

# COVID-19 Visitor Intentions Survey

## July 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

August 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 24<sup>th</sup> March 2020. These measures remained in place for tourism and hospitality businesses until Saturday 4<sup>th</sup> 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.

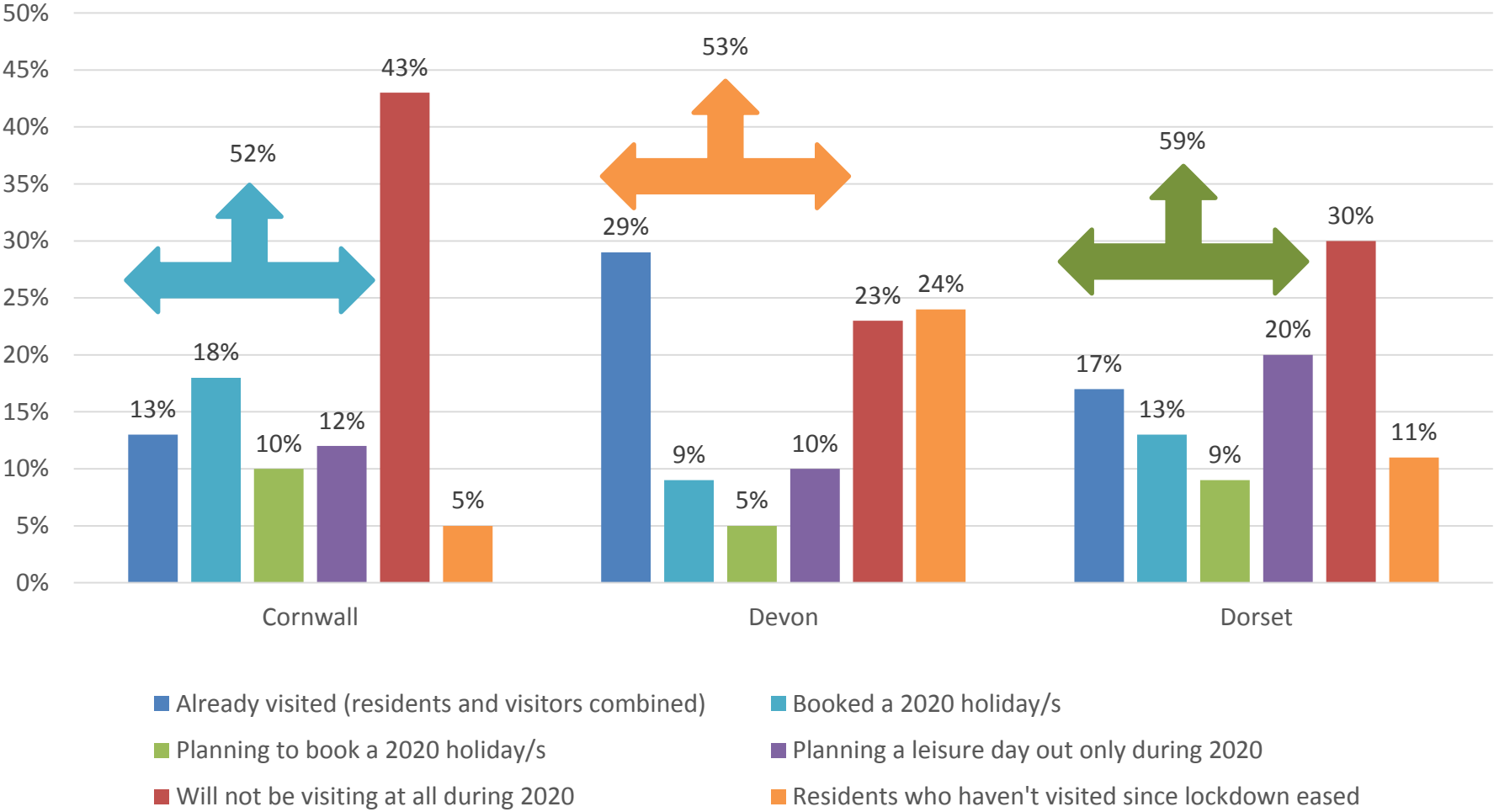
This report contains a summary of the key findings for the first visitor intentions surveys conducted during late July/early August for Cornwall, Devon and Dorset using consumer email databases and from promoting the survey links on social media channels.

