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A meeting of **Overview & Scrutiny Committee** will be held in Committee Room 2, East Pallant House on **Tuesday 17 January 2017** at **9.30 am**

MEMBERS: Mrs C Apel (Chairman), Mrs N Graves (Vice-Chairman), Mr P Budge, Mr M Cullen, Mr J Connor, Mrs P Dignum, Mr N Galloway, Mr G Hicks, Mr S Lloyd-Williams, Caroline Neville, Mr H Potter, Mr J Ransley, Mr A Shaxson, Mrs J Tassell and Mr N Thomas

SUPPLEMENT TO AGENDA – AGENDA ITEM 10 BACKGROUND PAPERS

TSE RESEARCH

The Visitor Economy of Chichester

Building the evidence base

September 2016

Prepared by:
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TSE RESEARCH

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1 Introduction

1.1 Evidence led decision-making

1.1.1 Chichester District Council is developing its vision for the City the wider district and this new vision will be at the heart of future economic and planning policy. Tourism is identified as a key growth area in the vision; latest figures show that tourism injects approximately £411.4 million pounds into the city and the wider district and sustains 14% of the total workforce.

1.1.2 To help the Council support the sector, Tourism South East's Research Unit (TSE Research) was commissioned to carry out an evidence collation exercise to provide the data and insights needed.

1.1.3 This report presents the findings of this research exercise.

1.2 Research activities

1.2.1 The project involved the following research activities.

1.2.2 **Industry audit:** A detailed review of open sources of business intelligence was carried out to pull together a database of all commercial visitor accommodation businesses and tourism attractions across the city. Open sources included the Non-Domestic Property Rates list, the Chichester BID business records list, the Valuation Office Agency website, holiday let websites, camping and caravanning websites and general internet searches.

1.2.3 A separate audit of accommodation and attractions was also carried out across the wider district to enable the Council to assess the scale of tourism supply in the city compared to the rest of the district.

1.2.4 **Economic impact of tourism:** The Cambridge Model was used to establish the volume and value of tourism in the district. The model calculates the value of tourism at district level through using a range of readily available local tourism data to disaggregate a range of regional/ county tourism statistics. As the level of analysis is at the district level, the model in its standard form is not able to separate out volume and value figures at city level.

1.2.5 **Economic impact appraisals of key city visitor attractions:** A modelling approach called PRIME was used to establish the economic importance of the Cathedral, Festival Theatre, Novium, and Pallant House to the local visitor economy. The model requires the input of a range of data about the attraction, including annual turnover, employment and visitor numbers to provide an estimate of the likely gross and net economic impacts arising from the attraction in terms of business turnover and jobs.

1.2.6 **Business survey:** A telephone survey was carried out with a sample of 252 tourism businesses from across the district to gather data on businesses performance. In addition to the core tourism businesses of visitor accommodation and attractions, the survey sample also included businesses from the wider hospitality sector including eateries, pubs and shops. Results are separately provided at city and wider district levels to enable the Council to assess performance in the city with that of the rest of the district. In total, 164 city tourism businesses and 88 wider district businesses provided feedback on trading levels, business confidence, key issues affecting performance and their perceptions of the city as a visitor destination.

1.2.7 **Visitor survey:** A face to face interview survey with a random sample of 889 visitors was carried out in the city centre to identify visitor profile, experiences of visiting the city and their perceptions of the city. The survey included both residents living in the city (PO19 postcode areas) and visiting the city centre area, and visitors living outside the city, including those who live in parts of the wider district.

1.3 Outline of report

1.3.1 Following the introduction, the results of the audit are presented in Chapter 2. Results of the Cambridge Model exercise are presented in Chapter 3 along with results of the PRIME modelling exercise.

1.3.2 The results of the business survey are presented in Chapter 4 and the results of the visitor survey are presented in Chapter 5.

1.3.3 In Chapter 6 we offer our concluding comments on key findings and implications for the Chi Vision.

2 Tourism business audit

2.1 Total tourism businesses

2.1.1 Based on data taken from the Inter-Departmental Business Register (IDBR)[1] there are a total of 6,355 businesses across the district. Tourism businesses account for 7.2% of all businesses in the district. Of this, 6.3% (401) are visitor accommodation businesses and around half of these are self-catering / holiday lets. Only 0.8% (54) businesses across the district are visitor attractions.

Table 1: Number and proportion of tourism businesses

	Number	% of total
Visitor accommodation		
B&Bs	82	1.3%
Camping and Caravan Site	42	0.7%
Guest Houses	1	0.0%
Group accommodation	24	0.4%
Hotel	12	0.2%
Pubs with rooms	35	0.6%
Self catering/holiday lets	202	3.2%
Serviced studios/ apartments	2	0.0%
Sub-total tourism businesses	*401*	*6.3%*
Visitor attractions		
Visitor Attraction, Gardens	4	0.1%
Visitor Attraction, Workplace Attractions	2	0.0%
Visitor Attraction, Museum / Art Galleries	10	0.2%
Visitor Attraction, Places of Worship	1	0.0%
Visitor Attraction, Museums / Art Galleries	7	0.1%
Visitor Attraction, Theatre	1	0.0%
Visitor Attraction, Activity operator	7	0.1%
Visitor attraction - Activity Operator	4	0.1%
Visitor Attraction, Wildlife Attraction	2	0.0%
Visitor Attraction, Farms	3	0.0%
Visitor Attraction, Leisure / Theme Parks	1	0.0%
Visitor Attraction - Racecourses & Tracks	1	0.0%
Visitor Attraction - Arts Centres	2	0.0%
Visitor Attraction, Historic Building/Houses/Other Properties	9	0.1%
Sub-total tourism businesses	*54*	*0.8%*
Total	**455**	**7.2%**

Table 2: Total number of business across district

Enterprises		
Micro (0 to 9 employees)	5,690	89.5%
Small (10 to 49 employees)	555	8.7%
Medium (50 to 249 employees)	95	1.5%
Large (250 plus employees)	15	0.2%
Total	6,355	100%

[1] *The Inter-Departmental Business Register (IDBR) contains information on VAT traders and PAYE employers in a statistical register which provides the basis for the Office for National Statistics to conduct surveys of businesses.*

2.2 Bedspace capacity

2.2.1 Visitor accommodation across the District has a capacity of almost 19,000 bed spaces. The sector with the greatest capacity is the caravan/camping/holiday park sector which has over 14,000 bed spaces (75% of all bed spaces across the District).

2.2.2 The serviced accommodation sector (Hotels, Guest Houses, B&BS, and pubs with rooms) provide 16% of total bed space across the District and 1,262 bed spaces (7% of the total) is provided by self-catering accommodation.

2.2.3 Chichester University also provides bed and breakfast accommodation from the end of June to first week of September each year. The Chichester campus offers a total of 456 single rooms to conference delegates and others staying overnight for business or other purposes. It also has a further 223 single room in its Bognor Regis campus site.

Table 3: Bed space capacity across Chichester District

	Rooms/Units/Pitches	Bed space
Serviced accommodation	1,874	3,060
Caravan/camping/holiday park accommodation	4,137	14,173
Self-catering/holiday let accommodation	281	1,262
Group accommodation	456	456
Total capacity	6,748	18,951

Figure 1: Bed space capacity by accommodation type

2.3 Tourism businesses in the City of Chichester

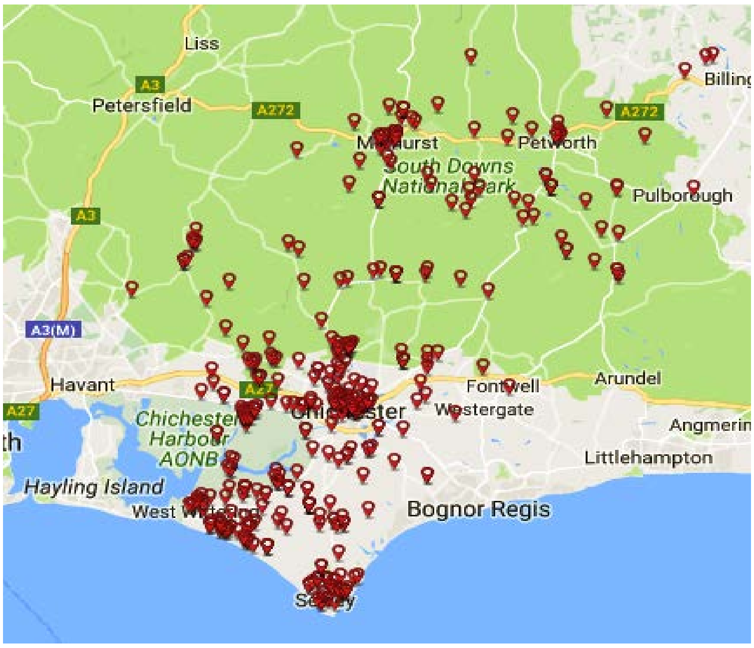
2.3.1 Of the 455 tourism business identified during this study, 77 accommodation businesses and 17 visitor attractions are located in the city. The IDBR does not publish results at tiers lower than Local Authority area so it is not possible to establish the size of tourism stock in relation to total businesses in the city.

2.3.2 However, for this study, the District Council did provide a list of all businesses paying business rates in the PO19 area which covers the city areas, and this established that there are 1,373 businesses paying business rates in the PO19 area. Whilst there are some types of businesses which do not pay business rates, e.g. farm buildings and businesses run from home, and thus will not appear on the list, it still provides a useful way for measuring the scale of tourism businesses in relation to total businesses in the city Based on the information available, tourism businesses in the PO19 area make up 6.8% of total businesses in this area.

2.4 Distribution of tourism businesses

Distribution of number of accommodation businesses

Figure 2: Map of accommodation across District

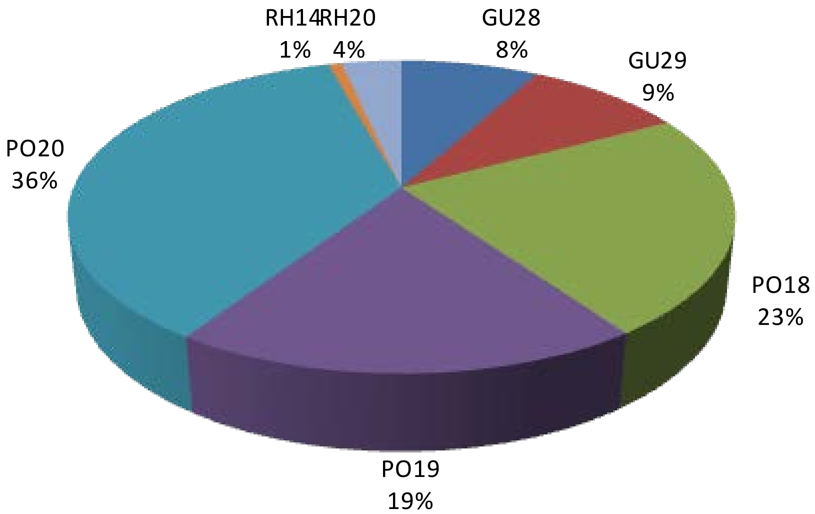


2.4.1 When we review the distribution of tourism business across the district, a fifth of visitor accommodation businesses are located in PO19 which covers the city boundary along with Fishbourne.

2.4.2 Well over a third (36%) of visitor accommodation businesses are located in PO20 which covers the towns and villages of Selsey, West Wittering, East Wittering, Tangmere, Oving, Westergate, and Eastergate.

2.4.3 PO18 which includes the towns and villages of Bosham, Boxgrove, Eartham, EastDean, Goodwood, Funtington, Nutbourne is home to a quarter (23%) of visitor accommodation businesses in the District.

Figure 3: Distribution of total accommodation by postcode sector



2.4.4 The rural towns of Petworth and Midhurst are home to 8% and 9% respectively of the District's visitor accommodation businesses. Smaller proportions of visitor accommodation businesses are spread across the remaining parts of the District.

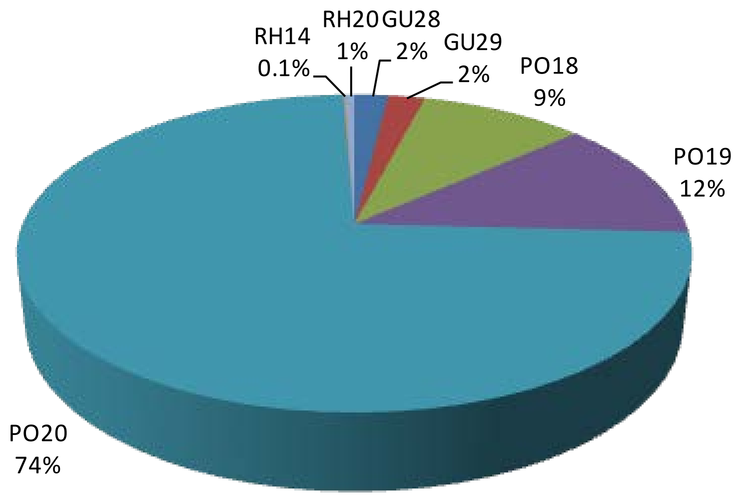
Table 4: Distribution of accommodation type by postcode sector

	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
B&Bs	10	12	20	19	13	1	7	82
Camping and Caravan Site	1	1	9	1	30	0	0	42
Group accommodation	0	0	0	1	0	0	0	1
Guest Houses	2	2	7	4	7	0	2	24
Hotel	0	3	2	5	2	0	0	12
Pubs with rooms	9	1	11	8	4	0	2	35
Self catering/holiday lets	10	18	43	37	89	2	3	202
Serviced studios/ apartments	0	0	0	2	0	0	0	2
Grand Total	32	37	92	77	146	3	14	401

Distribution of bed space capacity

2.4.5 Three quarters of total bed space across the District is in PO20. This heavy concentration is based on the fact that most of the District's camping, caravanning and holiday parks are based in the PO20 area and these include large sites like Bunn Leisure Holiday Park, Scotts Farm Caravan park, Holdens Farm Caravan Park, and White Horse Caravan Park.

Figure 4: Distribution of total bed space by postcode sector



2.4.6 A half (53%, 1,163 bed spaces out of 3,060) of all serviced accommodation bed space in Chichester District is located in the city/PO19 areas.

Table 5: Distribution of bed space by accommodation type by postcode sector

	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
B&Bs	37	62	100	107	71	4	39	420
Camping and Caravan Site	180	20	779	75	13,119	0	0	14,173
Group accommodation	0	0	0	456	0	0	0	456
Guest Houses	41	28	170	666	66	0	13	984
Hotel	0	187	335	718	73	0	0	1,313
Pubs with rooms	57	8	102	102	14	0	40	323
Self catering/holiday lets	56	93	303	195	590	14	11	1,262
Serviced studios/ apartments	0	0	0	20	0	0	0	20
Grand Total	371	398	1,789	2,339	13,933	18	103	18,951

2.4.7 Comparisons with other similar local authority areas, shows that the district has a similar number of serviced accommodation businesses and bedstock as Canterbury. It also shares with Canterbury a similar number of non-serviced accommodation and bedstock.

Table 6: Bed space capacity benchmark table

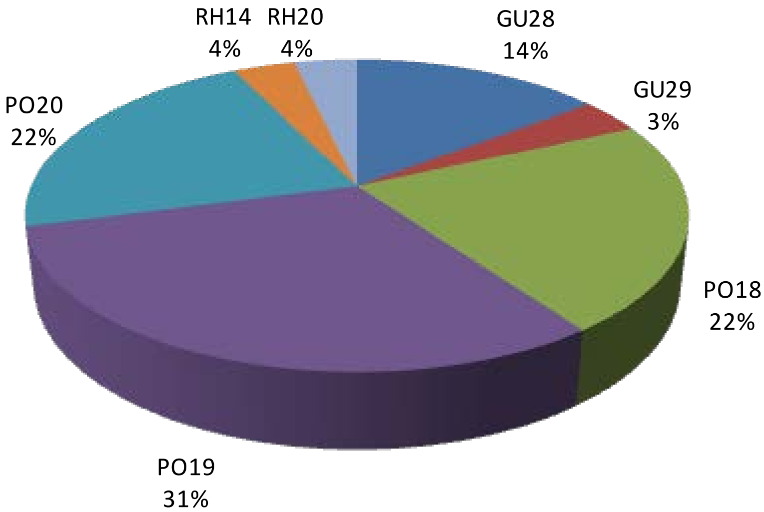
	No. of serviced accommodation businesses	No. of non-serviced accommodation businesses	Total bedspace capacity in serviced accommodation	Total bedspace capacity in non-serviced accommodation
Chichester	**155**	**245**	**3,060**	**15,891**
Bath	230	245	7,826	4,192
Canterbury	153	356	3,190	15,741
Exeter	89	68	5,941	6,055
Lewes	89	58	1,459	2,420
St Albans	45	7	2,145	31
Stratford on Avon	169	89	8,479	729
Winchester	180	59	5,110	4,220
York	250	201	10,581	4,274

Note: The comparative data is based on district boundaries for each local authority.

Distribution of visitor attractions

2.4.8 A third (17 attractions) of all visitor attractions are located in the City/PO19 area. A fifth are located in the PO20 area and a further fifth are located in the PO18 area.

Figure 5: Distribution of visitor attractions by postcode sector



2.4.9 The distribution across the district by postcode sector and type of attraction is presented in Table 7 overleaf.

Table 7: Distribution of visitor attractions by type by postcode sector

Postcode sectors	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
Activity Operator	2		2					4
Arts Centres				2				2
Racecourses & Tracks			1					1
Activity operator			2	2	2	1		7
Farms					2	1		3
Gardens		1	1		1		1	4
Historic Building/Houses	3	1	1	3			1	9
Leisure / Theme Parks	1							1
Museum / Art Galleries	1		1	5	3			10
Museums / Art Galleries	1		2	3	1			7
Places of Worship				1				1
Theatre				1				1
Wildlife Attraction					2			2
Workplace Attractions			2					2
Grand Total	8	2	12	17	11	2	2	54

3 Economic importance of tourism

3.1 Volume and value of tourism – national and regional picture

3.1.1 Results from GBTS reveal that 102.7 million domestic overnight trips were taken in England in 2015, an increase of 10% compared with 2014. The value of domestic overnight trips increased by 8%, from £18 billion to £19.6 million in 2015. Reflecting the national trend, the volume and value of domestic overnight trips in the South East also increased in 2015 compared to 2014. The volume of domestic overnight trips increased by 5% and trip expenditure also increased by 5%.

3.1.2 According to results from IPS, overseas visitors made a total of 31.8 million overnight trips in England, an increase of 7% compared with 2014. Trip expenditure increased by 2% at the national level. Overseas visitor trip volume was also up for the region; total overnight trips taken by visitors from overseas to the South East increased by 11% and trip expenditure increased by 4%.

3.1.3 Figures published in the Great Britain Day Visits Survey (2015) indicate that there were 1.3 billion Tourism Day Visits undertaken in England during 2015 (down 3% compared to 2014). Despite a small drop in volume, spend per head was slightly up, leading to an increase in day trip expenditure of 1%. The picture at regional level was rather different; the region saw a far greater fall in tourism day trips in 2015 compared to 2014. Day trip volume at regional level dropped by 5% and day trip expenditure dropped by 12%.

3.1.4 Overall, total trip volume in the South East (overnight and day) dropped by 4% and total trip expenditure dropped by 6%.

Table 8: Tourism trip volume and expenditure: national and regional

Trips by domestic overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	17,040,000	16,200,000	5%	102,730,000	93,000,000	10%
Nights	45,560,000	43,700,000	4%	299,570,000	273,000,000	10%
Spend	£2,570,000,000	£2,448,000,000	5%	£19,571,000,000	£18,085,000,000	8%
Trips by overseas overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	5,141,000	4,648,000	11%	31,820,000	29,824,000	7%
Nights	37,350,000	34,645,000	8%	241,427,000	232,846,000	4%
Spend	£2,242,000,000	£2,160,000,000	4%	£19,427,000,000	£19,081,000,000	2%
Trips by day visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	216,000,000	227,000,000	-5%	1,298,000,000	1,345,000,000	-3%
Spend	£6,696,000,000	£7,571,000,000	-12%	£46,422,000,000	£46,024,000,000	1%
Total trips						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	238,181,000	247,848,000	-4%	1,432,550,000	1,467,824,000	-2%
Spend	£11,508,000,000	£12,179,000,000	-6%	£85,420,000,000	£83,190,000,000	3%

3.2 Volume and value of tourism – Chichester

3.2.1 At destination level, tourism volume and value is monitored using tourism impact models. In West Sussex and across the South East, the Cambridge Model is used to help destinations track trends. Regular tracking has not been carried out for Chichester, and to establish a baseline, a new study was commissioned.

3.2.2 Based on the findings of the Cambridge Model, an estimated 571,000 overnight trips were taken to Chichester District in 2015 and overnight visitors spent approximately £132.3 million on their visit to the District. Day trips amounted to 5.6 million and generated a further £189.2 million in trip expenditure. In total, around £321.5 million was spent on trips to Chichester in 2015 by overnight and day visitors.

Table 9: Tourism trip volume and expenditure across District

	Total visitors	Total visitor expenditure
Domestic overnight visitors	447,701	£76,131,324
Overseas overnight visitors	123,352	£56,150,214
Day visitors	5,657,883	£189,240,307
Total visitors	6,228,936	£321,521,845

Note: Results based on 2015 Cambridge Model study

3.2.3 With the addition of multiplier expenditure and other trip-related expenditure, the total value of tourism activity across the District in 2015 is estimated to have been around £411.4 million.

3.2.4 This income to the local economy is estimated to have supported around 5,810 Full-Time Equivalent Jobs across the District. Many of these jobs are part-time or seasonal in nature and translate into an estimated 8,037 Actual Jobs. According to the Office of National Statistics, there were 56,900 employee jobs across the District in 2015. Based on these estimates, total tourism related expenditure supported 14% of these jobs.

Table 10: Total trip value (incl. Multipliers) across District

Total business turnover (incl. multiplier)	£411,429,000
Total jobs sustained	8,037
% of jobs in district	14%

Note: Results based on 2015 Cambridge Model study

3.2.5 Comparative data reveal that overall volume and value (see Table 9) is similar to Canterbury and Exeter.

Table 11: Tourism volume and trip expenditure benchmark table (1)

	Number of overnight domestic trips	Number of overnight overseas trips	Number of domestic day trips	Overnight domestic trip expenditure	Overnight overseas trip expenditure	Domestic day trip expenditure
Chichester	**447,701**	**123,352**	**5,657,883**	**£76,131,324**	**£56,150,214**	**£189,240,307**
Bath	803,000	236,000	5,680,000	£179,000,000	£103,132,000	£194,000,000
Canterbury	427,000	175,000	5,960,000	£58,000,000	£76,475,000	£178,200,000
Exeter	530,000	110,000	5,890,000	£85,000,000	£48,070,000	£221,680,000
Lewes	228,000	63,000	3,011,000	£31,191,000	£25,495,000	£90,077,000
St Albans	199,000	64,000	1,270,000	£16,000,000	£27,968,000	£38,000,000
Stratford on Avon	499,000	144,000	4,360,000	£98,000,000	£62,928,000	£131,000,000
Winchester	285,000	71,000	5,401,000	£48,261,000	£32,361,000	£193,609,000
York	1,250,000	223,000	10,320,000	£327,169,000	£313,758,000	£400,160,000

Note: The comparative data is based on district boundaries for each local authority.

Note: Visitor volume and expenditure data for other local authority areas comes from District level breakdowns we obtained from the national tourism surveys specifically for this exercise and not from Cambridge Model studies.

Table 12: Tourism volume and trip expenditure table (2)

	Total trip volume	Total trip expenditure
Chichester*	**6,228,936**	**£321,521,845**
Bath	6,719,000	£476,132,000
Canterbury	6,562,000	£312,675,000
Exeter	6,530,000	£354,750,000
Lewes	3,302,000	£146,763,000
St Albans	1,533,000	£81,968,000
Stratford on Avon	5,003,000	£291,928,000
Winchester	5,757,000	£274,231,000
York	11,793,000	£1,041,087,000

3.3 Economic impact of city attractions

3.3.1 There are 54 visitor attractions across the District, and 17 of these are based in the City/PO19 area. The main city centre based attractions are Chichester Cathedral, Festival Theatre, Pallant House, and The Novium.

3.3.2 A study of the economic impact of these attractions on the economy show that in together these attractions generate £15.7 million annually for businesses across the City, District and the wider region.

Table 13: Economic impact of city attractions

Expenditure	Chichester Cathedral	Festival Theatre	Pallant House	The Novium	Total
City	£5,213,920	£7,700,328	£1,258,170	£471,619	£14,644,037
Wider district and region	£454,414	£519,073	£87,480	£50,676	£1,111,643
Total	£5,668,334	£8,219,401	£1,345,650	£522,296	£15,755,681
FTE jobs					
City	78.5	87.7	21.1	7.1	194.4
Wider district and region	7.4	8.4	1.4	0.8	18.0
Total	85.8	96.2	22.5	7.9	212.4

Chichester Cathedral:
Generates £5.6m/Sustains 85.8 FTE jobs

Festival Theatre:
Generates £8.2m/Sustains 96.2 FTE jobs

Pallant House:
Generates £1.3m/Sustains 22.5 FTE jobs

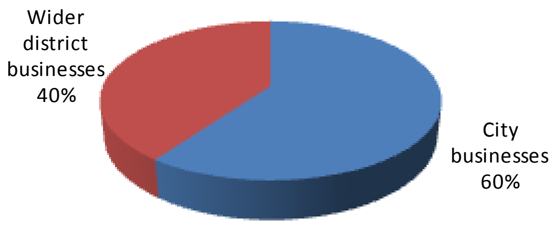
The Novium:
Generates £522,300/Sustains 7.9 FTE jobs

4 Tourism business survey

4.1 Respondent business profile

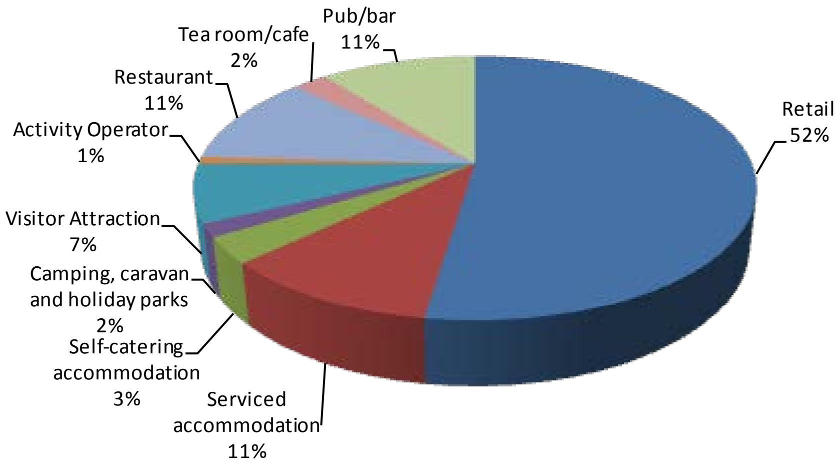
4.1.1 Tourism and hospitality businesses from across the district were contacted by phone and invited to take part in a survey to find out about their trading levels and city businesses are additionally asked about their perceptions of the city.

Figure 6: Distribution of business sample by city and wider district



4.1.2 In total, 252 businesses took part in the survey. 60% were city businesses and 40% were businesses operating elsewhere in the district. Around half of the sample was made up of retail businesses and many of these were shops based in the city.

Figure 7: Distribution of business sample by business type



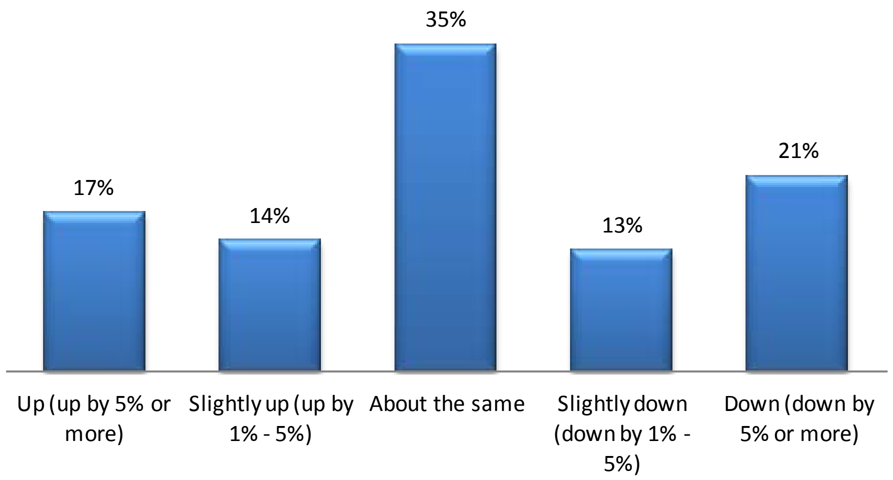
4.1.3 Around half of the sample was made up of retail businesses and many of these were shops based in the city (65% of all the retail businesses taking part in the survey were based in the city).

Figure 8: Distribution of business type by city and wider district

4.2 Business performance

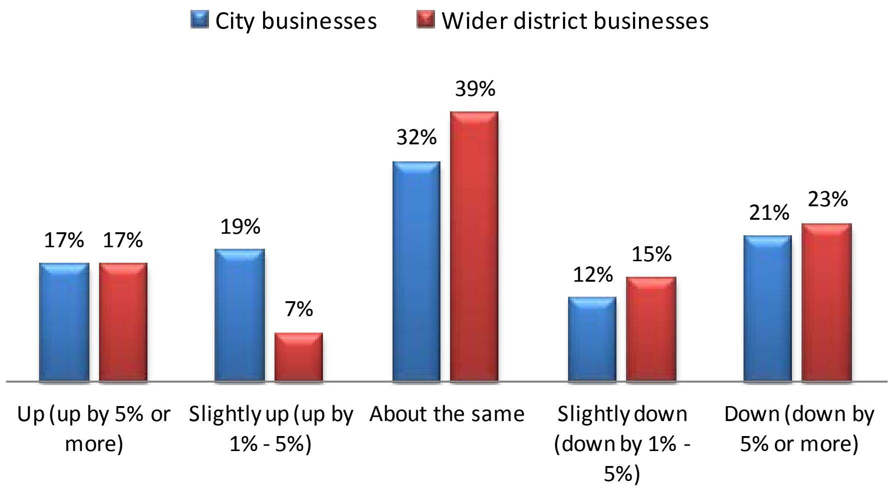
4.2.1 Feedback from businesses on trading levels from the start of the year to end of July compared to the same period last year, reveals that around a third (31%) saw performance go up or slightly up, another third (35%) experienced no significant change, and a third (34%) saw performance go down or slightly down.

Figure 9: Business performance Jan to Jul 2016 compared to last year



4.2.2 Results split between city and wider district businesses reveal that performance was generally higher among city businesses.

Figure 10: Business performance Jan to Jul 2016 compared to last year by city and wider district



4.2.3 Results by business type are presented in Table 11 below. However, it is not possible to draw any clear cut insights as the samples for some business types are very small.

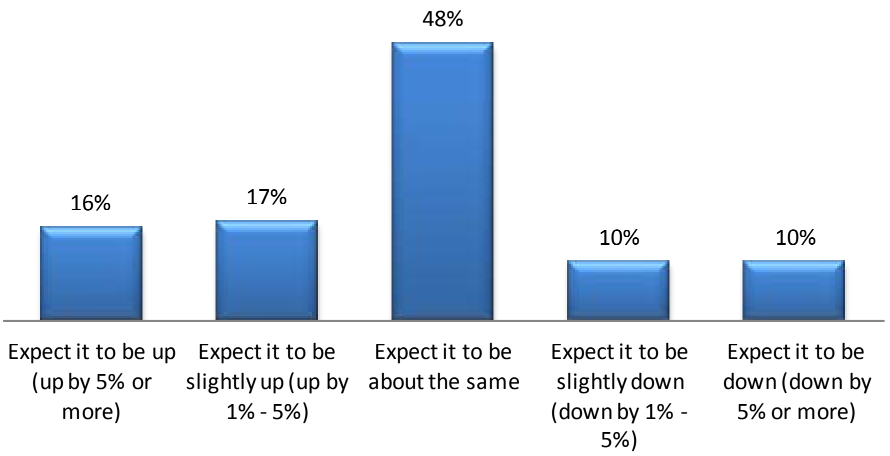
Table 14: Business performance Jan to Jul 2016 compared to last year by business type

Performance has been:	Retail	Serviced accommodation	Self-catering	Camping/caravan	Visitor Attraction	Activity Operator	Restaurant	Tea room/cafe	Pub/bar
Base	132	27	8	4	18	2	28	6	27
Up	14%	15%	13%	25%	28%	50%	21%	0%	22%
Slightly up	17%	7%	0%	0%	6%	0%	21%	33%	4%
About the same	29%	33%	25%	50%	61%	50%	36%	33%	44%
Slightly down	17%	15%	13%	0%	0%	0%	11%	0%	11%
Down	23%	30%	50%	25%	6%	0%	11%	33%	19%

4.3 Expectations for rest of year

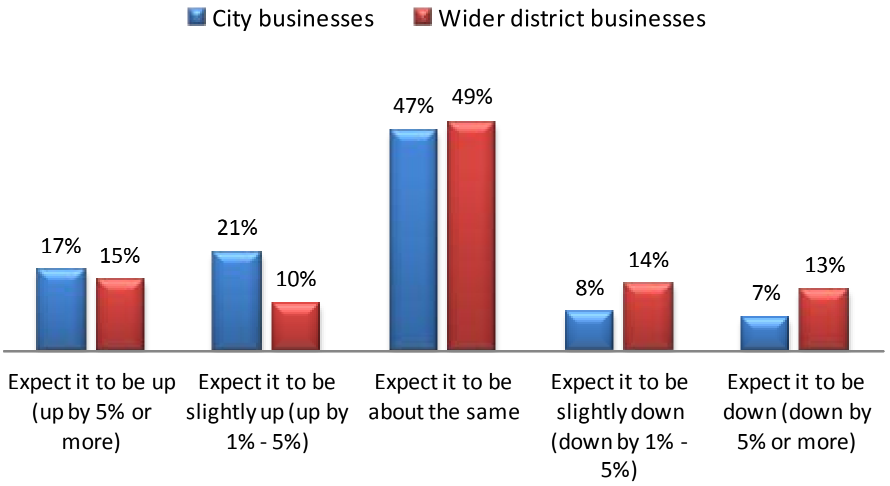
4.3.1 Looking ahead to the rest of the year, just under half (48%) of all businesses expect performance to be similar to the year before.

Figure 11: Expectations of business performance for the rest of the year



4.3.2 The same results split between city and wider district businesses reveal that city businesses are generally more optimistic about the year ahead.

Figure 12: Expectations of business performance for rest of this year by city and wider district



4.3.3 Results by business type are presented in Table 12 below. As indicated earlier, caution needs to be applied in the interpretation of the results given the small samples for some business types.

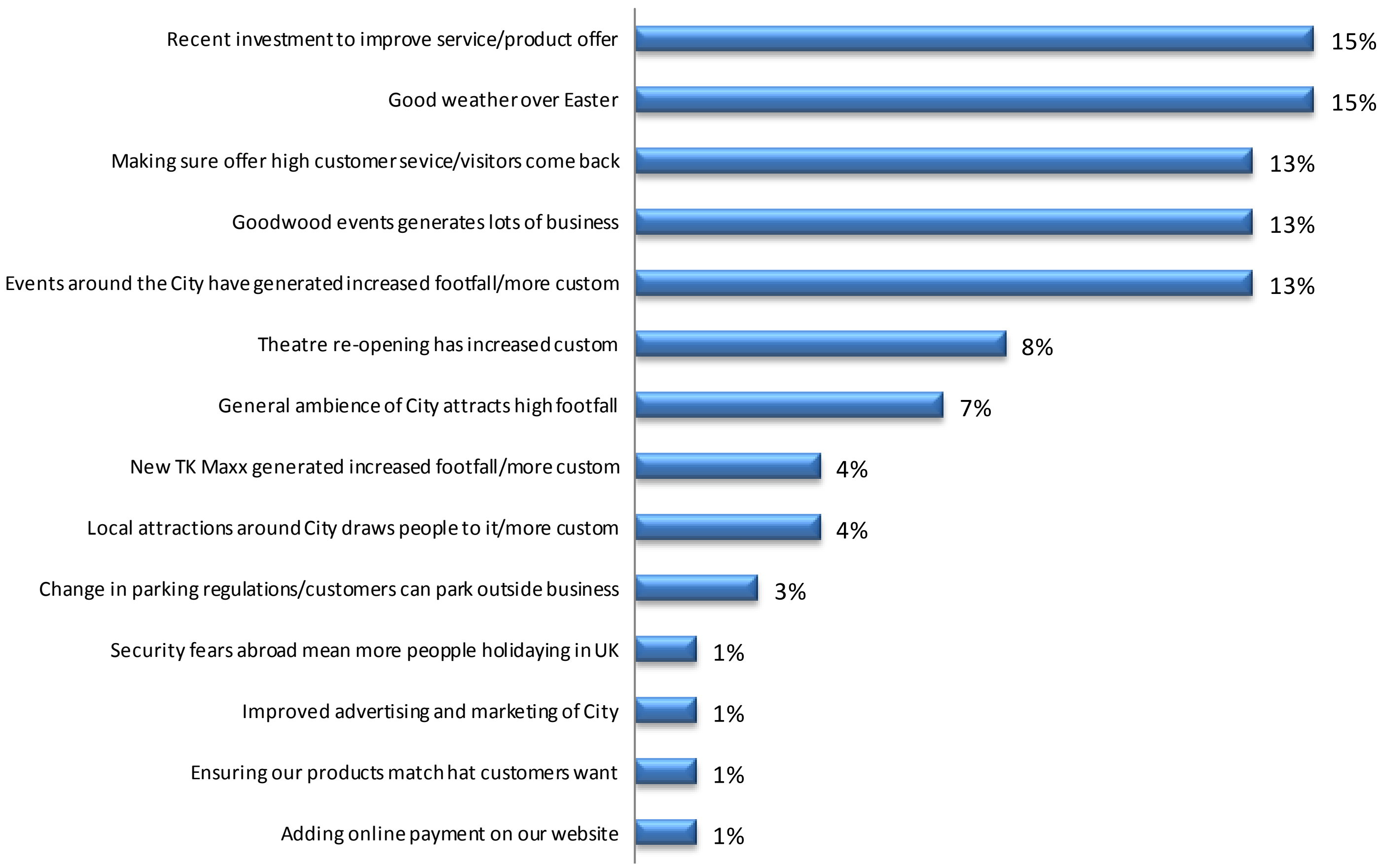
Table 15: Expectations of business performance for rest of this year by business sector

Expect performance to be:	Retail	Serviced accommodation	Self-catering	Camping/caravan	Visitor Attraction	Activity Operator	Restaurant	Tea room/cafe	Pub/bar
Base	132	27	8	4	18	2	28	6	27
Up	14%	7%	0%	25%	11%	50%	36%	17%	19%
Slightly up	20%	15%	38%	0%	11%	0%	14%	0%	7%
About the same	47%	59%	13%	25%	67%	0%	39%	50%	52%
Slightly down	9%	11%	25%	50%	11%	0%	4%	17%	11%
Down	10%	7%	25%	0%	0%	50%	7%	17%	11%

4.4 Main factors behind increase in performance

4.4.1 Recent investments in the business and good weather over Easter were to two main factors mentioned the most often by businesses for the improvement seen in performance since the start of the year.

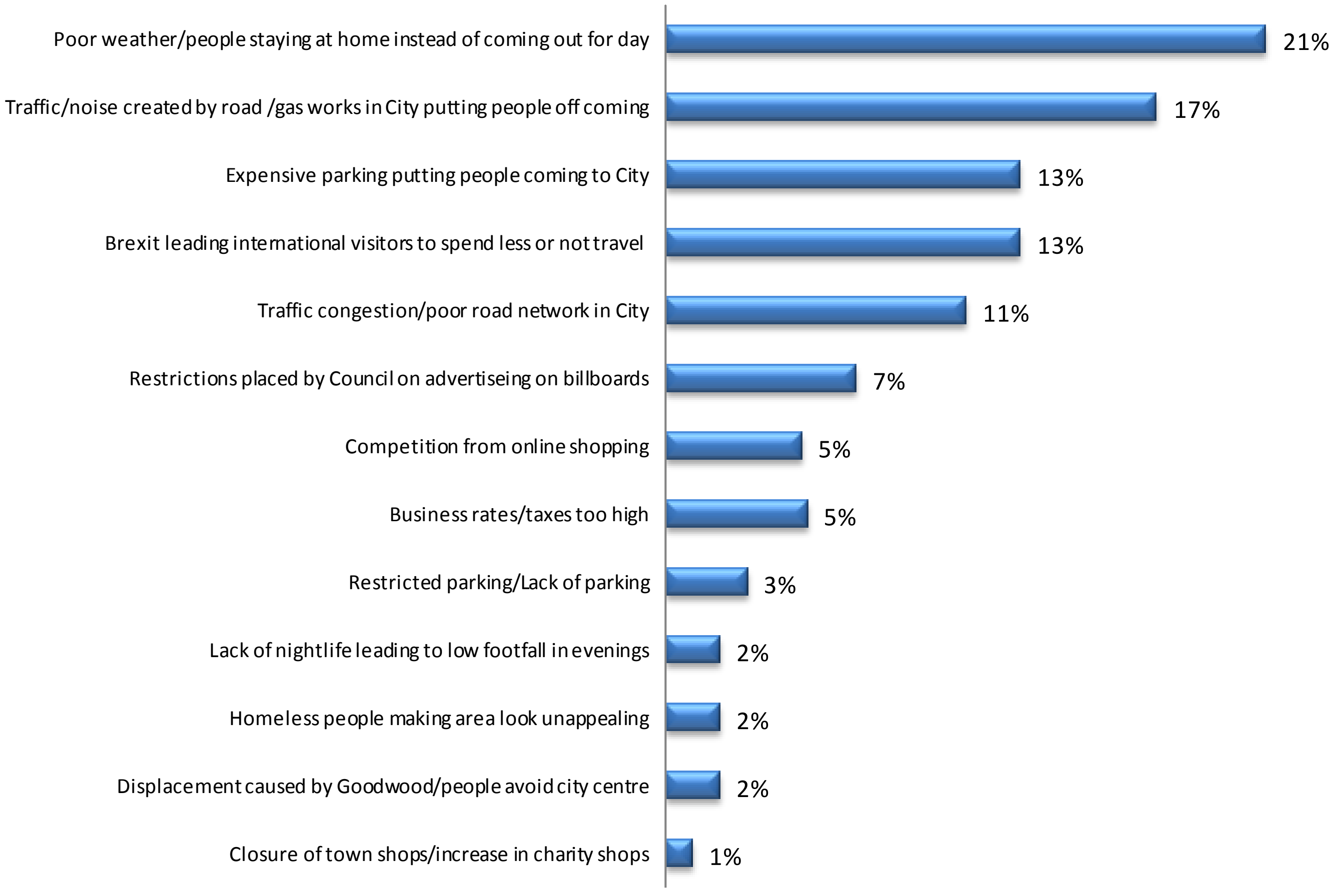
Figure 13: Main factors behind increased in performance



4.5 Main factors behind drop in performance

4.5.1 With the exception of good weather over parts of the Easter period, the country generally experienced an unseasonably cold spell up to May and the month of June is claimed by some to have been the wettest June since records began. July too experienced unsettled weather conditions for much of the first half of the month, with a short hot spell between the 17th and 23rd. In view of this, it is not surprising to see that a fifth of businesses blamed the weather on a fall in trade over the first six months of the year.

Figure 14: Main factors behind drop in performance



4.6 Key issues likely to affect future trade

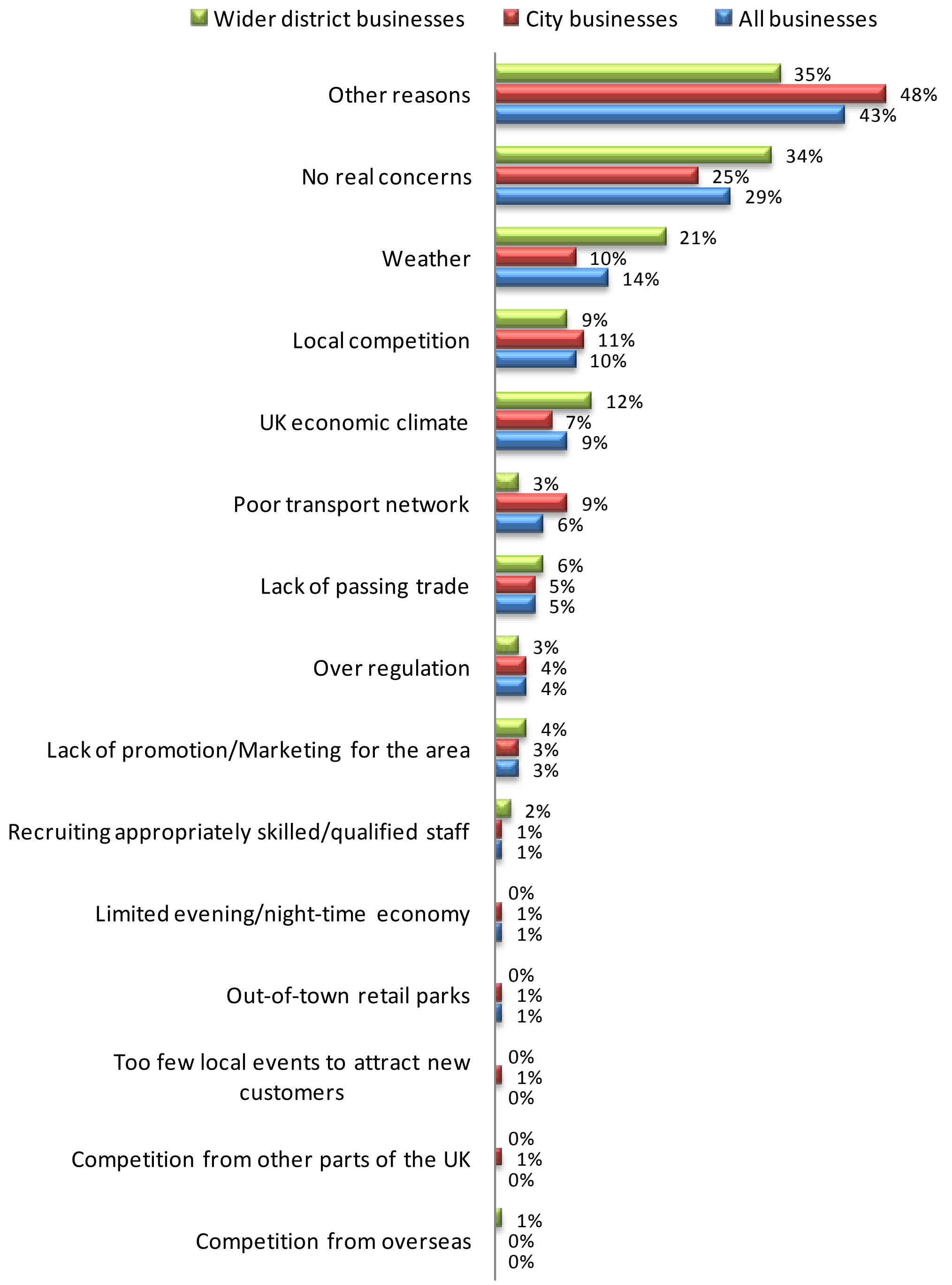
4.6.1 Businesses were asked about the key issues they felt would affect the future performance of their business. To help manage responses a number of possible factors affecting performance were presented on a list and businesses were asked to select those that applied to them.

4.6.2 Just under a third of all businesses (29%) replied that there were no specific issues they could see which would affect their future performance.

4.6.3 Overall 14% of businesses replied that they are affected by weather conditions and would continue to be so in the future. The proportion is higher for wider district businesses where more are outdoor attractions and camping/caravanning parks which are more seasonal in their operations are located. Local competition and the state of the UK economic climate are factors which 1 in 10 businesses believe will affect their future performance.

4.6.4 Overall 5% of businesses believe that a lack of passing trade will affect future performance. The main reason for the lack of passing trade among city businesses is the belief that fewer people will visit the city centre in the near future as a result of more online shopping and out of town shopping centres. Other reasons blamed for the lack of passing trade is the perceived lack of parking for visitors and expense of parking.

Figure 15: Key issues believed to affect current and future business performance



4.6.5 Overall, a third of businesses (87 out of the 252, 35%) felt that there were 'other' factors which would impact on future performance. Verbatim responses were taken and the analysis of these reveals that a fifth feel that the cost of parking in the city would put visitors off coming.

4.6.6 The EU referendum took place during the survey period and the immediate impact was very strong for a proportion of tourism and hospitality businesses; 14% of those businesses providing ‘other’ responses felt that leaving the EU could lead to economic uncertainty, as a result of existing customers spending less and fewer new visitors from EU member countries.

4.6.7 An equal proportion also felt that the disruption to trade caused by the ongoing road works on A27 was affecting current performance and would do so until the road works were completed.

4.6.8 The perceived high costs of business rates and business rents and the traffic congestion in and around the city were also other factors affecting trading levels mentioned by a number of businesses.

Table 16: ‘Other’ issues believed to affect current and future performance

Expensive parking which is putting visitors coming into the city centre	20%
Impact of Brexit/creating uncertainty/could be fewer foreign visitors	14%
The ongoing road/gas works which is causing significant disruption	14%
High cost of business rates and rents	13%
Traffic congestion in and around city and on A27 putting people coming to city	10%
Competition from online retailers	8%
Council forcing us to remove our front of building A frame advertising	8%
Lack of parking in this area/nowhere convenient to park so customer don’t stop	6%
Absence of a nightlife means footfall is very low in the evenings	1%
Customers are becoming more demanding/struggling to meet those demands	1%
Lack of large department stores which draw people to the city centre	1%
Lack of signage - people don't know we are here	1%
Large out of town events like Goodwood Festival take people away from the city centre	1%
Rising staffing costs	1%
The amount of homeless people on street which is putting people off visiting city centre	1%

Note the responses in Table 16 are based on the 35% of businesses which mentioned ‘Other’ issues.

4.7 Changes seen in profile of customers

4.7.1 Business were asked if they had seen any changes in their customer base in recent years. The vast majority, 87% reported that no significant changes had been observed.

4.7.2 Among the 13% of businesses who had experienced changes, a third observed that customers have been generally spending less than they use to.

Table 17: Changes seen in customer profile

Base	33
Customers generally spending less than they use to	32%
fewer young visitors/students	14%
customers getting more demanding	11%
Customers getting younger	11%
Fewer foreign customers	7%
B&Bs old fashioned for young/customers are now 50 plus	4%
Customers expect us to stay open for longer/open in evenings now	4%
More customers from London	4%
More customers shopping with us online	4%
More last minute bookings/customers leaving it until last minute	4%
More retired customers	4%
More wedding business	4%

Note low sample – only 33 businesses

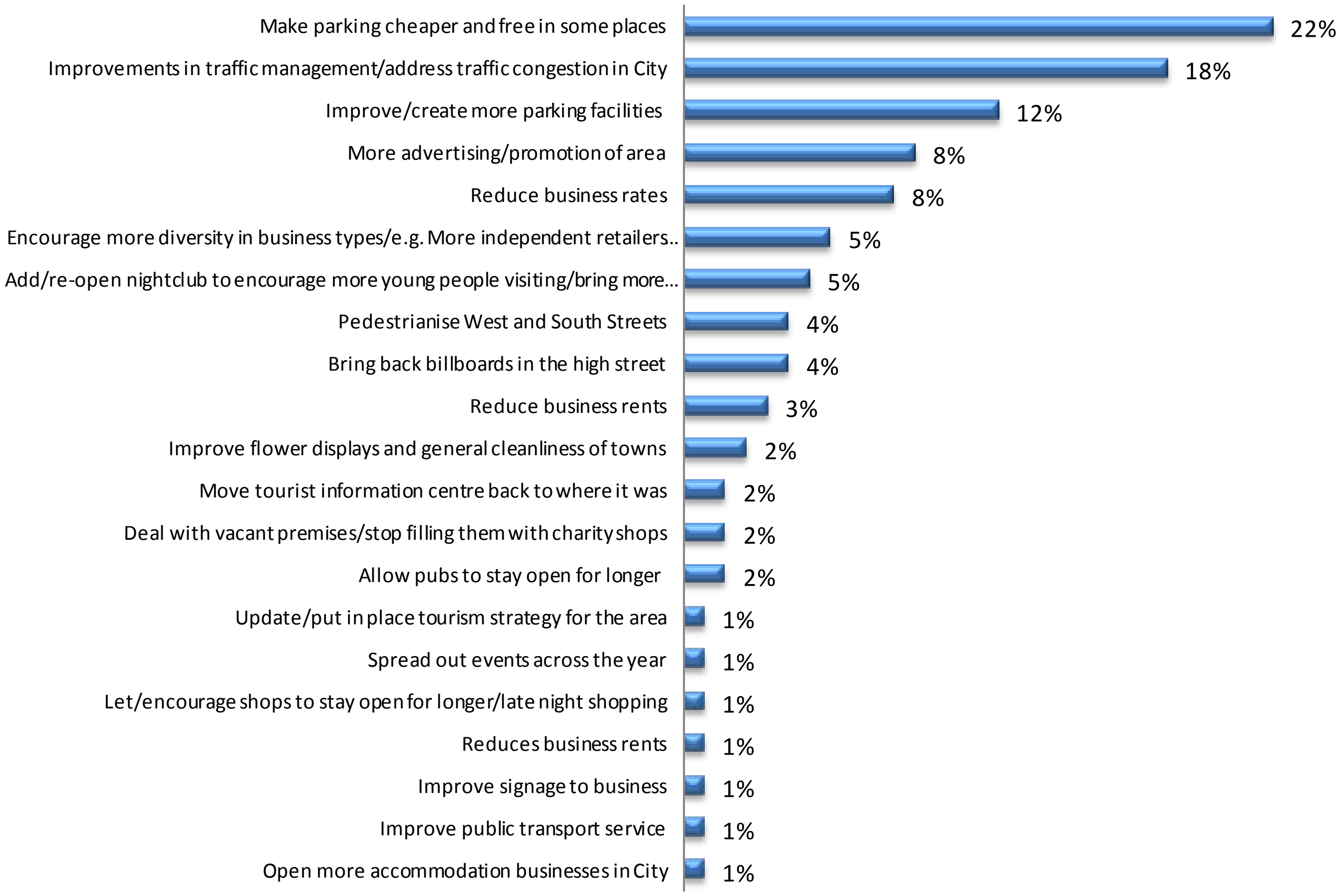
4.8 Key changes businesses would like to see implemented

4.8.1 Businesses were asked which changes if implemented they believed would improve the performance of their own business and the local economy more generally.

