

# ERBID

## 2022 overview

Prepared by The South West Research Company Ltd

September 2023



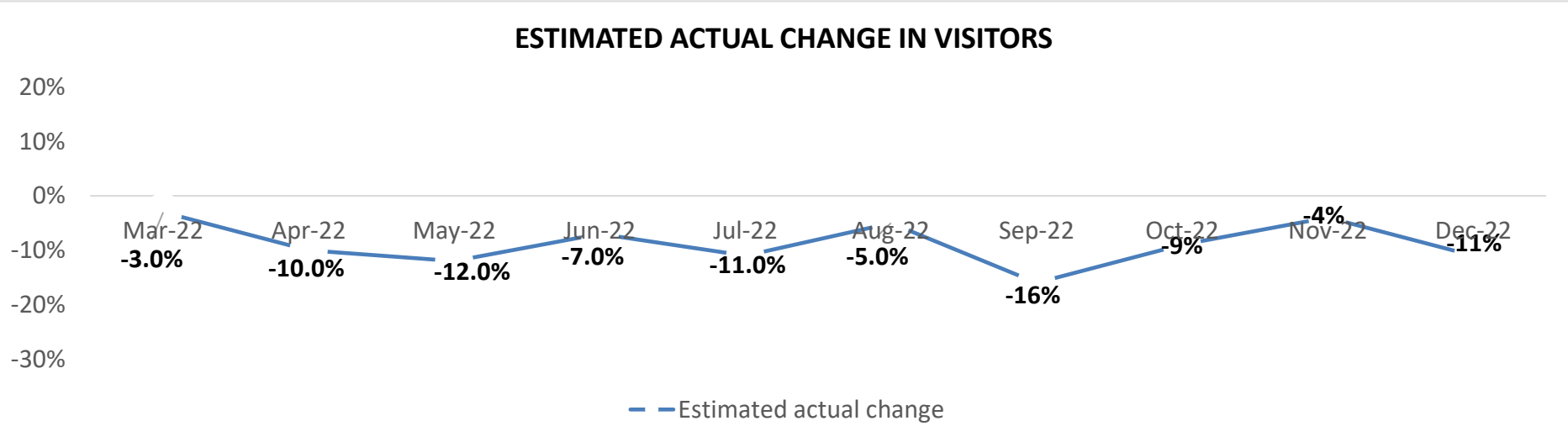
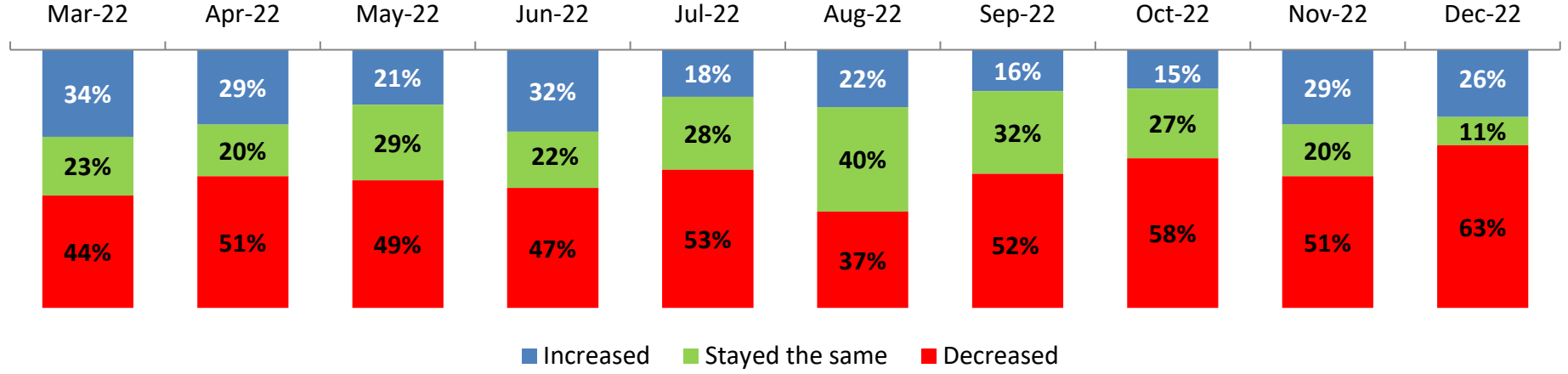
## Key methodology points

