Devon destination report
VisitEngland Destination tracker:

- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience measures** such as, visitation, spend, stay length, satisfaction and advocacy within individual destinations. As well as the **imagery perceptions** of each destination.
- In this report there are two different definitions of Devon. The first is “Devon” as a destination in its own right. This definition is only asked of some questions and these are included in the first section. The second is “Devon (net score)” and this is a net of visitors to specific destinations within Devon: “Torquay/ English Riviera”, “Plymouth” and “Other Devon”.
- All respondents are GB holiday takers, having taken a GB break in the past 12 months or are expecting to in the next 12 months. This accounts for approx. 49% of the population.
- Significant differences will be indicated by a **blue↑/red↓** against GB where relevant.
- This report provides a snapshot of:
  1. A demographic split of destination visitors
  2. The behaviours exhibited at the destination: How loyal are they to the destination and how satisfied were they with their trip?
  3. How GB holiday makers perceive this destination and how does it compare with others?
- Finally there is a summary of findings.
Section 1- Devon asked on a county destination level
Who is visiting?

**Ever Visited Devon:**

70%

**Visited destination in the last 3 years**

<table>
<thead>
<tr>
<th>Region of origin</th>
<th>Devon</th>
<th>Great Britain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wales</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Scotland</td>
<td>4%</td>
<td>9%</td>
</tr>
<tr>
<td>North East</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>North West</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Yorkshire/ Humberside</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>East Anglia / East of England</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Greater London</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>South East</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>South West</td>
<td>11%</td>
<td>9%</td>
</tr>
</tbody>
</table>

**Gender**

- Male: Devon 56% ↑ Great Britain 49%
- Female: Devon 44% ↓ Great Britain 51%

**Region of origin**

- Wales: Devon 4% ↑ Great Britain 5%
- Scotland: Devon 4% ↓ Great Britain 9%
- North East: Devon 3% ↑ Great Britain 4%
- North West: Devon 11% ↑ Great Britain 11%
- Yorkshire/ Humberside: Devon 6% ↑ Great Britain 9%
- East Midlands: Devon 7% ↑ Great Britain 7%
- West Midlands: Devon 11% ↑ Great Britain 9%
- East Anglia / East of England: Devon 9% ↑ Great Britain 10%
- Greater London: Devon 14% ↑ Great Britain 13%
- South East: Devon 21% ↑ Great Britain 14%
- South West: Devon 11% ↑ Great Britain 9%

*Significant differences are indicated by blue ↑/red ↓ against GB*

**Time since last visit**

- Within 6 months: 30%
- 7 - 12 months: 21%
- 1 - 3 years: 29%
- >3 years: 20%

*Please note respondents can have visited more than one destination in the last 3 years*
Consideration, Loyalty and Rejection

Devon is popular among domestic holiday makers and the destination has a level of loyalty that far surpasses the GB average.

<table>
<thead>
<tr>
<th>Loyalty Ladder</th>
<th>Devon destination average</th>
<th>Great Britain destination average*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Loyal</strong></td>
<td>35%</td>
<td>17%</td>
</tr>
<tr>
<td>(I often/sometimes take holidays there and intended to in the next year/couple of years)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Considerers</strong></td>
<td>50%</td>
<td>48%</td>
</tr>
<tr>
<td>(I have been/never been to this destination before but would like to in the future)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Rejecters</strong></td>
<td>12%</td>
<td>26%</td>
</tr>
<tr>
<td>(I have been/never been to this destination before and am not likely to do so in the future)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base n= 697 (Devon) 12179 (GB destination average)

* Averages taken manually from averaging each destination, not via net.
Destination attribute perception - among GB holiday makers

These questions ask how destinations are perceived generally, not how each was rated on a recent trip. The question is asked of visitors and non-visitors.