4.8.2 A fifth believe that making parking cheaper and free in some places would encourage more visitors to the area and by improving footfall would enhance the opportunities for more trade.

4.8.3 Just under a fifth wanted to see improvements to managing traffic and improving the road network to address the traffic congestion and bottlenecks seen at particular times of the day.

Figure 16: Key changes business would like to see implemented



4.9 Business perceptions of Chichester City

4.9.1 City businesses were asked a specific set of questions about their perceptions of the city. They were asked what they thought were the best and worst things about the city. This was an 'open-ended' question and the verbatim results were analysed and grouped into specific areas. The results presented in Fig. 17 and Fig. 18 have been weighted by the frequency in which they were mentioned to reveal the aspects of the city that are seen to be the most important.

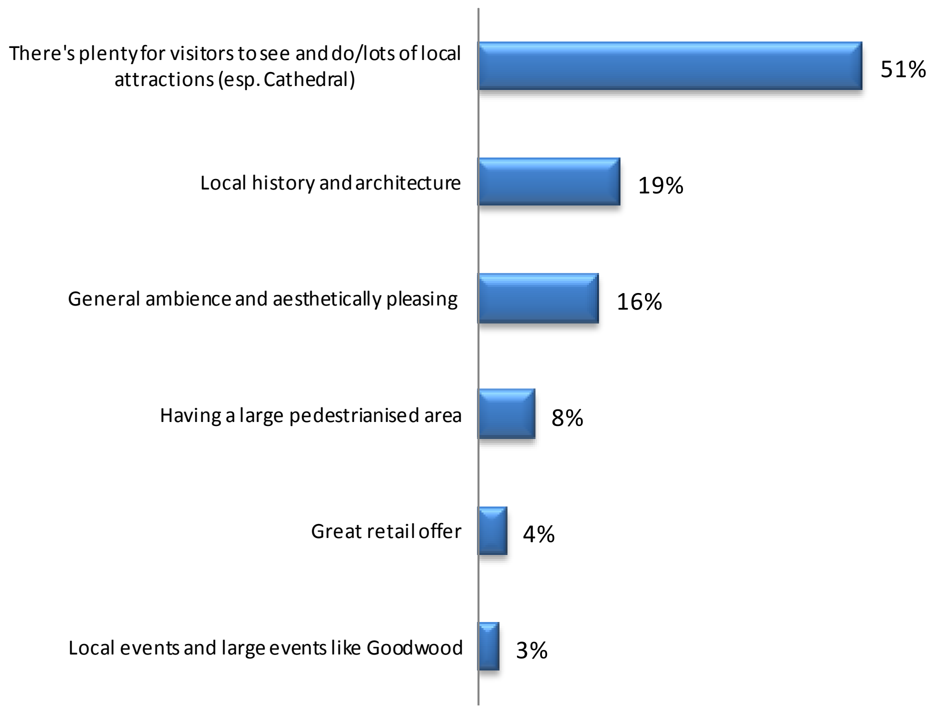
4.9.2 From the perspective of city businesses, the wide range of things to do and see in and around the city was the top 'best' thing about the city. Mentioned by a half of all city businesses, this aspect was seen as a positive feature that benefited everyone visiting the city – both locals and tourists. Many references were made to city attractions, particularly the Cathedral and the range of events.

There's a cinema and a gym and good historical things to visit, it's got everything a tourist would want really.

The best things are the tourist attractions. The Cathedral is a big draw. The Festival Theatre and Goodwood motor circuit always bring people in.

The Cathedral, the Festival Theatre, Pallant House, its proximity to the coast and South Downs, and easy access to London.

Figure 17: Best things about the city



4.9.3 For a fifth of city businesses, the heritage and historical architecture of the city is the best thing about the city. Other 'best' things mentioned were the ambience and attractiveness of the city (mentioned by 16% of businesses), the advantages offered to visitors and shoppers of a large pedestrianised area, making it easy to get around on foot (mentioned by 8% of businesses), the diverse and high quality shops (mentioned by 4% of businesses) and the hosting of local events and large events like Good Festival (mentioned by 3% of businesses).

4.9.4 When businesses were asked what they thought was the worst thing about the city, a wider range of responses was provided. The most frequently mentioned aspect was the view that the city suffers from very heavy traffic congestion which many felt acted as a deterrent to people visiting the city.

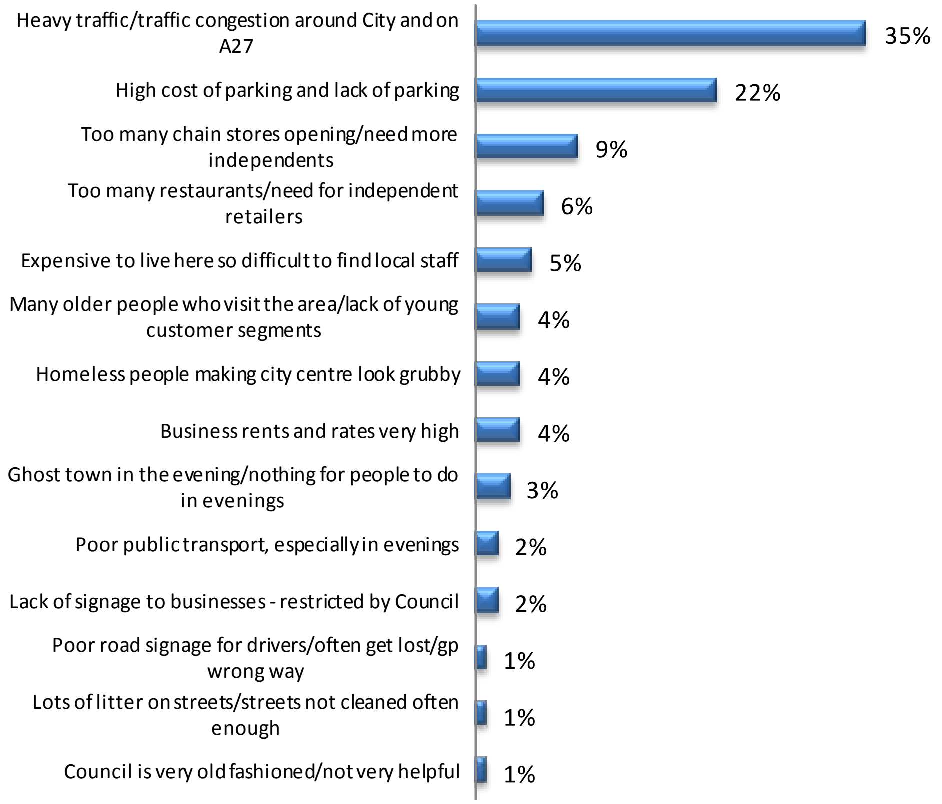
4.9.5 The perceived high cost of parking, a view which was often combined with the opinion that the city lacked adequate parking provision was the second most ‘worst’ thing about the city (mentioned by a fifth of businesses).

The A27 is a nightmare. It is always snared up. It needs to be more fluid and they need to stop talking and put their plans to tackle it into practice.

The main issue is getting people into the city. The A27 is not fit for purpose anymore and so it makes it very hard to get in and out of Chichester.

The car parking is very bad. It’s too expensive and inconvenient.

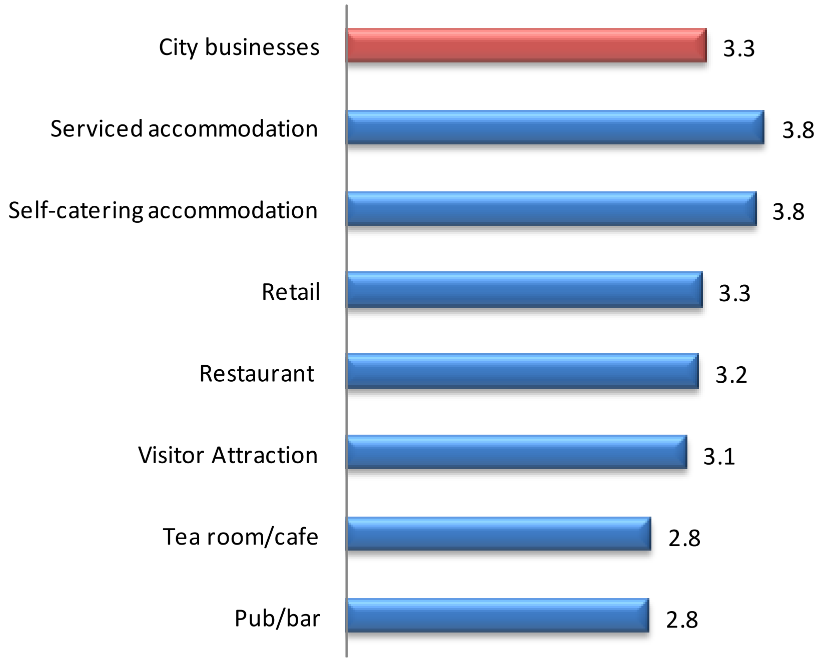
Figure 18: Worst things about the city



4.9.6 The final perception question posed to businesses was where on a scale of ‘vibrancy’ (ranging from 1 to 5) did they think Chichester City sits. The scale was ‘Behind the times/old fashioned’ at one end of the scale (rating of 1) and ‘vibrant and cosmopolitan’ is at other (rating of 5).

4.9.7 The overall average rating score provided by city businesses was 3.3 out of 5, indicating that most felt that the city sat somewhere in the middle of the vibrancy scale. Results by sector show that serviced accommodation businesses tend to see the city as being more cosmopolitan and vibrant than the other business types.

Figure 19: Vibrancy rating scale



5 Visitor survey

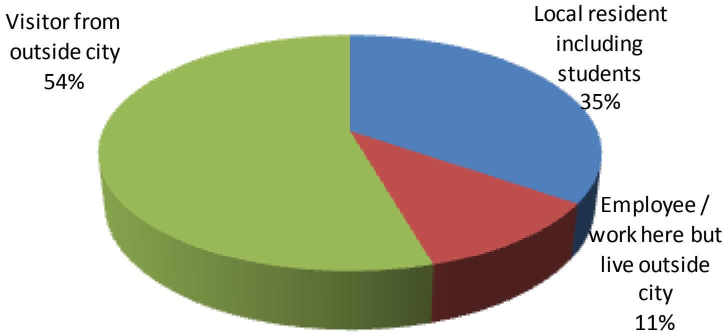
5.1 Visitor profile

Type of visitor

5.1.1 Just over half of the visitor sample is made up of visitors who live outside the City of Chichester (54%). Local residents including students living in the city (35%) and employees who work in the city but live elsewhere (11%) make up the other half.

5.1.2 The sample for employees is too small to provide separate results so for clarity and ease of reporting, residents, including students living in the city and employees are grouped together as 'Residents' in the tabulated results.

Figure 20: Type of visitor



Visitor origin/normal place of residence

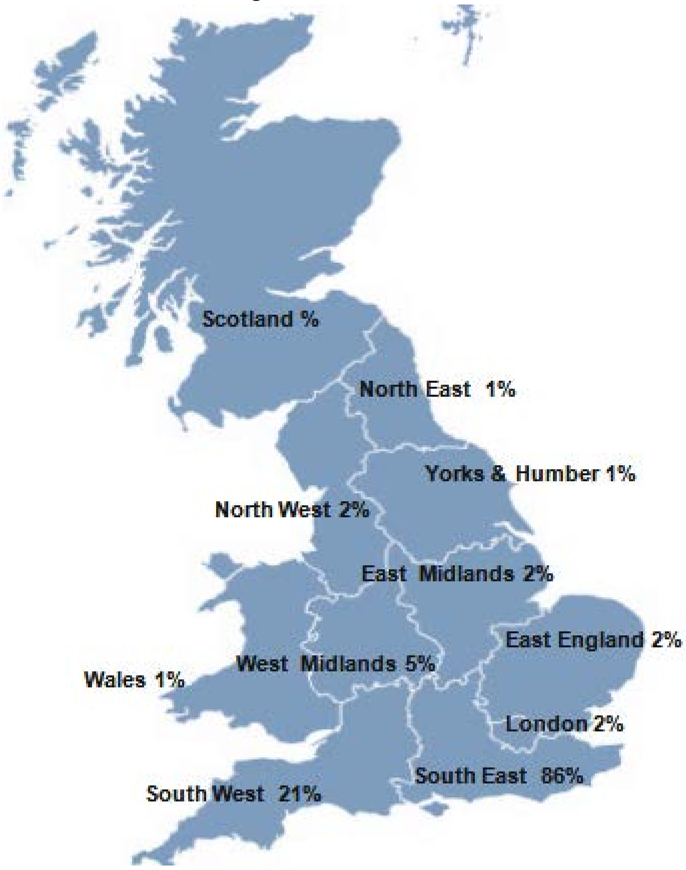
5.1.3 Among visitors from outside the city, the vast majority (95%) came from other parts of the UK and half of these come from Sussex and a quarter come from Hampshire. At regional level, 86% of visitors are from the South East.

5.1.4 At town level, around a fifth of city visitors were found to come from neighbouring towns within the district, mainly the PO20 and PO18 postcode areas of Selsey, West Wittering, East Wittering, Tangmere, Oving, Westergate, Eastergate, Bosham, Boxgrove, Eartham, East Dean, Goodwood, Funtington, and Nutbourne (see Appendices for a full list of towns).

Table 18: Top ten counties domestic visitors come from

	486
Sussex (East and West)	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%

Figure 21: Region of residence among domestic visitors



5.1.5 A relatively small proportion of visitors were from overseas and the main countries of residence are Australia, the USA and Germany. At only 5%, this is lower than a number of other historic cities, and lower than the 10% of overseas visitors found to make up the visitor market during the previous visitor survey in 2008. The proportion is, on the other hand, the same as that found in the 2005 visitor survey. In light of this, the proportion of overseas visitors appears to have returned to the 2005 level. We should highlight, however, that the 2005 visitor sample was only 223 and therefore, will carry a relatively high margin of error.

Table 19: Trends in proportion of overseas visitors

	% of overseas visitors
2016	5%
2008	10%
2005	5%

Source: City level visitor surveys carried out by TSE Research

Table 20: Proportion of overseas visitors in other historic cities

	% of overseas visitors
Bath	28%
Oxford	42%
York	15%

Source: 2015 vsurveys identified from open sources

Visitor age

5.1.6 The age profile of visitors is older than residents; 59% are aged 55 years and over compared to 38% of residents. Visitors to the city are also more likely to be retired than visitors who are city residents.

Table 21: Visitor age profile

	Overall	Resident	Visitor
Base	892	405	487
0-15 years	3%	1%	4%
16-24 years	14%	19%	9%
25-34 years	14%	20%	10%
35-44 years	9%	9%	9%
45-54 years	16%	15%	16%
55-64 years	18%	12%	23%
65+ years	32%	26%	36%

Table 22: Proportion of retired visitors

	Overall	Resident	Visitor
Base	892	404	488
Yes	30%	23%	36%
No	70%	77%	64%

Group size and composition

5.1.7 Two thirds of local residents visit the city centre on their own. A third of visitors from outside the city also visit on their own and another third visit with their partner/spouse.

Table 23: Group composition

	Overall	Resident	Visitor
Base	891	404	487
By myself	49%	69%	33%
With family	16%	12%	20%
With partner/spouse	24%	11%	34%
With friends and family	4%	3%	5%
With friends	6%	4%	8%
Work colleague/Business associate	0%	1%	0%

5.1.8 The average group size among visitors is 1.9 people.

Figure 22: Average visitor group size

Visitor socio-economic status

5.1.9 A quarter of resident and non-resident visitors to the city are from AB occupational grades (this includes retired people as the grade is based on their previous occupations). The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

5.1.10 The largest group come from the C1 grade which is made up of supervisory, clerical, and junior managerial and junior administrative occupations (42% overall, 45% residents and 40% visitors), and a further quarter are from the C2 occupational group (skilled manual works).

5.1.11 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income make up 10% of city visitors.

Table 24: Visitor occupational grade

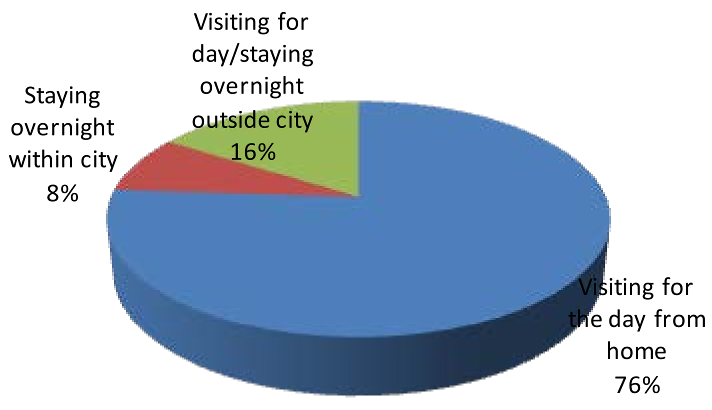
	Overall	Resident	Visitor
Base	856	388	468
AB	24%	24%	25%
C1	42%	45%	40%
C2	22%	16%	25%
DE	12%	15%	10%

5.2 Trip features

Day and overnight tourist visitors

5.2.1 The vast majority of visitors are on a day trip; 76% are visiting from their homes and a further 16% are visiting for the day whilst staying overnight outside the city during holiday and other purposes. Only 8% of visitors were found to be staying overnight in the city. This low in comparison to a number of other historic cities and a fall on the 13% found to be staying overnight in the city in 2008[2].

Figure 23: Proportion of day and overnight visitor



[2] *The earlier 2005 study found that 37% of visitors were staying in the city. However, as we have established the survey was based on a sample of only 223 visitors and the interviewing period also stretched all the way to October. In view of the small sample and different survey period, the results are not directly comparable and will contain a high margin of error and are not reliable to use for trend purposes.*

Proportion of overseas visitors in other historic cities

	% of overnight visitors
Bath	56%
York	49%

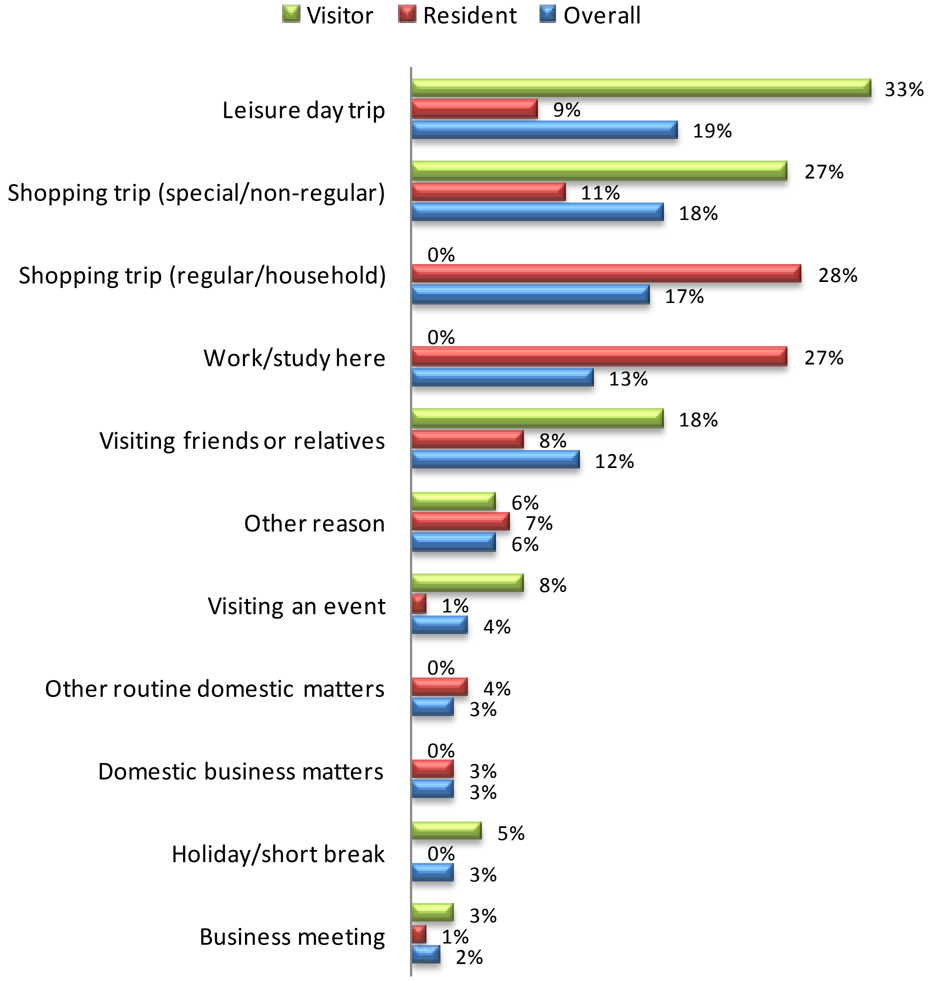
Source: recent surveys identified from open sources

Main reason for visiting

5.2.2 The survey found that there are two main reasons why visitors from outside the city visit the city; these are a leisure day out (33%) and a special shopping trip (27%).

5.2.3 The main reasons residents visit the city centre are to do their regular domestic shopping or because they live, work or study in the city centre area.

Figure 24: Main reasons for visiting



Length of stay

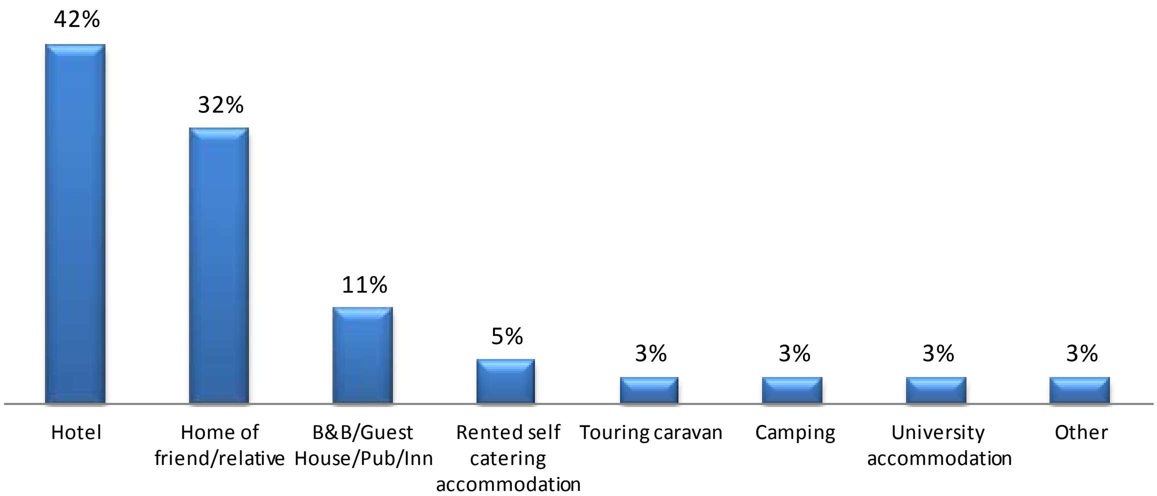
5.2.4 Day visitors spend on average 3.4 hours on their trip to the city and overnight visitors staying in the city spend on average 3.9 nights on their trip.

Figure 25: Average length of stay

Accommodation used

5.2.5 The types of accommodation used the most often by overnight visitors are hotels (42%) and the home of friends or relatives (32%).

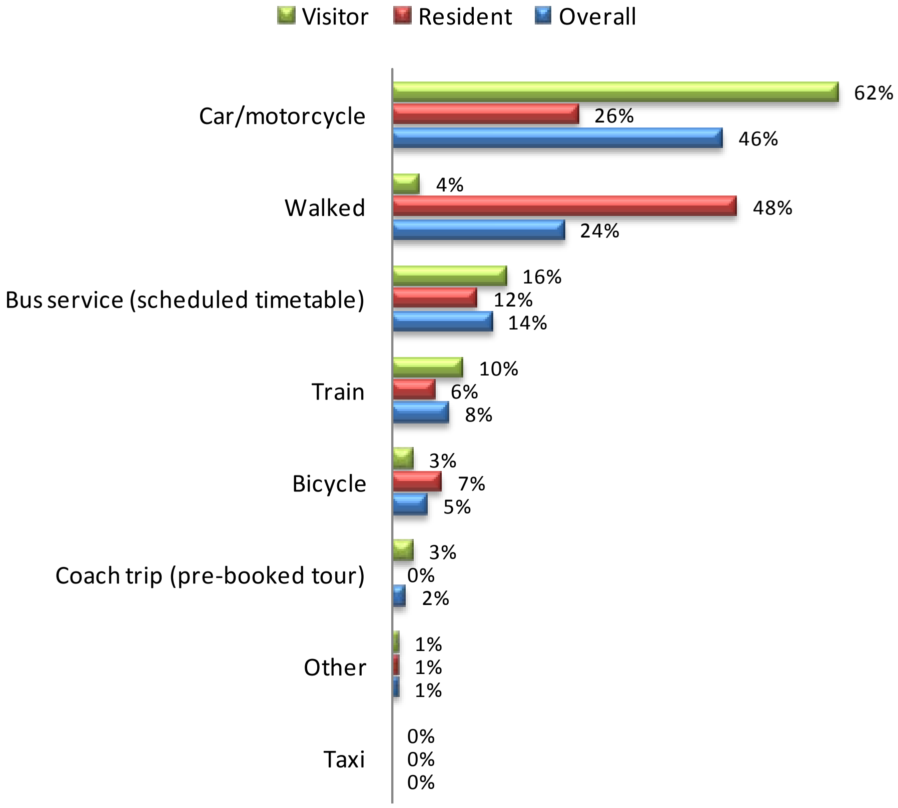
Figure 26: Type of accommodation used



Main mode of transport used to travel

5.2.6 The car is the most common mode of transport used to reach the city among visitors (62% of visitors travel by car). Residents are more likely to walk from their home in the city to the city centre (48% of residents walk), though a quarter travel to the city centre by car.

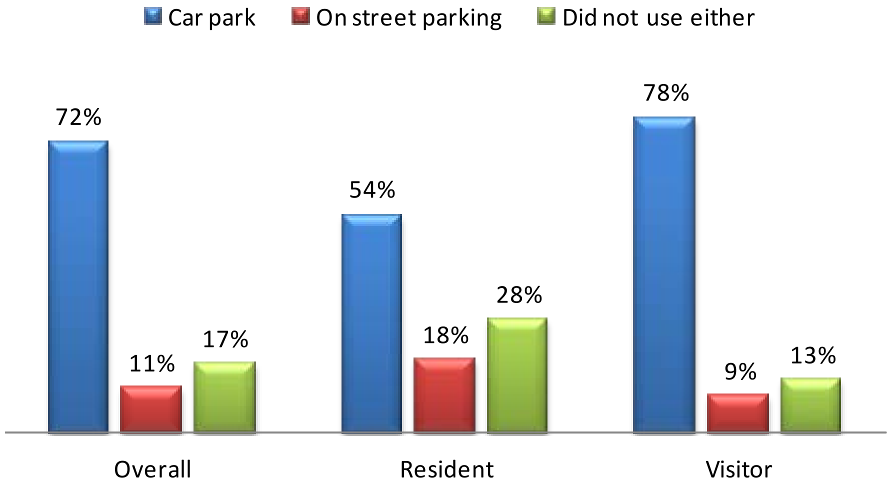
Figure 27: Type of accommodation used



Use of car parks

5.2.7 Three quarters of all visitors and just over a half of all residents who travelled by car used one of the city centre car parks during their visit.

Figure 28: Use of city parking



5.2.8 A wide range of city centre car parks were used, however, the two used most commonly used were Northgate and Cattle Market.

Table 25: City car parking used

	Overall	Resident	Visitor
Base	288	55	233
Northgate	26%	22%	27%
Cattle Market	23%	31%	21%
Avenue De Chartres	13%	13%	12%
Can't recall	8%	11%	8%
East Pallant/Cawley Priory	5%	4%	5%
New Park Road	4%	0%	5%
Little London	3%	4%	3%
Basin Road	3%	4%	3%
Baffins Lane	2%	2%	3%
Orchard Street	2%	2%	2%
St Cyriacs	2%	0%	3%
Market Road	2%	4%	2%
Westgate	2%	2%	3%
South Pallant	1%	4%	1%
Market Avenue/St John's Road	1%	0%	2%
Market Avenue/South Pallant	1%	0%	1%

Frequency of visits

5.2.9 As may be expected, frequency of visits to the city centre is relatively high among local residents with three quarters visiting the city centre every day.

5.2.10 Among visitors from outside the city, a fifth were found to be visiting the city centre for the first time.

Table 26: Frequency of visits

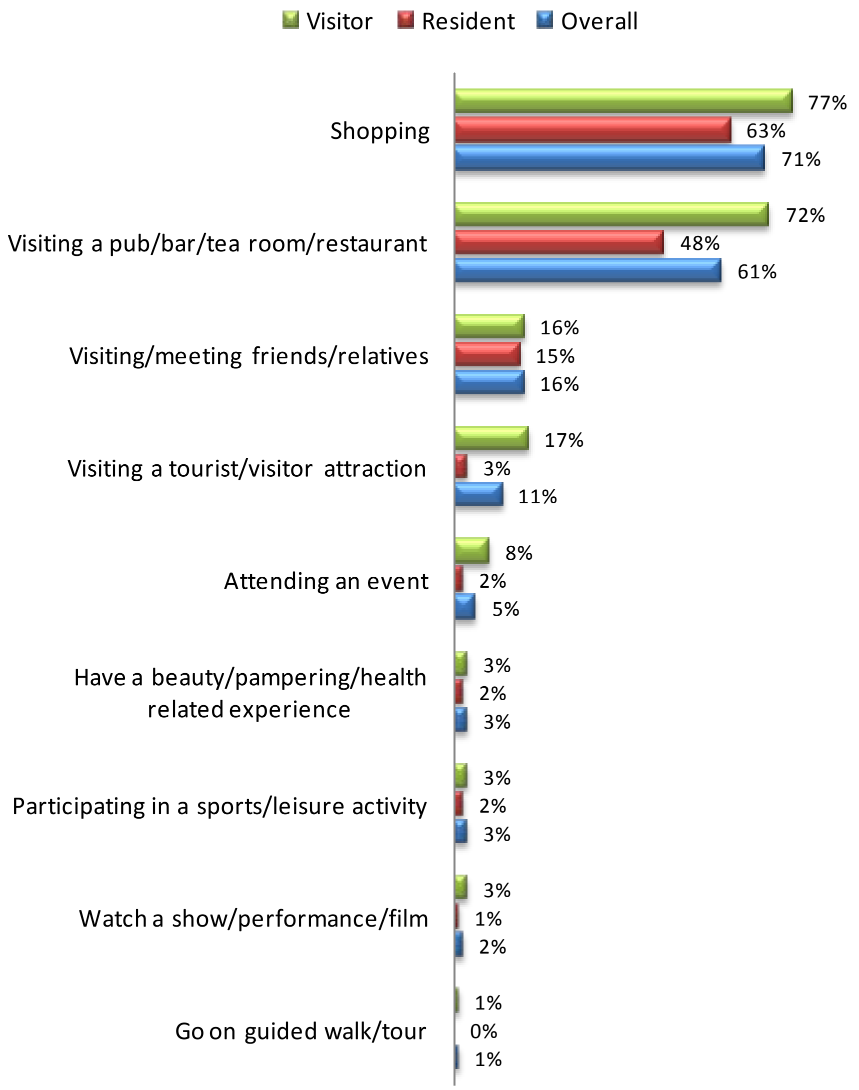
	Resident	Visitor
Base	403	486
Never, first visit	-	22%
At least once before	-	6%
2 to 4 times before	0%	10%
5 to 10 times before	0%	10%
Visit monthly	3%	19%
Visit weekly	18%	29%
Visit almost daily (live or work here)	77%	-
Last visit more than 12 months ago	0%	4%

Activities undertaken/plan to undertake

5.2.11 The most popular past time among visitors whilst visiting the city are shopping (undertaken by 77% of visitors) and visiting an establishment providing food and drink (71%). Both these two activities were also highly popular among residents.

5.2.12 Visiting a tourist attraction in the city was undertaken by 17% of visitors and only 3% of residents during their visit. A small proportion of visitors attended an event during their visit (8%, compared to 2% of residents).

Figure 29: Activities undertaken/planned to undertake



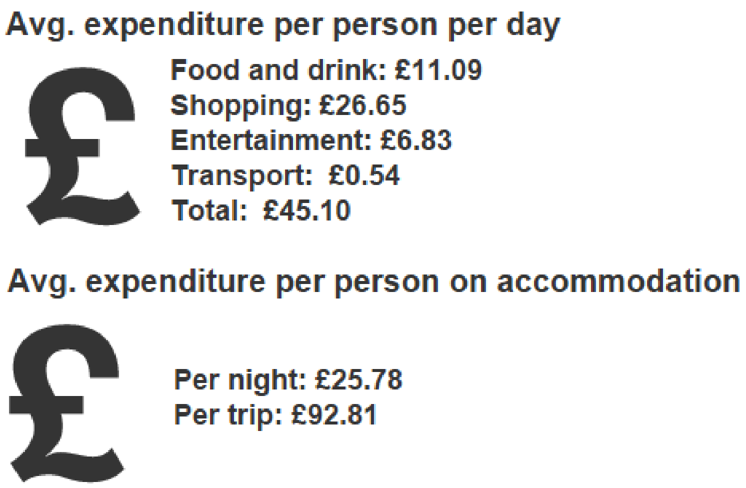
Average trip expenditure

5.2.13 On average, visitors from outside the city (excl. accommodation) spent £45.10 per day during their visit. The largest purchase area was shopping.

5.2.14 Visitors staying overnight in the city incurred an additional cost of £25.78 per night and £92.81 per trip on accommodation. With an average trip length of 3.9 nights, total average expenditure among overnight visitors per trip (incl. food and drink etc.) comes to £255.17.

5.2.15 It should be noted that these average expenditure figures per person per day are somewhat different to the Cambridge Model estimates for the district and are due to the differences in the methodology used to extract the figures.

Figure 30: Average trip expenditure



5.2.16 Comparable expenditure data from recent (2015) visitor surveys are available for two other historic cities. These are Bath and York. The total average expenditure per day per person is higher among Bath visitors but lower among York visitors.

5.2.17 Average expenditure on accommodation per night is much higher for both Bath and York.

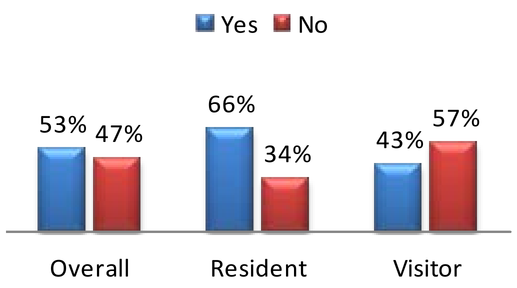
Table 27: Average visitor expenditure in other historic cities

	Avg. spend per day (all visitors and excl. Accommodation)	Avg. spend per person per night on accommodation
Bath	£57.81	£44.94
York	£34.69	£44.60

5.3 Evening economy

5.3.1 Two thirds of all residents and 43% of visitors from outside the city visit the city for leisure purposes in the evening.

Figure 31: Whether visit city centre in evening

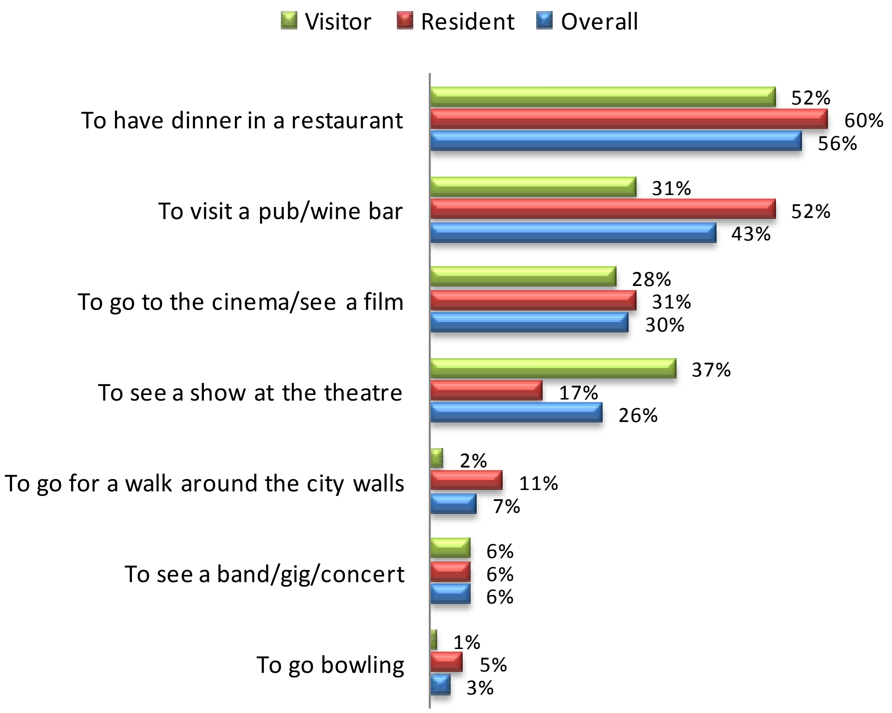


5.3.2 The main reason for visiting in the evening is to have a meal in one of the city's restaurants followed by visiting one of its pubs or wine bars.

5.3.3 Around a third of all visitors (residents and visitors from outside the city) also come to visit one of its two cinemas.

5.3.4 Visiting Festival Theatre is popular among visitors from outside the city; 37% come to watch a show/performance at the theatre in the evenings.

Figure 32: Reasons for visiting city centre in evening



5.3.5 The main reason residents gave for not visiting the city in the evening for leisure purposes was that they do not generally go out in the evenings. A number of visitors from outside the city also gave this reason and the response needs to be set against the relatively older age profile of visitors.

5.3.6 The main reason for not visiting the city in the evening provided by visitors was that the city was too far to travel for a night out. This is a response that will have come from day visitors. Around 1 in 10 visitors have not visited in the evening simply because they are unaware about what there is to do in the city in the evenings and a similar number are prevented from visiting because of a perceived lack of public transport to the city in the evening.

Table 28: Reasons for not visiting city centre in evening

	Overall	Resident	Visitor
Base	413	137	276
I don't tend to go out in the evening	41%	55%	35%
Too far, prefer to go out in the evening close to where I live	32%	11%	42%
Don't know much about what there is to do in the evening here	9%	4%	11%
There is a lack of public transport to travel to the city centre in the evening	8%	4%	9%
Prefer to go elsewhere for evening leisure/entertainment/socialising	6%	9%	5%
Does not have enough things to do and see in the evening	4%	7%	3%
I am worried about my personal safety (fear of crime)	4%	9%	2%
Does not have the range or quality of places to eat and drink I would like	2%	3%	1%
Place simply does not appeal to me for a visit in the evening	1%	2%	0%
Simply have not had time to visit in the evening	1%	1%	1%
Other	1%	2%	1%
Shops not open late	0%	1%	0%

5.4 Visitor perceptions

5.4.1 When residents and visitors were asked about the factors which were the most important in influencing them to visit the city centre that day, two thirds of residents provided responses not already listed on the questionnaire. The main response from residents to this question was that the trip to the city centre was influenced by the simple fact that they lived close by and visited the centre to conduct routine domestic activities.

5.4.2 Among visitors, the most important factor influencing the visit was the fact that they had visited previously and enjoyed the visit enough to want to visit again (selected by 44% of visitors). The most important factor influencing the decision to visit for just under a fifth of visitors was the presence of specific shops they like to visit and for another 10% of visitors it was the fact that their friends and relatives live in the city. ‘Other’ factors influencing the visit provided by visitors included the fact that the trip was simply part of the itinerary of the coach tour they were on, or that they were in the area on business, or taking part in a sporting event.

Important factors influencing decision to visit

Table 29: Factor most important in influencing decision to visit

	Overall	Resident	Visitor
Base	889	403	486
Other influences to be specified	40%	69%	10%
Visited before and wanted to come back	27%	10%	44%
City has specific type of shops I like to visit	16%	13%	18%
Friends/family live here and visiting them	8%	6%	10%
Visiting an attraction/number of attractions	5%	1%	8%
Visiting to attend a specific event	3%	0%	5%
Recommended by friend/relative/colleague/others	2%	0%	4%
Passing through having visited a nearby attraction, town or event	1%	0%	2%

Best things about the city

5.4.3 As with the question posed to city businesses, residents and visitors were asked about the best and worst things about the city.

5.4.4 A range of factors were mentioned by visitors when they were asked to comment on the best things about the city. The factors mentioned the most often are listed in the table below and a full list can be found in the Appendices.

5.4.5 The best thing about the city centre mentioned most often was its shopping offer (mentioned by 37% of visitors overall (both residents and visitors from outside the city).

Table 30: Top 10 best things about city

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Compactness of city centre – easy to get from one side to another	8%

Note results above are combined responses from both residents and visitors from outside the city

Worst things about the city

5.4.6 A relatively large number of visitors surveyed (residents and visitors from outside the city) did not have any negative comments to make about the city; overall 41% did not provide a response when asked to list the worst things about the city.

5.4.7 Among those who did provide a response, the worst things about the city are parking charges (mentioned by a fifth of all visitors) followed by traffic in the city (mentioned by 16% of all visitors). A full list of responses can be found in the Appendices.

Table 31: Top 10 worst things about the city

Parking availability and charges	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive place to live and visit	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27 – getting here is difficult	5%

Note results above are combined responses from both residents and visitors from outside the city

Aspects most strongly associated with Chichester

5.4.8 When visitors were asked about what they most strongly associated with the city, the response provided by the vast majority of residents and visitors was the Cathedral. Eight out of 10 visitors thought of the Cathedral when they thought of Chichester.

5.4.9 Shopping, Festival Theatre, Goodwood, the heritage of the city, its historical buildings, and its parks and open spaces are other aspects a significant proportion of residents and visitors associated with the city.

Table 32: Aspects most strongly associated with Chichester

	Overall	Resident	Visitor
Base	889	403	486
The Cathedral	83%	84%	82%
Shopping	39%	34%	43%
Theatre	37%	39%	36%
Goodwood	36%	45%	29%
Heritage/History	34%	34%	34%
Parks & Open Spaces/Gardens	27%	34%	21%
Arts & Culture	17%	21%	14%
The street markets	16%	18%	14%
The University	15%	19%	11%
Events	5%	5%	4%
Nightlife	4%	4%	4%
Outdoor sports	2%	3%	1%
Other associations to be specified	1%	1%	1%
Warmth of welcome	0%	0%	0%
Ease of access/strong transport links connectivity	0%	0%	0%

Visitor rating on vibrancy scale

5.4.10 When residents and visitors were asked to rate the ‘vibrancy’ of the city on a scale of 1 to 5 where 1 depicts the city as being ‘Behind the times/old fashioned’ and 5 depicts the city as ‘vibrant and cosmopolitan’, most went for an middle ‘average’ rating. The scores are broadly similar to that provided by city businesses.

5.4.11 Residents provided an average score of 3.0 out of 5 and visitors provided an average rating of 3.3 out of 5.

Figure 33: Visitor rating on vibrancy

5.5 Visitor satisfaction

Parking

5.5.1 Residents and visitors were found to be generally more satisfied with the ease of parking than the cost of parking. The latter received relatively average scores.

Table 33: Satisfaction rating on ease of parking

	Resident	Visitor
Avg. score out of 5	4.5	4.6
Very difficult	3%	1%
Quite difficult	3%	4%
Neither particularly difficult or easy	4%	2%
Quite easy	22%	24%
Very easy	68%	69%

Table 34: Satisfaction rating on cost of parking

	Resident	Visitor
Avg. score out of 5	3.1	3.7
Very expensive	15%	3%
Quite expensive	12%	10%
About average	31%	25%
Reasonable	31%	40%
Very reasonable	12%	22%

Accommodation

5.5.2 Among visitors staying overnight in commercial accommodation in the city, the majority described the range, quality and value for money of accommodation as 'Very good'.

Table 35: Satisfaction rating on accommodation

	Quality of service	Value for money
Base	27	27
Mean	4.4	4.4
Very poor	-	-
Poor	-	-
Average	15%	15%
Good	26%	26%
Very good	59%	59%

Visitor attractions & other places to visit

5.5.3 Satisfaction with visitor attractions and other places to visit was generally higher among visitors than residents. Visitors gave the range, quality and value for money of places to visit average scores of 4 out of 5. Residents scored the quality of service found at attractions at a similar level as visitors, but range and value for money fell a little below this.

Table 36: Satisfaction rating on attractions and other places to visit - residents

Residents	Range	Quality of service	Value for money
Base	331	331	331
Mean	3.9	4.2	3.8
Very poor	1%	1%	1%
Poor	5%	1%	7%
Average	22%	15%	27%
Good	41%	44%	38%
Very good	30%	38%	27%

Table 37: Satisfaction rating on attractions and other places to visit - visitors

Visitors	Range	Quality of service	Value for money
Base	369	369	369
Mean	4.2	4.4	4.2
Very poor	0%	0%	0%
Poor	2%	1%	2%
Average	15%	10%	17%
Good	44%	39%	41%
Very good	38%	50%	40%

Places to Eat & Drink

5.5.4 The mean average scores were generally high among both residents and visitors for places to eat and drink in the city. Residents and visitors where satisfied the most with the range of places to eat and drink; 73% of residents and 70% of visitors rated the range of places to eat and drink as ‘Very Good’.

Table 38: Satisfaction rating on places to eat and drink - residents

Resident	Range	Quality of service	Value for money
Base	369	369	369
Mean	4.6	4.4	4.0
Very poor	1%	1%	2%
Poor	2%	0%	4%
Average	5%	13%	22%
Good	19%	34%	37%
Very good	73%	53%	35%

Table 39: Satisfaction rating on places to eat and drink - visitors

Visitor	Range	Quality of service	Value for money
Base	426	403	406
Mean	4.6	4.5	4.3
Very poor	0%	0%	0%
Poor	1%	0%	2%
Average	6%	7%	15%
Good	24%	34%	37%
Very good	70%	59%	47%

Shops

5.5.5 Higher satisfaction scores on range, quality of shopping environment, and quality of service were provided by visitors than residents. A higher proportion of residents scored these three measures of shopping in the city as ‘Average’. Overall, however, satisfaction was either ‘Good’ or ‘Very good’ among both residents and visitors.

Table 40: Satisfaction rating on shops - residents

Resident	Range	Quality of shopping environment	Quality of service
Base	396	396	396
Mean	3.9	4.2	4.2
Very poor	2%	1%	1%
Poor	8%	2%	1%
Average	23%	13%	15%
Good	34%	41%	42%
Very good	33%	43%	41%

Table 41: Satisfaction rating on shops - visitors

Visitor	Range	Quality of shopping environment	Quality of service
Base	456	456	456
Mean	4.4	4.5	4.5
Very poor	0%	0%	0%
Poor	2%	1%	1%
Average	11%	5%	4%
Good	34%	36%	39%
Very good	53%	57%	56%

Ease of finding way around

5.5.6 Resident's and visitor's satisfaction ratings on road and pedestrian signage were broadly similar – with most providing scores of 4 and over.

Table 42: Satisfaction rating on ease of finding one's way around - residence

Resident	Road signs	Pedestrian signs	Display maps and information boards
Base	320	320	320
Mean	4.3	4.3	4.3
Very poor	0%	2%	2%
Poor	6%	3%	5%
Average	13%	14%	12%
Good	23%	26%	25%
Very good	59%	56%	57%

Table 43: Satisfaction rating on ease of finding one's way around - visitors

Visitor	Road signs	Pedestrian signs	Display maps and information boards
Base	389	389	389
Mean	4.5	4.5	4.4
Very poor	1%	1%	1%
Poor	2%	1%	2%
Average	7%	9%	9%
Good	28%	28%	30%
Very good	62%	61%	58%

Public toilets

5.5.7 Among residents 62% rated the cleanliness of the public toilets as 'Good' or 'Very good' compared with 53% who said the same for the availability.

5.5.8 Three quarters of visitors rated the cleanliness of the public toilets as 'Good' or 'Very good' and 65% rated the availability of public toilets in the city as 'Good' or 'Very good'.

Table 44: Satisfaction rating on public toilets - residents

Resident	Availability	Cleanliness
Base	316	316
Mean	3.6	3.8
Very poor	7%	5%
Poor	13%	10%
Average	27%	23%
Good	24%	30%
Very good	29%	32%

Table 45: Satisfaction rating on public toilets - visitors

Visitor	Availability	Cleanliness
Base	302	302
Mean	3.8	4.1
Very poor	5%	2%
Poor	11%	5%
Average	18%	16%
Good	29%	34%
Very good	36%	43%

Cleanliness of streets

5.5.9 Satisfaction with cleanliness of the streets and upkeep of parks and open spaces was found to be high among both residents and visitors; 88% of residents and 84% of visitors rated the cleanliness of the streets as 'Good' or 'Very good' and 96% of residents and 98% of visitors rated the upkeep of parks and open spaces as 'Good' or 'Very good'.

Table 46: Satisfaction rating on cleanliness of streets - residents

Resident	Cleanliness of streets	Upkeep of parks and open spaces
Base	397	397
Mean	4.4	4.7
Very poor	1%	0%
Poor	1%	0%
Average	9%	3%
Good	37%	24%
Very good	51%	72%

Table 47: Satisfaction rating on cleanliness of streets - visitors

Visitor	Cleanliness of streets	Upkeep of parks and open spaces
Base	476	476
Mean	4.5	4.7
Very poor	1%	0%
Poor	1%	1%
Average	5%	1%
Good	38%	29%
Very good	55%	69%

Nightlife/evening entertainment

5.5.10 Whilst a significant number of residents and visitors had no experience of evening entertainment/nightlife in the city, among those who did, satisfaction was generally lower than many of the other aspects of performance rated.

5.5.11 A significant proportion of residents and visitors provided poor or average scores. Residents in general provided lower scores than visitors. For example, 35% of residents rated the range of evening entertainment as 'Poor; or 'Very poor', compared to 14% of visitors. That said, a significant proportion of both residents and visitors thought the range, quality of service and value for money for nightlife in the city were either ‘Good’ or ‘Very good’.

Table 48: Satisfaction rating on evening entertainment - residents

Resident	Range	Quality of service	Value for money
Base	237	237	237
Mean	3.1	3.7	3.5
Very poor	12%	4%	5%
Poor	23%	7%	13%
Average	25%	27%	28%
Good	25%	40%	38%
Very good	15%	21%	17%

Table 49: Satisfaction rating on evening entertainment - visitors

Visitor	Range	Quality of service	Value for money
Base	164	164	164
Mean	3.7	4.1	3.9
Very poor	4%	2%	1%
Poor	10%	3%	7%
Average	23%	11%	23%
Good	38%	49%	39%
Very good	26%	35%	30%

Overall impression of the City

5.5.12 Satisfaction with the general atmosphere of the city was high among both residents and visitors; 92% of residents and 96% of visitors rated this aspect as either ‘Good’ or ‘Very good’.

5.5.13 Satisfaction on feeling of welcome was also high; 88% of residents and 93% of visitors rated this aspect as either ‘Good’ or ‘Very good’.

Table 50: Satisfaction rating on overall impression and welcome- residents

Resident	General atmosphere	Feeling of welcome
Base	403	403
Mean	4.5	4.4
Very poor	0%	1%
Poor	1%	2%
Average	7%	9%
Good	35%	36%
Very good	57%	52%

Table 51: Satisfaction rating on overall impression and welcome- - visitors

Visitor	General atmosphere	Feeling of welcome
Base	486	486
Mean	4.6	4.6
Very poor	0%	0%
Poor	1%	1%
Average	4%	5%
Good	30%	28%

Very good	66%	65%

Overall trip enjoyment

Just over a quarter of residents and a fifth of visitors rated their overall trip enjoyment as ‘Average’. For others, the trip was enjoyable; 72% of residents and 80% of visitors rated overall enjoyment as either ‘High’ or ‘Very high’.

