

English Riviera Tourism Company

2014 Marketing Evaluation

Draft Report

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

October 2014



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Summary Report – Background and methodology

In 2013, the English Riviera attracted approximately 1.1 million staying visits from UK and overseas visitors combined with just under 3.6 million day visits generating an estimated £445 million pounds worth of visitor related spend for the local economy. Approximately 12,700 jobs within the resort are tourism related representing 22% of all employment.

The English Riviera Tourism Company (ERTC) produces a Destination Guide (2014 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, both staying and day visitors. The 2014 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 2014 guide. More than 58,000 copies of the 2014 guide were distributed to requesters with over 37,000 of them providing email addresses.

The ERTC commissioned this research to better understand the impact that their 2014 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 2014 visitor information to help inform campaigns for the future. Another particular requirement of the project was to provide valuable information on the monies generated and the return on investment returned by a number of marketing media sources used to generate guide requests in 2014 to help inform where marketing budgets were to be invested in 2015.

In addition to the guide, potential visitors also received visitor information relating to the English Riviera through e-newsletters distributed by the ERTC during 2014. Whilst these contacts were not surveyed as part of this evaluation an estimate of the likely value of 2014 ERTC internet based marketing activity has also been made in this report using data gathered during 2013 alongside 2014 website statistics.

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had requested a copy of the 2014 guide and provided their email address to gather details of how the guide 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.

	Guide Requesters	Internet Unique Visits Estimates	Total
Value of influenced holidays/day visits	£9,231,385	£5,466,431	£14,697,816
Added value of extended influenced holidays	£50,147	£62,117	£112,263
Total influenced value	£9,281,531	£5,528,548	£14,810,080

An estimated £14.8 million pounds was influenced through the English Riviera 2014 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 this equates to 296 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.

	Guide Requesters	Internet Unique Visits Estimates	Combined
Marketing spend	£160,000	£85,000	£245,000
Value per £ holiday/day visit influenced	£57.70	£64.31	£59.99
Value per £ extended holiday influenced	£0.31	£0.73	£0.46
Combined value per £ spent (Return on investment)	£58.01	£65.04	£60.45

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

The table shows that English Riviera 2014 marketing activity overall generated an estimated £60.45 for each marketing pound spent.

Summary Report - Key Results – Combined Overview

The combined results for those requesting the guide 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.

	Guide Requesters	Internet Unique Visits Estimates	Total
Number of influenced holidays	10,094	6,509	16,603
Value of influenced holidays	£11,560,492	£6,742,943	£18,303,435
Value per influenced holiday	£1,145	£1,036	£1,102
Number of extended holidays	270	191	461
Added value of extended holidays	£65,125	£80,671	£145,797
Added value per extended holiday	£241	£422	£316
Number of influenced day visits	6,440	3,704	10,104
Value of influenced day visits	£428,320	£356,318	£784,638
Value per influenced day visit	£67	£96	£77
Total value of influenced holidays/visits	£12,053,937	£7,179,933	£19,233,870

Summary Report - Those Receiving the 2014 Guide

- 80% of all respondents recalled receiving the English Riviera 2014 Destination Guide.
- At the time of receiving the 2014 guide 25% of all requesters had already booked a visit to the English Riviera.
- 59% of respondents had either taken or booked a holiday or taken a day visit on the English Riviera at the time of the survey.
- 86% of those taking holidays and 9% of those taking day visits stated that the 2014 guide or any subsequent visits to the English Riviera website had a degree of influence in their decision to visit the resort.
- The primary usage amongst all visitors using the accommodation guide was to source information.
- 46% of guide requesters indicated that it had helped them 'a lot' in planning their visit.
- 79% of guide requesters felt that it had provided all of the information that they were looking for.
- The majority of guide requesters not visiting the English Riviera (53%) had requested other holiday brochures and 64% had taken a holiday somewhere else during 2014.
- Of those not visiting the English Riviera and taking a holiday elsewhere only 19% had chosen an alternative destination in preference to visiting the English Riviera.
- Approximately three quarters of visitors (74%) used the English Riviera website with 85% using it to solely to source information for their visit.
- An average of 1.3 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 5.63 with the average number of people being 2.90.
- An average of 1.9 day visits were taken amongst those visitors influenced by the information with an average of 3.09 persons per visit for an average duration of five hours and forty one minutes.
- 78% of all staying visits and 80% of day visits were taken between January and August 2014.

Summary Report - Those Receiving the 2014 Guide

- 51% of all visitors chose serviced accommodation for their visit (35% Hotel and 16% B&B/Guest House) with self catering accommodation (22%) and a holiday centre/park/camp (12%) being the next most popular choices.
- 44% of visitors booked holidays with accommodation providers featured in the 2014 guide.
- 42% of all staying and day visitors combined stated that their expectations were exceeded when visiting the English Riviera.
- Just 1% of all respondents have ruled out visiting the English Riviera in 2015.
- All respondents were from the UK with the South East (19%), South West and West Midlands (16% each) and North West (10%) providing the largest proportions of respondents.

Summary Report – Conclusions

In summary, another successful year for ERTC marketing activity is demonstrated by this report which generated in excess of £14.8 million pounds in direct visitor expenditure for the resort and provided a very healthy return of approximately £60 for every pound invested in marketing (increased from a return on investment of £53 in 2013). It should be remembered that this return is that which is classed as influenced by the marketing activity (may not have occurred without it) and represents a proportion of the overall spend of visitors using English Riviera marketing information.

The 2014 Destination Guide was well received by users and whilst there are further considerations for improvements to be made moving forward, the indications are that the guide provides a very comprehensive and easy to use information source for visitors to the resort and also influences them to visit. The demand for quality printed literature remains clear, although it is often used alongside the English Riviera website to inform and book holidays.

Indeed, there is also a marked increase on both the value and the return on investment achieved by the 2014 guide only activity (£9.3m visitor expenditure and £58 generated per pound invested) compared with £7.6m visitor expenditure and £45 generated per pound invested in 2013 and £6.2m visitor expenditure and £35 generated per pound invested in 2011. This suggests continued improvement by the ERTC in how they reach, communicate and influence consumers to holiday in the resort.

Introduction – Background

In 2013, the English Riviera attracted approximately 1.1 million staying visits from UK and overseas visitors combined with just under 3.6 million day visits generating an estimated £445 million pounds worth of visitor related spend for the local economy. Approximately 12,700 jobs within the resort are tourism related representing 22% of all employment.

The English Riviera Tourism Company (ERTC) produces a Destination Guide (2014 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, both staying and day visitors. The 2014 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 2014 guide. More than 58,000 copies of the 2014 guide were distributed to requesters with over 37,000 of them providing email addresses.

The ERTC commissioned this research to better understand the impact that their 2014 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 2014 visitor information to help inform campaigns for the future. Another particular requirement of the project was to provide valuable information on the monies generated and the return on investment returned by a number of marketing media sources used to generate guide requests in 2014 to help inform where marketing budgets were to be invested in 2015.

In addition to the guide, potential visitors also received visitor information relating to the English Riviera through e-newsletters distributed by the ERTC during 2014. Whilst these contacts were not surveyed as part of this evaluation an estimate of the likely value of 2014 ERTC internet based marketing activity has also been made in this report using data gathered during 2013 alongside 2014 website statistics.

The main basis for the evaluation work was achieved through an online questionnaire with consumers who had requested a copy of the 2014 guide and provided their email address to gather details of how the guide 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 the English Riviera 2014 Destination Guide 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 2014 guide in deciding to visit the resort; consumers' use of the English Riviera website (www.englishriviera.co.uk).

The online survey was issued to all contacts held in the English Riviera email contact database during September 2014.

A total of 1,049 useable survey responses were received, 840 of which recalled receiving the 2014 guide, 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 2014 guide and individual marketing media were.

