

COVID-19 Visitor Intentions Survey

August 2020 - Dorset



Produced for and on behalf of Visit Dorset and
Bournemouth, Christchurch and Poole Tourism

By

The South West Research Company Ltd.



BOURNEMOUTH | CHRISTCHURCH | POOLE

September 2020



Background and methodology

The Coronavirus (COVID-19) pandemic saw tourism and hospitality businesses having to close their doors to customers when the UK government put the country into strict lockdown measures on the 24th March 2020. These measures remained in place for tourism and hospitality businesses until Saturday 4th July when lockdown restrictions were eventually relaxed and visitors were once again allowed to stay away overnight in tourism accommodation and visit leisure attractions which had re-opened.

The South West Research Company recognised the need to develop an online survey which would be ready to use shortly after businesses started to open their doors again to visitors to help provide vital information on visitor intentions, barriers to visiting and also to collect crucial timely feedback from those that had visited post lockdown to gauge how the 'new normal' was impacting on their visitor experience. The survey was designed as a monthly survey to provide destinations with key statistics and anecdotal feedback to use in their marketing messages and to assist with developing their visitor experience.

This report contains a summary of the key findings for the second visitor intentions surveys conducted during September 2020 for Cornwall, Devon and Dorset using consumer email databases and from promoting the survey links on social media channels.

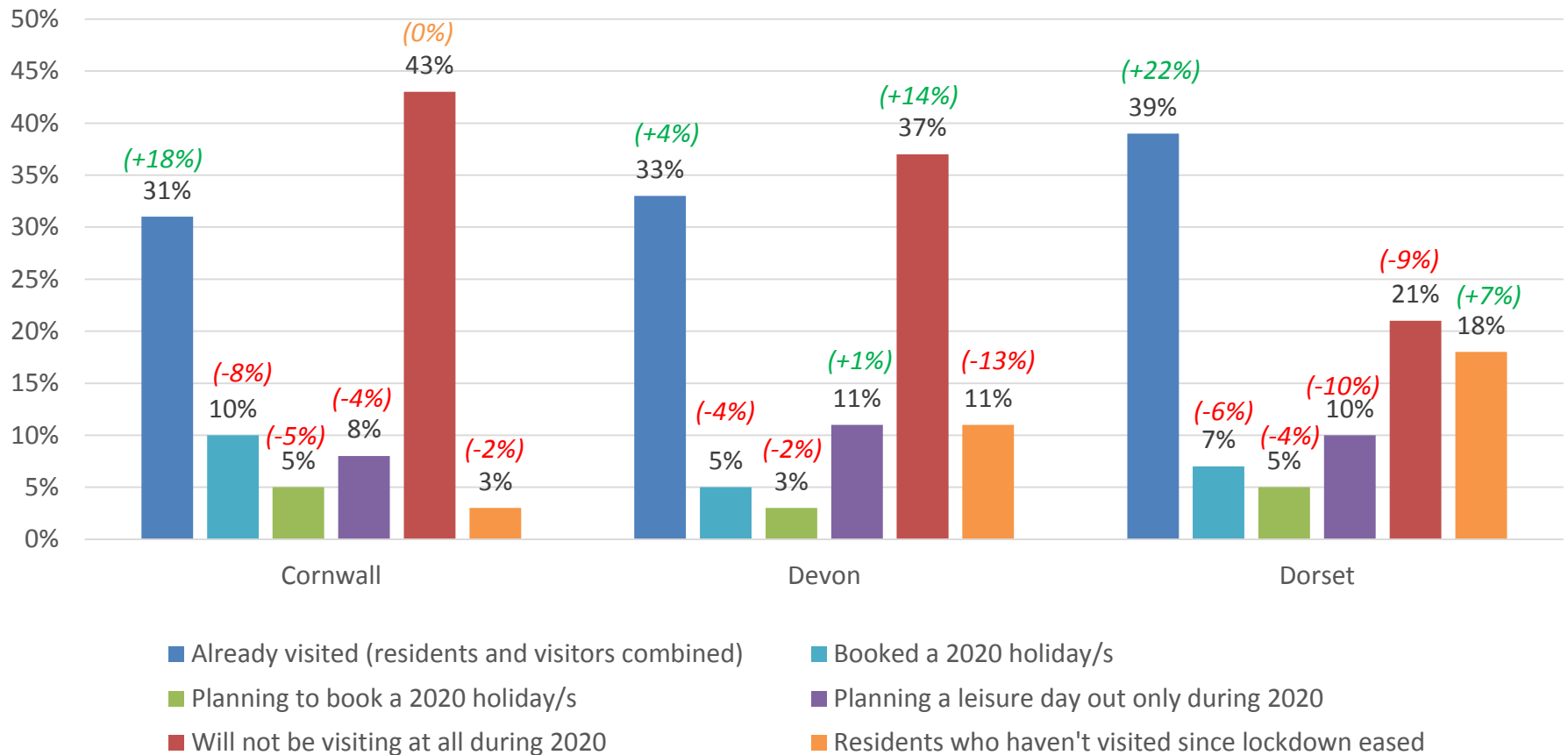
Where available, the +/- % difference between the July and August data is shown in brackets next to the August results.

A full breakdown of the results for each county is available in Excel format to accompany this summary report.

