

# Exmouth 'Placemaking' Visitor Survey 2022

## Draft report

Produced for the Exmouth Queen's Drive Delivery Group  
(East Devon District Council)

By  
The South West Research Company Ltd.

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# Exmouth 'Placemaking' Visitor Survey 2022

## Key Findings & Conclusions



# Key findings

## Background

- The seafront area of Exmouth has undergone considerably redevelopment since 2018 in a bid to widen the appeal of the town to both residents and visitors alike and increase leisure spend to further support the local economy. Part of the redevelopment has included the Queen's Drive area and whilst plans for this area continue to be developed a number of temporary usage activities and events have been provided there since the summer of 2018. As determined at the Delivery Group Meeting on the 8<sup>th</sup> of March, Members agreed to hold a workshop-style meeting on the evening of 6<sup>th</sup> April 2022, for Delivery Group Members only to meet in person with a view to obtaining consensus on a strategic definition for what Placemaking in Exmouth would look like including possible themes and characteristics. The next steps are now to seek approval to proceed with the placemaking themes and characteristics identified through a series of workshops and a public consultation to present the workshop's findings to interest groups, stakeholders and the public and to seek their feedback.
- As part of this consultation process the Exmouth Queen's Drive Delivery Group at EDDC appointed The South West Research Company Ltd. to conduct a face to face survey amongst visitors to Exmouth during the summer of 2022 to show them how they are thinking of developing placemaking in the town including details of the proposed themes and characteristics identified at the Delivery Group Meeting to explore what visitors think of these plans and what, if any, gaps they think there are in them. The survey explored to what extent visitors agreed with the proposed themes and characteristics for placemaking in the town, what they felt about them and what, if anything, they thought was missing. The data collected via this visitor survey will be collated along with the workshops and public consultation information and presented to the Delivery Group so that a final set of Themes and Characteristics can be agreed and a recommendation made to Cabinet as to the way forward.
- This report has been produced by The South West Research Company (TSWRC) on behalf of East Devon District Council (EDDC) and contains the key findings for the visitor survey based on a sample of 400 face to face interviews conducted in the months of July and August 2022. The face to face survey was conducted by a team of experienced interviewers in five key interview zones across the resort commencing on Saturday 16<sup>th</sup> July 2022 and continuing through until Saturday 27<sup>th</sup> August 2022. Adults (aged 16+ years) were sampled on a random basis as they visited the resort in accordance with the Market Research Society (MRS) guidelines for face to face interviewing and 400 is a statistically robust sample to provide an overview of visitors during this period and was specifically calculated for this project.

# Key findings

## Respondent profile

- 36% of survey respondents were staying overnight in accommodation in Exmouth whilst 64% were visiting the resort for the day either whilst on holiday staying outside the resort (30%) or on a day trip from home (34%).
- A third of respondents were visiting Exmouth in an immediate family group (husband/wife/partner/children) and 30% as part of a couple (husband/wife/partner). 16% were visiting the resort as part of an extended family group (grandparents/other relatives).
- Around a third of respondents in each case fell into the 65+ age group, the 45-54 years age group and the 44 years or under age group.
- 51% of respondents lived in the SW region including approximately 26% in postcode area EX (Exeter). 48% of respondents were from elsewhere in the UK including approximately 5% from the Birmingham postal area code.
- For half of all respondents visiting Exmouth the chief income earner in their household was in full-time, 30+ hours per week, employment whilst for 32% they were retired with a company/private pension.
- Socio economic groups AB and C1 accounted for 64% of all respondents.
- 76% of respondents were on a repeat visit to the town.
- 80% of repeat visitors had last visited the resort during 2020 or later whilst 20% had done so prior to the Covid-19 pandemic during 2019 or earlier.

## Development options

- In the first instance, respondents were told that East Devon District Council are considering a number of development options for Exmouth and that a number of suggestions had been put forward for consideration. Respondents were then asked to rate to what extent they agreed or disagreed with each of the development options on a scale of 'Strongly agree' to 'Strongly disagree' allowing an average agreement score out of a maximum of 5.00 to be calculated. The higher the average score calculated, the higher the level of agreement with the development suggestion.
- Agreement levels were highest for *"Developments should provide income and jobs for a variety of different business types, not just one type"* (4.22) and *"Improvements to the unoccupied and derelict areas of Exmouth"* (4.20).
- Respondents were asked if they had any comments to make about any of the development options proposals. 25% of those respondents providing a comment said the town had already improved a lot and it was all good/no changes were needed whilst 14% said they didn't know/had only just arrived in the town or not been here long enough to comment. In addition, improvements to parking, transport links and signage were some of the areas of most concern amongst those respondents providing a comment.

# Key findings

## Development options continued

- Respondents were also asked about any other proposals or ideas that they thought would improve Exmouth but which weren't on the development options list already and 19% of those respondents providing a suggestion said the town was all good/had already changed a lot and that no changes were needed whilst 4% said they didn't know/didn't know the area well enough to comment. In addition, parking, along with improvements to public toilets and the cleaning/tidying up the town centre were some of the areas of most concern amongst respondents providing a suggestion.
- The top and bottom five development options are summarized in the table below.

Top 5 Development options	Agreement score (max. of 5.00)	Rank
Developments should provide income and jobs for a variety of different business types, not just one type	4.22	1
Improvements to the unoccupied and derelict areas of Exmouth	4.20	2
Improved activities for young people aged 11 to 18	3.86	3
A development to encourage and support marine based businesses	3.82	4
Improved management of the natural environment.	3.74	5
Bottom 5 Development options	Agreement score (max. of 5.00)	Rank
An improved mixture of free and paid for activities	3.39	14
Improved signage for pedestrians	3.39	15
Improved sports and leisure facilities	3.37	16
Improved walking and cycling links to Exeter	3.33	17
Improved links between the different areas of Exmouth e.g. between the beach and the town centre	3.32	18

# Key findings

## Development themes

- Secondly, respondents were told that when any developments take place the town also needs to consider the themes that the developments may need for example: how they appear to people, what they provide, who they are for and how they portray the town. Respondents were then asked to rate to what extent they agreed or disagreed with each of the development themes on a scale of 'Strongly agree' to 'Strongly disagree' allowing an average agreement score out of a maximum of 5.00 to be calculated. The higher the average score calculated, the higher the level of agreement with the development theme.
- Agreement levels were highest for *"Being accessible to everyone"* (4.60) and *"Offering something for everyone to enjoy"* (4.59).
- Respondents who agreed with the idea of having a unique selling point or something iconic in the town were asked if they had any ideas as to what that could be. 21% of those respondents providing a comment said the town already had a USP with the Jurassic Coast/beach/sea/estuary/harbour whilst 4% said they didn't know.
- The main suggestions for a USP focused around Exmouth's history/heritage, a maritime/naval theme and making more of the Jurassic Coast and waterfront.
- Respondents were asked if they had any comments to make about any of the proposed themes for developments. 41% of those respondents providing a comment said that Exmouth was all good/beautiful as it was/didn't need a development theme, 16% that it has already got a theme in the beach/sea/coastline etc. whilst 6% said they didn't know the town well enough to comment. Some respondents who commented were concerned that any proposed development themes were natural/not too thematic and in keeping with the resort whilst some mentioned it having a maritime focus.
- Finally, respondents were also asked about any other themes for developments that they thought would improve Exmouth but which weren't on the development themes list already. 21% of those respondents providing a suggestion said that no changes were needed/lots of changes had happened already/keep it as a traditional seaside town whilst 10% said they didn't know/asked whether there had to be a theme at all?
- Suggestions included improving the range of things to see and do, beach/sports activities, sailing/water sports activities and focusing on nature/wildlife.
- The top and bottom five development themes are summarized in the table overleaf.

# Key findings

## Development themes continued

Top 5 Development themes	Agreement score (max. of 5.00)	Rank
Being accessible to everyone	4.60	1
Offering something for everyone to enjoy	4.59	2
Consider and be themed around the natural environment	4.33	3
Being a safe place	4.28	4
Being open all year round	4.26	5
Bottom 5 Development themes	Agreement score (max. of 5.00)	Rank
Being a town that takes action to reduce climate change	4.14	8
Having a clear identity and purpose	4.09	9
Having a traditional seaside theme	4.07	10
Having a Jurassic Coast theme	3.70	11
Having a unique selling point or something iconic	3.51	12



# Conclusions

- What is clear from the survey findings for both the development options and themes presented to respondents is that there is no disagreement to any of the suggestions put forward, just varying levels of agreement with all of the options receiving positive agreement scores although with some options clearly standing out from others.
- In terms of the development options that were provided to respondents, the top two (1- Developments should provide income and jobs for a variety of different business types, not just one type and 2- Improvements to the unoccupied and derelict areas of Exmouth) achieved agreement scores significantly higher than any of the other options provided and are the stand out choices for visitors to the town.
- Below these developments options the next eight options, when ranked by the agreement score achieved, are all scored within of 0.25 of each other (scores ranging from 3.86 to 3.61). So whilst there is an order of preference calculated through this research, the closeness of the results below the first two options should also be considered.
- Below the top ten ranked development options the scores are lower again and whilst the scores are still good, in comparison to the other options provided these options can probably be marked as not important to visitors from the list of those provided.
- A broadly similar trend is apparent for the list of development themes provided to respondents with the top two (1- Being accessible to everyone and 2- Offering something for everyone to enjoy) displaying scores clearly above the other themes presented. Again, the stand out choices for visitors.
- Below the top two development themes the next eight options, when ranked by the agreement score achieved, are all scored within of 0.26 of each other (scores ranging from 4.33 to 4.07). So again, whilst there is an order of preference calculated through this research, the closeness of the results below the first two options should also be considered.
- In a similar manner to the development options, below the top ten ranked development themes the scores are lower again and whilst the scores are still good, in comparison to the other options provided these options can probably be marked as not important to visitors from the list of those provided.
- Whilst many different comments and suggestions were made by respondents about the suggested development options and themes for the resort, on the whole, the majority commented that they felt the town was good as it was and had already been developed a lot. Whilst considering visitor opinions as part of this process it should be noted that the driver for many visiting the town is that they like it as it is and new developments should be in keeping with the towns character if a good proportion of existing visitors are to be kept onboard.
- What is also clearly evident from the overall survey findings for a good proportion of respondents is that when given the opportunity to express their own opinions about development options and themes outside of the options that they were provided with it, is largely improvements to the basic existing facilities on offer in the resort which are coming out as priorities for many visitors rather than any further new developments for the resort.

