





# An online survey of tourists who holidayed in Northern Devon in 2021: survey instrument and method























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# Acknowledgements

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#### Project context

The Bio-Cultural Heritage Tourism project is an EU Interreg project involving four UNESCO Biosphere Reserves (North Devon Biosphere Reserve, Brighton and Lewes Downs Biosphere Reserve, Réserve de Biosphère lles et Mer d'Iroise and Réserve de Biosphère Marais Audomarois) and two resource partners, Pas-de-Calais Tourisme and the University of Exeter. The collaborative project started in April 2018 and ends in December 2021. The project seeks to address the impacts of over-tourism in the Biosphere Reserve by using the concept of BioCultural Heritage Tourism (BCHT), which is about celebrating the connections between humans and the natural world around us. The project has three main themes: tourism management, business engagement and the development of new tourism experiences. This survey was part of the tourism management theme.

#### Purpose

This document presents the survey instrument used in a survey of tourists to Northern Devon disrupted via an online panel and information on the methods used for data collection. For enquiries about the aggregated results of the survey please contact the author.

#### Survey aims

The overall aim of the survey was to capture responses from a representative sample of domestic tourists (overnight staying visitors) to Northern Devon in 2021, and to explore their holiday experiences and preferences for the future of tourism in Northern Devon. Building on scenarios developed in the Bio-Cultural Heritage Tourism project and preferences stated in North Devon UNESCO Biosphere Reserve User Survey 2021, and Northern Devon Tourism Business Survey 2021, this survey sought to understand more about tourist preferences and attitudes toward tourism in the region. Given Covid-travel restrictions and stay-cation effect in 2021, a focus on domestic tourists (UK residents) was taken.

### Survey design

The survey was designed by the University of Exeter. It aimed to complement and extend the North Devon User Surveys 2019 and 2021 (also completed on the Bio-Cultural Heritage Tourism project), by exploring tourists attitudes towards the region and preferences for its future. Where the user surveys had captured information about on-site experiences, this survey explored tourist attitudes towards, and preferences for, nature, heritage and tourism in the region in more depth.

Where the user survey was completed on-site in Northern Devon, the panel survey aimed to gain responses from a representative sample of tourists from the UK. To achieve this, the sample was structured by quotas for six target groups. These quotas aimed to capture responses from respondents across a range of criteria (age, gender, ethnicity and socio-economic groups) based on a profile of the UK population. The online survey provided scope to collect nuanced attitudinal data using longer scales than are practical in in-person surveys.

The study was reviewed by Social Sciences and International Studies Research Ethics Committee (reference: 201819-043).

# Survey delivery

The survey was designed by the University of Exeter completed by an online survey panel provided by Smart Survey Ltd. University of Exeter designed the survey instrument which was shared with members of the panel via Smart Surveys GDPR-compliant survey platform. The survey was launched on 11th January and closed on 16th January 2022. We received 505 completed surveys from qualifying respondents, and 1081 responses from those who were disqualified.

To identify respondents who had been on holiday to Northern Devon in the last twelve month (i.e. in 2021) the survey started by showing participants two maps of the North Devon Biosphere Reserve. Participants were shown two maps, one of the Biosphere Reserve in its South West context and the other was of the Biosphere boundary. Participants were then asked whether they had had a holiday in the area in the last twelve months. Participants qualified to take part if they answered that they had had a holiday in the region in last twelve months, other participants were disqualified and did not complete the survey. Qualifying participants were then asked whether they wished to participate in the survey based on a summary of the research and information sheet. Those who consented were routed through to the remaining survey questions.

The survey referred to study area as 'Northern Devon' rather than the North Devon UNESCO Biosphere Reserve. We took this decision based on our view about the awareness of the Biosphere Reserve designation among visitors. This was based on findings from our 2019 and 2021 User Survey that awareness of the Biosphere Reserve status – and therefore likely awareness of the Biosphere Reserve boundary – is relatively low among tourists. We felt that dis/qualifying visitors based on their awareness of visiting the Biosphere Reserve would limit response rates. We acknowledge that strictly, Northern Devon comprises North Devon and Torridge districts of Devon, however the North Devon Biosphere Reserve boundary goes beyond these into Mid- and West Devon districts. Our use of 'Northern Devon' as the name of the area, was designed to cover a broad, Biosphere Reserve area, so that results could inform regional tourism management.