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.

59% of respondents had already visited, booked a holiday/s or planned to visit Dorset for a holiday or leisure day out during 2020.

### Intentions to visit during 2020 (since easing of lockdown and re-opening 4<sup>th</sup> July)



# Key statistics - Those visiting since lockdown\*

CORNWALL	DEVON	DORSET
92% staying visitors	81% staying visitors	<b>75% staying visitors</b>
90% of day visitors visited a familiar location	60% of day visitors visited a familiar location	<b>88% of day visitors visited a familiar location</b>
90% of staying visitors stayed at a familiar destination	73% of staying visitors stayed at a familiar destination	<b>84% of staying visitors stayed at a familiar destination</b>
56% of staying visitors stayed at familiar accommodation	59% of staying visitors stayed at accommodation they were using for the first time	<b>66% of staying visitors stayed at familiar accommodation</b>
96% were made to feel welcome	96% were made to feel welcome	<b>98% were made to feel welcome</b>
96% were happy with measures taken to protect them from Coronavirus**	96% were happy with measures taken to protect them from Coronavirus**	<b>97% were happy with measures taken to protect them from Coronavirus**</b>
Recommendation score +68%**	Recommendation score +74%**	<b>Recommendation score +78%**</b>

\* Results exclude local residents

\*\* Results include local residents

# Dorset – Those visiting since lockdown comments relating to welcome

Covid safe contactless check in but lots of information provided. All shops pubs restaurants etc. that we visited were very helpful explaining new process etc. and very friendly.

Chalet owners explained the precautions they had taken re Covid-19.  
Restaurant/shop owners displaying clear signage re their expectations.

Hotel was welcoming and well organised to cope with Covid-19. Pubs and restaurants were very welcoming and distancing issues did not stop us enjoying ourselves.

People who live and work in Dorset are very happy and friendly.

People were quite friendly.  
Very good services in the cafes and pubs.

Everyone is always friendly. Staff are lovely in shops and restaurants.

Friendly locals.

Facilities I visited were open pretty much as normal.

I was made to feel welcome by all members of staff in the holiday park, shops & cafe around the bay

# Visitor satisfaction - Those visiting since lockdown\*

Mean satisfaction scores on a scale of 1 to 5 – The higher the score the higher the satisfaction	CORNWALL	DEVON	DORSET
Accommodation – range open	4.57	4.68	<b>4.65</b>
Accommodation - quality of service	4.64	4.75	<b>4.64</b>
Accommodation - provisions made for your personal safety	4.62	4.65	<b>4.63</b>
Visitor attractions & places to visit – range open	4.21	4.21	<b>4.24</b>
Visitor attractions & places to visit - quality of service	4.49	4.43	<b>4.52</b>
Visitor attractions & places to visit - provisions made for your personal safety	4.50	4.48	<b>4.48</b>
Places to eat & drink – range open	4.31	4.23	<b>4.25</b>
Places to eat & drink - quality of service	4.52	4.53	<b>4.55</b>
Places to eat & drink - provisions made for your personal safety	4.50	4.54	<b>4.49</b>
Public toilets – availability	3.40	3.31	<b>3.63</b>
Public toilets - provisions made for your personal safety	3.71	3.62	<b>3.82</b>
Nightlife/evening entertainment – range open	3.71	3.43	<b>3.38</b>
Nightlife/evening entertainment – quality	4.14	4.11	<b>4.12</b>
Nightlife/evening entertainment - provisions made for your personal safety	4.20	4.00	<b>4.20</b>
Overall impression in terms of - General atmosphere	4.53	4.59	<b>4.61</b>
Overall impression in terms of - provisions made for your personal safety	4.47	4.50	<b>4.51</b>
Overall impression in terms of – enjoyment of visit	4.62	4.66	<b>4.74</b>

\* Results include local residents

# Dorset – Those visiting since lockdown what worked well

Friendly staff.

Cleanliness.

Feeling/felt safe.

Social distancing.

Hand sanitiser.

Clear signage/instructions.

One way systems.

Pre-booking.

Safety measures.

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

Booking in advance.

Crowded locations.

Crowds on Bournemouth beach.