# Exmouth 'Placemaking' Visitor Survey 2022

## Introduction



# Background & rationale

In 2015, Exmouth attracted approximately 421,000 staying visits from UK and overseas visitors combined with approximately 2.9 million day visits, generating an estimated £183 million pound's worth of visitor spend in the local economy. Approximately 3,000 full time equivalent jobs within the resort are tourism related. *(Source; Value of Tourism 2015 – South West Research Company Ltd.)*.

The oldest seaside town in Devon, Exmouth boasts two miles of sandy beach and is the gateway to the World Heritage Jurassic Coast. A popular holiday destination since the 18th century, Exmouth truly represents the British seaside at its best with golden beaches for building sandcastles, rock pools to hunt for elusive crabs and sparkling sea in which to paddle, swim, windsurf and water ski.

The seafront area of Exmouth has undergone considerably redevelopment since 2018 in a bid to widen the appeal of the town to both residents and visitors alike and increase leisure spend to further support the local economy. Part of the redevelopment has included the Queen's Drive area and whilst plans for this area continue to be developed a number of temporary usage activities and events have been provided there since the summer of 2018.

As determined at the Delivery Group Meeting on the 8<sup>th</sup> of March, Members agreed to hold a workshop-style meeting on the evening of 6<sup>th</sup> April 2022, for Delivery Group Members only to meet in person with a view to obtaining consensus on a strategic definition for what Placemaking in Exmouth would look like including possible themes and characteristics. The next steps are now to seek approval to proceed with the placemaking themes and characteristics identified through a series of workshops and a public consultation to present the workshop's findings to interest groups, stakeholders and the public and to seek their feedback.

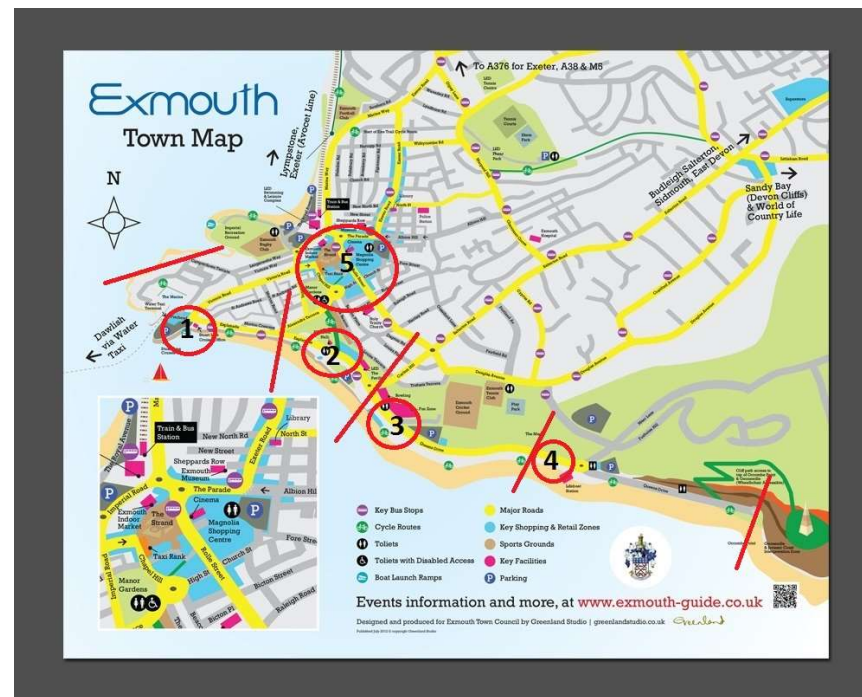
As part of this consultation process the Exmouth Queen's Drive Delivery Group at EDDC appointed The South West Research Company Ltd. to conduct a face to face survey amongst visitors to Exmouth during the summer of 2022 to show them how they are thinking of developing placemaking in the town including details of the proposed themes and characteristics identified at the Delivery Group Meeting to explore what visitors think of these plans and what, if any, gaps they think there are in them. The survey explored to what extent visitors agreed with the proposed themes and characteristics for placemaking in the town, what they felt about them and what, if anything, they thought was missing.

The data collected via this visitor survey will be collated along with the workshops and public consultation information and presented to the Delivery Group so that a final set of Themes and Characteristics can be agreed and a recommendation made to Cabinet as to the way forward.

# Methodology

400 face to face interviews were undertaken amongst visitors to Exmouth in five key interview zones across the resort (shown in the map below) commencing on Saturday 16<sup>th</sup> July 2022 and continuing through until Saturday 27<sup>th</sup> August 2022.

Adults (aged 16+ years) were sampled on a random basis as they visited the resort in accordance with the Market Research Society (MRS) guidelines for face to face interviewing and 400 is a statistically robust sample to provide an overview of visitors during this period and was specifically calculated for this project.



The sample points above were agreed in full consultation with EDDC and were the same as those used for previous visitor survey work conducted in the town. They were selected to cover the whole seafront area and the town centre and to ensure that all visitor types were fully represented by the survey and that they covered the main access routes/car parks etc. to different parts of the beach (all of which are slightly different in terms of facilities). They were

# Statistical reliability

All sample surveys are subject to statistical error. The size of this error varies with the sample size and also with the order of magnitude of the research findings being considered.

The table below shows the sample achieved and gives the margins within which one can be 95% certain that the true figures will fall (assuming the sample is random).

The figures shown are at the 95% confidence limits. Thus, for example, we can be 95% certain that, for all visitors with a result of 50%, the true percentage is the range 45.1% to 54.9%.

The margins of error shown below should be borne in mind when interpreting the results contained in this report.

Combined survey response	All Visitors
Research findings	<b>Sample: 400</b>
10% or 90%	+/- 2.9
20% or 80%	+/- 3.9
30% or 70%	+/- 4.5
40% or 60%	+/- 4.8
50%	+/- 4.9

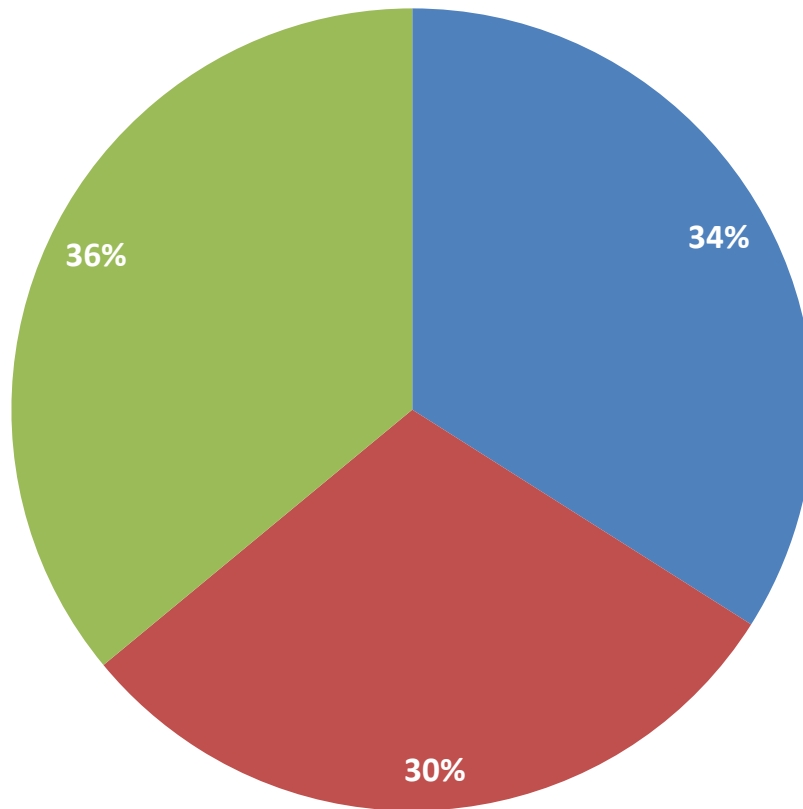
# Exmouth 'Placemaking' Visitor Survey 2022

## Visitor Profile



# 36% were staying overnight in Exmouth

Visitor type



- Day visitor from home
- Staying overnight outside of Exmouth
- Staying overnight in Exmouth

