



## COMPARISON OF 1993, 1996 & 1999 VISITOR SURVEYS

### INTRODUCTION

In recent years the English Riviera Tourist Board has carried out visitor surveys every three years to establish visitor profile, use of accommodation, booking procedure, use of the resort's facilities and perceptions of the resort. This report compares the results of the surveys carried out in 1993, 1996 and 1999.

The results for 1993 were based on 1,859 responses received during the summer of 1993 to 15<sup>th</sup> November 1993. 500 surveys were carried out as on-street interviews and the remainder was through questionnaires placed in accommodation units.

In 1996 face to face interviews of 460 holidaymakers were carried out in Torquay, Paignton and Brixham during the period June to September 1996.

The 1999 results quoted are based on 670 street interviews of people holidaying in the Bay or day visitors, carried out in Torquay, Paignton and Brixham in the period 5<sup>th</sup> April to 15<sup>th</sup> September 1999. This survey will be ongoing until March 2000 to establish a full year's pattern as a benchmark for future years.

### ACCOMMODATION USED

|                 | <b>1999</b> | <b>1996</b> |
|-----------------|-------------|-------------|
| Hotel           | 48%         | 50%         |
| Self Catering   | 26%         | 22%         |
| B&B/Guest House | 13%         | 10%         |
| Static caravan  | 5%          | 9%          |
| Touring caravan | 4%          | 4%          |
| Camping         | 2%          | 4%          |

## HOW ACCOMMODATION WAS BOOKED

|                      | 1999 | 1996 |
|----------------------|------|------|
| Been to accom before | 25%  | 34%  |
| ER Guide*            | 16%  | 19%  |
| Newspaper ad         | 16%  | -    |
| Travel agent         | 12%  | 15%  |
| Just turned up       | 10%  | 21%  |
| Coach Tour           | 11%  | 11%  |
| Recommendation       | 8%   | 15%  |

\* The 1993 survey showed that 36% of respondents had obtained a guide, but not how many of them had used it to book their accommodation

## WHEN THE BOOKING WAS MADE

|                  | 1999* | 1993* |
|------------------|-------|-------|
| Prior to January | 12%   | 11%   |
| January          | 9%    | 8%    |
| February         | 10%   | 8%    |
| March            | 11%   | 8%    |
| April            | 11%   | 6%    |
| May              | 12%   | 10%   |
| June             | 11%   | 9%    |
| July             | 13%   | 12%   |

\* Figures do not add up to 100 since different time scales were covered in the two surveys

## LENGTH OF STAY

- In 1996 the average length of stay of respondents was 6.9 nights
- In 1999 the average length of stay of respondents was 6.3 nights

## CUSTOMER LOYALTY

84% of respondents to the 1999 survey had visited the English Riviera before, compared to 79% in 1996 and 81% in 1993. Of 1999 visitors 66% had visited at least twice in the previous five years.

## MAIN ACTIVITIES WHILST ON HOLIDAY

|                     | 1999 | 1996 |
|---------------------|------|------|
| Shopping            | 83%  | 89%  |
| Walk coastal path   | 43%  | 70%  |
| Spend ½ day or more |      |      |
| on beach*           | 38%  | 62%  |
| Go to the theatre   | 21%  | 32%  |
| Attend an event     | 17%  | 32%  |
| Swim in the sea*    | 14%  | 32%  |
| Visit a nightclub   | 6%   | 11%  |
| Water sports        | 4%   | 8%   |

\*1999 survey also conducted in April and May.

## PLACES VISITED

|                | 1999 | 1996 | 1993 |
|----------------|------|------|------|
| Dartmoor       | 31%  | 34%  | 45%  |
| Plymouth       | 23%  | 27%  | 34%  |
| Steam Railway  | 22%  | 20%  | 25%  |
| Paignton Zoo   | 19%  | 24%  | 22%  |
| Riviera Centre | 15%  | 22%  | 30%  |
| Exeter         | 13%  | 15%  | 26%  |
| Kents Cavern   | 8%   | 12%  | 19%  |

## USED TOURIST INFORMATION CENTRE DURING THEIR STAY

|     | 1999 | 1996 | 1993 |
|-----|------|------|------|
| Yes | 24%  | 26%  | 30%  |