Please note that residents leisure visits within the county where they live have also been included in the survey results.

39% of respondents had already visited Dorset for a holiday or leisure day out during 2020, an increase of +22% compared with the July survey. There was a -9% decrease compared with the July survey in the proportion of respondents saying they would not be visiting Dorset at all during 2020 (21%).

Intentions to visit during 2020 (since easing of lockdown and re-opening 4th July)



Key statistics - Those visiting since lockdown*

CORNWALL	DEVON	DORSET
92% staying visitors (-%)	88% staying visitors (+7%)	88% staying visitors (+13%)
81% of day visitors visited a familiar location (-9%)	43% of day visitors visited a familiar location (-17%)	94% of day visitors visited a familiar location (+6%)
79% of staying visitors stayed at a familiar destination (-11%)	67% of staying visitors stayed at a familiar destination (-6%)	89% of staying visitors stayed at a familiar destination (+5%)
49% of staying visitors stayed at familiar accommodation (-7%)	49% of staying visitors stayed at accommodation they were using for the first time (-10%)	72% of staying visitors stayed at familiar accommodation (+6%)
99% were made to feel welcome (+3%)	98% were made to feel welcome (+2%)	95% were made to feel welcome (-3%)
96% were happy with measures taken to protect them from Coronavirus** (-%)	97% were happy with measures taken to protect them from Coronavirus** (+1%)	93% were happy with measures taken to protect them from Coronavirus** (-4%)
Recommendation score +66%** (-2%)	Recommendation score +50%** (-24%)	Recommendation score +64%** (-14%)
35% visited during August, 46% September & 16% during July (no comparable July data available)	41% visited during August, 41% September & 17% during July (no comparable July data available)	52% visited during August, 27% September & 21% during July (no comparable July data available)

* Results exclude local residents

** Results include local residents

Dorset – Those visiting since lockdown comments relating to welcome

No welcome. Last information was, during lockdown, that we were NOT welcome and no change seen since. I feel 'welcome' to leave money behind when I leave but never feel welcome on arrival.

As welcoming as ever and in difficult circumstances for the hospitality industry with the extra pressure of Covid regulations.

Very poor upon arriving to Bournemouth under the Welcome to Bournemouth sign. On the spur road someone had hung a banner saying "visitors go away, leave our town alone".

Despite restrictions, shops and attractions were doing their best to make life as "normal" as possible.

Camped on a site we hadn't visited before just outside Wool. Very welcoming and safe.

Staff in venues seemed very happy to have visitors back and were helpful.

It was reassuring to see that the Council had taken all precautions during this difficult time. Seats outside cafes and bacterial wash in public toilets.

Despite Covid restrictions I found everything was fine. Toilets and most amenities open.

Generally cafes/restaurants are pleased to see visitors back and are friendly.

Visitor satisfaction - Those visiting since lockdown*

Mean satisfaction scores on a scale of 1 to 5 – The higher the score the higher the satisfaction (+/- change compared with July survey data)	CORNWALL		DEVON		DORSET	
Accommodation – range open	4.67	+0.10	4.65	-0.03	4.61	-0.04
Accommodation - quality of service	4.72	+0.08	4.77	+0.02	4.62	-0.02
Accommodation - provisions made for your personal safety	4.70	+0.08	4.60	-0.05	4.66	+0.03
Visitor attractions & places to visit – range open	4.42	+0.21	4.19	-0.02	4.20	-0.04
Visitor attractions & places to visit - quality of service	4.58	+0.09	4.47	+0.04	4.38	-0.14
Visitor attractions & places to visit - provisions made for your personal safety	4.56	+0.06	4.48	0.00	4.43	-0.05
Places to eat & drink – range open	4.48	+0.17	4.33	+0.10	4.28	+0.03
Places to eat & drink - quality of service	4.57	+0.05	4.43	-0.10	4.34	-0.21
Places to eat & drink - provisions made for your personal safety	4.54	+0.04	4.46	-0.08	4.33	-0.16
Public toilets – availability	3.69	+0.29	3.45	+0.14	3.48	-0.15
Public toilets - provisions made for your personal safety	3.82	+0.11	3.78	+0.16	3.58	-0.24
Nightlife/evening entertainment – range open	3.88	+0.17	3.40	-0.03	3.38	0.00
Nightlife/evening entertainment – quality	4.19	+0.05	3.83	-0.28	3.80	-0.32
Nightlife/evening entertainment - provisions made for your personal safety	4.22	+0.02	3.83	-0.17	3.86	-0.34
Overall impression in terms of - General atmosphere	4.67	+0.14	4.67	+0.08	4.39	-0.22
Overall impression in terms of - provisions made for your personal safety	4.57	+0.10	4.52	+0.02	4.28	-0.23
Overall impression in terms of – enjoyment of visit	4.74	+0.12	4.70	+0.04	4.49	-0.25

* Results include local residents

Dorset – Those visiting since lockdown what worked well

Booking attractions in advance.

Staff to guide visitors and ensure social distancing.

Easy contactless payments.

Businesses employees adhering to the Covid-19 rules.

Social distancing generally good.

People were wearing face masks where appropriate.

Clear instructions on the new procedures in place.

Availability of outdoor seating for cafes.

Disposable menus.

Dorset – Those visiting since lockdown what didn't work so well

Too many people.