Table 52: Overall trip enjoyment

	Resident	Visitor
Base	403	486
Mean	4.0	4.1
Very low	0%	0%
Low	1%	0%
Average	28%	19%
High	45%	50%
Very high	27%	30%

72% of residents report that overall enjoyment was high or very high

80% of visitors report that overall enjoyment was high or very high

6 Key findings and recommendations

6.1 Introduction

6.1.1 The findings of this research portray a positive picture of tourism in the Chichester District but have identified some specific areas for improvement in order to increase the volume and value of tourism. These are highlighted in blue in this section.

6.2 Value of tourism in the local economy

6.2.1 There are 455 businesses in the Chichester District directly involved in tourism. These are either accommodation providers (401 in total) or attractions/ places to visit/ activity providers (54 in total). Tourism-based businesses therefore represent 7.2% of all businesses in the Chichester District. Together these businesses generated an estimated revenue of £414.4 million in 2015 and supported an estimated 5810 FTE jobs. Taking into account the part-time and/or seasonal nature of many jobs within this industry sector, this rises to 8037 total jobs.

6.2.2 Tourism businesses and accommodation are spread across the District due to the presence of some major attractions away from the city of Chichester, notably Goodwood, Marwell Zoo, National Trust properties, Fishbourne Roman Villa and Arundel Castle plus the attraction of the coastline – together these help to distribute the industry and employment across the District.

6.2.3 Inevitably, there is a concentration in the city of Chichester: 77 accommodation businesses and 17 visitor attractions are located in the City/PO19 area. The four main city centre based attractions are Chichester Cathedral, Festival Theatre, Pallant House, and The Novium. These four attractions account for 212.4 FTE jobs and generate £15.7 million annually for businesses across the City, District and the wider region. Whilst these are significant sums brought into the area by these four attractions, these represent only 3.7% and 3.8% respectively of the total jobs and revenue.

6.3 Bedspace available

6.3.1 Bedspace capacity is potentially one of the key constraining factors on the District's ability to increase revenue from tourism. The 401 accommodation businesses provide almost 19000 bedspaces but 75% of this is in caravan/camping and chalet sites making this primarily a seasonal provision. In addition, this is concentrated in the PO20 area.

6.3.2 A further 1262 self-catering bedspaces (7% of the total) are available through holiday lets and self-catering apartments.

6.3.3 Serviced accommodation accounts for 16% of the total accommodation available which equates to 3060 bedspaces. 53% of serviced bedspace is located within the city/PO19 area.

Recommended action: A seasonal occupancy survey is recommended to identify if this constrains the tourism market at certain times of the year. A web visitor survey is recommended to determine whether overnight visitors found the type of accommodation they required.

6.4 Volume and value of tourism in Chichester District

6.4.1 An estimated 6.3 million visits were made to this area in 2015 comprising:

- 5.7 million day visits with visitor expenditure estimated at £189.2 million
- 477.7 thousand domestic overnight visits with visitor expenditure estimated at £76.1 million
- 123.4 thousand overseas overnight visits with visitor expenditure estimated at £56.2 million.

6.4.2 This puts Chichester on a par with Canterbury in terms of visit profile and volume.

6.4.3 Looking at average spend per trip, this shows that Chichester outperforms Canterbury by approximately 8%. In addition, compared to the South East region, Chichester surpasses the Regional average spend in all trip types, as detailed overleaf (Table 53).

Comparison of Average Visitor Spend in Chichester vs. South East Region

	Chichester District Visitors	All South East Region Visitors	Comparison Chichester District vs. South East
Domestic overnight visitors	£170.05	£150.82	+12.7%
Overseas overnight visitors	£455.20	£436.10	+4.4%
Day visitors	£33.45	£31.00	+7.9%
Total visitors	£51.62	£48.32	+6.8%

6.5 Profile of visitors to the city of Chichester

6.5.1 Visitors to Chichester are primarily from Sussex and Hampshire – together these accounted for three quarters of all visitors in the recent survey. Only 5% came from Surrey. Noteworthy is the very low proportion originating in London – 3%: this represents a real opportunity to increase visits from this densely populated area.

6.5.2 Visitors from overseas residents were scarce – estimated at 5% in 2015 and much smaller than other UK cities such as Bath (28%) York (15%).

Recommended action: A campaign to increase the number of overseas visitors is recommended especially as these are higher value visitors due to their above average spend per visit (see table 53 above).

Visitors from overseas may need more assistance than domestic visitors when planning a visit. To attract their attention, collaboration with a well-known attraction is recommended to promote the area. Goodwood events and Portsmouth Historic Docks/Marie Rose Museum are well known attractions with the potential to attract attention on the international stage. Suggested itineraries are recommended for inclusion on the Visit Chichester website to demonstrate ease of visiting, proximity to London and ease of travelling around. For example, single day and two day itineraries to include Chichester Cathedral and city centre together with one or two leading attractions are recommended. This would be in addition to the current itinerary planning function on the website.

6.5.3 Visitors tended to be older with almost 60% aged 55+ but only a third were retired; 65% were ABC1. A third visited alone with another third visiting with their spouse and 20% with their family. The average group size was 1.9. Primary reasons for visiting were for a leisure day out (33%) and for a special shopping trip (27%). 17% visited a tourist attraction in the city and 8% came for an event. 5% visited for a holiday or short break. The average day trip length was 3.4 hours and overnight trip was 3.9 nights.

6.5.4 Residents visiting the city are younger than visitors with less than a quarter retired. 44% are aged 25 – 54 and only 38% are 55+. Residents are slightly more up market: 70% are ABC1. Two thirds visit the city alone. The main reasons to visit the city centre are to do their regular domestic shopping or because they live, work or study in the city centre area.

6.5.5 Amongst visitors, frequency of visiting was high with 29% visiting weekly and another 29% visiting 5 + times a year. In addition, it is very positive to note the incidence of first time visitors at 20%. It is important to attract a balance of regulars and to supplement these with a pool of new visitors.

6.5.6 As may be expected, local residents are frequent visitors to the city centre: three quarters visit every day.

Recommended action: Data capture is to be encouraged by local businesses to maximise opportunities to communicate with visitors at a later date and to sell on line. Businesses could provide off peak/out of season offers to encourage new visitors to return.

6.6 Tourism business performance

6.6.1 Feedback from tourism businesses on trading levels from January to end of July 2016 compared to the same period last year, showed a fairly even divide between those experiencing an improvement, those reporting a decline and those who experienced no significant change. However, there were different responses from various sectors: within retail and serviced accommodation, more businesses reported a decline in trading whilst the most positive outcomes were reported by restaurants.

6.6.2 Looking ahead to the coming year, more businesses were positive than negative (33% vs. 20%) and again it was the restaurants who were the most positive. Positivity was driven as much by expectations of improvements to the weather as any other individual influence. But weather aside, positivity was said to be due to investment in the business plus attractions and events increasing visitor numbers.

6.6.3 When asked about factors affecting business performance, the cost of parking in the city was frequently cited and was also raised when asked about changes which would improve the performance of their business and the local economy. In addition, problems with traffic management and congestion (generally on the A27 and specifically due to roadworks) were raised as issues.

6.6.4 Other issues mentioned were the need to promote the destination more and to develop the night time economy.

6.7 Image amongst businesses (business survey)

6.7.1 There is a positive view of the city amongst businesses with many citing the heritage and historical architecture of the city as the best thing about the city. It is felt to be an attractive centre with a good ambience, a good range of shops and easy to get around.

6.7.2 On the negative side the image of the city is affected by heavy traffic congestion which many businesses felt deterred visitors from coming to the city. Once again the perceived high cost of parking and a view that the city lacked adequate parking provision was raised.

6.7.3 When asked about the vibrancy of the city, Chichester was not rated highly rated, achieving an average of 3.3 out of 5. This highlights an area for development, especially if Chichester is to compete for day trip and short break business originating from London and abroad.

Recommendation: ensure all businesses are represented by a photo on the Visit Chichester site to communicate visually the breadth of businesses available.

6.8 Image amongst visitors

6.8.1 Research was conducted amongst visitors and amongst residents of the area visiting the city.

6.8.2 Amongst visitors, the Cathedral is well known. Other associations are with the shopping, the Festival Theatre, and Goodwood. The heritage of the city and its historical buildings, plus its parks and open spaces are also associated with the city. These are frequently cited as the best things about the city along with the ambience of the city. The general atmosphere and feeling of welcome in the city were rated highly (both at 4.6 out of 5) by visitors.

6.8.3 The overall opinion of the city of Chichester was good with almost zero criticism. The average rating for overall enjoyment was 4.1 out of 5 amongst visitors and 4.0 amongst residents. Whilst a positive outcome, there is definite scope to improve the overall enjoyment levels. To offer some context as to what might be achievable, in 2014 the city of Bath received a rating of 4.63 out of 5 from visitors.

6.8.4 When asked about the worst things in the city, it is reassuring to note that over 40% did not respond. In line with the business survey, factors which were raised were car parking costs, traffic and also a decline in independent shops. The score attributed for the vibrancy of the city, in line with the view of businesses, was much lower than the overall enjoyment at 3.3 amongst visitors and 3.0 amongst residents reinforcing the need to address this.

Recommended action: Review the factors contributing to the atmosphere and vibrancy of the city in competing cities – Canterbury, Exeter and Bath are suggested - to identify elements which could be introduced in Chichester. Review the portrayal of the city on the Visit Chichester website, taking into account the short dwell times per page:

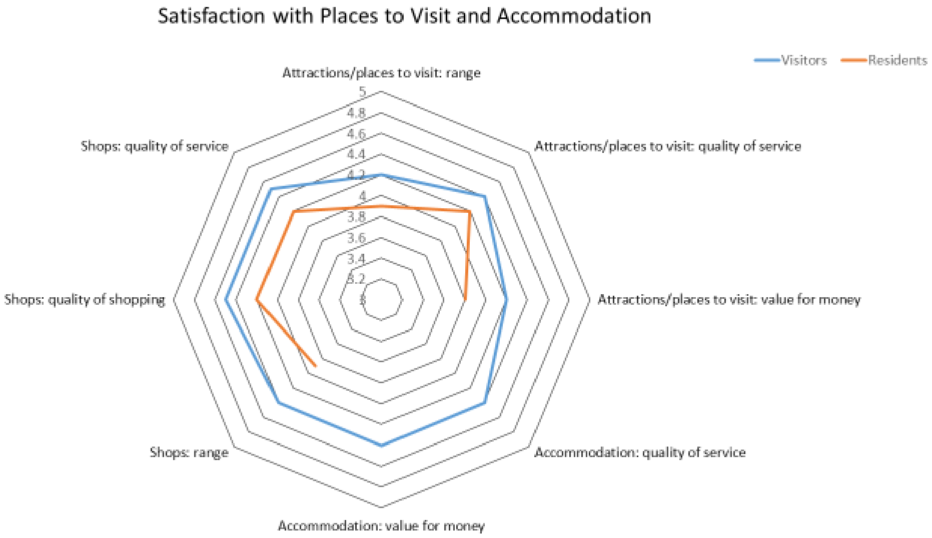
- *Shopping: the shopping pages feature little photography and do not communicate the range of shopping available. Ensure every shop displays a photo and use the web banner on this page to display a rolling series of atmospheric street and shopping photography.*
- *Identify strengths in the independent shopping offer - for example antiques or food specialists - and communicate these visually on the Visit Chichester website. Develop a themed shopping trail to communicate the range of independent shops. This might take in specialist farm shops outside of the city.*
- *Publicise a guided walk of the city to link key attractions plus recommendations for refreshments and dining.*
- *Make full use of photography on the navigational panels (City/Country/Coast coloured panel). Many pages feature this panel plus a map but little photography until the viewer scrolls down the page. Consequently, potential visitors may not see the motivational shots when browsing superficially.*

6.9 Visitor Satisfaction

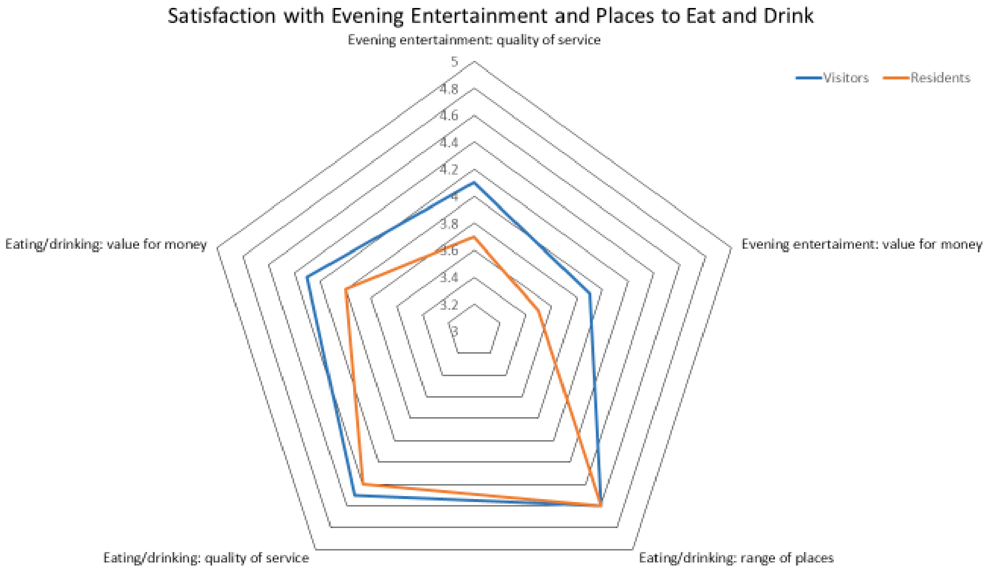
6.9.1 Analysis of satisfaction with the individual elements of the city is shown on the following spider diagrams. This identifies two main areas which have impacted on the overall satisfaction scores are the cost of parking and availability of public toilet facilities. Criticism of the cost of parking was raised as an issue in the business research. (It is worth noting that other dimensions exploring value for money have not attracted the same level of criticism as parking in the city.) Given the prevalence of the car as a mode of travel to Chichester, perceived cost of parking is an important issue.

Recommended action: There is multiple evidence that cost of car parking is an issue – real or not, it is a perception which would be advisable to address. Examine ways to allow businesses to be involved in this; for example – accommodation providers could offer a car parking voucher to give discount on parking or to offer the first two hours free; retailers could refund parking when customers spend over an agreed amount; parking charges could stop one hour earlier in the day to encourage early evening dining at the end of a day shopping. This would extend trip length and increase spend.

6.10 Places to visit – shops and attractions - and accommodation available all surpass the overall satisfaction scores amongst visitors and perform well in terms of quality and value.



6.11 Satisfaction ratings confirm visitors are happy with the range, quality and value of places to eat and drink but reveal less satisfaction with the service and value of evening entertainment choices.



6.12 The Evening economy

6.12.1 There is a thriving evening economy with two thirds of residents and 43% of visitors from outside the city visiting for leisure purposes in the evening, primarily to dine in a restaurant, pub or wine bar.

6.12.2 The theatre and cinema also attract residents and visitors into the city with the theatre being particularly successful at attracting visitors.

6.12.3 However, the satisfaction ratings given above suggest there is scope to improve the quality of service and value of evening entertainment.

Recommendation: include an evening events section on the Visit Chichester website and use to encourage visitors to stay into the evening. A date ordered events calendar would make browsing for activities simpler. Out of date activities need to be removed from the calendar. Calendarise the current What's On section making this easier to navigate by date.

Appendices

Table 53: UK counties of residence among domestic visitors

	486
Sussex	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%
Hertfordshire	1%
Dorset	1%
Essex	1%
Leicestershire	1%
Wiltshire	1%
Cheshire	0.4%
East Yorkshire	0.4%
Glamorgan	0.4%
Isle of Wight	0.4%
Lincolnshire	0.4%
Middlesex	0.4%
Bedfordshire	0.2%
Ceredigion	0.2%
County Armagh	0.2%
Cumberland	0.2%
Derbyshire	0.2%
Gloucestershire	0.2%
Kinross-Shire	0.2%
Norfolk	0.2%
Northamptonshire	0.2%
Northumberland	0.2%
Oxfordshire	0.2%
Ross-shire	0.2%
Somerset	0.2%
Suffolk	0.2%
Swansea	0.2%
West Yorkshire	0.2%
Grand Total	100.0%

Table 54: UK town/city of residence among domestic visitors

Chichester District – outside City (mainly PO18 and PO20)	19%
Bognor Regis	14%
Waterlooville	4%
Havant	3%
Emsworth	3%
Littlehampton	3%
London	3%
Portsmouth	3%
Worthing	3%
Midhurst	2%
Petersfield	2%
Southampton	2%
Fareham	2%
Southsea	2%
Pulborough	2%
Arundel	1%
Crawley	1%
Hayling Island	1%
Petworth	1%
Eastleigh	1%
Guildford	1%
Brighton	1%
Haslemere	1%
Hove	1%
Maidenhead	1%
Walsall	1%
Woking	1%
Aldershot	0.4%
Alton	0.4%
Burgess Hill	0.4%
Farnham	0.4%
Godalming	0.4%
Gosport	0.4%
High Wycombe	0.4%
Horsham	0.4%
Lee-on-the-solent	0.4%
Leicester	0.4%
Liss	0.4%
Shoreham-by-Sea	0.4%
Ashford	0.2%
Aylesbury	0.2%
Barnet	0.2%
Bath	0.2%
Beckenham	0.2%
Billingshurst	0.2%
Bracknell	0.2%

Bristol	0.2%
Broadstairs	0.2%
Bury	0.2%
Camberley	0.2%
Canterbury	0.2%
Cardiff	0.2%
Cardigan	0.2%
Chelmsford	0.2%
Chesham	0.2%
Coalville	0.2%
Craigavon	0.2%
Croydon	0.2%
Dingwall	0.2%
Enfield	0.2%
Epping	0.2%
Epsom	0.2%
Exmouth	0.2%
Farnborough	0.2%
Felixstowe	0.2%
Ferndown	0.2%
Gillingham	0.2%
Glossop	0.2%
Gravesend	0.2%
Haywards Heath	0.2%
Hexham	0.2%
Hindhead	0.2%
Holmfirth	0.2%
Honiton	0.2%
Hull	0.2%
Iver	0.2%
Kinross	0.2%
Lancing	0.2%
Liverpool	0.2%
Macclesfield	0.2%
Maesteg	0.2%
Manchester	0.2%
Melksham	0.2%
Millom	0.2%
Mitcham	0.2%
New Milton	0.2%
Newhaven	0.2%
North Ferriby	0.2%
Northampton	0.2%
Oldham	0.2%
Oxford	0.2%
Paignton	0.2%
Peacehaven	0.2%

Plymouth	0.2%
Polegate	0.2%
Radlett	0.2%
Reading	0.2%
Richmond	0.2%
Romsey	0.2%
Royal Tunbridge Wells	0.2%
Ryde	0.2%
Saint Albans	0.2%
Sale	0.2%
Salisbury	0.2%
Seaview	0.2%
Shefford	0.2%
Sleaford	0.2%
Spalding	0.2%
Steyning	0.2%
Stoke-on-trent	0.2%
Swansea	0.2%
Swindon	0.2%
Tadley	0.2%
Thetford	0.2%
Thornton Heath	0.2%
Watford	0.2%
West Malling	0.2%
West Molesey	0.2%
Wickford	0.2%
Wigan	0.2%
Wolverhampton	0.2%

Table 55: Overseas visitor country of residence

Base	20
Australia	40%
U.S.A.	20%
Germany	15%
Canada	5%
Rep. of Ireland	5%
Italy	5%
Netherlands	5%
New Zealand	5%

Table 56: Best things about the city

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Compactness/easy to get to one end to another	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Quietness	7%
Parks and gardens	7%
Cleanliness of the city	6%
Quaintness of the city	6%
Safety/feel safe from crime in the city	4%
Theatre	4%
Nice place to live	3%
Easy to get to the city	3%
Markets	2%
Plenty of parking	2%
Places to walk	2%
University	1%
Street entertainment	1%
Cinema	1%
Good public transport	1%
Close to sea	1%
Unspoilt/scenery/nature	1%
Lake/river/canal	1%
Novium	<1%
Good cycle lanes	<1%
Sports centre/Gym	<1%
Good rail link	<1%
Flowers	<1%
No beggars	<1%
Plenty of toilets	<1%
Peregrines	<1%
Beach	<1%
Butlins	<1%
Mini golf/putting	<1%
Fresh air	<1%
Child/family friendly	<1%
Seating	<1%

Table 57: Worst things about the city

Parking availability and costs	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27	5%
Not much to do	4%
Not enough for children/young people	3%
Lack of good pubs and restaurants	3%
Not enough public toilets	3%
Shops, cafes and pubs shut too early	3%
Not enough big name shops	3%
Lack of evening public transport	3%
Snobby/rude people	3%
Beggars/vagrants	2%
Youths hanging around	2%
Lack of signage	2%
Too many chain shops	2%
Litter	2%
Street markets	1%
Close streets to buses	1%
Train gates	1%
Too mnay modern buildings	1%
Old fashioned/dated/shabby	1%
No shade/shelter/seating	1%
Cyclists not using cycle paths/speeding	1%
Not enough bike racks	<1%
Unisex toilets	<1%
Lack of police presence	<1%
Flower boxes/parks need tidying	<1%
Sunday opening	<1%
No places for coaches to stop	<1%
Lack of cycle paths	<1%
Elderly population	<1%
Too touristy	<1%
No sports complex	<1%
Too many charity shops	<1%
Weather	<1%
Marina	<1%
Birds/mess	<1%
Noisy at night	<1%
Not wheelchair friendly	<1%

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TSE RESEARCH

Midhurst Visitor Survey

Report of findings

September 2016

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Contents

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This document has been formatted to allow for double-sided printing

1 Visitor survey

1.1 Introduction

1.1.1 This report presents the results of a visitor survey carried in Midhurst over July and August 2016. It was commissioned by Chichester District Council and undertaken by TSE research.

1.1.2 The overall purpose of the survey is to enhance the Council's understanding of the town's tourism market and provide the basis for tourism policies. In view of this, the survey sought to gather information on the profile of visitors, key features of their visit to the town, and how satisfied visitors were with their visit.

1.1.3 It is the intension that the data gathered by the survey will help guide decisions about visitor management, marketing and the development of visitor facilities.

1.2 Research objectives

1.2.1 The specific objectives of the visitor survey were as follows:

- To provide information on the origin, profile and behaviour of visitors to Midhurst to help improve understanding of tourism within the town.
- To identify areas of strength and weakness in Midhurst's tourism product.
- To identify the main reasons why visitors come to Midhurst, their opinions of specific facilities and services and their particular likes and dislikes – 'the visitor experience'.
- To specifically score visitor opinions on a range of factors which make up the 'visitor experience' as a means of focusing facility and service provision in the town.
- With the benefit of the above, allow more informed decisions to be made in relation to future visitor management, marketing initiatives and the enhancement of visitor facilities and services.

1.3 Research approach

1.3.1 In order to meet the above objectives, a street survey involving face-to-face interviews with a random sample of adult visitors was carried out by experienced TSE Research interviewers at selected locations within the town. In total, 300 adult visitors participated in the survey.

1.3.2 All sample surveys are subject to statistical error that varies with the sample size. Table 2 below shows the margins within which one can be 95% certain that the true figures will lie (based on the sample being randomly selected).

Table 1: Confidence limit

Result	Sample	299
10% or 90%	+/-	3.4
20% or 80%	+/-	4.5
30% or 70%	+/-	5.2
40% or 60%	+/-	5.6
50%	+/-	5.7

1.3.3 The figures are at the 95% confidence limit. This means, for example, that we can be 95% certain that, if 50% of visitors' surveyed are found to have a particular characteristic or view, there is an estimated 95% chance that the true population lies within the range of +/- 6.7% i.e. between 43.3% and 56.7 %. The margins of error shown above should be borne in mind when interpreting the results contained in this report.

1.4 Outline of report

1.4.1 Survey findings on the profile of visitors are presented in Chapter 2 of this report.

1.4.2 Survey findings on features of the trip (e.g. mode of travel, activities undertaken, trip expenditure) are presented in Chapter 3.

1.4.3 Visitor perceptions of the towns and satisfaction levels are presented in Chapter 4.

1.4.4 Where results are available and meaningful, they are split between day visitors and overnight visitors staying in Midhurst. Note that day visitors include both those visiting for the day from home and returning to their home on the same day and those visiting the town for the day as part of a day trip excursion whilst staying in holiday or other accommodation outside the town.

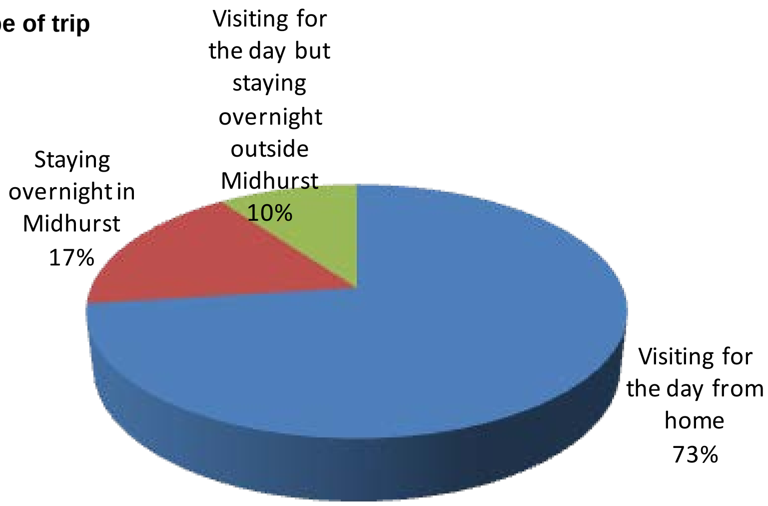
2 Visitor profile

2.1 Type of trip

2.1.1 The majority of visitors to Midhurst are day visitors. The survey found that 73% of visitors to Midhurst's were visiting for the day from home and a further 10% were visiting for the day whilst staying overnight outside the town.

2.1.2 Overall, 17% of visitors were staying overnight in the town.

Figure 1: Type of trip



2.2 Where visitors come from

2.2.1 The Midhurst visitor market is predominately domestic; 99% of visitors are from other parts of the UK and 88% of domestic visitors live in the South East.

2.2.2 The majority of domestic visitors come from other parts of West and East Sussex, Hampshire and Surrey (see Appendices for full list).

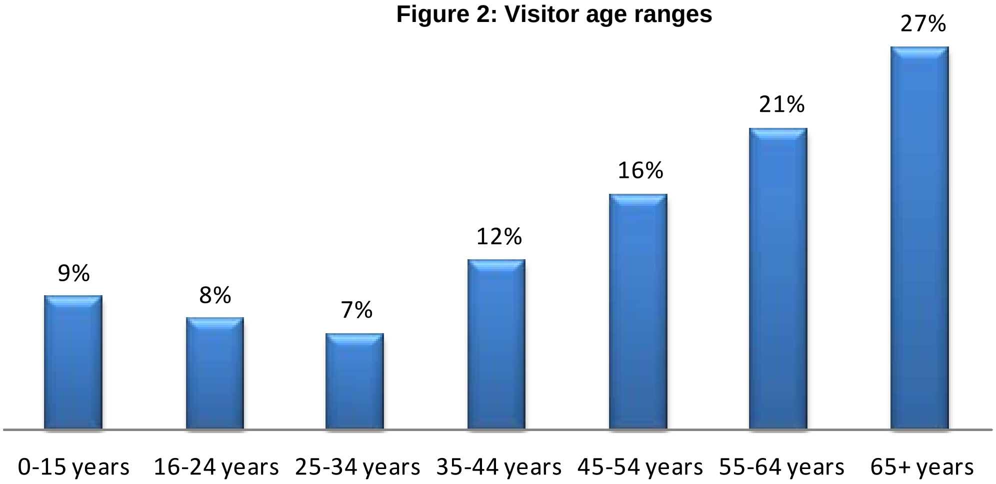
Table 2: Top 5 UK visitor county of residence

Sussex	30%
Hampshire	27%
Surrey	18%
Kent	5%
Berkshire	4%

2.3 Visitor age ranges

2.3.1 The age ranges of visitors show a leaning towards the older visitor; around a half (48%) are 55 years and over.

Figure 2: Visitor age ranges



2.3.2 Overall, a third of Midhurst visitors are retired.

Table 3: Whether retired

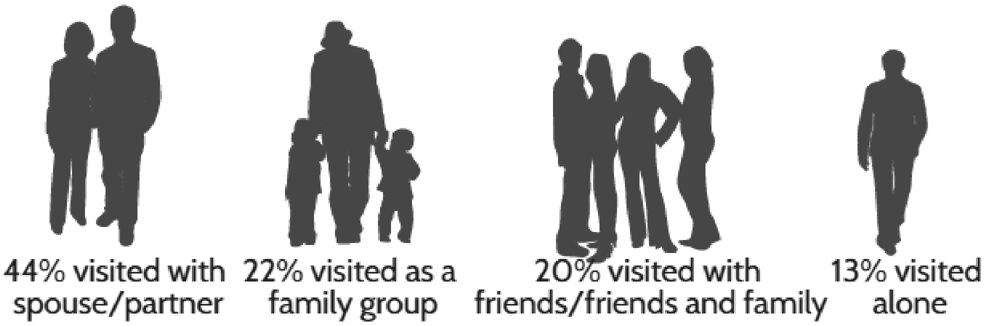
Yes	33%
No	67%

2.4 Visitor group size and composition

2.4.1 The average group size is 2.2 people.

2.4.2 The most common group composition among Midhurst visitors is a couple (44%). This was followed by families (22%) and groups made up of friends or friends and family (20%).

Figure 3: Group composition



2.4.3 There are differences between day and overnight visitors. Overnight visiting parties are far more likely to be couples and parties of friends than families.

Table 4: Group composition by visitor type

	Day visitor	Overnight visitor
Base	219	51
With family	39%	9%
With partner/spouse	34%	43%
With friends	10%	35%
By myself	9%	4%
With friends and family	8%	4%
Other	0%	4%

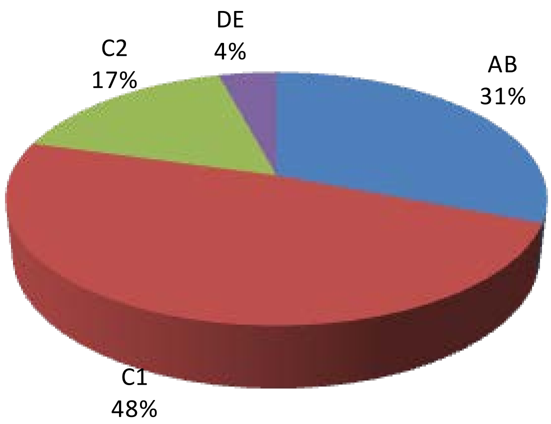
2.5 Visitor socio-economic status

2.5.1 A third of Midhurst's visitors are from AB occupational grade level households, although as has been already established a proportion of visitors are now retired. The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

2.5.2 The largest occupational grade represented by visitors is C1 (48%) - supervisory, clerical, and junior managerial and junior administrative occupations, and 17% are from the C2 occupational group (skilled manual works).

2.5.3 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income make up 4% of Midhurst's visitors.

Figure 4: visitor socio-economic status



3 Trip features

3.1 Main reason for visiting

3.1.1 The vast majority of overnight visitors were visiting friends or relatives living in the town (47%) and 39% were on holiday or a short break.

3.1.2 The vast majority of day visitors were also on a leisure based visit (87%).

Table 5: Main reason for visiting

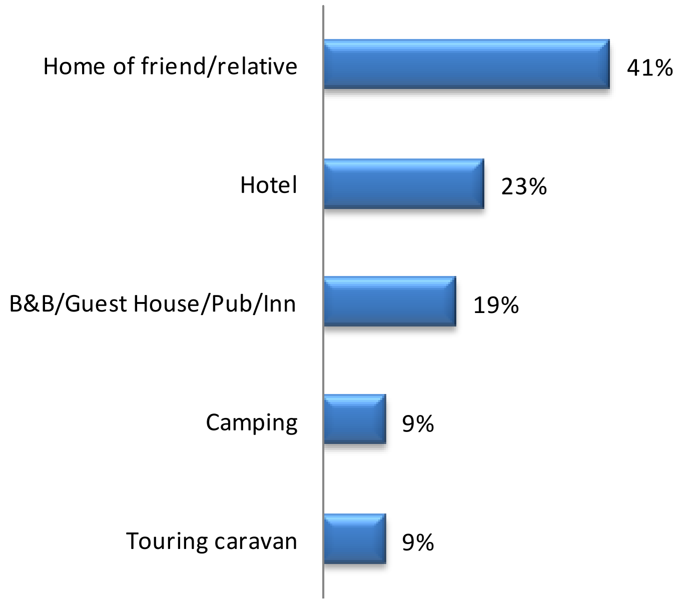
	Overall	Day visitor	Overnight visitor
Base	300	219	51
Leisure day trip	75%	87%	-
Visiting friends or relatives	9%	10%	47%
Shopping trip (special/non-regular)	8%	3%	9%
Business meeting	6%	1%	0%
Holiday/short break	1%	-	39%
Educational visit	1%	0%	4%

3.2 Accommodation used by overnight visitors

3.2.1 Given the relatively high proportion of overnight visitors found to be visiting friends and relatives, it may come as no surprise that a significant proportion of overnight visitors (41%) stayed in their homes.

3.2.2 Around a quarter stayed in a hotel and around a fifth stayed in smaller serviced establishments.

Figure 5: Type of accommodation used by overnight visitors



3.3 Average length of stay

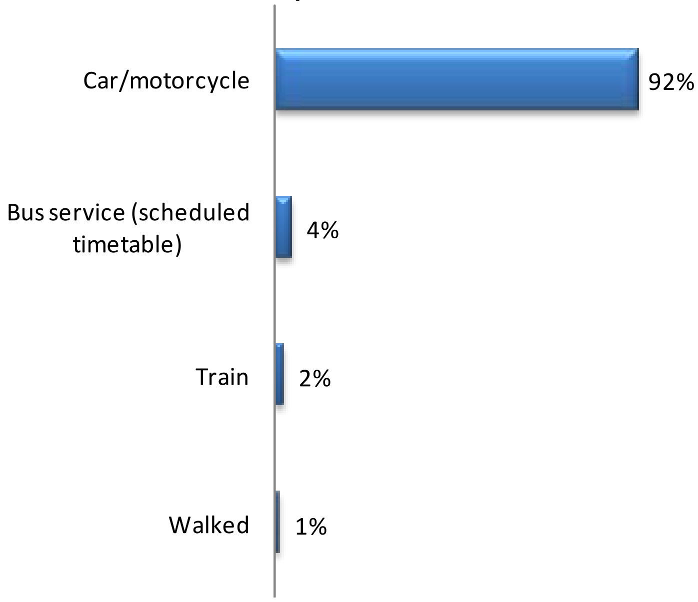
3.3.1 Day visitors spent on average 2.7 hours on their trip to Midhurst and overnight visitors spent on average 2.9 nights on their trip.

Figure 6: Average length of stay

3.4 Main mode of transport used

3.4.1 Nearly all visitors travelled to Midhurst by car. The visitor survey found that all but 6% of visitors used their car or other private motor vehicle to reach the town.

Figure 7: Main mode of transport used

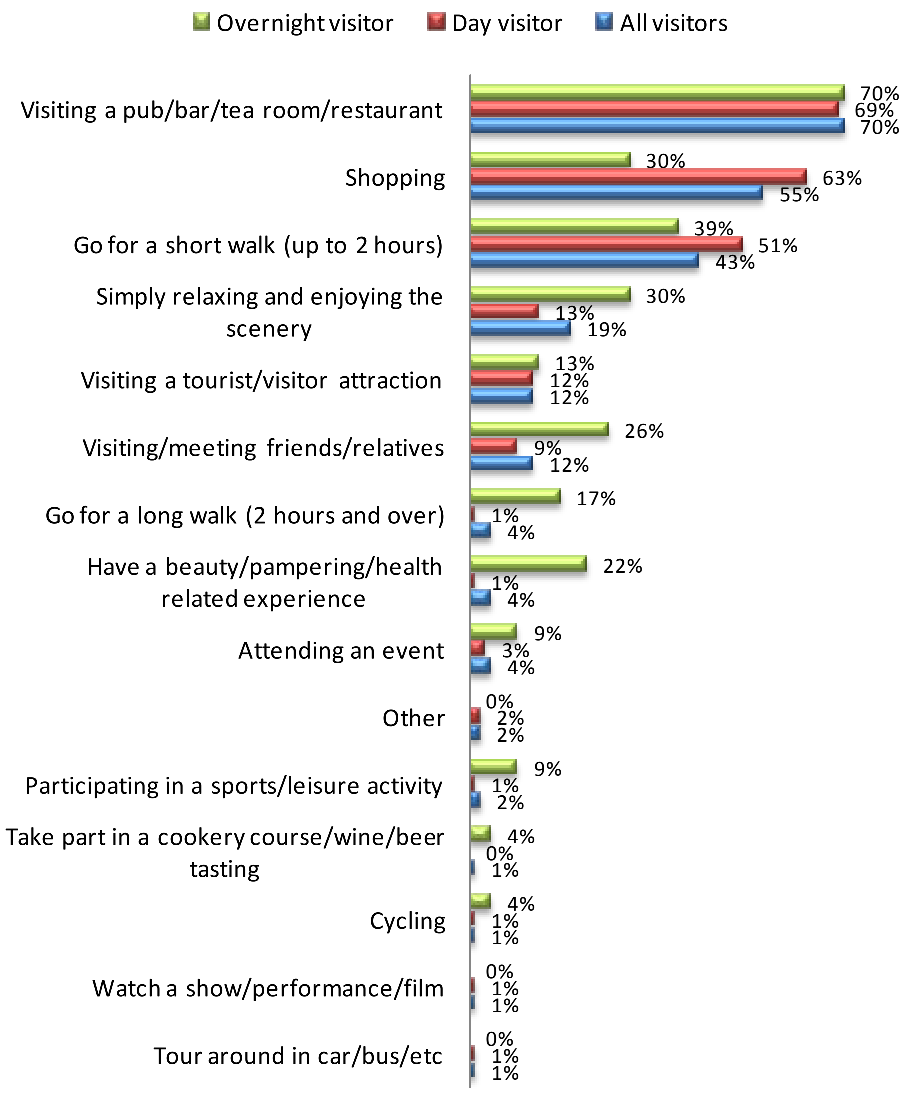


3.5 Activities undertaken / places of interest visited

3.5.1 The three most popular activities undertaken or planned to be undertaken by both day and overnight visitors were visiting somewhere for food and drink, shopping, and a walk of up to 2 hours.

3.5.2 For overnight visitors, simply relaxing and enjoying the scenery was also a popular past time during the visit (mentioned by a third of overnight visitors).

Figure 8: Activities undertaken

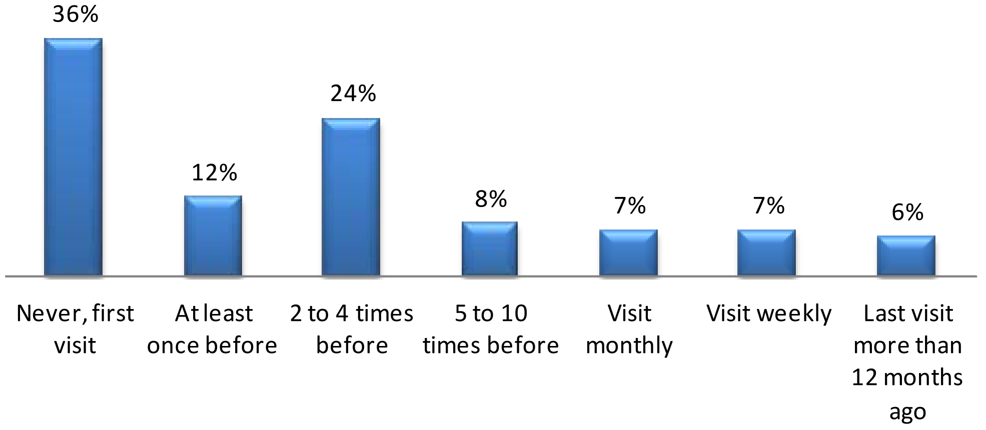


Note multiple responses permitted. Results do not sum to 100%

3.6 First time vs repeat visits

3.6.1 A third of visitors were visiting Midhurst for the first time (34%).

Figure 9: Frequency of visits



3.6.2 Frequency of previous visits was generally high with a quarter of day and overnight visitors having previously visited the town 2 to 4 times before.

Table 6: Frequency of visits

	Day visitor	Overnight visitor
	219	51
Never, first visit	31%	39%
At least once before	11%	13%
2 to 4 times before	23%	26%
5 to 10 times before	10%	4%
Visit monthly	7%	9%
Visit weekly	9%	4%
Last visit more than 12 months ago	8%	4%

3.7 Average trip expenditure

3.7.1 Midhurst visitor spent on average £18 per person per day on their visit on items such as food and drink and shopping.

3.7.2 Overnight visitors incurred an additional average spend per person per night of £20.39 on accommodation and £59.336 per person per trip (over entire duration of trip).

Table 7: Average expenditure per person by town

Base	300
Food and drink	£11.56
Shopping (e.g. buying gifts)	£5.38
Entertainment (e.g. entry fees)	£0.94
Transport (e.g. parking charges)	£0.12
Total avg spent per day per person	**£18.00**

Table 8: Average accommodation expenditure per person by town

Base	51
Accommodation per night per person	**£20.39**
Accommodation per trip per person	£59.36

4 Trip motivations and influences

4.1 Factors most important in influencing decision to visit

4.1.1 A wide range of factors were given when asked what was most important in influencing the decision to visit. Overall, a third of visitors gave the reason 'Visited before and wanted to come back', suggesting a high level of trip enjoyment with previous visits.

4.1.2 For around a fifth it was the opportunities for walking (19%), and for another fifth it was the ease of getting there from home (18%).

4.1.3 There were differences in the relative weight of the different factors mentioned between day and overnight visitors. For example, for overnight visitors, the opportunity to explore stunning countryside and escape into nature, and visit friends and relatives were more important influencing factors than they were for day visitors.

Table 9: Factors influencing decision to visit

	Overall	Day visitor	Overnight visitor
Base	300	219	51
Visited before and wanted to come back	34%	35%	13%
Great place for walking (range of trails/paths)	19%	13%	22%
The ease of getting here/excellent road and rail transport	18%	17%	13%
Opportunity to explore stunning countryside	16%	11%	30%
Interest in areas rich culture and heritage	12%	24%	0%
Quality shopping (availability of independent shops/boutiques)	12%	10%	9%
Friends/family live here and visiting them	10%	10%	26%
The tranquil environment/ability to escape into nature	10%	11%	22%
Range and quality of local food and drink	8%	8%	9%
Family friendly/great for families	6%	13%	4%
Simply passing through whilst visiting somewhere else	6%	11%	0%
Recommended by friend/relative/colleague/others	5%	8%	13%
Visiting an attraction/number of attractions	4%	3%	0%
Visiting to attend a specific event	2%	1%	4%
Range of quality accommodation	2%	0%	13%
Opportunity to explore stunning coastline	1%	4%	0%
Sheer variety of things to see and do	1%	4%	0%
Great place for cyclists (range of trails/cycle friendly)	1%	1%	0%
Nightlife and evening entertainment	1%	0%	4%
Range of affordable accommodation	1%	0%	4%

4.2 Best things about Midhurst

4.2.1 Key 'best things' about Midhurst from the perspective of visitors are its quaintness, its relatively unspoilt nature, the architecture of its buildings, and the view that the town has plenty of places to park.

Table 10: Best things about Midhurst

Quaintness	28%
Unspoilt/nature	25%
Architecture/buildings	21%
Plenty of parking	21%
Shopping	18%
Variety of places to eat and drink	15%
Quiet	9%
Ambience	9%
History/culture	8%
Friendly	6%
Parks and gardens	4%
Easy to get around	4%
Markets	3%
Clean	2%
Lots to do	2%

4.3 Worst things about Midhurst

4.3.1 Only a third of visitors mentioned negative factors and among these traffic congestion appears to be the main negative aspect encountered (mentioned as negative by 66% of visitors).

Table 11: Worst things about Midhurst

Traffic	66%
Decline in number of independent shops	23%
Lack of good pubs and restaurants	10%
Not enough big name shops	6%
Too many restaurants and cafes	4%
Lack of evening public transport	3%
Uneven pavements	1%
Expensive	1%
Youths at night	1%
Lack of signage	1%
Litter	1%

4.4 Aspects most strongly associated with Midhurst

4.4.1 Three quarters of all visitors associated Midhurst with the countryside and open space (72%).

4.4.2 The architectural heritage of the town with its mix of Tudor, Georgian and Victorian buildings is an aspect very much appreciated by its visitors and was the second frequently mentioned aspect visitors associated with the town (mentioned by 66% of visitors).

Table 12: Aspects most strongly located with Midhurst

Countryside and open spaces	72%
Heritage/historic buildings & architecture	66%
Walking	23%
Castle (ruins of St Anne's Castle)	13%
Fine local food and drink	13%
Nature and wildlife	13%
Warmth of welcome	10%
Outdoor sports	7%
Shopping	6%
Events	4%
Ease of access/strong transport links connectivity	4%
Water sports	3%
The street markets	1%
Arts & Culture	1%
Cycling (leisurely non-competitive)	1%

4.5 Visitor ratings on vibrancy of Midhurst

4.5.1 Visitors were asked to rate the vibrancy of Midhurst on a scale of 1 to 5 where 1 depicts the town as being 'Behind the times/old fashioned' and 5 depicts the town as 'vibrant and cosmopolitan'.

4.5.2 The overall average rating score for Midhurst was 2.6 out of 5, suggesting a relatively low vibrancy score. However, this needs to be set against the context that the town's old fashion nature is welcomed by visitors as part of its quaintness and charm.

4.6 Visitor satisfaction rates

4.6.1 The survey sought to obtain the opinions of visitors on a range of indicators which together comprise the 'visitor experience'. Each indicator was rated on a scale of one to five, where 1='Very poor' (or the most negative response) amd 5='Very good' (or the most positive response), allowing satisfaction scores' (out of 5) to be calculated. The results are presented in the following sections.

Accommodation

4.6.2 Among visitors staying overnight in commercial accommodation in Midhurst, the quality of accommodation was rated as either 'Good' or 'Very good' and gained a relatively high score of 4.5. However, the same proportion did not think they got value for money out of their accommodation and this aspect received an average satisfaction score of 3.8 out of 5.

Table 13: Satisfaction rating on accommodation

	Quality of service	Value for money
Mean	4.5	3.8
Very poor	0%	0%
Poor	0%	0%
Average	0%	40%
Good	50%	40%
Very good	50%	20%

Visitor attractions & other places to visit

4.6.3 Overall, around a half of all visitors rated the range, quality of service and value for money of places to eat and drink as 'Good'. A proportion of visitors felt that the range and value for money was 'Average.

Table 14: Satisfaction rating on attractions and other places to visit

	Range	Quality of service	Value for money
Mean	3.9	4.2	3.7
Very poor	0%	0%	0%
Poor	1%	0%	5%
Average	28%	13%	29%
Good	54%	52%	57%
Very good	17%	34%	9%

Places to Eat & Drink

4.6.4 The range and quality of places to eat and drink received average scores of 4.2 and 4.3 respectively, suggesting a relatively good level of satisfaction. The issue was once again with value for money, with a quarter of all visitors rating this aspect as 'Average'.

Table 15: Satisfaction rating on places to eat and drink

	Range	Quality of service	Value for money
Mean	4.2	4.3	3.9
Very poor	0%	0%	0%
Poor	6%	0%	2%
Average	13%	13%	26%
Good	36%	45%	50%
Very good	45%	43%	22%

Shops

4.6.5 The range and quality of the shopping environment received relatively average scores of 3.5 and 3.8 respectively. Quality of service was a little higher at 4.0 out of 5. Once again, a significant proportion rated these aspects as 'Average', particularly the range of shops.

Table 16: Satisfaction rating on shops

	Range	Quality of shopping environment	Quality of service
Mean	3.5	3.8	4.0
Very poor	2%	0%	0%
Poor	9%	5%	1%
Average	40%	30%	23%
Good	40%	48%	53%
Very good	9%	18%	22%

Ease of finding way around

4.6.6 Visitors gave road and pedestrian signage both an average score of 4.3 and 4.2 out of 5, respectively, indicating a relatively good level of satisfaction.

Table 17: Satisfaction rating on ease of finding one's way around

	Road signs	Pedestrian signs
Mean	4.3	4.2
Very poor	1%	0%
Poor	2%	2%
Average	6%	12%
Good	51%	53%
Very good	41%	33%

4.7 Overall trip enjoyment

4.7.1 Overall trip enjoyment was relatively high.

4.7.2 Over a half of all visitors described their overall trip enjoyment as 'High' and a third described it as 'Very high'.

Table 18: Overall trip enjoyment

Mean	4.2
Very low	0%
Low	0%
Average	11%
High	59%
Very high	30%

89% of visitors report that overall enjoyment was high or very high

5 Appendices

Table 19: Full list of UK visitor county of residence

Sussex	30%
Hampshire	27%
Surrey	18%
Kent	5%
Berkshire	4%
Middlesex	4%
Dorset	2%
London	2%
Hertfordshire	2%
Somerset	2%
Worcestershire	2%
Buckinghamshire	1%
Cheshire	1%
Cornwall	1%
Devon	1%
Leicestershire	1%
Staffordshire	1%
Total	100%

Table 20: UK visitor region of residence

South East	88%
South West	5%
Greater London	2%
West Midlands	2%
East of England	2%
East Midlands	1%
North West	1%
Total	100%

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TSE RESEARCH

Petworth Visitor Survey

Report of findings

September 2016

Prepared by:

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Contents

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1 Visitor survey

1.1 Introduction

1.1.1 This report presents the results of a visitor survey carried in Petworth over July and August 2016. It was commissioned by Chichester District Council and undertaken by TSE research.

1.1.2 The overall purpose of the survey is to enhance the Council's understanding of the town's tourism market and provide the basis for tourism policies. In view of this, the survey sought to gather information on the profile of visitors, key features of their visit to the town, and how satisfied visitors were with their visit.

1.1.3 It is the intension that the data gathered by the survey will help guide decisions about visitor management, marketing and the development of visitor facilities.

1.2 Research objectives

1.2.1 The specific objectives of the visitor survey were as follows:

- To provide information on the origin, profile and behaviour of visitors to Petworth to help improve understanding of tourism within the town.
- To identify areas of strength and weakness in Petworth's tourism product.
- To identify the main reasons why visitors come to Petworth, their opinions of specific facilities and services and their particular likes and dislikes – 'the visitor experience'.
- To specifically score visitor opinions on a range of factors which make up the 'visitor experience' as a means of focusing facility and service provision in the town.
- With the benefit of the above, allow more informed decisions to be made in relation to future visitor management, marketing initiatives and the enhancement of visitor facilities and services.

1.3 Research approach

1.3.1 In order to meet the above objectives, a street survey involving face-to-face interviews with a random sample of adult visitors was carried out by experienced TSE Research interviewers at selected locations within the town. In total, 175 adult visitors participated in the survey.

1.3.2 All sample surveys are subject to statistical error that varies with the sample size. Table 2 below shows the margins within which one can be 95% certain that the true figures will lie (based on the sample being randomly selected).

Table 1: Confidence limit

Result	Sample	299
10% or 90%	+/-	5.8
20% or 80%	+/-	7.7
30% or 70%	+/-	8.9
40% or 60%	+/-	9.5
50%	+/-	9.7

1.3.3 The figures are at the 95% confidence limit. This means, for example, that we can be 95% certain that, if 50% of visitors' surveyed are found to have a particular characteristic or view, there is an estimated 95% chance that the true population lies within the range of +/- 6.7% i.e. between 40.3% and 59.7 %. The margins of error shown above should be borne in mind when interpreting the results contained in this report.

1.4 Outline of report

1.4.1 Survey findings on the profile of visitors are presented in Chapter 2 of this report.

1.4.2 Survey findings on features of the trip (e.g. mode of travel, activities undertaken, trip expenditure) are presented in Chapter 3.

1.4.3 Visitor perceptions of the towns and satisfaction levels are presented in Chapter 4.

1.4.4 Where results are available and meaningful, they are split between day visitors and overnight visitors staying in Petworth. Note that day visitors include both those visiting for the day from home and returning to their home on the same day and those visiting the town for the day as part of a day trip excursion whilst staying in holiday or other accommodation outside the town.

