REPORT TO: **SCRUTINY COMMITTEE – ECONOMY**
Date of Meeting: **12 November 2015**
Report of: **Economy & Tourism Manager – Victoria Hatfield**
Title: **Exeter & the Heart of Devon Visitor Research 2015**

Is this a Key Decision?
No

Is this an Executive or Council Function?
No function is being exercised. This report is for information only.

1. What is the report about?

1.1 To report on the annual volume and value of tourism data for Exeter & the Heart of Devon, the results of the Visit England visitor satisfaction tracker, research relating to ”The Gove Effect” and general trends within the visitor industry.

2. Recommendations:

2.1 That Scrutiny notes the report and comment on the research detailed within this report.

3. Reasons for the recommendation:

3.1 To inform members on the number of visitors to the area, visitor spend and trends within the visitor economy.

4. What are the resource implications including non financial resources:

4.1 Research detailed within this report is for paid externally, by either Visit Devon or the Exeter & the Heart of Devon Tourism Partnership. The results of all research projects will be used to adjust marketing activity undertaken by Exeter City Council, Exeter & the Heart of Devon Tourism Partnership and Visit Devon.

4.2 Marketing activity, on behalf of Exeter & the Heart of Devon Tourism Partnership, is undertaken by the Tourism Promotion & Support Officer (3 days per week) of Exeter City Council, their work will be adjusted as a result.

5. Section 151 Officer comments:

5.1 There are no financial implications contained in this report.

6 What are the legal aspects?

6.1 None.

7. Monitoring officer Comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Background

8.1 The Exeter & the Heart of Devon Tourism Partnership and Visit Devon commission research on an annual basis to monitor trends within the visitor economy, to ensure that marketing activity undertaken to promote the area is succeeding in its purpose and that general changes within the visitor economy are taken into account. The results of international, national and local research are used to paint a picture of how the visitor economy is performing within the city and the rest of Devon.

8.2 Exeter & the Heart of Devon Tourism Partnership (Exeter, East Devon, Mid Devon and Teignbridge) commission The South West Research Company to undertake annual volume and value research on the visitor economy. This research identifies how many people visit the area, how much they spend whilst holidaying in the area and on what plus the number of jobs supported by this spend. This research is used to monitor trends over time and changes within the visitor economy; with the results being used to alter marketing activity and investment within the visitor product.

8.3 Visit Devon commission Visit England to undertake visitor research to enable them to gain a better understanding of how Devon compares to other destinations within England. Visit Devon also commissioned a local company to undertake research on the impact of national regulations governing taking children out of school during term time – “The Gove Effect”. The Tourism Society and The South West Tourism Alliance also commissioned Plymouth University to undertake research on the impact and solutions to taking children out of school in term time across the whole of the South West region.

9 General trends within the visitor industry

9.1 From a wide range of sources, including Visit England, Visit Devon and various independent research reports, the following have been highlighted as recent trends within the visitor economy, which would play a direct impact on people holiday in Exeter and the Heart of Devon. These include:

- Predicted holidays of 7 nights or more are at their lowest level since 2010, indicating that the ‘staycation’ is in decline.
- The drop in UK holidays (the ‘staycation’) is primarily driven by ABC1’s (socio economic groups) upgrading to overseas holidays and C2DE’s considering fewer holidays.
- Overall feelings of job security has improved, which has resulted in an increase on spend on holidays.
- Just under half of holiday makers stay for approx 5 – 7 nights.
- Seaside destinations within the South West have witnessed a drop in bookings; this is primarily due to the area being very weather dependent.
- The South West still remains one of the most popular holiday destinations within the UK, with 25% of people indicating they will holiday in this area.
- Smartphone use whilst on holiday increases dramatically year on year.
- Devon was the third most popular destination within the UK; it has now slipped one place to fourth.
- The majority of holidaymakers are likely to stay in a 3 star hotel or a self-catering unit.
- Social media is still the dominant force for influencing holiday decisions.
- Approximately 88% of holiday makers use a mobile devise whilst on holiday, using it for:
    - telling people about their holiday and sharing photos
    - maps
    - updates on weather reports
    - accessing social network websites
    - games
    - keeping up to date on the latest news & sport

9.2 From the trends indicated above, having reliable and super-fast wifi and broadband within Exeter and the Heart of Devon is vital to ensure each and every visitor has the experience they expect when visiting the area.