Hardly any public toilets open.

Lack of social distancing enforcement.

Litter / not enough bins.

Not enough things open.

Other people who are inconsiderate of distancing.

Overcrowding.

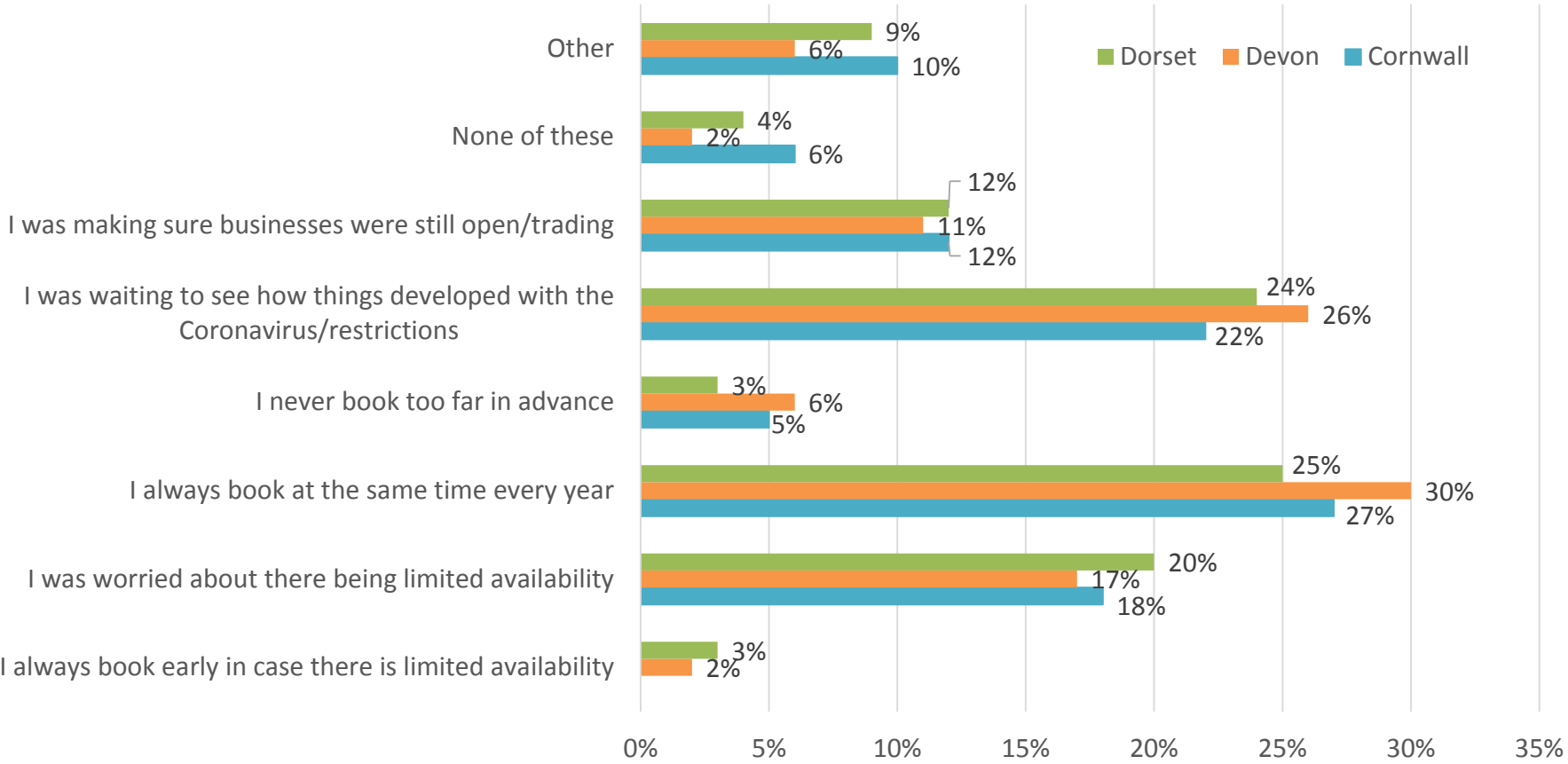


# Key statistics – Those booked/intending to visit in 2020

CORNWALL	DEVON	DORSET
18% already booked	9% already booked	<b>13% already booked</b>
27% booked earlier this year - prior to lockdown	47% booked earlier this year - prior to lockdown	<b>30% booked earlier this year - prior to lockdown</b>
17% booked during lockdown	6% booked during lockdown	<b>14% booked during lockdown</b>
27% booked post lockdown	32% booked post lockdown	<b>28% booked post lockdown</b>