Beach/promenade was very busy and spatial awareness difficult to maintain.

Some restaurants have no social distancing in place.

Overcrowding on beaches.

People not paying attention to social distancing rules.

Rubbish being left behind by people who normally don't visit.

Toilets closed or limited in number.

Only some of the attractions available.

Lack of guidance in main streets for safe walking in crowds.

Key statistics - Those visiting since lockdown*

CORNWALL	DEVON	DORSET
17% don't have another holiday to Cornwall booked but are likely to take a leisure day out in Cornwall in 2020	29% don't have another holiday to Devon booked but are likely to take a leisure day out in Devon in 2020	28% don't have another holiday to Dorset booked but are likely to take a leisure day out in Dorset in 2020
19% have already booked another holiday/holidays to Cornwall to take before the end of 2020	11% have already booked another holiday/holidays to Devon to take before the end of 2020	27% have already booked another holiday/holidays to Dorset to take before the end of 2020
13% will be booking another holiday/holidays to Cornwall to take before the end of 2020	16% will be booking another holiday/holidays to Devon to take before the end of 2020	23% will be booking another holiday/holidays to Dorset to take before the end of 2020
52% will not/currently don't intend to visit Cornwall again during 2020	44% will not/currently don't intend to visit Devon again during 2020	23% will not/currently don't intend to visit Dorset again during 2020
51% will be booking another holiday/holidays to Cornwall to take during 2021	56% will be booking another holiday/holidays to Devon to take during 2021	53% will be booking another holiday/holidays to Dorset to take during 2021
46% usually take their main holiday in the UK, 16% abroad & 38% take a mix of both**	41% usually take their main holiday in the UK, 18% abroad & 41% take a mix of both**	45% usually take their main holiday in the UK, 20% abroad & 36% take a mix of both**
44% said holiday to Cornwall had replaced one that would normally have been taken abroad**	45% said holiday to Devon had replaced one that would normally have been taken abroad**	46% said holiday to Dorset had replaced one that would normally have been taken abroad**
2% said they do not intend to return to going abroad for their holidays once all lockdown/quarantine measures have been lifted**	3% said they do not intend to return to going abroad for their holidays once all lockdown/quarantine measures have been lifted**	4% said they do not intend to return to going abroad for their holidays once all lockdown/quarantine measures have been lifted**
24% said they are more likely to visit Cornwall again for another holiday in the future**	34% said they are more likely to visit Devon again for another holiday in the future**	30% said they are more likely to visit Dorset again for another holiday in the future*

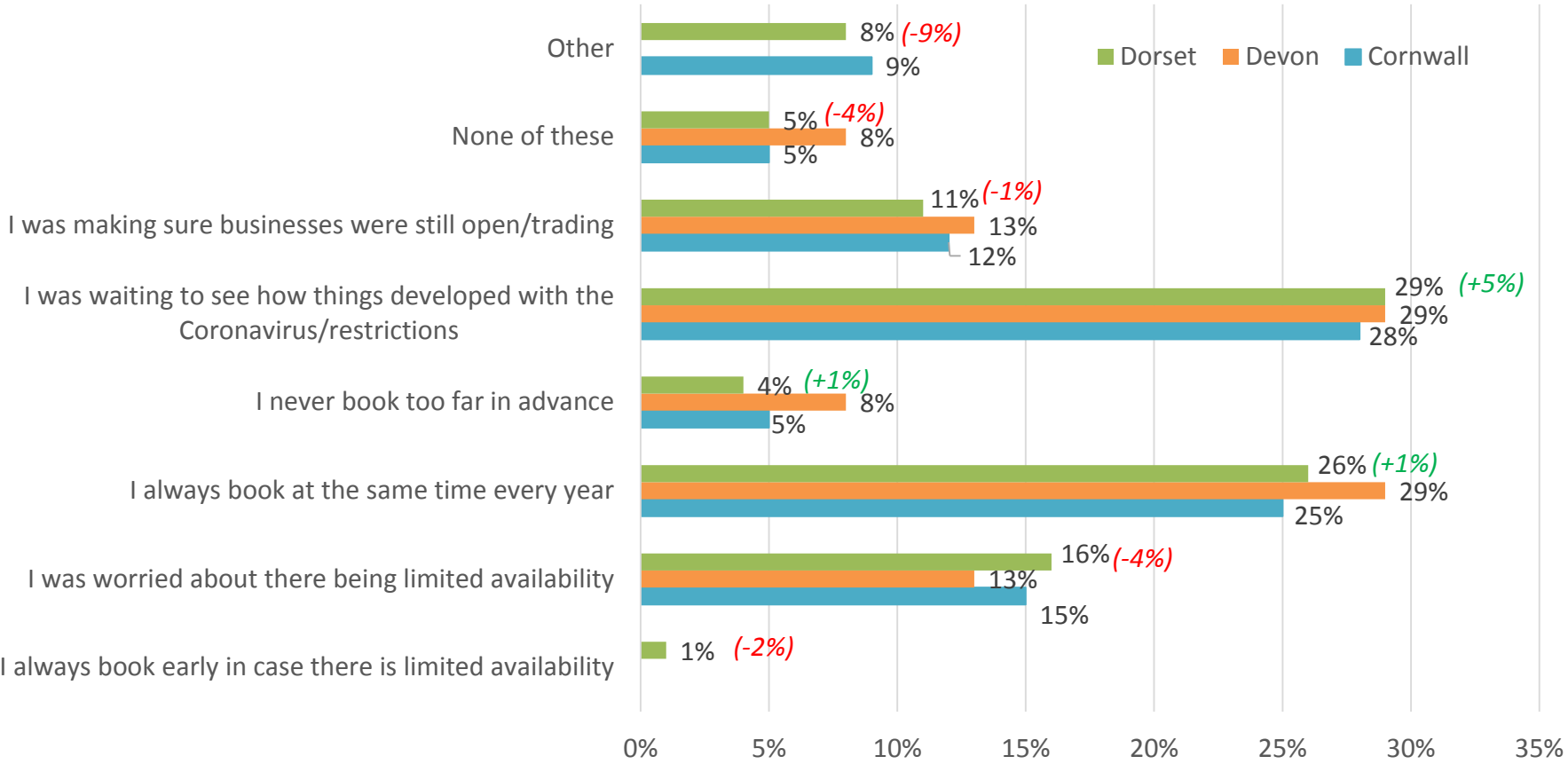
* Results exclude local residents ** Staying visitors only