10 The Gove Effect

10.1 In 2013 the then Education Secretary introduced changes to the regulations governing taking children out of school during term time, with fines being introduced. With the result of parents only being able to take their children out of school under very exceptional circumstances, fines were introduced for unauthorised absence. The impact of these measures has been called “The Gove Effect”.

10.2 Visit Devon commissioned The South West Research Company late 2014 to undertake research to determine if “The Gove Effect” is having an impact on the visitor economy within Devon. An online survey was distributed to previous visitors to Devon, with a total of 3,581 responses were received.

10.2.1 The largest proportion of respondents who had holidayed in Devon with school children had stayed in either self catering accommodation or a rented static caravan. The majority of visitors without children stay in a hotel and B&B.

10.2.2 The majority of families visit Devon during April, July and August and visitors without children stay during May, June and September.

10.2.3 17% of families surveyed indicated that they visit during school holidays due to school term-time restrictions

10.3 48% of families holidaying in Devon have been impacted by the changes, this equates to £43.3m of lost visitor spend within Devon. The £43.3m loss is broken down into the following sectors:

	%	Value
Accommodation	38	£16,284,823
Food & Drink	22	£9,609,437
Travel	17	£7,278,937
Retail	13	£5,501,751
Attractions	11	£4,695,586
TOTAL		**£43,307,534**

10.4 As part of this research businesses within Devon were also surveyed, with 42% indicating visitor numbers had decreased in 2014 with 51% saying business had stayed the same. The biggest decrease in visitor numbers was in urban locations (such as Exeter) at 50% and along the coast, with 41% of businesses indicating a drop in business.

10.5 Plymouth University was commissioned by The Tourism Society and The South West Tourism Alliance to undertake an industry survey across the full South West region. The findings show that there has been a fall in income of over 30% for a fifth of tourism businesses in the South West region, a significant amount.

10.6 257 tourism business located within the South West completed the survey, in terms of impact, the following was established:

- two thirds of tourism businesses believe they have been negatively affected by the change in regulations.
- a fifth of businesses do not believe they have been negatively affected by the change in regulations.
- the change in regulations has led to a fall in income of over 30% for a fifth of respondents, and a reduction of income for nearly two thirds.
- the majority of businesses that responded did not approve of the regulations in their current form and offered a number of possible changes to the regulations that might usefully be considered by policy makers. The three most highly rated options are as follows:
    - working with educators to create recognised educational breaks which do not count as ‘out of school’.
    - grouping school ‘training days’ to form an extra week of school holidays.
    - phasing school holidays regionally, so that terms are spread more across the year.
- furthermore, businesses also felt that staggering school holidays across the UK was worth considering, as was allowing a number of days absence per term, particularly for younger children.

- there is some evidence that impacts are felt differently across the region with the furthest flung regions (especially Cornwall) feeling the impact more due to the difficulty in attracting a two-night weekend market given travel distances from source markets.

10.7 To support the two pieces of research relating to “The Gove Effect” Visit Cornwall, The South West Tourism Alliance, Tourism Society West Country and Visit Devon produced a "Win, Win, Win" paper highlighting the effects of “The Gove Effect” on the visitor economy and opportunities for change relating to regulations governing taking children out of school during term time. This paper has been presented to government and distributed widely to South West MP’s.

10.8 Nationally, the impact of “The Gove Effect” is starting to get traction, October 2015 the Local Government Association (LGA) announced that a "realistic, common sense approach is needed by Government in relation to term time holidays". There was also a Parliamentary debate on “The Gove Effect” on Monday 26 October which is expected to feature a number of South West MPs whose constituencies have suffered from the 'Gove Effect'.