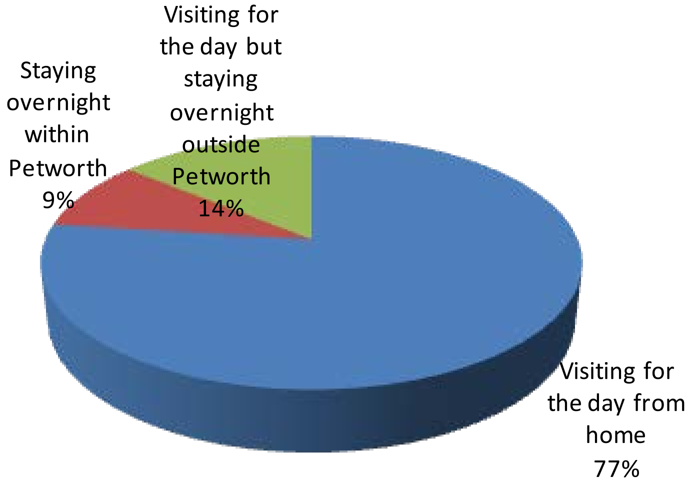
2 Visitor profile

2.1 Type of trip

2.1.1 The majority of visitors are day visitors. Three quarter of visitors to Petworth's were visiting for the day from home and a further 14% were visiting for the day whilst staying overnight outside the town.

2.1.2 Overall, only 9% of visitors were staying overnight in the town.

Figure 1: Type of trip



2.2 Where visitors come from

2.2.1 The Petworth visitor market is predominately domestic; 99% of visitors were from other parts of the UK and 76% of domestic visitors live in the South East.

2.2.2 The majority of domestic visitors come from other parts of West and East Sussex, Hampshire and Surrey (see Appendices for full list).

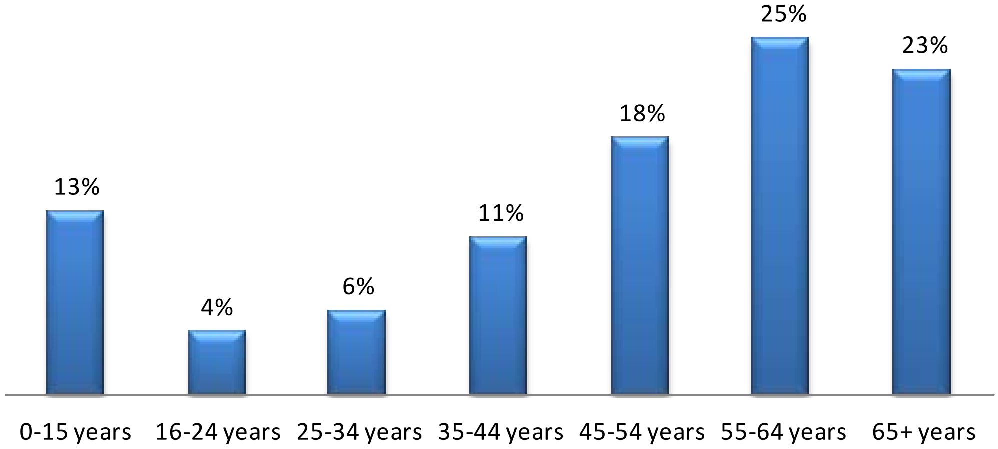
Table 2: Top 5 UK visitor county of residence

Surrey	23%
Sussex	23%
Hampshire	17%
London	6%
Kent	4%

2.3 Visitor age ranges

2.3.1 The age ranges of visitors show a leaning towards the older visitor; around a half (48%) were 55 years and over.

Figure 2: Visitor age ranges



2.3.2 Overall, a third of Petworth visitors were retired.

Table 3: Whether retired

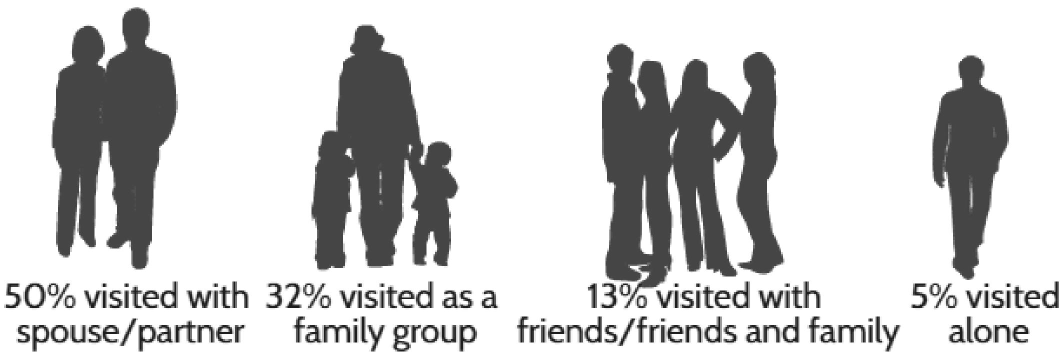
Yes	33%
No	63%

2.4 Visitor group size and composition

2.4.1 The average group size is 2.5 people.

2.4.2 The most common group composition among Petworth visitors is a couple (50%). This is followed by families (232%) and groups made up of friends or friends and family (13%).

Figure 3: Group composition



2.4.3 No significant difference in group composition was found between day and overnight visitors.

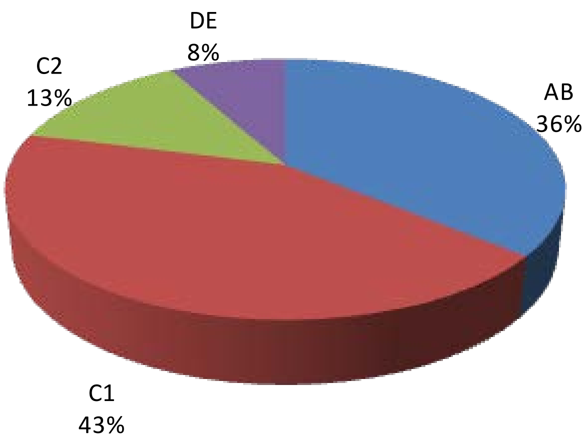
2.5 Visitor socio-economic status

2.5.1 A third of Petworth's visitors are from AB occupational grade level households, although as has been already established a proportion of visitors are now retired. The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

2.5.2 The largest occupational grade represented by visitors s C1 (43%) which represents supervisory, clerical, and junior managerial and junior administrative occupations, and 13% are from the C2 occupational group (skilled manual works).

2.5.3 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income made up 8% of Petworth's visitors.

Figure 4: visitor socio-economic status

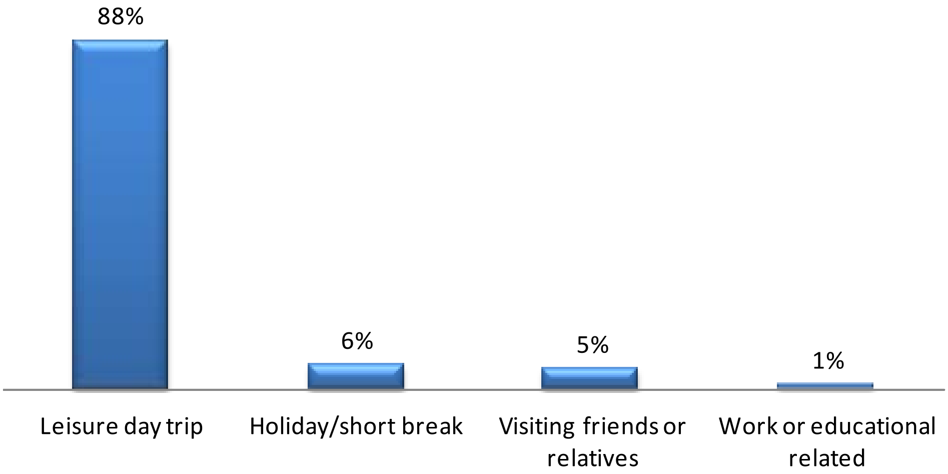


3 Trip features

3.1 Main reason for visiting

3.1.1 Given that the vast majority of visits are day visits, it is not surprising to find that overall, 88% of visitors described their visit as a leisure day trip.

Figure 5: Main reason for visiting



3.1.2 Results split between day and overnight visitors reveals that two thirds of overnight visitors were on holiday or a short break and a fifth were visiting friends and relatives in the town. Around 7% of day visitors were visiting for reasons other than a leisure day out.

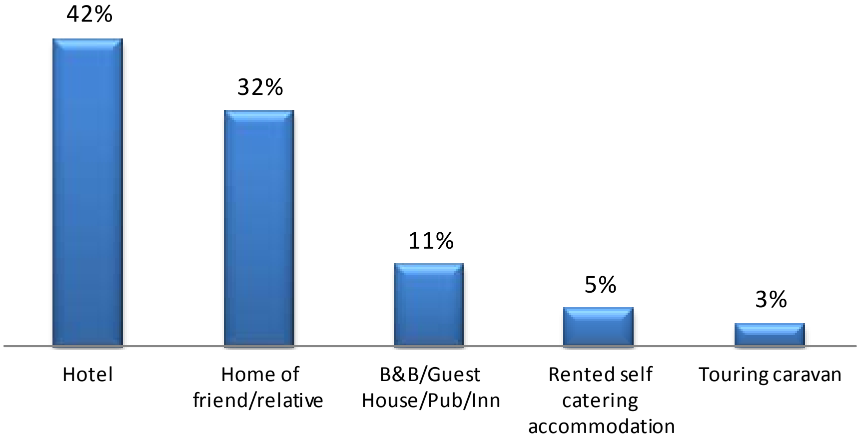
Table 4: Main reason for visiting by visitor type

	Day visitor	Overnight visitor
	135	16
Leisure day trip	93%	-
Holiday/short break	-	69%
Visiting friends or relatives	4%	19%
Work or educational related	0%	6%
Visiting an event	1%	0%
Shopping trip (special/non-regular)	2%	0%

3.2 Accommodation used by overnight visitors

3.2.1 The small proportion of visitors who stayed overnight in Petworth stayed mainly in a hotel (42%) or the home of friends and relatives (32%).

Figure 6: Type of accommodation used by overnight visitors



3.3 Average length of stay

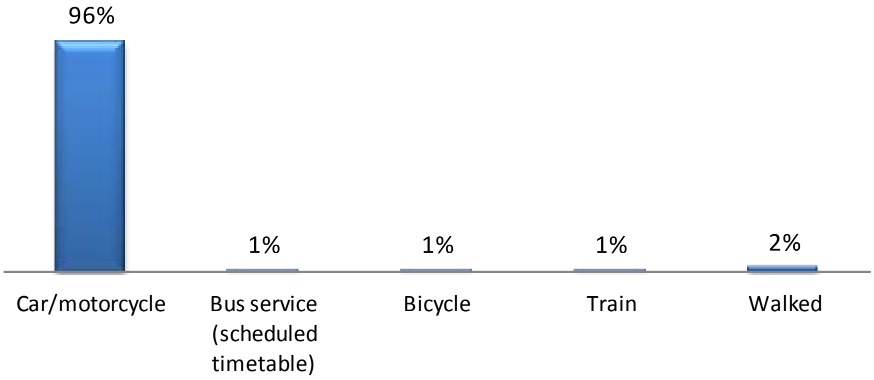
3.3.1 Day visitors spent on average 2.7 hours on their trip to Petworth and overnight visitors spent on average 4.3 nights on their trip.

Figure 7: Average length of stay

3.4 Main mode of transport used

3.4.1 Nearly all visitors travelled to Petworth by car. The visitor survey found that all but 4% of visitors used their car or other private motor vehicle to reach the town.

Figure 8: Main mode of transport used

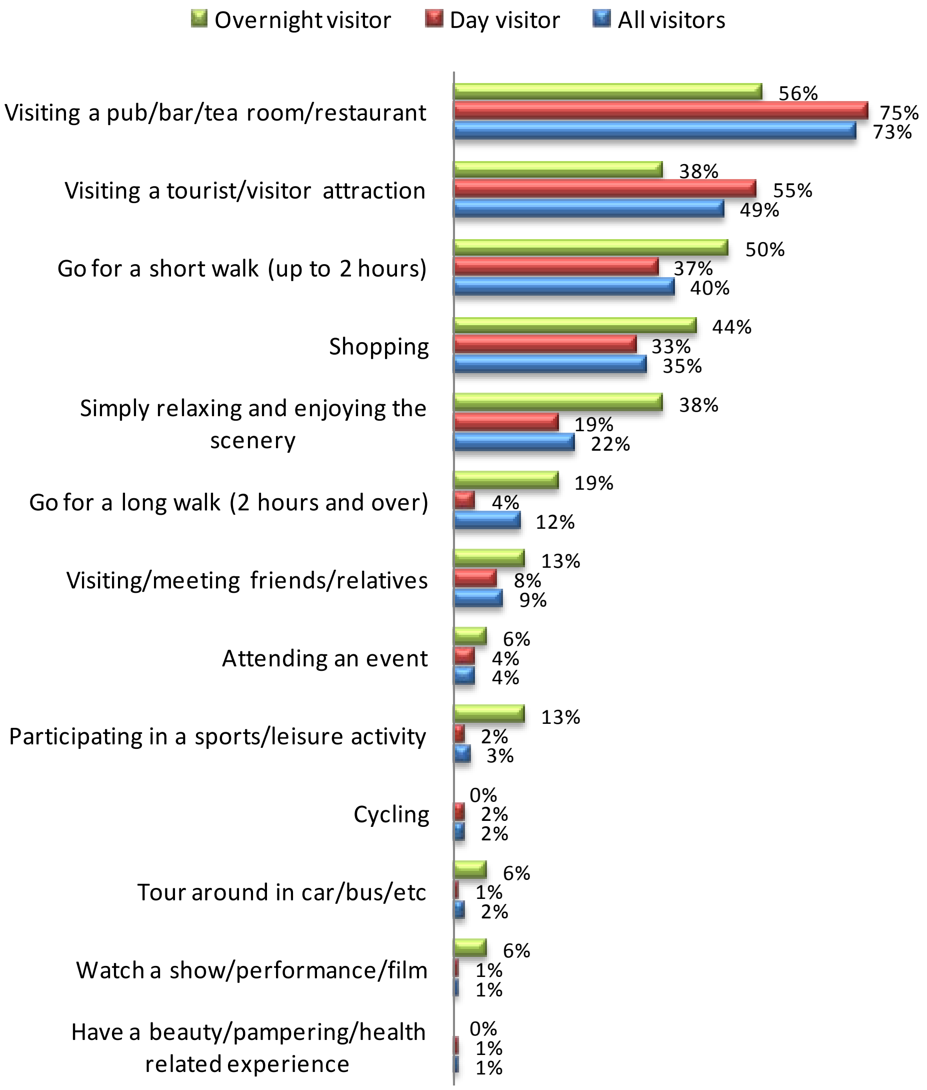


3.5 Activities undertaken / places of interest visited

3.5.1 The three most popular activities undertaken or planned to be undertaken by both day and overnight visitors were visiting somewhere for food and drink, shopping, and a walk of up to 2 hours.

3.5.2 For overnight visitors, simply relaxing and enjoying the scenery was also a popular past time during the visit (mentioned by just over a third of overnight visitors).

Figure 9: Activities undertaken

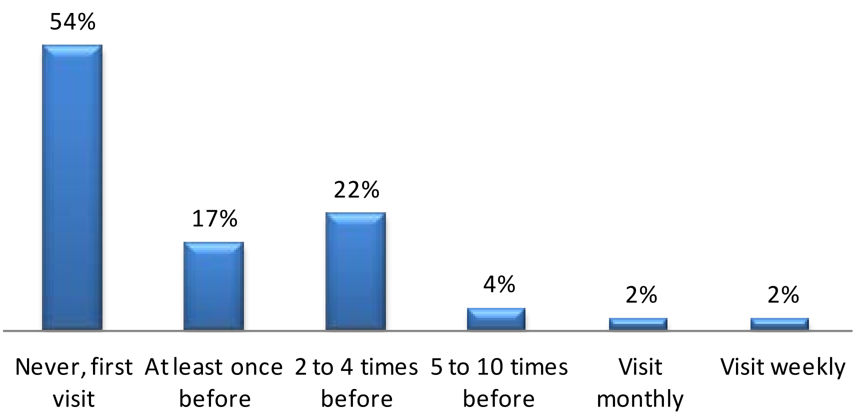


Note multiple responses permitted. Results do not sum to 100%

3.6 First time vs repeat visits

3.6.1 Petworth attracts a high proportion of first time visitors. Around a half of all visitors were visiting Petworth for the first time (34%).

Figure 10: Frequency of visits



3.6.2 Results split between day and overnight visitors reveals that a third of all overnight visitors have visited Petworth 2 to 4 times before.

Table 5: Frequency of visits

	Day visitor	Overnight visitor
	159	16
Never, first visit	58%	50%
At least once before	14%	19%
2 to 4 times before	13%	31%
5 to 10 times before	8%	0%
Visit monthly	4%	0%
Visit weekly	4%	0%

3.7 Average trip expenditure

3.7.1 Petworth visitor spent on average £13.35 per person per day on their visit on items such as food and drink and shopping.

3.7.2 Overnight visitors incurred an additional average spend per person per night of £29.85 on accommodation and £126.87 per person per trip (over entire duration of trip).

Table 6: Average expenditure per person

Base	175
Food and drink	£7.71
Shopping (e.g. buying gifts)	£5.30
Entertainment (e.g. entry fees)	£0.10
Transport (e.g. parking charges)	£0.24
Total avg spent per day per person	**£13.35**

Table 7: Average accommodation expenditure per person

Base	12
Accommodation per night per person	**£29.85**
Accommodation per trip per person	£126.87

Note that the accommodation spend is based on sample of only 12 visiting parties.

4 Trip motivations and influences

4.1 Factors most important in influencing decision to visit

4.1.1 A wide range of factors were given when asked what was most important in influencing the decision to visit. Overall, a quarter of all visitors gave the reason 'Visited before and wanted to come back', suggesting a high level of trip enjoyment with previous visits.

4.1.2 Other important influencing factors mentioned the most often was the interest in Petworth's culture and heritage and an interest in visiting its tourists attraction and this was usually Petworth House.

4.1.3 Findings between day and overnight visitors were broadly similar.

Table 8: Factors influencing decision to visit

	Overall	Day visitor	Overnight visitor
Base	175	159	16
Visited before and wanted to come back	26%	27%	25%
Interest in areas rich culture and heritage	17%	15%	19%
Visiting an attraction/number of attractions	16%	19%	13%
Recommended by friend/relative/colleague/others	13%	13%	13%
Great place for walking (range of trails/paths)	13%	12%	13%
Friends/family live here and visiting them	11%	9%	13%
The ease of getting here /excellent road and rail transport	11%	9%	13%
Opportunity to explore stunning countryside	8%	2%	13%
Quality shopping (availability of independent shops/boutiques)	8%	9%	6%
Presence of beach and water based/seaside activities	7%	1%	13%
Sheer variety of things to see and do	7%	1%	13%
The tranquil environment/ability to escape into nature	7%	7%	6%
Family friendly/great for families	5%	4%	6%
Simply passing through whilst visiting somewhere else	5%	9%	0%
Range and quality of local food and drink	4%	1%	6%
Opportunity to explore stunning coastline	3%	0%	6%
Range of quality accommodation	3%	0%	6%
Range of affordable accommodation	3%	0%	6%
Visiting to attend a specific event	1%	1%	0%

4.2 Best things about Petworth

4.2.1 Key 'best things' about Petworth from the perspective of visitors are its architecture and historic building, its relatively unspoilt nature, and its countryside, parks, gardens and open space.

Table 9: Best things about Petworth

Base	175
Architecture/buildings	34%
Unspoilt/scenery/nature	22%
Countryside, parks, gardens and open space	21%
Shopping	18%
Quaint	11%
History/culture	11%
Ambience	9%
Easy to get to	9%
Lots to do	7%
Places to walk	7%
Variety of places to eat and drink	7%
Child/family friendly	6%
Quiet	4%
Plenty of parking	4%
Lake/river/canal	4%
Village feel/rural	4%
Friendly	2%
Markets	2%

4.3 Worst things about Petworth

4.3.1 Only a fifth of visitors mentioned negative factors and among these traffic congestion appears to be the main negative aspect mentioned.

Table 10: Worst things about Petworth

Base	36
Traffic	54%
Expensive	12%
Parking (including charges)	10%
Old fashioned/dated/shabby	6%
No shade/shelter/seating	6%
Decline in number of independent shops	3%
Not much to do	3%
Not enough for children/young people	3%
Not enough bike racks	3%
Lack of good pubs and restaurants	3%
Snobby/rude people	3%
Litter	3%
Need more coffee shops on beach	3%

4.4 Aspects most strongly associated with Petworth

4.4.1 Over three quarters of all visitors associate Petworth with heritage and history. It is likely that this association is strongly linked to the fact that Pertworth is home to two historic attractions – the stately home Petworth House and Petworth Cottage Museum.

Table 11: Aspects most strongly located with Petworth

Base	175
Heritage/history	79%
Parks & Open Spaces/Gardens	47%
Arts & Culture	19%
Walking	18%
Nature and wildlife	18%
Countryside and picturesque villages	14%
Warmth of welcome	7%
The street markets	4%
Fine local food and drink	3%
Events	2%

4.5 Visitor ratings on vibrancy of Petworth

4.5.1 Visitors were asked to rate the vibrancy of Petworth on a scale of 1 to 5 where 1 depicts the town as being 'Behind the times/old fashioned' and 5 depicts the town as 'vibrant and cosmopolitan'.

4.5.2 The overall average rating score for Petworth was 3 out of 5, suggesting a relatively average vibrancy score. However, this needs to be set against the context that the town's old fashion nature is welcomed by visitors as part of its quaintness and charm.

4.6 Visitor satisfaction rates

4.6.1 The survey sought to obtain the opinions of visitors on a range of indicators which together comprise the 'visitor experience'. Each indicator was rated on a scale of one to five, where 1='Very poor' (or the most negative response) amd 5='Very good' (or the most positive response), allowing satisfaction scores' (out of 5) to be calculated. The results are presented in the following sections.

Accommodation

4.6.2 The scores of 3.9 and 3.7 respectively suggest that the quality and value for money of accommodation was rated as relatively average by overnight visitors.

Table 12: Satisfaction rating on accommodation

	Quality of service	Value for money
Mean	3.9	3.7
Very poor	0%	0%
Poor	0%	0%
Average	43%	43%
Good	29%	43%
Very good	29%	14%

Note that the accommodation rating is based on sample of only 12 visiting parties.

Visitor attractions & other places to visit

4.6.3 Visitors were more satisfied with the quality of service encountered at visitor attractions visited than their range and value for money.

Table 13: Satisfaction rating on attractions and other places to visit

	Range	Quality of service	Value for money
Mean	3.9	4.3	3.9
Very poor	0%	0%	0%
Poor	3%	0%	0%
Average	24%	13%	33%
Good	58%	48%	41%
Very good	16%	39%	25%

Places to Eat & Drink

4.6.4 As with the scores on visitor attractions, visitors were more satisfied with the quality of service encountered at eateries visited than their range and value for money.

Table 14: Satisfaction rating on places to eat and drink

	Range	Quality of service	Value for money
Mean	3.9	4.3	3.8
Very poor	0%	0%	1%
Poor	1%	1%	1%
Average	28%	7%	28%
Good	46%	54%	54%
Very good	25%	38%	16%

Shops

4.6.5 The range of shops in the town received a relatively average score of 3.5 out of 5. A significant proportion of visitors rated this aspects as ‘Average’.

4.6.6 Satisfaction with the quality of the shopping environment and quality of service was higher – scores of 4.0 and 4.2 out of 5 respectively.

Table 15: Satisfaction rating on shops

	Range	Quality of shopping environment	Quality of service
Mean	3.5	4.0	4.2
Very poor	1%	0%	0%
Poor	6%	1%	0%
Average	44%	19%	16%
Good	40%	56%	51%
Very good	9%	25%	33%

Ease of finding way around

4.6.7 Visitors gave road and pedestrian signage both an average score of 4.4 and 4.2 out of 5, respectively, indicating a relatively good level of satisfaction.

Table 16: Satisfaction rating on ease of finding one’s way around

	Road signs	Pedestrian signs
Mean	4.4	4.2
Very poor	0%	0%
Poor	2%	3%
Average	7%	8%
Good	44%	58%
Very good	47%	32%

4.7 Overall trip enjoyment

4.7.1 Overall trip enjoyment is relatively high.

4.7.2 Around two thirds of all visitors described their overall trip enjoyment as ‘High’ and a third described it as ‘Very high’.

Table 17: Overall trip enjoyment

Mean	4.2
Very low	0%
Low	0%
Average	6%
High	65%
Very high	29%

91% of visitors report that overall enjoyment was high or very high

5 Appendices

Table 18: Full list of UK visitor county of residence

Surrey	23%
Sussex	23%
Hampshire	17%
London	6%
Kent	4%
Middlesex	4%
Somerset	2%
Buckinghamshire	2%
Essex	2%
Gloucestershire	2%
Northumberland	2%
Berkshire	1%
Devon	1%
Northamptonshire	1%
Nottinghamshire	1%
Oxfordshire	1%
South Yorkshire	1%
Staffordshire	1%
Ayrshire	1%
Cheshire	1%
County of Herefordshire	1%
Dorset	1%
Leicestershire	1%
Suffolk	1%
West Yorkshire	1%
Worcestershire	1%
Total	100%

Table 19: UK visitor region of residence

South East	76%
Greater London	6%
South West	5%
East Midlands	3%
East of England	2%
North East	2%
West Midlands	2%
Yorkshire and Humber	2%
North West	1%
Northern Ireland	1%
Scotland South	1%
Total	100%

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30% or 70%	+/-	5.2
40% or 60%	+/-	5.6
50%	+/-	5.7

1.3.3 The figures are at the 95% confidence limit. This means, for example, that we can be 95% certain that, if 50% of visitors' surveyed are found to have a particular characteristic or view, there is an estimated 95% chance that the true population lies within the range of +/- 6.7% i.e. between 43.3% and 56.7 %. The margins of error shown above should be borne in mind when interpreting the results contained in this report.

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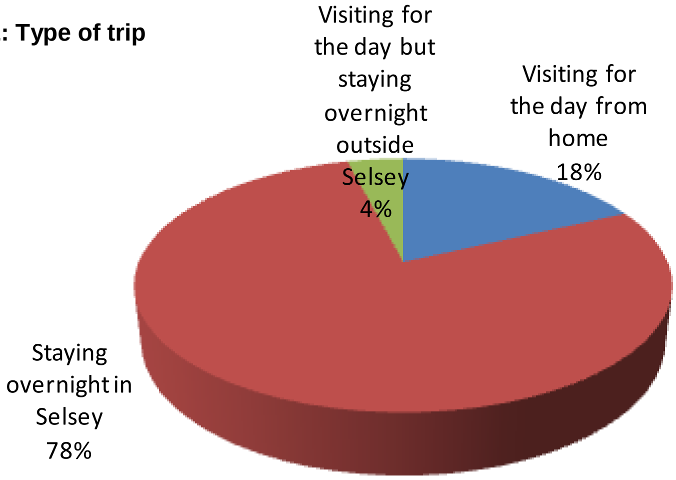
2 Visitor profile

2.1 Type of trip

2.1.1 Overall, just over three quarters Selsey's are visitors are staying overnight in the town.

2.1.2 Just under a quarter are day visitors, of which 18% are day visitors from home (returning to their home on same day of visit) and 4% are visiting for the day whilst staying overnight outside the town.

Figure 1: Type of trip



2.2 Where visitors come from

2.2.1 The Selsey visitor market is predominately domestic; 98% of visitors are from other parts of the UK and 74% of domestic visitors live in the South East.

2.2.2 The majority of domestic visitors come from Surrey and Hampshire, followed by other parts of West and East Sussex (see Appendices for full table).

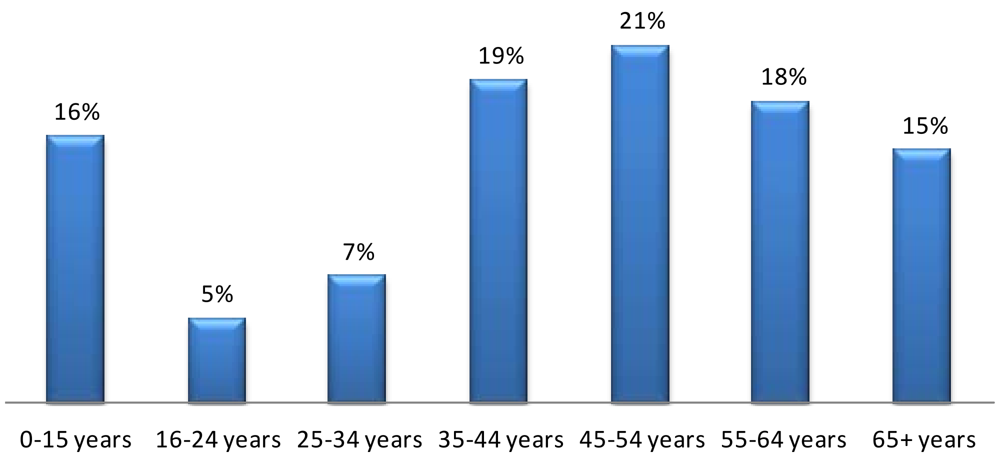
Table 2: Top 5 UK visitor county of residence

Surrey	24%
Hampshire	17%
Sussex	10%
London	9%
Middlesex	9%

2.3 Visitor age ranges

2.3.1 Visitors to Selsey show a range of ages.

Figure 2: Visitor age ranges



2.3.2 Overall, a third of Selsey visitors are retired.

Table 3: Whether retired

Yes	30%
No	70%

2.4 Visitor group size and composition

2.4.1 The average group size is 3.68 people.

2.4.2 The most common group composition among Selsey visitors is the family group (51%). This was followed by couples (32%).

Figure 3: Group composition

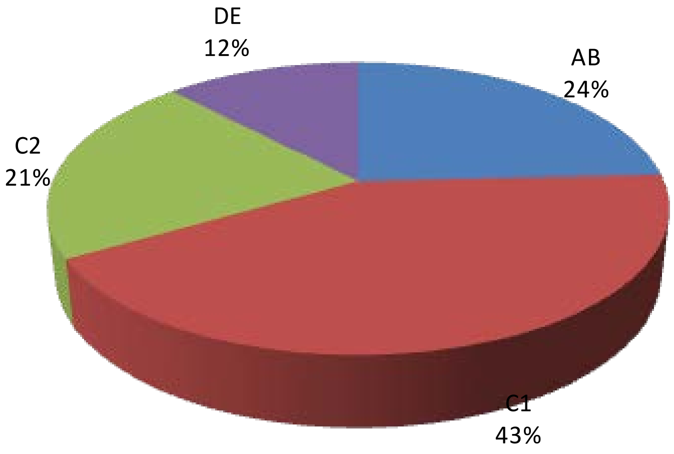
2.5 Visitor socio-economic status

2.5.1 A quarter of Selsey's visitors arefrom AB occupational grade level households, although as has been already established a proportion of visitors are now retired. The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

2.5.2 The largest occupational grade represented by visitors C1 (43%) which represents supervisory, clerical, and junior managerial and junior administrative occupations, and a further fifth are from the C2 occupational group (skilled manual works).

2.5.3 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income make up 12% of Selsey's visitors.

Figure 4: visitor socio-economic status



3 Trip features

3.1 Main reason for visiting

3.1.1 The vast majority of overnight visitors were on holiday or a short break (90%) and 1 in 10 were visiting friends or relatives in the town.

3.1.2 The vast majority of day visitors were also on a leisure based visit and a similar proportion to overnight visitors has travelled to the town to see friends or relatives.

Table 4: Main reason for visiting

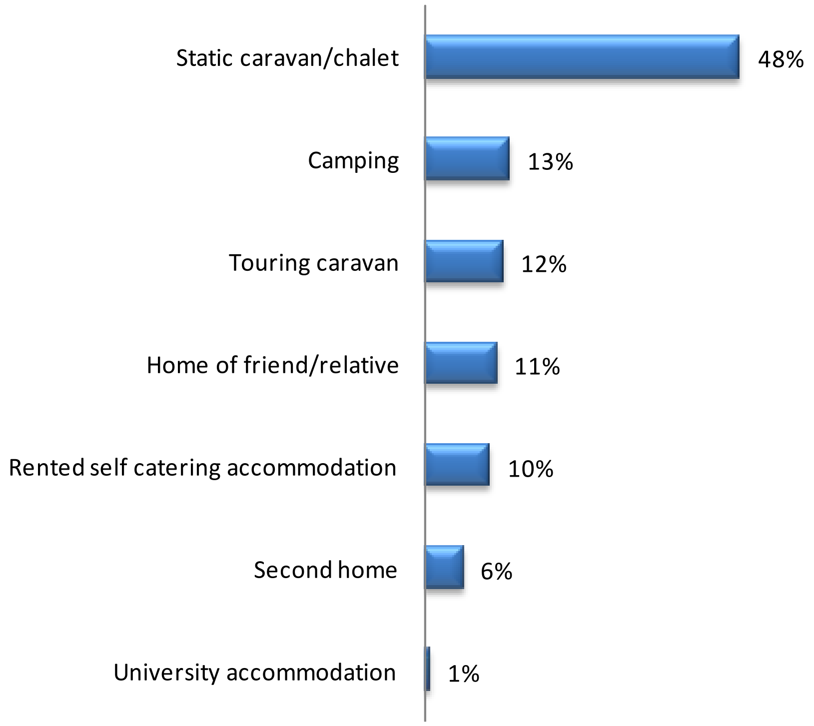
	Overall	Day visitor	Overnight visitor
Base	299	66	235
Leisure day trip	21%	89%	-
Holiday/short break	72%	-	90%
Visiting friends or relatives	8%	11%	10%

3.2 Accommodation used by overnight visitors

3.2.1 The types of accommodation used the most often by overnight visitors were static caravan/chalet accommodation found in holiday parks (48%), followed by other types of non-serviced accommodation.

3.2.2 Whilst there are a few serviced accommodation establishments in Selsey and a proportion of visitors will make use of these during their visit, no visiting party staying in one of these establishments was encountered during the survey period.

Figure 5: Type of accommodation used by overnight visitors



3.3 Average length of stay

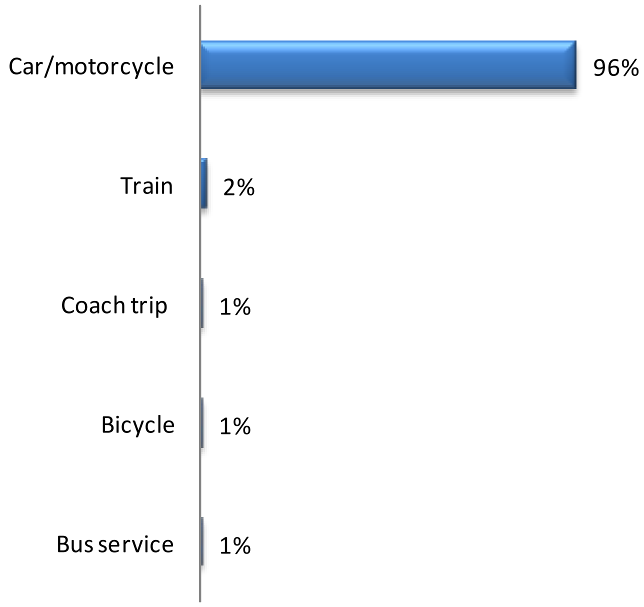
3.3.1 Day visitors spent on average 5 hours on their trip to Selsey and overnight visitors spent on average 8.9 nights on their trip.

Figure 6: Average length of stay

3.4 Main mode of transport used

3.4.1 Nearly all visitors travelled to Selsey by car. The visitor survey found that all but 4% of visitors used their car or other private motor vehicle to reach the town.

Figure 7: Main mode of transport used

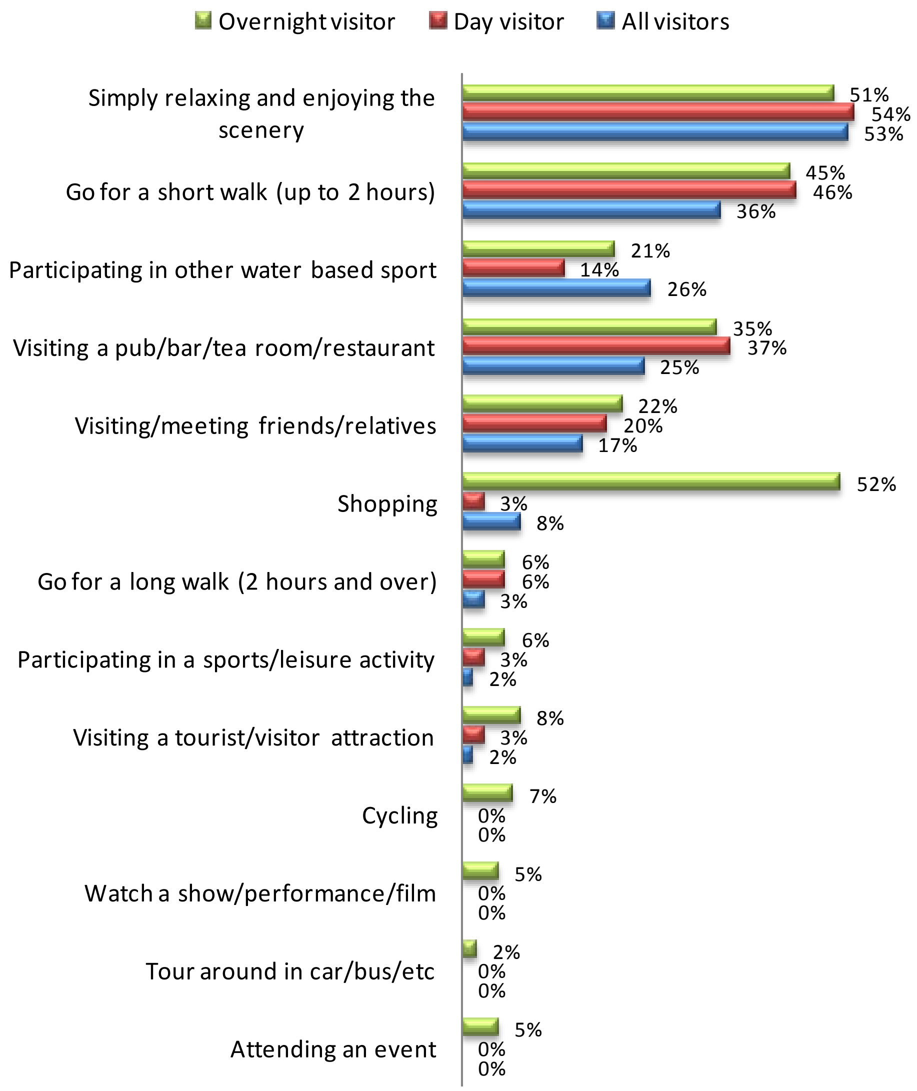


3.5 Activities undertaken / places of interest visited

3.5.1 The two most popular activities undertaken or planned to be undertaken by both day and overnight visitors were simply relaxing and enjoying the scenery and going for a short walk of up to 2 hours.

3.5.2 Shopping was a popular past time for overnight visitors.

Figure 8: Activities undertaken

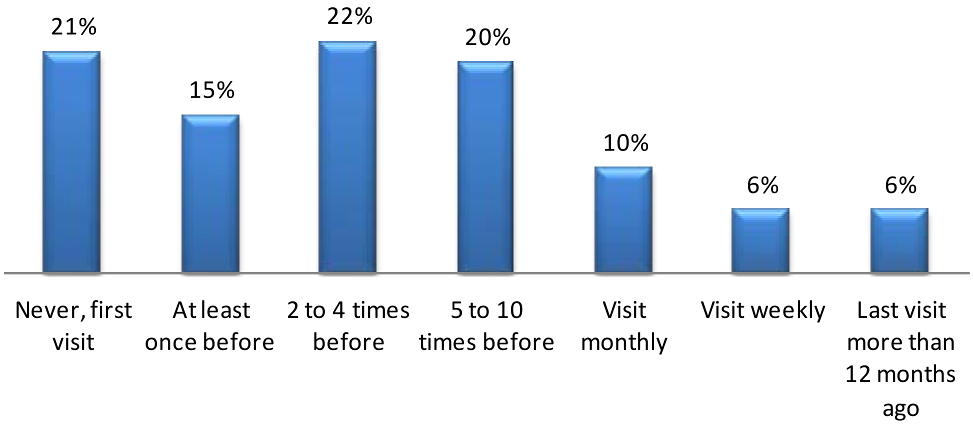


Note multiple responses permitted. Results do not sum to 100%

3.6 First time vs repeat visits

3.6.1 Almost a third of visitors were visiting Selsey for the first time (29%).

Figure 9: Frequency of visits



3.6.2 Frequency of previous visits was generally high with a quarter of day visitors having previously visited the town 2 to 4 times before and a quarter of overnight visitors having previously visited 5 to 10 times before.

Table 5: Frequency of visits by town

	Day visitor	Overnight visitor
	66	235
Never, first visit	26%	20%
At least once before	17%	14%
2 to 4 times before	26%	21%
5 to 10 times before	9%	23%
Visit monthly	9%	11%
Visit weekly	0%	8%
Last visit more than 12 months ago	14%	4%

3.7 Average trip expenditure

3.7.1 Selsey visitor spent on average £12.25 per person per day on their visit on items such as food and drink and visiting attractions.

3.7.2 Overnight visitors incurred an additional average spend per person per night of £9.69 on accommodation and £86.32 per person per trip (over entire duration of trip).

Table 6: Average expenditure per person

Base	299
Food and drink	£3.01
Shopping (e.g. buying gifts)	£7.24
Entertainment (e.g. entry fees)	£1.86
Transport (e.g. parking charges)	£0.15
Total avg spent per day per person	**£12.25**

Table 7: Average accommodation expenditure per person

Base	235
Accommodation per night per person	**£9.69**
Accommodation per trip per person	£86.32

4 Trip motivations and influences

4.1 Factors most important in influencing decision to visit

4.1.1 Given the high level of repeat visitors, it may come as no surprise that nearly two thirds of visitors gave the reason 'Visited before and wanted to come back' when asked about the most important influence on their decision to visiting the town, suggesting a high level of trip enjoyment with previous visits.

4.1.2 The third most important factor was the presence of the beach and water based/seaside activities.

4.1.3 Other influential factors included the opportunity to explore stunning coastline, the opportunities for walking and the opportunities for families.

Table 8: Factors influencing decision to visit

Base	299
Visited before and wanted to come back	61%
Presence of beach and water based/seaside activities	32%
Opportunity to explore stunning coastline	22%
Great place for walking (range of trails/paths)	20%
Family friendly/great for families	19%
Friends/family live here and visiting them	15%
The tranquil environment/ability to escape into nature	15%
Recommended by friend/relative/colleague/others	12%
The ease of getting here /excellent road and rail transport	11%
Opportunity to explore stunning countryside	9%
Range and quality of local food and drink	9%
Sheer variety of things to see and do	7%
Great place for cyclists (range of trails/cycle friendly)	6%
Interest in areas rich culture and heritage	5%
Quality shopping (availability of independent shops/boutiques)	4%
Range of quality accommodation	3%
Visiting an attraction/number of attractions	2%
Visiting to attend a specific event	2%
Nightlife and evening entertainment	2%
Simply passing through whilst visiting somewhere else	2%
Other influence	1%
Passing through having visited a nearby attraction, town or event	1%
Place has specific type of shops I like to visit	0%
Motivated to visit after hearing/seeing feature on own on radio/TV	0%
Motivated to visit after internet search on the town	0%
Range of affordable accommodation	0%

Note that blank cells means these options were not applicable/included for these particular towns

4.2 Best things about Selsey

4.2.1 Key 'best things' about Selsey from the perspective of visitors are its beach, the relative quietness of the place along with its relatively unspoilt and natural scenery and ambience and the friendliness of the people.

Table 9: Top 10 best things about Selsey

Beach	51%
Quiet	18%
Friendly	17%
Ambience	17%
Unspoilt/scenery/nature	16%
Shopping	10%
Easy to get to	9%
Quaint	7%
Variety of places to eat and drink	6%
Lots to do	6%

4.3 Worst things about the destination visited

4.3.1 Traffic congestion appears to be the main negative aspect encountered in Selsey and this is strongly related to the complaint about their being only one main road into the town.

Table 10: Top 10 worst things about Selsey

Traffic	27%
One road in and out	20%
A27	13%
Parking (including charges)	11%
Decline in number of independent shops	7%
Too crowded	7%
Weather	5%
Dogs/dog mess on beach	5%
Too many restaurants/cafes/coffee shops	4%
Lack of good pubs and restaurants	4%

4.4 Aspects most strongly associated with destinations

4.4.1 Beach/coastline/seafront is the aspect visitors most strongly associate with Selsey.

Table 11: Top 10 aspects most strongly located with Selsey

Beach/coastline/seafront	92%
Walking	31%
Warmth of welcome	30%
Countryside and picturesque villages	23%
Nature and wildlife	20%
Parks & Open Spaces/Gardens	10%
The Cathedral	9%
Heritage/History	9%
Fine local food and drink	9%
Cycling (leisurely non-competitive)	8%

4.5 Visitor ratings on vibrancy of destinations

4.5.1 Visitors were asked to rate the vibrancy of Selsey on a scale of 1 to 5 where 1 depicts the town as being ‘Behind the times/old fashioned’ and 5 depicts the town as ‘vibrant and cosmopolitan’.

4.5.2 The overall average rating score for Selsey was 3.2 out of 5 - around the middle of the vibrancy scale.

4.6 Visitor satisfaction rates

4.6.1 The survey sought to obtain the opinions of visitors on a range of indicators which together comprise the ‘visitor experience’. Each indicator was rated on a scale of one to five, where 1=’Very poor’ (or the most negative response) amd 5=’Very good’ (or the most positive response), allowing satisfaction scores’ (out of 5) to be calculated. The results are presented in the following sections.

Accommodation

4.6.2 Among visitors staying overnight in commercial accommodation in Selsey, the majority described the range, quality and value for money of accommodation as ‘Very good’.

Table 12: Satisfaction rating on accommodation

	Quality of service	Value for money
Mean	4.6	4.7
Very poor	0%	0%
Poor	1%	1%
Average	3%	3%
Good	27%	24%
Very good	69%	71%

Visitor attractions & other places to visit

4.6.3 Overall, most visitors rated the range, quality of service and value for money of places to eat and drink as 'Good' or 'Very Good'.

Table 13: Satisfaction rating on attractions and other places to visit

	Range	Quality of service	Value for money
Mean	4.2	4.3	4.2
Very poor	1%	1%	1%
Poor	3%	2%	3%
Average	14%	11%	12%
Good	37%	43%	43%
Very good	45%	43%	42%

Places to Eat & Drink

4.6.4 Visitors gave the range, quality and value for money of places to visit average scores of around the lower 4s out of 5. A significant proportion rated this aspect as 'Average'.

Table 14: Satisfaction rating on places to eat and drink

	Range	Quality of service	Value for money
Mean	4.1	4.3	4.2
Very poor	1%	0%	0%
Poor	7%	3%	4%
Average	20%	16%	18%
Good	29%	33%	33%
Very good	44%	48%	46%

Shops

4.6.5 Whilst most visitors who made use of the shops during their visit thought they were 'Good' or 'Very good', like the results on places to eat and drink, a significant proportion rated this aspect as 'Average'.

Table 15: Satisfaction rating on shops

	Range	Quality of shopping environment	Quality of service
Mean	4.0	4.1	4.1
Very poor	1%	1%	1%
Poor	7%	4%	3%
Average	24%	22%	19%
Good	32%	34%	38%
Very good	37%	39%	40%

Ease of finding way around

4.6.6 Visitors gave road and pedestrian signage both an average score of 4.5 out of 5, indicating a relatively high level of satisfaction.

Table 16: Satisfaction rating on ease of finding one's way around

	Road signs	Pedestrian signs
Mean	4.5	4.5
Very poor	0%	0%
Poor	1%	1%
Average	3%	3%
Good	29%	30%
Very good	67%	66%

4.7 Overall trip enjoyment

4.7.1 Overall trip enjoyment was relatively high. The average score for enjoyment is 4.5.

4.7.2 A half of all visitors described their overall trip enjoyment as 'High' and the other half described it as 'Very high'.

Table 17: Overall trip enjoyment

Base	1899
Mean	4.5
Very low	0%
Low	0%
Average	1%
High	49%
Very high	50%

99% of visitors report that overall enjoyment was high or very high

5 Appendices

Table 18: Full list of UK visitor county of residence – Selsey

Surrey	24%
Hampshire	17%
Sussex	10%
London	9%
Middlesex	9%
Berkshire	7%
Hertfordshire	3%
Buckinghamshire	3%
Kent	3%
Oxfordshire	3%
Suffolk	2%
Essex	2%
Dorset	1%
Wiltshire	1%
Cambridgeshire	0.5%
Carmarthenshire	0.5%
Derbyshire	0.5%
Devon	0.5%
Essex	0.5%
Lancashire	0.5%
Leicestershire	0.5%
Nottinghamshire	0.5%
Renfrewshire	0.5%
Somerset	0.5%
South Yorkshire	0.5%
Staffordshire	0.5%
Warwickshire	0.5%
Worcestershire	0.5%
Total	100%

5.1 'Best' and 'worst' things tables

Table 19: Best things about Selsey

Beach	51%
Quiet	18%
Friendly	17%
Ambience	17%
Unspoilt/scenery/nature	16%
Shopping	10%
Easy to get to	9%
Quaint	7%
Variety of places to eat and drink	6%
Lots to do	6%
Choice of accommodation	6%
Seafront/Promenade	5%
Child/family friendly	4%
Clean	3%
Places to walk	2%
Not commercialised	2%
History/culture	1%
Nice place to live	1%
Parks and gardens	1%
Accessible/easy to get around	1%
Street entertainment	1%
Good public transport	1%
Close to sea	1%
Fresh air	1%
Dog friendly	1%

Lake/river/canal	1%
Funfair/arcades	1%
Seating	1%
Watching ships/harbour	1%
Swimming pool	1%

Table 20: Worst things about Selsey

Traffic	27%
One road in and out	20%
A27	13%
Parking (including charges)	11%
Decline in number of independent shops	7%
Too crowded	7%
Weather	5%
Dogs/dog mess on beach	5%
Too many restaurants/cafes/coffee shops	4%
Lack of good pubs and restaurants	4%
Stony beach	4%
Building/road works	2%
Not much to do	2%
Shops, cafes and pubs shut too early	2%
Not enough big name shops	2%
Lack of evening public transport	2%
Expensive	2%
Youths hanging around	2%
Litter	2%
Old fashioned/dated/shabby	2%
No shade/shelter/seating	2%

5.2 Aspects most strongly associated with destination tables

Table 21: Aspects most strongly located with Selsey

Beach/coastline/seafront	92%
Walking	31%
Warmth of welcome	30%
Countryside and picturesque villages	23%
Nature and wildlife	20%
Parks & Open Spaces/Gardens	10%
The Cathedral	9%
Heritage/History	9%
Fine local food and drink	9%
Cycling (leisurely non-competitive)	8%
Water sports	7%
Shopping	5%
Ease of access/strong transport links connectivity	5%
Events	4%
Outdoor sports	4%
The street markets	3%
Arts & Culture	2%
Nightlife	2%
Vibrant and cosmopolitan towns	2%
Pier	2%

Accredited by:

Contact: research@tourismse.com

Coastal West Sussex Tourism Research Project 2016

Visitor Survey
Report of Findings

Prepared by:
TSE Research
40 Chamberlayne Road
Eastleigh
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TSE RESEARCH

September 2016

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Contents

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This document has been formatted to allow for double-sided printing

1 Introduction

1.1 Aims and objectives of survey

1.1.1 This report presents the findings of a visitor survey designed to find out more about visitors to Coastal West Sussex and offer insights into potential new visitor markets. The study was commissioned by Coastal West Sussex Marketing and undertaken by TSE Research, the research arm of Tourism South East.

1.1.2 The survey involved face-to-face interviews with a random sample of visitors across key destinations to gather information on the profile of visitors, key features of their trip, motivations for visiting, and levels of satisfaction with the visit.

1.1.3 The key objectives and outcomes were as follows:

Key objectives:

- To collect up to date information on the origin, profile, behaviour and opinions of day and staying visitors.
- To measure the components currently contributing most to customers' satisfaction.
- To measure the effectiveness of current marketing and branding.

Key outcomes:

- ➢ Guide the design of responsive tourism products and services to meet the needs of visitors.
- ➢ Guide the development of effective and cost-efficient promotional tactics and campaigns.
- ➢ Gauge and assess Coastal West Sussex's market position in terms of how the destination is perceived by visitors.
- ➢ Identify which market sectors are likely to generate repeat /new custom.

1.2 Survey approach

1.2.1 In total, 1,899 visitors were personally interviewed over the peak summer period from the start of the school summer holidays to the first week of September 2016.

1.2.2 The distribution of the sample across each destination is presented in Table 1 below.

Table 1: Sample distribution by town

Sampling location	Sample achieved
Chichester (city)	491
Selsey & Witterings	199
Worthing	396
Arundel	405
Bognor Regis	196
Littlehampton	212
Total	1899

1.2.3 As with any sample survey, the results from this survey have associated margins of error. These margins of error should be borne in mind when reviewing the survey results. Generally speaking the larger the sample, the lower the margin of error and thus there is a higher level of confidence in the results. A standard survey will usually have a confidence level of 95% and a margin of error of 5%.The results presented in this report at the Coastal West Sussex level (i.e. all visitors) are based on a relatively large sample of 1,899 visitors and has an associated margin of error of -/+2.2%. Therefore, the results at the Coastal West Sussex level provide a relatively high level of confidence.