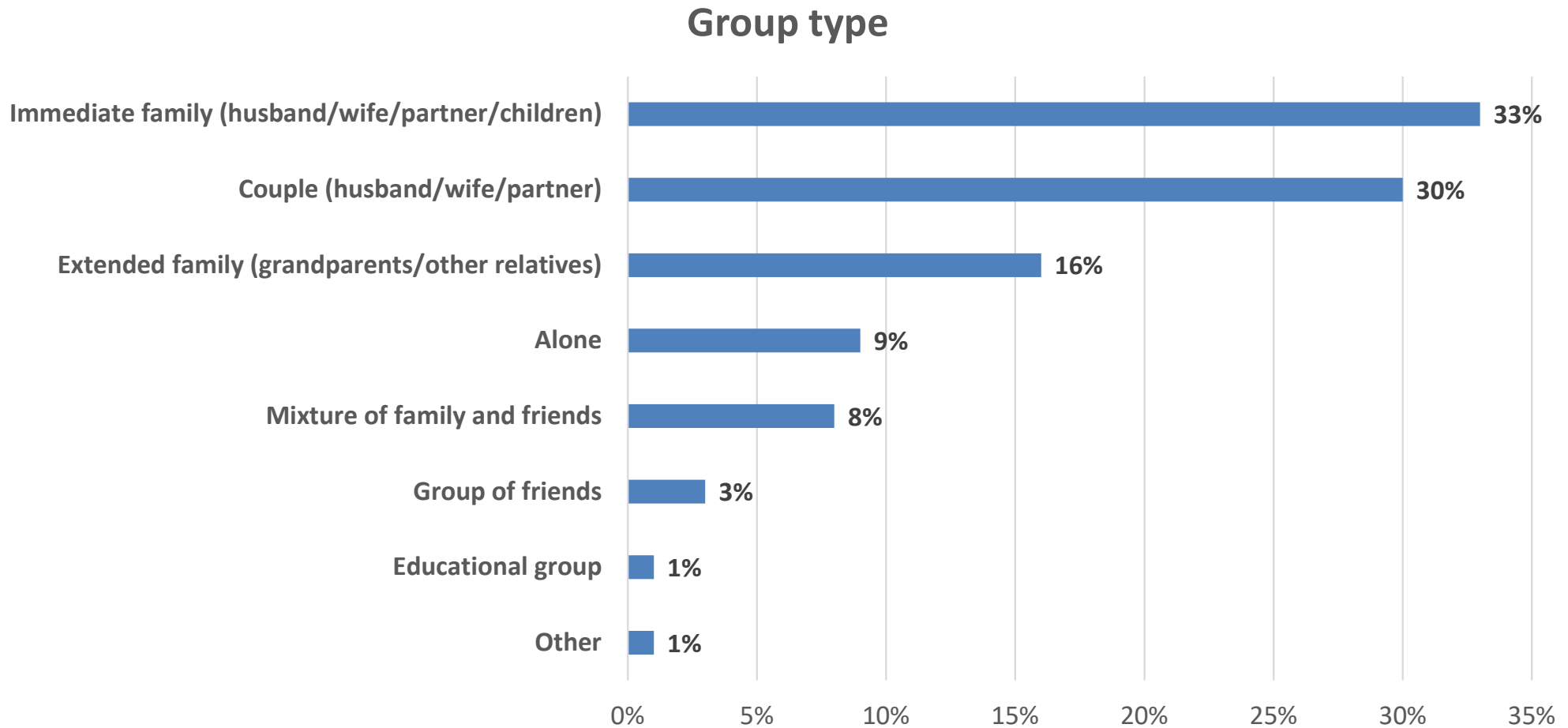
The largest proportion of survey respondents (36%) were staying overnight in accommodation in Exmouth. A similar proportion, 34%, were on a day trip from home on the day of their visit to the resort.

30% were on a day trip whilst staying overnight in accommodation outside of Exmouth.

# 33% were visiting in a family group

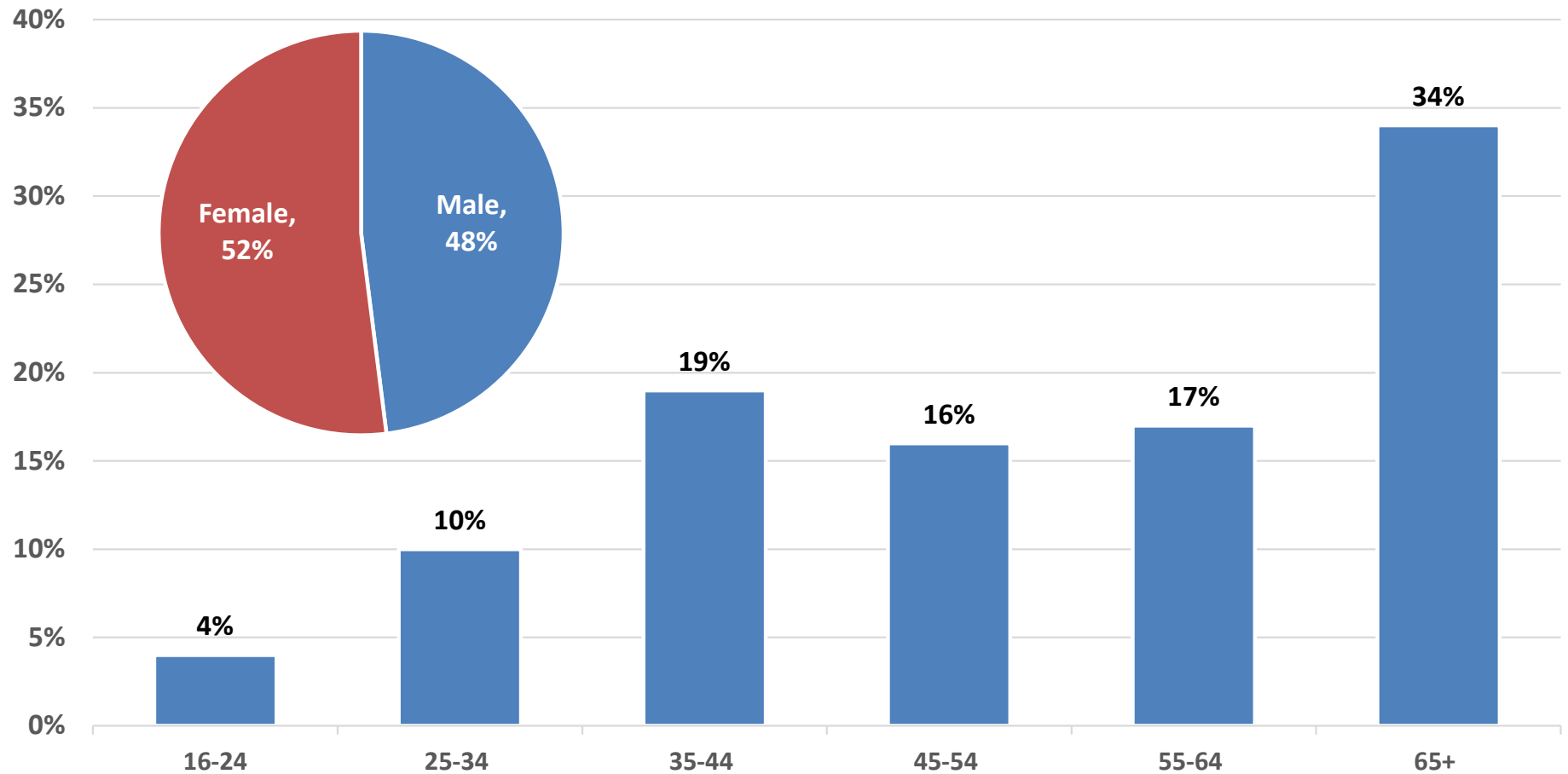
A third of respondents were visiting Exmouth in an immediate family group (husband/wife/partner/children) and 30% as part of a couple (husband/wife/partner). 16% were visiting the resort as part of an extended family group (grandparents/other relatives).

9% were visiting alone, 8% with a mixed group of family and friends and 3% in a group of friends. 1% in each case were visiting in an educational group or another type of group.





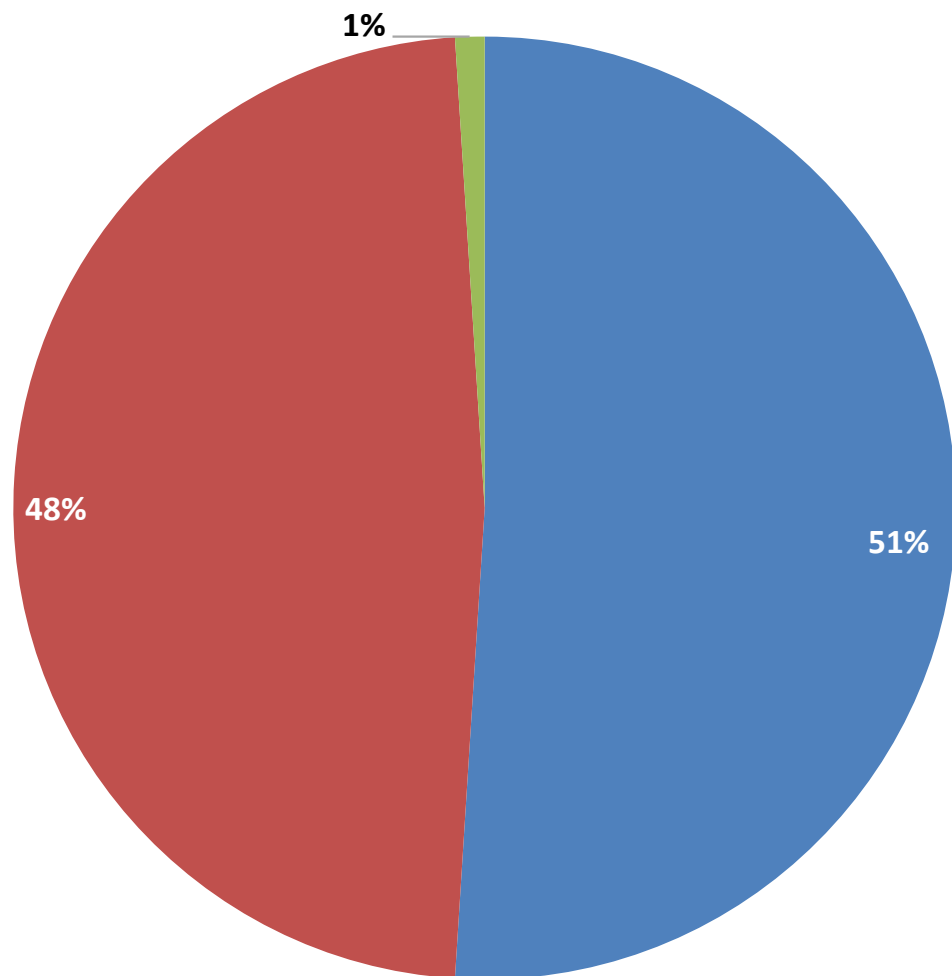
# Good spread of respondents across all age groups.