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 2014 guide is defined as respondents who stated that the 2014 guide or any subsequent visits to the English Riviera website 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 2014 guide were asked the same question to establish if the information or the website 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 (1,049) (Margin % +/-)	All respondents recalling the information (840) (Margin % +/-)	All respondents visiting (502) (Margin % +/-)
10% or 90%	+/- 1.8%	+/- 2.0%	+/- 2.6%
20% or 80%	+/- 2.4%	+/- 2.7%	+/- 3.5%
30% or 70%	+/- 2.8%	+/- 3.1%	+/- 4.0%
40% or 60%	+/- 3.0%	+/- 3.3%	+/- 4.3%
50%	+/- 3.0%	+/- 3.4%	+/- 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 47.0% to % 53.0%.

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 2014 guide (30,334 contacts) show that: -

A total of 7,970 holidays were **taken or booked** and influenced by the information.

With a total value of £9,128,167

Equating to a value of £1,145 per holiday.

A further 213 holidays were **extended** due to the influence of the information.

With a total value of £51,423.

Equating to an added value of £241 per holiday extended.

A total of 5,085 day visits were **taken** and influenced by the information.

With a total value of £338,201.

Equating to a value of £67 per day visit.

Resulting in a value of £9,517,792 which is attributable to the 2014 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 – 20,207

Of which;

80% recalled receiving information (same as the guide survey sample) – 16,166

Survey findings applied to one in two (50%) of these requesters assumed to have acted in line with survey sample – 8,083

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 2,124 holidays were **taken or booked** and influenced by the information.

With a total value of £2,432,324.

Equating to a value of £1,145 per holiday.

A further 57 holidays were **extended** due to the influence of the information.

With a total value of £13,702.

Equating to an added value of £241 per holiday extended.

A total of 1,355 day visits were **taken** and influenced by the information.

With a total value of £90,118.

Equating to a value of £67 per day visit.

Resulting in a value of £2,536,145 which is attributable to guide requesters without email contacts.

Key Results - The wider value of www.englishriviera.co.uk

The English Riviera website www.englishriviera.co.uk was a key element of the English Riviera 2014 Marketing Campaign with all aspects of the marketing containing details of the website address. In 2014 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.

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. It should be noted that the survey ratios applied to this section are from data gathered regarding website usage during 2013.

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) – 81,366

Less;

Total requests for guide that had visited website – 18,250

Total remaining – 63,116

Survey findings applied to one in two (50%) of these unique visitors assumed to have acted in line with survey sample – 31,558

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 6,973 holidays were **taken or booked** and influenced by the website information.

With a total value of £7,223,300.

Equating to a value of £1,036 per holiday.

A further 205 holidays were **extended** due to the influence of the website information.

With a total value of £86,418.

Equating to an added value of £422 per holiday extended.

A total of 3,968 day visits were **taken** and influenced by the website information.

With a total value of £381,702.

Equating to a value of £96 per day visit.

Resulting in an estimated value of £7,691,420 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	10,094	6,509	16,603
Value of influenced holidays	£11,560,492	£6,742,943	£18,303,435
Value per influenced holiday	£1,145	£1,036	£1,102
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Value of influenced day visits	£428,320	£356,318	£784,638
Value per influenced day visit	£67	£96	£77
Total value of influenced holidays/visits	£12,053,937	£7,179,933	£19,233,870

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.

	Guide Requesters	Internet Unique Visits Estimates	Total
Value of influenced holidays/day visits	£9,231,385	£5,466,431	£14,697,816
Added value of extended influenced holidays	£50,147	£62,117	£112,263
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An estimated £14.8 million pounds was influenced through the English Riviera 2014 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 this equates to 296 FTE's supported by the marketing activity.

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.

	Guide Requesters	Internet Unique Visits Estimates	Combined
Marketing spend	£160,000	£85,000	£245,000
Value per £ holiday/day visit influenced	£57.70	£64.31	£59.99
Value per £ extended holiday influenced	£0.31	£0.73	£0.46
Combined value per £ spent (Return on investment)	£58.01	£65.04	£60.45

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

The table shows that English Riviera 2014 marketing activity overall generated an estimated £60.45 for each marketing pound spent.

Evaluation of Marketing Media

A further requirement of the 2014 guide evaluation was to provide details on the volume and value of holidays taken by those responding through various marketing media over the course of the year. This would allow for the calculation of a return on investment figure (ROI) for each marketing media source used along with a cost per response (CPR) to allow the ERTC Marketing Team to efficiently plan their 2015 campaign.

Varying size databases were held for each of the media types although there were not sufficient contacts held to generate individual responses for each type. As a result the media types were grouped into three broader groups for the purposes of this project as described below. Generally speaking, all contacts across all media types had been exposed to a similar advert which displayed the 2014 guide and there were no specific demographic targets through any of the media used. As a result it was reasonable to assume that behaviour would have been similar across each of the groups. The analysis also assumes that all non-email contacts requesting information have acted in the same way as those providing email addresses.

The groups used for this part of the evaluation were;

- **Direct Mail (DM)** – Covering a total of eight different media types which all generated responses through direct mailings to potential consumers.
- **Internet** - Covering a total of seven different media types which all generated responses through the internet, e-mailings and e-newsletters to potential consumers.
- **Press (PR)** - Covering a total of four different media types which all generated responses advertisements in the press to attract potential consumers. Whilst all contacts for this group were invited to take part only a small number replied, likely as a result of the low number of contacts generated through this media group (approximately 120 contacts). As a result an average of all of the media groups were applied to this group.

The responses from guide requesters in these three groups along with another general group of requesters who had requested the brochure through other methods (internet search, previous visitor etc.) provide the basis for the data contained in this report. However, the results of the marketing media evaluation are purely based upon the total volume and value of holidays generated through the media contacts and do not take any influence into account. These requesters would have been influenced to request a guide through the various media that they were exposed to but the ultimate factor in influencing a holiday is attributed to the actual information that they saw in the 2014 guide or any subsequent visits to the English Riviera website.

Evaluation of Marketing Media

The first stage of the calculation for the media groups was to reduce the response numbers for each using survey data to include only those that recalled requesting and/or receiving the guide. This would ensure that the value of holidays was not an over estimate.

Survey data for the proportion of those taking/booking holidays was then applied to the revised response rate along with the average numbers of holidays taken/booked, the average length of stay and the average number of people for each of the media groups. This allowed for a calculation of the total number of visitor nights spent on the English Riviera to which the average spend per person per night figure of £69.60 was applied (sourced from English Riviera volume and value research 2013).

A similar method was then used to calculate the number of day visits taken with the survey proportion of those taking day visits applied to the revised response rate along with the average number of visits and the average group size. This allowed for a calculation of the total number of visitor days spent on the English Riviera to which the average spend per person per day figure of £35.76 was applied (sourced from English Riviera volume and value research 2013).

The combined total of the value of holidays taken, holidays booked and day visits taken is the total value of holidays shown in the table overleaf.

The ROI figures shown represent the amount returned for every marketing pound invested in each media type and are calculated by dividing the total value of holidays by the total cost of the media type.

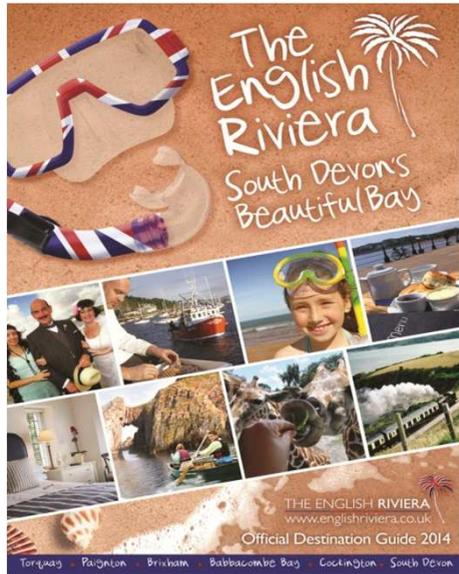
The CPR figures shown represent how much was spent to generate a response for each media type and are calculated by dividing the marketing spend by the total of requests received for each media type.

