

# English Riviera Tourism Company

## 2013 Marketing Evaluation

### Final Report

Produced for and on behalf of The English Riviera  
Tourism Company Ltd  
by The South West Research Company Ltd

March 2014



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# Summary Report – Background and methodology

In 2012, the English Riviera attracted approximately 997,000 staying visits from UK and overseas visitors combined with just under 3.8 million day visits, generating an estimated £432 million pounds worth of visitor related spend for the local economy. Approximately 8,800 jobs within the resort are tourism related, representing 21% of all employment.

In 2013 The English Riviera Tourism Company (ERTC) undertook a wide ranging integrated marketing campaign covering a number of different communication methods and promotional sources. The main focus of all marketing activity was to drive consumers to request visitor information, or to visit the English Riviera website to source information, and ultimately generate visits to the resort in 2013 and beyond.

The 2013 marketing campaign included things such as the promotion of the English Riviera via regular e-newsletter correspondence with consumers, radio, magazine and billboard advertisements and downloadable apps and brochures available through the website.

The English Riviera Tourism Company (ERTC) also produces a main accommodation guide on an annual basis as its core piece of promotional printed literature. The guide is designed to not only inform visitors on all aspects of their visit to the English Riviera but also to stimulate and influence potential visitors to holiday in the resort. The Accommodation Guide was promoted using a number of different marketing methods and could be requested online, by telephone and also through Tourist Information Centres where gauging usage is not possible so this evaluation is likely to underestimate the true value of the 2013 guide. More than 57,000 copies of the 2013 Accommodation Guide (2013 Guide) were distributed to requesters with over 22,000 of them providing email addresses.

In addition, potential visitors also received visitor information relating to the English Riviera through e-newsletters distributed by the ERTC. The total number of email contacts held for those receiving e-newsletters was approximately 25,000.

The ERTC commissioned this research to better understand the impact that their 2013 marketing activity had in terms of boosting business levels as well as the return that was achieved for their marketing investment. The outputs from the project would also allow them to have a greater insight into the characteristics of their visitors' and their visits and provide invaluable feedback on the 2013 visitor information to help inform campaigns for the future.

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had either requested a copy of the 2013 Guide or received promotional material (via e-newsletters etc.) and provided their email address to gather details of how the guide and other information was used, how comprehensive the information provided was, holidays taken and influenced.

# Summary Report - Final Key Results – Combined Overview

The final estimates, adjusted to allow for non-response bias, for those requesting the guide or viewing information online at the English Riviera website are summarised in the following table.

	<b>Guide Requesters</b>	<b>Internet Unique Visits Estimates</b>	<b>Total</b>
Value of influenced holidays/day visits	<b>£7,492,395</b>	<b>£3,835,990</b>	<b>£11,328,385</b>
Added value of extended influenced holidays	<b>£72,087</b>	<b>£43,736</b>	<b>£115,822</b>
<b>Total influenced value</b>	<b>£7,564,481</b>	<b>£3,879,726</b>	<b>£11,444,207</b>

An estimated £11.4 million pounds was influenced through the English Riviera 2013 marketing activity. Using the widely used and accepted national estimate of £50,000 visitor expenditure being required to generate a full time equivalent (FTE) job equates to 229 FTE's supported by the marketing activity.

# Summary Report - Return on Investment – Combined Overview

The figures in the table below, adjusted to allow for non-response bias, show the financial return achieved for those requesting the guide or viewing information online at the English Riviera website in relation to the monies invested.

	<b>Guide Requesters</b>	<b>Internet Unique Visits Estimates</b>	<b>Combined</b>
Marketing spend	£168,000	£50,000	<b>£218,000</b>
Value per £ holiday/day visit influenced	£44.60	£76.72	<b>£51.97</b>
Value per £ extended holiday influenced	£0.43	£0.87	<b>£0.53</b>
Combined value per £ spent (Return on investment)	£45.03	£77.59	<b>£52.50</b>

'Value per £' shows how much money was generated for each marketing pound spent.

**The table shows that English Riviera 2013 marketing activity overall generated an estimated £52.50 for each marketing pound spent.**

## Summary Report - Key Results – Combined Overview

The combined results for those requesting the guide or receiving marketing information, along with estimates for other unique visitors to the English Riviera website are summarised in the table below. The results shown display the survey outputs before non-response bias adjustment has taken place.

	<b>Guide Requesters</b>	<b>Internet Unique Visits Estimates</b>	<b>Total</b>
Number of influenced holidays	8,446	4,698	<b>13,145</b>
Value of influenced holidays	£9,408,131	£4,747,622	<b>£14,155,754</b>
Value per influenced holiday	£1,114	£1,010	<b>£1,077</b>
Number of extended holidays	195	138	<b>333</b>
Added value of extended holidays	£93,619	£56,800	<b>£150,419</b>
Added value per extended holiday	£481	£411	<b>£452</b>
Number of influenced day visits	4,949	2,674	<b>7,622</b>
Value of influenced day visits	£322,251	£234,183	<b>£556,434</b>
Value per influenced day visit	£65	£88	<b>£73</b>
<b>Total value of influenced holidays/visits</b>	<b>£9,824,002</b>	<b>£5,038,605</b>	<b>£14,862,607</b>

# Summary Report - Those Receiving 2013 Visitor Information

- 65% of all respondents recalled receiving the English Riviera 2013 visitor information.
- 49% of respondents in each case who sourced information via another source other than requesting a copy of the English Riviera official guide, recalled sourcing information through a visitor guide and/or the English Riviera website. 23% recalled receiving information via an e-newsletter.
- At the time of receiving the 2013 visitor information 20% of respondents had already booked a visit to the English Riviera.
- 49% of respondents had either taken or booked a holiday or taken a day visit in the English Riviera at the time of the survey.
- 95% of those taking holidays and 94% of those taking day visits stated that the 2013 visitor information or any subsequent visits to the English Riviera website had a degree of influence in their decision to visit the English Riviera.
- The primary usage amongst all visitors using the accommodation guide was to source information.
- 45% of guide requesters indicated that it had helped them 'a lot' in planning their visit.
- 82% of guide requesters felt that it had provided all of the information that they were looking for.
- The majority of guide requesters (61%) had requested other holiday brochures and 67% had taken a holiday somewhere else during 2013.
- Only 17% of guide requesters had chosen an alternative destination in preference to visiting the English Riviera.
- Approximately four fifths of visitors (82%) used the English Riviera website with 77% using it to source information for their visit.
- An average of 1.38 holidays were taken or booked on the English Riviera amongst visitors influenced by the information they had received. The average number of nights for all influenced holidays was 5.68 with the average number of people being 2.80.
- An average of 2.96 day visits were taken amongst those visitors influenced by the information with an average of 2.80 persons per visit for an average duration of five hours and thirty-seven minutes.
- 39% of all holidays and 33% of all day visits were taken between September to December 2013 (the same proportion of day visits were taken during the peak months of July and August).

# Summary Report - Those Receiving 2013 Visitor Information

- Half of all visitors chose serviced accommodation for their visit and 41% of visitors booked holidays with accommodation providers featured in the 2013 Accommodation Guide.
- 41% of all staying and day visitors combined stated that their expectations were exceeded when visiting the English Riviera.
- Just 2% of all respondents have ruled out visiting the English Riviera in 2014.
- 93% of respondents were from the UK with the South East (16%), South West (15%) and West Midlands (15%) providing the largest proportions of respondents.



# Summary Report - Conclusions

Whilst the importance of quality online promotion and communication continues to grow, the results from the English Riviera 2013 Marketing Evaluation clearly demonstrate that there is still a demand for quality printed literature amongst consumers to use either as a stand alone resource or alongside information obtained from the internet. Indeed, the findings from this project show that the wide ranging integrated marketing campaign drove consumers to request visitor information, or to visit the English Riviera website to source information, and ultimately generated visits to the resort in 2013 and beyond. The results clearly show not only a sizeable return for the investment required to generate the guides and visitor information resources, but also the influence that they have on converting possible visitors into actual ones. It should also be noted that this evaluation is likely to underestimate the full value of influenced visits to the resort. This is particularly the case in terms of the value of the English Riviera website with large numbers of repeat visitors to the site unaccounted for in this report as it is not possible to gauge the influence that the site had on them. However, it is perfectly reasonable to assume that a proportion of repeat visitors to the site would have been influenced to visit by the information that they viewed.

The 2013 Guide was well received by visitors providing a largely comprehensive information resource which it is safe to assume was easy for visitors to use based on the feedback received. That said, there are some useful indications as to what improvements should be considered in the future to improve the information provided. It should also be noted that the guides were used by many visitors who were not actually influenced to visit by the literature itself. Whilst additional holidays were not generated through these visitors the provision of a quality information resource is highly likely to have enhanced the visitor experience which will lead to subsequent repeat visits and word of mouth promotion of the resort.

It remains our opinion that the future of the guides and visitor information generally should be assured as long as the opinions of users remain positive and it continues to demonstrate a suitable return on investment. It could be assumed that this opinion is shared by businesses featured in the guide who, according to the findings, would appear to receive a significant amount of business as a result of their involvement. A further consideration is that it would be extremely difficult to evaluate marketing activity in the future without such activities and publications that require people to provide their contact details. These in turn provide a valuable research resource to give an insight into the success or failure of any subsequent marketing activity and to help steer future strategies.

Overall, the English Riviera's marketing activity in 2013 should be considered a success generating in excess of £11.4 million pounds in direct visitor expenditure for the resort and providing a very healthy return of approximately £53 for every pound invested in marketing.

