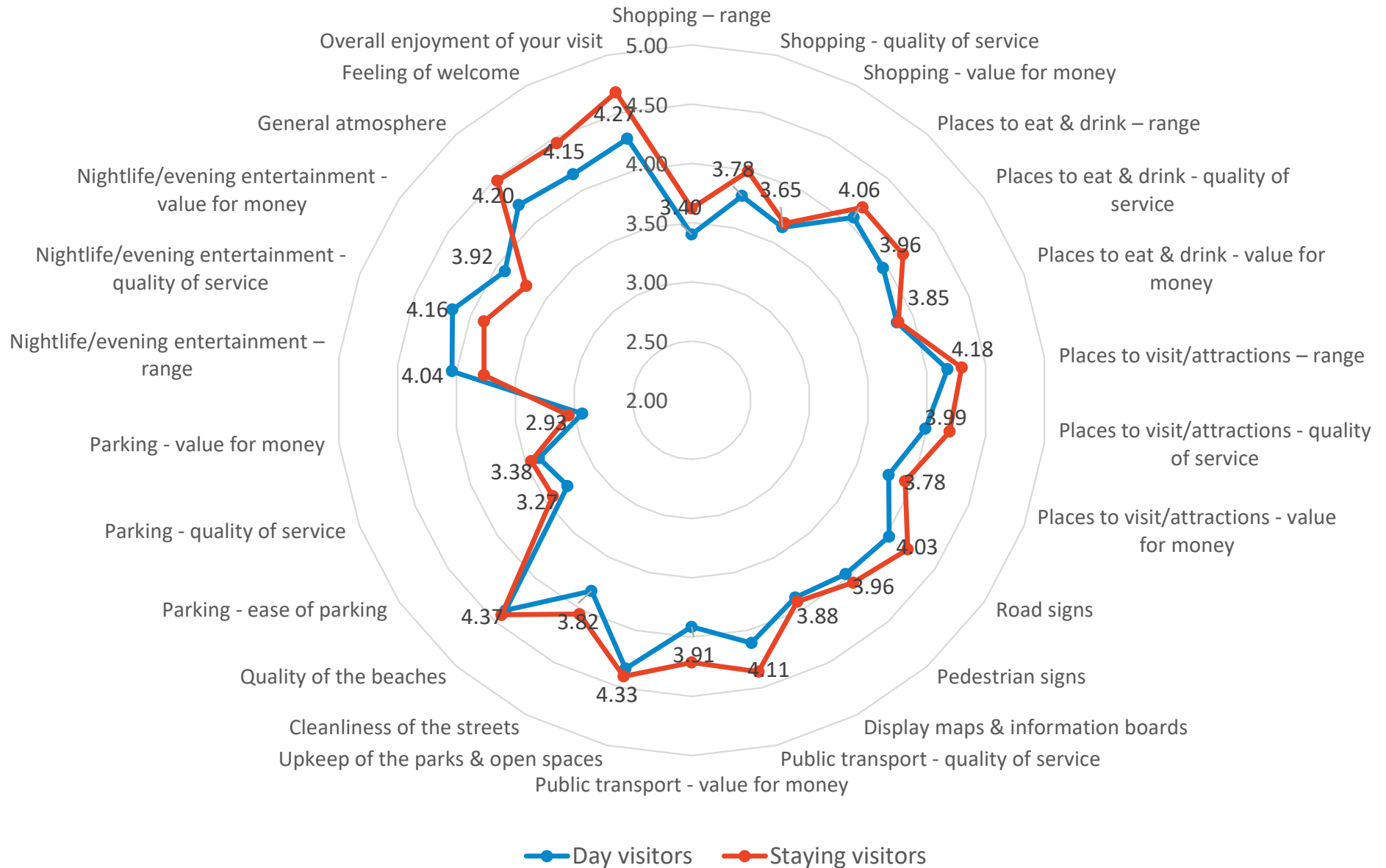
With the exception of parking satisfaction levels overall were high.



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	4.55	Public transport - quality of service	4.11	4.36
Accommodation - value for money	n/a	4.24	Public transport - value for money	3.91	4.21
Shopping – range	3.40	3.62	Upkeep of the parks & open spaces	4.33	4.40
Shopping - quality of service	3.78	3.99	Cleanliness of the streets	3.82	4.04
Shopping - value for money	3.65	3.69	Quality of the beaches	4.37	4.42
Places to eat & drink – range	4.06	4.17	Parking - ease of parking	3.27	3.42
Places to eat & drink - quality of service	3.96	4.17	Parking - quality of service	3.38	3.45
Places to eat & drink - value for money	3.85	3.87	Parking - value for money	2.93	3.05
Places to visit/attractions – range	4.18	4.30	Nightlife/evening entertainment – range	4.04	3.77
Places to visit/attractions - quality of service	3.99	4.19	Nightlife/evening entertainment - quality of service	4.16	3.88
Places to visit/attractions - value for money	3.78	3.93	Nightlife/evening entertainment - value for money	3.92	3.70
Road signs	4.03	4.22	Overall impression of the English Riviera in terms of general atmosphere	4.20	4.47
Pedestrian signs	3.96	4.06	Overall impression of the English Riviera in terms of feeling of welcome	4.15	4.45
Display maps & information boards	3.88	3.92	Overall enjoyment of your visit	4.27	4.68

Staying visitors typically had higher satisfaction levels than day visitors.



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	4.40	4.57	15	Public transport - quality of service	4.22	4.35
2	Accommodation - value for money	4.00	4.27	16	Public transport - value for money	4.07	4.19
3	Shopping – range	3.51	3.61	17	Upkeep of the parks & open spaces	4.43	4.39
4	Shopping - quality of service	3.86	3.98	18	Cleanliness of the streets	4.20	3.99
5	Shopping - value for money	3.56	3.70	19	Quality of the beaches	4.25	4.43
6	Places to eat & drink – range	4.00	4.18	20	Parking - ease of parking	3.39	3.40
7	Places to eat & drink - quality of service	4.08	4.15	21	Parking - quality of service	3.56	3.43
8	Places to eat & drink - value for money	3.79	3.87	22	Parking - value for money	3.17	3.02
9	Places to visit/attractions – range	4.21	4.29	23	Nightlife/evening entertainment – range	3.69	3.80
10	Places to visit/attractions - quality of service	4.05	4.19	24	Nightlife/evening entertainment - quality of service	4.00	3.89
11	Places to visit/attractions - value for money	3.95	3.91	25	Nightlife/evening entertainment - value for money	3.92	3.70
12	Road signs	3.99	4.22	26	Overall impression of the English Riviera in terms of general atmosphere	4.30	4.46
13	Pedestrian signs	3.94	4.06	27	Overall impression of the English Riviera in terms of feeling of welcome	4.27	4.43
14	Display maps & information boards	3.73	3.94	28	Overall enjoyment of your visit	4.42	4.66

On the whole, repeat visitors typically had higher satisfaction levels than first time 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, feeling of welcome and quality of the beaches on The English Riviera 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 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.

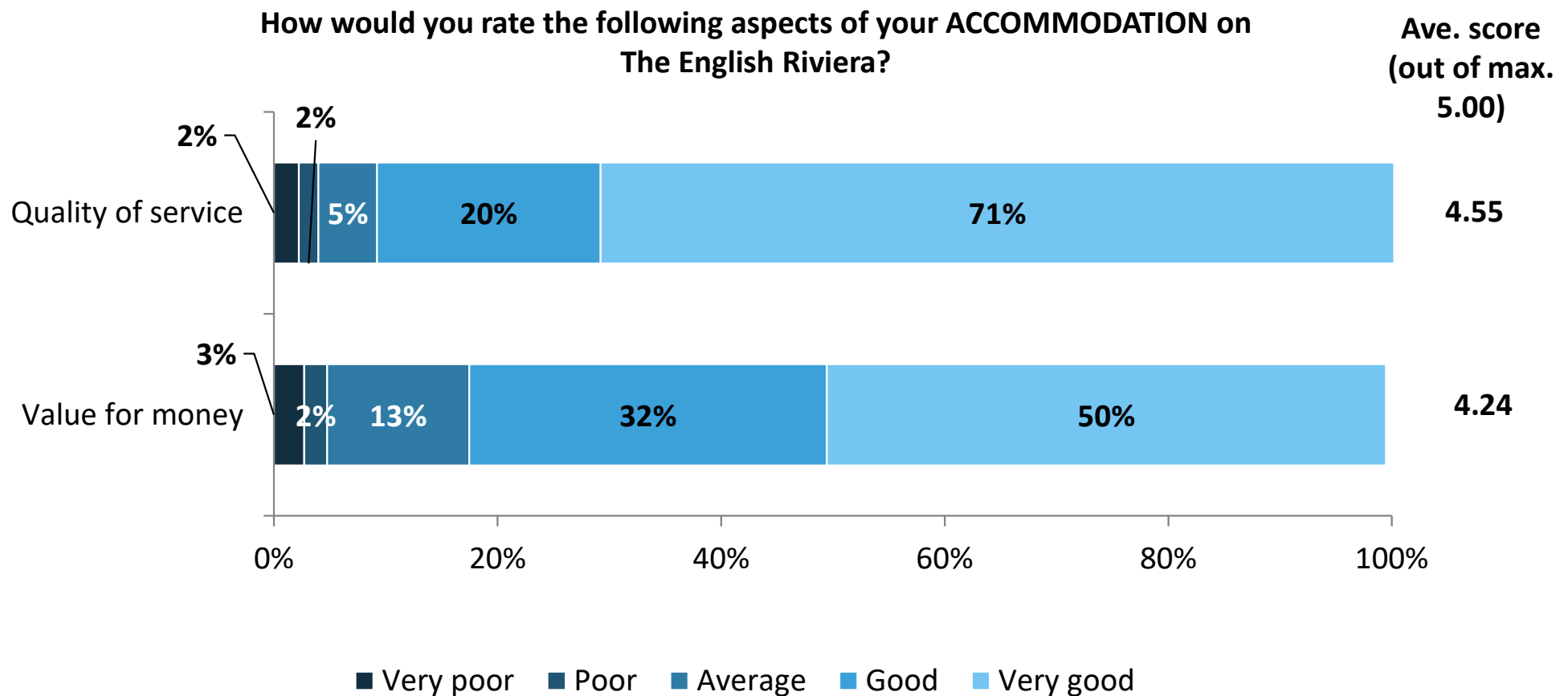
Of the bottom five categories, with scores of 3.68 or less, the bottom three were related to parking and the fourth and fifth to shopping. With respect to parking there are always things that can be done but whether visitors will ever be ‘happy’ with parking is another matter completely.