Key statistics – Those booked/intending to visit in 2020

CORNWALL	DEVON	DORSET
10% already booked <i>(-8%)</i>	5% already booked <i>(-4%)</i>	7% already booked <i>(-6%)</i>
28% booked earlier this year - prior to lockdown <i>(+1%)</i>	39% booked earlier this year - prior to lockdown <i>(-8%)</i>	28% booked earlier this year - prior to lockdown <i>(-2%)</i>
16% booked during lockdown <i>(-1%)</i>	17% booked during lockdown <i>(+11%)</i>	16% booked during lockdown <i>(+2%)</i>
37% booked post lockdown <i>(+10%)</i>	39% booked post lockdown <i>(+7%)</i>	41% booked post lockdown <i>(+13%)</i>
18% booked last year <i>(-11%)</i>	6% booked last year <i>(-9%)</i>	15% booked last year <i>(-13%)</i>
5% intending to book – we estimate that 49% of these will actually go on to book <i>(-5% & -1%)</i>	3% intending to book – we estimate that 47% of these will actually go on to book <i>(-2% & -16%)</i>	5% intending to book – we estimate that 46% of these will actually go on to book <i>(-4% & -15%)</i>
8% will only be visiting for a leisure day out <i>(-4% July)</i>	11% will only be visiting for a leisure day out <i>(+1%)</i>	10% will only be visiting for a leisure day out <i>(-10%)</i>

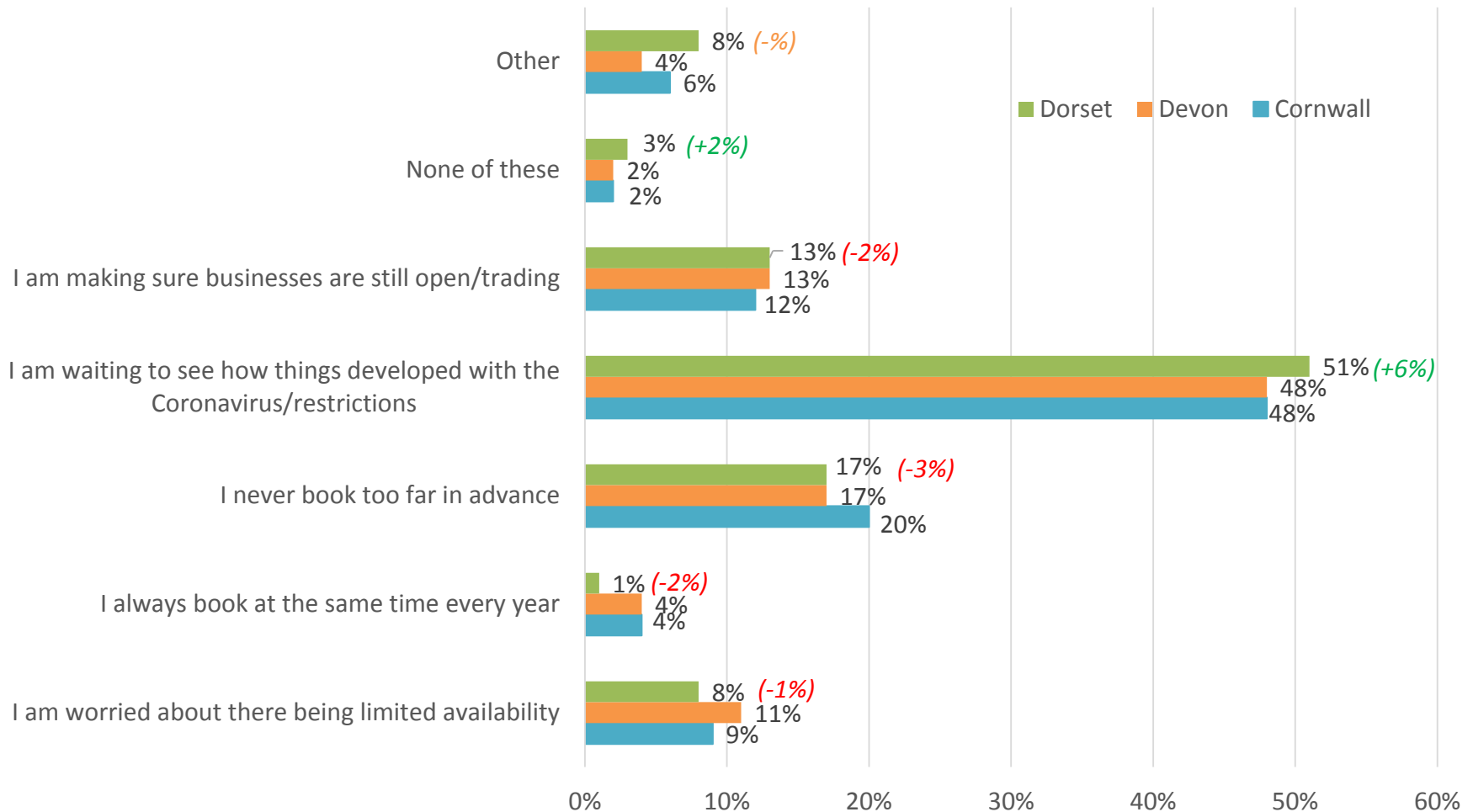
Those respondents who had already booked a 2020 holiday to Dorset were asked why they had booked when they did. 29% said they were waiting to see how things developed with the Coronavirus restrictions.