Indeed, there is also a marked increase on both the value and the return on investment achieved by the 2013 Guide only activity (£7.6m visitor expenditure and £45 generated per pound invested) compared with the 2011 Guide (£6.2m visitor expenditure and £35 generated per pound invested) suggesting that English Riviera are making good progress in how they reach, communicate and influence consumers to holiday in the resort.

# Introduction - Background

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The ERTC commissioned this research to better understand the impact that their 2013 marketing activity had in terms of boosting business levels as well as the return that was achieved for their marketing investment. The outputs from the project would also allow them to have a greater insight into the characteristics of their visitors' and their visits and provide invaluable feedback on the 2013 visitor information to help inform campaigns for the future.

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had either requested a copy of the 2013 Guide or received promotional material (via e-newsletters etc.) and provided their email address to gather details of how the guide and other information was used, how comprehensive the information provided was, holidays taken and influenced.

# Introduction - Approach

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had:

**Received visitor information from The English Riviera Tourism Company in 2013 and had provided their email address.**

The approved evaluation questionnaire, which mirrors core questions used by VisitBritain and which is approved by the National Audit Office, explored a number of areas including:

Consumers' situation about holidaying or taking a day visit to the English Riviera prior to receiving information (plans to holiday/visit the English Riviera); their situation after (holidays and day visits taken or booked); number of holidays and day visits taken or booked; where they stayed, when they visited and length of stay; how much of an influence was the information in deciding to visit the resort; consumers' use of the English Riviera website ([www.englishriviera.co.uk](http://www.englishriviera.co.uk)).

The online survey was issued to all contacts held in the English Riviera email contact database during November 2013.

A total of 1,524 useable survey responses were received providing a usable, robust sample for analysis purposes in line with the margins of error detailed in this report.

# Introduction - Outputs

The results of the online survey were analysed to illustrate how effective the 2013 visitor information was.

Conversion ratios were established (how many respondents were influenced by the information to visit the English Riviera) and applied to the total number of people who recalled receiving the visitor information.

The influence of the 2013 visitor information is defined by respondents who stated that the information they received had either definitely, probably or possibly turned a possible visit into a certainty. Weightings have then been applied to the results for those respondents so that the responses of those definitely influenced were fully included in the calculations, a 50% weighting was applied to those probably influenced and a 20% weighting applied to those possibly influenced.

Those who were not influenced to visit the English Riviera by the information were asked the same question to establish if the information had influenced them to extend their visit to the English Riviera. The same weightings were then applied to those respondents who were influenced to extend their visit.

# Introduction – Statistical Reliability

When reading this report it is important to bear in mind that all sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered. The table below shows the margins within which one can be 95% certain that the true figures will fall (assuming the sample is random) for a variety of research findings.

Research findings	All respondents (1,524) (Margin % +/-)	All respondents recalling the information (1,025) (Margin % +/-)	All respondents visiting (506) (Margin % +/-)
10% or 90%	+/- 1.5%	+/- 1.8%	+/- 2.6%
20% or 80%	+/- 2.0%	+/- 2.4%	+/- 3.5%
30% or 70%	+/- 2.3%	+/- 2.8%	+/- 4.0%
40% or 60%	+/- 2.5%	+/- 3.0%	+/- 4.3%
50%	+/- 2.5%	+/- 3.1%	+/- 4.4%

The figures shown are at the 95% confidence limits. Thus, for example for all respondents, we can be 95% certain that for those questioned with a result of 50%, the true percentage range is between 47.5% to % 52.5%.

# Key Results – Guide requesters with email contacts

Top line results from the online survey applied to the total number of contacts who had provided an email address and recalled receiving the 2013 Guide (14,645 contacts) show that: -

A total of 4,774 holidays were **taken or booked** and influenced by the information.

With a total value of £5,317,978.

Equating to a value of £1,114 per holiday.

A further 110 holidays were **extended** due to the influence of the information.

With a total value of £52,919.

Equating to an added value of £481 per holiday extended.

A total of 2,797 day visits were **taken** and influenced by the information.

With a total value of £182,154.

Equating to a value of £65 per day visit.

**Resulting in a value of £5,553,051 which is attributable to the 2013 Guide.**

# Key Results – Guide requesters without email contacts - Calculations and assumptions

In addition to those that requested the guide and provided an email address a larger number of requests were received by potential visitors who did not supply an email address. These contacts were not captured in the survey sample and whilst they received the same information we cannot be sure that their behaviour was the same as the survey sample, particularly as they may not have online access. As a result the following assumptions have been made to produce estimates for this group.

## **Guide requests without email estimates based upon;**

Total number of requests – 34,658.

## **Of which;**

65% recalled receiving information (same as the guide survey sample ) – 22,528

**Survey findings applied to one in two (50%) of these requesters assumed to have acted in line with survey sample – 11,264**

# Key Results - Guide requesters without email contacts

Top line results from the online survey applied to the total number of guide requesters without email contacts who are likely to have acted in line with the survey sample show that : -

A total of 3,672 holidays were **taken or booked** and influenced by the information.

With a total value of £4,090,153.

Equating to a value of £1,114 per holiday.

A further 85 holidays were **extended** due to the influence of the information.

With a total value of £40,701.

Equating to an added value of £481 per holiday extended.

A total of 2,151 day visits were **taken** and influenced by the information.

With a total value of £140,098.

Equating to a value of £65 per day visit.

**Resulting in a value of £4,270,952 which is attributable to guide requesters without email contacts.**



## Key Results - The wider value of [www.englishriviera.co.uk](http://www.englishriviera.co.uk)

As previously stated, the English Riviera website [www.englishriviera.co.uk](http://www.englishriviera.co.uk) was a key element of the English Riviera 2013 Campaign with all aspects of the marketing containing details of the website address. In 2013 the ERTC undertook a significant integrated marketing campaign and whilst the previous pages estimate the value of those who received or were exposed to the visitor guide large numbers of potential visitors would have undoubtedly just visited the website and used it to source other information for their visit. It is likely that some were influenced to visit by the information they were exposed to on [www.englishriviera.co.uk](http://www.englishriviera.co.uk).

There are no means of reaching all of this group of people to ascertain their trip taking so to produce an estimate of the value of unique visits to the website a number of assumptions have been made to reduce the total figure of unique visits to what is assumed to be a safe base. Ratios from the current marketing evaluation have been applied to estimate the total value of their visits to the site.

The assumptions made and the outputs produced are shown overleaf and on the following pages although figures should be treated as no more than estimates and are likely to underestimate the true value of the English Riviera site and provide a safe figure to work from.

# Key Results - Other unique visits – Calculations and assumptions

**Other internet estimates based upon;**

Unique visits to site of more than 10 minutes duration (assumed minimum sufficient dwell time to source information) – 70,409

**Less;**

Total requests for print/responses that had visited website – 27,880

Total remaining – 42,529

**Survey findings applied to one in two (50%) of these unique visitors assumed to have acted in line with survey sample – 21,264**

# Key Results - Other internet estimates

Top line results from the online survey applied to the total number of unique website visitors estimate that : -

A total of 4,698 holidays were **taken or booked** and influenced by the website information.

With a total value of £4,747,622.

Equating to a value of £1,010 per holiday.

A further 138 holidays were **extended** due to the influence of the website information.

With a total value of £56,800.

Equating to an added value of £411 per holiday extended.

A total of 2,674 day visits were **taken** and influenced by the website information.

With a total value of £234,183.

Equating to a value of £88 per day visit.

**Resulting in an estimated value of £5,038,605 which is attributable to unique internet visits to the English Riviera website during the campaign period.**

## Key Results – Combined Overview

The combined results for those requesting the guide or viewing information online at the English Riviera website are summarised in the table below.

	Guide Requesters	Internet Unique Visits Estimates	Total
Number of influenced holidays	8,446	4,698	<b>13,145</b>
Value of influenced holidays	£9,408,131	£4,747,622	<b>£14,155,754</b>
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Total value of influenced holidays/visits	£9,824,002	£5,038,605	<b>£14,862,607</b>

# Non-Response Bias

The methodology used in this report follows the evaluation guidelines from VisitBritain as from 2006/07 it was agreed with DCMS that an adjustment would be made to all evaluation results to take account of non-response bias as identified by Luton University in its Non-Response Report commissioned by VisitBritain.

Professor Brian Mathews of Luton University was commissioned by England Research to investigate a suitable non-response factor and to investigate the effects of certain proposed changes agreed with the National Audit Office and DCMS. He conducted an analysis of a range of representative evaluations and produced a figure of -23% for non-response bias to be used to reduce domestic incremental spend.

Ideally, each evaluation carried out would have its own separate piece of research undertaken to establish the level of non-response bias to be applied to the evaluation results. However, this is not always practical, or achievable, with restrictions imposed through timescales and budgets. With this in mind it was agreed to use the VisitBritain non-response bias figure of -23% for the English Riviera evaluation on this occasion.

The following slides show the key results in terms of revenue generated and return on investment adjusted to take non-response bias into account.

# Final Key Results – Combined Overview

The final estimates, adjusted to allow for non-response bias, for those requesting the guide or viewing information online at the English Riviera website are summarised in the following table.

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# Return on Investment

The figures in the table below, adjusted to allow for non-response bias, show the financial return achieved for those requesting the guide or viewing information online at the English Riviera website in relation to the monies invested.