1.2.4 However, once the results are split by destinations in order to identify any significant variations in the visitor population, the sample becomes smaller, and the results have much wider margins of error. Samples of around 400 carry a margin of error of -/+ 6.9% and samples of around 200 carry a margin of error of -/+4.9%.

1.3 Outline of report

1.3.1 Survey findings on the profile of visitors are presented in Chapter 3 of this report.

1.3.2 Survey findings on features of the trip (e.g. mode of travel, activities undertaken, trip expenditure) are presented in Chapter 4.

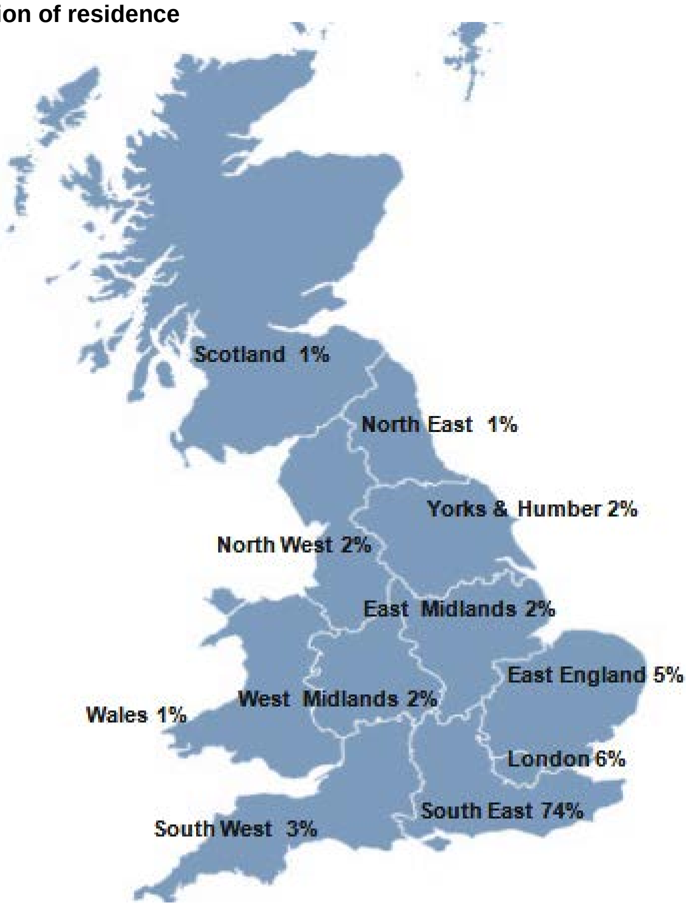
1.3.3 Survey findings on the reasons people visit Coastal West Sussex and the role different factors play in influencing the decision to visit are presented in Chapter 5.

2 Visitor profile

2.1 Where visitors come from

2.1.1 The Coastal West Sussex visitor market is predominately domestic; 95% of visitors are from other parts of the UK and 74% of domestic visitors live in the South East.

Figure 1: UK visitor region of residence



2.1.2 Results at destination level show that Arundel has a higher proportion of overseas visitors than the other destinations.

Table 2: Proportion of domestic and overseas visitors by town

	Overall	UK	Overseas
Overall	1894	95%	5%
Chichester	486	95%	5%
Selsey & Witterings	199	98%	2%
Worthing	396	93%	7%
Arundel	405	90%	10%
Bognor Regis	196	98%	2%
Littlehampton	212	98%	2%

2.1.3 The majority of domestic visitors come from other parts of West and East Sussex, followed by Surrey and Hampshire.

2.1.4 Top countries from where overseas visitors come from include Germany, Australia and the USA. For a full list see additional tables in the Appendices.

Table 3: UK County of residence (top 10)

Base	1793
Sussex	33%
Surrey	15%
Hampshire	14%
London	6%
Kent	3%
Middlesex	3%
Berkshire	3%
Buckinghamshire	2%
Essex	2%
Hertfordshire	1%

Table 4: Country of residence (top 10)

Base	101
Germany	18%
Australia	17%
U.S.A.	14%
France	7%
Italy	6%
Rep. of Ireland	5%
Netherlands	5%
Spain	5%
Canada	4%
Austria	2%

2.1.5 The main UK counties from where domestic visitors come from are presented in tables 5 to 10. For a full list see additional tables in the Appendices.

Table 5: Top 5 UK visitor county of residence – Chichester (city)

Sussex	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%

Table 6: Top 5 UK visitor county of residence – Selsey

Surrey	24%
Hampshire	17%
Sussex	10%
London	9%
Middlesex	9%

Table 7: Top 5 UK visitor county of residence – Worthing

Sussex	29%
Surrey	19%
London	7%
Kent	4%
Hampshire	4%

Table 8: Top 5 UK visitor county of residence – Arundel

Sussex	38%
Hampshire	13%
Surrey	10%
Kent	5%
London	4%

Table 9: Top 5 UK visitor county of residence – Bognor Regis

Surrey	18%
Sussex	14%
London	11%
Hampshire	10%
Middlesex	6%

Table 10: Full list of UK visitor county of residence – Littlehampton

Sussex	34%
Surrey	25%
Hampshire	10%
London	7%
Middlesex	4%

2.2 Visitor age ranges

2.2.1 The age ranges of visitors show a strong leaning towards older visitors; 56% are aged 55 years and over and a third of Coastal West Sussex visitors are retired.

2.2.2 Results at destination level reveals that visitors to Worthing generally tend to be a little older than visitors to other parts of Coastal West Sussex; Bognor and Littlehampton visitors are a little young.

Figure 2: Visitor age ranges

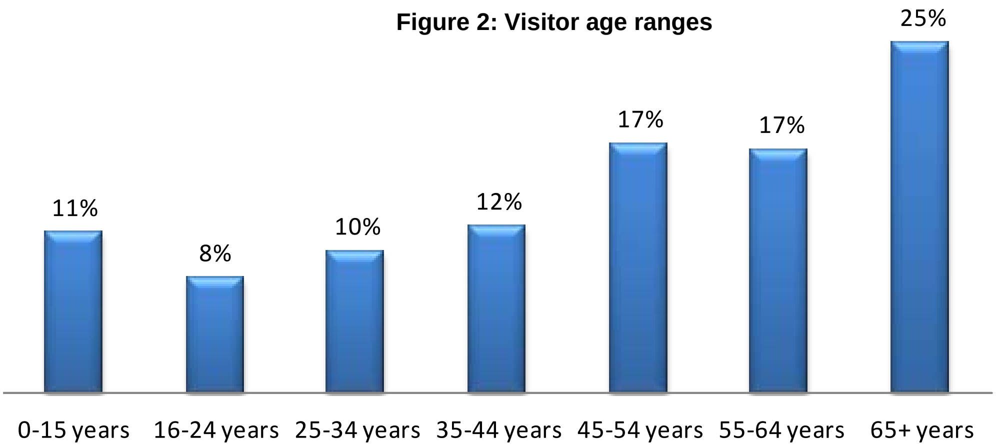


Table 11: Visitor age ranges by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
0-15	3%	16%	14%	9%	22%	24%
16-24	14%	5%	4%	7%	7%	9%
25-34	14%	7%	7%	9%	9%	13%
35-44	9%	19%	10%	11%	18%	14%
45-54	16%	21%	15%	24%	18%	16%
55-64	18%	18%	17%	17%	15%	12%
65+	26%	15%	34%	24%	12%	12%

Table 12: Proportion of retired visitors by town

	Overall	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	1894	486	199	396	405	196	212
Retired	32%	30%	30%	51%	26%	20%	19%
Not retired	68%	70%	70%	49%	74%	80%	81%

2.3 Visitor group size and composition

2.3.1 The average group size is 2.9 people. This varies from an average group size of 1.89 among Chichester city visitors and 3.68 among Selsey visitors.

Table 13: Average group size by town

Chichester	486	1.89
Selsey & Witterings	199	3.68
Worthing	396	2.46
Arundel	405	2.60
Bognor Regis	196	3.22
Littlehampton	212	3.47

Figure 3: Avg. group size

2.3.2 The most common group composition among Coastal West Sussex visitors is the family group (41%). This is followed by couples (32%).

Figure 4: Group composition

2.3.3 A significant proportion of people visit on their own, but it should be noted that this overall figure is strongly influenced by a relatively large proportion of people visiting on their own encountered in the city centre of Chichester. A proportion of these will be from other parts of the wider Chichester District visiting for shopping and other more routine purposes.

Table 14: Group composition by district

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
With partner/spouse	34%	32%	38%	41%	29%	20%
By myself	33%	5%	19%	12%	11%	8%
With family	20%	51%	29%	30%	51%	62%
With friends	8%	4%	11%	9%	4%	5%
With friends & family	5%	8%	3%	7%	6%	4%
Colleague	0%	1%	0%	1%	0%	0%
Other	0%	0%	0%	0%	0%	0%

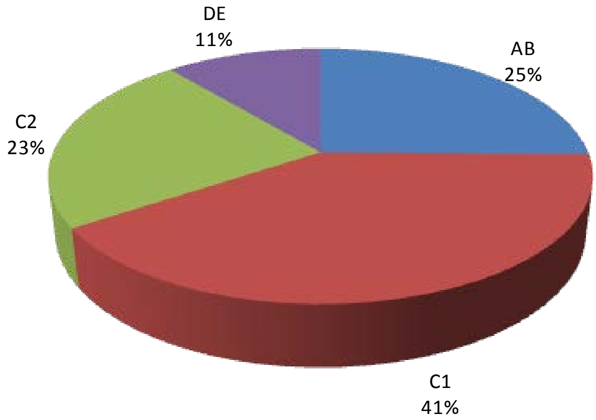
2.4 Visitor socio-economic status

2.4.1 A quarter of Coastal West Sussex visitors are from AB occupational grade level households, although as has been already established a proportion of these visitors are now retired. The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

2.4.2 The largest group of visitors (41%) are from C1 occupational grade - supervisory, clerical, and junior managerial and junior administrative occupations, and a further quarter are from the C2 occupational group (skilled manual works).

2.4.3 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income make up 11% of Coastal West Sussex's visitors.

Figure 5: visitor socio-economic status



2.4.4 Results by destination show that Selsey visitors are more likely to be from AB occupational backgrounds than those visiting other parts of Coastal West Sussex.

Table 15: Visitor socio-economic status by town

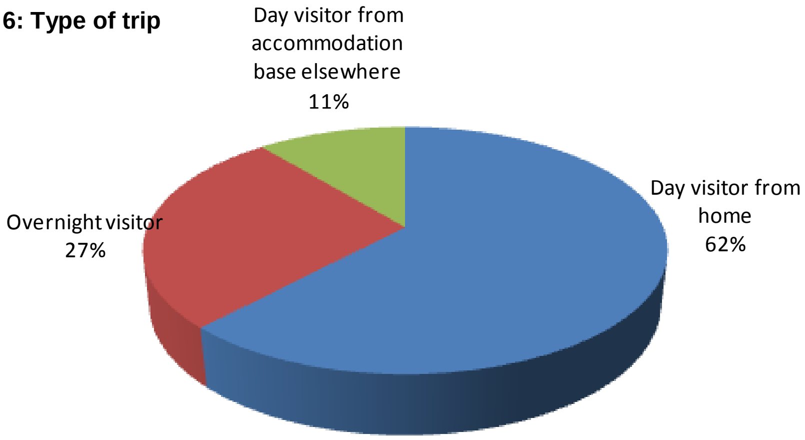
	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
AB	24%	31%	23%	27%	19%	19%
C1	42%	30%	37%	46%	35%	35%
C2	21%	30%	27%	21%	29%	32%
DE	12%	9%	13%	6%	17%	14%

3 Trip features

3.1 Type of trip

3.1.1 Overall, around two thirds of Coastal West Sussex visitors are day visitors from home (returning to their home on same day of visit). A further 11% are visiting for the day whilst staying overnight elsewhere, and just over a quarter (27%) are staying overnight in Coastal West Sussex.

Figure 6: Type of trip



3.1.2 The results at destination level, however, differ quite significantly and make it challenging to present an accurate 'Coastal West Sussex' picture.

3.1.3 The survey found that only 8% of people visiting the Chichester City were staying overnight in the city, whereas 78% of Selsey visitors were staying overnight in Selsey. Bognor Regis also has a relatively strong overnight visitor market (51% staying overnight).

Table 16: Type of trip by town

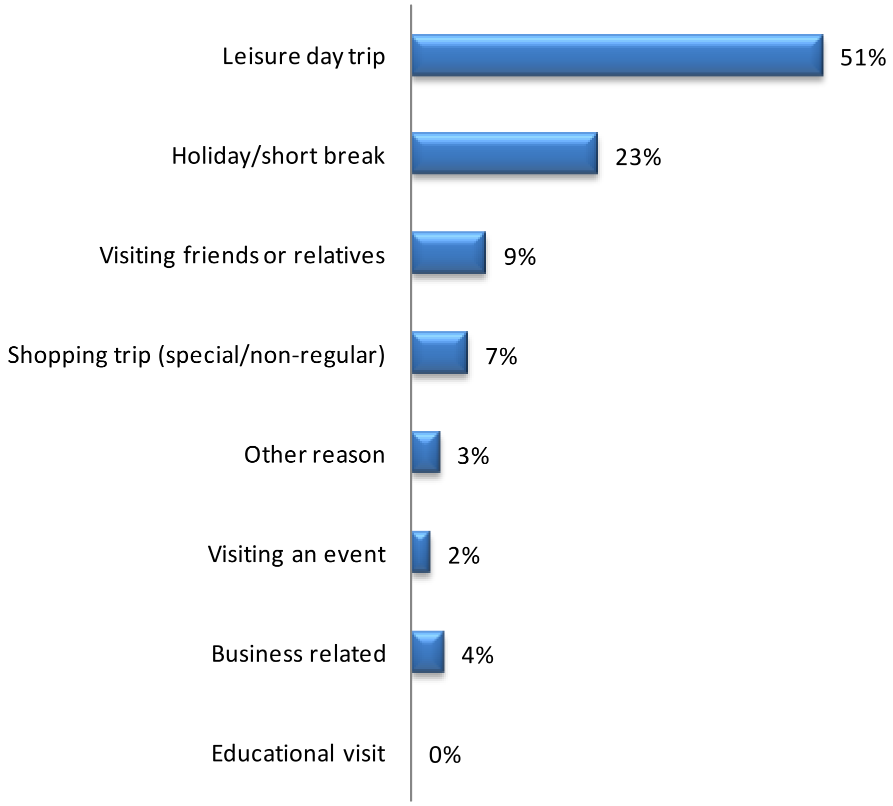
	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
Base	486	199	394	405	196	212
Visiting for the day from home	76%	18%	62%	66%	43%	79%
Staying overnight within district/city	8%	78%	25%	22%	51%	15%
Visiting for the day but staying overnight outside district/city	16%	4%	13%	12%	6%	7%

3.2 Main reason for visiting

3.2.1 Although around three quarters of visitors were on a day trip (62% visiting from home and 11% from accommodation elsewhere), only a half of all visitors described their visit as a leisure day out, suggesting that significant proportion of day visitors were visiting for other purposes such as seeing relatives or were on a special shopping trip.

3.2.2 The vast majority of overnight visitors were on holiday or a short break. Of the 27% encountered during the survey period, 23% described their visit as 'Holiday/short break'.

Figure 7: Main reason for visiting



3.2.3 The results at destination level reflect the differences seen in the relative proportion of day and overnight visitors at this level. As already established the majority of Selsey visitors were overnight visitors and most of these were on holiday or a short break.

Table 17: Main reason for visiting by town

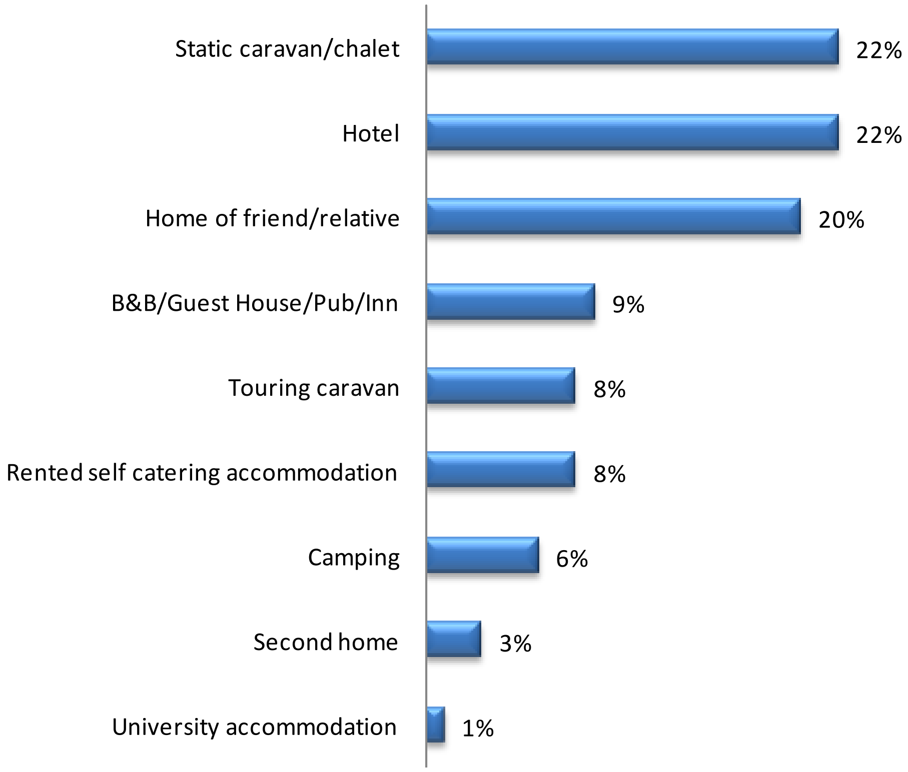
	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
Leisure day trip	33%	21%	67%	73%	46%	82%
Holiday/short break	5%	72%	23%	19%	45%	13%
Visiting friends or relatives	18%	8%	7%	4%	9%	4%
Visiting an event	8%	0%	0%	0%	0%	0%
Shopping trip (special not regular)	27%	0%	1%	1%	1%	0%
Business related	3%	0%	1%	1%	0%	0%
Other reason	6%	0%	0%	1%	0%	1%
Educational visit	0%	0%	0%	0%	0%	0%

3.2.4 Special shopping trip as a reason for visiting is not significant for destinations except Chichester where it is the reason for 27% of trips.

3.3 Accommodation used by overnight visitors

3.3.1 The types of accommodation used the most often by overnight visitors are static caravan/chalet accommodation found in holiday parks (22%), hotels (22%), and the home of friends or relatives (20%).

Figure 8: Type of accommodation used by overnight visitors



3.3.2 Once again the results vary by destination making it challenging to present an overall 'Coastal West Sussex' picture. Hotels are the most common type of accommodation used by visitors staying in Chichester City, whereas holiday parks are popular for visitors staying in Selsey and Bognor Regis.

Table 18: Type of accommodation used by overnight visitors by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	38	156	99	85	99	29
Hotel	42%	0%	39%	28%	30%	14%
Home of friend/relative	32%	11%	35%	15%	15%	34%
Static caravan/chalet	0%	48%	0%	2%	29%	14%
B&B/Guest House/Pub/Inn	11%	0%	11%	29%	5%	3%
Rented self catering	5%	10%	1%	11%	13%	10%
Touring caravan	3%	12%	6%	4%	4%	17%
Camping	3%	13%	2%	6%	1%	3%
Second home	0%	6%	5%	1%	0%	3%
University accommodation	3%	1%	0%	0%	2%	0%
Youth hostel	0%	0%	0%	2%	0%	0%
Other	3%	0%	0%	1%	0%	0%

3.4 Average length of stay

3.4.1 Day visitors spend on average 4.5 hours on their trip to Coastal West Sussex and overnight visitors spend on average 6.6 nights on their trip.

Figure 9: Average length of stay

3.4.2 Day trips are shortest for those visiting the Chichester City (3.4 hours) and longest for those visiting Arundel (5.7 hours).

3.4.3 Trip length for overnight visitors also varies across destinations. Overnight visitors spend on average nearly 9 nights when staying in Selsey and Littlehampton and 3.5 nights when staying in Arundel.

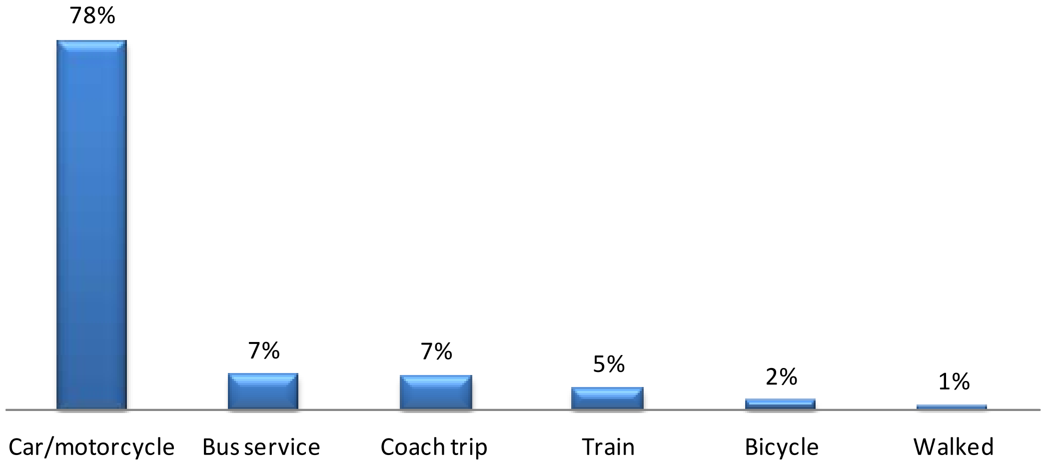
Table 19: Average length of stay by town

	Day visitor	Overnight visitor
	Avg. length of hours	Avg. length of nights
Chichester	3.4	3.9
Selsey & Witterings	5.0	8.9
Worthing	4.5	6.5
Arundel	5.7	3.5
Bognor Regis	5.2	5.0
L'hampton	5.2	8.7

3.5 Main mode of transport used

3.5.1 The car is the most common mode of transport used to reach Coastal West Sussex (78% of visitors travel by car).

Figure 10: Main mode of transport used



3.5.2 Public transport is more likely to be used to travel to Chichester, Worthing and Bognor Regis. A small but significant proportion of visitors travel to Worthing by coach as part of a pre-booked coach trip (13%).

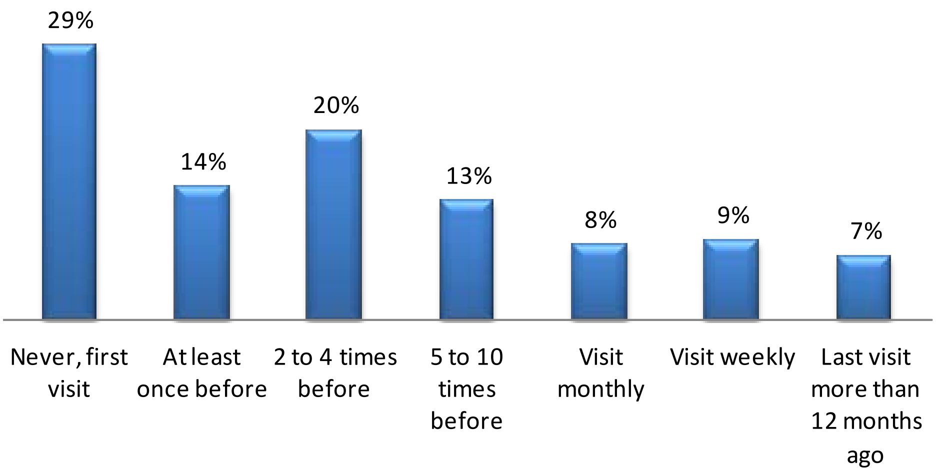
Table 20: Main mode of transport used by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
Car/motorcycle	67%	96%	61%	84%	76%	83%
Bus service	14%	1%	15%	4%	8%	2%
Train	10%	2%	6%	6%	12%	7%
Bicycle	5%	1%	2%	0%	0%	3%
Coach trip	2%	1%	13%	4%	3%	4%
Walked	1%	0%	1%	1%	1%	1%
Other	1%	0%	1%	0%	0%	0%
Taxi	0%	0%	0%	0%	1%	0%

3.6 First time vs repeat visits

3.6.1 Almost a third of visitors were visiting Coastal West Sussex for the first time (29%).

Figure 11: Frequency of visits



3.6.2 Results by destination show that frequency of visit is relatively high among Chichester visitors; a fifth visit monthly and almost a third visit weekly. These are likely to be visitors who live in neighbouring towns and villages including those located in the wider district of Chichester.

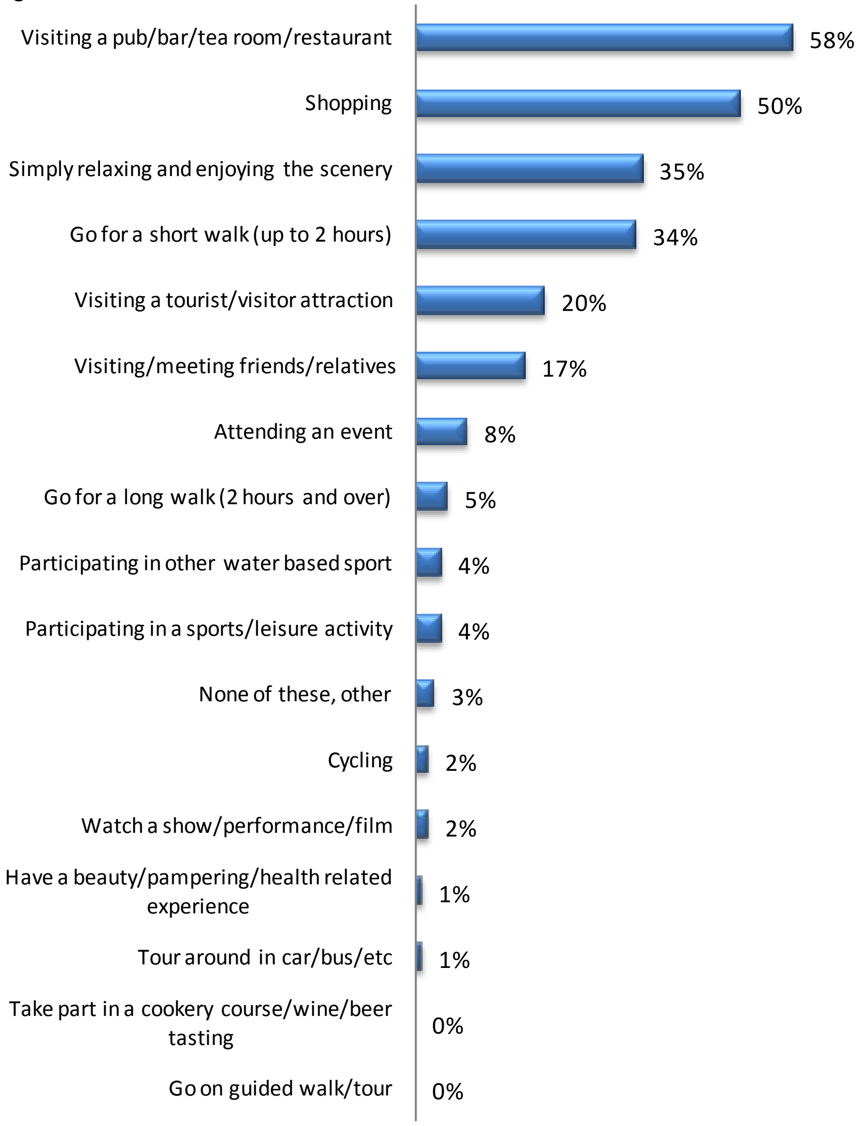
Table 21: Frequency of visits by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
Never, first visit	22%	21%	26%	36%	36%	34%
At least once before	6%	15%	13%	13%	23%	15%
2 to 4 times before	10%	22%	20%	22%	22%	25%
5 to 10 times before	10%	20%	13%	9%	10%	14%
Visit monthly	19%	10%	8%	4%	3%	4%
Visit weekly	29%	6%	7%	3%	2%	4%
Last visit more than 12 months ago	4%	6%	13%	13%	4%	1%

3.7 Activities undertaken / places of interest visited

3.7.1 The two most popular activities undertaken or planned to be undertaken are visiting a pub, bar, tea room, or restaurant, and shopping. A half of all visitors take part in these activities at some point during their visit.

Figure 12: Activities undertaken



Note multiple responses permitted. Results do not sum to 100%

3.7.2 A third of visitors enjoy relaxing and enjoying the scenery and a further third go for a short walk of up to 2 hours.

3.7.3 At destination level, there are differences with the popularity of different activities. For example, shopping is far more popular among Chichester City visitors, whereas simply relaxing and enjoying the scenery is more popular among Worthing visitors.

Table 22: Activities undertaken by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
Shopping	**71%**	42%	55%	34%	39%	19%
Visiting a pub/bar/tea room/restaurant	61%	34%	64%	60%	45%	47%
Simply relaxing and enjoying the scenery	<1%	53%	77%	42%	69%	63%
Go for a short walk (up to 2 hours)	<1%	44%	71%	47%	53%	47%
Visiting a tourist/visitor attraction	11%	7%	12%	48%	17%	22%
Visiting/meeting friends/relatives	16%	21%	21%	16%	19%	13%
Attending an event	5%	4%	7%	20%	16%	2%
Go for a long walk (2 hours and over)	0%	6%	8%	9%	14%	6%
Participating in a sports/leisure activity	3%	6%	4%	2%	9%	7%
Participating in other water based sport	0%	20%	4%	2%	10%	12%
None of these, other	7%	1%	1%	0%	0%	1%
Watch a show/performance/film	2%	4%	3%	2%	7%	1%
Cycling	0%	6%	5%	0%	2%	2%
Tour around in car/bus/etc	0%	2%	3%	2%	3%	2%
Have a beauty/health related experience	3%	0%	0%	1%	1%	0%
Go on guided walk/tour	1%	0%	0%	0%	1%	0%
Take part in a cookery course/wine/beer tasting	0%	0%	1%	0%	1%	0%

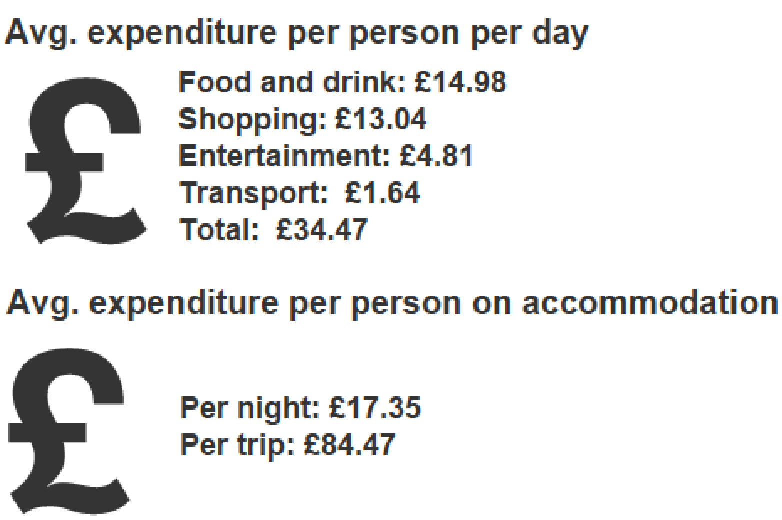
Note multiple responses permitted. Results do not sum to 100%

3.8 Average trip expenditure

3.8.1 Coastal West Sussex visitor spend on average £34.47 per person per day on their visit on items such as food and drink and visiting attractions.

3.8.2 Overnight visitors incur an additional average spend per person per night of £17.35 on accommodation and £84.47 per person per trip.

Figure 13: Average expenditure per person



3.8.3 Average trip expenditure varies significantly across the destinations. Visitor spend per day is higher among Chichester City visitors (£45.10 per person per day) and lowest among Littlehampton visitors (£8.66 per person per day).

3.8.4 Average overnight visitor expenditure per person n accommodation among Chichester City visitors may appear lower than might be expected for a historic city (for Bath its £44.94 and for York its £44.60)[1]. This finding needs to be set against the context that the overall proportion of visitors found to be staying overnight in the city was relatively low (8%) and many of these visitors stayed in the homes of friends or relatives or in second homes and thus incurred no additional accommodation expenditure.

Table 23: Average expenditure per person by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
	486	199	396	405	196	212
Food and drink	£11.09	£3.01	£10.99	£4.23	£17.65	£13.42
Shopping (e.g. buying gifts)	£26.63	£7.24	£8.36	£3.22	£7.83	£3.16
Entertainment (e.g. entry fees)	£6.83	£1.86	£1.67	£0.64	£3.59	£5.04
Transport (e.g. parking charges)	£0.54	£0.15	£1.39	£0.53	£0.60	£2.13
Total avg spent per day per person	**£45.10**	**£12.25**	**£22.40**	**£8.62**	**£29.67**	**£23.76**
Accommodation per night per person	**£25.78**	**£9.69**	**£14.53**	**£29.68**	**£15.74**	**£8.66**
Accommodation per trip per person	£92.81	£86.32	£76.14	£103.91	£72.26	£75.35

[1] *Source: 2015 Bath Visitor Survey and 2015 York Visitor Survey*

4 Trip motivations and influences

4.1 Factors most important in influencing decision to visit

4.1.1 The two top factors which played the most important role in the decision to visit Coastal West Sussex are 'Visited before and wanted to come back' (50%) and 'Presence of beach and water based/seaside activities (41%).

4.1.2 For a fifth of visitors, the family friendliness and opportunities for families was the most important factor influencing the decision to visit. The full list of responses is presented in the table below.

Table 24: Factors influencing decision to visit

Base	1894
Visited before and wanted to come back	50%
Presence of beach and water based/seaside activities	41%
Family friendly/great for families	20%
Great place for walking (range of trails/paths)	16%
The ease of getting her from home/excellent road and rail transport	14%
Friends/family live here and visiting them	13%
The tranquil environment/ability to escape into nature	12%
Opportunity to explore stunning coastline	12%
Range and quality of local food and drink	11%
Recommended by friend/relative/colleague/others	11%
Sheer variety of things to see and do	10%
Visiting an attraction/number of attractions	8%
Interest in areas rich culture and heritage	6%
Other influence	6%
Visiting to attend a specific event	6%
Quality shopping (availability of independent shops/boutiques)	6%
Opportunity to explore stunning countryside and escape into nature	5%
Simply passing through whilst visiting somewhere else	4%
Great place for cyclists (range of trails/cycle friendly)	3%
Place has specific type of shops I like to visit	3%
Range of affordable accommodation	3%
Range of quality accommodation	2%
Nightlife and evening entertainment	2%

4.1.3 Results at destination level reveal that the positive experience from a previous visit was particularly important among Littlehampton visitors (64% mentioned this aspect) and Selsey visitors (61% mentioned this aspect).

4.1.4 The presence of the beach and water based activities was the second most important factor influencing the decision to visit Selsey, Worthing, Bognor and Littlehampton.

Table 25: Factors influencing decision to visit by town

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
Base	486	199	396	405	196	212
Visited before and wanted to come back	34%	61%	51%	41%	49%	64%
Other influence	20%	1%	3%	3%	7%	2%
Place has specific type of shops I like to visit	18%	0%	0%	0%	0%	0%
Friends/family live here and visiting them	10%	15%	18%	7%	18%	10%
Visiting an attraction/number of attractions	8%	2%	3%	26%	4%	4%
Visiting to attend a specific event	5%	2%	5%	8%	11%	2%
Recommended by friend/relative/colleague/others	4%	12%	12%	12%	11%	13%
Passing through having visited a nearby attraction, town or event	2%	1%	0%	0%	0%	1%
Motivated to visit after hearing/seeing feature on own on radio/TV	0%	0%	0%	0%	1%	0%
Motivated to visit after internet search on the town	0%	0%	0%	0%	0%	0%
The ease of getting her from home/excellent road and rail transport	0%	11%	19%	9%	21%	24%
Quality shopping (availability of independent shops/boutiques)	0%	4%	11%	6%	9%	3%
Presence of beach and water based/seaside activities	-	32%	41%	-	40%	51%
The tranquil environment/ability to escape into nature	-	15%	12%	14%	9%	10%
Interest in areas rich culture and heritage	-	5%	2%	19%	4%	2%
Opportunity to explore stunning coastline		22%	10%	2%	12%	12%
Opportunity to explore stunning countryside and escape into nature	-	9%	2%	7%	3%	3%
Sheer variety of things to see and do	-	7%	8%	7%	15%	12%
Great place for walking (range of trails/paths)	-	20%	12%	13%	15%	19%
Great place for cyclists (range of trails/cycle friendly)	-	6%	3%	1%	2%	4%
Range and quality of local food and drink		9%	13%	13%	7%	12%
Family friendly/great for families	-	19%	16%	7%	28%	32%
Nightlife and evening entertainment	-	2%	1%	0%	4%	0%
Range of quality accommodation	-	3%	1%	1%	4%	0%
Range of affordable accommodation		0%	2%	2%	6%	1%
Simply passing through whilst visiting somewhere else		2%	5%	5%	2%	4%

Note that blank cells means these options were not applicable/included for these particular towns

4.2 Best things about the destination visited

4.2.1 A question on what visitors most strongly associate with a 'Coastal West Sussex' as a destination is problematic given that the boundary is not recognised from an administrative or geographical level, or indeed arguably from a branding level. Therefore, the question was asked at destination level. The results for each destination are presented in the tables below.

4.2.2 Key 'best things' coming out from visitor responses are shopping, beach, seafront/promenade, and castle (in reference to Arundel).

Table 26: Top 10 best things about Chichester (city)

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Compactness of city centre – easy to get from one side to another	8%

Table 27: Top 10 best things about Selsey

Beach	51%
Quiet	18%
Friendly	17%
Ambience	17%
Unspoilt/scenery/nature	16%
Shopping	10%
Easy to get to	9%
Quaint	7%
Variety of places to eat and drink	6%
Lots to do	6%

Table 28: Top 10 best things about Worthing

Seafront/Promenade	38%
Beach	38%
Pier	24%
Clean	20%
Shopping	18%
Quiet	15%
Variety of places to eat and drink	11%
Ambience	9%
Places to walk	9%
Easy to get to	9%

Table 29: Top 10 best things about Arundel

Castle	36%
History/culture	26%
Unspoilt/scenery/nature	20%
Architecture/buildings	19%
Lake/river/canal	17%
Quaint	15%
Variety of places to eat and drink	12%
Ambience	12%
Shopping	11%
Quiet	11%

Table 30: Top 10 best things about Bognor Regis

Beach	58%
Seafront/Promenade	18%
Clean	14%
Friendly	12%
Butlins	12%
Quiet	10%
Shopping	9%
Easy to get to	9%
Ambience	8%
Child/family friendly	8%

Table 31: Top 10 best things about Littlehampton

Beach	56%
Seafront/Promenade	12%
Friendly	10%
Clean	10%
Ambience	10%
Plenty of parking	10%
Easy to get to	10%
Child/family friendly	10%
Lake/river/canal	10%
Lots to do	8%

4.3 Worst things about the destination visited

4.3.1 Overall, a third of the sample of visitors (36%) responded to the question on what they thought were the worst things about the destination visited. However, this varied with the destination in question; 77% of Bognor Regis visitors and 70% of Littlehampton visitors mentioned negative aspects of the destination compared to only 9% of Worthing visitors and 17% of Arundel visitors.

4.3.2 Issues around parking such as its availability, ease of finding and charges, appears to be the main 'worst thing' about Chichester City, Worthing, Arundel and Littlehampton. Traffic congestion appears to be the main negative aspect encountered in Selsey and is the second worst thing associated with Chichester City and Arundel. The main criticism of

Bognor Regis was the perception that it is old fashioned, dated and shabby in parts of the town, and this was the second worst thing associated with Worthing.

Table 32: Top 10 worst things about Chichester (city)

Parking availability and charges	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive place to live and visit	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27 – getting here is difficult	5%

Table 33: Top 10 worst things about Selsey

Traffic	27%
One road in and out	20%
A27	13%
Parking (including charges)	11%
Decline in number of independent shops	7%
Too crowded	7%
Weather	5%
Dogs/dog mess on beach	5%
Too many restaurants/cafes/coffee shops	4%
Lack of good pubs and restaurants	4%

Table 34: Top 10 worst things about Worthing

Parking (including charges)	20%
Old fashioned/dated/shabby	14%
Stony beach	11%
Traffic	9%
Birds/mess	8%
Beggars/vagrants	7%
Funfair	7%
Cyclists not using cycle paths/speeding	7%
Weather	6%
Seaweed	6%

Table 35: Top 10 worst things about Arundel

Parking (including charges)	43%
Traffic	16%
Improve toilets	13%
Expensive	11%
Too crowded	5%
A27	5%
Decline in number of independent shops	3%
Lack of good pubs and restaurants	3%
Weather	3%
Uneven pavements	2%

Table 36: Top 10 worst things about Bognor

Old fashioned/dated/shabby	20%
Lack of good pubs and restaurants	16%
Improve toilets	14%
Decline in number of independent shops	11%
Parking (including charges)	9%
Stony beach	9%
Too many charity shops	8%
Traffic	4%
Not much nightlife	4%
Not enough for children/young people	4%

Table 37: Top 10 worst things about Littlehampton

Parking (including charges)	35%
Improve toilets	22%
Stony beach	9%
Decline in number of independent shops	6%
Old fashioned/dated/shabby	5%
Lack of good pubs and restaurants	4%
Expensive	4%
Birds/mess	4%
Funfair	4%
Not much to do	3%

4.4 Aspects most strongly associated with destinations

4.4.1 Given the significant differences in the product offer of the destinations in Coastal West Sussex, gleaning from visitors their views on what they most strongly associate with Coastal West Sussex as a destination it is own right is problematic. As with the question on the best and worst things, the question was asked at destination level.

4.4.2 The results were unsurprising. For Chichester City, the aspect most strongly associated with the city is the Cathedral and for Arundel it's the Castle.

4.4.3 Beach/coastline/seafront is the aspect visitors most strongly associate with Selsey, Worthing, Bognor and Littlehampton.

Table 38: Top 10 aspects most strongly located with Chichester (city)

The Cathedral	83%
Shopping	39%
Theatre	37%
Goodwood	36%
Heritage/History	34%
Parks & Open Spaces/Gardens	27%
Arts & Culture	17%
The street markets	16%
The University	15%
Events	5%

Table 39: Top 10 aspects most strongly located with Selsey

Beach/coastline/seafront	92%
Walking	31%
Warmth of welcome	30%
Countryside and picturesque villages	23%
Nature and wildlife	20%
Parks & Open Spaces/Gardens	10%
The Cathedral	9%
Heritage/History	9%
Fine local food and drink	9%
Cycling (leisurely non-competitive)	8%

Table 40: Top 10 aspects most strongly located with Worthing

Beach/coastline/seafront	90%
Pier	81%
Walking	35%
Ease of access/strong transport links connectivity	32%
Warmth of welcome	22%
Parks & Open Spaces/Gardens	18%
Fine local food and drink	17%
Shopping	16%
The street markets	10%
Heritage/History	7%

Table 41: Top 10 aspects most strongly located with Arundel

Castle	94%
Heritage/History	48%
Nature and wildlife	31%
The Cathedral	26%
Walking	24%
Parks & Open Spaces/Gardens	22%
Countryside and picturesque villages	22%
Fine local food and drink	21%
Shopping	13%
Warmth of welcome	12%

Table 42: Top 10 aspects most strongly located with Bognor Regis

Beach/coastline/seafront	90%
Walking	34%
Pier	28%
Parks & Open Spaces/Gardens	26%
Warmth of welcome	21%
Heritage/History	10%
Nature and wildlife	10%
Shopping	10%
The street markets	10%
Ease of access/strong transport links connectivity	10%

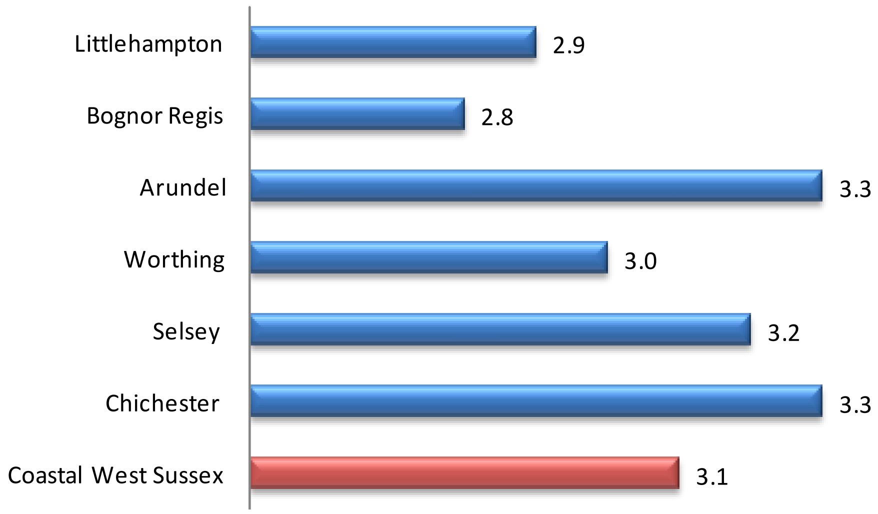
Table 43: Top 10 aspects most strongly located with Littlehampton

Beach/coastline/seafront	88%
Parks & Open Spaces/Gardens	34%
Walking	32%
Warmth of welcome	15%
Fine local food and drink	13%
Ease of access/strong transport links connectivity	12%
Countryside and picturesque villages	8%
Outdoor sports	7%
Watersports	6%
Nature and wildlife	6%

4.5 Visitor ratings on vibrancy of destinations

4.5.1 Another perception question posed to visitors was on the 'vibrancy' of the destination. Visitors were asked to rate the vibrancy of the destination visited on a scale of 1 to 5 where 1 depicts the destination as being 'Behind the times/old fashioned' and 5 depicts the destination as 'vibrant and cosmopolitan'. The scores have been merged to provide an overall Coastal West Sussex picture in addition to the individual results for each destination.

Figure 14: Vibrancy rating



4.5.2 The overall average rating score for Coastal West Sussex was 3.1 out of 5 - around the middle of the vibrancy scale. Results by destination reveal that Littlehampton and Bognor Regis are seen to be slightly less vibrant and cosmopolitan than the other destinations though none received a high score on vibrancy.

4.6 Visitor satisfaction rates

4.6.1 The survey sought to obtain the opinions of visitors on a range of indicators which together comprise the 'visitor experience'. Each indicator was rated on a scale of one to five, where 1='Very poor' (or the most negative response) amd 5='Very good' (or the most positive response), allowing satisfaction scores' (out of 5) to be calculated. The results are presented in the following sections.

Accommodation

4.6.2 Among visitors staying overnight in commercial accommodation in Coastal West Sussex, the majority described the range, quality and value for money of accommodation as 'Very good'.

Table 44: Satisfaction rating on accommodation

	Quality of service	Value for money
Base	311	311
Mean	4.5	4.4
Very poor	1%	2%
Poor	2%	3%
Average	8%	8%
Good	24%	25%
Very good	65%	62%

Visitor attractions & other places to visit

4.6.3 Visitors gave the range, quality and value for money of places to visit average scores of 4 out of 5. A significant proportion rated this aspect as 'Average'.

Table 45: Satisfaction rating on attractions and other places to visit

Residents	Range	Quality of service	Value for money
Base	1508	1508	1508
Mean	4.2	4.3	4.2
Very poor	0%	0%	1%
Poor	3%	1%	3%
Average	18%	14%	17%
Good	37%	38%	39%
Very good	41%	46%	40%

Places to Eat & Drink

4.6.4 Overall, around a half of all visitors rated the range, quality of service and value for money of places to eat and drink as ‘Very Good’.

Table 46: Satisfaction rating on places to eat and drink

Resident	Range	Quality of service	Value for money
Base	1619	1619	1619
Mean	4.4	4.4	4.3
Very poor	1%	0%	0%
Poor	3%	1%	3%
Average	11%	11%	15%
Good	31%	36%	37%
Very good	54%	51%	46%

Shops

4.6.5 A small but significant proportion of visitors scored the three aspects of shopping as ‘Average’. Overall, however, satisfaction was either ‘Good’ or ‘Very good’ among visitors.

Table 47: Satisfaction rating on shops

Resident	Range	Quality of shopping environment	Quality of service
Base	1536	1536	1536
Mean	4.1	4.1	4.2
Very poor	1%	1%	1%
Poor	7%	6%	4%
Average	18%	16%	15%
Good	33%	35%	39%
Very good	41%	42%	42%

Ease of finding way around

4.6.6 Visitor’s satisfaction ratings on road and pedestrian signage were broadly similar – with most providing scores of 4 and over (overall average score of 4.5 out of 5 for both).

Table 48: Satisfaction rating on ease of finding one’s way around

Resident	Road signs	Pedestrian signs
Base	1594	1543
Mean	4.5	4.5
Very poor	1%	0%
Poor	2%	2%
Average	6%	7%
Good	27%	28%
Very good	64%	63%

4.6.7 The mean satisfaction scores for each destination are presented in Table 49 overleaf.

Table 49: Mean average satisfaction score by destination

	Chichester	Selsey	Worthing	Arundel	Bognor	L'hampton
Visitor accommodation						
Range	4.4	4.6	4.3	4.4	4.6	4.7
Quality of service	4.4	4.6	4.1	4.3	4.2	4.4
Value for money	4.2	4.2	3.8	4.6	3.7	4.1
Visitor attractions and other places to visit:						
Range	4.2	4.2	3.8	4.6	3.7	4.1
Quality of service	4.4	4.2	4.0	4.7	3.9	4.1
Value for money	4.2	4.2	3.9	4.5	3.8	3.9
Places to Eat & Drink:						
Range	4.6	4.1	4.2	4.7	3.7	4.1
Quality of service	4.5	4.3	4.2	4.7	3.8	4.2
Value for money	4.3	4.2	4.1	4.7	3.8	4.1
Shops:						
Range	4.4	3.9	4.1	4.3	3.3	3.4
Quality of the shopping environment	4.5	4.1	3.9	4.3	3.4	3.5
Quality of service	4.5	4.1	4.0	4.3	3.6	3.6
Ease of finding way around:						
Road signs	4.5	4.6	4.4	4.7	4.5	4.3
Pedestrian signs	4.5	4.6	4.4	4.7	4.5	4.4

4.7 Overall trip enjoyment

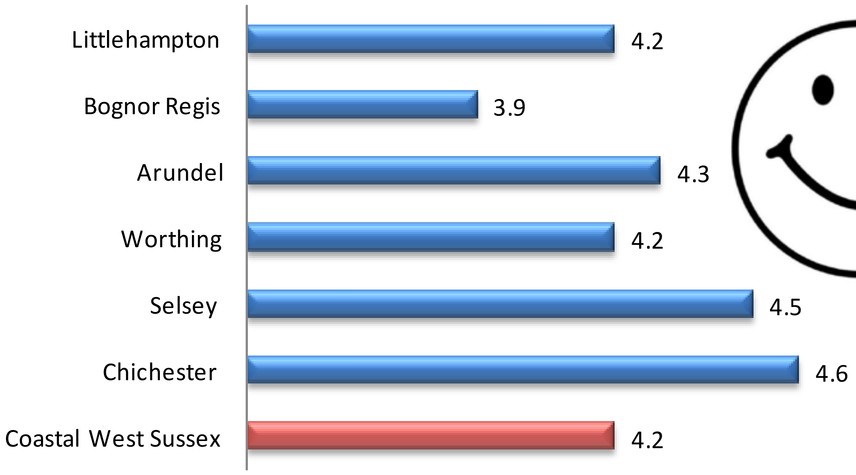
4.7.1 Overall trip enjoyment was relatively high. The average score for enjoyment at Coastal West Sussex level was 4.2.