11 Exeter & the Heart of Devon Volume & value data

11.1 Comparing 2014 to 2013 there has been a number of decreases with the visitor economy in the area, relating to the number of people visiting Exeter & the Heart of Devon and how much they spend whilst on holiday:

- A decrease in jobs supported by visitor spend by 8.07% to 21,439
- A decrease in day visitors by 3.62% to 11,665,000
- A decrease in day visitor associated spend of 1.86% to £387.9m
- A decrease in overnight visitors by 1.58% to 1,771,300 (this increased in Exeter by 1.11%)
- A decrease in overnight associated visitor spend of 8.19% to £414.5m
- A decrease on spend on travel within the area of 0.56% to £116.2m
- A decrease in spend associated with boats and second homes by 5.47% to £28.5m

Appendix 1 shows the latest available volume and value data for Exeter & the Heart of Devon, plus the previous 4 years.

11.2 When you compare Exeter to the wider area, there are still decreases in visitor numbers and spend, but not as high.

11.3 The above decreases are not unique to Exeter & the Heart of Devon, this has also occurred within the rest of Devon and in some cases nationally across England. According to national bodies, the primary reason for this decline, comparing 2014 to 2013, was due to the high number of people holidaying within England as a result of London hosting the Olympics in 2012. Also, due to the area attracting and welcoming many families “The Gove Effect” is also playing its part in reducing visitor numbers and spend throughout the year.

11.4 A typical day visitor to Exeter & the Heart of Devon spends approximately £33.86, whilst an overnight visitor spends £218.33 per trip. Marketing activity undertaken by the Tourism Partnership is to shift a day visitor into an overnight visitor, primarily because they spend more money in a destination supporting local employment opportunities.

11.5 Work will continue to promote Exeter & the Heart of Devon regionally, nationally and where possible internationally to attract additional overnight visitors to the area.

12 Devon Visitor Satisfaction & Imagery Tracker

12.1 To gain a better understanding of how Devon compares to other destinations within England and if peoples’ perceptions of the county are changing (comparing data from previous years); Visit Devon participated in the Visit England brand tracker survey. The research took place between June 2014 and December 2014. An online visitor survey is sent to approx. 100 English residents per week over a 12 month period (aim is to gain 5,000 in total), who take at least one nights holiday in paid accommodation.

12.2 Overall, Devon rates above average for the majority of visitor satisfaction statements comparing the county to England in general, especially:

- A place where I feel safe and secure
- Clean and well maintained beaches
- Beaches which are safe and suitable for bathing
- Welcoming and friendly people
- Quality of accommodation
- Clean and tidy environment
- Value for money accommodation
- Range of water & beach based activities

The underperforming areas for Devon are:

- A destination that doesn't take too long to get to
- Range of outdoor countryside activities
- Ease of getting around by public transport
- A destination that is easy to get to by public transport

The full range of imagery statements can be found in Appendix 2.

12.3 Comparing the results of the research undertaken in 2011, Devon has performed better in the following areas:

- Unspoilt countryside
- Availability of a wide range of attractions & things to do
- The range of water & beach based activities
- Availability of individual / independent shops
- A destination that doesn't take too long to get to

Unfortunately, Devon has underperformed in a number of areas:

- Quality of accommodation
- Ease of booking your trip
- Interesting towns and villages to visit
- Range of outdoor activities

12.4 A range of statements were given to visitors and non-visitors to Devon, to understand the gap in peoples' perception of the county. Once someone has visited Devon, it is clear they are an ambassador for the county and will return again and again.

- It makes me want to return again and again
- It's a great way to spend time with your friends
- Is good value for money
- Is easy to get to

12.5 The results of the Visit England brand tracker research are very positive in terms of a visitor's perception of Devon. The results of the research will be incorporated into marketing material for Visit Devon and Exeter & the Heart of Devon, especially in the use of photos showing people relaxing and enjoying the city, coast and countryside. One area to focus marketing activity on would the ease of getting to Devon, public transport and the wide range of activities to do in the county.