The survey attracted a good spread of interviewees across all age groups with around a third in each case falling into the 65+ age group, the 45-54 years age group (17% aged 55-64 years and 16% aged 45-54 years) and the 44 years or under age group (19% aged 35-44 years, 10% aged 25-34 years and 4% aged 16-24 years).

52% of all respondents were female and 48% were male.

# 51% lived within the South West region including approximately 26% with a EX (Exeter) postal area code



■ South West resident ■ Other UK resident ■ Overseas resident

Survey respondents were asked to provide their home postal code to analyse where they lived.

Around half (51%) lived within the South West region including approximately 26% with a EX (Exeter) postal area code, approximately 7% with a TA (Taunton) postal area code and approximately 6% with a BS (Bristol) postal area code.

48% of respondents were from elsewhere in the UK including approximately 5% from the Birmingham postal area code and approximately 2% in each case from the Coventry (CV) and Worcester (WR) postal area codes.

1% of all visitors were from overseas including Australia, Germany and Romania

A full list of respondents' postal area code origin are shown in the table overleaf.

# Ranked visitor origin by postal area

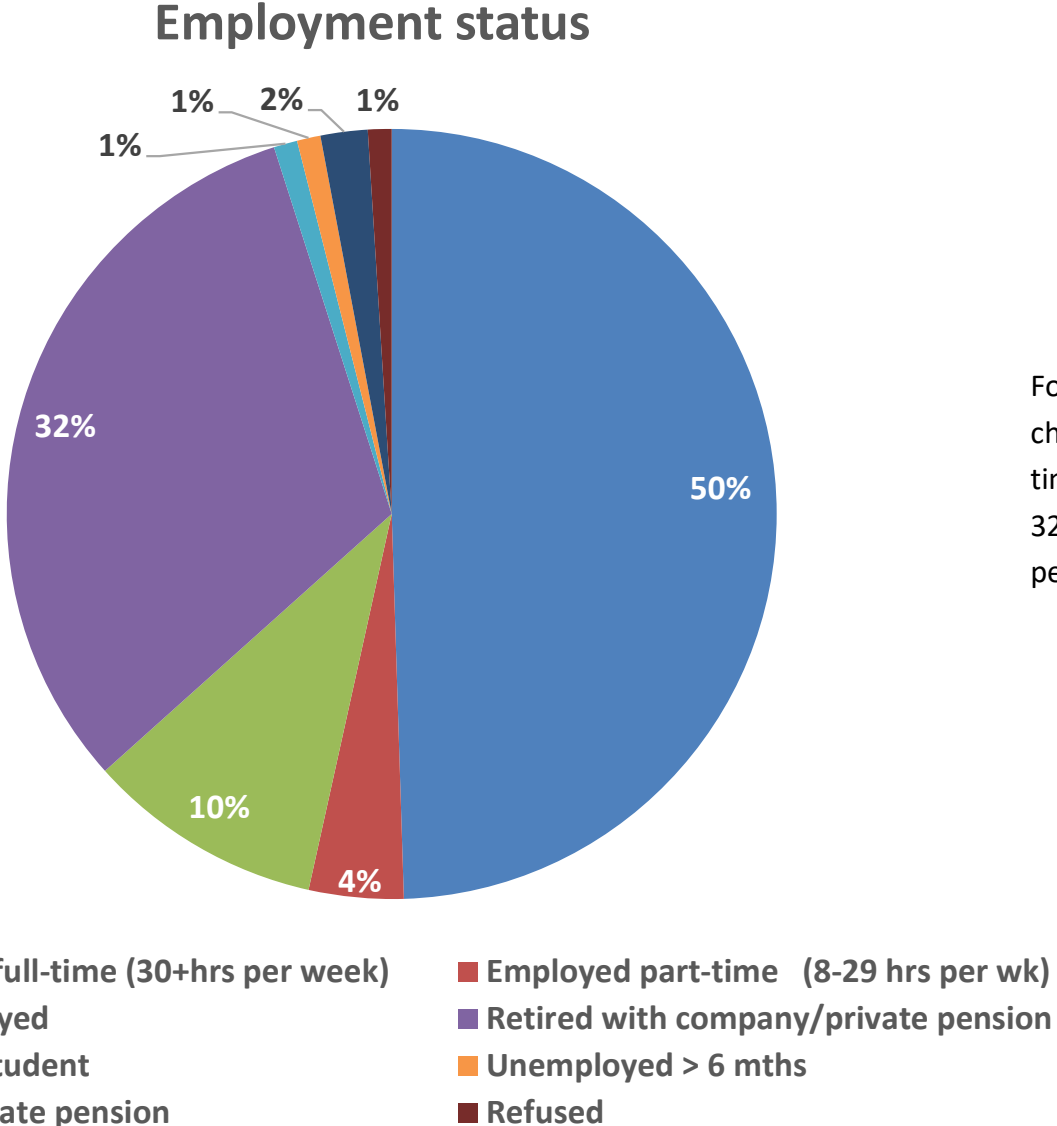
Visitor origin by postal code area – all visitors							
<b>Exeter</b>	26.32%	<b>Newport</b>	1.05%	<b>Luton</b>	0.53%	<b>Kingston Upon Thames</b>	0.26%
<b>Taunton</b>	6.84%	<b>Oxford</b>	1.05%	<b>Oldham</b>	0.53%	<b>Kirkcaldy</b>	0.26%
<b>Bristol</b>	5.79%	<b>Stevenage</b>	1.05%	<b>Paisley</b>	0.53%	<b>Liverpool</b>	0.26%
<b>Birmingham</b>	4.74%	<b>Stockport</b>	1.05%	<b>Southampton</b>	0.53%	<b>Lancaster</b>	0.26%
<b>Torquay</b>	3.42%	<b>Slough</b>	1.05%	<b>Salisbury</b>	0.53%	<b>Llandrindod Wells</b>	0.26%
<b>Gloucester</b>	2.89%	<b>Wolverhampton</b>	1.05%	<b>Tonbridge</b>	0.53%	<b>Leicester</b>	0.26%
<b>Coventry</b>	2.37%	<b>Ipswich</b>	0.79%	<b>Bournemouth</b>	0.26%	<b>Llandudno</b>	0.26%
<b>Worcester</b>	2.37%	<b>Leeds</b>	0.79%	<b>Cambridge</b>	0.26%	<b>Newcastle Upon Tyne</b>	0.26%
<b>Reading</b>	1.84%	<b>Medway</b>	0.79%	<b>Chester</b>	0.26%	<b>Preston</b>	0.26%
<b>Bath</b>	1.58%	<b>Northampton</b>	0.79%	<b>Chelmsford</b>	0.26%	<b>Redhill</b>	0.26%
<b>Derby</b>	1.58%	<b>Portsmouth</b>	0.79%	<b>Dumfries</b>	0.26%	<b>Southend-On-Sea</b>	0.26%
<b>Plymouth</b>	1.58%	<b>Sheffield</b>	0.79%	<b>Durham</b>	0.26%	<b>Telford</b>	0.26%
<b>Cardiff</b>	1.32%	<b>London SE</b>	0.79%	<b>Doncaster</b>	0.26%	<b>Twickenham</b>	0.26%
<b>Nottingham</b>	1.32%	<b>Stoke-On-Trent</b>	0.79%	<b>Edinburgh</b>	0.26%	<b>Southall</b>	0.26%
<b>Swindon</b>	1.32%	<b>London SW</b>	0.79%	<b>Enfield</b>	0.26%	<b>London W</b>	0.26%
<b>Walsall</b>	1.32%	<b>Shrewsbury</b>	0.79%	<b>Guildford</b>	0.26%	<b>Warrington</b>	0.26%
<b>Bromley</b>	1.05%	<b>St. Albans</b>	0.53%	<b>Harrow</b>	0.26%	<b>Watford</b>	0.26%
<b>Dudley</b>	1.05%	<b>Crewe</b>	0.53%	<b>Huddersfield</b>	0.26%	<b>Wakefield</b>	0.26%
<b>Manchester</b>	1.05%	<b>Dartford</b>	0.53%	<b>Hemel Hempstead</b>	0.26%	<b>Overseas</b>	1.32%
<b>Milton Keynes</b>	1.05%	<b>Glasgow</b>	0.53%	<b>Hereford</b>	0.26%		

# Visitor postcodes mapped

By analysing the respondents' home postcodes using specialist mapping software, it was possible to map their home origin. Key concentrations of visitors lived in Devon, along the M5 and M4 corridors, former Avon, Birmingham and outer London areas.