Satisfaction indicator	Score	Ranking	Satisfaction indicator	Score	Ranking
Overall enjoyment of your visit	4.63	1	Pedestrian signs	4.05	15
Accommodation - quality of service	4.55	2	Cleanliness of the streets	4.01	16
Overall impression of the English Riviera in terms of general atmosphere	4.44	3	Shopping - quality of service	3.97	17
Overall impression of the English Riviera in terms of feeling of welcome	4.42	4	Display maps & information boards	3.92	18
Quality of the beaches	4.41	5	Places to visit/attractions - value for money	3.91	19
Upkeep of the parks & open spaces	4.39	6	Nightlife/evening entertainment - quality of service	3.90	20
Public transport - quality of service	4.33	7	Places to eat & drink - value for money	3.86	21
Places to visit/attractions – range	4.28	8	Nightlife/evening entertainment – range	3.79	22
Accommodation - value for money	4.24	9	Nightlife/evening entertainment - value for money	3.71	23
Road signs	4.19	10	Shopping - value for money	3.68	24
Public transport - value for money	4.18	11	Shopping – range	3.60	25
Places to visit/attractions - quality of service	4.17	12	Parking - quality of service	3.44	26
Places to eat & drink – range	4.16	13	Parking - ease of parking	3.40	27
Places to eat & drink - quality of service	4.14	14	Parking - value for money	3.03	28

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.

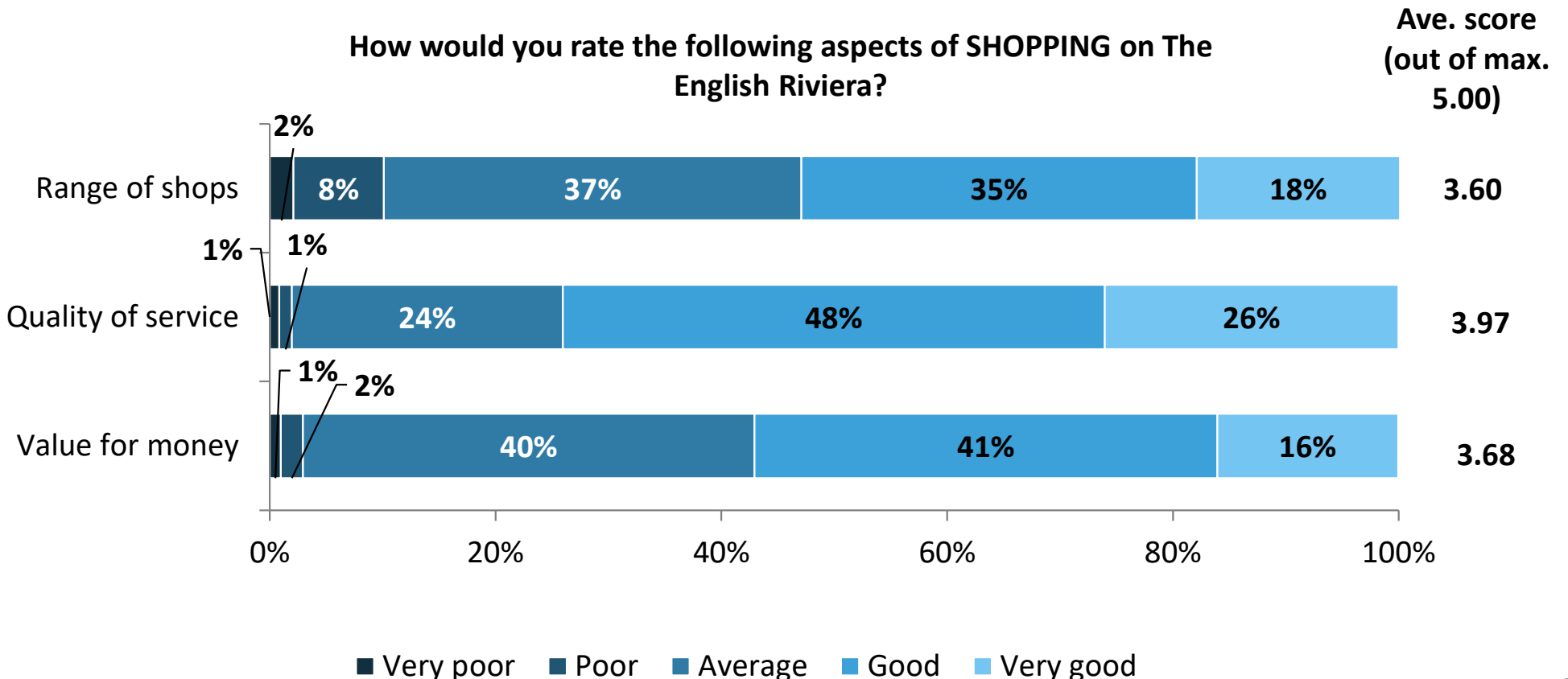
Satisfaction scores for The English Riviera were high with a score of 4.55 for quality of service (the second highest ranked indicator of all twenty eight factors explored during the 2021 survey) and a score of 4.24 for value for money (ranked ninth). If visitors have a perception of receiving value for money it can go a long way to achieving satisfaction overall.



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.

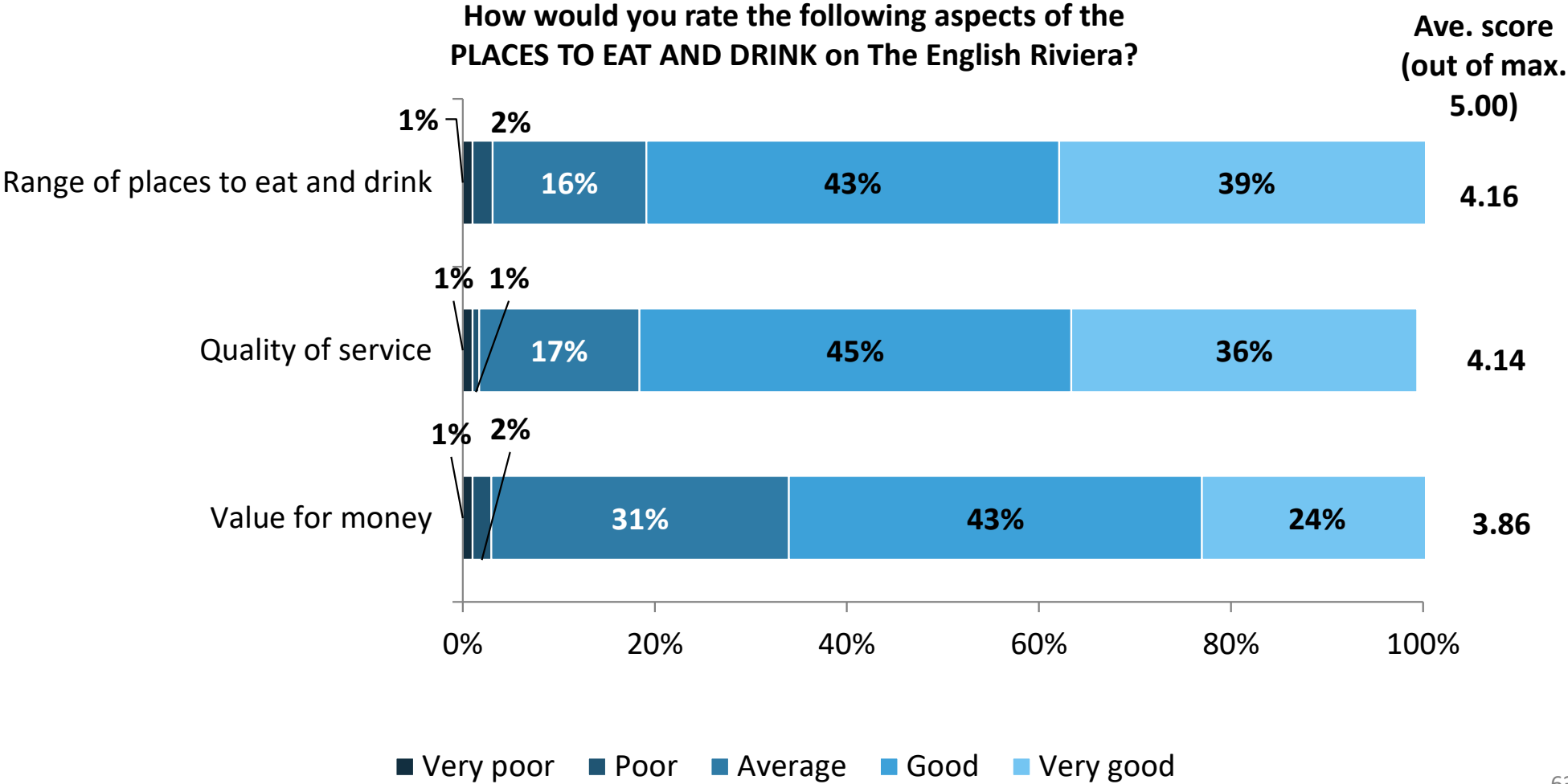
The top rated aspect of shopping is the quality of service and a sign that businesses are taking this most important aspect seriously. This is perhaps an area which requires a better understanding before considering taking any action. Whilst the majority of visitors do shop during their visit to The English Riviera it is not a main reason or driver for a 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.