4.7.2 Enjoyment was highest for Chichester and Selsy visitors.

Table 50: Overall trip enjoyment

Base	1899
Mean	4.2
Very low	0%
Low	0%
Average	12%
High	45%
Very high	34%

Figure 15: Overall trip enjoyment score



Overall trip enjoyment was high or very high for 79% of visitors

5 Appendices

5.1 Visitor residence tables

Table 51: Full list of UK visitor county of residence – all CWS

Base	1793
Sussex	33%
Surrey	15%
Hampshire	14%
London	6%
Kent	3%
Middlesex	3%
Berkshire	3%
Buckinghamshire	2%
Essex	2%
Hertfordshire	1%
Lancashire	1%
Oxfordshire	1%
Staffordshire	1%
Devon	1%
Wiltshire	1%
Dorset	1%
Gloucestershire	1%
Leicestershire	1%
Norfolk	1%
Somerset	1%
Cheshire	1%
West Yorkshire	1%
Glamorgan	0%
Northamptonshire	0%
Nottinghamshire	0%
Suffolk	0%
West Midlands	0%
Bedfordshire	0%
Cambridgeshire	0%
East Yorkshire	0%
County Fermanagh	0%
Derbyshire	0%
Shropshire	0%
South Yorkshire	0%
Warwickshire	0%
Isle of Wight	0%
Northumberland	0%
Cornwall	0%
County Durham	0%
North Yorkshire	0%
Lincolnshire	0%
Montgomeryshire	0%
Ayrshire	0%
Cumberland	0%
East Sussex	0%
Jersey	0%
Merseyside	0%
Renfrewshire	0%
Banffshire	0%
Berwickshire	0%
Carmarthenshire	0%
Ceredigion	0%
County Armagh	0%
County Down	0%
County Londonderry	0%

County of Herefordshire	0%
Denbighshire	0%
Dunbartonshire	0%
Edinburgh	0%
Essex	0%
Herefordshire	0%
Kinross-Shire	0%
Lanarkshire	0%
Monmouthshire	0%
Ross-shire	0%
Rutland	0%
Stirlingshire	0%
Swansea	0%
Worcestershire	0%
Total	**100%**

Table 52: Full list of UK visitor county of residence - Chichester

Base	462
Sussex	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%
Hertfordshire	1%
Dorset	1%
Essex	1%
Leicestershire	1%
Wiltshire	1%
Cheshire	0.4%
East Yorkshire	0.4%
Glamorgan	0.4%
Isle of Wight	0.4%
Lincolnshire	0.4%
Middlesex	0.4%
Bedfordshire	0.2%
Ceredigion	0.2%
County Armagh	0.2%
Cumberland	0.2%
Derbyshire	0.2%
Gloucestershire	0.2%
Kinross-Shire	0.2%
Norfolk	0.2%
Northamptonshire	0.2%
Northumberland	0.2%
Oxfordshire	0.2%
Ross-shire	0.2%
Somerset	0.2%
Suffolk	0.2%
Swansea	0.2%
West Yorkshire	0.2%
Total	100.0%

Table 53: Full list of UK visitor county of residence – Selsey

Base	195
Surrey	24%
Hampshire	17%
Sussex	10%
London	9%
Middlesex	9%
Berkshire	7%
Hertfordshire	3%
Buckinghamshire	3%
Kent	3%
Oxfordshire	3%
Suffolk	2%
Essex	2%
Dorset	1%
Wiltshire	1%
Cambridgeshire	0.5%
Carmarthenshire	0.5%
Derbyshire	0.5%
Devon	0.5%
Essex	0.5%
Lancashire	0.5%
Leicestershire	0.5%
Nottinghamshire	0.5%
Renfrewshire	0.5%
Somerset	0.5%
South Yorkshire	0.5%
Staffordshire	0.5%
Warwickshire	0.5%
Worcestershire	0.5%
Total	100%

Table 54: Full list of UK visitor county of residence – Worthing

Base	368
Sussex	29%
Surrey	19%
London	7%
Kent	4%
Hampshire	4%
Middlesex	3%
Berkshire	2%
Essex	2%
Lancashire	2%
Buckinghamshire	2%
West Yorkshire	2%
Norfolk	1%
Nottinghamshire	1%
Cheshire	1%
Devon	1%
Gloucestershire	1%
Hertfordshire	1%
Bedfordshire	1%
County Fermanagh	1%
Leicestershire	1%
Montgomeryshire	1%
Northamptonshire	1%
Oxfordshire	1%
Somerset	1%
Staffordshire	1%
Wiltshire	1%
Cornwall	1%
Dorset	1%
East Yorkshire	1%
Shropshire	1%

South Yorkshire	1%
Banffshire	0.3%
Berwickshire	0.3%
Cambridgeshire	0.3%
County Durham	0.3%
County Londonderry	0.3%
Derbyshire	0.3%
Dunbartonshire	0.3%
Edinburgh	0.3%
Glamorgan	0.3%
Herefordshire	0.3%
Lanarkshire	0.3%
Merseyside	0.3%
Monmouthshire	0.3%
North Yorkshire	0.3%
Renfrewshire	0.3%
Rutland	0.3%
Stirlingshire	0.3%
Warwickshire	0.3%
West Midlands	0.3%
Total	100%

Table 55: Full list of UK visitor county of residence – Arundel

Base	365
Sussex	38%
Hampshire	13%
Surrey	10%
Kent	5%
London	4%
Essex	3%
Berkshire	2%
Devon	1%
Gloucestershire	1%
Norfolk	1%
Staffordshire	1%
Buckinghamshire	1%
Dorset	1%
Glamorgan	1%
Hertfordshire	1%
Middlesex	1%
Somerset	1%
Cambridgeshire	1%
Cheshire	1%
Lancashire	1%
Northamptonshire	1%
West Midlands	1%
Cornwall	1%
County Durham	1%
County Fermanagh	1%
East Yorkshire	1%
Isle of Wight	1%
Leicestershire	1%
North Yorkshire	1%
Northumberland	1%
Suffolk	1%
Warwickshire	1%
Wiltshire	1%
County Down	0.3%
County of Herefordshire	0.3%
Cumberland	0.3%
Denbighshire	0.3%
Derbyshire	0.3%
East Sussex	0.3%

Lincolnshire	0.3%
Merseyside	0.3%
Nottinghamshire	0.3%
Oxfordshire	0.3%
Shropshire	0.3%
South Yorkshire	0.3%
Total	**100%**

Table 56: Full list of UK visitor county of residence – Bognor Regis

Base	192
Surrey	18%
Sussex	14%
London	11%
Hampshire	10%
Middlesex	6%
Berkshire	5%
Buckinghamshire	4%
Essex	4%
Kent	4%
Oxfordshire	4%
Lancashire	2%
Staffordshire	2%
Hertfordshire	2%
Shropshire	2%
West Midlands	2%
Bedfordshire	1%
Cambridgeshire	1%
Leicestershire	1%
Northumberland	1%
Somerset	1%
Wiltshire	1%
Cheshire	1%
County Durham	1%
County Fermanagh	1%
Derbyshire	1%
East Sussex	1%
East Yorkshire	1%
Glamorgan	1%
Gloucestershire	1%
Isle of Wight	1%
North Yorkshire	1%
Suffolk	1%
Warwickshire	1%
Grand Total	**100%**

Table 57: Full list of UK visitor county of residence – Littlehampton

Base	208
Sussex	34%
Surrey	25%
Hampshire	10%
London	7%
Middlesex	4%
Kent	3%
Berkshire	2%
Buckinghamshire	2%
West Yorkshire	1%
Jersey	1%
Oxfordshire	1%
South Yorkshire	1%
Ayrshire	0.5%
Bedfordshire	0.5%
Derbyshire	0.5%
Dorset	0.5%

Essex	0.5%
Hertfordshire	0.5%
Lancashire	0.5%
Northamptonshire	0.5%
Nottinghamshire	0.5%
Staffordshire	0.5%
Warwickshire	0.5%
West Midlands	0.5%
Wiltshire	0.5%
Total	**100%**

5.2 'Best' and 'worst' things tables

Table 58: Best things about Chichester (city)

Base	486
Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Compactness/easy to get to one end to another	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Quietness	7%
Parks and gardens	7%
Cleanliness of the city	6%
Quaintness of the city	6%
Safety/feel safe from crime in the city	4%
Theatre	4%
Nice place to live	3%
Easy to get to the city	3%
Markets	2%
Plenty of parking	2%
Places to walk	2%
University	1%
Street entertainment	1%
Cinema	1%
Good public transport	1%
Close to sea	1%
Unspoilt/scenery/nature	1%
Lake/river/canal	1%
Novium	<1%
Good cycle lanes	<1%
Sports centre/Gym	<1%
Good rail link	<1%
Flowers	<1%
No beggars	<1%
Plenty of toilets	<1%
Peregrines	<1%
Beach	<1%
Butlins	<1%
Mini golf/putting	<1%
Fresh air	<1%
Child/family friendly	<1%
Seating	<1%

Table 59: Best things about Selsey

Base	199
Beach	51%
Quiet	18%
Friendly	17%
Ambience	17%
Unspoilt/scenery/nature	16%
Shopping	10%
Easy to get to	9%
Quaint	7%
Variety of places to eat and drink	6%
Lots to do	6%
Choice of accommodation	6%
Seafront/Promenade	5%
Child/family friendly	4%
Clean	3%

Places to walk	2%
Not commercialised	2%
History/culture	1%
Nice place to live	1%
Parks and gardens	1%
Accessible/easy to get around	1%
Street entertainment	1%
Good public transport	1%
Close to sea	1%
Fresh air	1%
Dog friendly	1%
Lake/river/canal	1%
Funfair/arcades	1%
Seating	1%
Watching ships/harbour	1%
Swimming pool	1%

Table 60: Best things about Worthing

Base	396
Seafront/Promenade	38%
Beach	38%
Pier	24%
Clean	20%
Shopping	18%
Quiet	15%
Variety of places to eat and drink	11%
Ambience	9%
Places to walk	9%
Easy to get to	9%
Friendly	7%
Child/family friendly	5%
Lots to do	4%
Plenty of parking	4%
Fresh air	4%
Unspoilt/scenery/nature	4%
Funfair/arcades	3%
Parks and gardens	2%
Good cycle lanes	2%
Compact/small	2%
Quaint	2%
Flowers	2%
Seating	2%
Architecture/buildings	1%
Markets	1%
Safe	1%
Theatre	1%
Street entertainment	1%
Cinema	1%
Good public transport	1%
Mini golf/putting	1%
Tourist attractions	1%
Not commercialised	1%
Swimming pool	1%
Village feel/rural	1%

Table 61: Best things about Arundel

Base	405
Castle	36%
History/culture	26%
Unspoilt/scenery/nature	20%
Architecture/buildings	19%
Lake/river/canal	17%
Quaint	15%

Variety of places to eat and drink	12%
Ambience	12%
Shopping	11%
Quiet	11%
Lots to do	8%
Friendly	7%
Places to walk	5%
Plenty of parking	4%
Easy to get to	4%
Cathedral	3%
Clean	3%
Parks and gardens	3%
Safe	1%
Accessible/easy to get around	1%
Street entertainment	1%
Compact/small	1%
Close to sea	1%
Fresh air	1%
Child/family friendly	1%
Village feel/rural	1%

Table 62: Best things about Bognor Regis

Base	196
Beach	58%
Seafront/Promenade	18%
Clean	14%
Friendly	12%
Butlins	12%
Quiet	10%
Shopping	9%
Easy to get to	9%
Ambience	8%
Child/family friendly	8%
Unspoilt/scenery/nature	7%
Lots to do	6%
Places to walk	6%
Safe	4%
Quaint	4%
Fresh air	4%
Variety of places to eat and drink	3%
Plenty of parking	3%
Pier	3%
Parks and gardens	2%
History/culture	1%
Nice place to live	1%
Theatre	1%
Accessible/easy to get around	1%
Good cycle lanes	1%
Good public transport	1%
Compact/small	1%
Choice of accommodation	1%
Mini golf/putting	1%
Funfair/arcades	1%

Table 63: Best things about Littlehampton

Base	212
Beach	56%
Seafront/Promenade	12%
Friendly	10%
Clean	10%
Ambience	10%
Plenty of parking	10%
Easy to get to	10%
Child/family friendly	10%
Lake/river/canal	10%
Lots to do	8%
Places to walk	8%
Funfair/arcades	8%
Unspoilt/scenery/nature	7%
Quiet	6%
Variety of places to eat and drink	6%
Quaint	5%
Crabbing	4%
Safe	3%
Accessible/easy to get around	3%
Fresh air	3%
Shopping	2%
Nightlife	2%
Pedestrianised	1%
Tourist attractions	1%
Pier	1%
Seating	1%

Worst things about Chichester (city)

Base	322
Parking availability and costs	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27	5%
Not much to do	4%
Not enough for children/young people	3%
Lack of good pubs and restaurants	3%
Not enough public toilets	3%
Shops, cafes and pubs shut too early	3%
Not enough big name shops	3%
Lack of evening public transport	3%
Snobby/rude people	3%
Beggars/vagrants	2%
Youths hanging around	2%
Lack of signage	2%
Too many chain shops	2%
Litter	2%
Street markets	1%
Close streets to buses	1%
Train gates	1%
Too mnay modern buildings	1%
Old fashioned/dated/shabby	1%
No shade/shelter/seating	1%
Cyclists not using cycle paths/speeding	1%
Not enough bike racks	<1%
Unisex toilets	<1%

Lack of police presence	<1%
Flower boxes/parks need tidying	<1%
Sunday opening	<1%
No places for coaches to stop	<1%
Lack of cycle paths	<1%
Elderly population	<1%
Too touristy	<1%
No sports complex	<1%
Too many charity shops	<1%
Weather	<1%
Marina	<1%
Birds/mess	<1%
Noisy at night	<1%
Not wheelchair friendly	<1%

Table 64: Worst things about Selsey

Base	55
Traffic	27%
One road in and out	20%
A27	13%
Parking (including charges)	11%
Decline in number of independent shops	7%
Too crowded	7%
Weather	5%
Dogs/dog mess on beach	5%
Too many restaurants/cafes/coffee shops	4%
Lack of good pubs and restaurants	4%
Stony beach	4%
Building/road works	2%
Not much to do	2%
Shops, cafes and pubs shut too early	2%
Not enough big name shops	2%
Lack of evening public transport	2%
Expensive	2%
Youths hanging around	2%
Litter	2%
Old fashioned/dated/shabby	2%
No shade/shelter/seating	2%

Table 65: Worst things about Worthing

Base	36
Parking (including charges)	20%
Old fashioned/dated/shabby	14%
Stony beach	11%
Traffic	9%
Birds/mess	8%
Beggars/vagrants	7%
Funfair	7%
Cyclists not using cycle paths/speeding	7%
Weather	6%
Seaweed	6%
Decline in number of independent shops	5%
Building/road works	3%
Not much nightlife	3%
Not much to do	3%
Too crowded	3%
Flower boxes/parks need tidying	3%
Lack of signage	3%
Litter	3%
Close streets to buses	2%
Pier is a let down	2%
Lack of good pubs and restaurants	1%
Not enough public toilets	1%

Uneven pavements	1%
Shops, cafes and pubs shut too early	1%
Not enough big name shops	1%
Lack of evening public transport	1%
Expensive	1%
Youths hanging around	1%
Sunday opening	1%
A27	1%
Elderly population	1%
Improve toilets	1%
Need more coffee shops on beach	1%
Marina	1%
Dogs/dog mess on beach	1%
Too small	1%
Lack of affordable accommodation	1%
Brambles	1%
Wasps	1%

Table 66: Worst things about Arundel

Base	70
Parking (including charges)	43%
Traffic	16%
Improve toilets	13%
Expensive	11%
Too crowded	5%
A27	5%
Decline in number of independent shops	3%
Lack of good pubs and restaurants	3%
Weather	3%
Uneven pavements	2%
Lack of signage	2%
Litter	2%
Old fashioned/dated/shabby	2%
Not much nightlife	1%
Not much to do	1%
Not enough public toilets	1%
Cinema too expensive	1%
Shops, cafes and pubs shut too early	1%
Not enough big name shops	1%
Lack of evening public transport	1%
Lack of police presence	1%
Too touristy	1%
Too many charity shops	1%
One road in and out	1%
Dogs/dog mess on beach	1%
Too small	1%
Birds/mess	1%
No shade/shelter/seating	1%
Not pedestrian friendly	1%
Not dog friendly	1%
Southern Rail	1%
Moat is dirty	1%
Not wheelchair friendly	1%
Wasps	1%

Table 67: Worst things about Bognor Regis

Base	151
Old fashioned/dated/shabby	20%
Lack of good pubs and restaurants	16%
Improve toilets	14%
Decline in number of independent shops	11%
Parking (including charges)	9%
Stony beach	9%
Too many charity shops	8%
Traffic	4%
Not much nightlife	4%
Not enough for children/young people	4%
Snobby/rude people	4%
Need more coffee shops on beach	4%
Pier is a let down	4%
Not enough big name shops	3%
Expensive	3%
Not much to do	1%
Not enough public toilets	1%
Uneven pavements	1%
Cinema too expensive	1%
Beggars/vagrants	1%
Lack of evening public transport	1%
Too many modern buildings	1%
Litter	1%
One road in and out	1%
Dogs/dog mess on beach	1%
Too small	1%
Birds/mess	1%
No shade/shelter/seating	1%
Funfair	1%
Cyclists not using cycle paths/speeding	1%
Not dog friendly	1%
Southern Rail	1%

Table 68: Worst things about Littlehampton

Base	148
Parking (including charges)	35%
Improve toilets	22%
Stony beach	9%
Decline in number of independent shops	6%
Old fashioned/dated/shabby	5%
Lack of good pubs and restaurants	4%
Expensive	4%
Birds/mess	4%
Funfair	4%
Not much to do	3%
Too crowded	3%
Beggars/vagrants	3%
Weather	3%
Cyclists not using cycle paths/speeding	3%
Not dog friendly	3%
Traffic	1%
Building/road works	1%
Not much nightlife	1%
Uneven pavements	1%
Close streets to buses	1%
Too many chain shops	1%
Litter	1%
Need more coffee shops on beach	1%
No shade/shelter/seating	1%
Seaweed	1%

5.3 Aspects most strongly associated with destination tables

Table 69: Aspects most strongly located with Chichester (city)

Base	486
The Cathedral	83%
Shopping	39%
Theatre	37%
Goodwood	36%
Heritage/History	34%
Parks & Open Spaces/Gardens	27%
Arts & Culture	17%
The street markets	16%
The University	15%
Events	5%
Nightlife	4%
Outdoor sports	2%
Other	1%

Table 70: Aspects most strongly located with Selsey

	199
Beach/coastline/seafront	92%
Walking	31%
Warmth of welcome	30%
Countryside and picturesque villages	23%
Nature and wildlife	20%
Parks & Open Spaces/Gardens	10%
The Cathedral	9%
Heritage/History	9%
Fine local food and drink	9%
Cycling (leisurely non-competitive)	8%
Water sports	7%
Shopping	5%
Ease of access/strong transport links connectivity	5%
Events	4%
Outdoor sports	4%
The street markets	3%
Arts & Culture	2%
Nightlife	2%
Vibrant and cosmopolitan towns	2%
Pier	2%

Table 71: Aspects most strongly located with Worthing

	396
Beach/coastline/seafront	90%
Pier	81%
Walking	35%
Ease of access/strong transport links connectivity	32%
Warmth of welcome	22%
Parks & Open Spaces/Gardens	18%
Fine local food and drink	17%
Shopping	16%
The street markets	10%
Heritage/History	7%
Events	7%
Countryside and picturesque villages	6%
Cycling (leisurely non-competitive)	6%
Arts & Culture	4%
Nature and wildlife	3%
Watersports	3%
Nightlife	3%
Vibrant and cosmopolitan towns	2%
Outdoor sports	1%

Table 72: Aspects most strongly located with Arundel

Base	405
Castle	94%
Heritage/History	48%
Nature and wildlife	31%
The Cathedral	26%
Walking	24%
Parks & Open Spaces/Gardens	22%
Countryside and picturesque villages	22%
Fine local food and drink	21%
Shopping	13%
Warmth of welcome	12%
Arts & Culture	10%
Events	7%
The street markets	5%
Ease of access/strong transport links connectivity	3%
Beach/coastline/seafront	2%
Outdoor sports	2%
Cycling (leisurely non-competitive)	1%
Watersports	1%
Vibrant and cosmopolitan towns	1%

Table 73: Aspects most strongly located with Bognor Regis

	196
Beach/coastline/seafront	90%
Walking	34%
Pier	28%
Parks & Open Spaces/Gardens	26%
Warmth of welcome	21%
Heritage/History	10%
Nature and wildlife	10%
Shopping	10%
The street markets	10%
Ease of access/strong transport links connectivity	10%
Fine local food and drink	9%
Countryside and picturesque villages	7%
Events	7%
Watersports	6%
Nightlife	6%
Cycling (leisurely non-competitive)	4%
Outdoor sports	3%
Vibrant and cosmopolitan towns	2%
Arts & Culture	1%

Table 74: Aspects most strongly located with Littlehampton

Base	212
Beach/coastline/seafront	88%
Parks & Open Spaces/Gardens	34%
Walking	32%
Warmth of welcome	15%
Fine local food and drink	13%
Ease of access/strong transport links connectivity	12%
Countryside and picturesque villages	8%
Outdoor sports	7%
Watersports	6%
Nature and wildlife	6%
Pier	6%
Events	5%
The street markets	5%
Heritage/History	5%
Cycling (leisurely non-competitive)	4%
Vibrant and cosmopolitan towns	3%

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TSE RESEARCH

Coastal West Sussex Tourism Research Project 2016

Non-Visitor Survey Report of Findings

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June 2016

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Contents

Acknowledgements

We would like to thank Chichester District Council, Arun District Council and Worthing District Council in supplying images of Coastal West Sussex.

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1 Introduction

1.1 Aims and objectives of survey

1.1.1 The key aim of the non-visitor research is to identify what the key ‘hooks’ are to encourage more visits among target consumer markets. Once this is known, marketing promotions and campaigns can be more effectively tailored to their susceptibility and receptivity to certain messages, imagery, and communication mediums.

1.1.2 Research was carried out into non-visitors to explore current levels of awareness of Coastal West Sussex destinations and their perceptions of them, and to establish their interest/disinterest in future visits.

1.1.3 The key objectives and outcomes were as follows:

Key objectives:	*Key outcomes:*
• Measure awareness and perceptions that potential visitors have of Coastal West Sussex’s tourism product offer • Measure interest in visiting destinations in Coastal West Sussex following exposure to its marketing materials.	Produce data that will improve the marketing of Coastal West Sussex to potential visitors. By better understanding the visiting behaviours of non-visitors, the destinations can be marketed in ways that suit the holiday /short break preferences of potential users.

1.2 Survey approach

1.2.1 A very quick and relatively low cost means of accessing a readily available pool of non-visitors is to use an online survey panel. Alternative methods such as street surveys, postal and telephone surveys with a sample of non-visitors have a much lengthier turnaround and are more expensive to design and deliver.

1.2.2 An online panel is a pre-recruited group of individuals who have agreed to take part in online market research surveys. Respondents are carefully screened to ensure that samples are both representative of the population and are extensively profiled to efficiently target particular market segments, in our case people who have not previously visited Coastal West Sussex or who have not visited for many years.

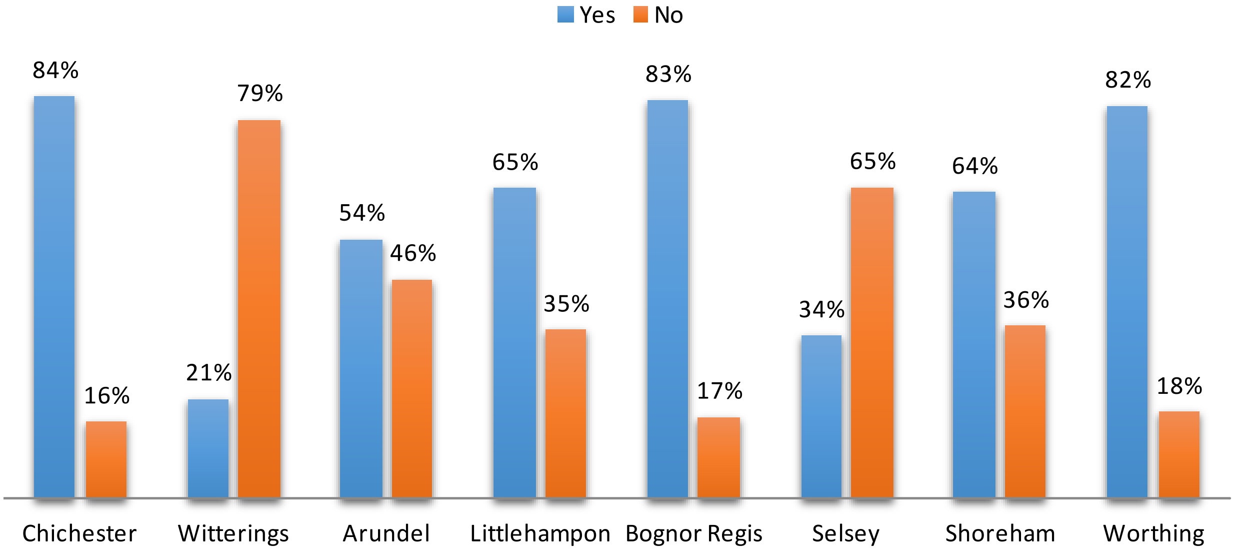
1.2.3 Between 30 May and 3 June 2016, 500 non-visitors took part in an online survey.

2 Survey results

2.1 Awareness of Coastal West Sussex

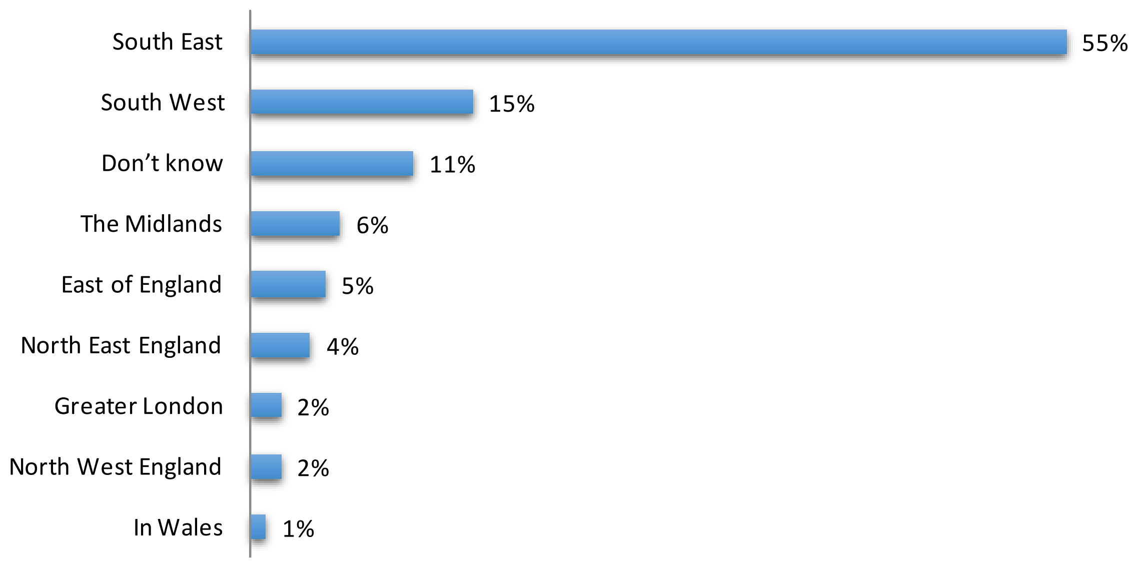
2.1.1 Awareness is strongest for Chichester, Bognor Regis and Worthing.

Figure 1: Whether heard of Coastal West Sussex destinations



2.1.2 Knowledge of the region in which the destinations are based is relatively low. Just over half correctly identified the region as the South East.

Figure 2: Where in UK they think Coastal West Sussex is located



2.2 Awareness of Coastal West Sussex by region of residence

2.2.1 Results on awareness of Coastal West Sussex destinations by respondents from the different regions reveal that generally awareness is lowest for The Witterings and Selsey. Awareness of The Wittering is lowest among non-visitors living in West Midlands, East Anglia and London. Awareness of Selsey is lowest among non-visitors living in the North East, South West and London.

2.2.2 As might be expected awareness is generally higher among those living in the South East compared to the other regions, particularly for Bognor Regis and Chichester. However, the proportion of the region's residents who have awareness is not a high as one may expect. The survey found that over two thirds are not aware of The Witterings, around half have never heard of Selsey and around a third are unaware of Arundel, Littlehampton and Shoreham.

Figure 3: Awareness of Chichester by region

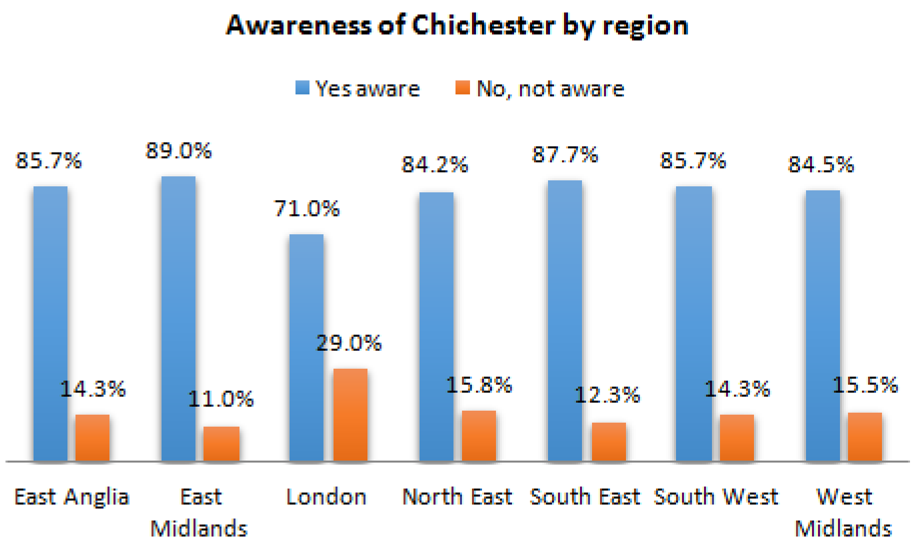


Figure 4: Awareness of The Witterings by region

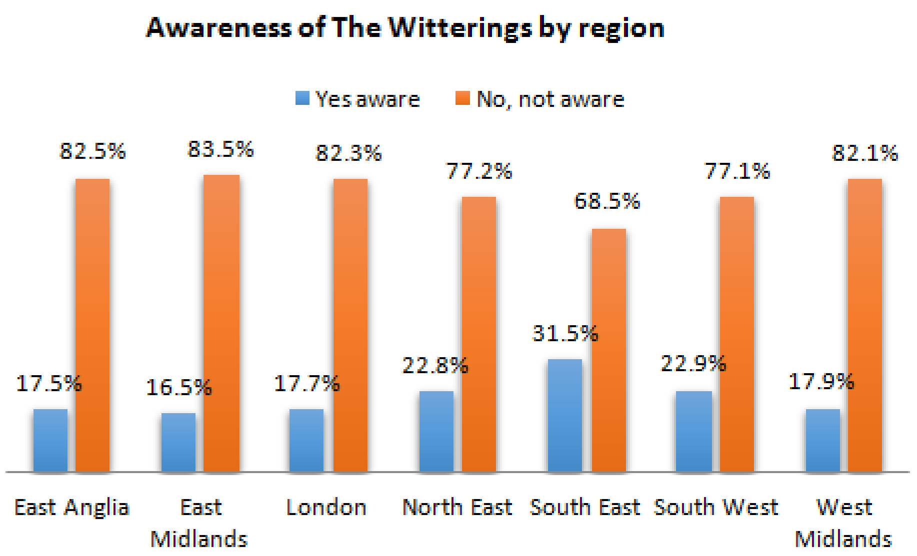


Figure 5: Awareness of Arundel by region

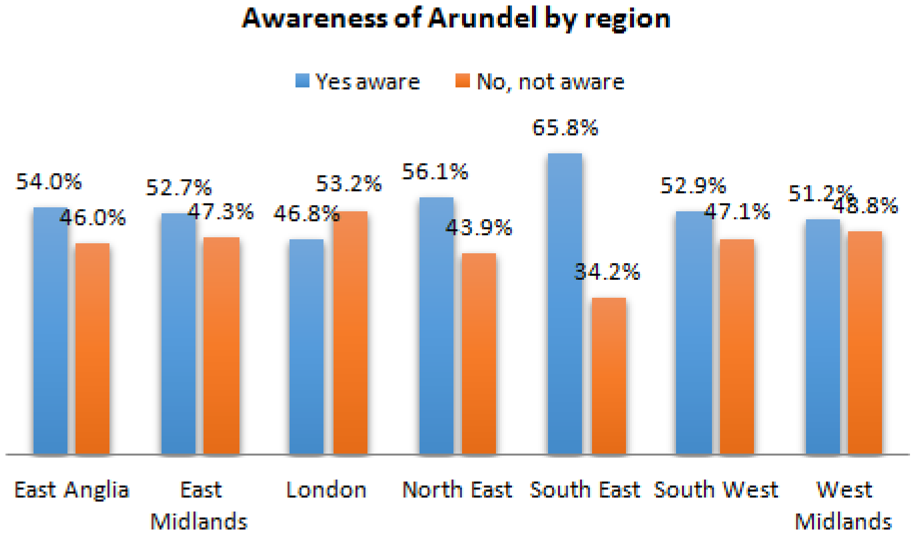


Figure 6: Awareness of Littlehampton by region

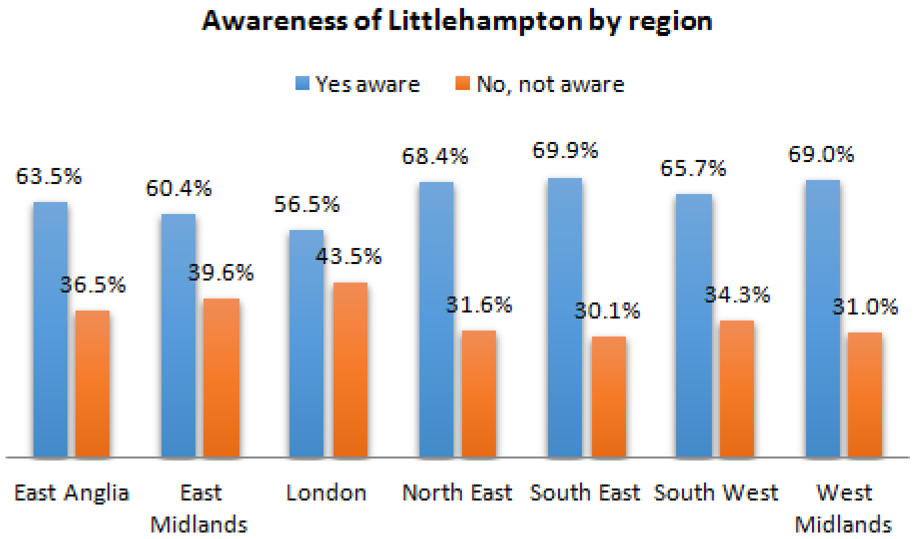


Figure 7: Awareness of Bognor Regis by region

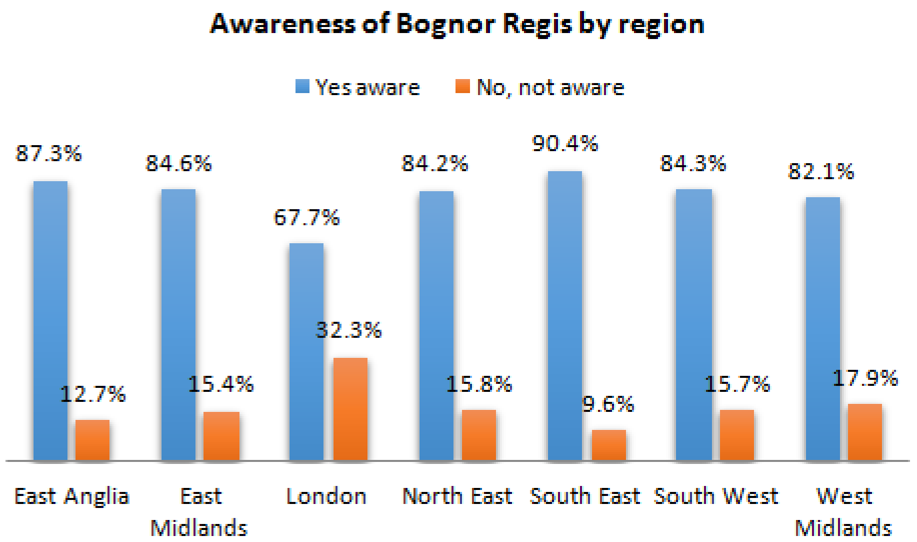


Figure 8: Awareness of Selsey by region

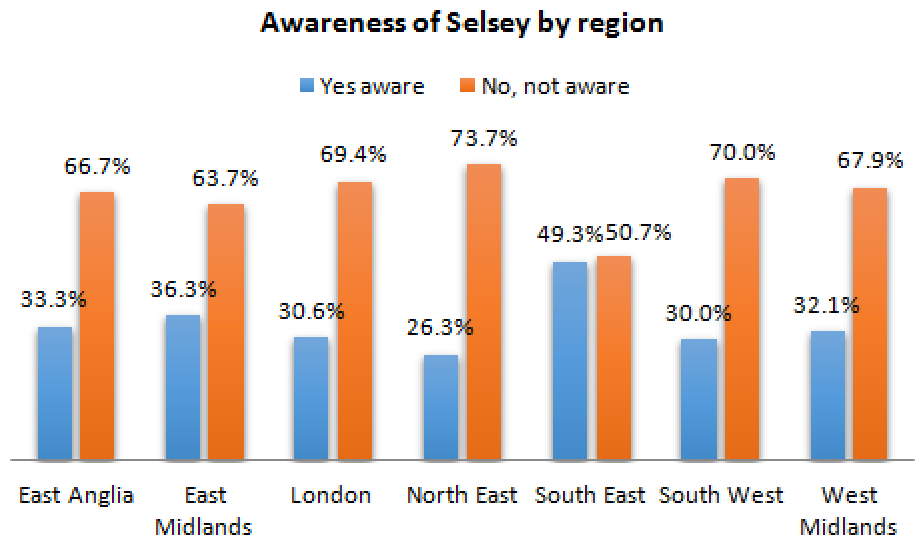


Figure 9: Awareness of Shorham by region

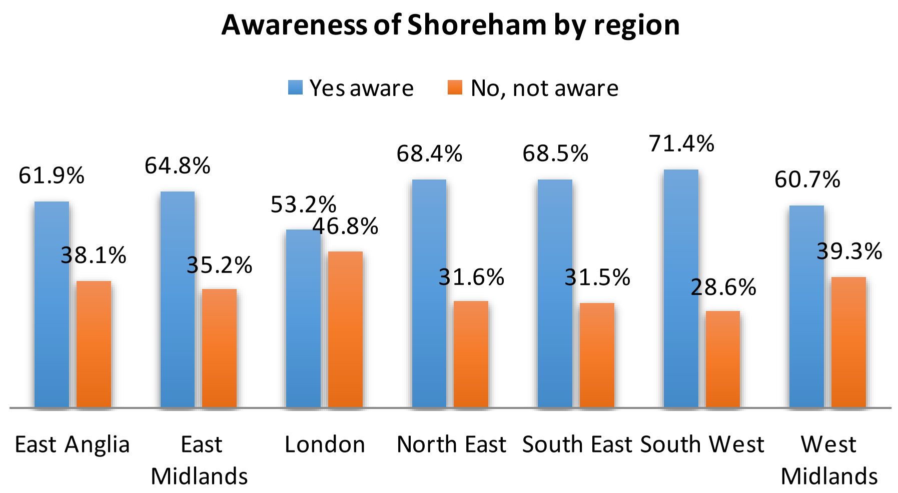
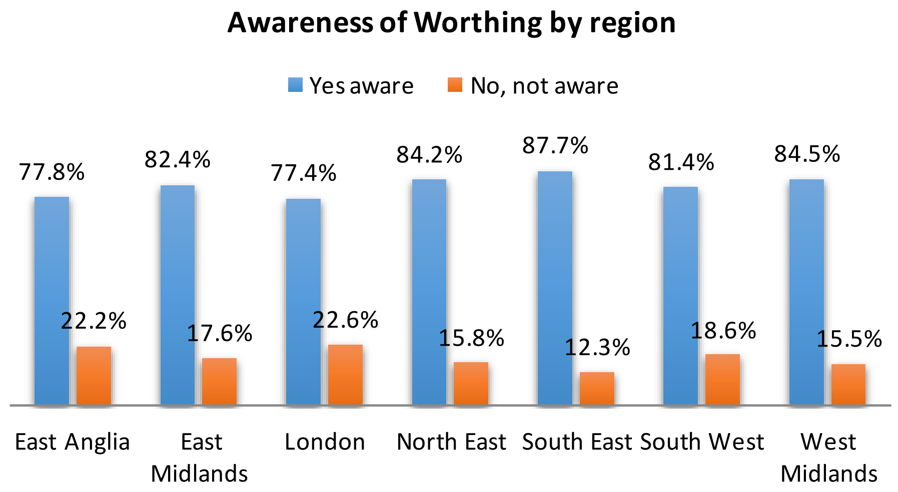


Figure 10: Awareness of Worthing by region



2.2.3 The results reveal that respondents living in London are generally less knowledgeable about the region Coastal West Sussex is located in.

Table 1: Where in UK Coastal West Sussex beleived to be located by respondent region of residence

	Respondent region of residence						
Regions CWS located	East Anglia	East Midlands	London	North East	South East	South West	West Midlands
In the North West England	0%	3%	2%	2%	3%	1%	1%
In the North East England	6%	4%	2%	9%	1%	3%	2%
In the Midlands	2%	8%	3%	4%	4%	6%	12%
East of England	10%	2%	0%	5%	5%	9%	4%
In the South East	**52%**	**57%**	**42%**	**46%**	**74%**	**60%**	**48%**
In the South West	11%	12%	11%	28%	7%	17%	19%
In London	0%	0%	13%	2%	0%	0%	1%
In Scotland	0%	0%	2%	2%	0%	0%	1%
In Wales	0%	1%	5%	0%	1%	0%	0%
In Ireland	0%	0%	0%	0%	0%	0%	0%
Don't know	19%	12%	21%	4%	4%	4%	12%

2.3 Perceptions of Coastal West Sussex

2.3.1 After non-visitors were presented with a number of images of places of interest, they were asked to state their agreement or disagreement with a number of statements reflecting destination propositions of the area.

Figure 11: Images respondents were exposed to

Note: Names of places were not identified in the survey.

2.3.2 The majority of visitors agreed with the statements. The aspects which received a greater level of disagreement concerned the statement ‘Coastal West Sussex looks like a great place for an action packed activity holiday/break’ (29% either strongly disagreed or disagreed), and the statement ‘Coastal West Sussex looks like a great place for a day visit rather than an overnight stay’ (39% either strongly disagreed or disagreed), indicating that many saw the area as a place to visit for an overnight stay, though a significant proportion replied ‘Don’t know/not sure’.

Coastal West Sussex looks like a great place for a relaxing short break with a partner	
Strongly disagree	2%
Disagree	2%
Agree	**66%**
Strongly agree	**27%**
Don't know/not sure	3%

Coastal West Sussex looks like a great place for an action packed activity holiday/break	
Strongly disagree	2%
Disagree	27%
Agree	**50%**
Strongly agree	**12%**
Don't know/not sure	9%

Coastal West Sussex looks like a great place to immerse yourself in the areas rich culture and heritage	
Strongly disagree	1%
Disagree	7%
Agree	**60%**
Strongly agree	**25%**
Don't know/not sure	7%

Coastal West Sussex looks like a great place to enjoy the cosmopolitan atmosphere with quirky places	
Strongly disagree	1%
Disagree	15%
Agree	**57%**
Strongly agree	**19%**
Don't know/not sure	8%

Coastal West Sussex looks like a great place for a family beach holiday/break with lots of things to do and see	
Strongly disagree	2%
Disagree	6%
Agree	**56%**
Strongly agree	**32%**
Don't know/not sure	5%

Coastal West Sussex looks like a great place for water sports of all kinds	
Strongly disagree	3%
Disagree	17%
Agree	**50%**
Strongly agree	**15%**
Don't know/not sure	14%

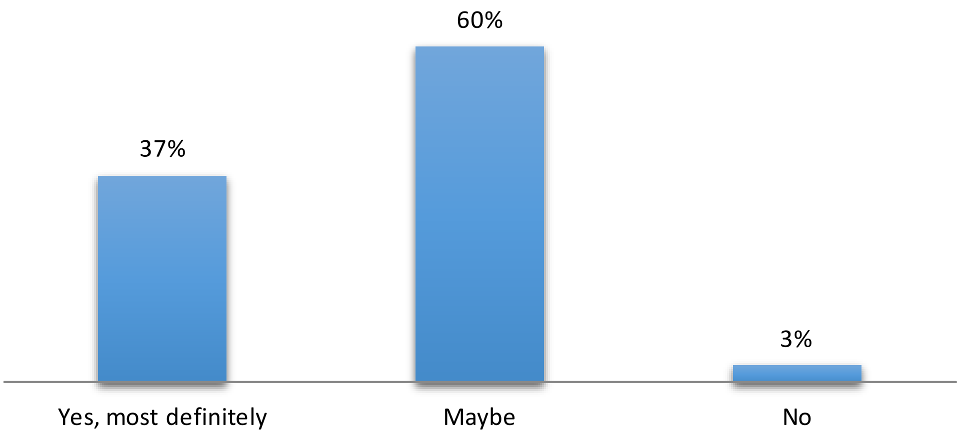
Coastal West Sussex looks like a great place for walking or cycling, enjoying stunning countryside/coastline	
Strongly disagree	0%
Disagree	3%
Agree	**60%**
Strongly agree	**31%**
Don't know/not sure	5%

Coastal West Sussex looks like a great place for a day visit rather than an overnight stay	
Strongly disagree	5%
Disagree	34%
Agree	**41%**
Strongly agree	**0%**
Don't know/not sure	11%

2.4 Interest in visiting of Coastal West Sussex

2.4.1 Having reviewed images of Coastal West Sussex, non-visitors were asked about their interest in visiting in the near future. Almost 4 in 10 non-visitors (37%) stated that they were definitely interested in visiting and just under two-thirds (60%) stated that they might be interested in visiting. Only a small minority of 3% of non-visitors stated that they would not be interested in visiting at all in the future.

Figure 12: Interest in visiting Coastal West Sussex



2.4.2 The reasons for wanting to visit Coastal West Sussex clearly highlight the dominance of the beach based activities and attractive coastline. Key words mentioned were most often 'Beaches' and 'Seaside'.

Reasons for wanting to visit	Proportion
Beaches/seaside based activities / Beautiful coastal scenery	40%
Combination of beautiful countryside and stunning beaches	15%
Lots of things to do and see	13%
Quaint and picturesque towns/villages to explore	11%
Attractive historic sites of interest	8%
Looks like great place to relax and unwind	3%
Scenic countryside	3%
Easy to get to	3%
Great for families	3%
Arundel Castle	1%
Looks authentic, unspoilt	1%
Total	100%

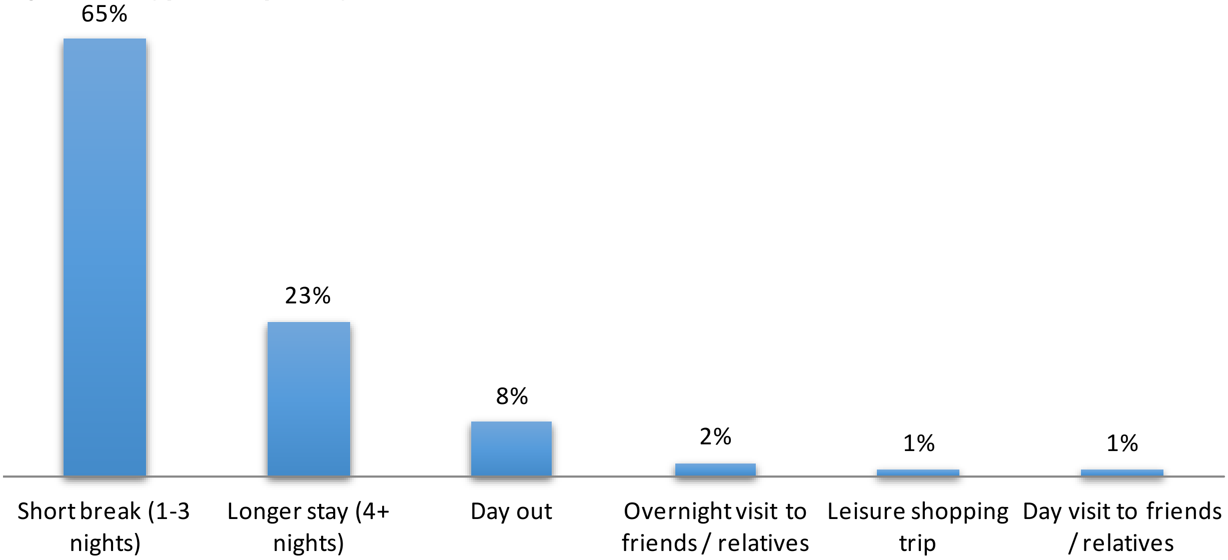
2.4.3 For the minority of non-visitors who stated that they had no interest in visiting, the vast majority replied that they simply preferred visiting other places in the UK or that they felt the destinations were too far to travel to.

2.4.4 Given these reasons, there were no particular factors or incentives which could be offered to encourage them to visit.

2.5 Type of trip likely to be taken

2.5.1 Among non-visitors expressing an interest in visiting, two-third stated that a future visit would most likely be a short break

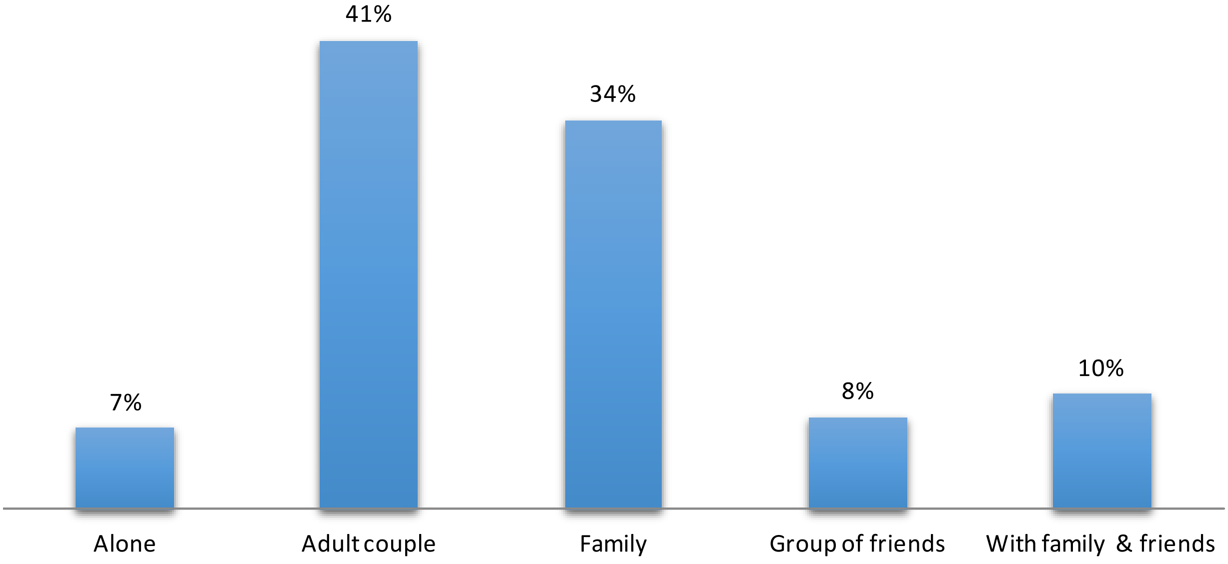
Figure 13: Type of trip likely to be taken



2.6 Group composition of future trips

2.6.1 Most future trips would be taken with another adult (most often a spouse), or as a family.

Figure 14: Who future visits will be taken with



Appendix 1: Respondent profile

Q2. Which region do you live in?

1 East Anglia	13%
2 East Midlands	18%
3 London	12%
4 North East	11%
8 South East	15%
9 South West	4%
11 West Midlands	17%

Q3. Into which of these age groups do you fall?

1 18-24	12%
2 25-34	25%
3 35-44	18%
4 45-54	18%
5 55-64	22%
6 65-74	3%

Q4. Just to confirm, are you..?

1 Male	37%
2 Female	63%

Q5. Which of the following categories applies to the highest income earner in your household?

1 Employed full-time (30+ hours per week)	55%
2 Employed part-time (8-29 hours per week)	12%
3 Self-employed	6%
4 Retired with company/private pension	8%
5 Retired with state pension ONLY	1%
6 Unemployed - less than 6 months	1%
7 Unemployed - over 6 months	6%
8 Working less than 8 hrs per week	2%
9 Full-time student	4%
10 I would prefer not to answer this question	4%

Q1. Which coastal destinations do you usually visit/think of in the UK when looking for a short break or holiday ?

Devon	28%
Cornwall	13%
Scarborough	11%
Dorset	6%
Brighton	6%
Bournemouth	5%
Skegness	4%
Southend	4%
Great Yarmouth	3%
Lake district	3%
North Wales	3%
Tenby	3%
Blackpool	2%
Kent coast	2%
Weston super mare	2%
Whitby	2%
Broadstairs	1%
Cotswolds	1%
Portsmouth/Southsea	1%
Suffolk	1%

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TSE RESEARCH

Coastal West Sussex Tourism Research Project 2016

Postcode Segmentation Analysis

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May 2016

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1 Introduction

1.1 2014-15 visitors data analysis

1.1.1 This analysis of Coastal West Sussex visitors is based on postcodes which have been collected from multiple visitor enquiry databases during 2014 - 2016. These are:

- 2014: Visit Chichester fulfilment request postcodes
- 2015/16: Brochure request for Worthing postcodes
- 2015/16: Brochure request for Arun postcodes
- 2016: Bunn Leisure visitor postcodes
- 2016: Goodwood visitor postcodes

1.1.2 A list of postcodes from people who have enquired about places to visit/places to stay in the area, cannot of course tell us whether they actually visited. However, the visitor enquiry database can be used to gain an understanding of which consumer segments are showing an interest in Coastal West Sussex visitors and what part of the country they live in. These findings are useful in decision around which new markets to target and the potential size of this market.