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- Current estimates for 2022 are provisional and are modelled from a mix of national tourism survey data and local How's Business data collected across 2022.
- Whilst domestic tourism data for 2022 has now been released (12<sup>th</sup> September 2022) further levels of detail and geographical breakdowns are required to finalise the domestic staying visitor outputs.
- However, the local level data is good and we don't expect to see any significant shifts in the final outputs.
- The How's Business survey recommenced in Torbay in March 2022 when Covid restrictions were lifted. The more Covid focussed survey that ran throughout the pandemic estimated a poor start to the year (January and February) due to the Omicron variant of the virus.

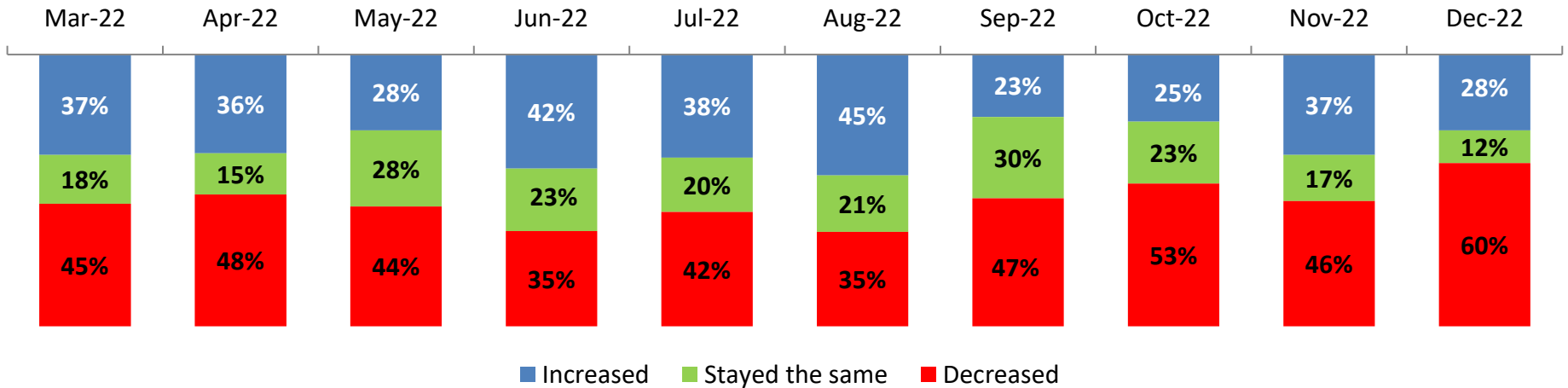
# How's Business Performance – Number of visitors in 2022 compared to 2019

- Decreases in visitor numbers estimated across the year compared to 2019.