The analysis demonstrates great variation between the media types and the ROI figures should be used when deciding where to invest 2015 marketing budgets to achieve the greatest return for that investment.

Evaluation of Marketing Media

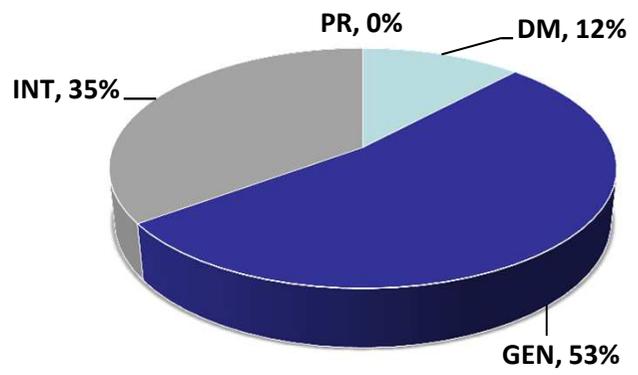
Source	Total requests	Group	Marketing spend	% Recalling guide	REVISED RESPONSE	Value of holidays and day visits	ROI	CPR
Consumer Opinion Poll	7,114	DM	£3,604	73%	5,193	£2,872,760	£797.10	£0.51
UK Holiday Collection 1	2,855	DM	£1,590	73%	2,084	£1,152,900	£725.09	£0.56
Where To Go In Britain	2,057	DM	£1,165	73%	1,502	£830,653	£713.01	£0.57
Holiday Guide Finder	887	DM	£520	73%	648	£358,186	£688.82	£0.59
Planning a UK Holiday	2,812	DM	£1,650	73%	2,053	£1,135,536	£688.20	£0.59
Enjoy a Seaside Holiday	3,009	INTERNET	£1,590	68%	2,046	£1,069,806	£672.83	£0.53
Catalink	4,918	INTERNET	£2,950	68%	3,344	£1,748,522	£592.72	£0.60
UK Seaside Holidays	935	DM	£750	73%	683	£377,570	£503.43	£0.80
UK Holiday Collection 2	1,389	DM	£1,270	73%	1,014	£560,903	£441.66	£0.91
Information Link	9,580	INTERNET	£8,236	68%	6,514	£3,406,028	£413.55	£0.86
Sunday Mirror	491	PRESS	£533	69%	339	£179,458	£336.69	£1.09
Online consumer	2,386	INTERNET	£3,180	68%	1,622	£848,307	£266.76	£1.33
Bitesize Britain	1,021	INTERNET	£2,170	68%	694	£363,001	£167.28	£2.13
Daily Mirror	566	PRESS	£1,288	69%	391	£206,870	£160.61	£2.28
Sunday People	223	PRESS	£533	69%	154	£81,505	£152.92	£2.39
Radio Times Christmas 13	248	PRESS	£1,300	69%	171	£90,643	£69.73	£5.24
Autumn Breaks	43	DM	£750	73%	31	£17,364	£23.15	£17.44
British Destinations	135	INTERNET	£0	68%	92	£47,997	£0.00	£0.00
UK Experience	47	INTERNET	£0	68%	32	£16,710	£0.00	£0.00

80% of respondents recalled receiving the 2014 guide



A total of 1,049 responses were received to the survey. Overall 80% of respondents recalled receiving the 2014 guide, either unprompted or prompted with the brochure image, resulting in 840 usable responses for the purposes of establishing the influence of the guide.

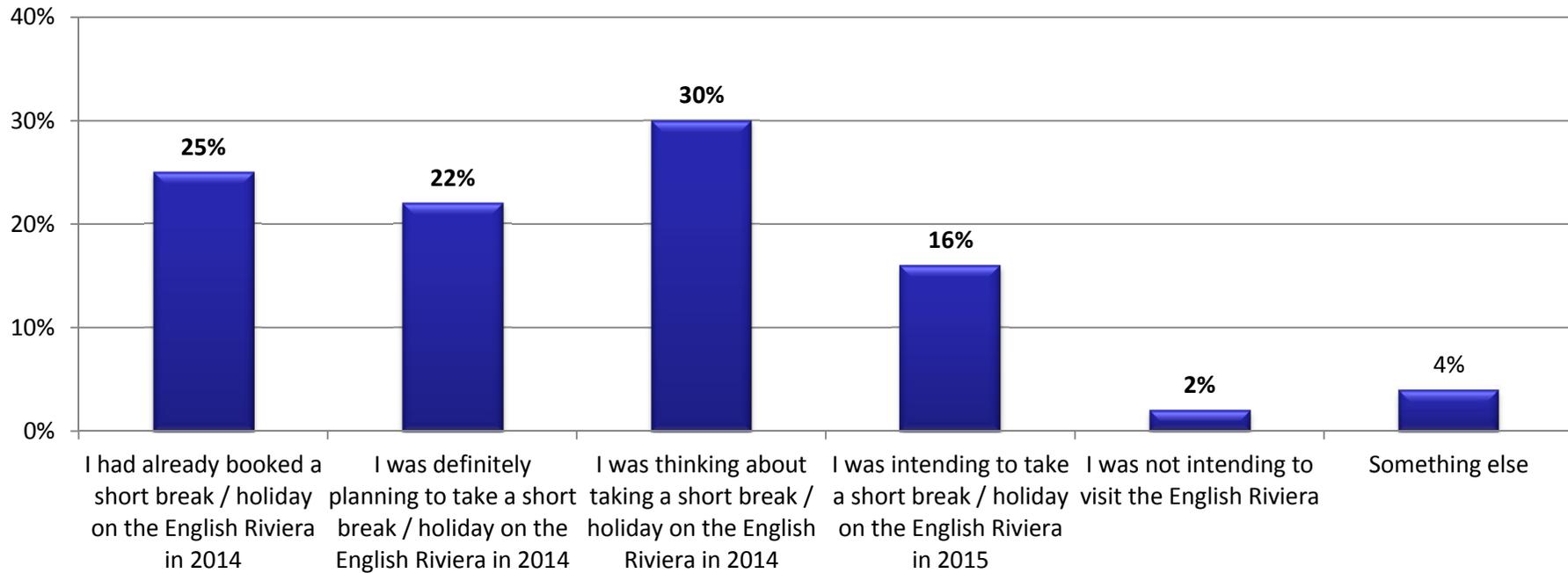
Sample segments



General brochure requesters accounted for the majority of the sample (53%), with Internet requesters (35%) and Direct Mail requesters (12%) making up the remaining 47%.

25% of all requesters had already booked a visit to the English Riviera at the time of receiving the 2014 guide.

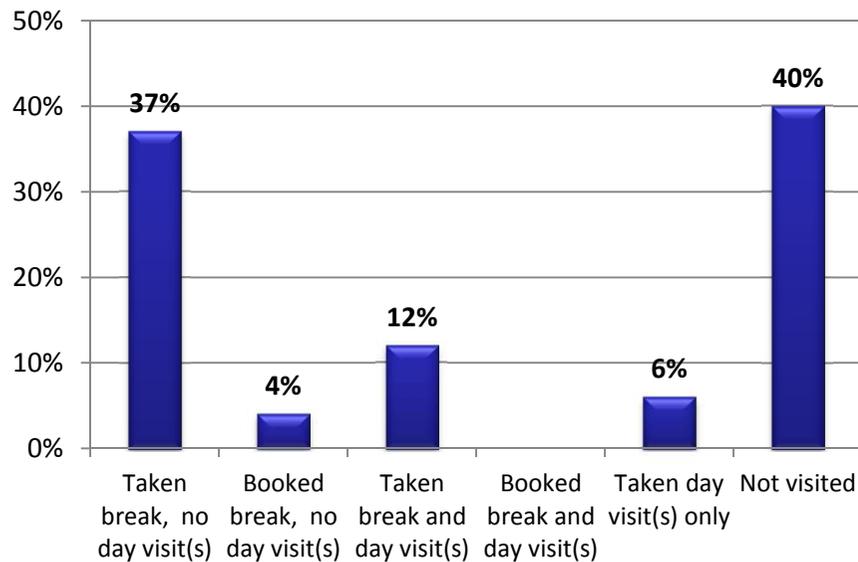
Situation at the time of receiving 2014 guide