13 Future Position

13.1 The results of all visitor surveys and research undertaken will be used to determine marketing activity to promote Exeter & the Heart of Devon within the South West region and throughout the rest of the UK to increase overnight visitors to the area. Due to limited budget and personnel resources, marketing the area overseas will be limited to partnership working with Visit Devon and Visit England. Discussions are ongoing as to how the City

Council and Exeter BID can work in partnership to promote the city regionally to attract more visitors, both day and overnight.

13.2 The results of the research contained within this report will be shared with members of the Exeter & the Heart of Devon Tourism Partnership, Exeter Cultural Partnership, partners and local authorities so that businesses can use the results to help inform their marketing activity and to improve their product offering to attract more visitors, especially overnight.

13.3 Visit Devon and a number of other bodies within the South West are lobbying government on the effects of taking children out of school during term time, due to our high reliance and attracting a significantly number of families – compared to other destinations within the UK. This work will continue until a reasonable solution can be found.

14 How does the decision contribute to the Council's Corporate Plan?

14.1 Exeter & the Heart of Devon Tourism Partnership contributes to 'Building a stronger sustainable city' and the main purpose of 'Help me run a successful business in Exeter' in promoting the city as a vibrant, cultural modern city in attracting people to visit the area thus spending money in the local economy and supporting jobs.

15 What risks are there and how can they be reduced?

15.1 Limited risk arising from this activity.

16 What is the impact of the decision on equality and diversity; health and wellbeing; safeguarding children, young people and vulnerable adults; economy; safety and the environment?

16.1 The Exeter & the Heart of Devon Tourism Partnership promotes the area regionally and nationally to encourage people to visit the area, thus spending money here rather than elsewhere, which supports local employment and the economy. Promotional activity in 2014 has been focused on cycling, this will continue during 2015 due to developments within the cycling infrastructure as well as other outdoor and indoor activities – which promotes a healthy lifestyle.

17 Are there any other options?

17.1 Visit Devon fund the majority of research undertaken within this committee report. It would be unwise for the Exeter & the Heart of Devon Tourism Partnership to commission additional research as it would duplicate work already undertaken, plus it would not gain the national reach.

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Economy & Tourism Manager

Local Government (Access to Information) Act 1972 (as amended)
Background papers used in compiling this report:
None

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APPENDIX 1

Economic impact of tourism within Exeter and the Heart of Devon 2014

	Exeter	**East Devon**	**Mid Devon**	**Teignbridge**	**TOTAL**
Direct actual jobs	2,984	4,828	1,801	4,770	14,383
Indirect actual jobs	1,168	1,588	353	1,586	4,695
TOTAL ACTUAL jobs	4,152	6,416	2,154	6,356	19,078
Day visits	1,670,000	4,145,000	1,733,000	3,695,000	11,243,000
Total Day visit spend	£62,718,000	£139,588,000	£54,757,000	£123,693,000	£380,756,000
▪ Shopping	£27,307,000	£35,844,000	£16,811,000	£35,896,000	£115,858,000
▪ Food & Drink	£23,382,000	£62,484,000	£23,055,000	£53,453,000	£162,374,000
▪ Attractions & Entertainment	£6,129,000	£16,659,000	£7,708,000	£15,175,000	£45,671,000
▪ Travel	£5,900,000	£24,601,000	£7,183,000	£19,169,000	£56,853,000
Overnight trips	454,000	502,000	200,000	587,000	1,743,000
Total Overnight trips spend	£112,132,000	£109,691,0000	£37,439,000	£121,301,000	£380,563,000
▪ Accommodation	£38,822,000	£39,223,000	£13,211,000	£43,938,000	£135,194,000
▪ Food & Drink	£24,324,000	£24,080,000	£8,343,000	£26,993,000	£83,740,000
▪ Shopping	£20,132,000	£16,849,000	£5,823,000	£17,500,000	£60,304,000
▪ Travel	£16,110,000	£17,153,000	£5,901,000	£19,595,000	£58,759,000
▪ Attractions	£12,744,000	£12,386,000	£4,161,000	£13,275,000	£42,566,000
Visits to friends & relatives spend	£6,353,000	£6,971,000	£4,048,000	£6,511,000	£23,883,000
Other tourism spend	£163,000	£1,760,000	£180,000	£1,008,000	£3,111,000
TOTAL VISITOR SPEND	**£181,366,000**	**£258,010,000**	**£96,424,000**	**£252,513,000**	**£607,494,000**
TOTAL VISITOR TRIPS	**2,124,000**	**4,647,000**	**1,933,000**	**4,282,000**	**12,986,000**