	<b>Guide Requesters</b>	<b>Internet Unique Visits Estimates</b>	<b>Combined</b>
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Combined value per £ spent (Return on investment)	£45.03	£77.59	<b>£52.50</b>

'Value per £' shows how much money was generated for each marketing pound spent.

**The table shows that English Riviera 2013 marketing activity overall generated an estimated £52.50 for each marketing pound spent.**

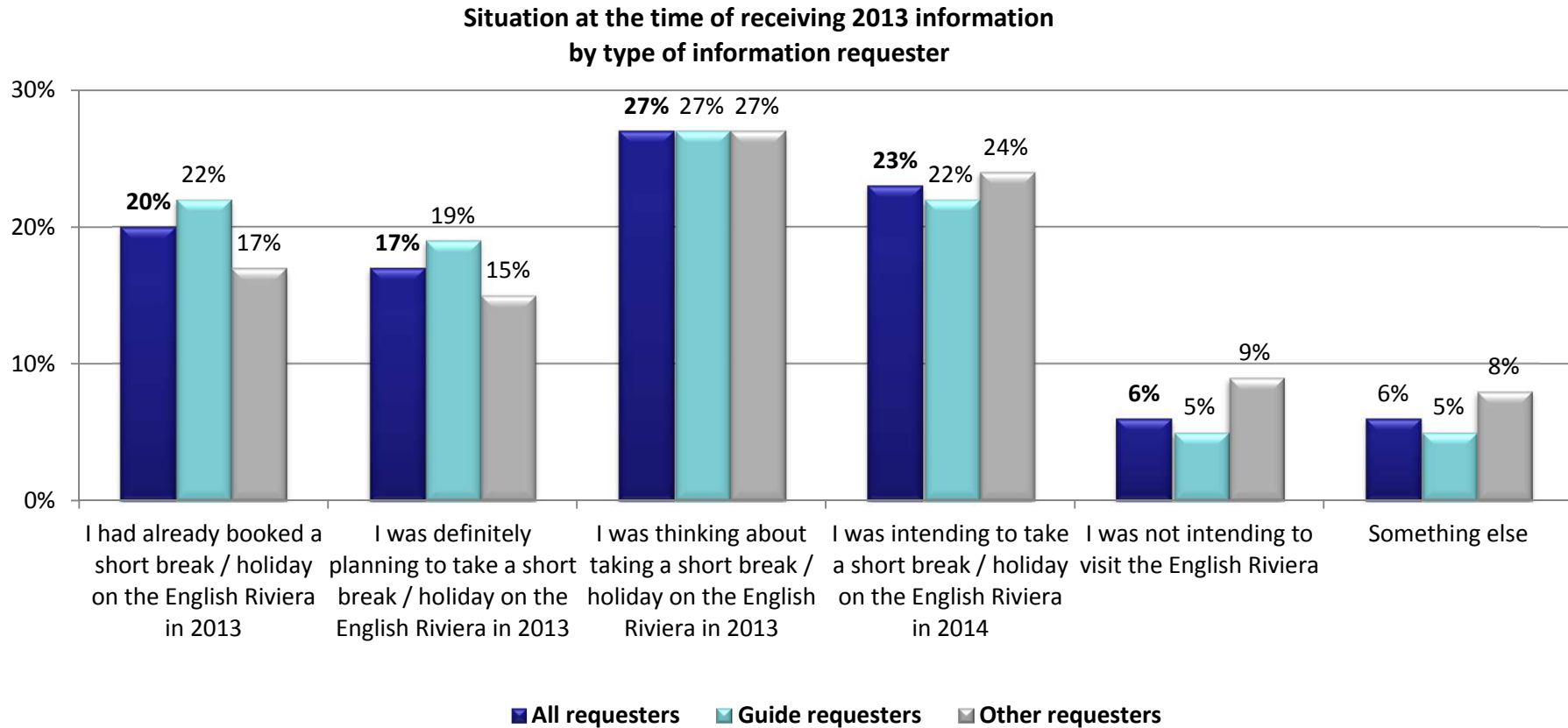
## Through a visitor guide and the English Riviera website were the most recalled sources of visitor information

Recall of source relating to visitor information – other marketing activity respondents only			
Through a visitor guide	49%	Word of mouth	5%
Through the <a href="http://www.englishriviera.co.uk">www.englishriviera.co.uk</a> website	49%	Other	5%
Through an e-newsletter	23%	Saw it on a TV programme	4%
Saw an advertisement in a newspaper/magazine	17%	Don't know/can't recall	4%
Information through a tourist information centre (TIC)	12%	On street poster advertising	2%
Through another website	11%	English Riviera video	2%
English Riviera Facebook site	8%	English Riviera Twitter feed	1%

49% of respondents in each case recalled sourcing information through a visitor guide and/or the English Riviera website. 23% recalled receiving information via an e-newsletter. Newspapers/magazines (17%) and tourist information centres (12%) were the next most recalled sources of visitor information.

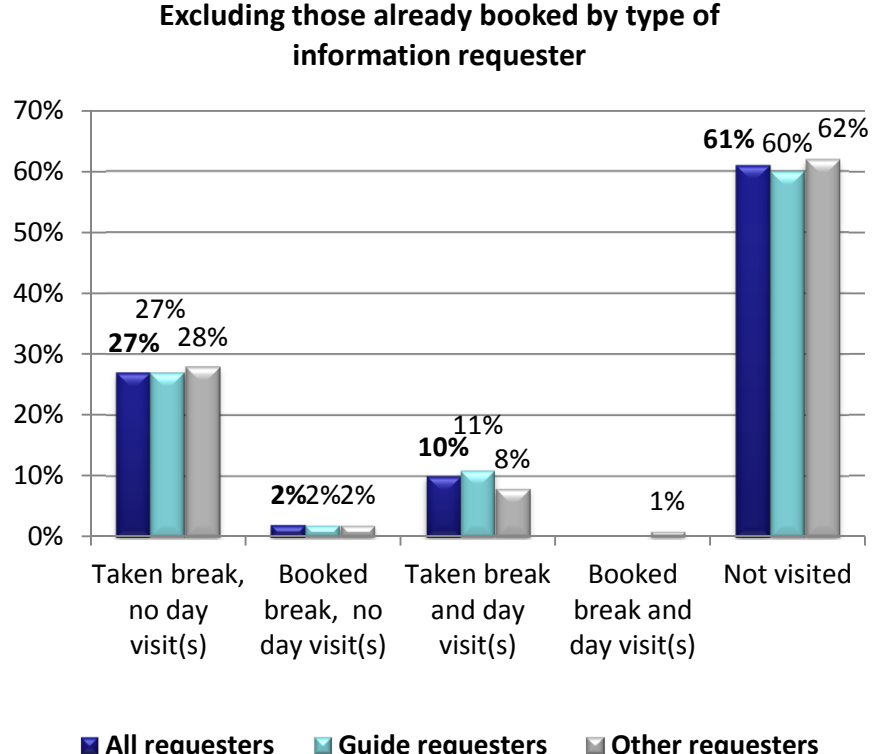
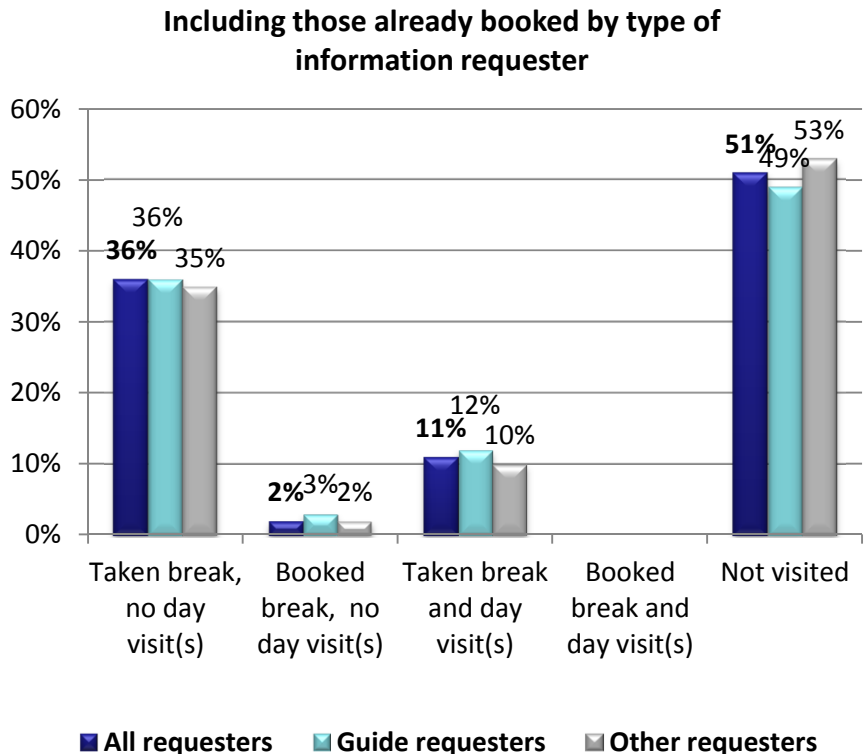


# 20% of all requesters had already booked a visit to the English Riviera at the time of receiving the 2013 visitor information.



At the time of receiving the 2013 visitor information 20% of all requesters had already booked a visit to the English Riviera including 22% of guide requesters and 17% of other information requesters. A further 17% were definitely planning to visit the resort in 2013 (19% and 15% of guide and other information requesters respectively), 27% were thinking of visiting in 2013 (no difference according to requester type) and 23% were intending to visit in 2014 including 22% of guide requesters and 24% of other information requesters.