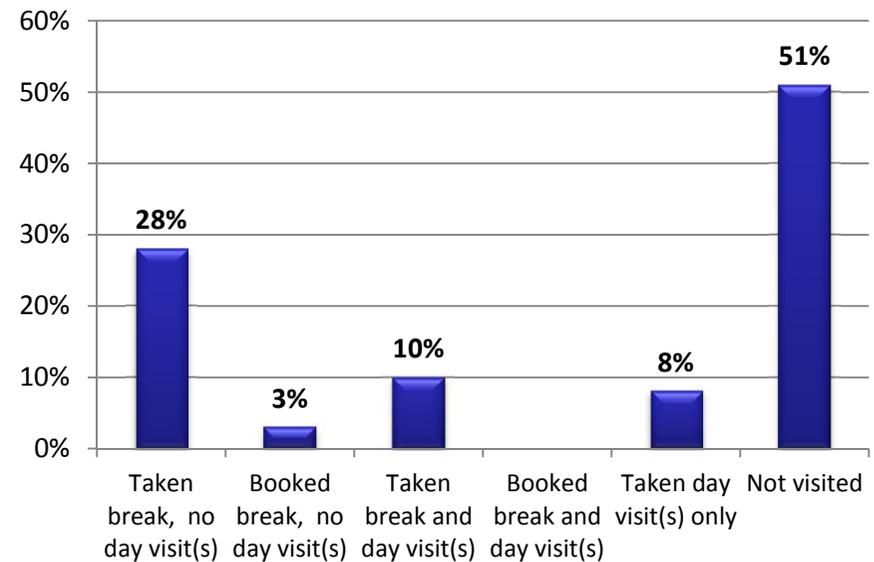
At the time of receiving the 2014 guide 25% of all requesters had already booked a visit to the English Riviera. A further 22% were definitely planning to visit the resort in 2014, 30% were thinking of visiting in 2014 and 16% were intending to visit in 2015.

59% of respondents had either taken or booked a holiday or taken a day visit on the English Riviera at the time of the survey

Including those already booked



Excluding those already booked



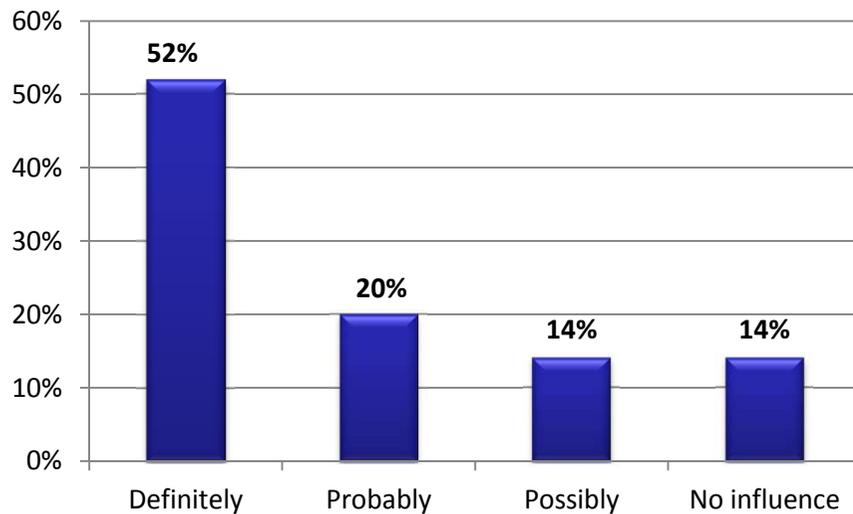
Analysis of all requesters shows that 59% had taken or booked a holiday or taken a day visit at the time of interview. However, when those that had already booked a holiday on the English Riviera prior to exposure to the 2014 guide were excluded from the analysis the proportion reduces to 49% of the remaining respondents who had taken or booked a holiday or taken a day visit to the English Riviera.

The visitor figures given in the remainder of this report refers to only those requesters that had not booked prior to receiving the 2014 guide unless otherwise specified.

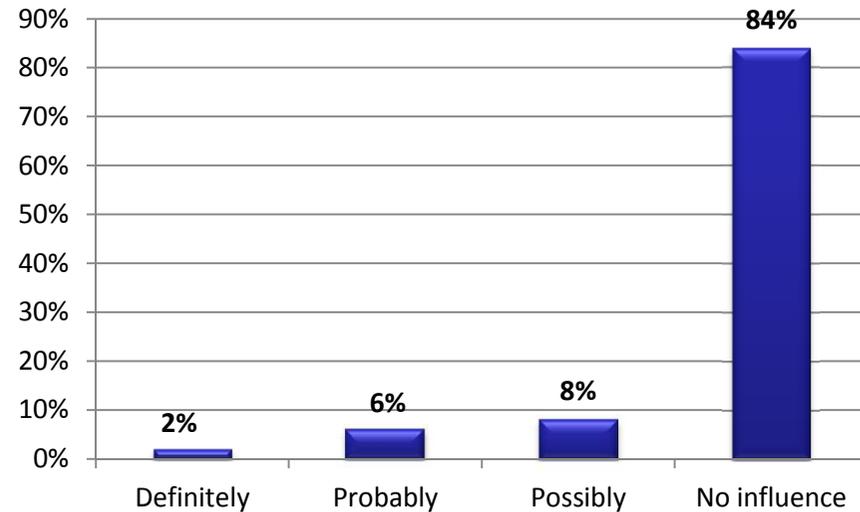
86% of those taking holidays stated that the 2014 guide or any subsequent visits to the English Riviera website had a degree of influence in their decision to visit the resort

Respondents who had taken or booked a break on the English Riviera were asked if the 2014 guide 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'.

Influenced staying visit



Influenced extended staying visit

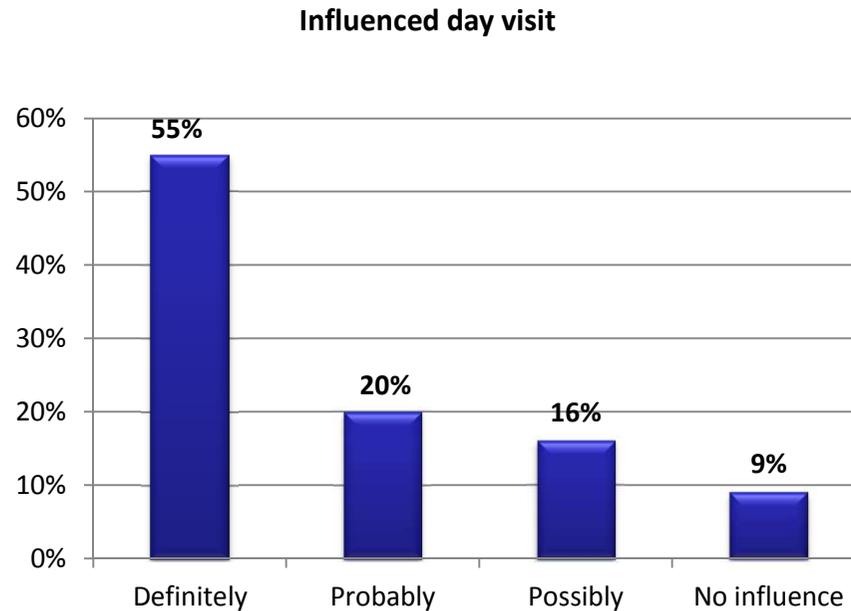


Of those not influenced to visit the English Riviera by the 2014 guide, 16% were influenced to extend their visit to the English Riviera.

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 2014 guide. Respondents not influenced by the guide 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.