29% booked last year	15% booked last year	<b>28% booked last year</b>
10% intending to book – we estimate that 50% of these will actually go on to book	5% intending to book – we estimate that 63% of these will actually go on to book	<b>9% intending to book – we estimate that 61% of these will actually go on to book</b>
12% will only be visiting for a leisure day out	10% will only be visiting for a leisure day out	<b>20% will only be visiting for a leisure day out</b>

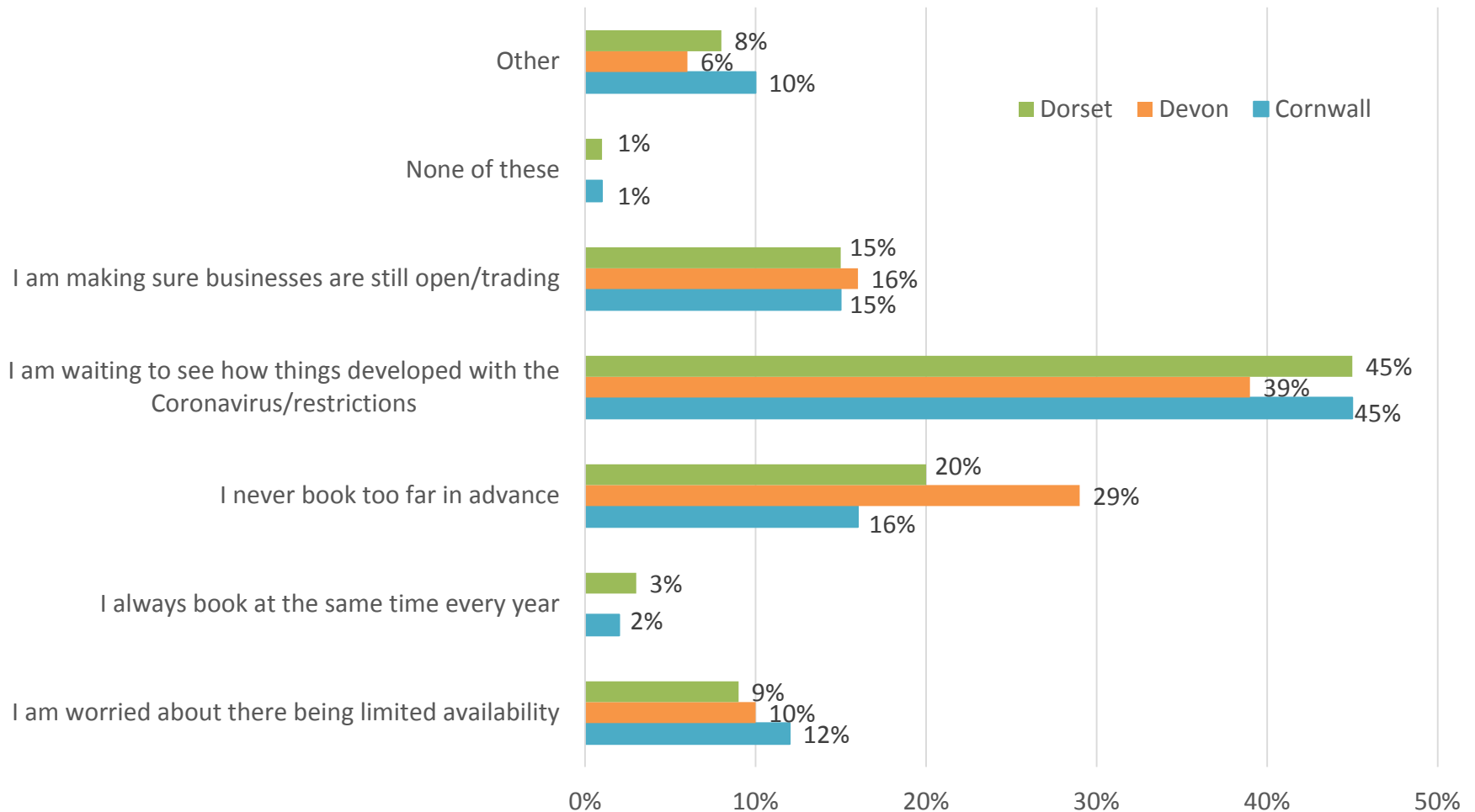
25% of respondents who had already booked a 2020 holiday to Dorset said they always booked at the same time every year. 24% were waiting to see how things developed with the Coronavirus restrictions.