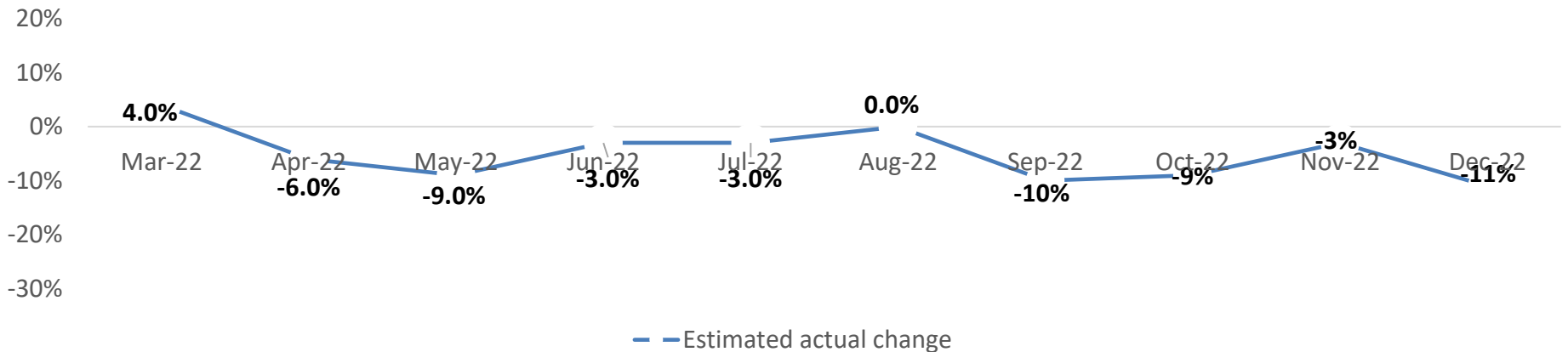


# How's Business Performance – Business turnover in 2022 compared to 2019

- Decreases in business turnover also estimated across the year compared to 2019, except for March (+4%) and August (no change). Decreases were proportionately smaller than decreases in visitors.