### Thematic images endorsement

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Great Britain*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seaside</td>
<td>72%↑</td>
</tr>
<tr>
<td>Rural</td>
<td>69%↑</td>
</tr>
<tr>
<td>Coastal</td>
<td>68%↑</td>
</tr>
<tr>
<td>Food and beverage</td>
<td>64%↑</td>
</tr>
<tr>
<td>Family</td>
<td>64%↑</td>
</tr>
<tr>
<td>Friends</td>
<td>57%↑</td>
</tr>
<tr>
<td>Relax</td>
<td>57%↑</td>
</tr>
<tr>
<td>Historic</td>
<td>52%↑</td>
</tr>
<tr>
<td>Sports</td>
<td>47%↑</td>
</tr>
<tr>
<td>Nature</td>
<td>44%</td>
</tr>
<tr>
<td>Festivals</td>
<td>41%↑</td>
</tr>
<tr>
<td>Adventure Sport</td>
<td>40%↑</td>
</tr>
<tr>
<td>Arts</td>
<td>32%↓</td>
</tr>
<tr>
<td>Shopping</td>
<td>30%</td>
</tr>
</tbody>
</table>

### Perceptions of Destination

- Beautiful: 83%↑
- Relaxing: 79%↑
- Welcoming: 77%↑
- Lots to see and do: 76%↑
- Quality accommodation: 75%↑
- Authentic: 72%↑
- Distinct identity: 71%↑
- Traditional: 69%↑
- Fun: 69%↑
- Breath taking: 65%↑
- Romantic: 59%↑
- For all seasons: 57%↑
- Value for money: 52%↑
- Exciting: 52%↑
- Easy to get to: 51%↑
- More for the old: 47%↑
- Upmarket: 43%↑
- Out of the ordinary: 42%↑
- Stylish: 42%↑
- More for the young: 31%↑

### Statements shown as image boards, please see next slide

- Devon is associated more strongly with other GB destinations with the majority of attributes tested. The top attributes selected are: seaside, rural and coastal image boards; and beautiful, relaxing and welcoming statements.

Base: Devon n=322, Total n=12179
Question name: C90 Destination attributes

* Averages taken manually from summing each destination, not via net.

Significant differences are indicated by blue↑/red↓ against GB.
The theme boards

Image boards (E30/35)

- Shopping
- Seaside
- Rural
- Relax
- Nature
- Historic
- Adventure

Friends
- Food & drink
- Festivals
- Family
- Coastal
- Arts
- Sports

Word associations (E40/45)
- Beautiful
- Breath-taking
- Distinct culture
- Traditional
- Authentic
- Relaxing
- Quality accommodation
- Fun
- Friendly
- Romantic
- Surprising
- Exciting
- Out of the ordinary
- Value for money
- For all seasons
- Stylish
- More for the old
- Easy to get to
- Upmarket
- More for the young
Section 2 - Devon (net score) shown as a net of destinations within Devon: “Torquay/ English Riviera”, “Plymouth” and “Other Devon”
Satisfaction & intention to visit

<table>
<thead>
<tr>
<th>Loyalty Ladder</th>
<th>Devon (net score) destination average</th>
<th>Torquay/English Riviera</th>
<th>Plymouth</th>
<th>Other Devon destination</th>
<th>Great Britain destination average*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfaction</td>
<td>47%</td>
<td>46%</td>
<td>39%</td>
<td>52%</td>
<td>48%</td>
</tr>
<tr>
<td>Likelihood to revisit</td>
<td>8.2</td>
<td>8.2</td>
<td>7.6</td>
<td>8.5</td>
<td>8.4</td>
</tr>
</tbody>
</table>

Base n=
- Devon: 651
- Torquay/English Riviera: 239
- Plymouth: 141
- Other Devon destination: 271
- Great Britain destination: 12179

TORQUAY AND THE ENGLISH RIVIERA ALONG WITH PLYMOUTH HAVE LOWER SATISFACTION AND LIKELIHOOD TO REVISIT SCORES THAN ‘OTHER’ DEVON DESTINATIONS.