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

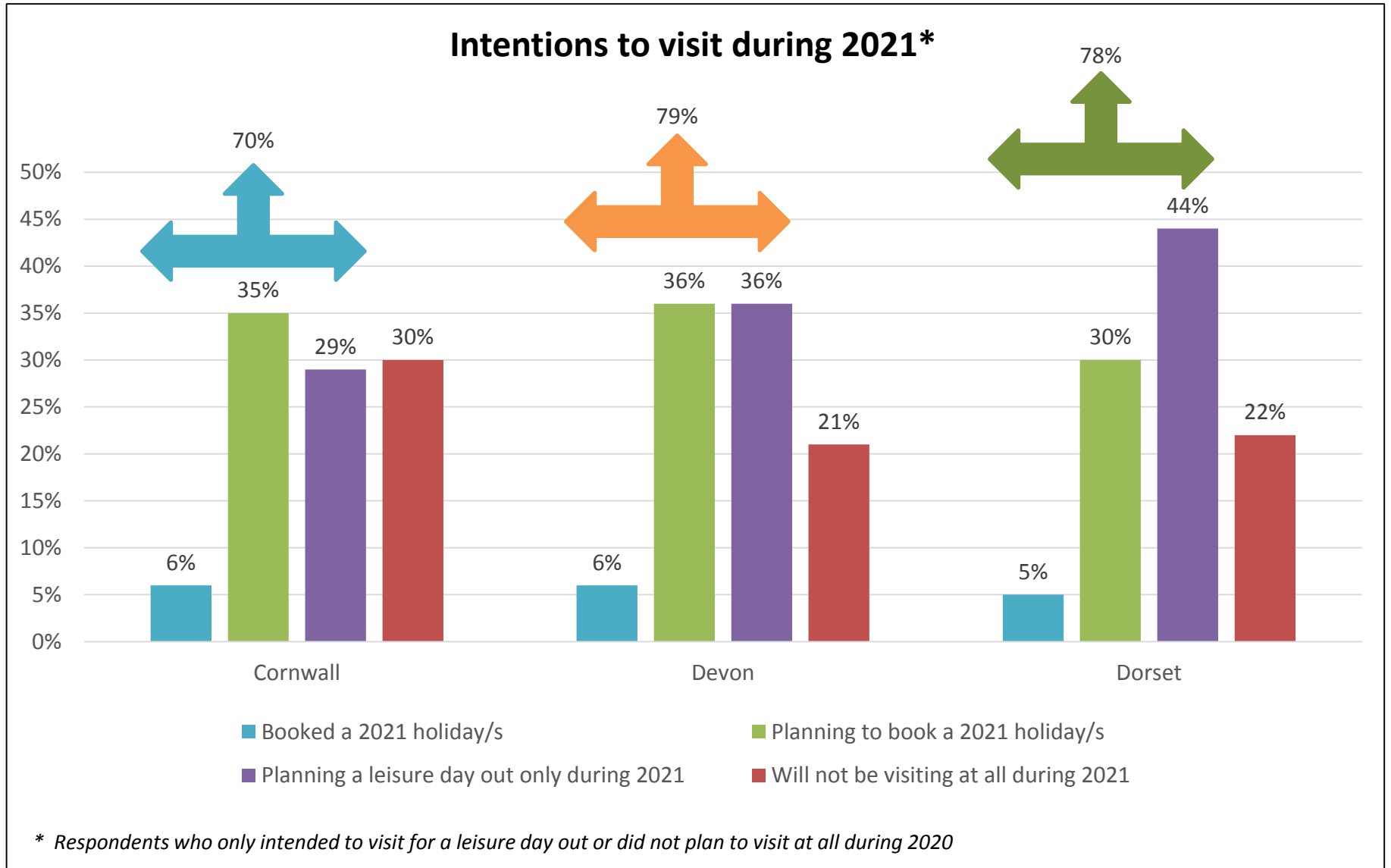


45% of respondents who have not yet booked a 2020 holiday to Dorset (but are planning to do so) are waiting to see how things developed with the Coronavirus restrictions.