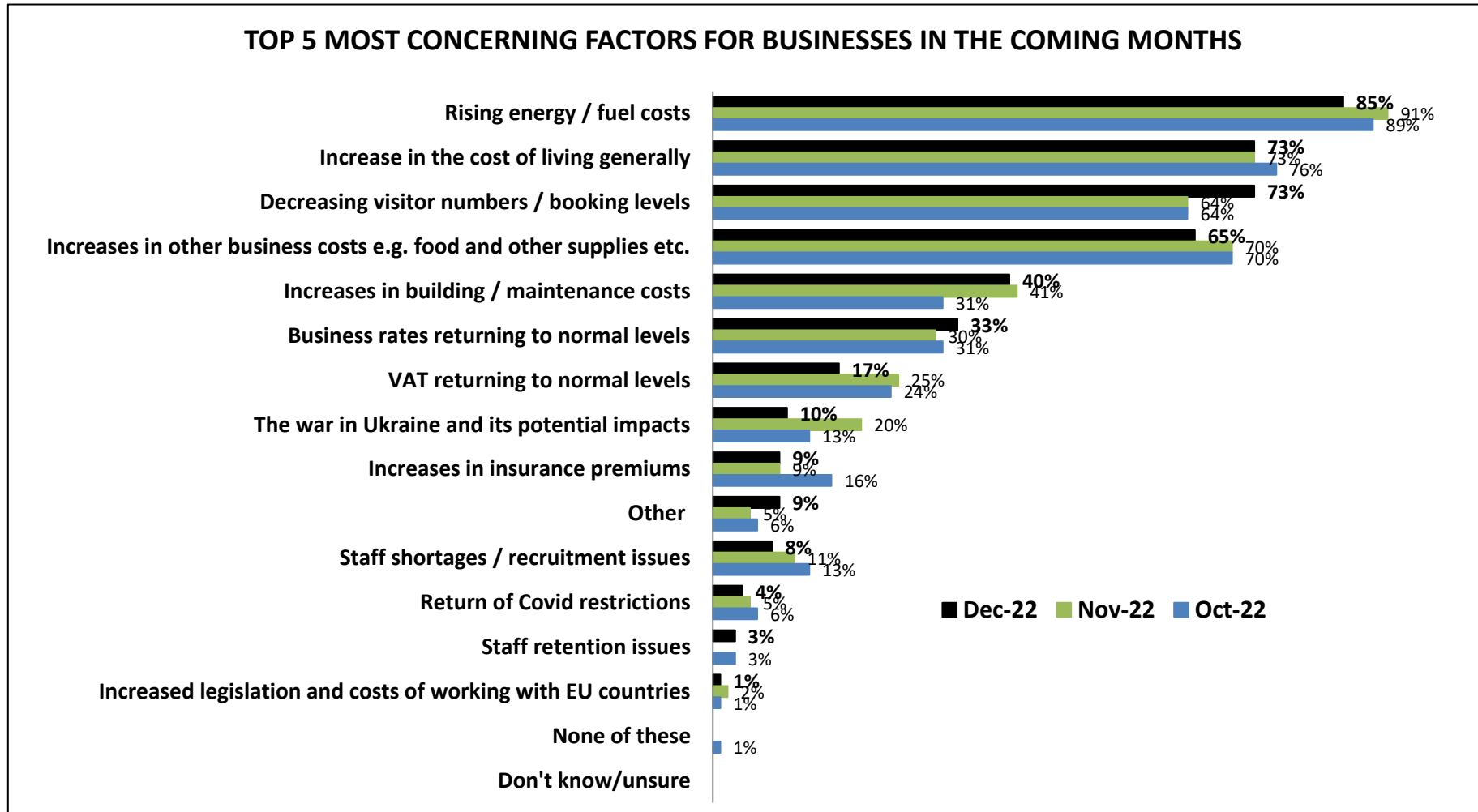


## ESTIMATED ACTUAL CHANGE IN TURNOVER



## Top 5 business concerns (pre-defined list)

- Increases in business and the cost of living, alongside decreasing visitor numbers/bookings dominated business concerns in the last quarter of 2022.



# National confirmation

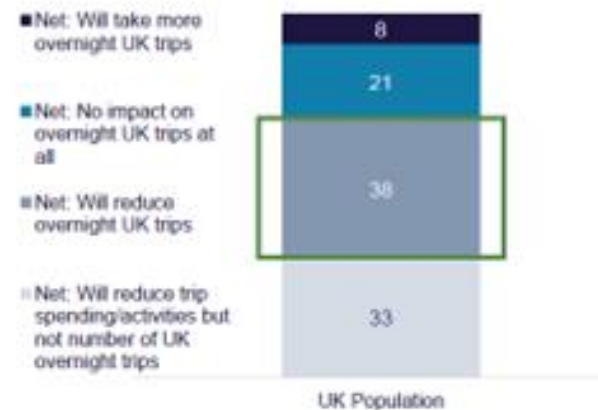
- The VisitEngland sentiment tracker from July 2022 confirmed a reduction in trip taking and consumers cutting back. The cost of living crisis was already firmly in consumers minds by mid-2022.

**The 'cost of living' crisis may be one of these circumstances – back in July this year 38% stating they will reduce the number of domestic trips as a result of financial pressures.**

Figure 19. 'Cost of living' impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Full list