## Data cleaning

Although 505 respondents completed the survey, eight responses were disqualified by the researcher during data processing. Reasons for disqualification included respondents reporting zero holidays to Northern Devon in the last twelve months having completed the dis/qualification question reporting they had holidayed there in the last 12 months, and long strings on 'random' text in free text boxes (e.g. 'frHr gwgW GGKB'. The later was taken as an indicator of poor quality answers. The total useable responses to the survey was 497.

#### Data Analysis

Descriptive statistics were performed on SPSS (Version 28.0.1.0 [142]) by University of Exeter.

## Survey instrument

The survey contained 31 questions, including one dis/qualification question, and two consent questions.

Questions were organised into 9 themes:

- Information about the holiday in the last 12 months
- Reasons for visiting
- Holiday experiences and activities
- Sustainability and tourism impacts
- Perceptions of the future of tourism
- What's important now and in the future, in Northern Devon
- Future visits to Northern Devon
- Your holidays in 2022
- Demographic information

The questions are reproduced in full on the following pages (see pages 5-9)

# Survey questions

## Landing page

Earlang page
We're interested in your views to help us better understand tourism in Northern Devon. If you've
been on holiday in Northern Devon in the past 12 months, we're interested why you visited, your experience and activities while you were there and what you think tourism in Northern Devon might be like in the future. Please see these maps of Northern Devon, which define the area we are interested in:
MAP 1 image MAP 2 image

#### Map images

1. In the last 12 months, have you been on holiday in Northern Devon? The area is defined on the maps above.  $^{\star}$ 

Yes, I've been holiday in Northern Devon in the last 12 months
No, I haven't been on holiday in Northern Devon in the last 12 months

# Information about the survey and consent

The survey should take about 15 minutes to complete. Your participation is voluntary; you are free to stop completing the survey at any point. Your responses to the survey are completely anonymous. For more details of how we will protect and use the data you supply, please see our <a href="Information">Information</a> <a href="Sheet">Sheet</a>.

Our research is funded by the EU Interreg France Channel England programme. The results will enable the North Devon Biosphere Reserve in the local management of tourism. Anonymised results from the survey may be used in academic publications or conferences. For more details on the survey and this research, please see our <u>Information Sheet</u>.

Please note that once you submit the survey, you will be unable to withdraw your responses but they will be anonymous. The research is being conducted by the Centre for Rural Policy Research at the University of Exeter. If you are not happy with any aspect of the project and wish to communicate this, please contact the University of Exeter, College of Social Sciences and International Studies Research Ethics Committee, ssis-ethics@exeter.ac.uk.

2. Ple *	ase read the statements below. Check both boxes if you consent to participate in the research.
	I confirm that I have read the information sheet (version 2, 03.11.2021); understand that the data collected will be looked at by researchers at the University of Exeter; that anonymised, aggregated results will be shared with the North Devon Biosphere Reserve and tourism business organisations; and that data may be used in academic publications or conferences. I understand that while completing the survey I can stop at any time but that, after I submit the survey, I will be unable to withdraw my data. The University of Exeter will be unable to identify individual responses as they are anonymous.

# 3. Your holiday in Northern Devon in the last 12 months

This survey is about Northern Devon. Broadly, this is the districts of North Devon and Torridge in the county of Devon, in the South West of England. This area is also known as the North Devon Biosphere Reserve. We refer to this area as 'Northern Devon', 'the area' or 'the region' in the rest of the survey.

3. How many times have you been on holiday in Northern Devon in the last 12 months? Please ente a number in the box below. $^{\star}$
4. In the last 12 months, how long was your longest holiday in Northern Devon? Please let us know the number nights you stayed in the area. $^{\star}$
5. Was your holiday in the last 12 months *
Your first visit to the area
I've visited occasionally in the last 5 years (2 to 4 times)
I've visited regularly in the last 5 years (5 or more times)
6. During your longest holiday to Northern Devon in the last 12 months, who were you with? Please select all that apply. $^{\star}$
Partner/ spouse
Child/ children
Adult family members, or relatives
Friends
An organised group
I was on my own
7. How many people were in your group in total? Please include children and yourself in your answer. *
8. During your longest holiday to Northern Devon in the last 12 months, what was the main type of accommodation you used? $^{\star}$
Serviced (hotel, B&B, guest house)
Self-catering (cottage, apartment, hostel)
Accommodation-sharing via website (e.g. 'AirBnB')