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



78% of respondents\* had already booked a holiday/s or planned to visit Dorset for a holiday or leisure day out during 2021.



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

CORNWALL	DEVON	DORSET
6% already booked	6% already booked	<b>5% already booked</b>
35% intending to book – we estimate that 53% of these will actually go on to book	36% intending to book – we estimate that 64% of these will actually go on to book	<b>30% intending to book – we estimate that 63% of these will actually go on to book</b>
29% will only be visiting for a leisure day out	36% will only be visiting for a leisure day out	<b>44% will only be visiting for a leisure day out</b>

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

CORNWALL	DEVON	DORSET
27% delayed from original plans	28% delayed from original plans	<b>27% delayed from original plans</b>
81% delayed due to lockdown/closures/cancellations due to Coronavirus	85% delayed due to lockdown/closures/cancellations due to Coronavirus	<b>81% delayed due to lockdown/closures/cancellations due to Coronavirus</b>
44% waiting to see how things develop and if there is a second wave of Coronavirus	44% waiting to see how things develop and if there is a second wave of Coronavirus	<b>44% waiting to see how things develop and if there is a second wave of Coronavirus</b>
31% waiting for things to be quieter away from the main season	33% shielding due to Coronavirus	<b>34% shielding due to Coronavirus</b>
38% intend to visit July to Sept 2020	39% intend to visit July to Sept 2020	<b>43% intend to visit July to Sept 2020</b>
25% intend to visit Oct to Dec 2020	23% intend to visit Oct to Dec 2020	<b>22% intend to visit Oct to Dec 2020</b>
11% intend to visit Jan to Mar 2021	11% intend to visit Jan to Mar 2021	<b>10% intend to visit Jan to Mar 2021</b>
40% intend to visit Apr to Jun 2021	43% intend to visit Apr to Jun 2021	<b>42% intend to visit Apr to Jun 2021</b>
34% intend to visit July to Sept 2021	43% intend to visit July to Sept 2021	<b>38% intend to visit July to Sept 2021</b>
16% intend to visit Oct to Dec 2021	15% intend to visit Oct to Dec 2021	<b>16% intend to visit Oct to Dec 2021</b>

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

CORNWALL	DEVON	DORSET
30% of respondents who had not visited/or planned to visit the county for a holiday during 2020 do not intend to visit the county before the end of 2021 (16% of all respondents)	21% of respondents who had not visited/or planned to visit the county for a holiday during 2020 do not intend to visit the county before the end of 2021 (7% of all respondents)	<b>22% of respondents who had not visited/or planned to visit the county for a holiday during 2020 do not intend to visit the county before the end of 2021 (11% of all respondents)</b>
40% are waiting for things to settle down and return to normal*	50% are waiting for things to settle down and return to normal*	<b>46% are waiting for things to settle down and return to normal*</b>
39% are waiting to see how things develop and if there is a second wave of Coronavirus*	40% are waiting to see how things develop and if there is a second wave of Coronavirus*	<b>44% are waiting to see how things develop and if there is a second wave of Coronavirus*</b>
30% are waiting to see if visitors are welcomed*	30% never planned to visit before the end of 2021*	<b>34% never planned to visit before the end of 2021*</b>
52% do plan to visit again at some stage though	45% do plan to visit again at some stage though	<b>52% do plan to visit again at some stage though</b>
43% are unsure/don't know if they will visit again after 2021	55% are unsure/don't know if they will visit again after 2021	<b>46% are unsure/don't know if they will visit again after 2021</b>

\* Previous visitors to the county only

# Key statistics – Those not planning to visit after 2021

CORNWALL	DEVON	DORSET
5% do not intend to visit after 2021	No respondents said they do not intend to visit after 2021	<b>3% do not intend to visit after 2021</b>
40% feel visitors are not welcome*	-	<b>50% never planned to visit Dorset*</b>
40% gave an other reason for not visiting*	-	<b>50% have an other reason for not visiting*</b>
27% had seen negative press/media coverage about Cornwall*	-	-