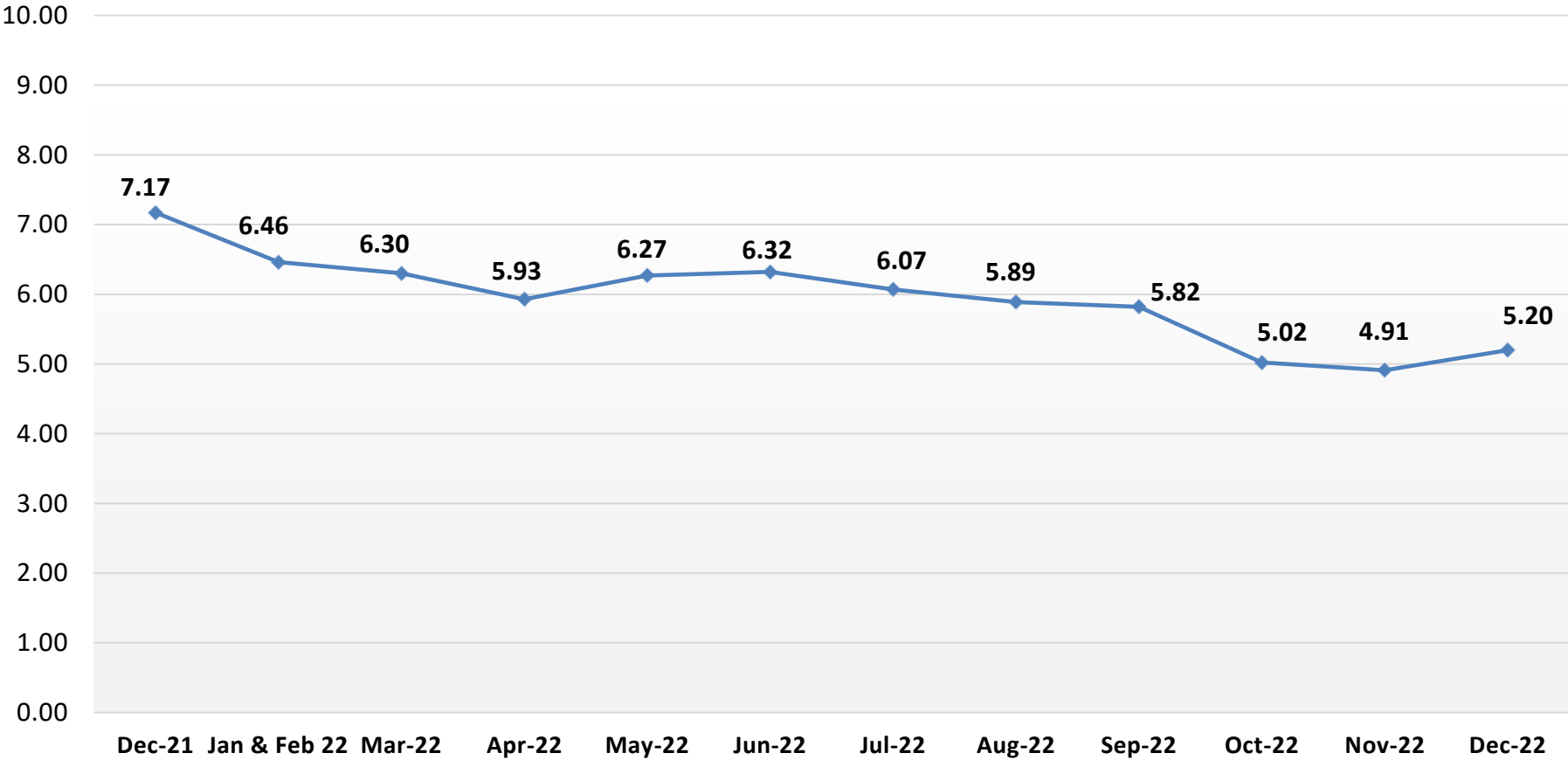
Figure 20. 'Cost of living' impact on UK holidays and short breaks, Percentage, July fieldwork, UK, Net