Caravan / camper	van										
Camping											
Staying with friends / relatives											
Other (please specify):											
4. Reasons for	visiting										
9. Why did you choose	to visit Northern De	evon rather than el	sewhere?								
	Disagree		Agree								
We come to Northern Devon every year											
We have a holiday in th	e										
South West every year chose Northern Devon											
time											
We weren't able to travabroad due to Covid tra											
restrictions so we chose	e										
Northern Devon instead Northern Devon was or											
our 'bucket list' to visit											
10. We go on holiday to	Northern Devon										
	Strongly disagree	Disagree	Agree	Strongly agree							
To go walking											
To go cycling											
To do 'active' outdoor											
activities, such as surfing, coasteering etc											
To spend time on the											
beach To sample local food											
and drink											
To visit towns and villages											
To go shopping											
To go to events											
To go to visitor attractions											
11. We go on on holida	y to Northern Devo	n *									

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree					
To relax, for wellbeing										
To spend time with										
family and friends To enjoy the natural										
environment										
To learn about nature or heritage										
To explore the region										
To be active										
<ul> <li>5. Your holiday experience and activities</li> <li>12. Thinking of your longest holiday in Northern Devon in the last 12 months, please respond to the following statements about your experience of the area.</li> </ul>										
	Strongly disag	ree Disagree	Agree	S	Strongly agree					
What I enjoyed most about the area was its				ſ						
beaches and coastline				· ·						
I found some beaches				ſ						
and parts of the coast too busy				l						
Visiting inland parts of										
Northern Devon was a memorable part of the				(						
holiday										
Inland areas I visited were quiet and				ſ						
peaceful					_					
There was enough to do in Northern Devon					_					
when the weather was				l						
bad										
13. Thinking of your longest holiday in Northern Devon in the last 12 months, please respond to the following statements about your experience of facilities and travel in the region:										
	Strongly disag	ree Disagree	Agree	5	Strongly agree					
Parking was always				(						
available The roads in Northern	_	_	_							
Devon are too				(						
congested										
Bus and train transport options met my needs				[						
I needed a car to get the most out of my				(						

holiday in Northern Devon	Strongly dis	sagree	Disagree		Agree		Strongly agree	
Walking routes and cycling trails enhanced my visit								
14. When visiting natur these statements descr	_	e sites v	vhile o	on holiday in	Northern Dev	on, to	what	extent do
	Does not do	escribe		cribes me erately well	Describes r	me	Desc perfe	ribes me ctly
I like to visit nature/ heritage sites that have a café								
I prefer to follow a marked trail than use a map								
Information or interpretation at the site enhances my experience								
I check the site has appropriate toilet facilities before visiting								
I like to visit lesser known places that aren't too busy								
15. What was your exponer Northern Devon?	erience of th	ese thr	ee typ	es of nature	and heritage	sites, v	while c	on holiday in
	Very negative	Negat	ive	Neither negative nor positive	Positive	Very positi	ve	I didn't visit a site like this
'Secret spots': Places with footpaths, an informal car park or layby, but no facilities like toilets								
'Hidden gems': Sites with basic facilities such as bins, a map or some information about the site, a car park, but no staff or café								
'Beauty spots': Sites with facilities such as a toilet and a cafe, some interpretation and a large car park								

	Very negative	Negativ				Very positive	I didn't visit a site like this
'Major attractions': Sites with a visitor centre, a café, staff, toilet facilities							
If you wish to make ar here:	ny comment	s about yo	ur experiei	nce at nati	ure or heri	tage sites, pl	ease do so
6. Sustainabil	ity and	tourisi	m impa	acts			
16. How would you ra	te your com	mitment t	o acting su	stainably?	*		
	1 = Not at all committed	2	3	4	5	6	7 = Extremely committed
While at home, not on holiday							
While on holiday in Northern Devon							
While on holiday abroad							
17. Please respond to	following st	atements.	While on h	oliday in I	Northern D	Devon, I feel	. *
	Strongly disagree	Disagree	Somewha disagree	Neither agree no disagree	Somew agree	<sup>rhat</sup> Agree	Strongly agree
I had a positive impact on the natural environment							
I had a positive impact on the local economy							
I had a positive impact on the local community or culture							