# Key statistics – Residents views

CORNWALL	DEVON	DORSET
-51% change in residents leisure visits	-6% change in residents leisure visits	<b>-11% change in residents leisure visits</b>
89% are concerned there will be too many visitors here	81% are concerned there will be too many visitors here	<b>86% are concerned there will be too many visitors here</b>
82% are waiting for things to be quieter away from the main season	69% are waiting for things to be quieter away from the main season	<b>69% are waiting for things to be quieter away from the main season</b>
67% are waiting to see how things develop and if there is a second wave of Coronavirus	60% are waiting to see how things develop and if there is a second wave of Coronavirus	<b>66% are waiting to see how things develop and if there is a second wave of Coronavirus</b>
42% happy to welcome visitors	45% happy to welcome visitors	<b>49% happy to welcome visitors</b>
28% not happy to welcome visitors	26% not happy to welcome visitors	<b>18% not happy to welcome visitors</b>

\* 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**  
37% recognition

**DORSET**  
46% recognition

**DEVON**  
48% recognition

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

CORNWALL	DEVON	DORSET
-11% change in the number of holidays (4+ nights) taken in the future	-23% change in the number of holidays (4+ nights) taken in the future	<b>-19% change in the number of holidays (4+ nights) taken in the future</b>
+12% change in the number of UK holidays (4+ nights) taken in the future	-2% change in the number of UK holidays (4+ nights) taken in the future	<b>+7% change in the number of UK holidays (4+ nights) taken in the future</b>
-56% change in the number of overseas holidays (4+ nights) taken in the future	-63% change in the number of overseas holidays (4+ nights) taken in the future	<b>-61% change in the number of overseas holidays (4+ nights) taken in the future</b>
-2% change in the number of leisure days out taken in the future	-4% change in the number of leisure days out taken in the future	<b>+2% change in the number of leisure days out taken in the future</b>
+4% change in the number of short breaks (1-3 nights) taken in the future	-4% change in the number of short breaks (1-3 nights) taken in the future	<b>-3% change in the number of short breaks (1-3 nights) taken in the future</b>
+10% change in the number of UK holidays (4+ nights) you take outside of the peak (July & August) holiday season taken in the future	-4% change in the number of UK holidays (4+ nights) you take outside of the peak (July & August) holiday season taken in the future	<b>+1% change in the number of UK holidays (4+ nights) you take outside of the peak (July &amp; August) holiday season taken in the future</b>

\* 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 +62%	I'm likely to seek quieter destinations for my holidays +65%	<b>I'm likely to seek quieter destinations for my holidays +54%</b>
Personal safety from Coronavirus doesn't really concern me when planning a holiday -58%	Personal safety from Coronavirus doesn't really concern me when planning a holiday -60%	<b>Personal safety from Coronavirus doesn't really concern me when planning a holiday -55%</b>
I'm likely to holiday closer to home +14%	I'm likely to holiday closer to home +29%	<b>I'm likely to holiday closer to home +27%</b>
I'm likely to holiday at a quieter time of the year +45%	I'm likely to holiday at a quieter time of the year +42%	<b>I'm likely to holiday at a quieter time of the year +42%</b>
I don't envisage my holiday taking habits will change -17%	I don't envisage my holiday taking habits will change -23%	<b>I don't envisage my holiday taking habits will change -12%</b>
I'm reluctant to plan any trips at present with so much uncertainty +40%	I'm reluctant to plan any trips at present with so much uncertainty +33%	<b>I'm reluctant to plan any trips at present with so much uncertainty +36%</b>
The economy and personal finances will be the key factor in planning any holidays +21%	The economy and personal finances will be the key factor in planning any holidays +19%	<b>The economy and personal finances will be the key factor in planning any holidays +18%</b>

\* 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 big reduction in Covid-19.  
Reduction of social distancing within the leisure industry (restaurants/pubs).

A booming economy, dry weather and my health.

A Covid vaccine.

A safe environment.

Accommodation prices going down and also more pubs/restaurants re-opening as some are still closed.