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 4.0.

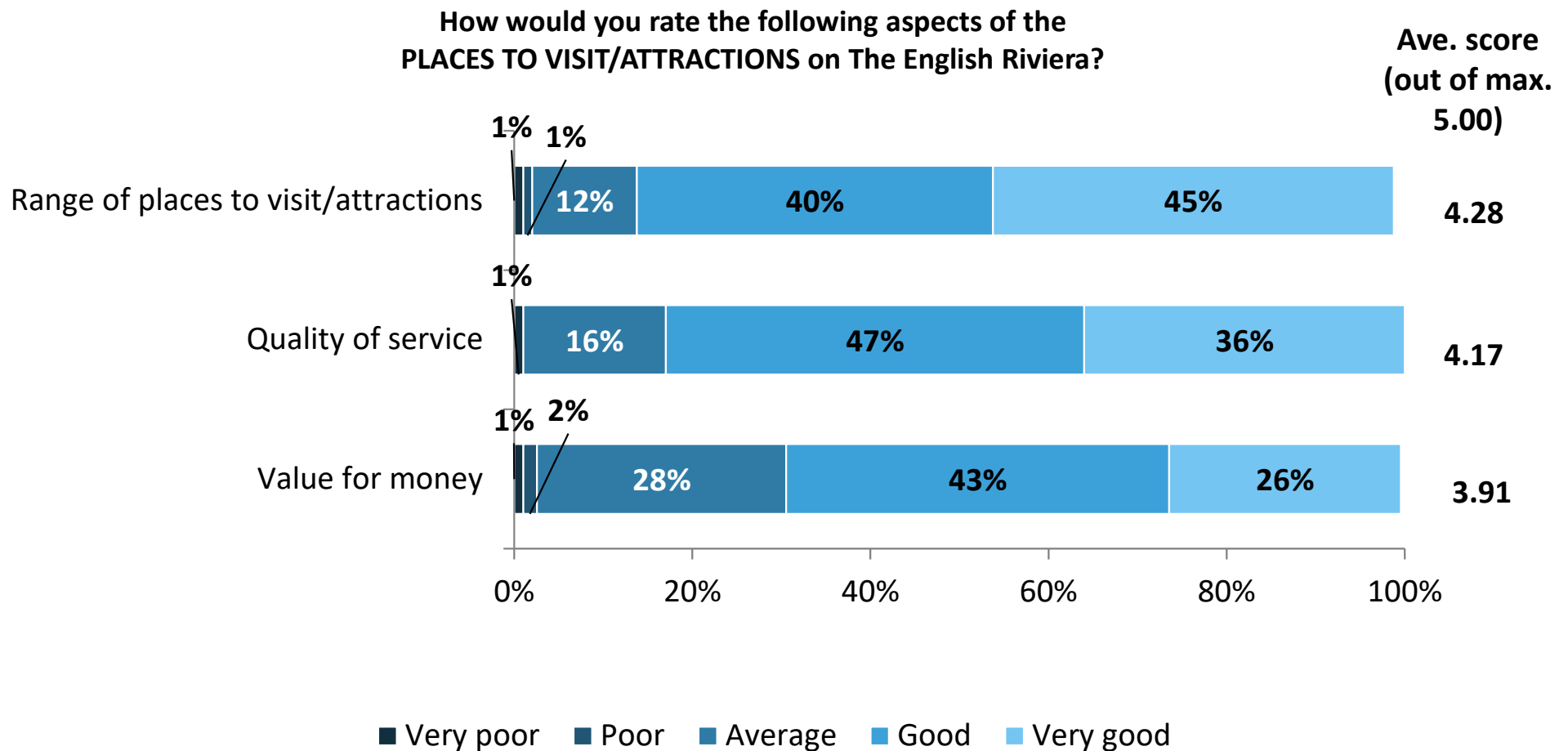
The value for money aspect of eating and drinking out scored lower and below the value for money scores for accommodation, public transport and places to visit/attractions resulting in it being the eighth lowest score of the twenty eight explored by the survey. Whilst satisfactory, it is an area that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



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 4.0. The score for the range of places to visit/attractions was within the top 10 scores achieved during the 2021 survey (eighth).

Whilst value for money achieved a lower score of 3.91 this is nonetheless the third highest value for money aspect explored in the survey behind the value for money of accommodation and public transport.



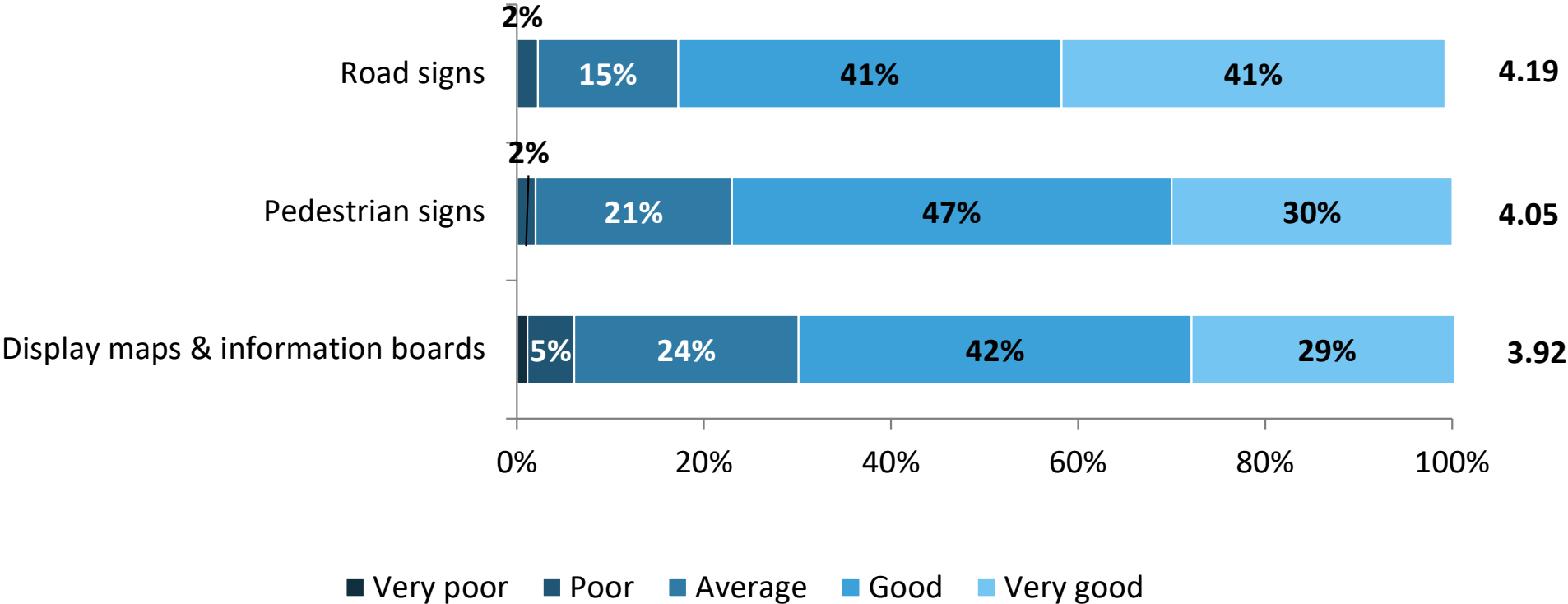
Signage heading in the right direction.

Signage for both road users and pedestrians received good visitor satisfaction scores above 4.0. Display maps and information boards was rated very slightly lower at 3.92 out of 5.0. The score for road signs was in the top 10 of all the factors explored during the 2021 survey (tenth).

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)