# 7. Perceptions of the future of tourism in Northern Devon

18. We're interested in the future of tourism in Northern Devon, and we're interested in what visitors think of the options.

scenarios in order of preference. 1 = most favoured option, 3 = least favoured option. *											
Scenario 'U' – much the same as in the past; seasonal tourism concentrated in the summer and at particular, popular sites. The same sort of products and offer for tourists; no real change.											
Scenario 'G' – growing tourism significantly; removing restrictions to development, including on natural sites; allowing more attractions to open up, adding new products and offers for tourists.											
Scenario 'R' – managed change; modest development of tourism. Reducing tourism pressures in peak periods and at key environmental sites; spreading the benefits of tourism more widely throughout the year, across the area, and through local communities. Some new products and offers for tourists.											
19. In your opinion, w	hich scenar	rio do you t	hink is most	t likely to be	ecome a rea	ality? *					
<ul> <li>19. In your opinion, which scenario do you think is most likely to become a reality? *</li> <li>Scenario 'U' – much the same as in the past; seasonal tourism concentrated in the summer and at particular, popular sites. The same sort of products and offer for tourists; no real change.</li> <li>Scenario 'G' – growing tourism significantly; removing restrictions to development, including on natural sites; allowing more attractions to open up, adding new products and offers for tourists.</li> <li>Scenario 'R' – managed change; modest development of tourism. Reducing tourism pressures in peak periods and at key environmental sites; spreading the benefits of tourism more widely throughout the year, across the area, and through local communities. Some new products and offers for tourists.</li> <li>What's important now and for the future in Northern</li> <li>Devon</li> <li>20. Please respond to the statements below *</li> </ul>											
	Strongly disagree	Disagree	Somewha disagree	Neither agree nor disagree	Somewha agree	<sup>t</sup> Agree	Strongly agree				
There are too many visitors in Northern Devon already Tourism in Northern											
Devon shouldn't grow any further than it already has Northern Devon											
doesn't have the road infrastructure to support more visitors in peak season											
Farmers and landowners should be paid for looking after											

Below we describe several scenarios for the future of tourism in Northern Devon. Please rank the

	Strongly disagree	Disagree	Somewha disagree	Neither agree nor disagree	Somewhat agree	t Agree	Strongly agree
the region's natural environment Wildlife and environmental organisations are responsible for looking after the region's natural environment							
21. Please respond to	the statem	ents below	*				
	Strongly disagree	Disagree	Somewha disagree	Neither tagree nor disagree	Somewhat agree	t Agree	Strongly agree
It won't change Northern Devon if there are more visitors							
There should be more accommodation and facilities for visitors on the coast							
Northern Devon needs more visitor attractions to make me stay longer in the area							
Visitors should make a voluntary cash contribution to maintaining the natural environment							
Tourism businesses aren't responsible for the area's natural environment							
22. Please respond to	the statem	ents below	*				
	Strongly disagree	Disagree	Somewha disagree	Neither agree nor disagree	Somewhat agree	t Agree	Strongly agree
The benefits and impacts of tourism should be spread across the region, not focussed on the coast							

	Strongly disagree	Disagree	Somewha disagree	Neither agree nor disagree	Somewha agree	<sup>t</sup> Agree	Strongly agree
Tourism development should benefit local communities							
I'd come to Northern Devon outside of peak holiday season it there was more to do Tourism businesses							
should contribute to a 'tourism tax' that is used to maintain and enhance the natural environment							
As a tourist, I have a duty to protect the environment in Northern Devon							
9. Your future 23. If you were to visit					d you be in	*	
,		O	•		,		
	1 = Not at						7 =
	1 = Not at all interested	2	3	4	5	6	7 = Extremely interested
Learning more about the region's natural environment	all		3	4	5	6	Extremely
the region's natural environment Using public transport, bikes, or having car free days	all		3	4	5	6	Extremely
the region's natural environment Using public transport, bikes, or having car free days Eating in cafes/restaurants that sell locally sourced	all interested		3	4	5	6	Extremely
the region's natural environment Using public transport, bikes, or having car free days Eating in cafes/restaurants that sell locally sourced food Visiting inland areas away from the coast	all interested		3	4	5	6	Extremely
the region's natural environment Using public transport, bikes, or having car free days Eating in cafes/restaurants that sell locally sourced food Visiting inland areas	all interested		3	4	5	6	Extremely
the region's natural environment Using public transport, bikes, or having car free days Eating in cafes/restaurants that sell locally sourced food Visiting inland areas away from the coast Using a mobile app with real time parking information to decide	all interested		3	4	5	6	Extremely