# Business optimism

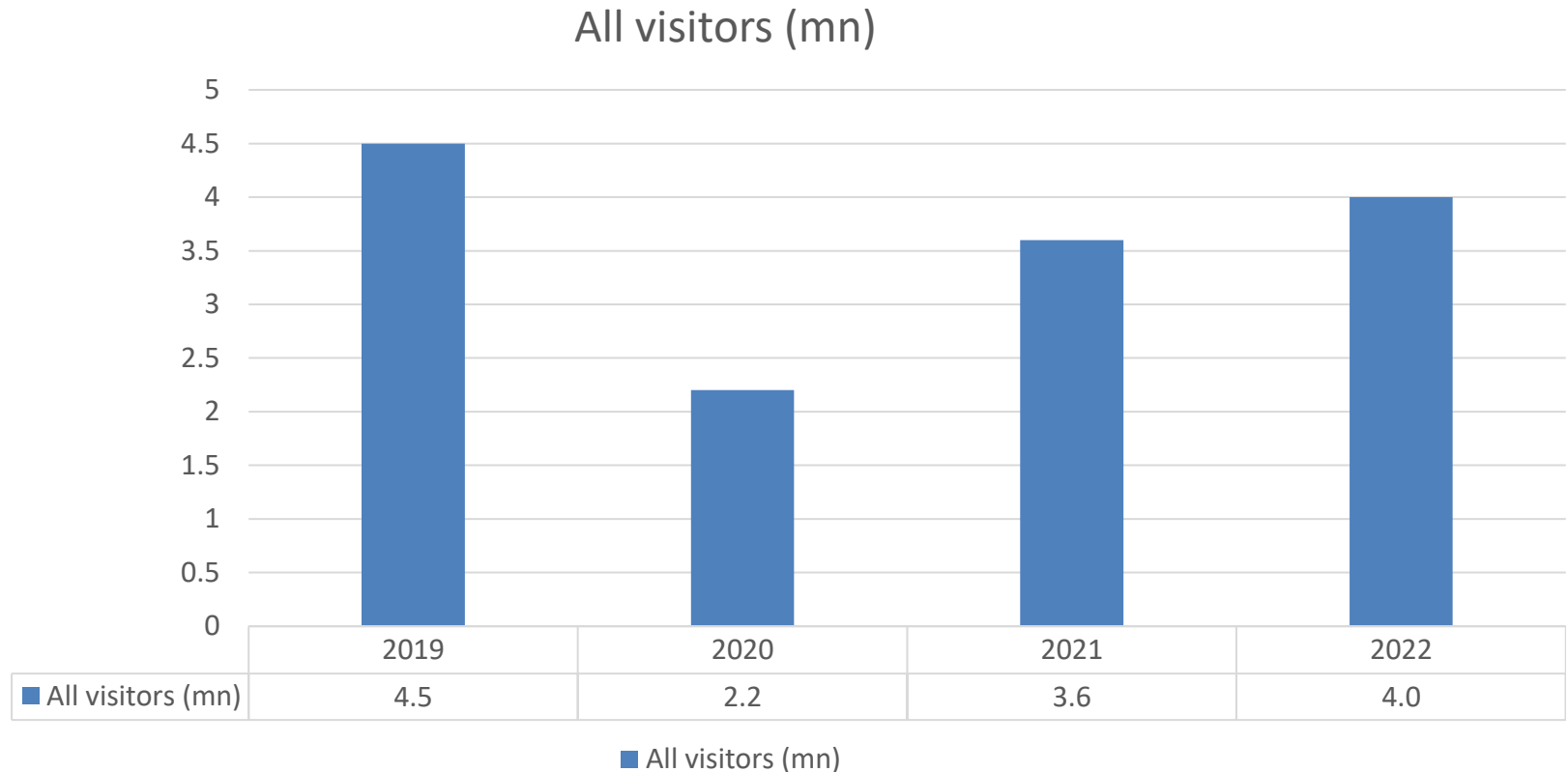
- The English Riviera How's Business optimism score decreased fairly steadily across the year supporting the decreases in business levels suggested.