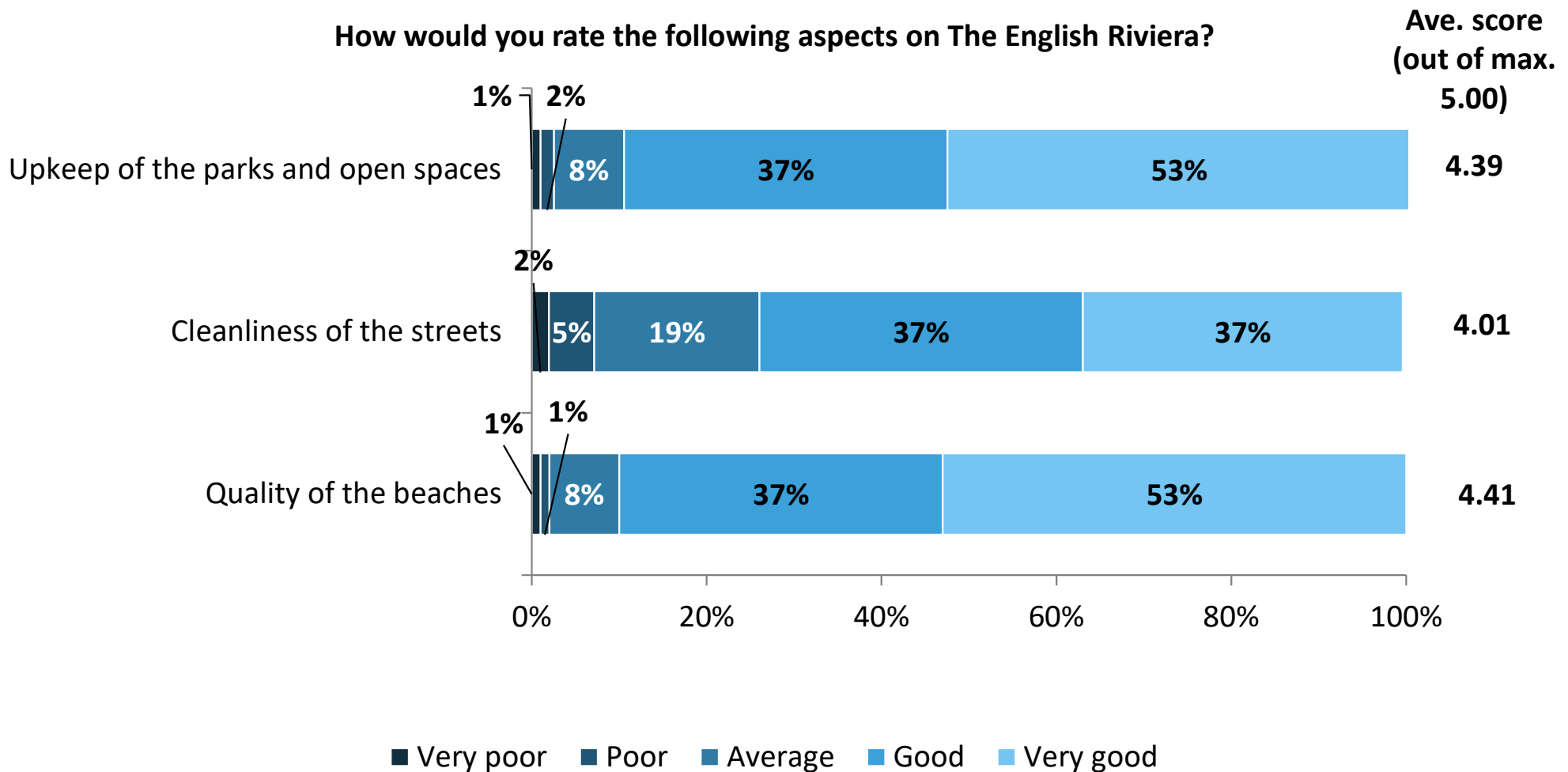


The resort cleans up well and has wonderful beaches.

Scores for both the upkeep of the parks and open spaces in the resort (4.39) and cleanliness of the streets (4.01) and were high. The score for the parks and open spaces was within the top 10 ranked indicators of those explored by the 2021 survey (sixth place).

The score achieved for the quality of the beaches on The English Riviera was the fifth highest rated factor explored by this survey and again offers potential marketing material to the ERBID. 90% of visitors rated the quality of the beaches as good (37%) or very good (53%).

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

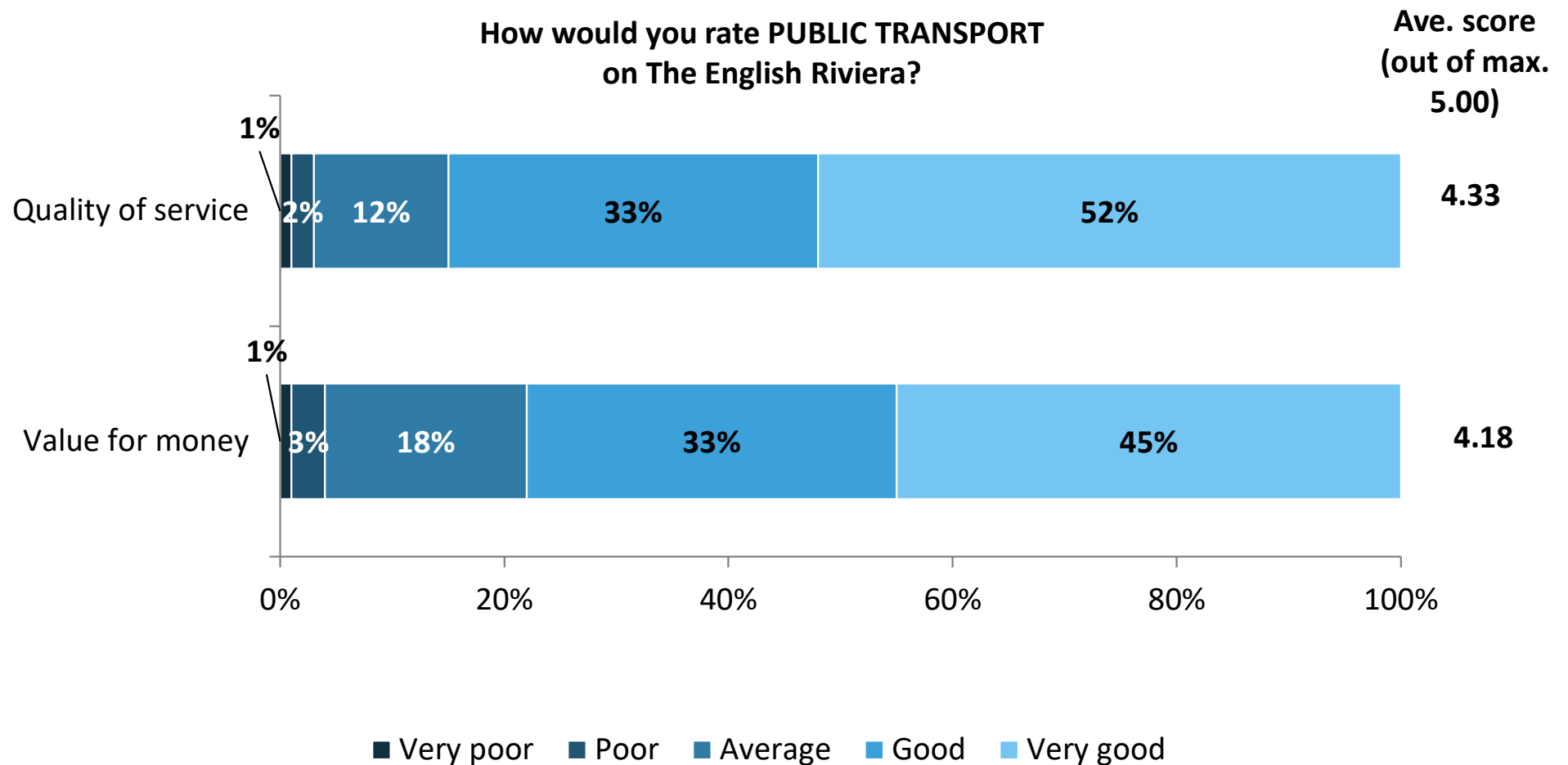


(N = 715)

All positive for public transport.

Both aspects of public transport tested also received good satisfaction scores with the quality of service and value for money rated to similar levels. Quality of service, at 4.33, was ranked the seventh highest score out of the twenty eight factors explored by the survey.

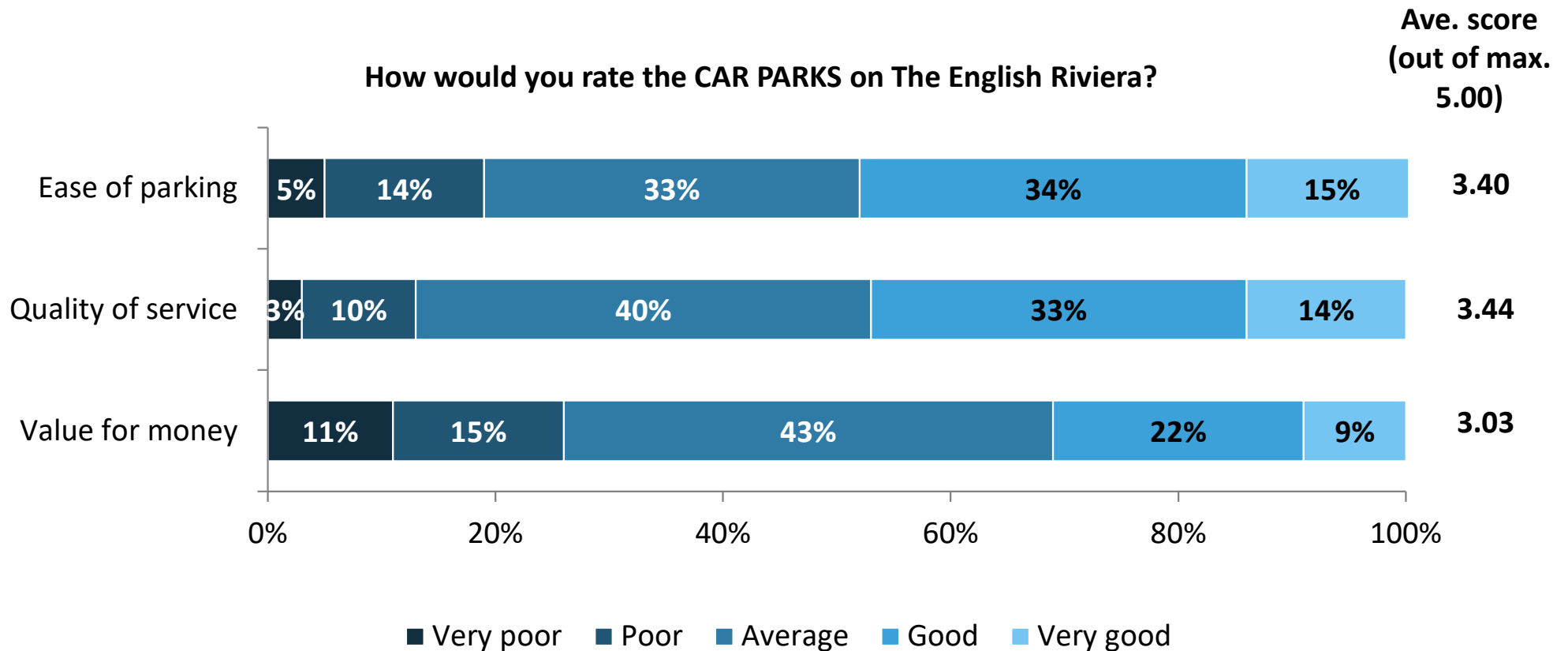
Considering that generally speaking public transport is the sort of topic that people are usually very quick to highlight the inefficiencies of the results of this survey should be viewed very positively.