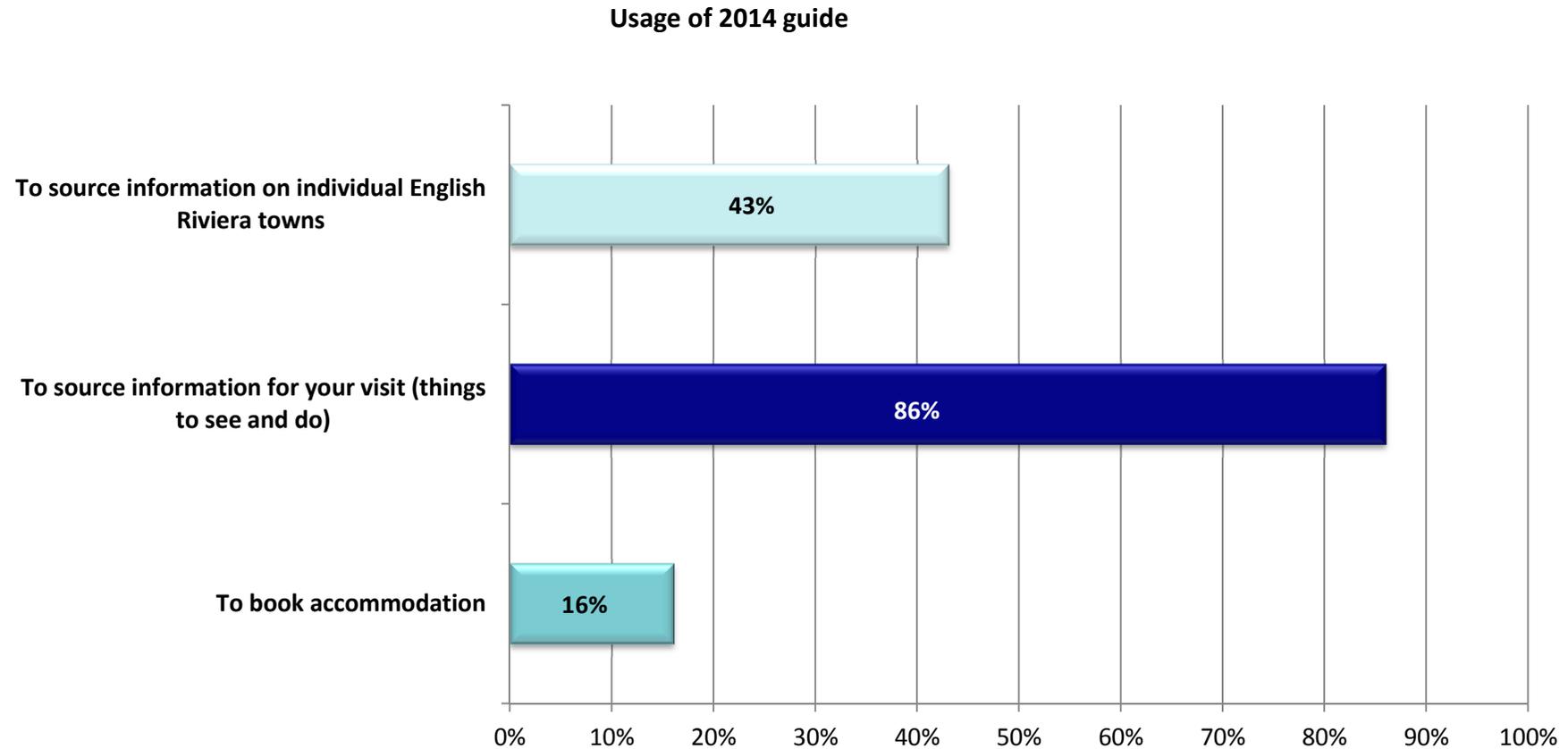
91% of those taking day visits stated that the 2014 guide or any subsequent visits to the English Riviera website had a degree of influence in their decision to visit the resort

Respondents who had taken a day visit in the English Riviera were asked if the 2014 guide 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 guide that they had received or the information they had seen on the website. Firstly, all respondents that had taken a day visit were asked about the influence of the 2014 guide. Respondents not influenced by the guide 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.

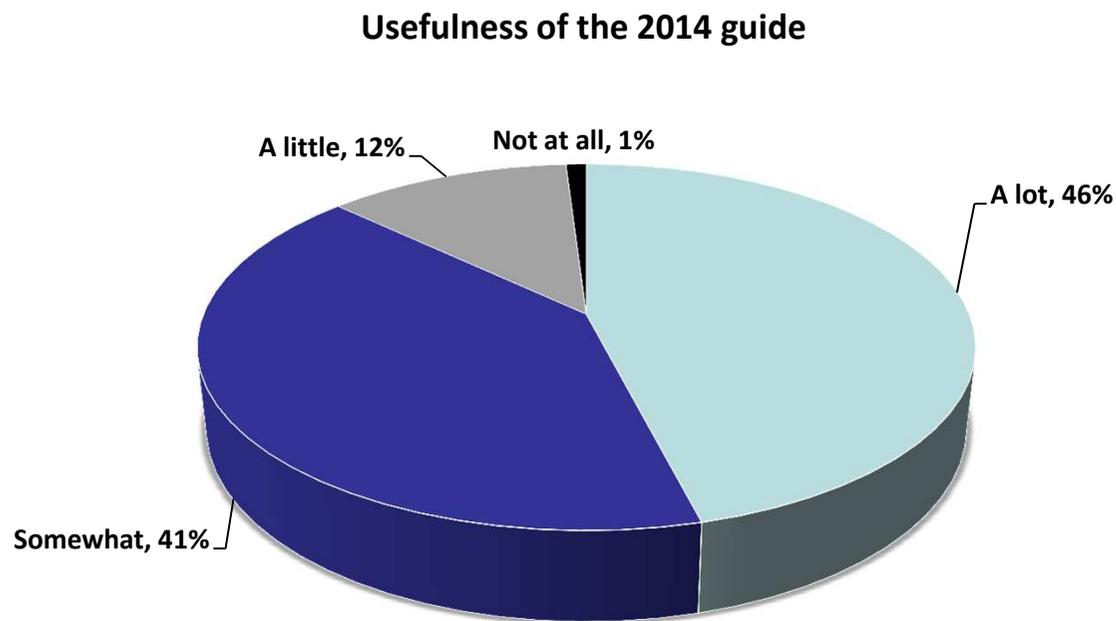
The primary usage of the 2014 guide was to source information on things to see and do



86% of guide requesters used the guide to source information for their visit (things to see and do), 43% used the guide to source information on individual English Riviera towns and 16% used it to book their 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.

46% indicated that the guide had helped them 'a lot' in planning their visit to the English Riviera



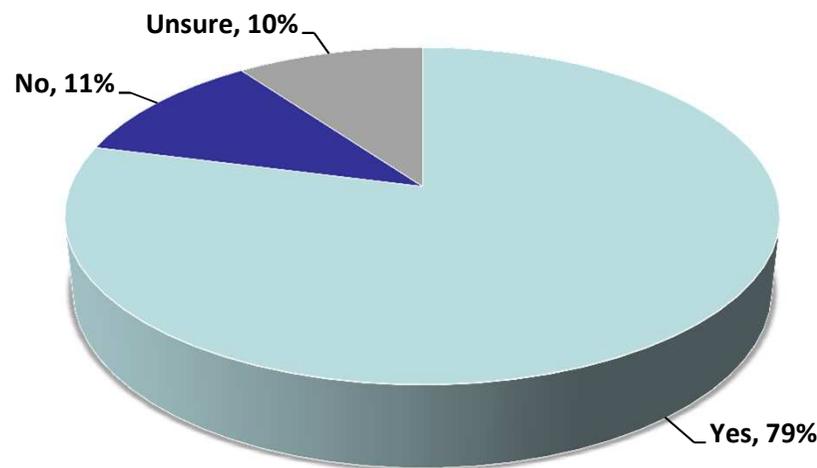
Respondents were asked how much they felt the guide had helped them in planning their visit to the resort.

46% said it had helped them 'a lot', a further 41% 'somewhat' and 12% 'a little'. Only 1% 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.