Reasons for timing of booking – those who have already booked a 2020 holiday

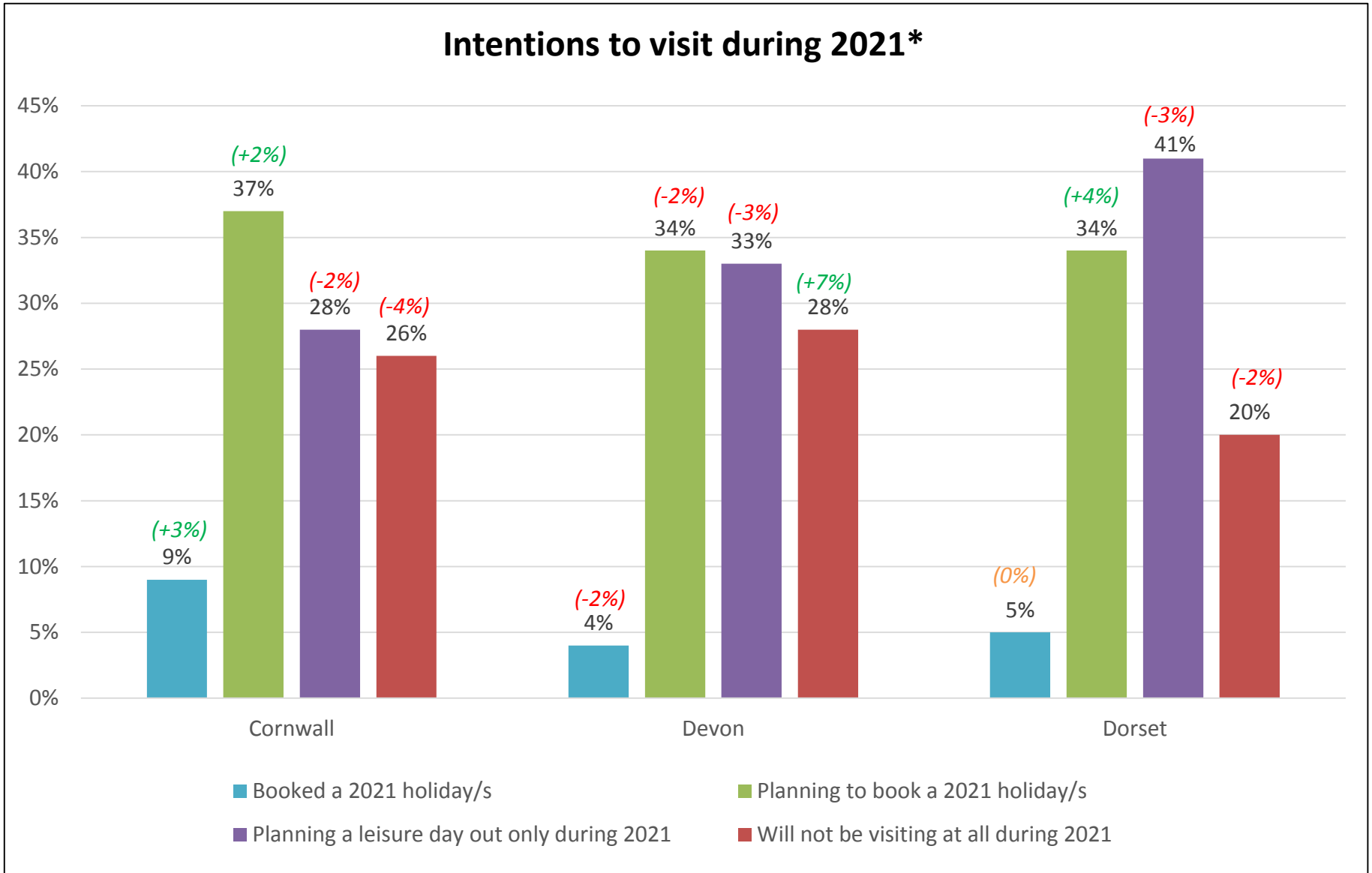


51% of respondents who have not yet booked a 2020 holiday to Dorset (but are planning to do so) are waiting to see how things developed with the Coronavirus restrictions.