Economic impact of tourism within Exeter and the Heart of Devon 2013

	Exeter	East Devon	Mid Devon	Teignbridge	TOTAL
Direct actual jobs	3,362	5,425	2,053	5,539	16,379
Indirect actual jobs	1,253	1,709	378	1,717	5,057
TOTAL ACTUAL jobs	4,615	7,134	2,431	7,259	21,439
Day visits	1,714,000	4,288,000	1,808,000	3,855,000	11,665,000
Total Day visit spend	£63,032,000	£142,543,000	£55,706,000	£126,699,000	£387,980,000
▪ Shopping	£27,423,000	£37,044,000	£17,309,000	£37,036,000	£118,812,000
▪ Food & Drink	£23,507,000	£63,621,000	23,377,000	£54,642,000	£165,147,000
▪ Attractions & Entertainment	£6,166,000	£16,962,000	£7,772,000	£15,500,000	£46,400,000
▪ Travel	£5,936,000	£24,916,000	£7,248,000	£19,521,000	£57,621,000
Overnight trips	449,000	521,000	207,000	594,300	1,771,300
Total Overnight trips spend	£121,382,000	£120,515,000	£40,948,000	£131,664,000	£414,509,000
▪ Accommodation	£41,306,000	£43,194,000	£14,368,000	£47,667,0000	£146,535,000
▪ Food & Drink	£25,924,000	£18,484,000	£9,191,000	£29,518,000	£83,117,000
▪ Shopping	£23,216,000	£26,425,000	£6,427,000	£18,916,000	£74,984,000
▪ Travel	£16,973,000	£13,241,000	£6,586,000	£21,843,000	£58,643,000
▪ Attractions	£13,963,000	£19,171,000	£4,376,000	£13,720,000	£51,230,,000
Visits to friends & relatives spend	£6,714,000	£7,463,000	£4,338,000	£6,945,000	£25,460,000
Other tourism spend	£163,000	£1,766,000	£180,000	£1,008,000	£3,117,000
TOTAL VISITOR SPEND	**£191,291,000**	**£272,254,000**	**£101,172,000**	**£266,316,000**	**£831,033,000**
TOTAL VISITOR TRIPS	**2,163,000**	**4,809,000**	**2,015,000**	**4,449,300**	**13,436,300**

Economic impact of tourism within Exeter and the Heart of Devon 2012

	Exeter	**East Devon**	**Mid Devon**	**Teignbridge**	**TOTAL**
Direct actual jobs	3,539	5,396	2,199	5,194	17,048
Indirect actual jobs	1,284	1,687	397	1,784	5,152
TOTAL ACTUAL jobs	4,823	7,083	2,596	7,698	22,200
Day visits	1,818,000	4,213,000	1,724,000	3,808,000	11,563,000
Total Day visit spend	£66,950,000	£136,906,000	£60,962,000	£128,599,000	£393,420,000
▪ Shopping	£29,178,000	£38,906,000	£19,031,000	£39,661,000	£126,550,000
▪ Food & Drink	£24,949,000	£59,701,000	£25,503,000	£51,521,000	£164,674,000
▪ Attractions & Entertainment	£6,533,000	£16,437,000	£8,500,000	£15,846,000	£47,316,000
▪ Travel	£6,292,000	£22,088,000	£7,928,000	£18,571,000	£54,877,000
Overnight trips	445,000	526,000	211,000	616,000	1,798,000
Total Overnight trips spend	£119,535,000	£119,072,000	£39,146,000	£135,560,000	£413,313,000
▪ Accommodation	£40,652,000	£42,545,000	£13,716,000	£49,032,000	£145,945,000
▪ Food & Drink	£25,643,000	26,371,000£	£8,883,000	£30,688,000	£91,585,000
▪ Shopping	£21,537,000	£17,384,000	£5,807,000	£18,441,000	£63,169,000
▪ Travel	£17,777,000	£19,692,000	£6,614,000	£23,517,000	£67,600,000
▪ Attractions	£13,926,000	£13,080,000	£4,126,000	£13,882,000	£45,014,000
Visits to friends & relatives spend	£8,975,000	£10,217,000	£5,971,000	£9,527,000	£34,690,000
Other tourism spend	£163,000	£1,760,000	£180,000	£1,008,000	£3,112,000
TOTAL VISITOR SPEND	£195,623,000	£267,955,000	£106,259,000	£274,694,000	£844,535,000
TOTAL VISITOR TRIPS	**2,263,000**	**4,739,000**	**1,935,000**	**4,424,000**	**13,361,000**