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?



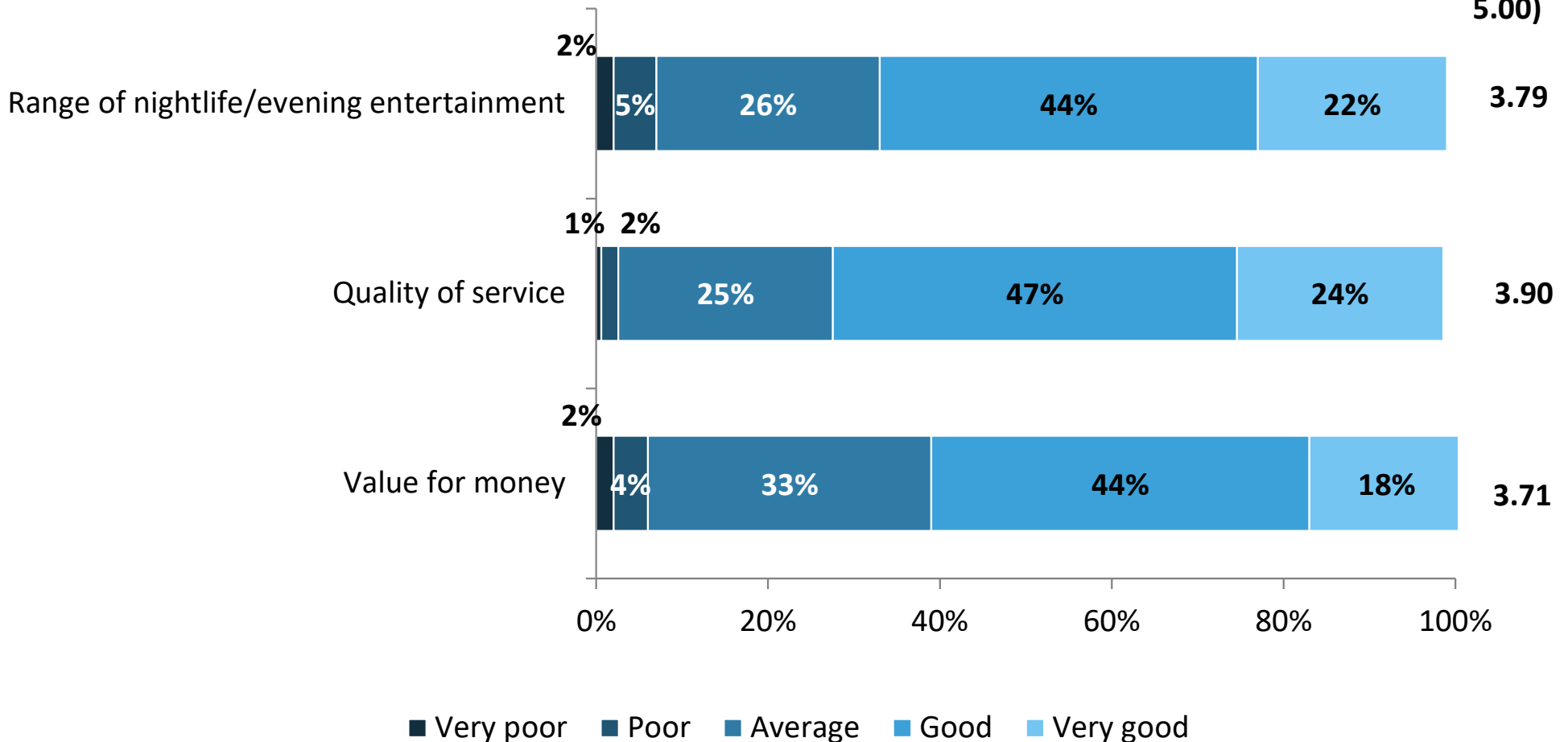
(N = 715)

Spotlight needed on nightlife.

All aspects of nightlife/evening entertainment received relatively low satisfaction scores compared to the other factors tested through this survey with all three factors ranked in the bottom ten scores with value for money and range ranked sixth and seventh lowest respectively 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)

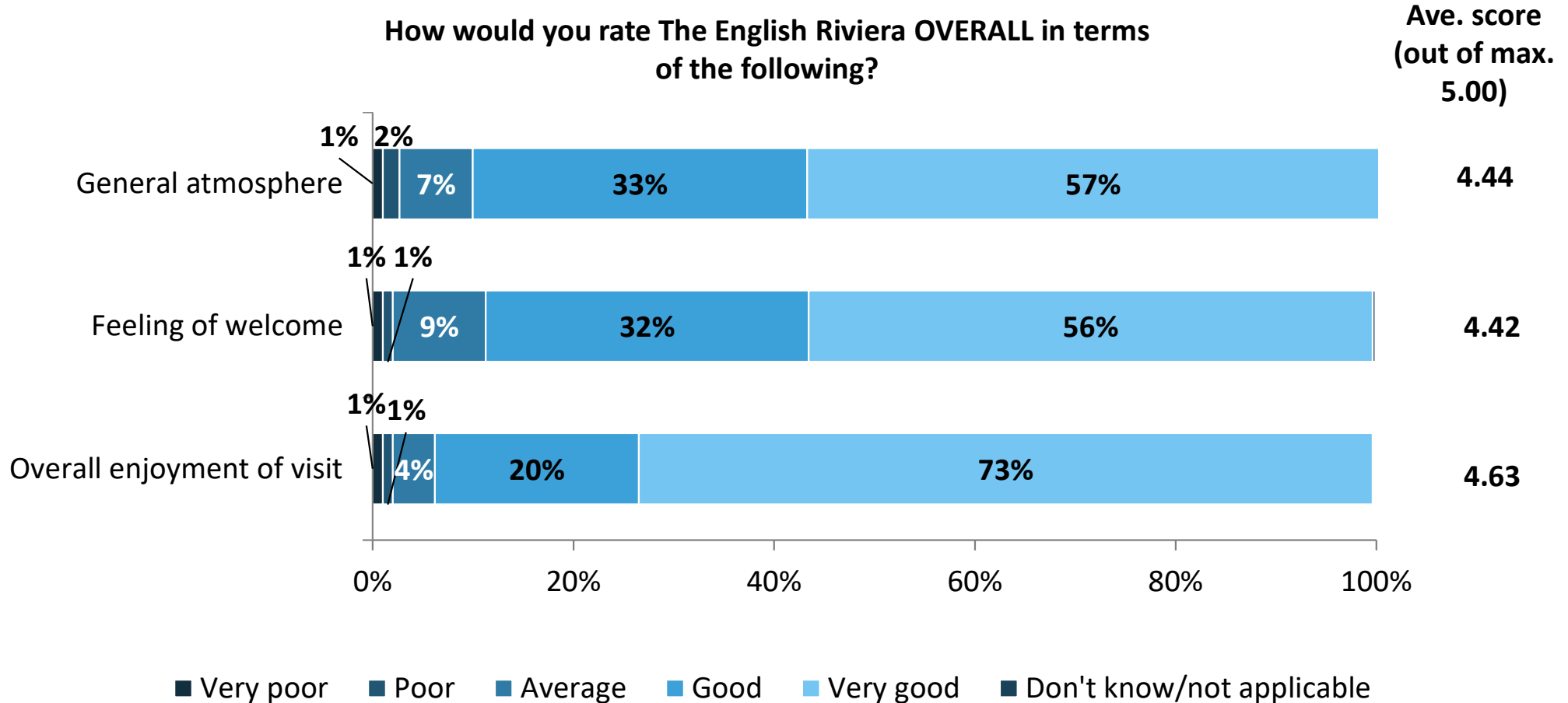


(N = 715)

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 4.63 out of 5, general atmosphere was ranked third at 4.44 out of 5.0 and feeling of welcome fifth at 4.42 out of 5. This provides a very good indication that overall visitors are highly satisfied with their visitor experience on The English Riviera.

However, it is also worth highlighting again as well that these scores are upheld by repeat visitors to the resort and first impression could be better for those visiting the resort for the first time.



(N = 715)

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.



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.

$$\% \text{ Promoters} - \% \text{ Detractors} = \text{RECOMMENDATION SCORE}$$

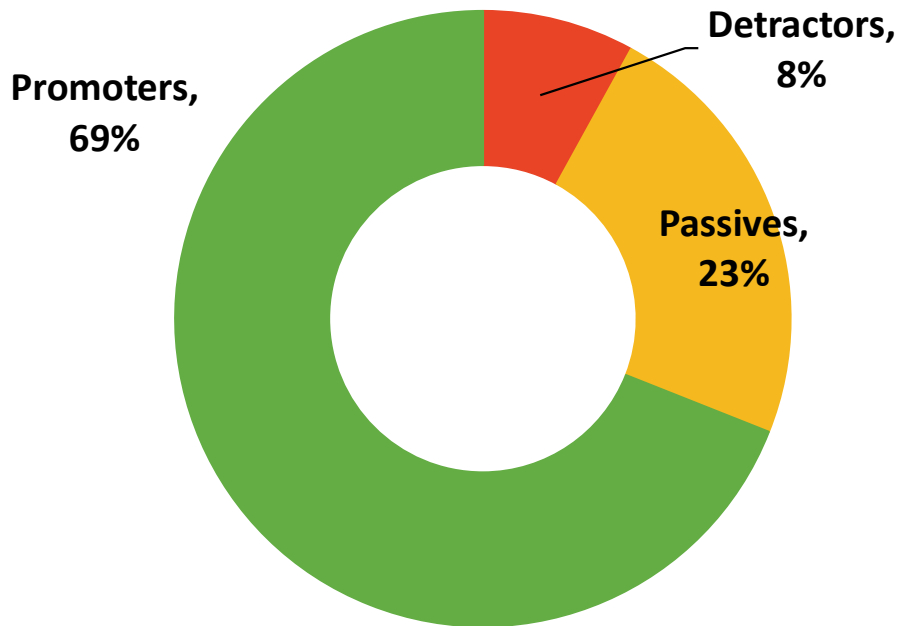
The higher or more positive the Recommendation Score the more satisfied the customer base.