# 49% of respondents had either taken or booked a holiday or taken a day visit on the English Riviera at the time of the survey

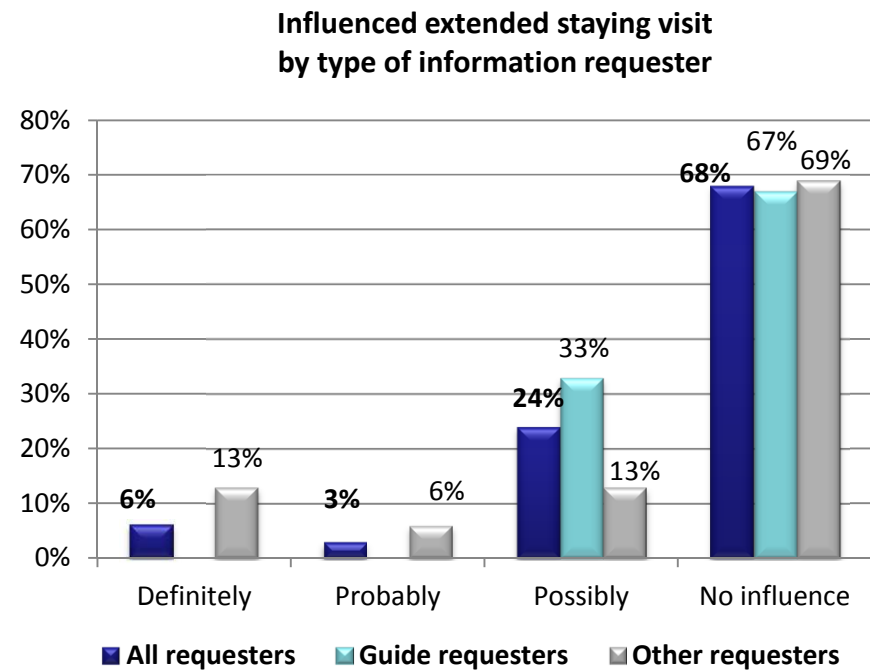
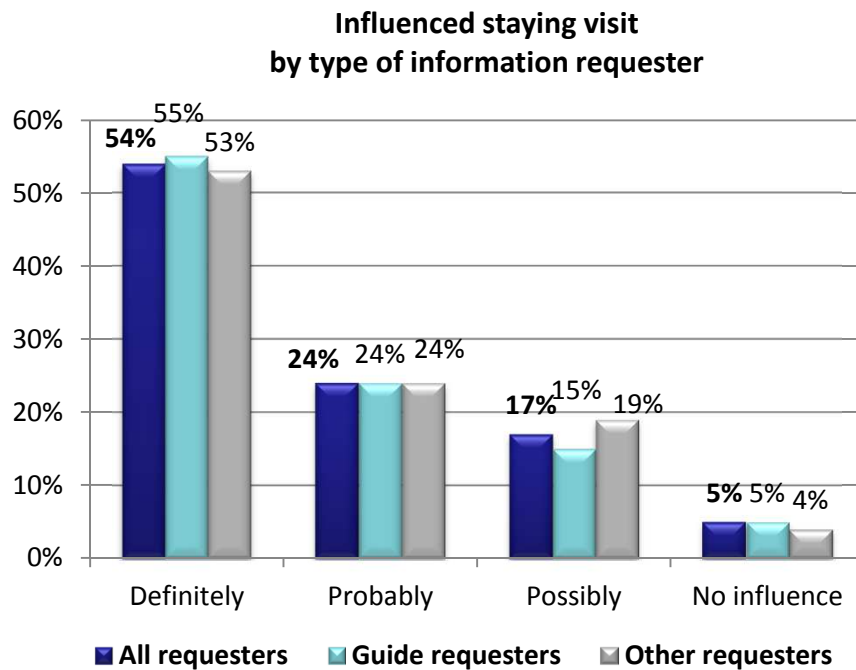


Analysis of all requesters shows that 49% had taken or booked a holiday or taken a day visit at the time of interview including 51% of guide requesters and 47% of other information requesters. However, when those that had already booked a holiday in the English Riviera prior to exposure to the 2013 visitor information were excluded from the analysis the proportion reduces to 39% of the remaining respondents who had taken or booked a holiday or taken a day visit to the English Riviera (including 40% of guide requesters and 38% of other information requesters).

**The visitor figures given in the remainder of this report refers to only those requesters that had not booked prior to receiving or sourcing any information unless otherwise specified.**

# 95% of those taking holidays stated that the 2013 visitor information or any subsequent visits to the English Riviera website had a degree of influence in their decision to visit the resort

Respondents who had taken or booked a break on the English Riviera were asked if the 2013 visitor information or the website had turned a possible visit into a certainty with the possible responses being 'definitely', 'probably', 'possibly', 'not at all' or 'don't know'.



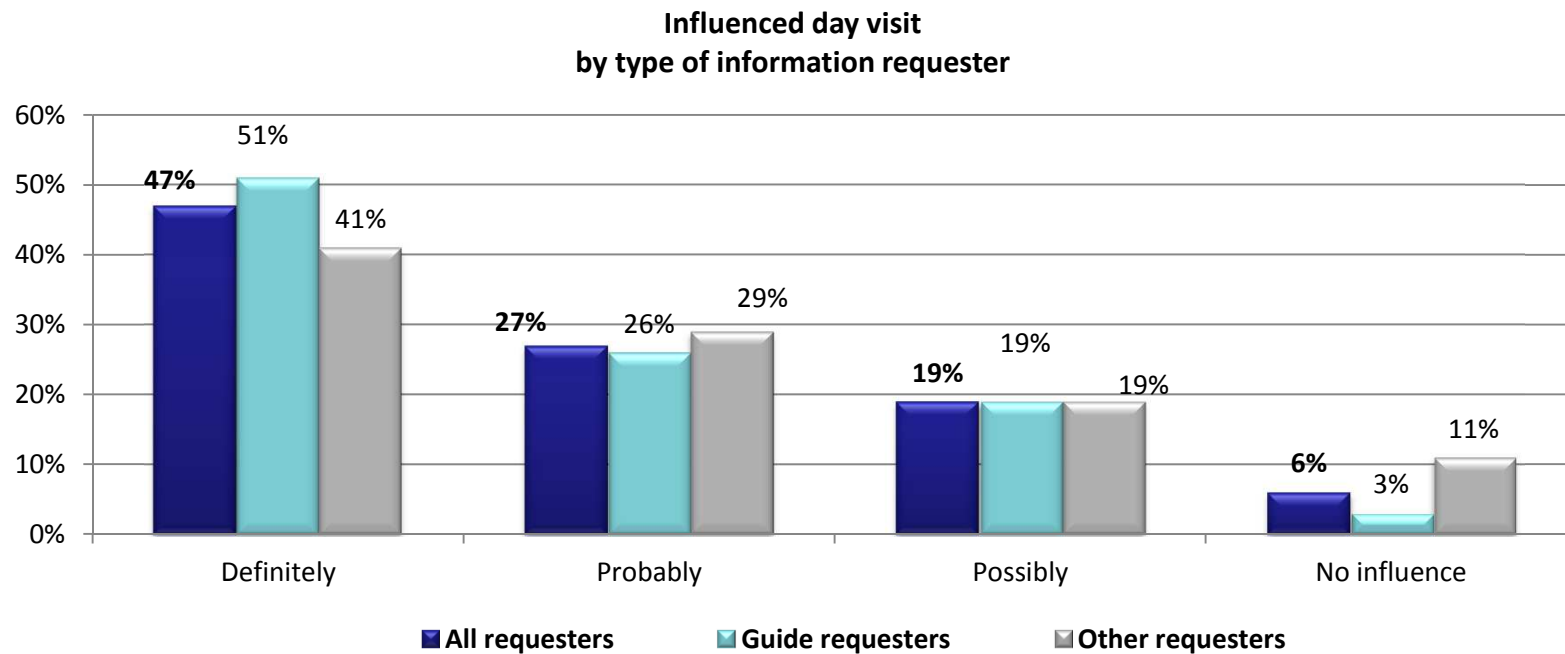
There was little variation in the levels of influence according to the type of information requester.

Of those not influenced to visit the English Riviera by the 2013 visitor information, 32% were influenced to extend their visit to the English Riviera.

Levels of influence were defined in two stages. Firstly, all respondents that had taken or booked a holiday were asked about the influence of the 2013 visitor information. Respondents not influenced by the information that had subsequently used the English Riviera website were asked about the influence of the information on the site. All respondents that were definitely, probably or possibly influenced by either communication method have been included as influenced visitors.