79% of respondents stated that the 2014 guide provided all of the information that they were looking for

Was all information provided?



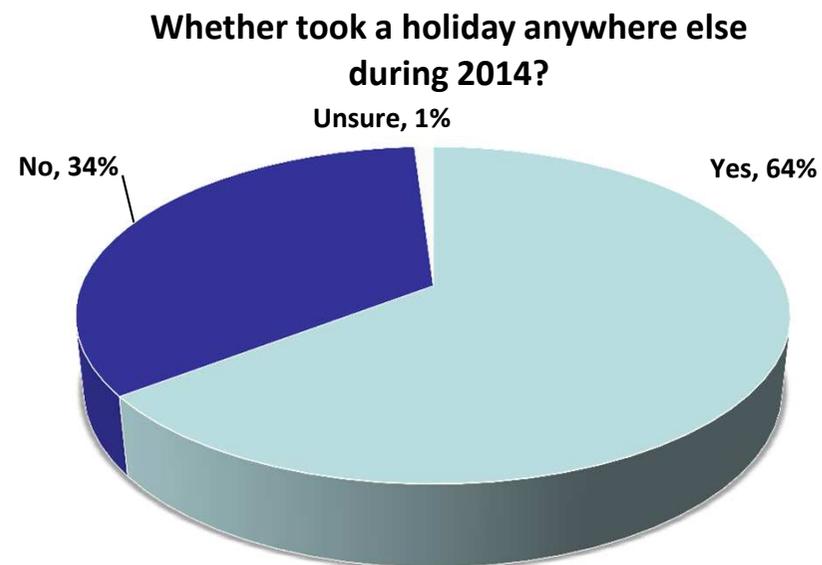
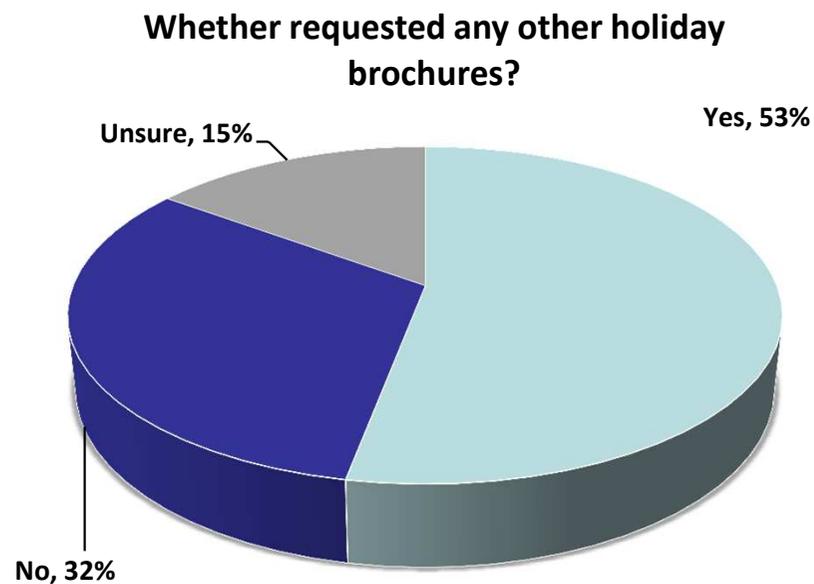
The large majority of guide requesters (79%) felt it provided all of the information that they were looking for indicating that the current format provides a comprehensive information source for visitors that they find easy to use.

Those respondents who felt that the 2014 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.

- A guide to walks and areas to visit for those with physical restrictions who cannot manage steep steps or slopes. Also a list of accommodation with this in mind.
- Bus services and times
- It was very useful but not extensive, local events and beach description with tidal information we gained from other sources.
- Bus timetables, info & maps
- Discount vouchers for attractions - these are otherwise readily available at the TICs so why not in the brochure
- More "insiders' tips" about local attractions, interesting architectural features, some hints on the South West Coast Path, an itinerary...
- Maybe in each town section you could have categories for Historical, Kids, Shopping....

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 those not visiting in 2014 had requested other holiday brochures and taken a holiday somewhere else during 2014



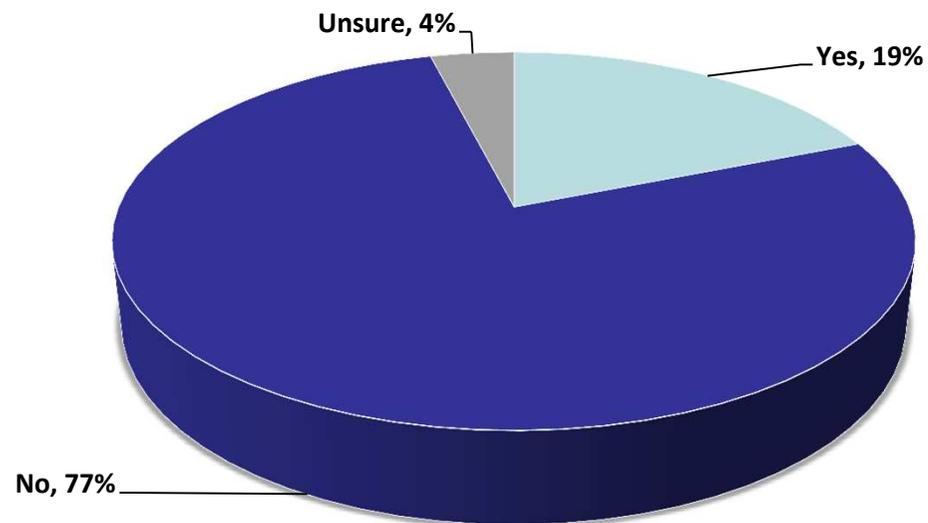
The majority of the other destination brochures requested were for other UK destinations including Cornwall, Devon, Dorset, Bournemouth specifically, the Isle of Wight, Norfolk, Yorkshire, Scotland and Wales.

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 were not visiting the English Riviera in 2014

Only 19% of guide requesters not visiting had chosen an alternative destination in preference to visiting the English Riviera

Whether chose alternative destination in preference to visiting the English Riviera?

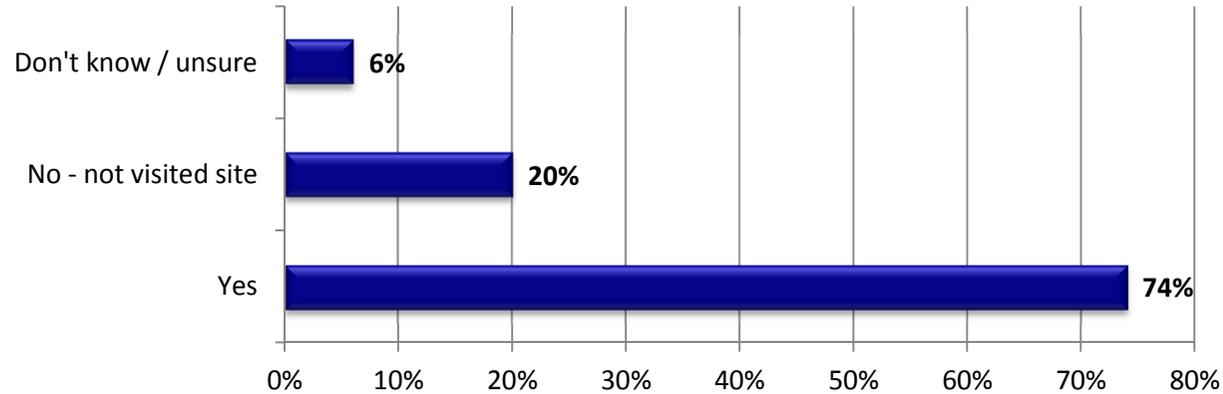


Whilst the majority of guide requesters had also requested brochures for other destinations and taken a holiday elsewhere during 2014, only 19% had done so in preference to visiting the English Riviera.