**BUSINESS OPTIMISM (MAXIMUM SCORE OF 10)**



## 2022 provisional estimates – all visitors (day and staying)

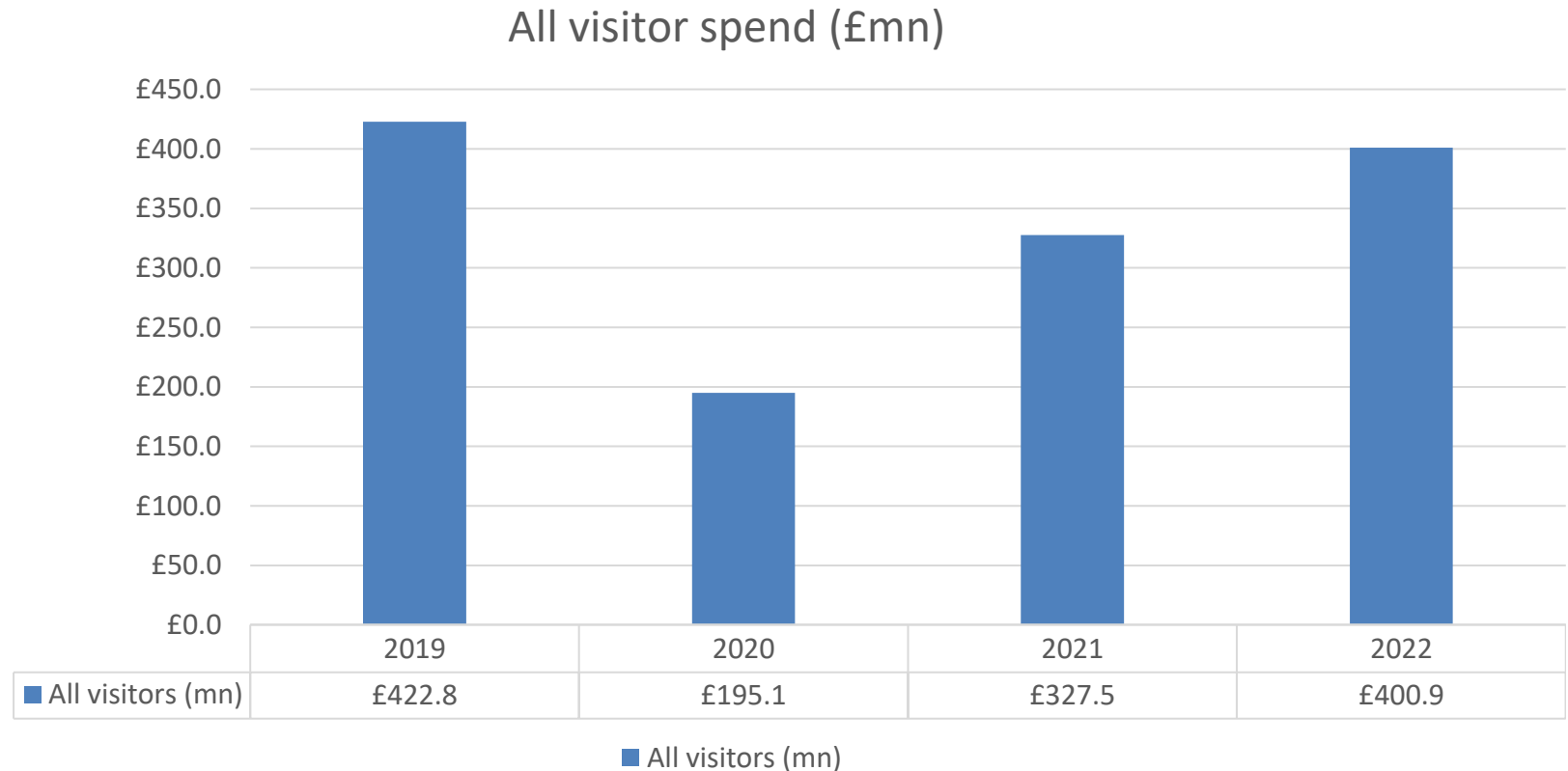
- The graph clearly shows the recovery in visitor numbers post Covid with increases in 2021 (+62% compared to 2020) and 2022 (+10% compared to 2021).
- However, visitor numbers in 2022 were still 13% lower than pre-pandemic (2019).





## 2022 provisional estimates – all visitor spend (day and staying)

- The graph again shows the recovery post Covid for all visitor spend with increases in 2021 (+68% compared to 2020) and 2022 (+22% compared to 2021).
- However, visitor spend in 2022 was still 5% lower than pre-pandemic (2019), despite rising inflation as visitors became more cash conscious in their leisure time.



## 2022 provisional estimates – other key estimates

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### In 2022 on the English Riviera it is estimated that;

- Domestic trips to the English Riviera were 15% lower than in 2019 and spend 5% lower.
- Overseas visitors were on the increase again after huge decreases in 2020 and 2021 due to travel restrictions. However, in 2022 overseas trips were still 31% lower than in 2019 and spend 17% lower.
- All staying visitors combined (UK plus overseas) were 16% lower than in 2019 and spend 6% lower.
- Day visits to the English Riviera in 2022 were estimated to be 12% lower than in 2019 and day visitor spend 3% lower.

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