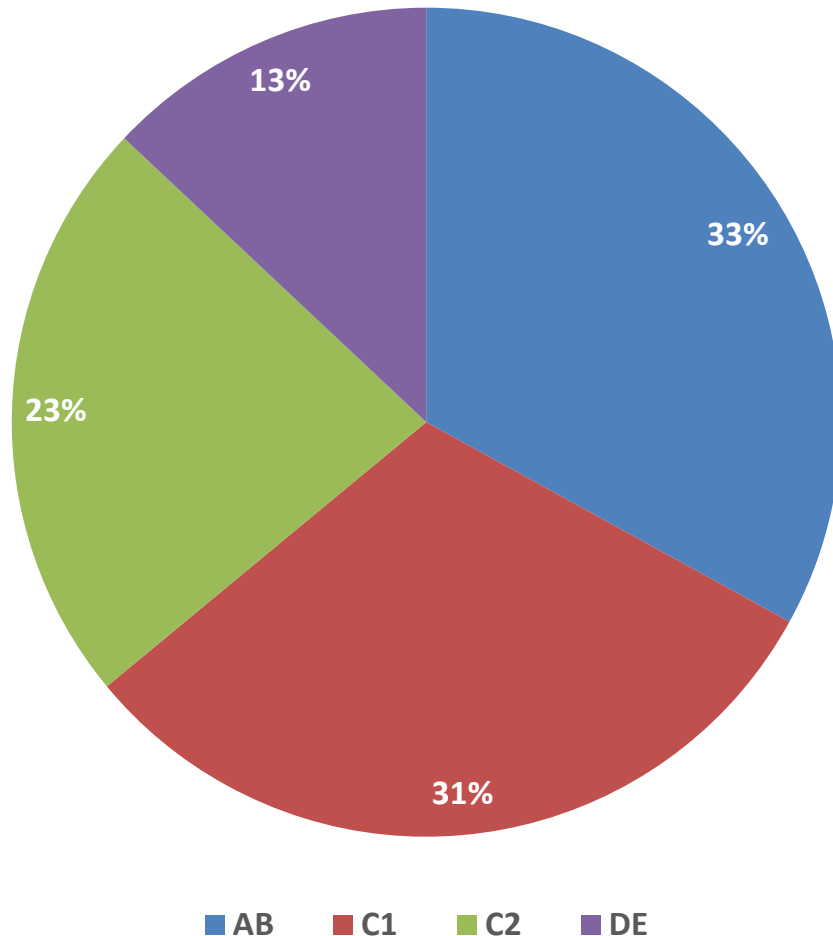
# For half of all respondents visiting Exmouth the chief income earner in their household was in full-time, 30+ hours per week, employment



For half of all respondents visiting Exmouth the chief income earner in their household was in full-time, 30+ hours per week, employment whilst for 32% they were retired with a company/private pension.

# 64% of all respondents were categorised as ABC1's

## Socio economic grade



### **A - Approximately 3% of the total population.**

These are professional people, very senior managers

### **B - Approximately 20% of the total population**

Middle management executives in large organisations, principal officers in local government, top management or owners of small business concerns.

### **C1 - Approximately 28% of the total population.**

Junior management, owners of small establishments, and all others in non-manual positions.

### **C2 - Approximately 21% of the total population.**

All skilled manual workers, and those manual workers with responsibility for other people.

### **D - Approximately 18% of the total population.**

All semi-skilled and un-skilled manual workers, apprentices and trainees to skilled workers.

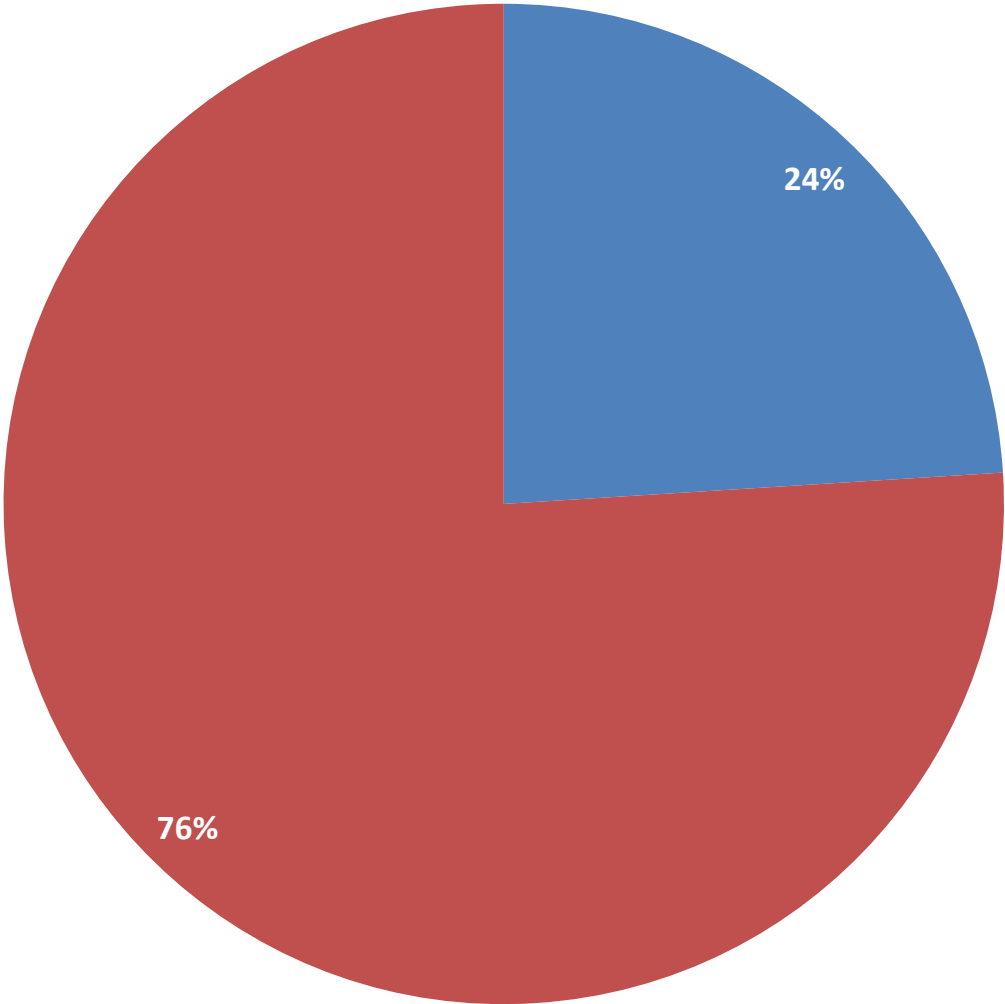
### **E - Approximately 10% of the total population.**

All those entirely dependent on the state long-term, through sickness, unemployment, old age or other reasons. Those unemployed for a period exceeding six months

64% of all respondents were categorised as ABC1's including 33% as AB's and 31% as C1's based on the occupation of the highest earner in their household. A further 23% of visitors were categorised as C2's and 13% as DE's.

# 76% of respondents were on a repeat visit to Exmouth

Whether first ever visit to Exmouth



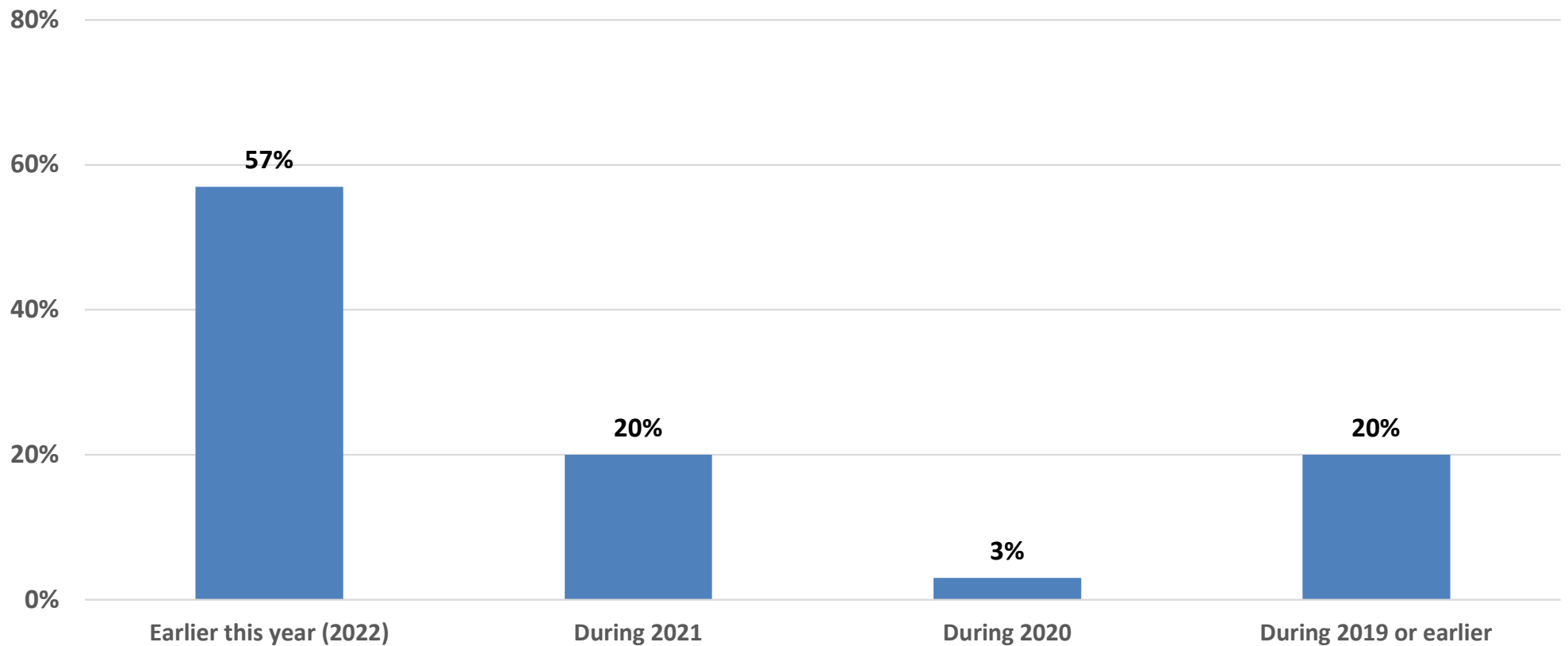
76% of respondents were on a repeat visit to Exmouth and 24% were visiting the resort for the first time at the point of interview.

■ Yes ■ No

# 80% of repeat visitors had last visited the resort during 2020 or later

80% of repeat visitors had last visited the resort during 2020 or later including 57% who had visited earlier in 2022, 20% during 2021 and 3% during 2020. 20% had last visited the resort prior to the Covid-19 pandemic during 2019 or earlier.