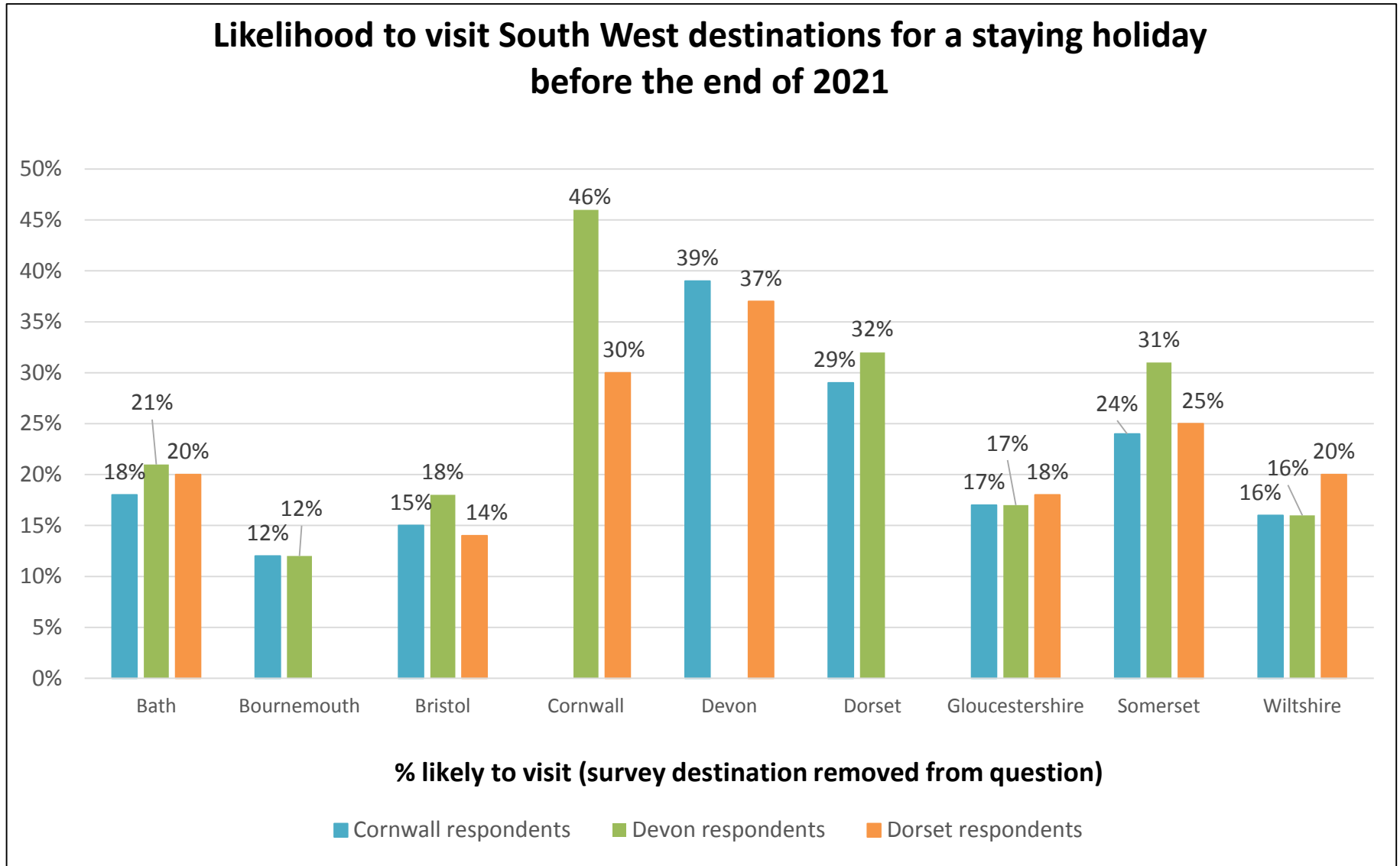
Adherence to safety measures and less selfish ignorant people around.

Assurance of all safety measures are in place.  
Special deals.

Attractions being open safely.

Availability of accommodation - holiday cottages, want to book but limited availability.

29% of Cornwall respondents and 32% of Devon respondents would be likely to visit Dorset 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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[www.tswrc.co.uk](http://www.tswrc.co.uk)