The resort received a good recommendation score.

The English Riviera achieved an overall Recommendation Score of +61%. 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 +70% during the last visitor survey undertaken in 2016.

69% 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', 23% 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?



(N = 715)

Recommendation score +61%

Recommendation score	Day visitors	Staying visitors	First time	Repeat visitors
Detractors	20%	6%	18%	7%
Passives	29%	22%	25%	22%
Promoters	51%	72%	57%	71%
RECOMMENDATION SCORE	+31%	+65%	+39%	+64%

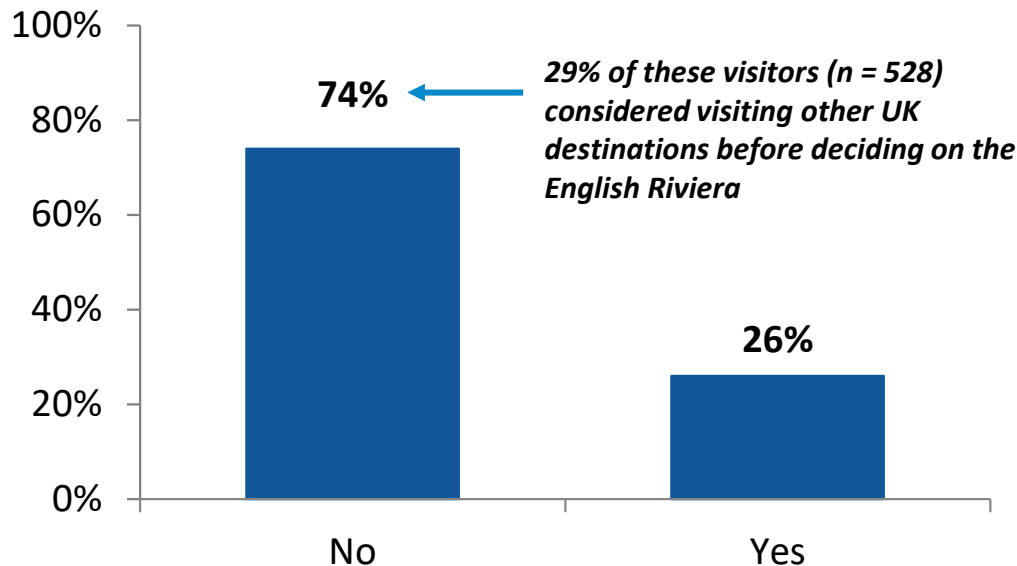
Staying visitors achieved a much higher recommendation score than day visitors (+65% compared with +31%) and repeat visitors a much higher score than first time visitors (+64% compared with +39%).

Around a quarter of 2021 visitors said their trip to the resort had replaced a holiday that they would normally have taken abroad. The resort was the only choice for 71% of visitors who would not normally have gone abroad.

Around a quarter of 2021 visitors to The English Riviera (26%) said their trip to the resort had replaced a holiday that they would normally have taken abroad. This proportion increased to 67% of first time visitors to the resort compared with 21% of repeat visitors.

Amongst the 74% of visitors who said their trip to the resort had not replaced one which would normally have been taken abroad, 29% said they had considered visiting other UK destinations before deciding on visiting The English Riviera (58% of first time visitors and 27% of repeat visitors). A wide range of other UK destinations were considered including Cornwall, Dorset, Bournemouth, the Cotswolds, the Isle of Wight, the Lake District, Norfolk, Scotland, Wales and Weymouth and the full list can be found in the appendix which accompanies this report.

Did your trip to The English Riviera replace a holiday that would normally have been taken abroad?



(N = 715)

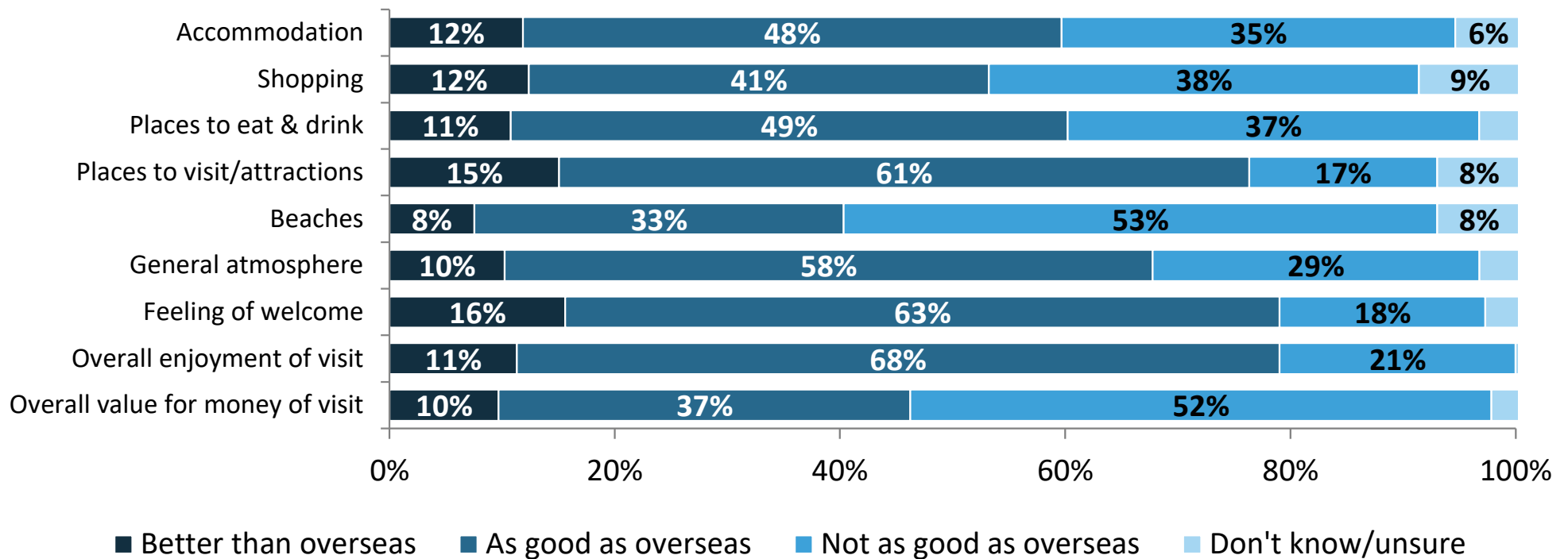
Whether replaced a holiday abroad	First time	Repeat visitors
Yes	67%	21%
No	33%	79%
Whether considered visiting any other UK destinations before deciding on The English Riviera	First time	Repeat visitors
Yes	58%	27%
No	42%	73%

The resort competes well against overseas holidays in all aspects except beaches and overall value for money.

For almost all of the aspects explored below, The English Riviera competed well against overseas holidays with the majority of visitors (who normally would go abroad) saying the resort was 'as good as' or 'better' than their usual overseas holiday – in particular in terms of overall enjoyment of visit and feeling of welcome (79% of respondents in each case). These are all good marketing opportunities for the ERBID.

In terms of its beaches and overall value for money however, 53% and 52% of respondents respectively did not consider the resort as good as its overseas counterparts and whilst value for money may need to be explored further, for beaches it is probably just a case of highlighting more about what's available in any marketing or promotional materials.

How would you rate the following aspects of your visit to The English Riviera compared to your usual overseas holiday?



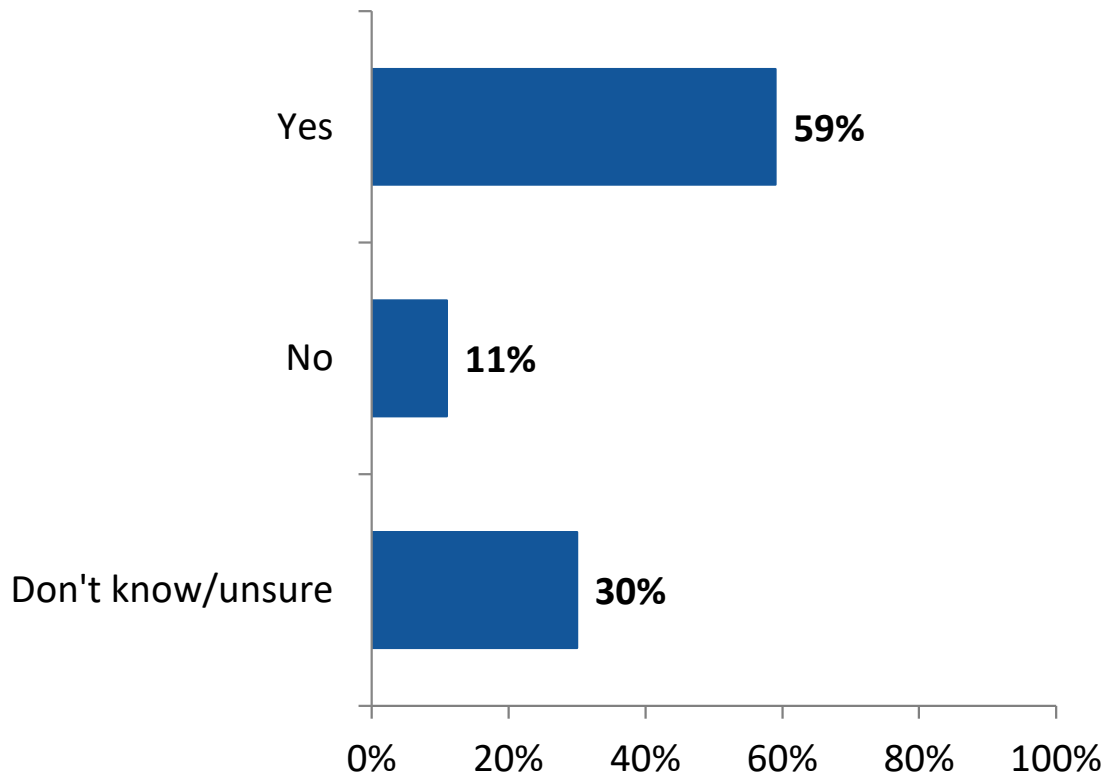
(N = 187)

59% plan to return to holidaying abroad again next year.