Economic impact of tourism within Exeter and the Heart of Devon 2011

	Exeter	East Devon	Mid Devon	Teignbridge	TOTAL
Direct actual jobs	2,951	5,122	1,924	5,004	15,001
Indirect actual jobs	996	1,362	328	1,405	4,091
TOTAL ACTUAL jobs	3,947	6,484	2,252	6,409	19,092
Day visits	1,688,000	3,987,000	1,671,000	3,589,000	10,935,000
Total Day visit spend	£62,290,000	£129,910,000	£59,223,000	£121,412,000	£372,835,000
▪ Shopping	£27,206,000	£36,471,000	£18,181,000	£37,320,000	£119,178,000
▪ Food & Drink	£23,191,000	£56,726,000	£24,936,000	£51,522,000	£156,375,000
▪ Attractions & Entertainment	£60,58,000	£15,732,000	£8,337,000	£14,998,000	£45,125,000
▪ Travel	£5,835,	£20,981,000	£7,769,000	£17,572,000	£52,157,000
Overnight trips	453,000	513,000	206,000	619,000	1,791,000
Total Overnight trips spend	£96,939,000	£105,045,000	£35,943,000	£116,853,000	£354,780,000
▪ Accommodation	£34,072,000	£37,489,000	£12,854,000	£42,241,000	£126,656,000
▪ Food & Drink	£20,923,000	£23,025,000	£8,010,000	£26,152,000	£78,110,000
▪ Shopping	£16,925,000	£16,189,000	£5,462,000	£16,664,000	£55,240,000
▪ Travel	£14,086,000	£16,485,000	£5,712,000	£19,148,000	£55,431,000
▪ Attractions	£10,933,000	£11,857,000	£3,905,000	£12,648,000	£39,343,000
Visits to friends & relatives spend	£7,950,000	£8,835,000	£5,059,000	£8,462,000	£30,306,000
Other tourism spend	£103,000	£750,000	£117,000	£599,000	£1,569,000
TOTAL VISITOR SPEND	£167,282,000	£244,540,000	£100,342,000	£247,326,000	£759,490,000
TOTAL VISITOR TRIPS	**2,141,000**	**4,500,000**	**1,877,000**	**4,208,000**	**12,726,000**