## When last visited Exmouth – Previous visitors





# Exmouth 'Placemaking' Visitor Survey 2022

## Development Options

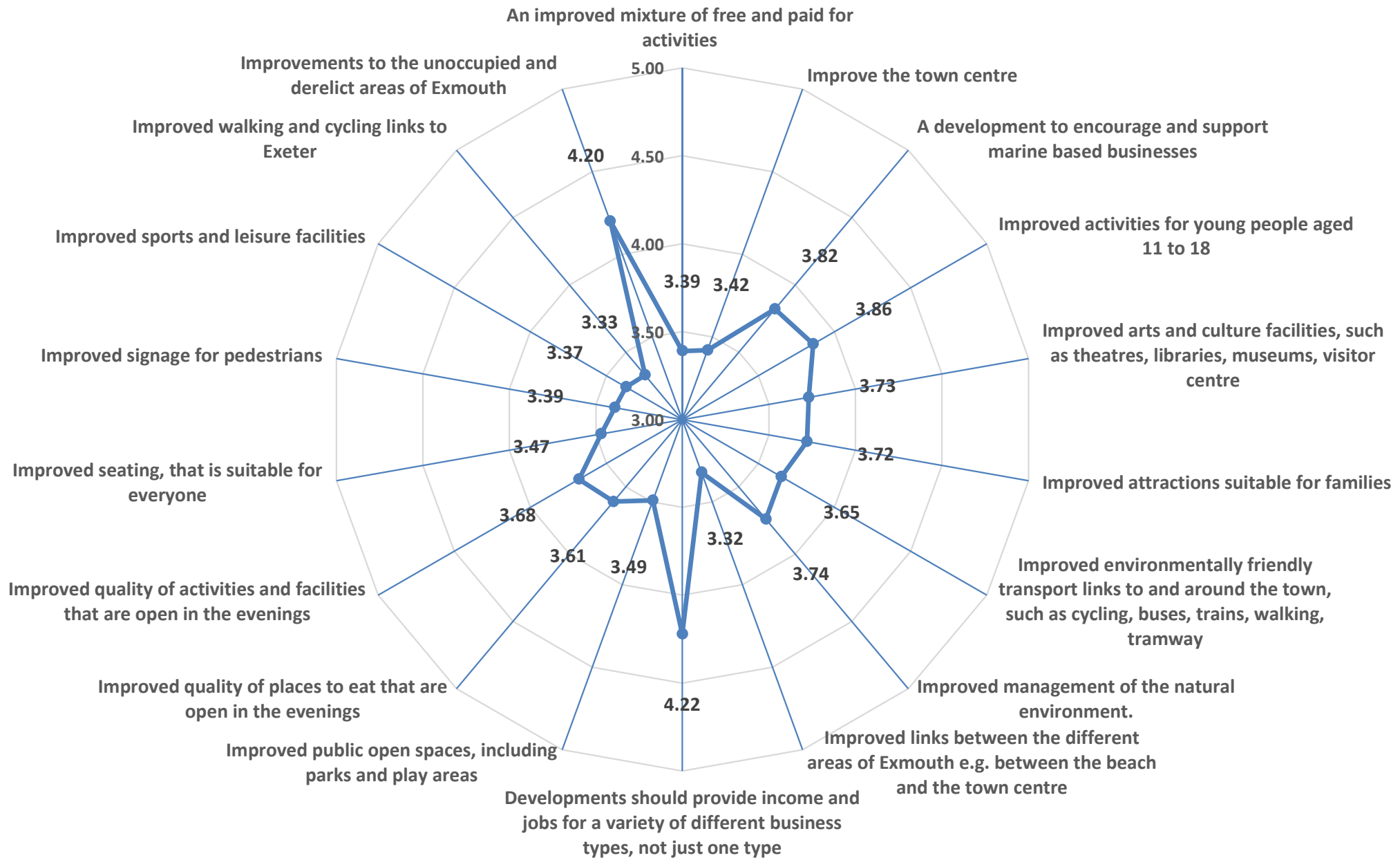


# Introduction – Development options

In the first instance, respondents were told that East Devon District Council are considering a number of development options for Exmouth and that a number of suggestions had been put forward for consideration. Respondents were then asked to rate to what extent they agreed or disagreed with each of the development options on a scale of 'Strongly agree' to 'Strongly disagree' allowing an average agreement score out of a maximum of 5.00 to be calculated. The higher the average score calculated, the higher the level of agreement with the development suggestion. The development options included the following:

- *An improved mixture of free and paid for activities*
- *Improve the town centre*
- *A development to encourage and support marine based businesses*
- *Improved activities for young people aged 11 to 18*
- *Improved arts and culture facilities, such as theatres, libraries, museums, visitor centre*
- *Improved attractions suitable for families*
- *Improved environmentally friendly transport links to and around the town, such as cycling, buses, trains, walking, tramway*
- *Improved management of the natural environment.*
- *Improved links between the different areas of Exmouth e.g. between the beach and the town centre*
- *Developments should provide income and jobs for a variety of different business types, not just one type*
- *Improved public open spaces, including parks and play areas*
- *Improved quality of places to eat that are open in the evenings*
- *Improved quality of activities and facilities that are open in the evenings*
- *Improved seating, that is suitable for everyone*
- *Improved signage for pedestrians*
- *Improved sports and leisure facilities*
- *Improved walking and cycling links to Exeter*
- *Improvements to the unoccupied and derelict areas of Exmouth*

# Development options agreement scores



## **Agreement levels were highest for: Developments should provide income and jobs for a variety of different business types, not just one type (4.22) and improvements to the unoccupied and derelict areas of Exmouth (4.20)**

Agreement levels were highest (3.65 or more out of max. of 5.00) with the following development options:

- Developments should provide income and jobs for a variety of different business types, not just one type (4.22)
- Improvements to the unoccupied and derelict areas of Exmouth (4.20)
- Improved activities for young people aged 11 to 18 (3.86)
- A development to encourage and support marine based businesses (3.82)
- Improved management of the natural environment (3.74)
- Improved arts and culture facilities, such as theatres, libraries, museums, visitor centre (3.73)
- Improved attractions suitable for families (3.72)
- Improved quality of activities and facilities that are open in the evenings (3.68)
- Improved environmentally friendly transport links to and around the town, such as cycling, buses, trains, walking, tramway (3.65)

They were lowest (3.61 or less out of a max. of 5.00) for the following development options:

- Improved links between the different areas of Exmouth e.g. between the beach and the town centre (3.32)
- Improved walking and cycling links to Exeter (3.33)
- Improved sports and leisure facilities (3.37)
- Improved signage for pedestrians (3.39)
- An improved mixture of free and paid for activities (3.39)
- Improve the town centre (3.42)
- Improved seating that is suitable for everyone (3.47)
- Improved public open spaces, including parks and play areas (3.49)
- Improved quality of places to eat that are open in the evenings (3.61).

# Development options agreement scores summary

Development options	Agreement score (max. of 5.00)	Rank	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Developments should provide income and jobs for a variety of different business types, not just one type	4.22	1	32%	55%	9%	1%	-	4%
Improvements to the unoccupied and derelict areas of Exmouth	4.20	2	29%	43%	8%	1%	1%	17%
Improved activities for young people aged 11 to 18	3.86	3	16%	40%	14%	6%	0%	24%
A development to encourage and support marine based businesses	3.82	4	11%	53%	17%	4%	0%	15%
Improved management of the natural environment.	3.74	5	17%	43%	20%	10%	0%	10%
Improved arts and culture facilities, such as theatres, libraries, museums, visitor centre	3.73	6	12%	47%	19%	8%	0%	15%
Improved attractions suitable for families	3.72	7	15%	48%	22%	9%	1%	7%
Improved quality of activities and facilities that are open in the evenings	3.68	8	9%	32%	13%	8%	-	38%
Improved environmentally friendly transport links to and around the town, such as cycling, buses, trains, walking, tramway	3.65	9	19%	38%	23%	14%	0%	6%
Improved quality of places to eat that are open in the evenings	3.61	10	10%	29%	14%	10%	0%	37%
Improved public open spaces, including parks and play areas	3.49	11	12%	41%	23%	18%	1%	6%
Improved seating, that is suitable for everyone	3.47	12	11%	45%	19%	21%	0%	4%
Improve the town centre	3.42	13	10%	28%	20%	15%	1%	26%
An improved mixture of free and paid for activities	3.39	14	5%	34%	31%	12%	-	17%
Improved signage for pedestrians	3.39	15	11%	36%	27%	20%	1%	5%
Improved sports and leisure facilities	3.37	16	5%	32%	25%	13%	0%	26%
Improved walking and cycling links to Exeter	3.33	17	7%	30%	21%	17%	1%	25%
Improved links between the different areas of Exmouth e.g. between the beach and the town centre	3.32	18	9%	31%	32%	19%	1%	8%

# Development options agreement scores summary by analysis group

Ranked agreement scores for each of the development options	All visitors	Staying	Day on holiday	Day from home	First time	Repeat
Developments should provide income and jobs for a variety of different business types, not just one type	1	1	2	1	1	1
Improvements to the unoccupied and derelict areas of Exmouth	2	2	1	2	2	1
Improved activities for young people aged 11 to 18	3	3	4	5	5	3
A development to encourage and support marine based businesses	4	5	3	3	3	4
Improved management of the natural environment.	5	8	9	4	8	5
Improved arts and culture facilities, such as theatres, libraries, museums, visitor centre	6	4	6	7	6	6
Improved attractions suitable for families	7	5	8	8	4	7
Improved quality of activities and facilities that are open in the evenings	8	7	5	12	7	9
Improved environmentally friendly transport links to and around the town, such as cycling, buses, trains, walking, tramway	9	9	10	6	10	8
Improved quality of places to eat that are open in the evenings	10	10	6	9	8	10
Improved public open spaces, including parks and play areas	11	15	11	11	15	11
Improved seating, that is suitable for everyone	12	11	12	13	11	12
Improve the town centre	13	14	17	9	18	13
An improved mixture of free and paid for activities	14	12	17	15	14	14
Improved signage for pedestrians	14	16	14	13	13	15
Improved sports and leisure facilities	16	13	13	16	11	16
Improved walking and cycling links to Exeter	17	18	15	18	16	17
Improved links between the different areas of Exmouth e.g. between the beach and the town centre	18	17	16	16	17	17