59% of 2021 visitors who said their visit to the resort had replaced a holiday they would normally have taken abroad said they will return to holidaying abroad next year. 11% said they would not and 30% were unsure.

55% of first time visitors to the resort who said their trip to resort had replaced a holiday they would normally have taken abroad said they will return to holidaying abroad next year compared with 61% of repeat visitors.

Do you plan to return to holiday abroad next year?



(N = 187)

Whether plan to return to holiday abroad next year	First time	Repeat visitors
Yes	55%	61%
No	13%	10%
Don't know/unsure	32%	29%

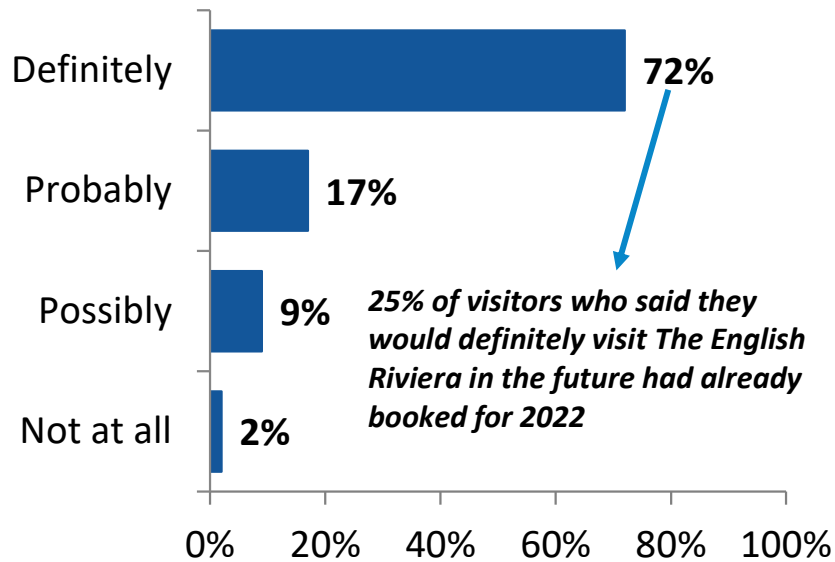
72% of all survey respondents will definitely visit the resort in the future including 67% who plan to return to holidaying abroad next year.

72% of all survey respondents, regardless of whether they had previously visited the resort or not, said they definitely will visit The English Riviera in the future, with this proportion increasing to 75% of 2021 visitors. A further 17% said they probably would and 9% said they possibly would.

Only 2% were sure they would never 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 (76%) compared with day visitors (71%) as was the case for almost twice the proportion of repeat visitors compared with those visiting for the first time during 2021 (80% and 42% respectively). These proportions also compare with 67% of respondents who said they planned to return to holidaying abroad next year and 65% who did not.

Will you visit The English Riviera in the future?



(N = 1,367)

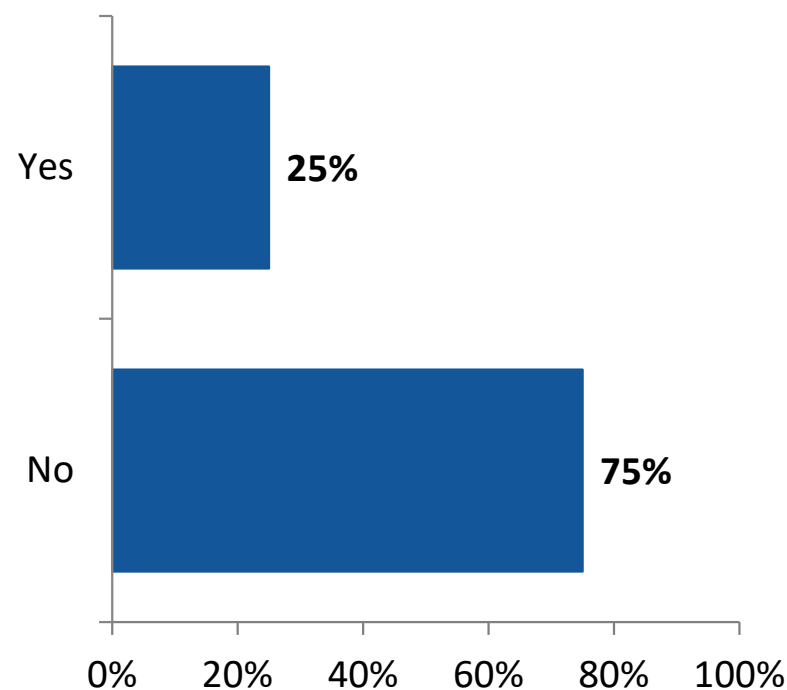
Whether will visit The English Riviera in the future	Day visitors	Staying visitors	First time	Repeat visitors	Plan to return abroad next year	Do not plan to return abroad next year
Definitely	71%	76%	42%	80%	67%	65%
Probably	19%	14%	28%	13%	13%	20%
Possibly	10%	8%	24%	6%	16%	10%
Not at all	-	2%	6%	1%	5%	5%

A quarter had already booked for 2022 including 22% who plan to return to holidaying abroad next year.

Those respondents who said they would definitely visit the resort in the future were asked if they had booked to visit in 2022.

A quarter said they had including 28% of day visitors, 35% of staying visitors, 18% of first time visitors to the resort and 36% of repeat visitors. These proportions also compare with 22% of respondents who said they planned to return to holidaying abroad next year and 15% who did not.

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



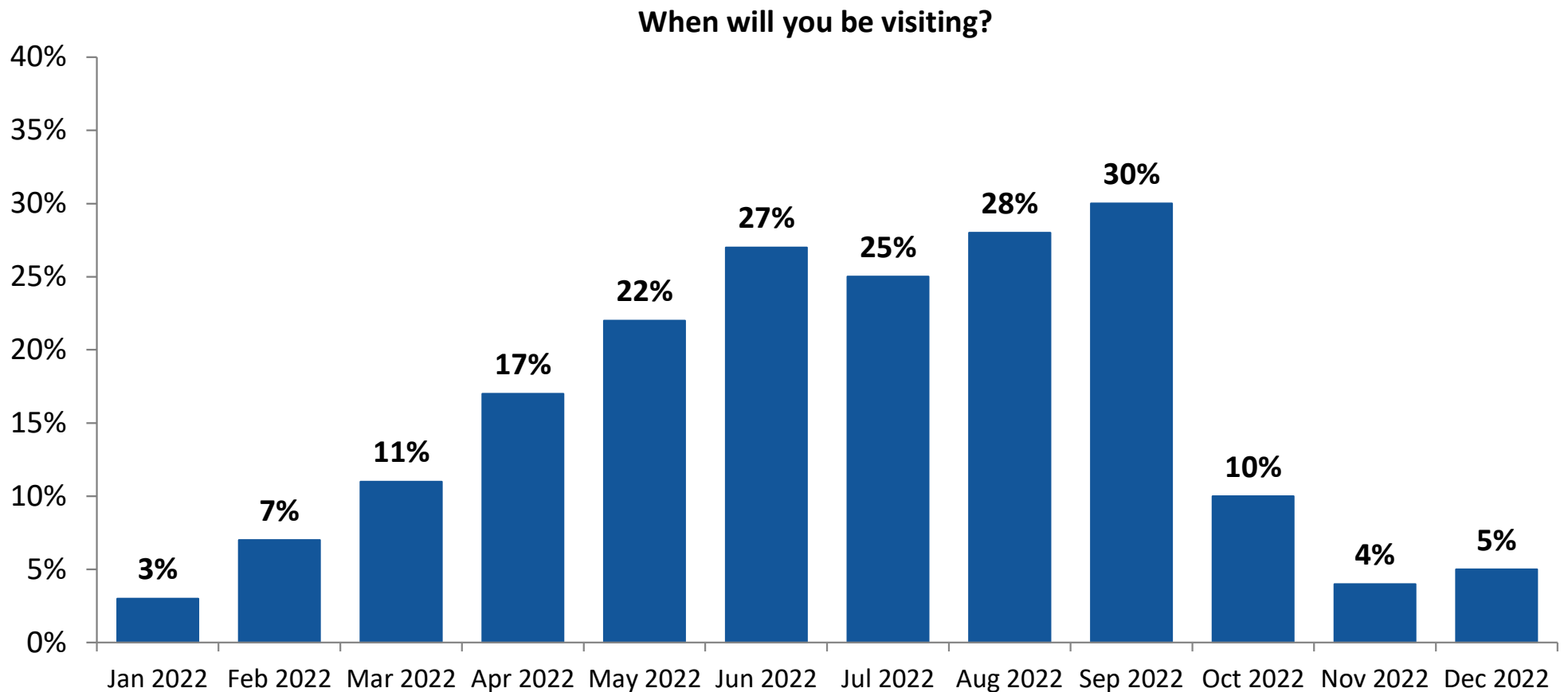
(N = 1,367)

Whether already booked to visit in 2022	Day visitors	Staying visitors	First time	Repeat visitors	Plan to return abroad next year	Do not plan to return abroad next year
Yes	28%	35%	18%	36%	22%	15%
No	72%	65%	82%	64%	78%	85%

30% had already booked to visit in September 2022, 28% in August 2022 and 27% in June 2022.