24. If you were to visit Northern Devon again, how willing would be you be to *											
	1 = Not at all willing	2	3	4	5	6	7 = Extremely willing				
Make a small financia	al										
contribution to a scheme that looks											
after the area											
Pay to hire a bike or											
electric bike											
Pay for a guided walk	(										
of a farm, smallholding,											
vineyard, brewery,											
distillery etc.											
Pay for a guided walk											
of a historic building, archaeological site,											
heritage site etc.											
Pay for a half-day											
workshop to learn a											
rural skill (e.g. tree planting, stonewall											
building etc.)											
Pay for a half-day											
workshop to learn											
more about plants and animals (e.g.											
plant identification,											
bee keeping etc.)											
Be considerate of											
local communities by taking rubbish and											
litter home											
10. Your holid	days in	2022									
25. How likely or unli in 2022? *	25. How likely or unlikely are you to go on holiday in Northern Devon, elsewhere in the UK or abroacin 2022? *										
	Very unl	ikelv	Unlikely	1	ikely	Verv	likely				
Northern Devon				<u>-</u>		Oly					
					_						
Elsewhere in the UK				L	_						
Abroad, outside the l	JK 🔲			L							
26. How interested a	re you in tal	king a holi	day in Nort	hern Devo	n during th	ese times of	the year?				
1 = Not at all interest	ed; 7 = Extr	emely inte	erested								

Summer (June to August)
Autumn (September to November)
Winter (December to February)
Spring (March to May)
11. Demographics
27. Please select your age category: *
18 - 24 years
25 - 34 years
35 - 44 years
45 - 54 years
55 - 64 years
65+ years
Prefer not to say
28. How do you describe your gender? *
Female
Male
Prefer to self-describe (please give details below)
Prefer not to say
Prefer to self describe
29. Which category best describes you? *
In full-time employment (30+ hours per week)
In part-time employment (up to 30 hours per week)
Self employed
Student
Unemployed
Retired/Pensioner
Housewife/husband
Prefer not to say

30. How much does your household earn per year in total? *
Less than £11,908
£11,908 to £16,015
£16,016 to £20,019
£20,020 to £24,387
£24,388 to £29,223
£29,224 to £34,683
£34,684 to £41,339
£41,340 to £51,063
£51,064 to £65,883
£65,884 or more
Prefer not to say
31. Which of the categories below best describes your ethnic group or background?
We are collecting this information to help us understand if we are getting representation from different groups to this survey.
There is an option to not disclose this information. *
White
English/ Welsh/ Scottish/ Northern Irish/ British
Irish
Gypsy or Irish Traveller
Any other White background
Mixed / Multiple ethnic groups
White and Black Caribbean
White and Black African
White and Asian
Any other Mixed / multiple background
Asian or Asian British
Indian
Pakistani
Bangladeshi

Chinese
Any other Asian background
Black / African / Caribbean / Black British  African  Caribbean  Any other Black background
Other Ethnic Group  Arab  Any other ethnic group
Prefer Not To Say  I'd prefer not to disclose my ethnic group or background
Prefer To Describe  If you prefer to describe your ethnic group or background, please use this space
32. Please enter your postcode but exclude the last two letters. For example, for the University of Exeter the full postcode is EX4 4RN, so you would enter EX4 4. If your postcode was EX33 2BR, you would enter EX33 2.

If you live abroad please write the country you are from. So if you live in Paris, please write 'France'.

We are collecting this information to assess travel patterns only.