Economic impact of tourism within Exeter and the Heart of Devon 2010

	Exeter	East Devon	Mid Devon	Teignbridge	TOTAL
Direct actual jobs	2,958	5,211	1,807	4,822	14,798
Indirect actual jobs	940	1,321	302	1,337	3,900
TOTAL ACTUAL jobs	3,898	6,532	2,109	6,159	18,698
Day visits	1,539,000	2,710,899	1,150,000	2,577,000	7,976,899
Total Day visit spend	£77,445,000	£119,869,000	£49,826,000	£115,487,000	£362,627,000
▪ Shopping	£33,972,000	£39,280,000	£18,194,000	£40,863,000	£132,309,000
▪ Food & Drink	£28,778,000	£50,104,000	£19,891,000	£46,920,000	£145,693,000
▪ Attractions & Entertainment	£7,483,000	£13,238,000	£6,043,000	£12,827,000	£39,591,000
▪ Travel	£7,213,000	£17,247,000	£5,699,000	£14,877,000	£45,036,000
Overnight trips	442,000	508,000	198,000	594,300	1,742,300
Total Overnight trips spend	£81,098,000	£103,633,000	£36,464,000	£112,051,000	£333,246,000
▪ Accommodation	£28,961,000	£37,557,000	£13,209,000	£40,869,000	£120,596,000
▪ Food & Drink	£17,693,000	£23,061,000	£8,142,000	£25,064,000	£73,960,000
▪ Shopping	£13,386,000	£15,093,000	£5,430,000	£15,859,000	£49,768,000
▪ Travel	£12,130,000	£16,692,000	£5,800,000	£18,279,000	£52,901,000
▪ Attractions	£8,927,000	£11,228,000	£3,879,000	£11,980,000	£36,014,000
Visits to friends & relatives spend	£7,632,000	£8,480,000	£4,856,000	£8,123,000	£29,091,000
Other tourism spend	£113,000	£1,990,000	£117,000	£599,000	£2,819,000
TOTAL VISITOR SPEND	**£166,288,000**	**£233,972,000**	**£91,263,000**	**£236,260,000**	**£727,783,000**
TOTAL VISITOR TRIPS	**1,981,000**	**3,218,000**	**1,348,000**	**3,171,300**	**9,718,300**

APPENDIX 2

How does Devon compare with the national picture and other destination types?

Devon rates higher than the England average for most attributes, and rates higher than the 'seaside' average for beaches (a place I feel safe and secure and clean and well-maintained beaches). Devon slightly under-performs for being a destination that doesn't take long to get to and performs below the national average for having a range of outdoor activities and for being easy to get around by public transport.

	% rating attribute as excellent			
	ALL ENGLAND	Seaside	Countryside	Devon
Unspoilt countryside -COUNTRYSIDE	42%	-	42%	44%
A place where I feel safe and secure	27%	34%	38%	36%
Clean and well- maintained beaches -SEASIDE	27%	27%	-	34%
Beaches which are safe and suitable for bathing-SEASIDE	26%	26%	-	33%
Welcoming and friendly people	25%	31%	33%	32%
Clean and tidy environment	24%	30%	34%	32%
Quality of accommodation	26%	32%	34%	31%
Value for money of accommodation	22%	30%	27%	28%
Ease of booking your trip/different parts of your trip in advance	23%	29%	27%	27%
Ease of finding useful information about the destination when planning the trip	22%	27%	26%	27%
Quality of food, drink and dining	22%	27%	29%	27%
Levels of customer service	21%	27%	27%	27%
Value for money generally	20%	27%	25%	27%
Attractive/well maintained town/city centre - SEASIDE	24%	24%	-	26%
Interesting towns and villages to visit - COUNTRYSIDE	31%	-	31%	25%
Variety of accommodation to choose from that suits my needs	22%	28%	25%	25%
Opportunities to eat/ drink local food and produce	19%	24%	24%	24%
Availability of a wide range of attractions and things to do	21%	24%	20%	23%
Ease of finding useful information about the destination when you're there	19%	24%	22%	23%
The range of water- based/beach activities - SEASIDE	17%	17%	-	23%
Overall availability of deals and discounts for the destination	17%	22%	19%	21%
Availability of individual/independent local shops	17%	23%	20%	21%
A destination that is not too expensive to get to	20%	26%	23%	20%
A destination that doesn't take too long to get to	21%	27%	25%	19%
Clarity of signposting that helps you find your way around the destination	18%	23%	19%	18%
Availability of reasonably priced car parking	15%	19%	18%	16%
Availability of festivals, music, sporting and cultural events	14%	16%	12%	14%
Range of outdoor activities – COUNTRYSIDE	21%	-	21%	12%
Ease of getting around by public transport	16%	20%	11%	12%
A destination that is easy to get to by public transport	16%	20%	11%	12%

ABOVE AVERAGE PERFORMANCE   BELOW AVERAGE PERFORMANCE

Base: Devon visitors data, January 2013 -December 2014 (330, England 9,887)

TNS   VISIT Devon   VisitEngland