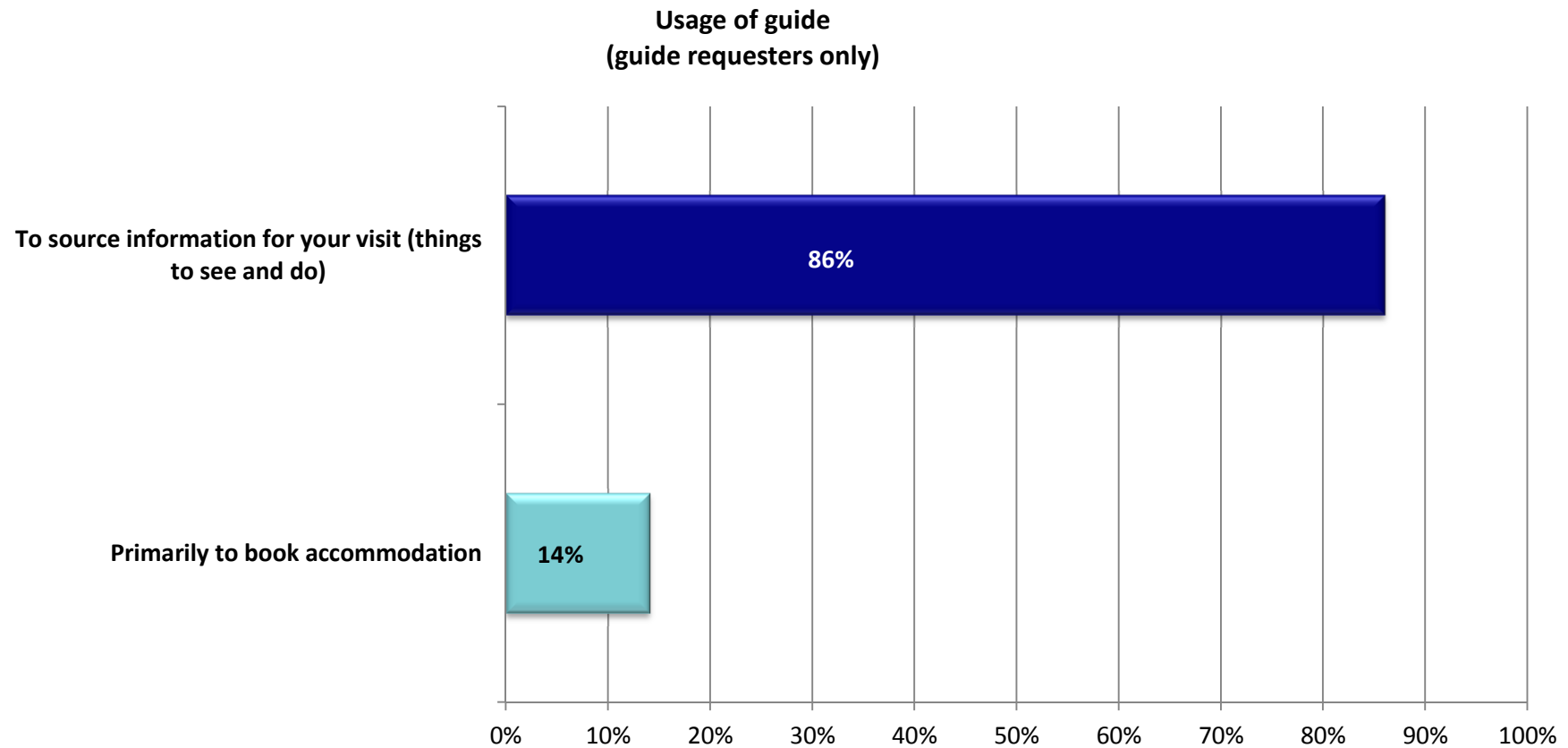
# 94% of those taking day visits stated that the 2013 visitor information or any subsequent visits to the English Riviera website had a degree of influence in their decision to visit the resort

Respondents who had taken a day visit in the English Riviera were asked if the 2013 visitor information or the website had turned a possible visit into a certainty with the possible responses being 'definitely', 'probably', 'possibly', 'not at all' or 'don't know'.



In a similar manner to requesters that had taken or booked a holiday, those respondents taking day visits were asked about the degree of influence of the information that they had received and/or seen on the website. Firstly, all respondents that had taken a day visit were asked about the influence of the 2013 visitor information. Respondents not influenced by the information that had subsequently used the English Riviera website were asked about the influence of the information on the site. All respondents that were definitely, probably or possibly influenced by either communication method have been included as influenced visitors.

# The primary usage of the English Riviera Destination Guide was to source information

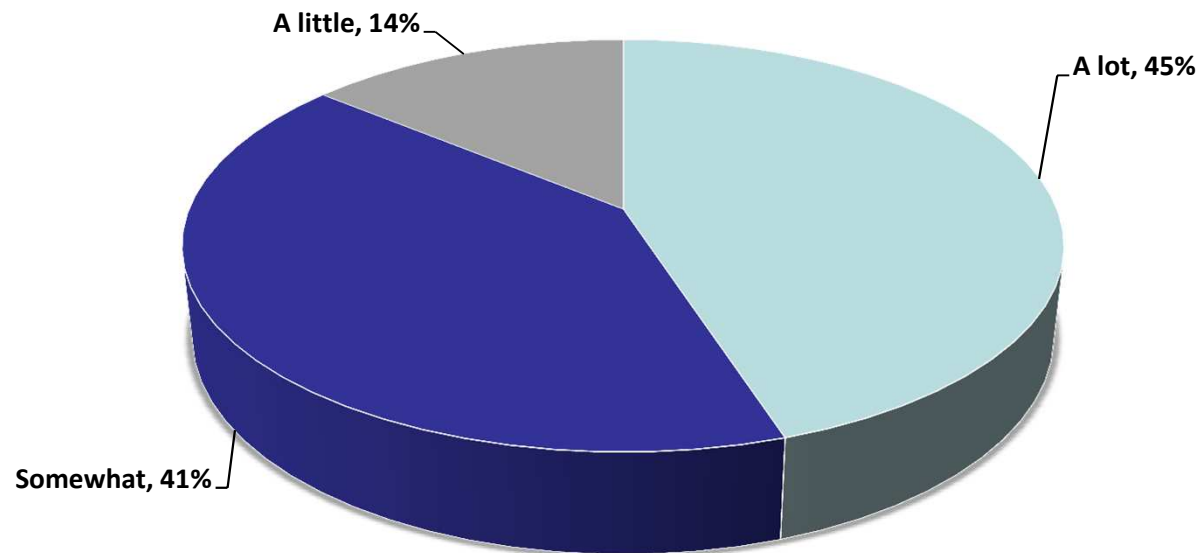


For 14% of guide requesters the primary usage was to book accommodation.

*Please note that these results include all guide requesters who had taken or booked a holiday or taken a day visit on the English Riviera regardless of whether they had already booked their trip at the time they received the information.*

# 45% of guide requesters indicated that it had helped them 'a lot' in planning their visit to the English Riviera

Usefulness of the 2013 guide



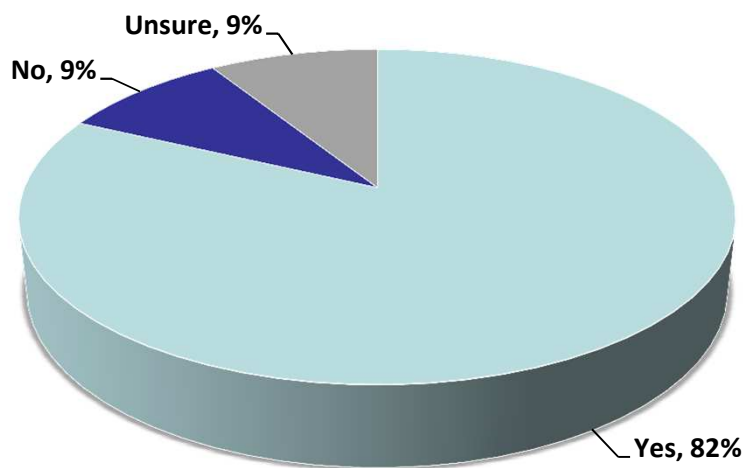
Guide requesters were asked how much they felt it had helped them in planning their visit to the resort.

45% said it had helped them 'a lot' and a further 41% 'somewhat'. Only 14% said that it had not helped them at all.

*Please note that these results include all guide requesters who had taken or booked a holiday or taken a day visit in the English Riviera regardless of whether they had already booked their trip at the time they received the information.*

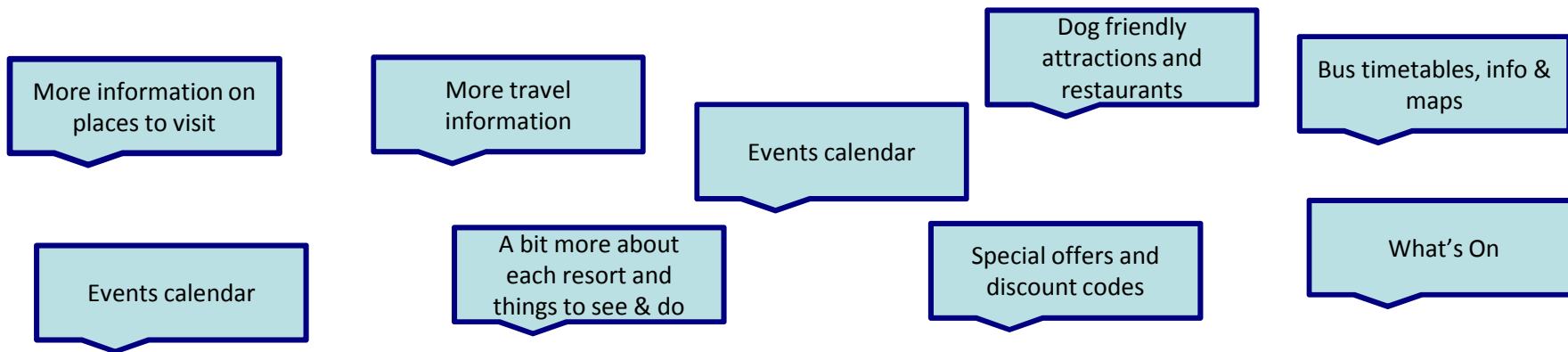
# 82% of guide requesters stated that the 2013 guide provided all of the information that they were looking for

Was all information provided?