Please note that these results include all guide requesters who were not visiting the English Riviera in 2014

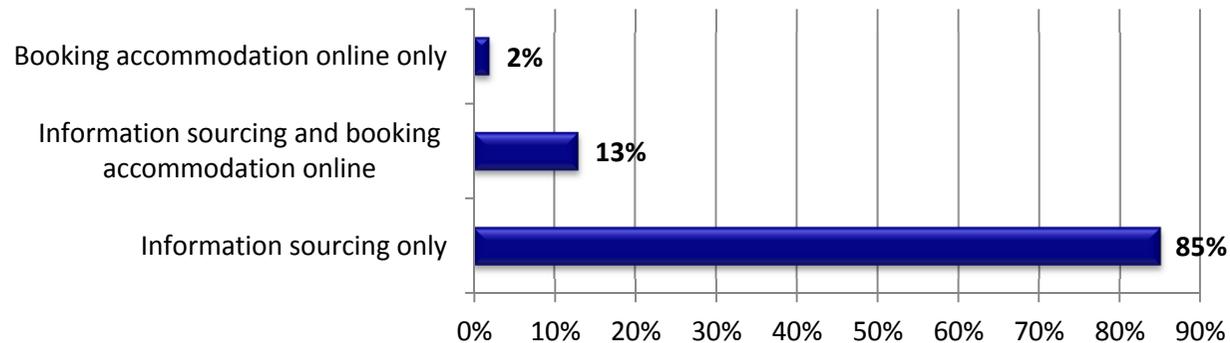
74% of all visitors had visited the English Riviera website

Visits to www.EnglishRiviera.co.uk



74% of all guide requesters visiting the English Riviera in 2014 had visited the English Riviera website and a further 6% were unsure.

Usage of www.EnglishRiviera.co.uk



85% of guide requesters visiting the English Riviera in 2014 using the website used it to source information for their visit only. A further 13% used the site to both source information and to book accommodation and 2% used it to book accommodation only.

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	
Average holidays taken/booked	1.3
Average number of nights per holiday taken/booked – MOST RECENT	5.72
Average number of nights per holiday taken/booked – SECOND	5.12
Average number of nights per holiday taken/booked – COMBINED	5.63
Average number of people – Holidays taken/booked – MOST RECENT	2.98
Average number of people – Holidays taken/booked – SECOND	2.49
Average number of people – Holidays taken/booked – COMBINED	2.90

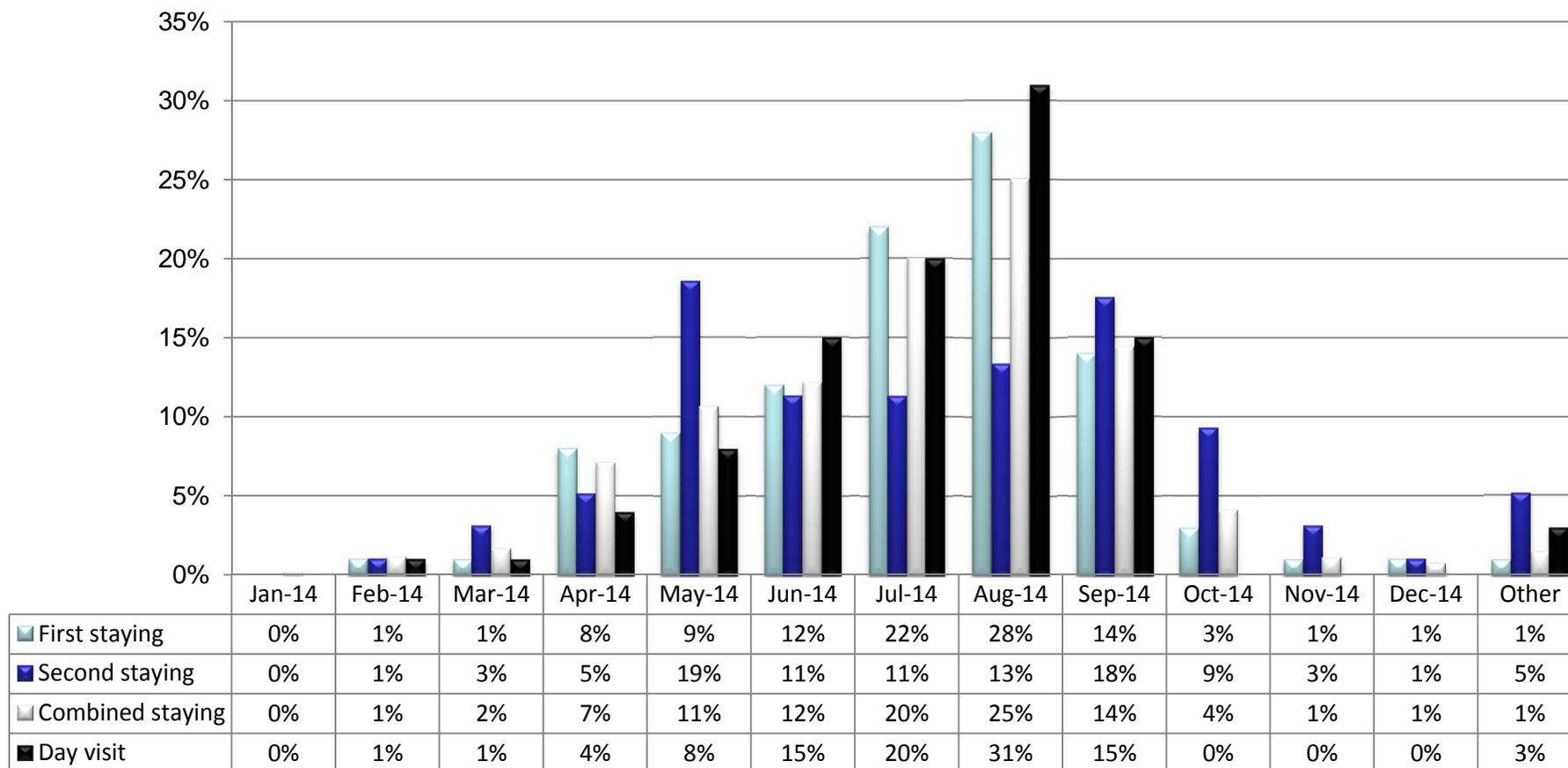
Influenced day visit statistics	
Average number of days visits	1.9
Average number of people	3.09
Average duration (hours)	6.69

An average of 1.3 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 5.63 with the average number of people being 2.90.

An average of 1.9 day visits were taken amongst those visitors influenced by the information with an average of 3.09 persons per visit for an average duration of five hours and forty one minutes.

Please note that these results exclude the 25% 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



33% of all staying visits combined were taken before the peak period of July/August when a further 45% of all holidays were taken. 21% of all holidays were taken/booked between September to December with the remaining 1% booked for months other than during 2014.

29% of day visits were taken before the July/August peak period, 51% were taken during the peak period with a further 15% taken in September. 3% of day visits were planned/booked for months other than during 2014. Day visits for October to December were not captured due to the timing of the survey.

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.