## VISITOR OPINIONS

|                    | 1999 | 1996 | 1993 |
|--------------------|------|------|------|
| <b>Cleanliness</b> |      |      |      |
| Excellent          | 24%  | 29%  | 22%  |
| Good               | 51%  | 67%  | 63%  |
| Average*           | 18%  |      |      |
| Poor               | 5%   | 4%   | 6%   |
| Very Poor          | 3%   | 1%   | 1%   |

\* "Average" was not given as an option in the 1996 and 1993 surveys

|                     | <b>1999</b> | <b>1996</b> |
|---------------------|-------------|-------------|
| <b>Things to do</b> |             |             |
| Excellent           | 35%         | 25%         |
| Good                | 50%         | 71%         |
| Average*            | 13%         |             |
| Poor                | 2%          | 3%          |
| Very Poor           | 0%          | 1%          |

\* “Average” was not given as an option in the 1996 survey

|                        | <b>1999</b> | <b>1996</b> |
|------------------------|-------------|-------------|
| <b>Value for money</b> |             |             |
| Excellent              | 60%         | 22%         |
| Good                   | 26%         | 75%         |
| Average*               | 8%          |             |
| Poor                   | 4%          | 2%          |
| Very Poor              | 1%          | 1%          |

\* “Average” was not given as an option in the 1996 survey

#### **AGE RANGE OF RESPONDENTS**

|         | <b>1999</b> | <b>1996</b> | <b>1993</b> |
|---------|-------------|-------------|-------------|
| 16 – 24 | 3%          | 5%          | 4%          |
| 25 - 34 | 10%         | 18%         | 9%          |
| 35 - 44 | 14%         | 20%         | 16%         |
| 45 - 54 | 20%         | 23%         | 25%         |
| 55 - 64 | 23%         | 19%         | 21%         |
| 65+     | 30%         | 16%         | 26%         |

#### **SOCIO-ECONOMIC STATUS OF RESPONDENTS**

|         | <b>1999</b> | <b>1996</b> | <b>1993</b> |
|---------|-------------|-------------|-------------|
| AB      | 27%         | 26%         |             |
| C1      | 16%         | 12%         |             |
| C2      | 36%         | 39%         |             |
| DE      | 20%         | 18%         |             |
| Retired | 37%         | 26%         | 23%         |

## PLACES OF ORIGIN OF RESPONDENTS

|                                | <b>1999</b> | <b>1996</b> |
|--------------------------------|-------------|-------------|
| West Midlands/Heart of England | 17%         | 19%         |
| South West                     | 12%         | 9%          |
| London/South East              | 12%         | 18%         |
| East Midlands                  | 10%         | 9%          |
| Wales                          | 9%          | 7%          |
| North West                     | 9%          | 9%          |
| Yorkshire                      | 6%          | 12%         |

## NEWSPAPERS AND MAGAZINES READ

|                    | <b>1999</b> | <b>1996</b> | <b>1993</b> |
|--------------------|-------------|-------------|-------------|
| Daily Mail         | 20%         | 20%         | 18%         |
| Daily Mirror       | 18%         | 22%         | 24%         |
| Mail on Sunday     | 18%         | 10%         | 15%         |
| The Sun            | 17%         | 28%         | 21%         |
| Sunday Mirror      | 14%         | 15%         | 17%         |
| Daily Express      | 7%          | 12%         | 20%         |
| Daily Telegraph    | 6%          | 6%          | 10%         |
| Sunday Express     | 5%          | 6%          | 15%         |
| Sunday Times       | 5%          | 2%          | 5%          |
| Sunday Telegraph   | 4%          | 3%          | 4%          |
| What's On TV       | 3%          | 1%          | 7%          |
| The Guardian       | 2%          | 1%          | 3%          |
| The Times          | 2%          | 5%          | 3%          |
| Daily Record       | 2%          | 4%          | 3%          |
| The Observer       | 1%          | 1%          | 3%          |
| The Independent    | 1%          | 1%          | 3%          |
| Daily Star         | 1%          | 7%          | 5%          |
| Sunday Independent | 1%          | 1%          | 2%          |
| Radio Times        | 1%          | 2%          | 10%         |
| TV Times           | 1%          | 4%          | 7%          |
| TV Quick           | 1%          | 3%          | 5%          |