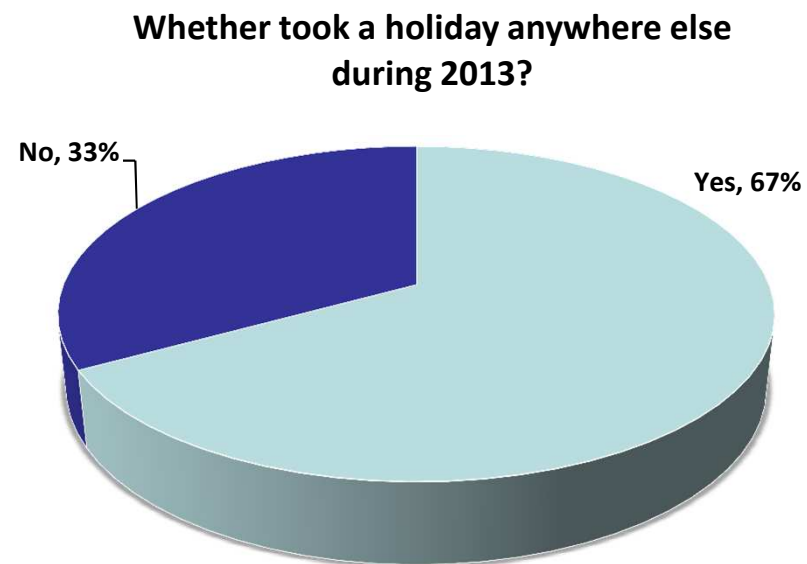
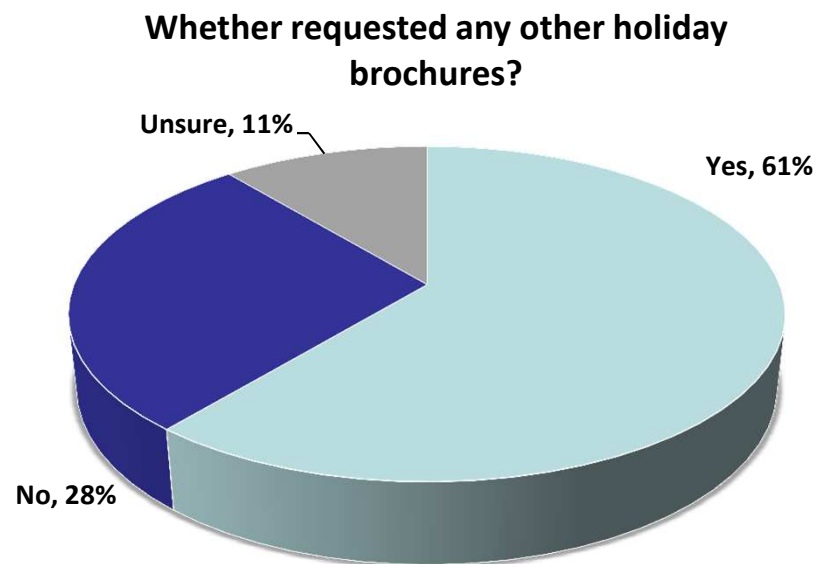
The large majority of guide requesters felt it provided all of the information that they were looking for indicating that the current format provides a comprehensive information source for visitors that they find easy to use.

Those respondents who felt that the 2013 Guide did not provide all of the information that they required, or were unsure, were asked what further information would be useful to them. A sample of comments provided are shown below.



Please note that these results include all guide requesters who had taken or booked a holiday or taken a day visit in the English Riviera regardless of whether they had already booked their trip at the time they received the information.

## The majority of guide requesters had requested other holiday brochures and taken a holiday somewhere else during 2013



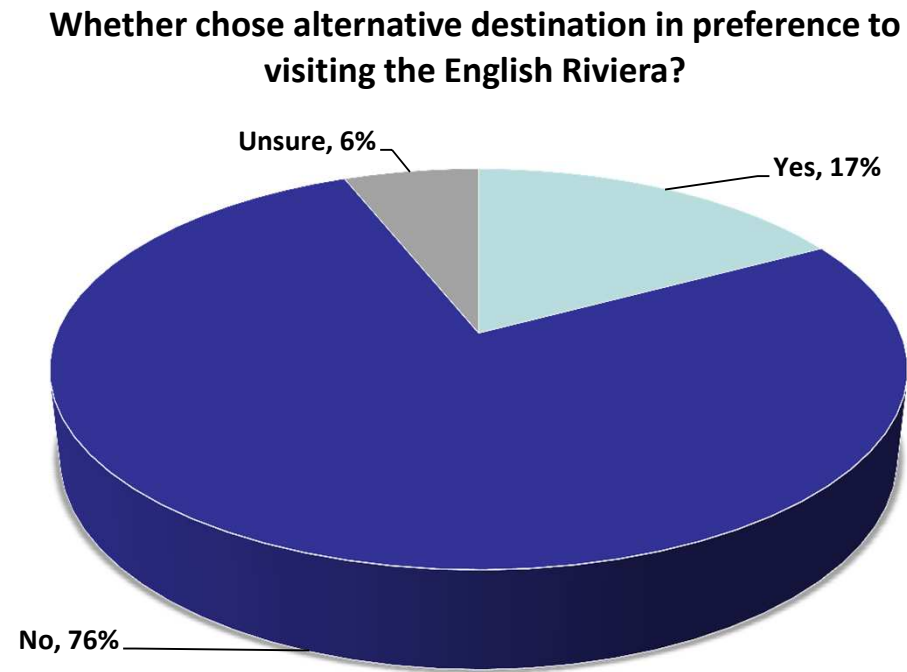
The majority of the other destination brochures requested were for other UK destinations including Cornwall, Devon, Dorset, the Isle of Wight, the Lake District, Norfolk, Yorkshire, Scotland and Wales.

A full list of the other destination brochures requested can be found in the appendices which accompanies this report.

*Please note that these results include all guide requesters who had taken or booked a holiday or taken a day visit in the English Riviera regardless of whether they had already booked their trip at the time they received the information.*



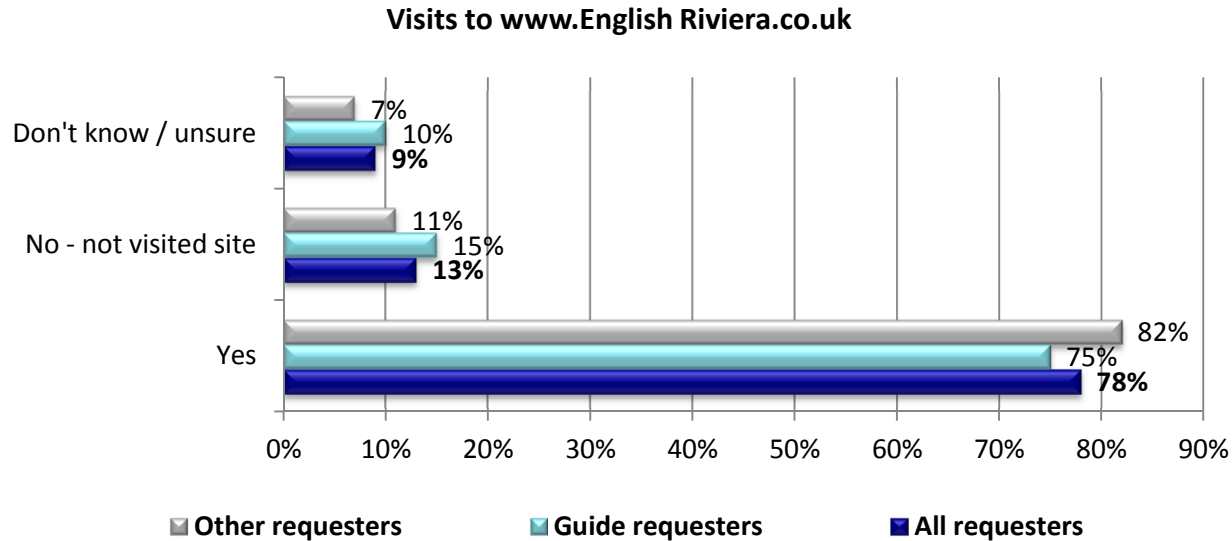
## Only 17% of guide requesters had chosen an alternative destination in preference to visiting the English Riviera



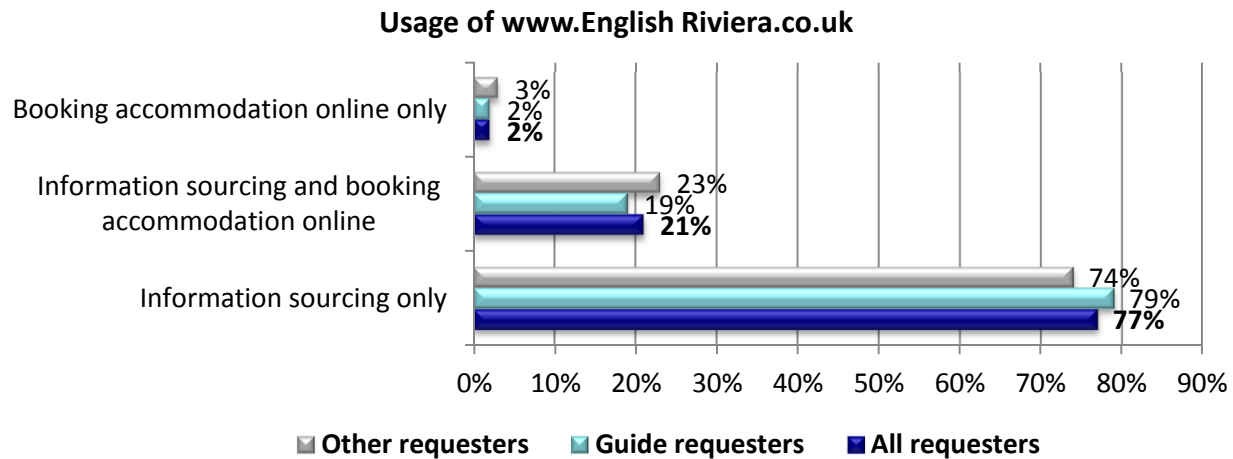
Whilst the majority of guide requesters had also requested brochures for other destinations and taken a holiday elsewhere during 2013, only 17% had done so in preference to visiting the English Riviera.