Reasons for not yet booking – those planning to book a 2020 holiday



There was a +4% increase in the proportion of respondents (34%) planning to book a 2021 holiday to the county compared with the July survey.



* Respondents who only intended to visit for a leisure day out or did not plan to visit at all during 2020

Key statistics – Those booked/intending to visit in 2021

CORNWALL	DEVON	DORSET
9% already booked (+3%)	4% already booked (-2%)	5% already booked (5%)
37% intending to book – we estimate that 51% of these will actually go on to book (+2% & -2%)	34% intending to book – we estimate that 48% of these will actually go on to book (-2% & -16%)	34% intending to book – we estimate that 57% of these will actually go on to book (+4% & -6%)
28% will only be visiting for a leisure day out (-1%)	33% will only be visiting for a leisure day out (-3%)	41% will only be visiting for a leisure day out (-3%)

Key statistics – Those booked/intending to visit in 2020/2021

CORNWALL	DEVON	DORSET
28% delayed from original plans (+1%)	25% delayed from original plans (-3%)	27% delayed from original plans (-%)
81% delayed due to lockdown/closures/cancellations due to Coronavirus (-%)	88% delayed due to lockdown/closures/cancellations due to Coronavirus (+3%)	78% delayed due to lockdown/closures/cancellations due to Coronavirus (-3%)
44% waiting to see how things develop and if there is a second wave of Coronavirus (-%)	54% waiting to see how things develop and if there is a second wave of Coronavirus (+10%)	56% waiting to see how things develop and if there is a second wave of Coronavirus (+12%)
31% waiting for things to be quieter away from the main season (-%)	37% waiting to see if local lockdowns start to be put in place (+121%)	41% shielding due to Coronavirus (+7%)
11% intend to visit July to Sept 2020 (-27%)	6% intend to visit July to Sept 2020 (-33%)	21% intend to visit July to Sept 2020 (-22%)
29% intend to visit Oct to Dec 2020 (+4%)	26% intend to visit Oct to Dec 2020 (+3%)	30% intend to visit Oct to Dec 2020 (+8%)
12% intend to visit Jan to Mar 2021 (+1%)	10% intend to visit Jan to Mar 2021 (-1%)	7% intend to visit Jan to Mar 2021 (-3%)
47% intend to visit Apr to Jun 2021 (+7%)	50% intend to visit Apr to Jun 2021 (+7%)	46% intend to visit Apr to Jun 2021 (+4%)
37% intend to visit July to Sept 2021 (+3%)	37% intend to visit July to Sept 2021 (-6%)	38% intend to visit July to Sept 2021 (-%)
25% intend to visit Oct to Dec 2021 (+9%)	15% intend to visit Oct to Dec 2021 (-%)	22% intend to visit Oct to Dec 2021 (+6%)

Key statistics – Those not planning to visit before end of 2021

CORNWALL	DEVON	DORSET
26% of respondents who had not visited/or not planned to visit the county for a holiday during 2020 do not intend to visit the county before the end of 2021 – representing 13% of all respondents <i>(-4% and +3%)</i>	28% of respondents who had not visited/or not planned to visit the county for a holiday during 2020 do not intend to visit the county before the end of 2021 – representing 14% of all respondents <i>(+7% and +7%)</i>	20% of respondents who had not visited/or not planned to visit the county for a holiday during 2020 do not intend to visit the county before the end of 2021 – representing 6% of all respondents <i>(-2% and -5%)</i>
58% are waiting for things to settle down and return to normal* <i>(+18%)</i>	48% are waiting for things to settle down and return to normal* <i>(-2%)</i>	63% are waiting for things to settle down and return to normal* <i>(+17%)</i>
44% are waiting to see how things develop and if there is a second wave of Coronavirus* <i>(+5%)</i>	45% are waiting to see how things develop and if there is a second wave of Coronavirus* <i>(+5%)</i>	48% are waiting to see how things develop and if there is a second wave of Coronavirus* <i>(+4%)</i>
32% waiting to see if local lockdowns start to be put in place* <i>(+11%)</i>	43% fear of catching Coronavirus* <i>(+23%)</i>	34% never planned to visit before the end of 2021* <i>(-%)</i>
66% do plan to visit again at some stage though <i>(+14%)</i>	53% do plan to visit again at some stage though <i>(+8%)</i>	55% do plan to visit again at some stage though <i>(+3%)</i>
33% are unsure/don't know if they will visit again after 2021 <i>(-10%)</i>	44% are unsure/don't know if they will visit again after 2021 <i>(-11%)</i>	41% are unsure/don't know if they will visit again after 2021 <i>(-5%)</i>

* Previous visitors to the county only

Key statistics – Those not planning to visit after 2021

CORNWALL	DEVON	DORSET
1% do not intend to visit after 2021 (-4%)	2% do not intend to visit after 2021 (+2%)	3% do not intend to visit after 2021 (-%)
60% feel visitors are not welcome* (-13%)	1% never planned to visit Devon again (+1%)	50% have an other reason for not visiting* (-%)
40% had seen negative press/media coverage about Cornwall* (+13%)	-	-
40% have an other reason for not visiting* (-%)	-	-