1.2 Note on data and levels of reporting

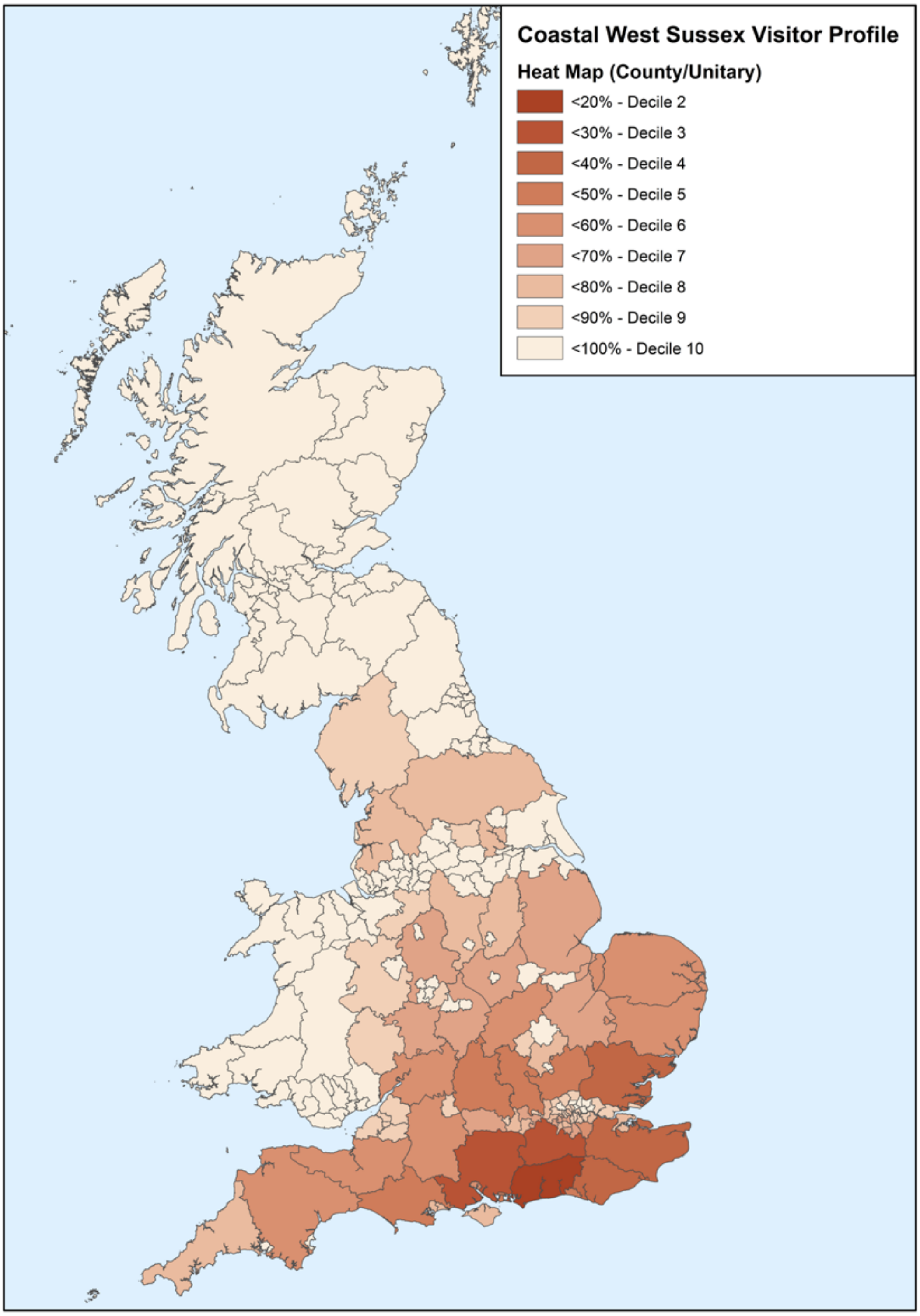
1.2.1 193,872 visitor enquirer postcodes were recorded by attractions and visitor centres across West Sussex. Of those records, 191,317 (98.7% of all collected postcodes) were able to be matched to the Mosaic socio-geodemographic profiling tool for analysis. The remaining 1.3% of records were unusable as a result of being incomplete, obsolete or incorrectly reported/recorded.

2 Mapping

2.1 Distribution of enquirers

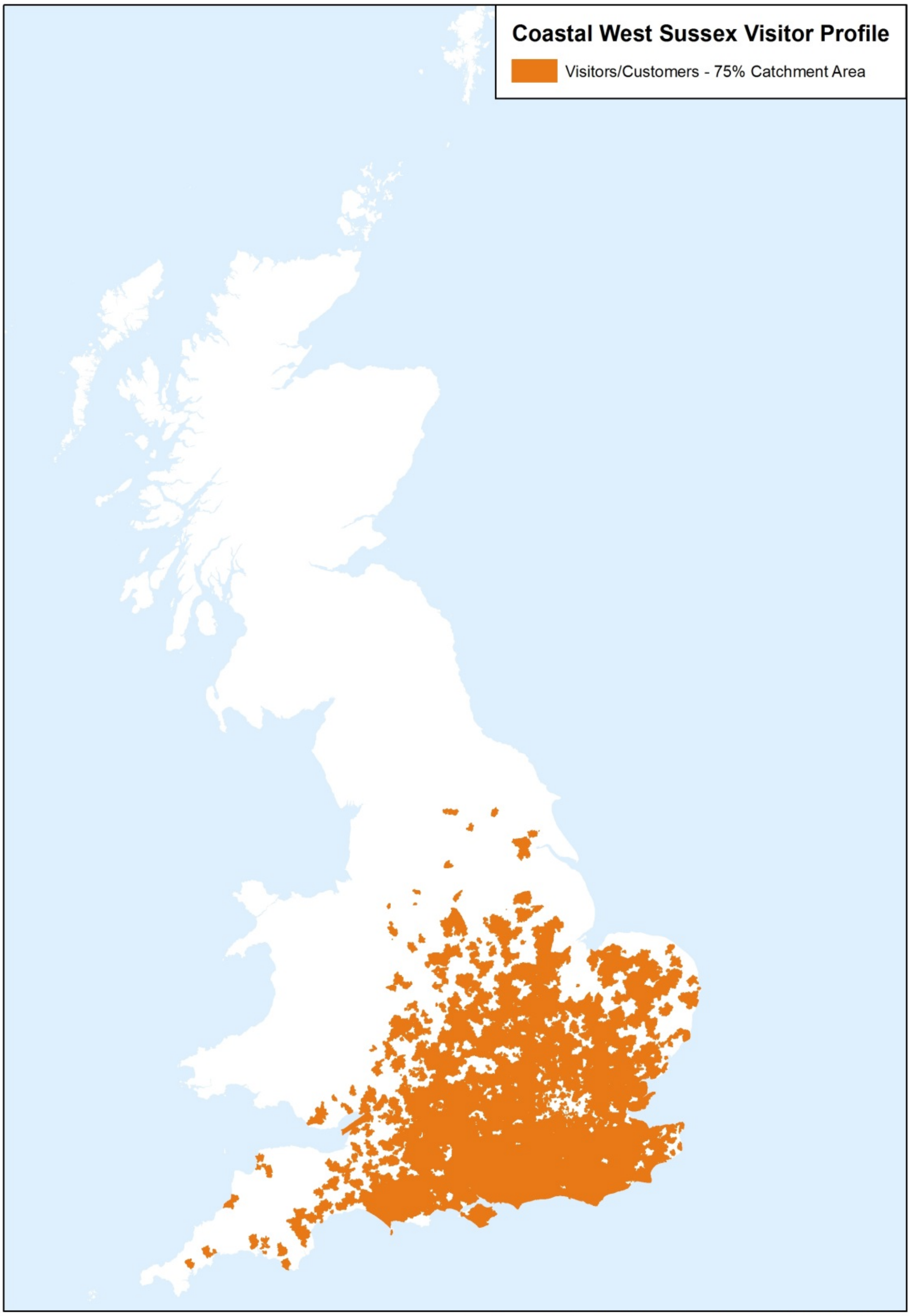
2.1.1 This map shows a visual representation of the market penetration of all surveyed visitors during 2014 - 2015 with a fully completed, valid postcode. The postal sectors with a greater count of visitors highlight with darker red and those with zero visitors show as white.

Figure 1: Coastal West Sussex Visitors: Postal Sector (Heat Map)



2.1.2 The map below shows the catchment area defined by plotting the core distribution of the uppermost 75% of all visitors during 2014 – 2015 with a fully completed, valid postcode. This is represented via postal sectors.

Figure 2: Coastal West Sussex Visitors: 75% Catchment Map



3 Mosaic profile

3.1 Core Mosaic group types

3.1.1 Overall analysis of the mosaic profiling shows that 3 groups stand out when it comes to visitor numbers to Coastal West Sussex; Prestige Positions (17%), Country living (13%) and Domestic Success (13%). These groups boast the majority of the total visitors to the region and are significantly over-represented when one compares this data with the base percentage figures of these respective groups. For example, Country Living only accounts for 6% of the UK population yet 13% make up those who visited Coastal West Sussex. Therefore, there exists a higher propensity to visit than the average catchment area resident.

3.1.2 Prestige Positions accounts for 17% of the target market for those visiting the West Sussex region and thus commands a substantial index of 246. Within this group exists 2 sub-types which are relatively prominent when it comes to visitor numbers - ‘Diamond Days’ and ‘Alpha Families’. These mosaic types are characterised by significant wealth and people who go on multiple holidays; ‘Diamond Days’ are predominantly retired with no children and have a wide range of investments, whilst ‘Alpha Families’ tend to be slightly younger. Once again, there is a greater than average tendency to visit Coastal West Sussex.

3.1.3 ‘Country Living’ is another group which commands a high proportion of the target count, producing an index figure of 217. Within this group exists the mosaic type ‘Wealthy Landowners’, boasting a target count of 7% (from a base figure of 2%). This further adds to the notion that the Coastal West Sussex region is attracting wealthy visitors who see the area as a prime spot to visit for a short break.

3.1.4 ‘Domestic Success’ also commands a relatively large portion of the target count (13%) for this region, with an index figure of 160 produced for this group. With its base count (8%) significantly smaller than its target, there is a higher than average propensity for visitors who appear under this profile to visit Coastal West Sussex. These people are likely to be high earning families who live affluent lifestyles in upmarket homes, which boast excellent commuter links to the capital. Tending to be professionals who are have young children but also intent on following a career path, this ties in with the notion that this group are likely to be working in London. Within this mosaic group exists the ‘Cafes and Catchments’ and are expected to be earning in the region of £70-90k per annum (combined), whilst they’d be working either in property, financial services, IT or professional services. ‘Thriving Independence’ is another mosaic type which has a higher than average tendency to visit the area, with its base count half of what its target count is. They also have a strong tendency to take multiple short breaks.

Key Findings

Top 3 Mosaic Groups (B, C, and G) contribute to 43% (80,962) of the total visitor numbers within the sample. All of these groups equate to 5,812,214 households within the UK.

Top 10 Mosaic Types – equate to 39% (73,602) of the total visitor numbers and 18% (5,068,101) of households within the UK.

Group B – Prestige Positions at 31,427 are the most engaged group, providing the highest percentage of those visitor numbers (17%) and are over represented within the catchment area by 10% (base figure of 7%).

Type C10 – Wealthy Landowners provide 7% (12,925) of the total visitor numbers, which is the greatest of any of the mosaic types.

Types C10 (Wealth Landowners) and C13 (Village Retirement) - feature within the top 5 Mosaic types and command a combined total of 11% of the target count.

Attracting wealthy visitors who see West Sussex as a prime spot to visit for a short break

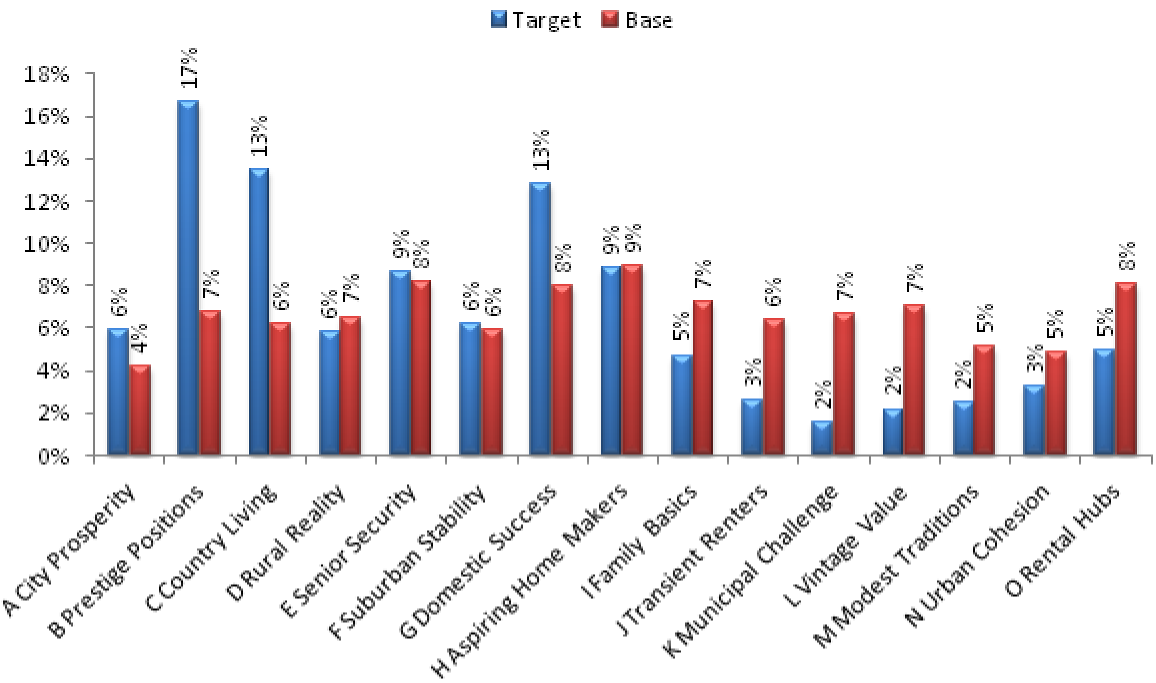
3.1.5 With appropriately designed marketing communications delivered through their preferred communications channels, Mosaic Groups B, C & G will more than likely yield the greatest return on investment based on the current visitors to Coastal West Sussex.

Figure 3: Core Mosaic Group types found in Coastal West Sussex

Mosaic Groups	Target		Base		Comparison	
Group Name	Count	%	Count	%	Penetration %	Index
A City Prosperity	11,067	6%	1,170,299	4%	1%	139
B Prestige Positions	31,427	17%	1,879,451	7%	2%	246
C Country Living	25,405	13%	1,716,369	6%	1%	217
D Rural Reality	10,895	6%	1,802,862	7%	1%	89
E Senior Security	16,348	9%	2,258,661	8%	1%	106
F Suburban Stability	11,610	6%	1,627,170	6%	1%	105
G Domestic Success	24,130	13%	2,216,394	8%	1%	160
H Aspiring Home Makers	16,698	9%	2,480,360	9%	1%	99
I Family Basics	8,890	5%	1,992,713	7%	0%	66
J Transient Renters	4,812	3%	1,753,424	6%	0%	40
K Municipal Challenge	2,974	2%	1,841,381	7%	0%	24
L Vintage Value	4,080	2%	1,953,945	7%	0%	31
M Modest Traditions	4,664	2%	1,426,815	5%	0%	48
N Urban Cohesion	6,100	3%	1,354,052	5%	0%	66
O Rental Hubs	9,404	5%	2,222,854	8%	0%	62
Unclassified	2,813	-	-	-	-	
Base	**188,504**	**100%**	**27,696,750**	**100%**	**1%**	**100**

Note:
Target = Coastal West Sussex: Enquirers (2014 - 2015)
Base = UK excluding Northern Ireland (Households)

Figure 4: Core Mosaic group types compared to national average



Note:
Target = Coastal West Sussex: Enquirers (2014 - 2015)
Base = UK excluding Northern Ireland (Households)

3.2 Core Mosaic group segments - key features

3.2.1 A summary of the most popular Mosaic Segments within each Mosaic Group is presented below.

- **C10 Wealthy Landowners**

Prosperous owners of country houses including the rural upper class, successful farmers and second-home owners

  - High value large detached homes
  - Rural locations
  - Own several cars
  - Most likely to own a horse
  - Mature married couples
  - Own both PC and laptop

- **H30 Primary Ambitions**

Forward-thinking younger families who sought affordable homes in good suburbs which they may now be out-growing

  - Cohabiting couples with children
  - Aged 26-45
  - Good household incomes
  - Own with a mortgage
  - 2 or 3 bedroom terraces or semis
  - Family neighbourhoods

- **G26 Cafés and Catchments**

Affluent families with growing children living in upmarket housing in city environs

  - Professional couples with kids
  - Good income
  - Pleasant family homes
  - Attractive city suburbs
  - Proximity to jobs and entertainment
  - Most likely to have children 12-17

- **G27 Thriving Independence**

Well-qualified older singles with incomes from successful professional careers in good quality housing

  - Singles and cohabitees 36+
  - Family neighbourhoods
  - Middle managers
  - Large outstanding mortgage
  - Comfortable income
  - Moderate use of internet

- **I36 Solid Economy**

Stable families with children renting better quality homes from social landlords

  - Families with children
  - Renting from social landlord
  - Pockets of social housing
  - Lower wage service roles
  - Relatively stable finances
  - Small bills can be a struggle

- **B07 Alpha Families**

High-achieving families living fast-track lives, advancing careers, finances and their school-age kids' development

  - Married couples
  - Two professional careers
  - School age children
  - High salaries, large mortgage
  - Online shopping to save time
  - Company cars and mobiles

- **B06 Diamond Days**

Retired residents in sizeable homes whose finances are secured by significant assets and generous pensions

  - Well-off retirees
  - Spacious detaches homes
  - Comfortable retirement income
  - Wide range of investments
  - Check stocks and shares online
  - Often take short breaks and holidays

- **C13 Village Retirement**

Retirees enjoying pleasant village locations with amenities to service their social and practical needs

  - Retired couples and singles
  - Larger village location
  - Like to be self-sufficient
  - Enjoy UK holidays
  - Most likely to play cricket and golf
  - Often prefer post for communications

- **B05 Premium Fortunes**

Influential families with substantial income established in distinctive, expansive homes in wealthy enclaves

  - Extensive detaches homes
  - Substantial income
  - Teenage kids & students
  - Portfolio of investments
  - Directors and senior managers
  - High mobile phone spend

- **D14 Satellite Settlers**

Mature households living in expanding developments around larger villages with good transport links

  - Mature households
  - Live in larger villages
  - Close to transport links
  - Own pleasant homes
  - Online groceries
  - Try to reduce water used in home

Group B: Prestige Positions

Key Features

- High value detached homes
- Married couples
- Managerial and senior positions
- Supporting students and older children
- High assets and investments
- Online shopping and banking

Who we are

Age 56-65	Household income £100k-£149k
Household composition Family	Number of children 1 child
Tenure Owned	Property type Detached

Overview

Prestige Positions are affluent married couples whose successful careers have afforded them financial security and a spacious home in a prestigious and established residential area. While some are mature empty-nesters or elderly retired couples, others are still supporting their teenage or older children.

Core Features

Prestige Positions are well-educated couples who have reached senior and managerial positions in companies, or have accomplished professional careers. This is also the group most likely to have achieved success as directors of their own profitable businesses.

Prestige Positions live in large family homes even though some of them no longer have children living at home. These are expensive detached properties, frequently with five bedrooms and large mature gardens in easily commutable locations. Of those whose children have grown up many are still offering support, either with a place to live in the family home, or by supporting them through university. For this group the continued financial support of their children is not a problem. Almost all own their own home, many outright and, in addition to sizeable salaries or large pensions, they have a substantial investment portfolio making their financial situation very comfortable.

With busy lives to manage many make good practical use of the internet without spending long hours online. In particular they manage bank accounts online, search for savings accounts with the best interest rates, and save time by shopping online.

In general, Prestige Positions are attracted to premium brands, are able to afford expensive holidays and are well insured often including private medical insurance.

Group B: Prestige Positions

Shops Visited

Waitrose

MARKS & SPENCER

Sainsbury's

Online Activity: Grocery Shopping

With busy lives to manage many make good practical use of the internet without spending long hours online. They look to save time by shopping online especially with Ocado, where they are the second highest users of this online grocery provider.

What newspapers do they read?

THE TIMES

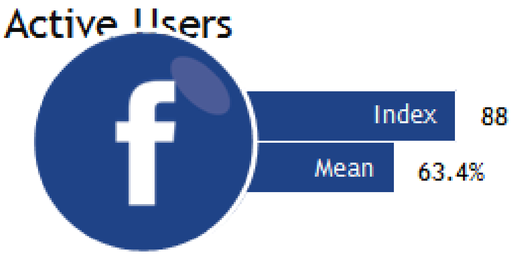
The Daily Telegraph

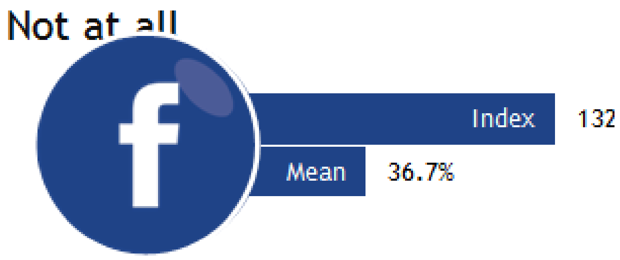
Online Activity: News & Media

FT FINANCIAL TIMES	Which?	The Telegraph
www.ft.com/home/	www.which.co.uk	www.telegraph.co.uk

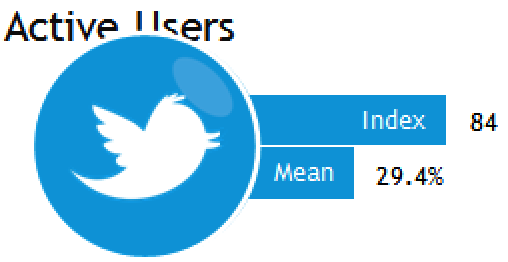
Group B: Prestige Positions

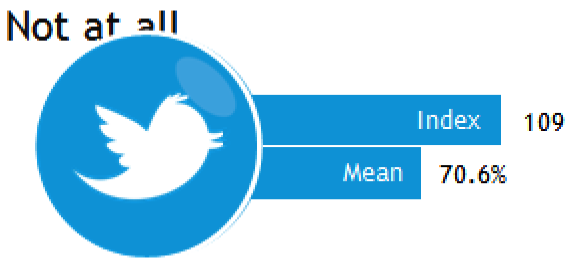
Social/Email Access



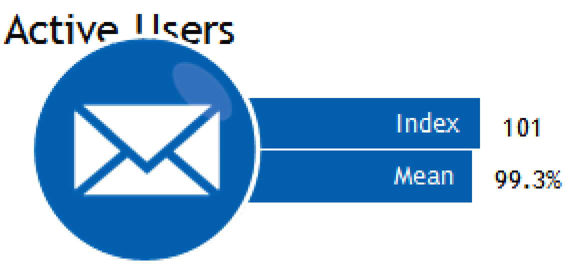


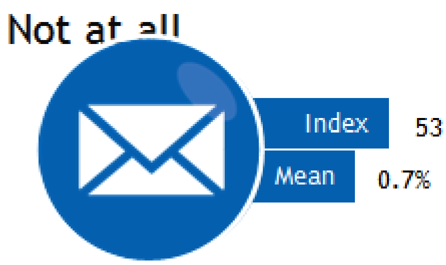
Group B shows a less than average use of Facebook; only 35% check it every day compared to the 44% national average, and they have a very high index score for no usage at all; the third highest of all the groups. Group B also have a below average use of entertainment and lifestyle sites, as well as social networking and forum sites in general with an index score of 87. This combined with their above average use of news sites suggests members of this group may see the Internet as a source of information rather than entertainment.





Twitter usage amongst this group follows a similar pattern to their Facebook usage. Accessing twitter most days is significantly less than the national average with an index score of 79. This low usage of social media could perhaps be correlated with their lower than average interest in new technology. The majority tend to upgrade technology when old devices become obsolete rather than buying new technology when it comes out.





81% of Group B check their emails every day compared to the 77.6% national average, and nearly 100% are active users. Their frequent email usage could be attributed to professional reasons, and their use of the Internet for work purposes is shown by their above average high usage of the LinkedIn website. They also have an above average ownership of smart TVs, tablets and PCs, although a slightly lower than average usage of smartphones.

Group B: Prestige Positions

Note: Index of 100 is the average for the population. Anything below suggests lower use than average and anything above suggests higher use than average.

Online Activity

Index: 85

YouTube

Index: 107

ebay

Index: 103

Google

Index: 183

Carnival

P&O CRUISES

Cruise

Index: 188

Golf Sites

Index: 171

FINANCIAL TIMES

FT

Index: 158

Which?

which?

Index: 158

London Stock Exchange

Index: 137

ancestry

Index: 135

LinkedIn

Group C: Country Living

Who we are

Age	Household income
66+	£100k-£149k
Household composition	**Number of children**
Family	1 child
Tenure	**Property type**
Owned	Named building

Key Features

- Rural locations
- Well-off homeowners
- Attractive detached homes
- Higher self-employment
- High car ownership
- High use of Internet

Overview

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.

Core Features

Country Living consists of affluent people who can afford to live in pleasant rural locations surrounded by agricultural landscapes. This population is divided between those still in work and retired people.
These people live in attractive, spacious detached homes that are often period properties or named buildings, and the majority are owned.

Incomes are good, either derived from occupational pensions, commuting to well-paid professional jobs or running successful farms or their own businesses - Country Living contains the highest proportion of self-employed people of any group. Asset holdings in the form of stocks and shares are high.

Living in the least densely populated rural locations means car ownership is high. Most households have at least two cars for tasks from grocery shopping, to doing the school run and commuting to work.

Although broadband speeds may be low, the internet is used for practical purposes as it gives this group access to a broader range of products and services than are available locally. The latest technology is not high on their agenda and mobiles aren't used extensively, probably due to less than reliable signals.

Group C: Country Living

Shops Visited

Waitrose

The co-operative

SPAR

TESCO

LIDL

Online Activity: Grocery Shopping

Internet is used for practical purposes as it gives this group access to a broader range of products and services than are available locally. So with this in mind, many will use online grocery shopping regularly on a weekly to monthly basis. As income is good within this group they enjoy using Ocado for shopping as well as Tesco Online.

What newspapers do they read?

The Daily Telegraph

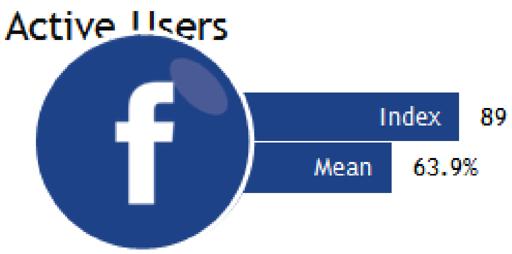
Daily Mail

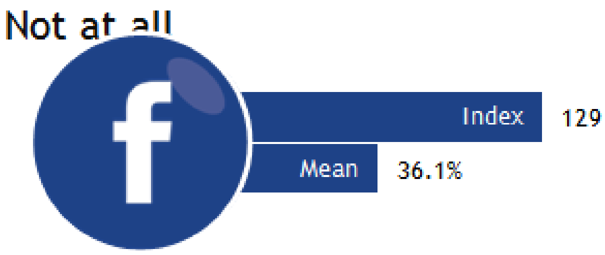
Online Activity: News & Media

Met Office	FT FINANCIAL TIMES	BBC WEATHER
www.metoffice.gov.u	www.ft.com/home/u	www.bbc.co.uk/weather

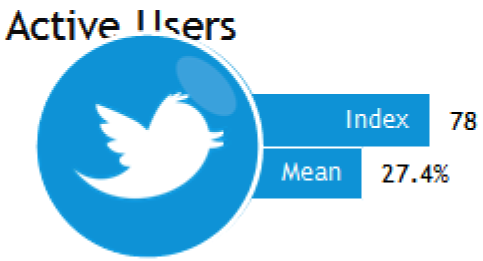
Group C: Country Living

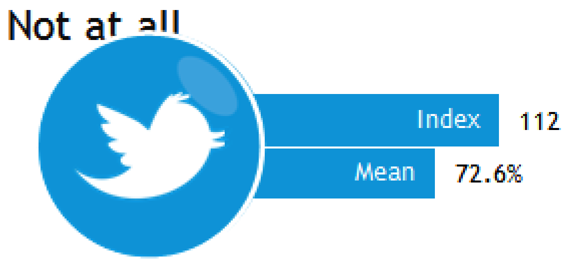
Social/Email Access



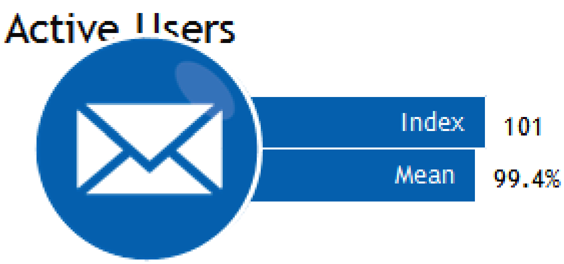


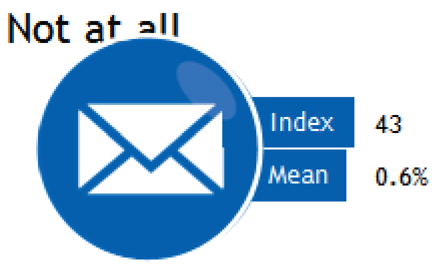
Only 35.3% of this group check their Facebook accounts daily which is quite substantially behind the national average of 44%. Instead this group have a higher propensity to visit Facebook on a monthly basis compared to most of the other groups. This could be down to the level of technology within the household, as this group are the most likely to use a PC within the household compared to owning a smartphone.





The trend continues with Twitter also, as this group are third least likely to have a Twitter account, only beaten by Group E & L which are traditionally elderly in age. For the 27.4% that do access Twitter, it is likely they will enjoy using this form of social media on weekly basis, though this is still marginally below the national average of 6.8%. This could again be linked with the lower then average use of smart phones which is 10% below the national average of 71.8%.





99.4% of Group C are active email users which is the second highest group, only beaten by Group A. With 80% checking their emails every day, and a further 15% checking their emails most days of the week, this is 2% higher then the national average. Though with such high data supporting email usage, this group still slightly prefer post as a means of communication for offers and promotions.

Group C: Country Living

Online Activity

Note: Index of 100 is the average for the population. Anything below suggests lower use than average and anything above suggests higher use than average.

Index: 81

YouTube

Index: 127

ebay

Index: 103

Google

Index: 184

Met Office

Index: 159

RACING POST

Index: 179

Pets/Animals Sites

Index: 151

Formula 1

MotoGP

Motorsport Sites

Index: 154

FT

FINANCIAL TIMES

Index: 141

Which?

which?

Index: 144

PrimeLocation.com

Group G: Domestic Success

Key Features

- Families with children
- Upmarket suburban homes
- Owned with a mortgage
- 3 or 4 bedrooms
- High Internet use
- Own new technology

Who we are

Age 36-45	Household income £70k-£99k
Household composition Family	Number of children 2 children
Tenure Owned	Property type Detached

Overview

Domestic Success are high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in higher managerial and professional roles.

Core Features

Families in Domestic Success are headed by couples typically aged in their late 30s and 40s, many of whom have school age children. Parents in this group are the most likely to have a degree and may have delayed having children until their careers were established.

They now live in good-sized three or four bedroom detached properties, owned with a considerable mortgage outstanding. Their lives are now settled and they have very comfortable standards of living. These are homes they can expect to stay in while their children grow up.

Company car ownership is high, a benefit of working for well-known organisations or professional firms in sectors such as finance, property, information technology and professional services.

Domestic Success are frequent internet users. As well as being constantly connected for work, they enjoy the time-saving convenience of banking, shopping and managing bills online. They love owning the latest technology and, in addition to smartphones, they are the most likely group to own tablets.

Group G: Domestic Success

Shops Visited

Sainsbury's

Waitrose

TESCO

MARKS & SPENCER

Online Activity: Grocery Shopping

Domestic Success are frequent internet users. They enjoy the time-saving convenience of shopping online. They will frequently use online super markets and have a higher than average propensity to use Ocado, Sainsburytoyou and Tesco's for home delivery.

What newspapers do they read?

theguardian

THE INDEPENDENT

Online Activity: News & Media

Which?

MailOnline

NEWS NOW.CO.UK >

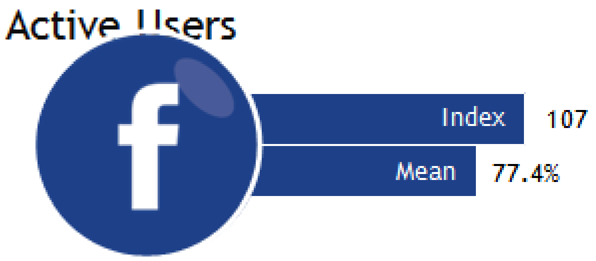
www.which.co.uk

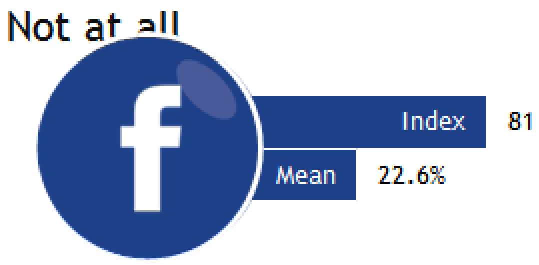
www.dailymail.co.uk

www.newsnow.co.

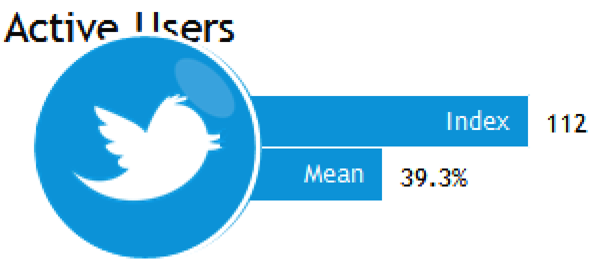
Group G: Domestic Success

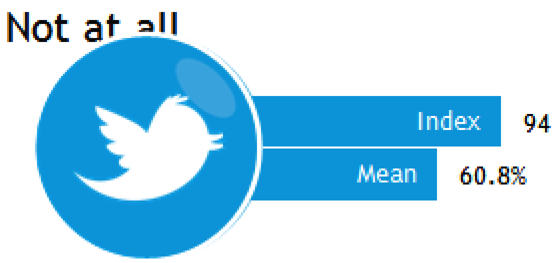
Social/Email Access



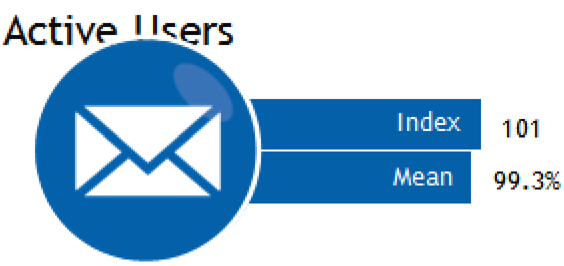


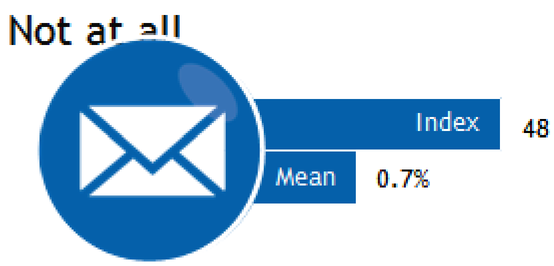
Data shows that Group G have a distinctly higher than average usage of Facebook. 47.9% access Facebook every day, and this ties in with the high internet usage of this group who tend to manage accounts, shop and bank online and also the presence of children in the household which may result in a higher use of technology and social media.





17.6% of Group G access Twitter daily and the index score of 127 shows this to be significantly higher than the national average. Their high usage of Twitter could be explained by the fact that this group is the most likely to own tablets with an index score of 124, and have an above average use of other forms of technology including smart TVs and smartphones.





77.5% of Group G check their emails every day, and email is also their preferred channel of communication. It is possible that this regular usage is for work related reasons as Group G often have successful careers in sectors such as finance. 72.3% surf the Internet every day, a percentage greater than the national average (67.8%), and this could be partly related to Group G's strong preference for new technology, with a high percentage buying new technology within 6 months of its release.

Group G: Domestic Success

Online Activity

Note: Index of 100 is the average for the population. Anything below suggests lower use than average and anything above suggests higher use than average.

Index: 94

YouTube

Index: 91

ebay

Index: 100

Google

Index: 123

BARCLAYS PREMIER LEAGUE

Index: 131

mumsnet

Index: 119

Which?

which?

Index: 118

GROUPON

Index: 118

LinkedIn

Index: 115

rightmove

Index: 115

tripadvisor

Accredited by:

Contact: research@tourismse.com

TSE RESEARCH

Coastal West Sussex Tourism Research Project 2016

Industry Performance Figures

Prepared by:

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TSE RESEARCH

August 2016

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Accredited by:

1 Volume & Value of Tourism

1.1 National and regional results

Table 1: National and regional results of tourism volume and value

Trips by domestic overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	17,040,000	16,200,000	5%	102,730,000	93,000,000	10%
Nights	45,560,000	43,700,000	4%	299,570,000	273,000,000	10%
Spend	£2,570,000,000	£2,448,000,000	5%	£19,571,000,000	£18,085,000,000	8%
Trips by overseas overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	5,141,000	4,648,000	11%	31,820,000	29,824,000	7%
Nights	37,350,000	34,645,000	8%	241,427,000	232,846,000	4%
Spend	£2,242,000,000	£2,160,000,000	4%	£19,427,000,000	£19,081,000,000	2%
Trips by day visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	216,000,000	227,000,000	-5%	1,298,000,000	1,345,000,000	-3%
Spend	£6,696,000,000	£7,571,000,000	-12%	£46,422,000,000	£46,024,000,000	1%
Total trips						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	238,181,000	247,848,000	-4%	1,432,550,000	1,467,824,000	-2%
Spend	£11,508,000,000	£12,179,000,000	-6%	£85,420,000,000	£83,190,000,000	3%

Source: GBTS, IPS and GBDVS, Visit England and Visit Britain

Results from GBTS reveal that 102.7 million domestic overnight trips were taken in England in 2015, an increase of 10% compared with 2014. The value of domestic overnight trips increased by 8%, from £18 billion to £19.6 billion in 2015.

Reflecting the national trend, the volume and value of domestic overnight trips in the South East also increased in 2015 compared to 2014. The volume of domestic overnight trips increased by 5% and trip expenditure also increased by 5%.

According to results from IPS, overseas visitors made a total of 31.8 million overnight trips in England, an increase of 7% compared with 2014. Trip expenditure increased by 2% at the national level.

Overseas visitor trip volume was also up for the region; total overnight trips taken by visitors from overseas to the South East increased by 11% and trip expenditure increased by 4%.
Figures published in the Great Britain Day Visits Survey (2015) indicate that there were 1.3 billion Tourism Day Visits undertaken in England during 2015 (down 3% compared to 2014). Despite a small drop in volume, spend per head was up, leaving to an increase in day trip expenditure of 1%.

The region saw a fall in tourism day trips in 2015 compared to 2014. Day trip volume at regional level dropped by 5% and day trip expenditure dropped by 12%.

Recent trends for Coastal West Sussex destinations show steady year-on-year increase in tourism value. Despite a fall in tourism value at regional level in 2015 compared to 2014, most destinations held their own and only saw a small change (+/-) compared to the previous year.

Table 2: Arun volume and value 2012 - 2015

	Adur				
	2015	2014	2013	2012	% change 2015/14
UK trips	66,967	65,949	70,488	67,620	1.5%
Overseas trips	17,790	17,105	16,826	16,334	4.0%
Total trips	84,757	83,054	87,314	83,954	2.1%
UK nights	205,600	205,568	219,618	214,187	0.0%
Overseas nights	137,465	136,369	127,331	124,461	0.8%
Total nights	343,065	341,937	346,949	338,648	0.3%
UK spend	£6,986,950	£6,974,031	£7,636,663	£7,860,217	0.2%
Overseas spend	£6,436,263	£6,344,045	£5,704,134	£0	1.5%
Total spend	£13,423,213	£13,318,076	£13,340,797	£7,860,217	0.8%
Tourism day visits	945,000	950,000	921,000	919,000	-0.5%
Tourism day visit spend	£30,240,000	£31,350,000	£30,504,441	£30,244,290	-3.5%
Total Spend	£43,663,213	£44,668,076	£43,845,238	£38,104,507	-2.2%
Total business turnover (with multiplier and other trip-related expenditure)	£59,617,000	£60,744,000	£59,635,000	£59,582,000	-1.9%
Total FTE Jobs supported by tourist expenditure	790	804	790	790	-1.7%

Source: Cambridge Model, TSE Research

Table 3: Arun tourism volume and value 2012 - 2015

	Arun				
	2015	2014	2013	2012	% change 2015/14
UK trips	530,451	521,010	491,255	517,268	1.8%
Overseas trips	66,760	64,094	59,274	59,291	4.2%
Total trips	597,211	585,104	550,529	576,559	2.1%
UK nights	1,598,491	1,596,474	1,418,665	1,569,322	0.1%
Overseas nights	399,217	391,680	372,605	367,363	1.9%
Total nights	1,997,708	1,988,154	1,791,270	1,936,685	0.5%
UK spend	£93,728,655	£93,561,936	£87,034,925	£93,413,094	0.2%
Overseas spend	£27,169,092	£26,173,182	£24,216,014	£24,513,188	3.8%
Total spend	£120,897,747	£119,735,118	£111,250,939	£117,926,282	1.0%
Tourism day visits	3,820,000	3,720,000	3,720,000	3,660,000	2.7%
Tourism day visit spend	£124,150,000	£120,900,000	£121,644,000	£119,279,400	2.7%
Total Spend	£245,047,747	£240,635,118	£232,894,939	£237,205,682	1.8%
Total business turnover (with multiplier and other trip-related expenditure)	£326,514,000	£320,616,000	£310,781,000	£316,942,000	1.8%
Total FTE Jobs supported by tourist expenditure	4,756	4,672	4,520	4,618	1.8%

Source: Cambridge Model, TSE Research

Table 4: Chichester volume and value 2015

	Chichester		
	2015		% change 2015/14
UK trips	447,701	No data for 2012-14 as Cambridge Model economic impact study was not commissioned	0
Overseas trips	123,352		0
Total trips	571,053		0
			0
UK nights	1,370,698		0
Overseas nights	664,021		0
Total nights	2,034,719		0
			0
UK spend	£76,131,324		0
Overseas spend	£56,150,214		0
Total spend	£132,281,538		0
			0
Tourism day visits	5,657,883		0
Tourism day visit spend	£189,240,307		0
			0
Total Spend	£321,521,845		0
			0
Total business turnover (with multiplier and other trip-related expenditure)	£411,429,000		0
			0
Total FTE Jobs supported by tourist expenditure	5,810		0

Source: Cambridge Model, TSE Research

Table 5: Worthing volume and value 2012 - 2015

	Worthing				
	2015	2014	2013	2012	% change 2015/14
UK trips	235,308	232,746	233,787	232,734	1.1%
Overseas trips	52,639	50,529	47,480	44,953	4.2%
Total trips	287,947	283,275	281,267	277,687	1.6%
UK nights	732,088	729,410	725,882	722,541	0.4%
Overseas nights	355,503	352,753	329,326	308,120	0.8%
Total nights	1,087,591	1,082,163	1,055,208	1,030,661	0.5%
UK spend	£43,052,238	£42,575,332	£43,102,373	£45,358,598	1.1%
Overseas spend	£19,966,806	£19,634,513	£17,886,307	£17,183,475	1.7%
Total spend	£63,019,044	£62,209,845	£60,988,680	£62,542,073	1.3%
Tourism day visits	3,360,000	3,340,000	3,300,000	3,260,000	0.6%
Tourism day visit spend	£75,700,800	£75,250,200	£74,250,000	£70,090,000	0.6%
Total Spend	£138,719,844	£137,460,045	£135,238,680	£132,632,073	0.9%
Total business turnover (with multiplier and other trip-related expenditure)	£185,295,000	£183,455,000	£180,328,000	£177,263,000	1.0%
Total FTE Jobs supported by tourist expenditure	2,643	2,616	2,571	2,531	1.0%

Source: Cambridge Model, TSE Research

Table 6: Coastal West Sussex volume and value 2015

	Coastal West Sussex
	2015
UK trips	1,280,427
Overseas trips	260,541
Total trips	1,540,968
UK nights	3,906,877
Overseas nights	1,556,206
Total nights	5,463,083
UK spend	219,899,167
Overseas spend	109,722,375
Total spend	329,621,542
Tourism day visits	13,782,883
Tourism day visit spend	419,331,107
	0
Total Spend	748,952,649
Total business turnover (with multiplier and other trip-related expenditure)	982,855,000
Total FTE Jobs supported by tourist expenditure	13,999

Note: Trend data cannot be provided due to absence of results for Chichester

2 Serviced accommodation occupancy

2.1 Coastal West Sussex avg. room occupancy

The average annual room occupancy rate for Coastal West Sussex in the past few years have been lower than the regional averages but similar to the national averages.

Table 7: Average room occupancy by month/year

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Average
2015	42	53	69	68	70	77	74	70	79	68	56	46	64
2014	40	42	49	58	70	78	74	75	77	62	56	49	61
2013	32	46	64	64	74	73	86	77	69	54	59	40	61
2012	41	40	43	53	73	72	76	66	79	68	66	51	61
2011	34	40	40	58	63	73	66	75	74	20	55	43	53
2010	40	45	38	55	62	66	66	64	71	46	54	36	54
2009	47	45	49	60	53	67	76	74	73	56	52	39	58
2008	47	46	54	57	60	60	70	77	75	61	54	41	59
2007	38	47	48	48	60	71	72	71	68	61	54	42	57

Source: England Occupancy Survey – county results

2.2 South East region avg. room occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Average
2015	56	64	57	69	75	82	84	80	82	75	67	58	71
2014	52	60	63	69	75	80	82	81	79	74	65	59	70
2013	48	56	61	65	74	78	82	79	79	71	65	56	68
2012	46	54	60	64	71	75	77	75	79	71	61	52	66
2011	45	54	55	65	66	76	79	74	75	61	58	50	63
2010	40	50	37	56	63	76	78	74	76	63	58	48	60
2009	39	45	48	53	56	62	61	61	67	58	49	43	53
2008	43	54	54	57	61	65	69	65	70	61	55	45	58
2007	36	44	49	53	62	68	75	68	68	59	50	43	56

Source: England Occupancy Survey – regional results

2.3 England avg. room occupancy

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual Average
2015	46	53	54	61	66	73	76	75	76	68	58	52	63
2014	44	51	55	61	66	70	75	75	73	67	57	51	62
2013	43	53	57	59	66	71	75	75	73	65	59	51	62
2012	43	50	56	60	64	70	68	71	74	65	57	49	61
2011	43	52	55	61	62	70	73	70	72	63	56	49	61
2010	42	52	55	61	65	71	76	71	72	63	51	44	60
2009	42	49	51	58	61	65	67	67	69	64	56	51	58
2008	45	55	55	59	65	66	71	70	69	64	56	48	60
2007	50	54	57	61	64	72	71	73	71	69	62	51	63

Source: England Occupancy Survey – national results

3 Visits to attractions

3.1 Annual visitor footfall

At national level, attractions reported a 2% annual increase in total visits to visitor attractions in 2015 (adults and children), a slower rate of growth than reported in each of the past two years.

Based on results provided by a sample of West Sussex attractions, most saw an increase in footfall in 2015 compared to 2014.

Attraction	District	2011	2012	2013	2014	2015 s	14/15 % change	Charge
Amberley Museum	Horsham	DK	DK	DK	35,000	42,000	20%	Paid
Arundel Wetland Centre	Arun	102,595	88,500	87,900	88,085	93,329	6%	Paid
R S P B Pagham Harbour	Chichester	DK	DK	DK	153,081	168,187	10%	Free
Coultershaw Beam Pump	Chichester	759	810	843	925	949	3%	Paid
Horsham Museum	Horsham	67,506	73,947	74,135	85,981	91,312	6%	Free
Fishers Adventure Farm Park	Chichester	129,092	122,492	129,889	178,398	177,151	-1%	Paid
Go Ape! Crawley		DK	DK	DK	DK	40,900	DK	Paid
Nymans	Mid Sussex	284,232	243,976	262,861	311,818	319,023	2%	Paid
Bognor Regis Wireless Museum	Arun	DK	6,431	6,437	7,312	6,791	-7%	Free
Petworth House & Park	Chichester	133,821	115,426	140,240	148,000	163,539	10%	Paid
East Grinstead Museum	Mid Sussex	5,200	DK	4,848	DK	4,300	DK	Free
RSPB Pulborough Brooks	Horsham	95,425	98,500	DK	85,213	82,266	-3%	Paid
Henfield Museum	Horsham	1,941	1,763	1,679	2,219	2,253	2%	Free
South Downs Light Railway	Horsham	DK	DK	16,000	17,500	16,778	-4%	Paid
Standen	Mid Sussex	93,243	DK	82,981	103,337	120,022	16%	Paid
Stansted House	Chichester	5,089	6,500	5,600	6,446	6,826	6%	Paid
Sussex Prairies	Horsham	DK	10,000	20,000	20,000	20,000	0%	Paid
Tilgate Park and Nature Centre	Crawley	DK	DK	500,000	550,000	500,000	-9%	Paid
Crawley Museum Centre	Crawley	1,945	632	585	615	647	5%	Free
Uppark House and Garden	Chichester	59,004	58,786	52,854	57,931	62,000	7%	Paid
Wakehurst Place	Mid Sussex	414,223	347,073	335,439	228,559	251,949	10%	Paid
Ifield Watermill	Crawley	1,487	973	805	517	632	22%	Free
Woolbeding Gardens	Chichester	9,924	3,901	5,733	6,562	6,655	1%	Paid

Note: Includes Crawley, Horsham, and Mid Sussex attractions

Source: Annual Attractions Monitor, destination results, Visit England

Accredited by:

Contact: research@tourismse.com

TSE RESEARCH

Coastal West Sussex Tourism Research Project

Social Listening Review

1 May to 31 July 2016

TSE Research
40 Chamberlayne Road
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TSE RESEARCH

TSE RESEARCH

August 2016

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Arundel

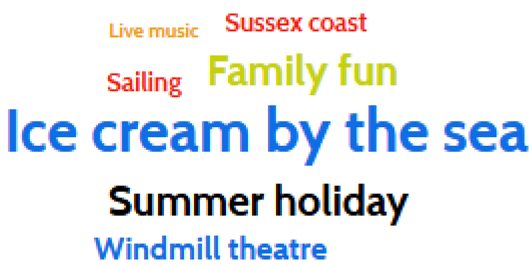
Source	Count	%
twitter	845	47%
instagram	507	28%
facebook	324	18%
flickr	66	4%
google+	28	2%
wordpress	23	1%
blogs	8	0%
google news	6	0%
Cariboo	2	0%
Total mentions	1809	100%

Bognor Regis

Source	Count	%
twitter	658	74%
facebook	163	18%
google news	16	2%
google+	16	2%
wordpress	14	2%
flickr	12	1%
blogs	5	1%
Total mentions	884	100%

Littlehampton

twitter		
twitter	69	38%
instagram	57	31%
facebook	43	24%
google news	6	3%
wordpress	4	2%
blogs	1	1%
google+	1	1%
Total mentions	181	100%



Chichester

Source	Count	%
twitter	883	52%
facebook	452	26%
instagram	308	18%
flickr	20	1%
google+	18	1%
wordpress	18	1%
google news	9	1%
blogs	2	0%
Total mentions	1710	100%

Worthing

Source	Count	%
twitter	938	44%
facebook	765	36%
instagram	354	17%
flickr	30	1%
google+	16	1%
wordpress	11	1%
blogs	8	0%
google news	6	0%
photobucket	2	0%
Cariboo	1	0%
yahoo answers	1	0%
Total mentions	2132	100%

COASTAL WEST SUSSEX
Hotel & Visitor Accommodation Development Opportunities

Prepared for:
Coastal West Sussex Partnership

August 2016

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the hotel development consultancy

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Appendices

COASTAL WEST SUSSEX – HOTEL & VISITOR ACCOMMODATION DEVELOPMENT OPPORTUNITIES

1. Introduction

The following report provides an assessment of the potential opportunities for hotel and visitor accommodation development in Coastal West Sussex and the possible actions that the Coastal West Sussex local authorities and their partners might wish to consider to accelerate hotel and visitor accommodation development in Coastal West Sussex going forward. The assessment is based on:

- A review of the previous studies that have been undertaken to assess the potential for hotel and visitor accommodation development, improvement and retention in Coastal West Sussex;
- A review of national hotel and visitor accommodation development trends of relevance to Coastal West Sussex.