*Please note that these results include all guide requesters who had taken or booked a holiday or taken a day visit in the English Riviera regardless of whether they had already booked their trip at the time they received the information.*

# 82% of all visitors had visited the English Riviera website



78% of all requesters had visited the English Riviera website including 75% of guide requesters and 82% of other information requesters.



Almost all requesters using the website used it to source information for their visit only (77%), including 79% of guide requesters and 74% of information requesters.

Please note that these results include all requesters who had taken or booked a holiday or taken a day visit in the English regardless of whether they had already booked their trip at the time they received the information.

## Holiday/day visit statistics

Influenced holiday statistics	All requesters	Guide requesters	Other requesters
Average holidays taken/booked	1.38	1.48	1.24
Average number of nights per holiday taken/booked – MOST RECENT	5.83	5.70	6.03
Average number of nights per holiday taken/booked – SECOND	5.11	5.86	3.87
Average number of nights per holiday taken/booked – COMBINED	5.68	5.73	5.59
Average number of people – Holidays taken/booked – MOST RECENT	2.78	2.80	2.75
Average number of people – Holidays taken/booked – SECOND	2.89	3.12	2.50
Average number of people – Holidays taken/booked – COMBINED	2.80	2.87	2.68

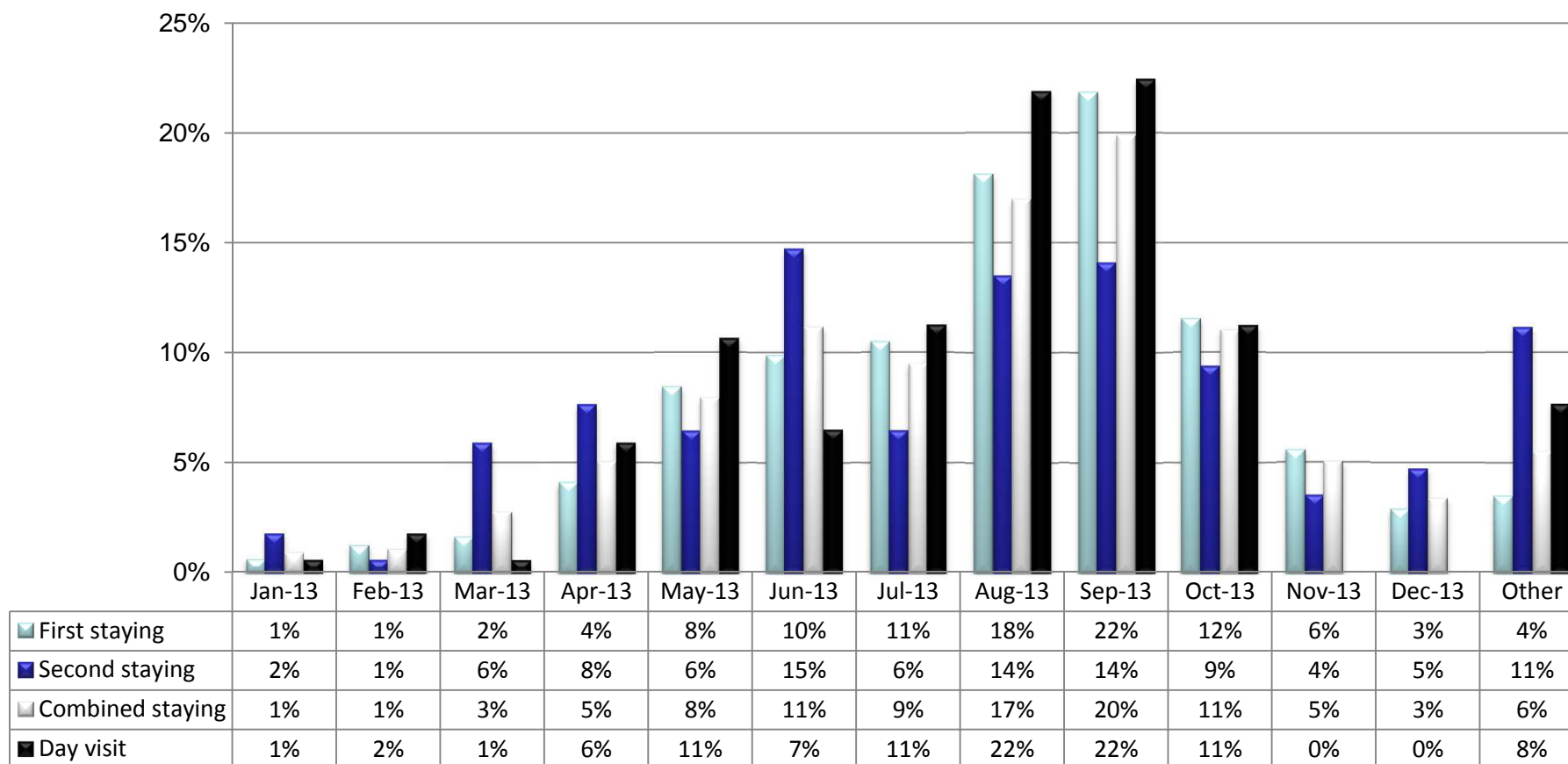
Influenced day visit statistics	All requesters	Guide requesters	Other requesters
Average number of days visits	2.96	2.40	3.81
Average number of people	2.80	2.85	2.73
Average duration (hours)	5.61	5.88	5.25

An average of 1.38 holidays were taken or booked in the English Riviera amongst visitors influenced by the information they had received. The average number of nights for all influenced holidays was 5.68 with the average number of people being 2.80.

An average of 2.96 day visits were taken amongst those visitors influenced by the information with an average of 2.80 persons per visit for an average duration of five hours and thirty seven minutes.

*Please note that these results exclude the 20% of all requesters who had already taken or booked a holiday or taken a day visit in the English Riviera at the time they received the information.*

## Month of holiday taken/booked and day visits for all visitors



29% of all staying visits combined were taken before the peak period of July/August when a further 26% of all holidays were taken. 39% of all holidays were taken between September to December with the remaining 6% booked for months other than during 2013.

28% of day visits were taken before the July/August peak period, 33% were taken during the peak period with a further 33% taken between September and December. 8% of day visits were planned/booked for months other than during 2013.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the English regardless of whether they had already booked their trip at the time they received the information.*