Base: In table Asked of all Devon shown on rotation from reduced destination list / Most recently visited destination
Question name: In tables

*Averages taken manually from averaging each destination, not via net.
The qualities of Devon (net score) are in line with the rest of GB, with visitors to these destinations rating Devon in a similar way to other destinations. History and heritage in Devon (net score) is an exception, in that, significantly fewer visitors endorsed this statement compared to the GB average.
<table>
<thead>
<tr>
<th>Destination attribute</th>
<th>Torquay/ English Riviera</th>
<th>Plymouth</th>
<th>Other Devon destination</th>
</tr>
</thead>
<tbody>
<tr>
<td>The quality of the natural environment</td>
<td>81%</td>
<td>71%</td>
<td>85%</td>
</tr>
<tr>
<td>Being welcoming and friendly</td>
<td>73%</td>
<td>65%</td>
<td>77%</td>
</tr>
<tr>
<td>The quality of food &amp; drink</td>
<td>69%</td>
<td>69%</td>
<td>76%</td>
</tr>
<tr>
<td>The quality of accommodation options</td>
<td>76%</td>
<td>60%</td>
<td>74%</td>
</tr>
<tr>
<td>The availability of information about the destination before you get there</td>
<td>73%</td>
<td>61%</td>
<td>67%</td>
</tr>
<tr>
<td>The customer service given</td>
<td>69%</td>
<td>57%</td>
<td>68%</td>
</tr>
<tr>
<td>The availability of information about the destination once you're there</td>
<td>72%</td>
<td>54%</td>
<td>66%</td>
</tr>
<tr>
<td>Offering a distinctive, authentic experience</td>
<td>67%</td>
<td>55%</td>
<td>68%</td>
</tr>
<tr>
<td>The ease of getting around the destination</td>
<td>66%</td>
<td>58%</td>
<td>64%</td>
</tr>
<tr>
<td>Its overall value for money</td>
<td>66%</td>
<td>59%</td>
<td>62%</td>
</tr>
<tr>
<td>Its history and heritage (famous buildings, castles, monuments)</td>
<td>61%</td>
<td>63%</td>
<td>64%</td>
</tr>
<tr>
<td>The range of attractions and things to do</td>
<td>65%</td>
<td>55%</td>
<td>64%</td>
</tr>
<tr>
<td>The availability of individual/independent local shops</td>
<td>66%</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td>The ease of getting to the destination</td>
<td>63%</td>
<td>51%</td>
<td>60%</td>
</tr>
</tbody>
</table>

‘OTHER DEVON’ IS THE MOST ENDORSED DESTINATION BY VISITORS FOR THE QUALITY IF THE NATURAL ENVIRONMENT, BEING WELCOMING AND FRIENDLY AND THE QUALITY FOOD AND DRINK. TORQUAY/ENGLISH RIVIERA SCORES HIGHER ACROSS ALL OTHER ATTRIBUTES.
Summary: Devon

Devon

- The majority of GB domestic holiday makers have visited Devon.
- Visitors to Devon are more likely to be male and from the South-East.
- In line with the high levels of visitation, loyalty to Devon among domestic holiday makers is double that of GB. In turn, the level of rejection of Devon is less than half of that elsewhere in GB.
- Significantly more domestic holiday-makers associated Devon with a range of attributes than the average GB destination (24 out of 34). Most notable of these are: seaside, rural and coast image boards; and beautiful, relaxing and welcoming statements.

Devon (net score)

- Among visitors to Devon (net score), likelihood to revisit and satisfaction with the destination is in line with the GB average. At an individual destination level, ‘Other Devon’ has higher scores than the GB average, while Plymouth has a lower level of satisfaction and likelihood to revisit.
- This finding runs parallel to the levels of satisfaction with the destination attributes among visitors. “Other Devon” performs best on The quality of the natural environment, Being welcoming and friendly and The quality of food & drink whilst Torquay/English Riviera has highest satisfaction scores on the other attributes.