* Previous visitors to the county only

Key statistics – Residents views

CORNWALL	DEVON	DORSET
-10% change in residents leisure visits (+41%)	-4% change in residents leisure visits (+2%)	-7% change in residents leisure visits (+4%)
82% are concerned there will be too many visitors here (-7%)	81% are waiting for things to be quieter away from the main season (+12%)	74% are concerned there will be too many visitors here (-12%)
72% are waiting for things to be quieter away from the main season (-10%)	81% are waiting to see how things develop and if there is a second wave of Coronavirus (+21%)	69% are waiting to see how things develop and if there is a second wave of Coronavirus (+3%)
71% are waiting to see how things develop and if there is a second wave of Coronavirus (+4%)	78% are concerned there will be too many visitors here (-3%)	61% said they are taking fewer leisure visits due to lockdown/ closures/ cancellations due to Coronavirus (+16%)
55% said they are taking fewer leisure visits due to lockdown/ closures/ cancellations due to Coronavirus (+23%)	53% said they are taking fewer leisure visits due to lockdown/ closures/ cancellations due to Coronavirus (+9%)	57% are waiting for things to be quieter away from the main season (-12%)
51% happy to welcome visitors (+9%)	63% happy to welcome visitors (+18%)	50% happy to welcome visitors (+1%)
21% not happy to welcome visitors (-7%)	13% not happy to welcome visitors (-13%)	20% not happy to welcome visitors (+2%)

* The percentage change in leisure visits figures above are calculated by deducting the % of respondents saying they will take 'more' visits from the % saying they will take 'less'. The score can range from -100% to +100%. The result is just an indication of the likely change of opinions rather than actual trip volumes.

Key statistics – Recognition of ‘Good to Go’ logo



CORNWALL
45% recognition
(+8%)

DORSET
47% recognition
(+1%)

DEVON
54% recognition
(+6%)

Key statistics – General changes to trip taking (+/- scores)

CORNWALL	DEVON	DORSET
-11% change in the number of holidays (4+ nights) taken in the future (-%)	-20% change in the number of holidays (4+ nights) taken in the future (+3%)	-19% change in the number of holidays (4+ nights) taken in the future (-%)
+13% change in the number of UK holidays (4+ nights) taken in the future (+1%)	+4% change in the number of UK holidays (4+ nights) taken in the future (+6%)	+5% change in the number of UK holidays (4+ nights) taken in the future (-2%)
-57% change in the number of overseas holidays (4+ nights) taken in the future (-1%)	-62% change in the number of overseas holidays (4+ nights) taken in the future (+1%)	-60% change in the number of overseas holidays (4+ nights) taken in the future (+1%)
+2% change in the number of leisure days out taken in the future (+4%)	+3% change in the number of leisure days out taken in the future (+7%)	+6% change in the number of leisure days out taken in the future (+4%)
+5% change in the number of short breaks (1-3 nights) taken in the future (+1%)	+2% change in the number of short breaks (1-3 nights) taken in the future (+6%)	+1% change in the number of short breaks (1-3 nights) taken in the future (+4%)
+9% change in the number of UK holidays (4+ nights) taken outside of the peak (July & August) holiday season in the future (-1%)	0% change in the number of UK holidays (4+ nights) taken outside of the peak (July & August) holiday season in the future (+4%)	+6% change in the number of UK holidays (4+ nights) taken outside of the peak (July & August) holiday season in the future (+5%)

* The percentage change in visit volume figures above are calculated by deducting the % of respondents saying they will take 'more' visits from the % saying they will take 'less'. The score can range from -100% to +100%. The result is just an indication of the likely change of opinions rather than actual trip volumes.

Key statistics – Attitudes to trip taking (+/- scores)

CORNWALL	DEVON	DORSET
I'm likely to seek quieter destinations for my holidays +53% (-9%)	I'm likely to seek quieter destinations for my holidays +59% (-6%)	I'm likely to seek quieter destinations for my holidays +51% (-3%)
Personal safety from Coronavirus doesn't really concern me when planning a holiday -56% (+2%)	Personal safety from Coronavirus doesn't really concern me when planning a holiday -54% (+6%)	Personal safety from Coronavirus doesn't really concern me when planning a holiday -56% (-1%)
I'm likely to holiday closer to home +11% (-3%)	I'm likely to holiday closer to home +30% (+1%)	I'm likely to holiday closer to home +24% (-3%)
I'm likely to holiday at a quieter time of the year +42% (-3%)	I'm likely to holiday at a quieter time of the year +50% (+8%)	I'm likely to holiday at a quieter time of the year +45% (+3%)
I don't envisage my holiday taking habits will change -9% (+8%)	I don't envisage my holiday taking habits will change -18% (+5%)	I don't envisage my holiday taking habits will change -15% (-3%)
I'm reluctant to plan any trips at present with so much uncertainty +48% (+8%)	I'm reluctant to plan any trips at present with so much uncertainty +51% (+18%)	I'm reluctant to plan any trips at present with so much uncertainty +49% (+13%)
The economy and personal finances will be the key factor in planning any holidays +27% (+6%)	The economy and personal finances will be the key factor in planning any holidays +26% (+7%)	The economy and personal finances will be the key factor in planning any holidays +19% (+1%)

* The percentage change scores above are calculated by deducting the % of respondents saying they 'Strongly agree' or 'agree' with the statement from the % of respondents saying they 'Disagree' or 'Strongly disagree' with the statement. The score can range from -100% to +100%. The result is just an indication of the likely level of agreement with the statement rather than actual trip volumes.