## Half of all visitors chose serviced accommodation for their holiday

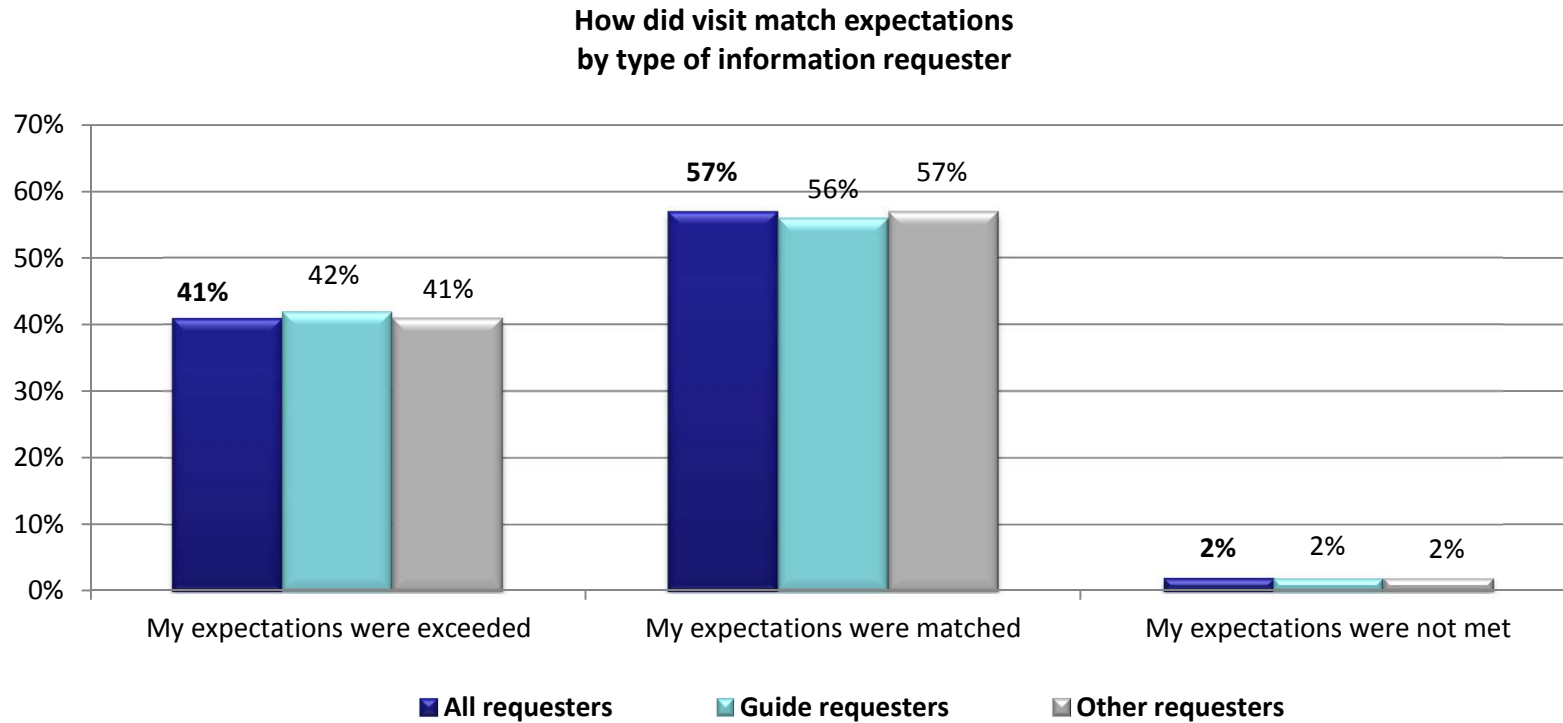
All accommodation used	Most recent			Second			Combined		
	All requesters	Guide requesters	Other requesters	All requesters	Guide requesters	Other requesters	All requesters	Guide requesters	Other requesters
Hotel	37%	36%	40%	38%	33%	47%	<b>38%</b>	35%	42%
B&B/guest house	13%	13%	14%	10%	11%	8%	<b>12%</b>	12%	12%
Holiday centre/park/camp	11%	13%	9%	10%	12%	6%	<b>11%</b>	13%	8%
Self catering holiday home	23%	24%	21%	17%	20%	13%	<b>22%</b>	23%	19%
Static caravan - owned/rented	6%	5%	7%	11%	12%	10%	<b>7%</b>	7%	8%
Camping	1%	1%	1%	1%	1%	2%	<b>1%</b>	1%	1%
Touring Caravan	4%	3%	5%	5%	4%	6%	<b>4%</b>	3%	6%
Second home	1%	0%	1%	2%	1%	3%	<b>1%</b>	1%	2%
Friends/relatives	2%	3%	2%	2%	1%	2%	<b>2%</b>	2%	2%
Youth Hostel / Hostel	0%	0%	-	-	-	-	<b>0%</b>	0%	0%
Other	1%	1%	1%	3%	3%	2%	<b>1%</b>	2%	1%

Half of all visitors chose serviced accommodation for their visit (38% Hotel and 12% B&B/Guest House), with self catering accommodation (22%) and a holiday centre/park/camp (11%) being the next most popular choices. Respondents did not provide details of the other accommodation used.

41% of visitors booked holidays with accommodation providers featured in the 2013 Accommodation Guide.

*Please note that these results include all respondents who had taken or booked a holiday or taken a day visit in the English regardless of whether they had already booked their trip at the time they received the information.*

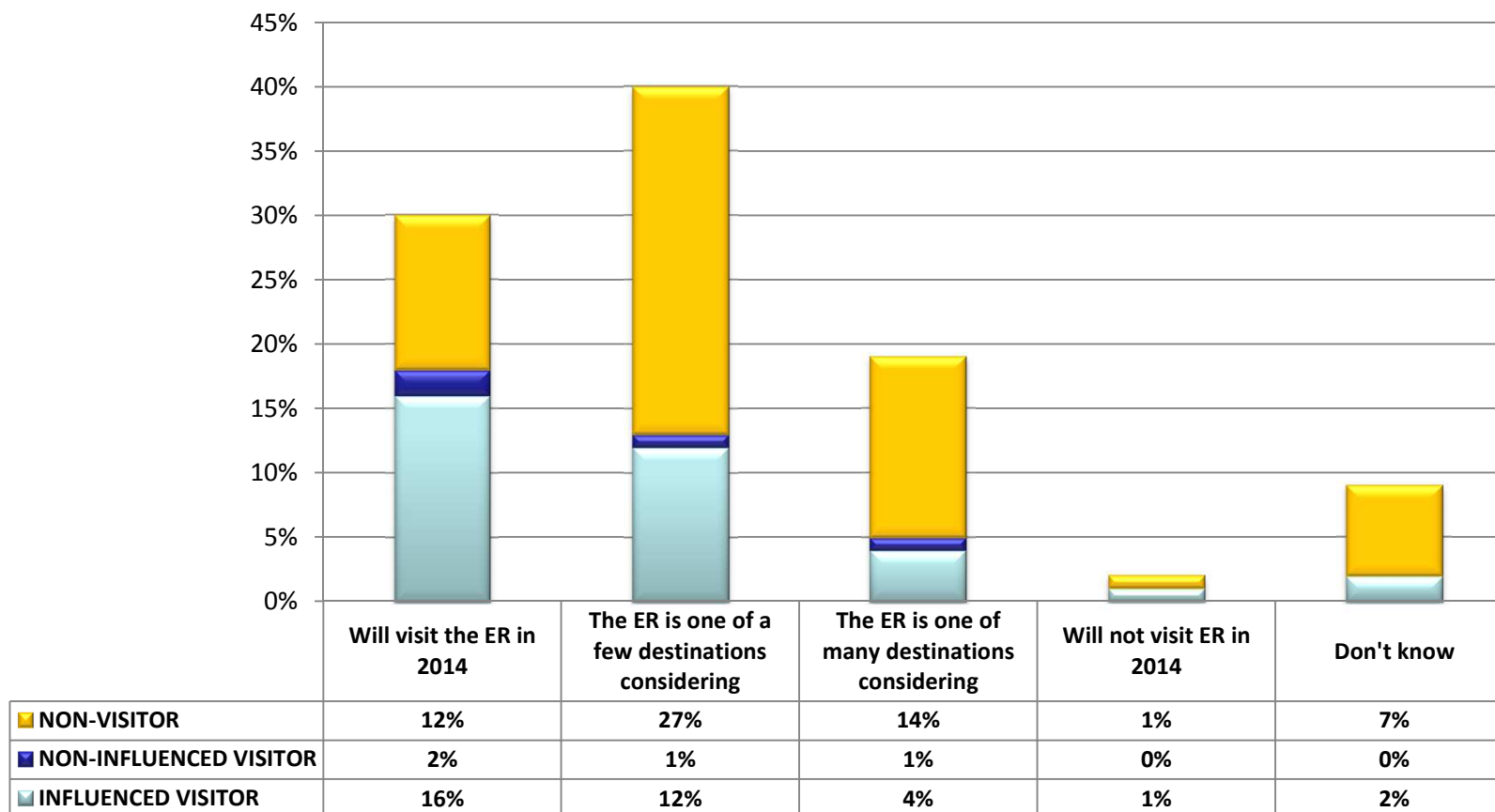
# 41% of all visitors stated that their expectations were exceeded



57% of visitors stated that their visit to the English Riviera matched their expectations including 56% of guide requesters and 57% of other information requesters. However, more importantly, 41% of visitors had their expectations exceeded (42% of guide requesters and 41% of other requesters) – an important driver for business growth through repeat visits and word of mouth recommendation. Only 2% of visitors stated that their expectations were not met.

*Please note that these results include all respondents who had already taken a holiday or day visit in the English Riviera at the time of completing the survey.*

## Just 2% of all respondents have ruled out visiting the resort in 2014



30% of respondents have already decided to visit the English Riviera in 2014 with 60% of these being repeat visitors from 2013. Whilst only 2% of all respondents have ruled out the English Riviera as a destination to visit in 2014 there is clearly some work to be done to convert possible visits into actual visits in the year ahead with 40% considering the English Riviera as one of a few destinations being considered and 19% considering the resort along with many other destinations.

*Please note that these results include all respondents who indicated in the survey that they would consider visiting the English Riviera in the future (93% of all respondents).*

# 93% of all respondents were from the UK



The remaining 7% were from overseas. The table below details UK origin by respondent type. South East (16%), South West and West Midlands (15% each) and North West (11%) provided the largest proportions of respondents.

Region/Country	All requesters	Guide requesters	Other requesters
East of England	7%	7%	7%
London	5%	5%	4%
East Midlands	9%	11%	8%
North East	3%	3%	3%
North West	11%	11%	10%
South East	16%	16%	17%
South West	15%	14%	17%
West Midlands	15%	16%	14%
Yorkshire and The Humber	8%	8%	8%
Scotland	3%	3%	4%
Wales	6%	4%	7%
Northern Ireland	1%	1%	1%



## 60% of all respondents were aged 55+, 51% were female

Age of respondent	All requesters	Guide requesters	Other requesters
16 - 24 years	1%	1%	0%
25 - 34 years	3%	3%	3%
35 - 44 years	12%	12%	12%
45 - 54 years	23%	23%	22%
55 - 64 years	30%	28%	33%
65 years or over	30%	31%	28%
I'd rather not answer this	1%	1%	1%

Gender of respondent	All requesters	Guide requesters	Other requesters
Male	49%	49%	48%
Female	51%	51%	52%