51% of all visitors chose serviced accommodation for their holiday

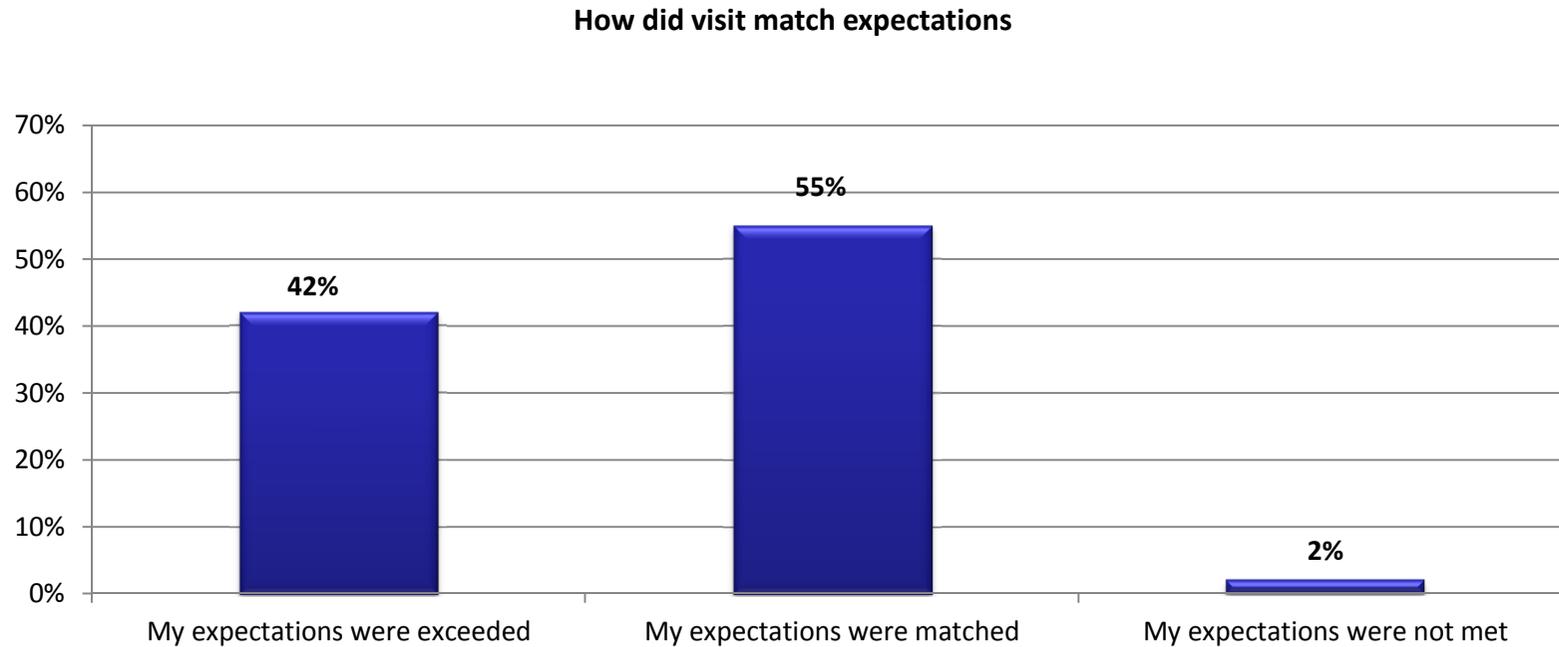
All accommodation used	Most recent	Second	Combined
Hotel	34%	37%	35%
B&B/guest house	14%	23%	16%
Holiday centre/park/camp	12%	12%	12%
Self catering holiday home	24%	11%	22%
Static caravan - owned/rented	6%	5%	6%
Camping	3%	2%	3%
Touring Caravan	3%	1%	2%
Second home	0%	2%	1%
Friends/relatives	2%	2%	2%
Youth Hostel / Hostel	0%	0%	0%
Other	2%	4%	2%

51% of all visitors chose serviced accommodation for their visit (35% Hotel and 16% B&B/Guest House), with self catering accommodation (22%) and a holiday centre/park/camp (12%) being the next most popular choices. Respondents did not provide details of the other accommodation used.

44% of visitors booked holidays with accommodation providers featured in the 2014 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.

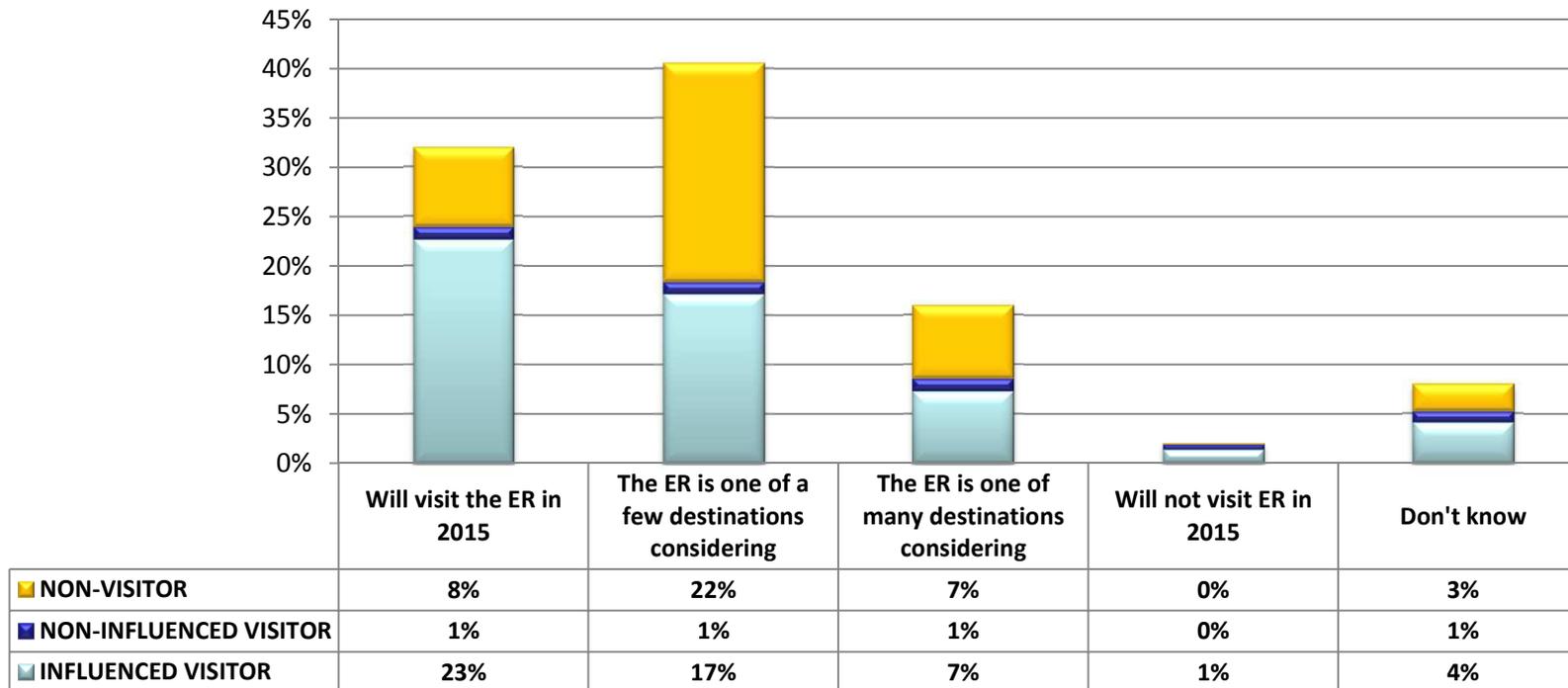
42% of all visitors stated that their expectations were exceeded



55% of visitors stated that their visit to the English Riviera matched their expectations. However, more importantly, 42% of visitors had their expectations exceeded – 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 1% of all respondents have ruled out visiting the resort in 2015



95% of those recalling the guide stated that they would consider visiting the English Riviera in the future with the remaining 5% being unsure. Those that would consider visiting were asked their situation with regards to visiting the English Riviera in 2015.

32% of respondents have already decided to visit the English Riviera in 2015 with 75% of these being repeat visitors from 2014 and 25% being non-visitors in 2014. Whilst only 1% of all respondents have ruled out the English Riviera as a destination to visit in 2015 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 15% considering the resort along with many other destinations.

Please note that these results include all respondents who indicated in the survey that recalled receiving the guide and said they would consider visiting the English Riviera in the future.

All respondents were from the UK



The table below details UK origin by respondent type. South East (19%), South West and West Midlands (16% each) and North West (10%) provided the largest proportions of respondents.

Region/Country	All respondents
East of England	8%
London	4%
East Midlands	9%
North East	3%
North West	10%
South East	19%
South West	16%
West Midlands	16%
Yorkshire and The Humber	6%
Scotland	3%
Wales	6%
Northern Ireland	0%

For further information please contact

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