# Development options agreement scores summary by analysis group

Ranked agreement scores for each of the development options	All visitors	Last visited Pre-covid	Last visited since Covid	Aged <44 yrs	Aged 45 – 64 yrs	Aged 65+ yrs
Developments should provide income and jobs for a variety of different business types, not just one type	1	2	1	1	1	1
Improvements to the unoccupied and derelict areas of Exmouth	2	1	2	2	2	2
Improved activities for young people aged 11 to 18	3	4	3	3	3	5
A development to encourage and support marine based businesses	4	5	4	4	4	4
Improved management of the natural environment.	5	10	5	9	9	3
Improved arts and culture facilities, such as theatres, libraries, museums, visitor centre	6	3	6	7	5	6
Improved attractions suitable for families	7	5	8	6	6	7
Improved quality of activities and facilities that are open in the evenings	8	7	9	5	7	10
Improved environmentally friendly transport links to and around the town, such as cycling, buses, trains, walking, tramway	9	9	6	10	7	7
Improved quality of places to eat that are open in the evenings	10	8	10	8	9	13
Improved public open spaces, including parks and play areas	11	11	11	13	13	11
Improved seating, that is suitable for everyone	12	16	11	15	12	9
Improve the town centre	13	13	13	14	11	16
An improved mixture of free and paid for activities	14	12	15	12	16	15
Improved signage for pedestrians	14	17	14	17	15	12
Improved sports and leisure facilities	16	15	16	11	18	18
Improved walking and cycling links to Exeter	17	14	18	16	16	16
Improved links between the different areas of Exmouth e.g. between the beach and the town centre	18	18	17	18	14	14

# Development options agreement scores summary by analysis group

Ranked agreement scores for each of the development options	All visitors	Visited alone	Visited in a couple	Visited in a family group	Visited in an other group
Developments should provide income and jobs for a variety of different business types, not just one type	1	2	1	1	1
Improvements to the unoccupied and derelict areas of Exmouth	2	1	2	2	2
Improved activities for young people aged 11 to 18	3	3	8	3	3
A development to encourage and support marine based businesses	4	5	4	4	4
Improved management of the natural environment.	5	7	3	7	5
Improved arts and culture facilities, such as theatres, libraries, museums, visitor centre	6	4	4	7	9
Improved attractions suitable for families	7	14	4	6	8
Improved quality of activities and facilities that are open in the evenings	8	8	12	5	7
Improved environmentally friendly transport links to and around the town, such as cycling, buses, trains, walking, tramway	9	6	7	10	6
Improved quality of places to eat that are open in the evenings	10	16	9	9	10
Improved public open spaces, including parks and play areas	11	13	14	11	11
Improved seating, that is suitable for everyone	12	9	10	13	17
Improve the town centre	13	12	11	15	15
An improved mixture of free and paid for activities	14	18	17	12	12
Improved signage for pedestrians	14	9	13	17	16
Improved sports and leisure facilities	16	11	17	13	13
Improved walking and cycling links to Exeter	17	17	16	15	14
Improved links between the different areas of Exmouth e.g. between the beach and the town centre	18	14	15	18	18



# 25% of respondents providing a comment said the town had already improved a lot and it was all good/ no changes were needed

Respondents were asked if they had any comments to make about any of the development options proposals. 46% of all survey respondents had a comment to make about them and the top 10 comments (receiving 5 or more comments each) have been summarised in the table below. However, 25% of those respondents providing a comment said the town had already improved a lot and it was all good/no changes were needed whilst 14% said they didn't know/had only just arrived in the town or not been here long enough to comment.

Improvements to parking, transport links and signage were some of the areas of most concern amongst those respondents providing a comment.

Top 10 comments received about the development options	Count	%
All good - already improved a lot/no changes needed/fine as it is	46	25%
Don't know/unsure	25	14%
Parking– more/cheaper/park and ride	12	7%
Transport links - railway/buses/more taxis	11	6%
Signage – to public toilets/town centre/to beach	10	5%
Improvements are always a good idea	10	5%
Exmouth is a bit tired and run down - town centre needs attention	6	3%
More seating needed	6	3%
Public toilets - more/keep open/clean	6	3%
Evening entertainment – more activities/for children/out of season/open later	5	3%
Other comments combined	46	25%

# 19% of those respondents providing a suggestion said the town was all good/had already changed a lot and that no changes were needed

Respondents were also asked about any other proposals or ideas that they thought would improve Exmouth but which weren't on the development options list already. 63% of all survey respondents offered a suggestion and the top 12 comments (receiving 4 or more comments each) have been summarised in the table below. However, 19% of those respondents providing a suggestion said the town was all good/had already changed a lot and that no changes were needed whilst 4% said they didn't know/didn't know the area well enough to comment.

Once again parking, along with improvements to public toilets and the cleaning/tidying up the town centre were the areas of most concern amongst respondents providing a suggestion.

Top 12 other development proposals or ideas to improve Exmouth	Count	%
All good - already improved a lot/no changes needed/fine as it is	49	19%
Parking - better/cheaper/dedicated zone for campervans	34	13%
Public toilets - better/improved	16	6%
Exmouth is a bit tired and run down - town centre needs attention	14	6%
Focus on families - more for children to do/affordable activities/consider those with special needs	13	5%
Don't know/unsure	11	4%
Signage – to public toilets/town centre/to beach	10	4%
Cleaner beach/improved beach facilities	7	3%
Improve the range of shops - more independents/shopping centre outdates	7	3%
Lido/paddling/swimming pool	4	2%
Public transport – improve/disabled access	4	2%
Extend dog friendly areas/on the beach/green areas	4	2%
Other comments combined	80	32%

# Exmouth 'Placemaking' Visitor Survey 2022

## Development Themes



# Introduction – Development themes

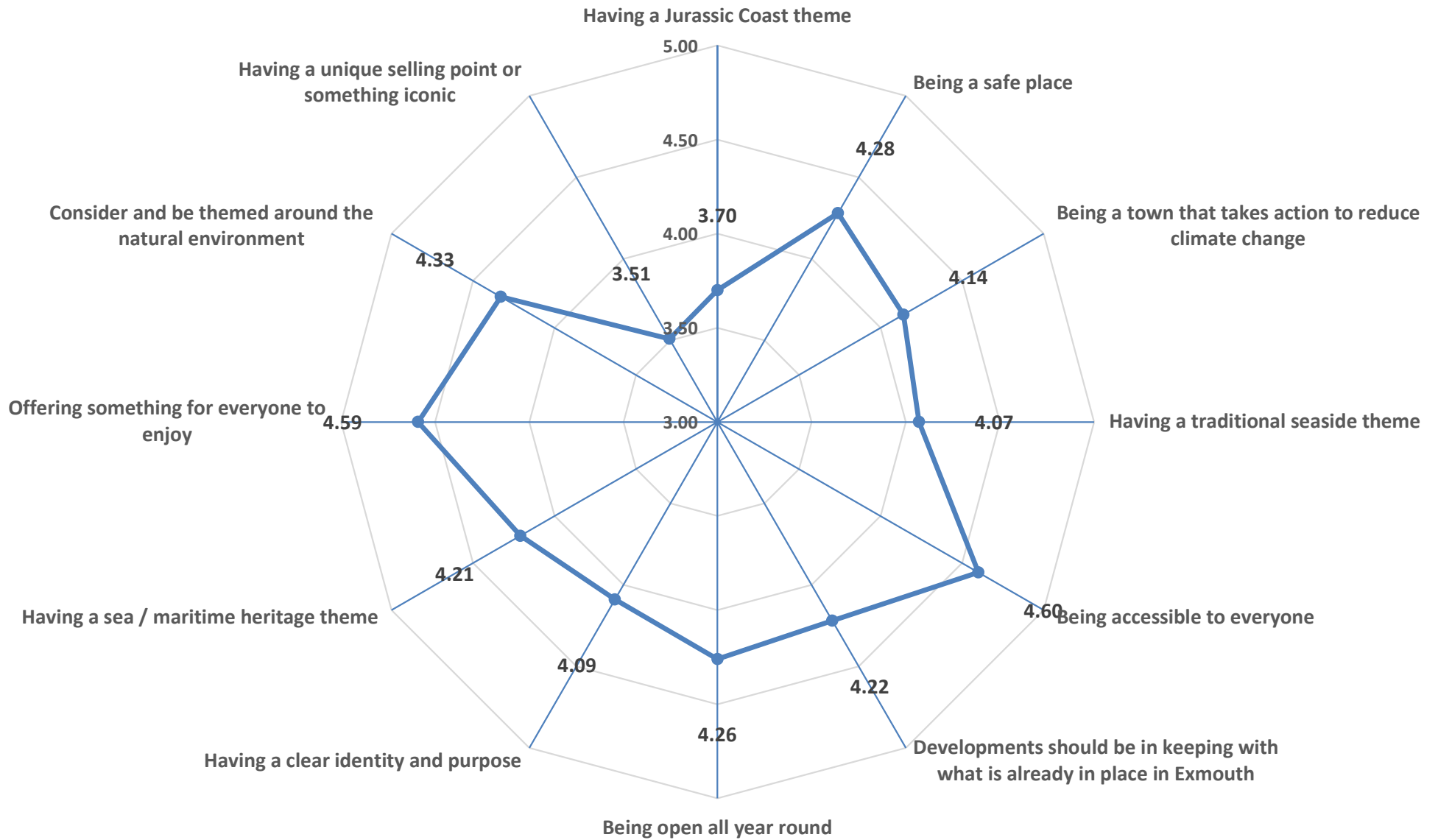
Secondly, respondents were told that when any developments take place the town also needs to consider the themes that the developments may need for example: how they appear to people, what they provide, who they are for and how they portray the town.