Dorset – What would encourage more holidays/leisure days

A fall in Covid-19 rates & businesses following all the rules at all times.

A Coronavirus vaccine.

A weakening of the virus, an improvement in the general mood of the country, fewer restrictions.

A reduction in visitor numbers at the places I love.

Accommodation making serious efforts to ensure safety, cleaning etc. I have no intention of going abroad on a plane at the moment so am likely to take more UK holidays as holidays are important to sustain positive mental health.

An end to all restrictions relating to the Coronavirus pandemic.

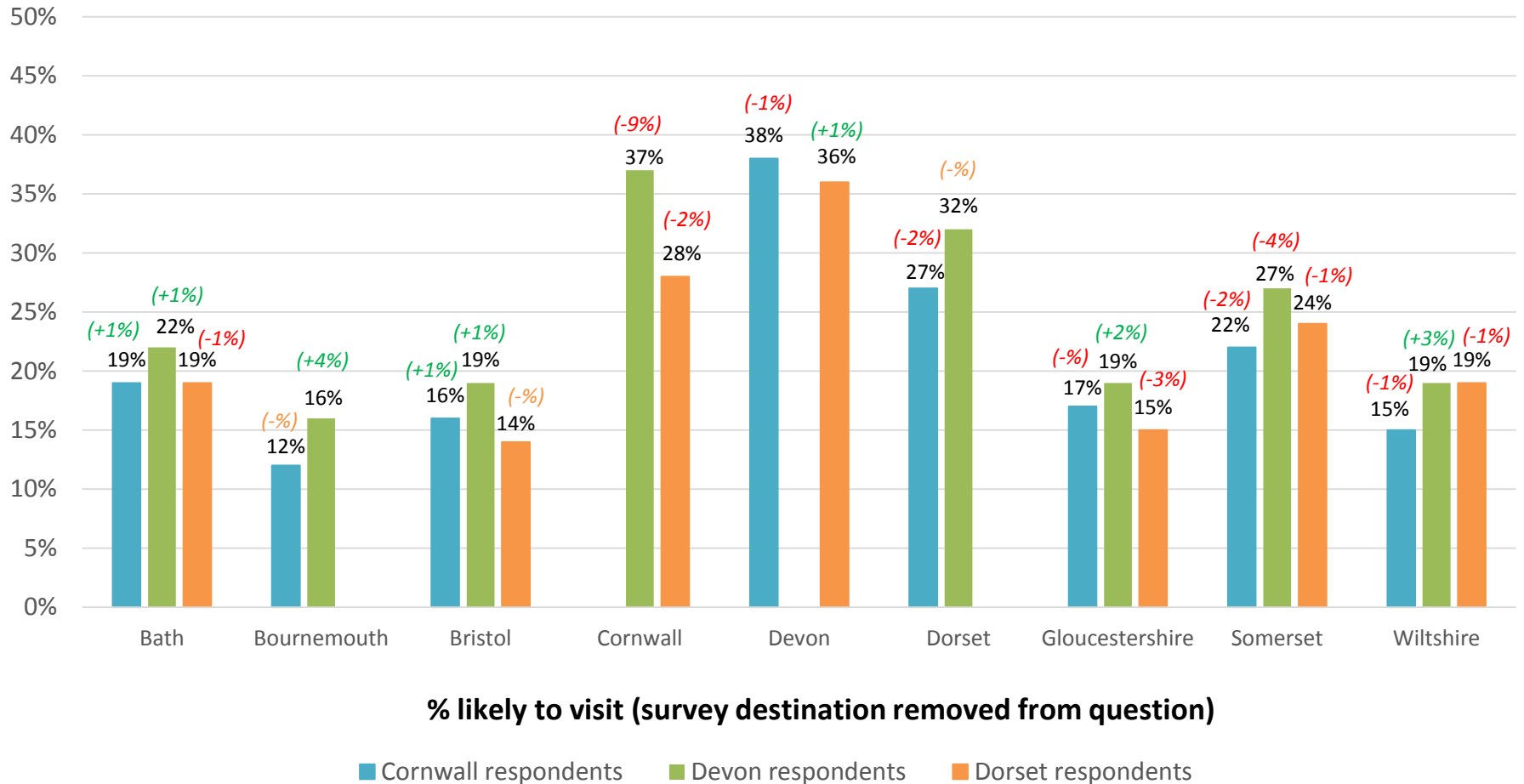
Assurance of a full refund if Covid should take off again or the Government announces further lockdowns.

Availability of a good hotel at sensible rates in a viable position.
Places to go, things to see and an array of good restaurants.

Being able to go to places with limited numbers i.e. avoiding crowds / busyness.

27% of Cornwall respondents are likely to visit Dorset for a staying holiday before the end of 2021, a decrease of -2% compared with the July survey. 32% of Devon respondents would be likely to visit (no change compared with July survey).

Likelihood to visit South West destinations for a staying holiday before the end of 2021



The results above are weighted based on whether respondents were 'definitely', 'probably' or 'possibly' going to visit the destination.

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