24% of respondents who said they would definitely visit the resort in the future said they had booked to visit in 2022. The largest proportion, 30%, said they would be visiting in September 2022, 28% in August 2022, 27% in June 2022 and 25% in July 2022.

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



The English Riviera Visitor Survey 2021



Lapsed/Non-Visitors



**Those visiting before 2021 (560 respondents) & those who had never visited (69 respondents)*

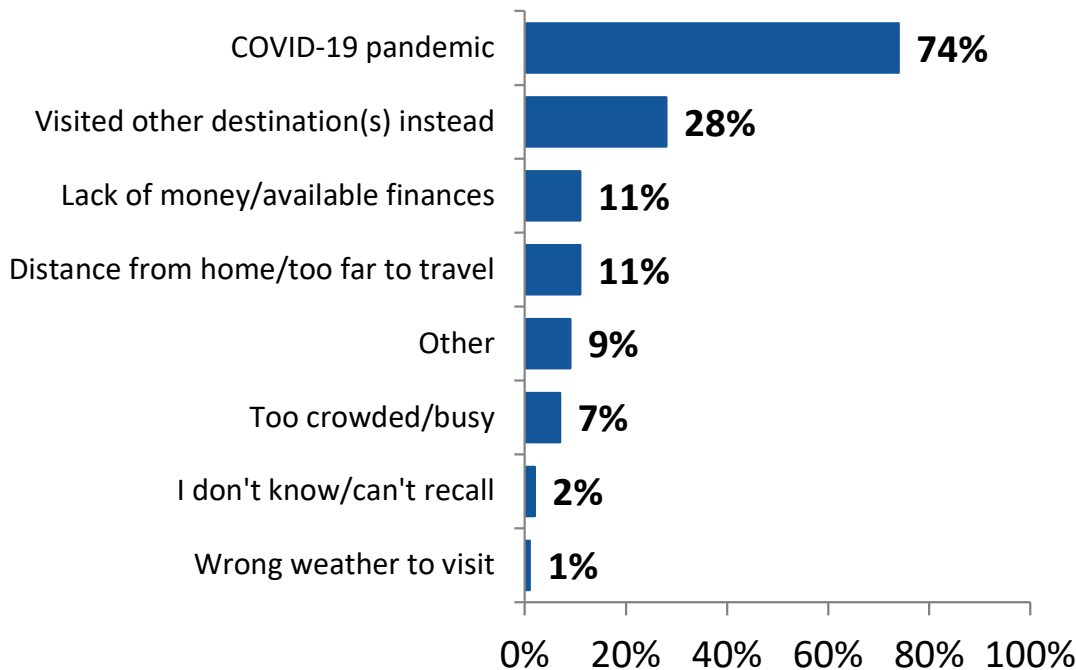


Covid-19 was the main reason for not visiting during 2021.

45% of all previous visitors to the resort had not visited The English Riviera during 2021 (lapsed visitors) 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 (74%) said it was due to the Covid-19 pandemic. 28% said they had visited other destination(s) instead and 11% in each case said it was due to a lack of money/available finances and/or because of the distance of the resort from their own home/too far to travel.

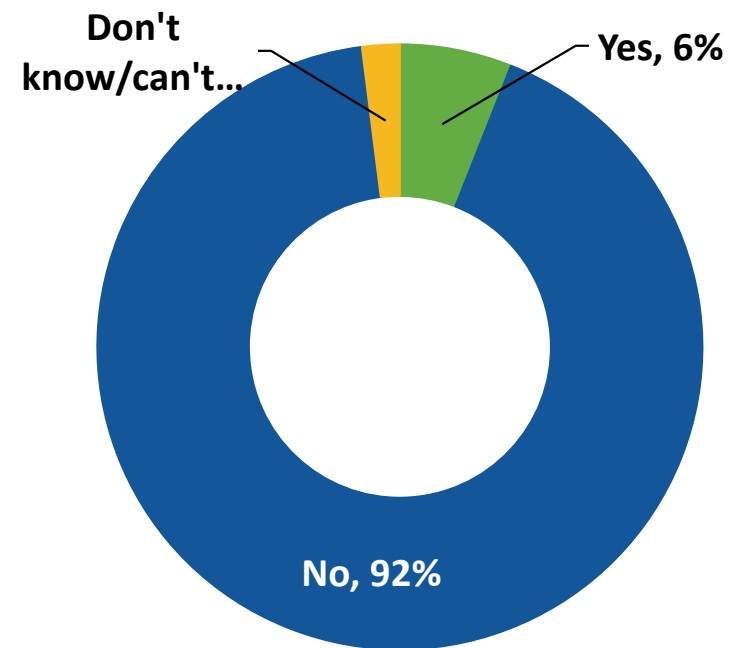
Reassuringly, 92% of these respondents said there had been no particular issues with their previous experience of visiting the resort which had deterred them from visiting during 2021. Amongst the 6% who said there were issues (37 respondents) these centred largely around Covid issues, the area being run down/scruffy/looking tired and/or accommodation being too expensive.

Why didn't you visit The English Riviera during 2021?



(N = 576)

Were there any particular issues with your previous experience of visiting the English Riviera which deterred you from visiting the resort during 2021?



(N = 579)

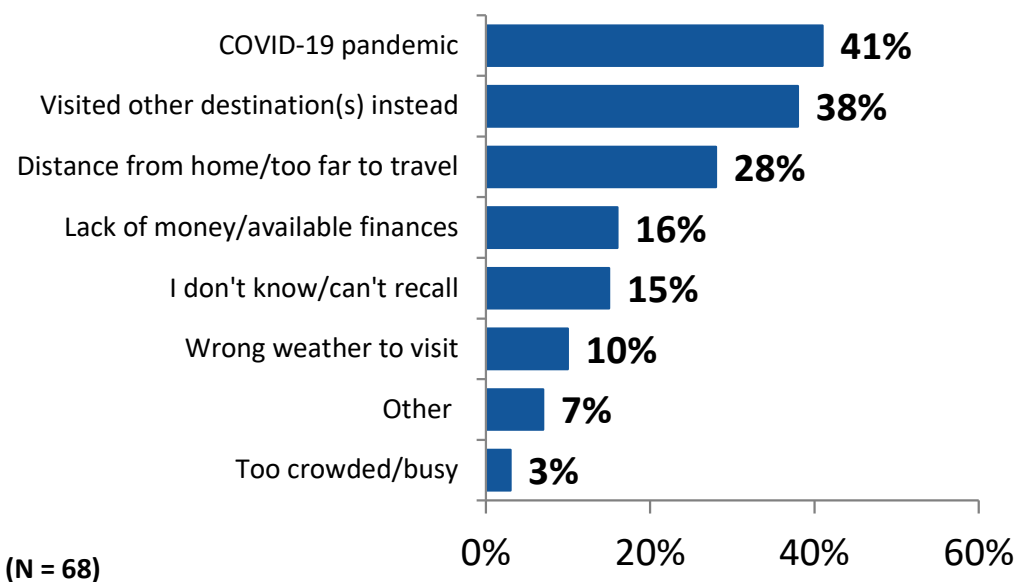
Covid-19 and visiting other destinations were the main reasons for having never visited.

24% of non-visitors had preconceived perceptions about The English Riviera which prevented them from visiting.

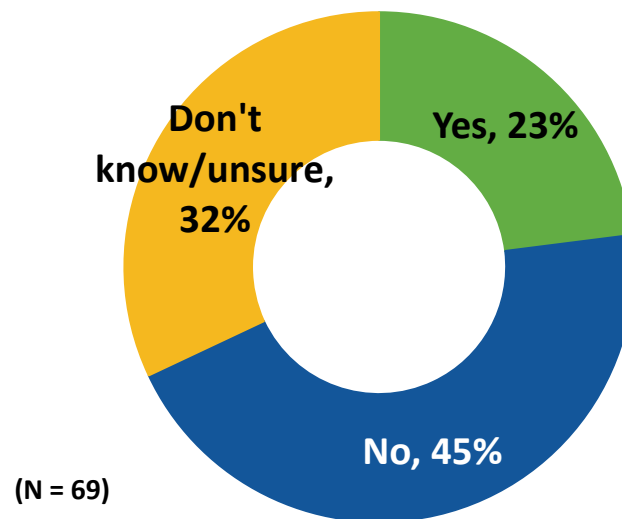
5% of all survey respondents had never visited The English Riviera and they were asked why this was the case. 41% said it was due to the Covid-19 pandemic, 38% said they visited other destination(s) instead (including Cornwall, Dorset The Isle of Wight, Norfolk, North Devon and Wales to name a few) and 28% said it was because of the distance of the resort from their own home/too far to travel. 16% said it was due to a lack of money/available finances.

Whilst they had never visited the resort, around a quarter of these respondents (24%, 16 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?



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?



The English Riviera Visitor Survey 2021