Respondents were then asked to rate to what extent they agreed or disagreed with each of the development themes on a scale of 'Strongly agree' to 'Strongly disagree' allowing an average agreement score out of a maximum of 5.00 to be calculated. The higher the average score calculated, the higher the level of agreement with the development theme.

The development themes included the following:

- *Having a Jurassic Coast theme*
- *Being a safe place*
- *Being a town that takes action to reduce climate change*
- *Having a traditional seaside theme*
- *Being accessible to everyone*
- *Developments should be in keeping with what is already in place in Exmouth*
- *Being open all year round*
- *Having a clear identity and purpose*
- *Having a sea / maritime heritage theme*
- *Offering something for everyone to enjoy*
- *Consider and be themed around the natural environment*
- *Having a unique selling point or something iconic*

# Development themes agreement scores



# Agreement levels were highest for: Being accessible to everyone (4.60) and offering something for everyone to enjoy (4.59)

Agreement levels were highest (4.07 or more out of max. of 5.00) with the following development themes:

- Being accessible to everyone (4.60)
- Offering something for everyone to enjoy (4.59)
- Consider and be themed around the natural environment (4.33)
- Being a safe place (4.28)
- Being open all year round (4.26)
- Developments should be in keeping with what is already in place in Exmouth (4.22)
- Having a sea / maritime heritage theme (4.21)
- Being a town that takes action to reduce climate change (4.14)
- Having a clear identity and purpose (4.09)
- Having a traditional seaside theme (4.07)

They were lowest (3.70 or less out of a max. of 5.00) for the following development themes:

- Having a unique selling point or something iconic (3.51)
- Having a Jurassic Coast theme (3.70)

# Development themes agreement scores summary

Development themes	Agreement score (max. of 5.00)	Rank	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
Being accessible to everyone	4.60	1	62%	37%	2%	0%	-	-
Offering something for everyone to enjoy	4.59	2	61%	37%	2%	1%	-	0%
Consider and be themed around the natural environment	4.33	3	41%	51%	7%	1%	-	-
Being a safe place	4.28	4	32%	65%	3%	1%	-	-
Being open all year round	4.26	5	37%	52%	10%	1%	-	0%
Developments should be in keeping with what is already in place in Exmouth	4.22	6	36%	52%	9%	2%	-	1%
Having a sea / maritime heritage theme	4.21	7	36%	51%	12%	2%	-	0%
Being a town that takes action to reduce climate change	4.14	8	30%	55%	10%	3%	-	2%
Having a clear identity and purpose	4.09	9	22%	67%	10%	1%	-	-
Having a traditional seaside theme	4.07	10	29%	52%	16%	3%	0%	1%
Having a Jurassic Coast theme	3.70	11	9%	61%	17%	10%	0%	3%
Having a unique selling point or something iconic	3.51	12	9%	46%	28%	14%	0%	4%

# Development themes agreement scores summary by analysis group

Ranked agreement scores for each of the development themes	All visitors	Staying	Day on holiday	Day from home	First time	Repeat
Being accessible to everyone	1	1	2	1	1	2
Offering something for everyone to enjoy	2	2	1	2	2	1
Consider and be themed around the natural environment	3	3	3	5	3	3
Being a safe place	4	4	7	4	4	5
Being open all year round	5	7	6	3	8	3
Developments should be in keeping with what is already in place in Exmouth	6	5	5	6	6	6
Having a sea / maritime heritage theme	7	6	4	7	5	7
Being a town that takes action to reduce climate change	8	8	8	8	7	8
Having a clear identity and purpose	9	10	9	9	10	9
Having a traditional seaside theme	10	9	10	10	9	10
Having a Jurassic Coast theme	11	11	11	11	11	11
Having a unique selling point or something iconic	12	12	12	12	12	12



# Development themes agreement scores summary by analysis group

Ranked agreement scores for each of the development themes	All visitors	Last visited Pre-covid	Last visited since Covid	Aged <44 yrs	Aged 45 – 64 yrs	Aged 65+ yrs
Being accessible to everyone	1	2	2	2	1	1
Offering something for everyone to enjoy	2	1	1	1	2	2
Consider and be themed around the natural environment	3	3	4	3	3	4
Being a safe place	4	4	5	4	3	7
Being open all year round	5	9	3	6	5	6
Developments should be in keeping with what is already in place in Exmouth	6	5	6	7	6	3
Having a sea / maritime heritage theme	7	8	7	7	6	5
Being a town that takes action to reduce climate change	8	7	8	5	8	8
Having a clear identity and purpose	9	10	9	10	8	9
Having a traditional seaside theme	10	6	10	7	10	10
Having a Jurassic Coast theme	11	12	11	11	11	11
Having a unique selling point or something iconic	12	11	12	12	12	12

# Development themes agreement scores summary by analysis group

Ranked agreement scores for each of the development themes	All visitors	Visited alone	Visited in a couple	Visited in a family group	Visited in an other group
Being accessible to everyone	1	1	1	2	2
Offering something for everyone to enjoy	2	2	2	1	1
Consider and be themed around the natural environment	3	7	3	3	3
Being a safe place	4	4	6	4	4
Being open all year round	5	3	4	6	5
Developments should be in keeping with what is already in place in Exmouth	6	5	5	6	6
Having a sea / maritime heritage theme	7	8	7	5	8
Being a town that takes action to reduce climate change	8	9	8	8	6
Having a clear identity and purpose	9	5	9	10	9
Having a traditional seaside theme	10	10	10	8	10
Having a Jurassic Coast theme	11	12	11	11	11
Having a unique selling point or something iconic	12	11	12	12	12

# 21% of respondents providing a comment said the town already had a USP with the Jurassic Coast/beach/sea/estuary/harbour

Respondents who agreed with the idea of having a unique selling point or something iconic in the town were asked if they had any ideas as to what that could be. 34% of all survey respondents had a comment to make about it and the top 12 comments (receiving 3 or more comments each) have been summarised in the table below. However, 21% of those respondents providing a comment said the town already had a USP with the Jurassic Coast/beach/sea/estuary/harbour whilst 4% said they didn't know.

The main suggestions for a USP focused around Exmouth's history/heritage, a maritime/naval theme and making more of the Jurassic Coast theme.

Top 12 ideas/suggestions for USP	Count	%
Already got one - Jurassic Coast/beach/sea/estuary/harbour	29	<b>21%</b>
Associate it with what Exmouth is famous for - local/history/heritage/historic	18	<b>13%</b>
Maritime history/naval theme	15	<b>11%</b>
Expand/make more of/Jurassic coast theme/fossils	15	<b>11%</b>
Outdoor activities - marine biology/sailing/water based activities	9	<b>7%</b>
Something educational/educational centre	5	<b>4%</b>
Don't know/unsure	5	<b>4%</b>
Dinosaur trail/park/museum	4	<b>3%</b>
Aquarium/Sealife centre	3	<b>2%</b>
Big wheel	3	<b>2%</b>
Friendly/family orientated	3	<b>2%</b>
A monument/sculptures/statue	3	<b>2%</b>
Other comments combined	25	<b>18%</b>

# 41% of respondents providing a comment said that Exmouth was all good/beautiful as it was/didn't need a development theme

Respondents were asked if they had any comments to make about any of the proposed themes for developments. 39% of all survey respondents had a comment to make and the top 11 comments (receiving 3 or more comments each) have been summarised in the table below. However, 41% of those respondents providing a comment said that Exmouth was all good/beautiful as it was/didn't need a development theme, 16% that it has already got a theme in the beach/sea/coastline etc. whilst 6% said they didn't know the town well enough to comment.

Some respondents who commented were concerned that any proposed development themes were natural/not too thematic and in keeping with the resort whilst some mentioned it having a maritime focus.

Top 11 comments received about the development themes	Count	%
All good - beautiful as it is/keep unspoilt/sells itself as it is	63	<b>41%</b>
Already got it - beach/sea/coastline/maritime theme/Jurassic coast	25	<b>16%</b>
As long as all good - nice/smart/natural/not too thematic/tacky	13	<b>8%</b>
Don't know/unsure	10	<b>6%</b>
Maritime/sea/coast	6	<b>4%</b>
Things to attract children/more for families – dinosaurs/fairgrounds	4	<b>3%</b>
Too much focus on the Jurassic coast	4	<b>3%</b>
Watersports/outdoor activities	4	<b>3%</b>
Disabled friendly/accessibility	3	<b>2%</b>
Festival/events	3	<b>2%</b>
Other comments combined	19	<b>12%</b>

# 21% of those respondents providing a suggestion said that no changes were needed/lots of changes had happened already/keep it as a traditional seaside town

Respondents were also asked about any other themes for developments that they thought would improve Exmouth but which weren't on the development themes list already. 28% of all survey respondents offered a suggestion and the top 8 comments (receiving 3 or more comments each) have been summarised in the table below. However, 21% of those respondents providing a suggestion said that no changes were needed/lots of changes had happened already/keep it as a traditional seaside town whilst 10% said they didn't know/asked whether there had to be a theme at all?

Suggestions included improving the range of things to see & do, beach/sports activities, sailing/water sports activities and focusing on nature/wildlife.

Top 8 other themes to improve Exmouth	Count	%
Don't change it - done a lot already/don't take away from its natural beauty/like it as is/traditional seaside town	23	21%
Don't know/unsure - does there have to be a theme?	11	10%
More things to see & do - amusements/attractions/theme park/crazy golf/water park/Punch & Judy/trampolines	7	6%
Beach/sports facilities/activities	6	5%
Sailing/water sports	6	5%
Nature/wildlife - enhanced more	5	5%
Developments for families	3	3%
Aquarium/sea life centre	3	3%
Other comments combined	47	42%

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