Four hotel and visitor accommodation studies have been completed for different parts of Coastal West Sussex in the last 11 years (all by Hotel Solutions):

- Coastal West Sussex Hotel & Visitor Accommodation Futures (2008)
- Adur & Worthing Hotel & Visitor Accommodation Futures (2013)
- Chichester Hotel Futures (2005)
- South Downs National Park Visitor Accommodation Review (2014)

The coverage of these studies varies from just hotels (in the case of the Chichester Hotel Futures Study), to the full range of visitor accommodation offers. While some of the studies are now somewhat out of date, the review provides an indication of the types of visitor accommodation there could still be potential for in Coastal West Sussex. Where we have more current information or insight, we have updated the findings. All of the studies were commissioned primarily to inform planning policy development for hotel and visitor accommodation development and retention.

Appendix 1 provides a summary of the key findings, conclusions and recommendations of the four hotel and visitor accommodation studies.

The review of national hotel and visitor accommodation development is presented at Appendix 2.

We have also provided at Appendix 3 a glossary of definitions of different types of tourist accommodation.

We provide below some thoughts on the key messages from the reviews of the previous studies and national trends, and a potential forward programme of action to build on the insight they provide to accelerate hotel and visitor accommodation development and improvement across Coastal West Sussex.

2. Hotel and Visitor Accommodation Demand

All of the previous studies show a similar picture in terms of demand for hotel and visitor accommodation in terms of:

- A largely leisure-driven and seasonal accommodation market, characterised by strong weekend and summer demand with clear shortages of all forms of visitor accommodation at these times, but weaker midweek and winter demand;
- Strong demand for Premier Inn and Travelodge budget hotels, which consistently fill and turn business away throughout the year, both during the week and at weekends.
- A tougher market for full-service 3 star hotels due to the lack of midweek corporate demand: 3 star hotel performance is relatively weak as a result, in terms of both room occupancy and achieved room rates.
- Strong demand for high quality pub accommodation;
- Good demand for B&Bs and guest houses;
- High demand for self-catering accommodation between April and October and frequent shortages during the peak summer months, when most self-catering units are fully booked;
- Strong demand and frequent shortages of provision for touring caravanning and camping during the main summer months and at weekends between May and September if the weather is good;
- A stable market for caravan holiday home purchase and hire.
- Very high demand for family holidays and breaks at the Butlins Bognor Regis resort.

While some of the studies are now very out of date, national trends in staying tourism suggest that demand for hotel and visitor accommodation across Coastal West Sussex is likely to have strengthened, both during the recession (2009-2012) as a result of the growth in staycation demand, and since 2013 as a result of the recovery and growth in the economy. The Brexit vote has also proved to be very positive for the UK holiday industry during the 2016 summer season, particularly as a result of the fall in the pound, which has encouraged British people to holiday in the UK this year, and attracted more overseas visitors, taking advantage of the more favourable exchange rates. With relatively little change in overall accommodation supply, the shortages of accommodation identified in the previous studies are likely to have remained and may have become more acute.

3. Accommodation Development Opportunities

All of the previous studies and the review of national hotel and visitor accommodation development trends, show similar opportunities for accommodation development in terms of:

- Budget hotel development in the main towns and resorts: Bognor Regis Seafront, Littlehampton Seafront and Chichester East remain targets for Premier Inn, while Shoreham-by-Sea is a target for Travelodge. There could also be potential for a third budget hotel in Worthing, most likely as part of the Teville Gate scheme or another major regeneration project;
- Possible scope identified in the 2008 Coastal West Sussex Hotel & Visitor Accommodation Futures Study for midmarket upper-tier budget or 3 star hotels in Bognor Regis and Worthing, given anticipated growth in corporate demand. The 2013 Adur & Worthing Hotel & Visitor Accommodation Futures Study did not however reaffirm the potential for a hotel of this standard in Worthing, as the growth in corporate demand had not materialised in the way that had been expected before the 2008-2012 recession. This could also be the case in Bognor Regis;
- Potential for the acquisition of 3 star hotels in Bognor Regis and Worthing by coaching holiday companies. This has happened in Bognor Regis, with the acquisition by Leisureplex Hotels on the Royal Norfolk Hotel, but not in Worthing, where the resort's 3 star hotels remain in private ownership;

- Scope possibly for the development of small boutique hotels in Arundel, Chichester, Worthing, Littlehampton and Shoreham-by-Sea, most likely through the repositioning of existing small hotels, large guest houses or pubs with rooms, but potentially also through the conversion of suitable properties. The 2008 Coastal West Sussex Hotel & Visitor Accommodation Study did not identify potential for boutique hotels in Bognor Regis however;
- Potential for further hotels at the Butlins Bognor Regis resort and scope possibly for hotels on some of the area's larger holiday parks;
- A need for the ongoing upgrading of existing hotels;
- The likelihood of some small, low quality hotels coming forward for conversion to residential use where all reasonable efforts to find new owners that are prepared to invest have been exhausted. This has happened in Bognor Regis with the closure of the Royal Hotel on the seafront for conversion to residential apartments, and the recent granting of planning permission by Worthing Borough Council for the conversion of The Kingsway Hotel on Worthing seafront into residential apartments;
- The possible opening of country house hotels in the rural hinterland of Coastal West Sussex, if suitable properties become available for conversion;
- The development of hotels on golf courses;
- The development of good quality pub accommodation, including boutique inns, and new-build pub restaurants with adjacent lodge accommodation on the edge of some of the main towns;
- The opening of restaurants with rooms;
- The upgrading of guest houses and B&Bs, including some to a contemporary/ boutique style;
- The opening of new B&Bs to replace those that close as owners retire;
- Potential for guesthouses and B&Bs to develop family rooms and suites to cater for the family market;
- Possible opportunities in the rural hinterland for farmhouse B&Bs if there are farming families here that wish to provide such accommodation;
- The development of facilities for walkers and cyclists at rural B&Bs;
- The opening of B&B for Horses establishments in the rural hinterland;
- The development of hotel and/or B&B accommodation linked to wedding venues;
- The development of wellness retreats;
- Potential for the development of serviced or self-catering apartments in Worthing, and in the longer-term at Shoreham Harbour in terms of the letting of residential apartments, the full or partial conversion of hotels, or purpose-built serviced or self-catering apartment blocks;

- Additional holiday cottages through the letting of residential properties and conversion of barns and other agricultural buildings, including holiday cottage complexes with leisure, large 'super' cottages for family and friend get togethers, 5 star and boutique holiday cottages, and access exceptional self-catering properties suitable for use by independent wheelchair users;
- Holiday lodge development, in terms of individual lodges, small lodge complexes, and woodland, lakeside or marina-side holiday lodge parks, with units for rental and/or outright or timeshare purchase;
- The development of eco lodges, small complexes of eco lodges and eco lodge parks;
- The opening of fishing lodges associated with fishing lakes, golf lodges on golf courses, and possibly lodge accommodation at equestrian centres;
- The ongoing upgrading, development and possible expansion of holiday parks, including the replacement of caravan holiday homes with holiday lodges and the introduction of other forms of accommodation such as camping pods and glamping units;
- The development of new holiday parks, given suitable sites that can achieve planning permission;
- Some self-catering treehouse developments in suitable woodland or forest settings;
- The improvement, development and expansion of existing touring caravan and camping sites, and extension of operating seasons, including potentially year-round operation;
- The development of new touring caravan and camping sites, given suitable sites that can achieve planning permission;
- Glamping provision;
- The development of small camping pod sites;
- A possible opportunity for a surfing pod development at Shoreham or Lancing Beach;
- Scope potentially for a children's activity holiday centre, given a suitable property and site;
- Potential for residential activity centres linked to outdoor pursuits and water sports centres, including the proposed hostel and watersports centre at Lancing Beach.

4. Planning Policy Recommendations

All of the previous studies make similar recommendations regarding planning policy for hotel and visitor accommodation development and retention in terms of:

- Planning for accommodation growth and recognising the full range of hotel and visitor accommodation offers that there is potential for, in particular the need for additional provision in terms of budget hotels, self-catering accommodation, touring caravan and camping sites, caravan holiday homes, and holiday lodges.
- A policy approach that recognises the locational requirements for different types of hotel and visitor accommodation and makes provision for appropriate accommodation development on the coastal strip and in the rural hinterland, including developments of scale on suitable sites that can meet other planning policy considerations regarding visual, environmental, community and traffic impacts.
- A consistent planning policy approach to visitor accommodation development in the South Downs National Park 5km Buffer.
- A planning policy approach that facilitates year-round operation of accommodation businesses.
- Policies that recognise the need for on-site staff accommodation for rural accommodation businesses.
- The need for robust accommodation retention policies that clearly set out the evidence that applicants need to provide to support change of use applications, whilst allowing a degree of flexibility to allow poor quality and less well located accommodation businesses that have been unable to secure investment or new owners to exit.
- A simple and responsive planning application process, without stringent planning conditions that will add significant cost to hotel and visitor accommodation development schemes, to the point that they are no longer viable.
- Consideration of enabling development to achieve viable accommodation development projects.

5. Recommendations for Proactive Public Sector Interventions to Support and Accelerate Hotel and Visitor Accommodation Development

All of the studies make similar recommendations regarding more proactive public sector intervention to support and accelerate hotel and visitor accommodation development and help grow staying tourism;

- Proactive local promotion of the opportunities for accommodation development
- Work to identify and market suitable sites and properties for hotel development and larger scale visitor accommodation schemes;
- The provision of tailored business support and quality improvement initiatives for the visitor accommodation sector, including if possible grant aid or other financial assistance;
- Destination marketing and events and product development focused on boosting off-peak business;
- The development of the corporate market for hotel accommodation through the progression of office and business park development projects and the attraction of occupiers that will generate strong demand for hotel stays;
- Periodic reviews of studies to ensure up-to-date information, evaluate the impact of any interventions, and establish ongoing opportunities and priorities.

While most of the studies are now out-of-date, accommodation demand across Coastal West Sussex is likely to have continued to grow since they were completed, both during the recession as a result of the staycation trend, and subsequently as the economy has strengthened, inbound tourism has grown, and online booking channels have boosted demand. All of the recent hotel and visitor accommodation studies that Hotel Solutions has completed in other parts of the country have shown strong and growing demand for all types of accommodation, with many accommodation businesses reporting record levels of performance; continuing shortages of all types of accommodation at peak times; and improving off-peak performance through investment and marketing to attract business at quieter times. It is not unreasonable to assume that many of the opportunities for accommodation development that the studies identified are still valid and that there remains a need to boost peak season accommodation capacity, whilst endeavouring to grow off-peak demand. This perhaps needs checking through new research however.

6. Potential Forward Actions

Going forward there are a number of actions that the Coastal West Sussex local authorities and their partners could consider in order to bring forward, support and encourage the types of hotel and visitor accommodation provision that the previous studies identified potential for, in terms of:

1. Progressing the major regeneration schemes that could incorporate hotels in Bognor Regis (the redevelopment of the Regis Centre site and Hothamton Car Park) and Worthing (Teville Gate).

2. Work to identify and investigate potential budget hotel sites in Littlehampton, Chichester and Shoreham-by-Sea that can be put to Premier Inn and Travelodge.

3. Consideration of direct council investment in new budget hotel projects. Local authorities are increasingly looking at direct investment in hotel projects and potentially also other large-scale accommodation development as a means of generating an ongoing income stream for the council. There could be merit in progressing work to help Coastal West Sussex local authorities to better understand such opportunities. We have provided at Appendix 4 a review of how local authorities, LEPs and other public sector bodies have been investing in and supporting hotel schemes in the UK.

4. Work to identify and investigate potential sites for major accommodation development schemes on the coast and in the rural hinterland, including holiday parks, holiday lodge parks and touring caravan and camping sites. This could include work to further investigate the potential for the proposed holiday village at the Shoreham Cement Works.

5. Undertaking or commissioning new research to check that the hotel and visitor accommodation development opportunities that the previous studies have identified remain valid, and assess whether there are any barriers that are holding back accommodation development in Coastal West Sussex. There is not necessarily a need to update all aspects of the previous studies. Priorities should be in terms of:

    - Updating the information on hotel performance to confirm that there is still potential for new budget hotels and to assess the need/ potential to retain and improve existing 3 star hotels;
    - Assessing whether there are still shortages of self-catering accommodation and touring caravanning and camping provision;
    - Understanding and supporting the future investment and expansion plans of holiday park operators and assessing the potential for new holiday parks and holiday lodge parks, if potential sites can be identified.

6. Work to raise awareness of visitor accommodation development opportunities in Coastal West Sussex, particularly in terms of B&B provision, pub accommodation, boutique places to stay, self-catering, glamping, touring caravan and camping sites, holiday lodges, hotels and lodges on golf courses, fishing lodges and farm accommodation.

7. Work to secure and focus the allocation of potentially available funds for visitor accommodation development in Coastal West Sussex through the Sussex Downs and Coastal Plain LEADER Programme, Coast to Capital LEP EAFRD Programme, and possible future rounds of funding through the Coastal Communities Fund.

APPENDICES

APPENDIX 1

COASTAL WEST SUSSEX HOTEL & VISITOR ACCOMMODATION STUDIES 2005-2016 – SUMMARY OF KEY FINDINGS, CONCLUSIONS & RECOMMENDATIONS

1. COASTAL WEST SUSSEX HOTEL & VISITOR ACCOMMODATION FUTURES (2008)

The Coastal West Sussex Hotel & Visitor Accommodation Futures Study was commissioned in March 2008 by the 5 Towns Network on behalf of Arun District Council, Worthing Borough Council and Adur District Council, with funding support through the Coastal West Sussex Area Investment Framework and Tourism South East. The purpose of the study was to provide the three councils with a detailed assessment of the future for the hotel and visitor accommodation sector in the four main towns along Coastal West Sussex (Bognor Regis, Littlehampton, Worthing and Shoreham-by-Sea). The study looked at both the potential for the upgrading, development and retention of existing hotels and visitor accommodation businesses and the scope for new hotel and visitor accommodation development in each town.

In terms of hotel and visitor accommodation performance and market demand, the study showed the following:

- Relatively low hotel and guest house occupancies and achieved room rates in Bognor Regis, primarily as a result of a lack of midweek and winter corporate demand: the hotel and guest house market in Bognor Regis is primarily leisure-driven, and as a result seasonal and weather dependent. The exceptions here are the Premier Inn budget hotel and the hotels on the Butlins Bognor Regis resort, which trade at very high occupancies throughout the year.
- High occupancies for the budget hotels at Littlehampton, which were consistently filling and turning business away both during the week and at weekends.
- Stronger hotel and guest house performance in Worthing due to the base of corporate demand from the major companies based here, although there is insufficient corporate demand to fill all of the town's hotels midweek.
- A shortage of hotel and good quality guesthouse accommodation in Shoreham-by-Sea to service the requirements of local companies.
- Strong demand for self-catering holidays in Coastal West Sussex between April and October, and a clear shortage of self-catering accommodation during the peak summer months.

- High demand for touring caravanning and camping during school holiday periods and Bank Holiday weekends, and a shortage of this type of accommodation at these times.
- Steady demand for caravan holiday home purchase and hire.
- Very high demand for family holidays and breaks at the Butlins Bogor Regis resort.

Potential was identified for the following in terms of hotel development:

- Budget hotels at Bognor Regis, Littlehampton, Worthing and Shoreham by Sea;
- Upper tier budget or possibly 3 star hotel development at Bognor Regis and Worthing linked to growth in corporate demand, and given the right deal for a hotel operator;
- The possible repositioning of existing hotels to boutique hotels at Worthing;
- Potential scope for new boutique hotels at Littlehampton, Worthing and Shoreham;
- The possible acquisition of existing hotels at Bognor and Worthing by coaching holiday companies;
- The continued development of hotels at Butlins Bognor Regis to replace the resort's chalet accommodation.

Key sites and locations for hotel development were identified as:

- At Bognor Regis, the Regis Centre site; Butlins; the proposed marina (if progressed); and the arterial routes into and through the town;
- At Littlehampton, the A259 and potentially Harbour Park (if the site is ever redeveloped);
- At Worthing, the Tevillegate/Station Gateway site, the Retail Core, the Aquarena site, arterial routes into and through the town/Borough, and the East Worthing Access Route (is ever progressed);
- At Shoreham-by-Sea, the Parcelforce site, DSS site for a small boutique hotel, restaurant with rooms, or pub accommodation operation; and in the longer term Shoreham Harbour.

Progress since 2008 has been as follows:

- The Royal Norfolk Hotel in Bognor Regis has been acquired by Leisureplex Hotels, part of the Alfa Travel coaching holiday company.
- Plans to redevelop the Regis Centre site and Hothamton Car Park in Bognor Regis, which included two hotels (one with 59 bedrooms, the other with 48 bedrooms) were rejected by Arun District Council in March 2016.
- Arun District Council granted planning permission in November 2015 for the conversion of the Royal Hotel on Bognor Regis seafront into residential apartments.
- Butlins has plans to build more hotel accommodation along the seafront edge of its Bognor Regis resort.
- Outline planning permission was granted in January 2013 for the North Littlehampton Strategic Development Area mixed-use development, which includes a proposal for a 100-bedroom hotel.
- The Beach Hotel in Worthing has been demolished and replaced with a new Premier Inn budget hotel and residential apartments.
- Worthing Borough Council granted planning permission in June 2016 for the conversion of The Kingsway Hotel to residential apartments

In terms of potential for the development of other forms of visitor accommodation, the study identified scope for:

- Potential for the development of serviced apartments in Worthing and longer-term in Shoreham Harbour in terms of:
    - Residential apartments being let as serviced apartments;
    - Full or partial conversion of hotels to serviced apartments;
    - Purpose-built serviced apartment operations.
- Potential for additional self-catering accommodation in terms of:
    - Residential properties being let as self-catering holiday accommodation;
    - Full or partial conversion of hotels to self-catering apartments;
    - Purpose-built self-catering accommodation operations.
- Potential for new touring caravan and camping sites and a need to retain the current level of provision for this type of accommodation.
- Potential for existing holiday parks to upgrade and/or expand.
- Possible scope for new holiday parks.

The Hotel & Visitor Accommodation Futures Study identified the following key implications for consideration by the three councils as they progressed the preparation of Local Development Frameworks for their areas:

- The need for strategies and policies that positively encourage and support the development of the types of hotel and visitor accommodation that the study identified potential for in the four towns. It was recommended that as far as possible this should include the avoidance of stringent planning conditions and restrictions that could stifle the development of hotels and visitor accommodation businesses, recognising that the four towns are not priority development locations for most hotel companies.
- The development of locational strategies and site allocations for hotels in line with market and hotel developer requirements, reflecting the priority locations and sites identified for each town.
- The need to recognise that there is likely to be a need for some rationalisation of the existing hotel and guesthouse supply in each town (particularly if/as new budget hotels open) and a need for robust hotel and guesthouse retention policies to effectively manage this process of rationalisation.
- The need for ongoing monitoring of changes in hotel and guesthouse supply and demand in order to support the implementation of retention policies.
- A need for Arun and Worthing to consider policies for the retention of existing touring caravan and camping sites and/or allocations for replacement sites for the Northbrook Farm and Daisy Fields sites.
- Consideration of the need for a retention policy for holiday parks in Arun.
- Possible specific mention of the development plans for Butlins in the Arun LDF.

In moving forward, the Hotel & Visitor Accommodation Study made the following recommendations for consideration by the three councils:

- A need for each council to decide on the strategy it wishes to pursue for new hotel development in each town in terms of:
    - Proactively encouraging budget hotel development, as the best chance of securing new hotels for each town and recognising the impact that such hotels are likely to have on existing hotels and guesthouses;
    - Targeting and possibly incentivising upper-tier budget, 3 star and/or boutique hotel development instead of, or alongside budget hotel development;
    - Resisting budget hotel development / holding out for higher standard hotels on sites that they control;
    - Leaving new hotel development entirely to market forces.
- A need for each council to decide how important and realistic it is for each town to develop as a leisure break destination.
- Research to assess the potential corporate demand for a new hotel in Worthing.
- Support for existing hotels and guesthouses to assist them in upgrading and/or repositioning.
- Work to develop the hotel and guesthouse market in each town in terms of:
    - Attracting the sort of companies to new offices and business parks that will generate good demand for hotels and guesthouses;
    - Developing the leisure offer of each town in terms of major attractors of leisure break business; bars, restaurants and nightclubs; speciality shopping; the cultural and arts offer; new visitor attractions; events and festivals; and possibly a gay scene.
    - Effective marketing of the towns for leisure breaks;
    - Possible renewed marketing of Worthing as a destination for association conferences, together with investment in upgrading the Assembly Hall as a conference venue.

2. ADUR & WORTHING HOTEL & VISITOR ACCOMMODATION FUTURES (2013)

The Adur & Worthing Hotel & Visitor Accommodation Futures Study was commissioned in September 2013 by Adur & Worthing Councils to update the Adur and Worthing sections of the 2008 Coastal West Sussex Hotel & Visitor Accommodation Futures Study. The study provided an up-to-date assessment of the opportunities and requirements for the future development of all forms of hotel and visitor accommodation across Adur & Worthing. The findings have been used to inform planning policy formulation for hotels and visitor accommodation; guide the assessment of planning applications for hotel and visitor accommodation development and change of use proposals; and identify other interventions that the Councils can make to support and encourage hotel and visitor accommodation development and improvement and build market demand for overnight stays in the area.

In terms of current market demand for hotel and visitor accommodation in Adur and Worthing, the study showed the following:

- Strong demand in Worthing for budget hotels, guesthouses and B&B accommodation, with such establishments generally achieving high midweek and weekend occupancies for much of the year and frequently filling and turning business away between April and October, both during the week and at weekends.
- Weaker demand for full service 3 star hotels and relatively low room rates for hotels of this standard. The local corporate market is very cost conscious and does not deliver sufficient volumes of midweek business to support all of the town's hotels. One hotel consequently caters for lower-rated coach holiday groups during the week. Weekend demand for full service hotels is highly seasonal and predominantly just for Saturday night stays, with hotels achieving low Friday and Sunday occupancies, particularly during the winter months.
- Evidence of latent demand in Shoreham-by-Sea from the contractors market, long stay business visitors working on projects for local companies, people on training courses, and people attending weddings and family parties or visiting friends and family locally.

- Leisure break demand for all types of serviced accommodation is relatively low, both in volume and price terms. Such business is primarily from people using accommodation in Adur & Worthing as a base for visiting Brighton: far fewer leisure break stays seem to be motivated by a specific desire to visit Worthing or Shoreham-by-Sea. Some hotels, guesthouses and B&Bs have successfully attracted leisure stays through the online travel agents, albeit at discounted room rates. Other markets for serviced accommodation establishments are event visitors, overseas tourists stopping off en-route to/from the West Country, language school teachers and the families of students studying at the language schools in Worthing.
- Strong demand for self-catering accommodation in Adur & Worthing between April and October and frequent shortages during the peak summer months, when most self-catering units are fully booked. Higher quality, modern self-catering generally attracts the strongest demand. Key markets are holiday visitors, people visiting friends and relatives and long stay business visitors working on projects. Demand is lower during the winter months but self-catering units still attract weekend break stays and long stay corporate business at this time of year.
- Strong demand for touring caravanning and camping in Sussex during the main summer months and at weekends between May and September if the weather is good. There are frequent shortages of provision at such times. Occupancy levels have dropped for the Northbrook Farm Caravan Club site in Worthing due to the lack of investment in the site in recent years. The Caravan Club is however keen to invest in the site to achieve stronger occupancy levels, if it can secure a long lease from Worthing Borough Council.
- Some demand for holiday home ownership at the Beach Park holiday park in Lancing. Other holiday parks in Sussex have found a growing market for holiday home rental in recent years.

The study showed the following potential opportunities for the development of different types of visitor accommodation in Adur & Worthing:

Hotels

- The redevelopment of the Beach Hotel on Worthing seafront, which opened as an 81-bedroom Premier Inn budget hotel in December 2015;
- Potential interest from other national budget/ limited service hotel operators that might be interested in a hotel operating opportunity as part of one of the major regeneration schemes, most likely on a franchise basis;
- Scope possibly for a small, upmarket boutique hotel in Worthing, possibly through the repositioning of an existing small hotel or large guest house;
- A need for the existing hotels in Worthing to modernise their offer to meet customer expectations and compete effectively. The Ardington and Chatsworth were already progressing investment plans to meet this requirement. The Burlington was considering a possible bedroom extension and spa development.
- Potential in the rural parts of Worthing/the South Downs National Park for the Worthing or Hill Barn Golf Clubs to develop some form of hotel accommodation, subject to environmental considerations and the views of the South Downs National Park Authority.
- Potential for a budget hotel in Shoreham-by-Sea

Pub Accommodation

- Scope for some additional pub accommodation provision in Worthing, Shoreham-by-Sea and Lancing.
- A need for some existing pub accommodation establishments to upgrade the quality of their guest bedrooms to meet market expectations.
- Potential for a gastropub with boutique bedrooms in Shoreham-by-Sea.
- Scope for national pub companies to develop hotel bedrooms in conjunction with pub/restaurant development projects that they may progress in Worthing, Shoreham-by-Sea or Shoreham Harbour.

Guesthouses and B&Bs

- A clear case for seeking to retain existing good quality, well located guesthouses in Worthing unless the opening of new budget/limited service hotels significantly erodes the demand for guesthouse and B&B accommodation in the town.
- Scope for additional guesthouses and B&Bs in Worthing to meet current shortages and replace any that close – subject to the impact of new budget/limited service hotels that open in the town.
- Potential for additional guesthouse and B&B provision in Shoreham-by-Sea, again subject to the impact of a budget hotel opening here.
- A need for the continual upgrading of existing guesthouses and B&Bs and for new operators to provide high quality accommodation, to meet constantly rising customer expectations.
- Scope possibly for some 5 star and boutique B&B accommodation in Worthing and Shoreham-by-Sea.
- Potential for guesthouses and B&Bs to develop family rooms and suites to cater for the family market.
- Scope possibly for farmhouse B&Bs in the rural parts of Adur & Worthing/ the South Downs National Park, if there are farming families here that wish to provide such accommodation.

Self-Catering Accommodation

- Potential for additional high quality, modern self-catering apartments, holiday homes and beach houses.
- Scope for some serviced apartments to meet long stay corporate demand.
- Potential for some boutique self-catering apartments and holiday homes and luxury/boutique beach houses.
- An opportunity for some 'super' holiday homes that can cater for large family and friends get togethers.
- Potential for some 'Access Exceptional' self-catering accommodation, purpose-designed for independent wheelchair users.
- Possible opportunities in the rural parts of Adur & Worthing/ the South Downs National Park for the conversion of redundant agricultural buildings to self-catering accommodation.

Touring Caravan & Camping Sites

- A clear market potential for, and Caravan Club interest in, the continued operation and upgrading of the Northbrook Farm touring caravan site, subject to a new long-term lease from Worthing Borough Council.
- Potential in the rural parts of Adur & Worthing/the South Downs National Park for additional small scale caravanning and camping provision in terms of certificated sites; small touring caravan and camping sites; eco camping sites; small camping pod operations; and camping barns/ bunkhouse accommodation.
- A possible opportunity for a surfing pod development at Shoreham or Lancing Beach.

Glamping

- Scope for some glamping provision in the rural parts of Adur & Worthing/the South Downs National Park.

Holiday Parks

- A need for continued investment in Beach Park to meet customer expectations.
- Potential for the introduction of holiday homes for hire at Beach Park to cater for demand from holidaymakers, kite surfers and other watersports enthusiasts.
- Possible scope for Beach Park to operate over a longer season and possibly year-round, given adequate safeguards to prevent permanent residential occupation of caravan holiday homes and lodges.

Hostel Accommodation

- The development of the proposed hostel, watersports centre and café at Beach Green could help to develop the market for accommodation from kite surfers and watersports markets and may attract other group markets that may require low-cost accommodation in the Shoreham-by-Sea area.

The study made a number of recommendations in relation to planning policy and process for hotel and visitor accommodation development in Adur and Worthing:

- The study endorsed the Visitor Economy Policy (Policy 39) in the Worthing Core Strategy as providing adequately for hotel and visitor accommodation development in Worthing Borough, particularly in terms of focusing hotel development on Worthing town centre and seafront.
- The study supported the ongoing case for seeking to retain visitor accommodation in Worthing through the Sustainable Economy SPD, although suggested a need for some flexibility over the next few years, while the country has been coming out of the recession, and depending on the impact of the new Premier Inn on the seafront.
- The study endorsed the Visitor Economy Policy (Draft Policy 26) in the Revised Draft Adur Local Plan 2013. It was suggested that the supporting text to the policy could be usefully updated to include reference to the findings of the Hotel & Visitor Accommodation Futures Study.
- The study suggested that Adur District Council might wish to reconsider its planning policy approach to Shoreham Airport in terms of the potential to allow a hotel here. It also recommended that Adur should reconsider whether a hotel should be encouraged in the Western Harbour Arm of Shoreham Harbour, given the challenges of bringing forward other uses here, and the potential for hotels to come forward on other sites in Shoreham-by-Sea.
- The study showed no clear need for a visitor accommodation retention policy in Adur and no clear need to allocate sites for hotel development in either Adur or Worthing.
- It was recommended that the opportunities for visitor accommodation development in those parts of Adur & Worthing that fall within the South Downs National Park should be communicated to the National Park Authority for its consideration in the drafting of the South Downs National Park Local Plan.

In addition to these planning policy recommendations, the study identified a number of other roles that Adur & Worthing Councils and their public sector partners can play to more proactively support the development of the hotel and visitor accommodation sector in terms of:

- Disseminating the study findings to existing and prospective new accommodation business operators, perhaps reformatted as a series of Accommodation Development Fact Sheets;
- Circulation of the report to all relevant Council officers and members and appropriate interested public sector bodies and other agencies;
- The provision of tailored business support and quality improvement initiatives for the visitor accommodation sector;
- The development of the corporate market through the progression of office and business park development projects and the attraction of occupiers that will generate strong demand for accommodation;
- Product development in Worthing to attract off-peak leisure break business in terms of events and festivals outside the main summer season and indoor and wet weather attractions and activities aimed at markets that have the propensity to visit at off peak times;
- The development of the evening economy in Worthing and in Shoreham-by-Sea to enhance the town as a base for visiting Brighton;
- The development of facilities for kite surfing and other watersports at Shoreham and Lancing. Further research is first needed to better understand the accommodation requirements of kite surfers and watersports enthusiasts and to more clearly identify the scale and nature of opportunity that these markets present for accommodation operators in Adur & Worthing;
- Effective marketing to attract off peak leisure break business, possibly using events and festivals as the key hook to motivate visits and encourage extended stays;
- A review of the potential to secure a hotel as part of one of the major regeneration schemes in Worthing;
- Discussions with Premier Inn and Travelodge and the owners of potential hotel sites in Shoreham-by-Sea to present them with information on the market opportunity for a budget hotel in the town;
- A decision on the future of the Northbrook Farm Caravan Club site;
- An ongoing need to monitor hotel and visitor accommodation development in the District and periodically update the Hotel & Visitor Accommodation Futures Study.

3. CHICHESTER HOTEL FUTURES (2006)

The Chichester Hotel Futures Study was commissioned in 2005 by Chichester District Council, with funding support from Tourism South East. The purpose of the study was to identify the need for new hotel development across Chichester District through until 2023, to coincide with the Local Development Framework timeframe. The study was used to inform the Council's planning policy approach to hotel development and retention.

In terms of hotel performance and market demand, the study showed:

- Average annual room occupancies and achieved room rates for Chichester's 3/4 star hotels that were broadly on a par with national averages, but varied depending on hotel quality, with higher quality hotels performing much better. Demand for full-service hotels in Chichester is seasonal, with hotels busy and often filling between April and September, particularly at weekends. The Chichester hotel market is largely leisure driven. Chichester is a popular weekend break destination: hotels are able to command high room rates at weekends.
- 3 star hotels in Midhurst were achieving low levels of occupancy. Demand here is highly seasonal and leisure-focused.
- Chichester's budget hotels were achieving very high room occupancies and consistently filling and turning away significant business, both during the week and at weekends. They attract a mix of corporate and contractor demand during the week, and a mix of leisure break stays and demand from people attending weddings and family occasions or visiting friends and relatives at the weekend.
- High quality boutique inns were achieving very high room occupancies and room rates.
- The market for hotel accommodation on the Manhood Peninsula did not appear to be particularly strong and was largely seasonal. Demand was mainly from people visiting friends and relatives or attending weddings and family celebrations. There was also some demand for leisure breaks on the coast and some business and contractor demand.

The study identified potential for the following in terms of new hotel development in the District over the 5-18-year period that followed its publication (now 9 years ago):

- A boutique hotel of around 50 bedrooms in Chichester city centre, and possibly longer term potential for further boutique hotels in the city, given suitable properties for conversion;
- A second sizeable (100 + room) budget hotel in Chichester, and possible scope for a third budget hotel in the longer term;
- Possible scope for luxury country house hotels, given suitable properties;
- Potential for further high quality pub accommodation;
- Scope for bedroom extensions to existing hotels, and the development of conference, function, leisure and spa facilities;
- Potential possibly for more niche hotel offers such as Warner's adult only hotels and luxury family hotels, given the strong performance of these types of hotel elsewhere.

Locationally, the greatest opportunities for new hotel development were identified as being in Chichester, due to its strength as a leisure break destination, and its role as the main focus of corporate activity and possible future business development. The study did not identify any clear potential for new hotel development in Midhurst. The opportunities here were considered to be more in terms of the upgrading and further development of existing hotels, and possibly some high quality pub accommodation. It was suggested that there could be scope for a small quality hotel or quality pub accommodation operation in Petworth, primarily to cater for leisure break business and local weddings trade.

The study made a number of recommendations for the District Council to:

- Plan positively for hotel growth through the Local Development Framework (now superseded by the Local Plan 2014-2029, which includes positive planning policies for tourist accommodation development);
- Introduce a hotel retention policy in the Local Development Framework in order to resist the loss of hotels to alternative uses, in particular residential. The current Local Plan 2014-2029 includes such a policy;
- Undertake work to identify, bring forward and possibly allocate in the Local Plan suitable sites for hotel development: the lack of hotel sites and pressure on land from alternative uses, especially residential development, was identified as a key barrier to realising the potential for hotel development in Chichester;
- Progress work to build a dialogue with potentially interested target hotel companies;

- Strengthen the demand for hotel accommodation in the District through attracting companies and business uses that will generate demand for corporate hotel stays and developing off-peak leisure business.

Since 2006, the only significant addition to Chichester's hotel stock has been a 100-bedroom Travelodge budget hotel in the town centre, meeting the requirement for such a hotel that the Hotel Futures Study identified. There have however been a number of changes in terms of the repositioning of existing hotels. Harbour Hotels reopened the former Ship Hotel in the city centre in March 2016 as the luxury boutique Chichester Harbour Hotel. This hotel meets the sort of requirements that was identified in the Hotel Futures Study for a boutique hotel in the city centre. The Goodwood Estate has ended its management contract with Marriott Hotels and now operates The Goodwood Hotel as an independent 4 star hotel. The former Ramada hotel is also now operated as an independent hotel – the Chichester Park Hotel.

4. SOUTH DOWNS NATIONAL PARK VISITOR ACCOMMODATION REVIEW (2014)

This study was commissioned by the South Downs National Park Authority to inform the development of the emerging South Downs National Park Local Plan and the delivery of the Partnership Management Plan regarding the opportunities and requirements for building the future capacity, quality and profitability of the visitor accommodation sector across the National Park.

The study provided evidence of:

- A visitor accommodation sector that is performing very strongly at weekends and during the week in the peak summer months, with frequent shortages of all types of accommodation at these times.
- Strong demand for high quality accommodation, which generally trades at the highest levels of occupancy and price.
- Clear prospects for future growth in the demand for all types of visitor accommodation in the National Park.
- Good potential for the South Downs to capitalise on many of the current and emerging rural visitor accommodation development trends.
- Some clear gaps in current accommodation provision.
- Strong interest from national, regional and local visitor accommodation developers, operators and investors, as well as from land and property owners interested in visitor accommodation development.
- A largely leisure driven and seasonal market for visitor accommodation in the National Park, suggesting a need for incremental supply growth in order to avoid overly diluting winter trade.

The study showed the following opportunities and priorities for investment in existing accommodation businesses:

Hotels

- Refurbishment and upgrading, including repositioning to boutique hotels in some cases;
- Bedroom extensions to meet peak period demand;
- The development of leisure and spa facilities to boost appeal for leisure breaks.
- The development of banqueting facilities to help develop weddings and functions trade.
- Expanded or new restaurant capacity.

Inns/Pub Accommodation

- Refurbishment and upgrading, including repositioning to boutique inns in some cases;
- The opening of additional en-suite guest bedrooms.

B&Bs/ Guest Houses

- Refurbishment and upgrading, including repositioning to a boutique standard in some cases;
- Expansion in terms of opening up additional en-suite bedrooms or the provision of accommodation units in gardens and grounds e.g. camping pods or glamping units.
- Development of facilities for walkers and cyclists e.g. drying rooms and cycle storage.

Holiday Cottages

- Refurbishment and upgrading;
- The opening of additional units;
- The development of leisure facilities, e.g. swimming pools, games rooms, saunas, at holiday cottage complexes.

Touring Caravan and Camping Sites

- Continuous investment in site infrastructure, landscaping, toilet and shower blocks, and other on-site facilities such as laundry rooms and children's play areas.
- The expansion of existing touring caravan and camping sites, where they have land available, to cater for demand at peak times. Many sites are frequently full and turn business away at weekends and during school holiday periods. The expansion of sites may make them more viable and allow investment in site facilities.
- The development of existing larger child-friendly sites in terms of adding leisure facilities, games rooms and children's activities.
- The introduction of eco-activities e.g. nature study, foraging.
- Improving green credentials through measures such as the use of biomass, solar or wind energy, composting, recycling, and planting to improve biodiversity.
- The provision of more hard standings for touring caravans and motor homes to enable sites to extend their season and allow trading during periods of wet weather and into the winter months.

- Additional seasonal tourer pitches[1], which can provide sites with a good base of guaranteed income, whatever the weather.
- The introduction of camping pods and/or some form of glamping units.
- The development of permanent on-site accommodation for site managers for the purposes of winter opening, site security and maintenance.
- The extension of site operating seasons into the winter months and possibly year-round operation.

Glamping Operations

- Expansion through the provision of additional glamping units.
- The extension of the operating season for glamping sites, including perhaps to year-round trading.
- The development of facilities such as shops, meeting rooms and indoor leisure facilities.
- The provision of staff accommodation to help glamping sites develop midweek and winter business.

The research findings also showed good potential for the development of new accommodation businesses of all types in order to meet current peak period shortages and capitalise on rural visitor accommodation development trends: without new accommodation supply tourism growth in the National Park will clearly be constrained.

In terms of the opportunities for new visitor accommodation development in those parts of Coastal West Sussex that fall within, or border the National Park, the research findings show the following:

Hotels

- Scope for a boutique hotels in Arundel, through the repositioning of an existing hotel or the conversion of a suitable building.
- Potential for the development of luxury and/or boutique country house hotels, given suitable country house properties for conversion. This could also include conversion to luxury family hotels and/or spa hotels.
- Scope for the development of hotels on golf courses.

[1] Where owners leave touring caravans on a site for the season to use them periodically for weekend stays, midweek breaks and holidays.

Inns/Pub Accommodation

- Clear potential for futher pubs in, and surrounding the National Park to offer letting bedrooms either within their premises, through the conversion of suitable outbuildings, or possibly in terms of small-scale new-build guest bedroom extensions. This includes the development of new boutique inns.

Restaurants with Rooms

- Potential for the development of high quality, possibly boutique guest bedrooms linked to existing or new restaurant operations.

B&Bs/ Guest Houses

- A need for new B&Bs and guest houses to replace those that close as their owners retire. The priority will be high quality, en-suite B&Bs and guest houses, including some 5 star and boutique establishments.
- Possible scope for the development of B&B for Horses businesses in the rural parts of the National Park. These are B&Bs that also provide stabling and pasture for horses.

Holiday Cottages

- Clear potential for additional holiday cottages to meet peak season demand, in terms of barn conversions and the letting of residential properties. There could be potential for all standards of holiday cottage but the priority should be for high quality accommodation, including some 5 star, fully en-suite and boutique holiday cottages.
- Scope for some 5 star holiday cottage complexes with leisure facilities.
- Potential for more 'super cottages' that can cater for the growing demand for large family and friendship get togethers, celebrations and house parties.
- Scope for some 'access exceptional' self-catering cottages that are specially designed for independent wheelchair users. The market for such accommodation is quite niche however, so significant provision is not warranted.

Holiday Lodges

- Potential for holiday lodge development in terms of:
    - Individual rental holiday lodges or small complexes of them;
    - Woodland or lakeside holiday lodge parks with lodges for ownership and/or rental. Relatively modest scale holiday lodge parks are likely to be most appropriate in the National Park. It is likely to be difficult to find sites where large-scale holiday lodge parks could be acceptably developed in planning terms.
    - Eco lodges, small complexes of eco lodges and eco lodge parks;
    - Fishing lodges associated with existing or new fishing lakes;
    - Golf lodges on golf courses, for rental, timeshare or purchase.
    - Shooting lodges on country sports estates.

Treehouses

- Scope potentially for some treehouse developments in suitable woodland and forest settings.

Caravan Holiday Home Parks

- Likely interest from national holiday park operators in developing new caravan holiday home parks in the South Downs for ownership and/or rental if potential development sites are available. Given the sensitivity of the landscape in the National Park and the fit with the wider offer and target markets, encouraging suitable scale holiday lodge park developments might be deemed more appropriate however.

Wellness Retreats

- Scope for the development of wellness retreats in the South Downs.

Touring Caravan and Camping Sites

- Potential for:
    - Further small scale touring caravan and camping sites in the National Park (of up to 30-50 pitches) and further certificated sites[2], particularly on farms and next to country pubs.
    - More camp sites;
    - The development of eco camping sites - small, low impact, environmentally-friendly, off-grid sites.

Camping Pods

- Potential for small camping pod sites.

Glamping

- Clear scope for the development of further glamping sites.

Group & Youth Accommodation

- Scope for the development of residential activity centres linked to outdoor pursuits and water sports centres.
- Potential for further children's activity holiday centres, given suitable properties and sites.

[2] 5 pitch sites that are certificated to operate by the Caravan Club or Camping and Caravanning Club without the need for planning permission

The study sets out a clear case for the National Park Authority to support visitor accommodation development in order to:

- Improve the vitality of the National Park's towns and villages, particularly in terms of helping to boost their evening economies;
- Keep village and country pubs open and viable, maintaining them as a resource for local communities;
- Improve farming and country estate incomes and thus supporting agriculture and land management;
- Create jobs for local people and self-employment opportunities;
- Sustain existing tourism and leisure businesses, such as golf courses, fishing lakes, horse riding stables, wedding venues and visitor attractions;
- Find new uses for redundant and even derelict buildings and sites.

The study makes a series of planning policy recommendations in terms of:

- Planning positively for the development of the full range of potential visitor accommodation offers that there is potential for in the National Park;
- Formulating an appropriate planning policy for static caravan parks;
- Developing a consistent planning policy approach in the South Downs 5km Buffer;
- A planning policy approach that facilitates year-round operation of accommodation businesses;
- Policies that recognise the need for on-site staff accommodation for rural accommodation businesses;
- The need for a robust accommodation retention policy;
- A simple and responsive planning application process;
- Consideration of enabling development to achieve viable accommodation development projects.

The study ends with a series of recommendations for public sector intervention to help accelerate investment in visitor accommodation in the National Park and boost off-peak accommodation demand, including:

- Identifying suitable sites for large-scale visitor accommodation schemes;
- A South Downs pub accommodation development programme;
- A glamping development programme;
- Business support for the visitor accommodation sector;
- A clearly articulated tourism strategy for the South Downs;
- Destination marketing to boost off-peak business;
- Product development with off-peak appeal;
- Periodic reviews of the study to evaluate the impact of any interventions and establish ongoing opportunities and priorities.

APPENDIX 2

COASTAL WEST SUSSEX
Relevant National Hotel & Visitor Accommodation Development Trends

Prepared for:
Coastal West Sussex Partnership

August 2016

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HOTEL & VISITOR ACCOMMODATION DEVELOPMENT TRENDS IN THE UK

Hotels

Hotel Development in Historic Towns & Cities

National trends in hotel development in historic towns and cities of a comparable size to Chichester and Arundel have been as follows:

- **Premier Inn and Travelodge budget hotels** have opened in many historic towns and cities over the last three years, including Winchester, Canterbury, Lincoln, Worcester, Dorchester, Exeter, Colchester, Beverley, Lewes, Cheltenham and Harrogate, and one or other, or both companies continue to target other similar sized historic towns and cities, including Salisbury, Tunbridge Wells, Sevenoaks, Rye and Guildford, together with second or third hotels in the major historic cities of Bath, York, Chester, Cambridge and Oxford. Chichester is target for a second hotel for Premier Inn.

- **Other budget hotel brands** (Ibis, Holiday Inn Express, and Hampton by Hilton) tend to build larger hotels and have so far only opened in, or targeted the larger historic cities. Exceptions are Lincoln, which has an Ibis budget hotel and a Holiday Inn Express upper-tier budget hotel, and Canterbury, which has a Holiday Inn Express and a proposed 130-bedroom Hampton by Hilton upper-tier budget hotel that was granted planning permission in August 2015.

- The other key trend in historic town and cities has been the opening of **boutique hotels,** either through the repositioning of existing hotels, or the conversion of suitable properties. Hotel du Vin opened its first boutique hotel in Winchester in 1994 (www.hotelduvin.com/locations/winchester). The company has since gone on to open hotels in other historic towns and cities, including Tunbridge Wells, Cheltenham, Exeter and Harrogate, and is currently progressing a new hotel in Stratford-upon-Avon. Other examples of boutique hotels in comparable historic towns and cities include:
    - One Warwick Park in Royal Tunbridge Wells (www.onewarwickpark.co.uk)
    - The George in Rye (www.thegeorgeinrye.com)
    - Pelham House, Lewes (www.pelhamhouse.com)
    - Greyfriars in Colchester (http://greyfriarscolchester.co.uk);
    - Charlotte House Hotel, Lincoln (www.charlottehouselincoln.com)
    - ABode Canterbury (www.abodecanterbury.co.uk
    - The William Cecil, Stamford (www.hillbrookehotels.co.uk/the-william-cecil)

- Major hotel companies are also starting to look at opening **branded boutique** hotels in historic cities. InterContinental Hotels Group (IHG) has opened a Hotel Indigo in York and is currently progressing Hotel Indigo boutique hotels in Bath and Durham. In Cheltenham, Frasers Hospitality has rebranded the Montpelier Chapter boutique hotel that it acquired in 2015 under its Malmaison boutique hotel brand.

Hotel Development in Seaside Resorts

National trends in hotel development in UK seaside resorts are as follows:

- **Budget hotels** have continued to open in UK resorts. Premier Inn has opened new hotels in 2015 and 2016 in Sandown on the Isle of Wight, Worthing, Clacton-on-Sea, Great Yarmouth, Exmouth, Tenby and Southend-on-Sea, while Travelodge has opened in Weston-Super-Mare and Ryde on the Isle of Wight. Target seaside resorts and towns in Coastal West Sussex for one or other of these brands are Bognor Regis, Littlehampton and Shoreham-by-Sea.

- Other budget hotel brands have opened in larger resorts, including an Ibis Styles budget boutique hotel in Blackpool; a Hampton by Hilton upper-tier budget hotel in Bournemouth and another planned to open in Blackpool in 2017; and a new Ibis budget hotel that opened in Brighton in 2013. These brands tend to operate larger hotels, typically of 100-150 bedrooms. They are unlikely to look at the seaside resorts and towns in Coastal West Sussex therefore, other than possibly Worthing.

- Another key trend has been the development of **small, independent boutique hotels**, primarily through the repositioning of existing hotels and guest houses, but in a few cases through the conversion of suitable properties. Examples include:

  - The Mercer Collection of 7 small boutique hotels in Southsea (www.themercercollection.co.uk);
  - The Crescent Victoria Hotel in Margate (www.crescentvictoria.co.uk) and Crescent Turner in Whitstable (www.crescentturner.co.uk);
  - Sands Hotel, Margate (www.sandshotelmargate.co.uk);
  - Albion House, Ramsgate (www.albionhouseramsgate.co.uk);
  - Hotel Alexandra, Lyme Regis (www.hotelalexandra.co.uk);
  - Artist Residence, Penzance (www.artistresidencecornwall.co.uk);
  - The Pig on the Beach, Studland, Dorset (www.thepighotel.com/on-the-beach).
  - Idle Rocks, St Mawes, Cornwall (www.idlerocks.com);
  - Cliff House Hotel, Southbourne, Dorset (www.cliffhouse-hotel.com).

- There has been some activity in terms of **branded boutique hotels**, but only in major resorts. InterContinental Hotels Group (IHG) is opening a Hotel Indigo boutique hotel in Brighton later in 2016, while the former Hotel Seattle at Brighton Marina has been converted to a Malmaison boutique hotel.

- There has been some recent activity in terms of new **4 star hotel** openings and development proposals in larger seaside resorts. A £60m, 172-bedroom Hilton 4-star hotel opened in Bournemouth in December 2015. In Blackpool, plans have been unveiled for a 96-bedroom luxury hotel on the site of the former Palantine Hotel.

- Another trend in seaside resorts has been the **acquisition of resort hotels by coach holiday companies**. Daish's acquired two hotels in Weymouth in 2014, following its acquisition of The Claremont in Eastbourne in 2013. Britannia Hotels acquired The Cavendish in Eastbourne in 2015 and two hotels in Scarborough in 2012. Leisureplex Hotels acquired the Shanklin Hotel on the Isle of Wight in 2014.

- Another trend that could be relevant for coastal locations in Coastal West Sussex has been the development of **hotels at holiday parks and holiday centres**. Butlin's has now opened three contemporary hotels at its holiday centre in Bognor Regis. Park Resorts' Southview Holiday Park in Skegness in Lincolnshire has an on-site 3 star hotel with 59 bedrooms. Weymouth's Waterside Holiday Group is currently developing a boutique hotel at its Osmington Holiday Park. The Richardson's Group has unveiled plans for a 260-bedroom hotel as part of the redevelopment of the Seacroft Holiday Village at Hemsby on the north Norfolk coast.

Rural Hotel Development

Hotel development trends in rural locations are as follows:

- At the top end of the market there has been activity in terms of the development of **luxury country house hotels**, including the opening of Lime Wood in the New Forest and the soon to open Heckfield Place near Hook in Hampshire; the £30 million development of the Raithwaite Estate in North Yorkshire as a luxury hotel and spa; the 22-bedroom, 5 star Villa Levens country house hotel to the south of Kendal in Cumbria that opened in October 2015; the Barton Hall Hotel that opened in Northamptonshire in 2014; the opening of the Ellenborough Park Hotel & Spa near Cheltenham in 2011; the redevelopment in 2012 of Wood Norton Hall near Evesham as a country house hotel; and the £30million development of The Cornwall Hotel, Spa and Estate at St Austell. Plans have also been unveiled for the development of new luxury country house hotels in Surrey (the conversion of Cherkley Court near Leatherhead); West Yorkshire (involving the conversion of Bretton Hall near Wakefield); Wigan (the transformation of the Haigh Hall stately home into a luxury boutique hotel; Cheshire (the restoration and conversion of Doddington Hall near Nantwich into a 120-bedroom 5 star country house hotel); North Yorkshire (the conversion and extension of Grantley Hall near Harrogate into a 51 suite luxury hotel and spa); the Lake District (the 22-bedroom Villa Levens near Kendal, converted from a former nuns retreat); Herefordshire (Brooks Country House at Ross-on-Wye); and North Wales (the conversion of Palé Hall into an 18-bedroom luxury hotel and restaurant) .

- A number of country house hotel companies have expanded in the last 3 years. Brownsword Hotels has established the Gidleigh Collection of luxury country house hotels following its acquisition of 4 hotels previously owned by the now defunct Von Essen Hotels company. Hand Picked Hotels has acquired three new country house hotel properties near Bath and in Guernsey and Northamptonshire. Laura Ashley Hotels has opened two country house hotels in Elstree in Hertfordshire in 2013 and Windermere in the Lake District in 2014. The Northamptonshire-based Hazleton Group of Companies opened the Barton Hall Hotel near Kettering in Northamptonshire in 2014 to add to the Rushton Hall Hotel that it opened in 2006.

- **Hotel spas** have been developed at many luxury country house hotels, enabling them to tap into the rapidly expanding UK spa breaks market.

- There has been some activity in terms of the development of **alternative accommodation options at luxury country house and golf hotels** e.g.

    - Tree houses at Chewton Glen in Hampshire;
    - Eco pods at the Old Thorns Manor golf hotel at Liphook in Hampshire;
    - Luxury self-catering apartments at the Four Pillars Cotswold Water Park hotel in Gloucestershire;
    - Luxury woodland holiday homes at The Cornwall Hotel & Spa at St Austell in Cornwall;
    - Eco lodges for ownership or rental adjacent to the Barnsdale Lodge hotel in Rutland;
    - An eco-friendly prefabricated lodge at The Pig in the New Forest;
    - Bubble domes at the Finn Lough Resort in Fermanagh, Northern Ireland;
    - Luxury spa lodges at Gilpin Hotel & Lake House at Windermere in the Lake District;
    - Cedar lodge suites at the Alexander House Hotel in West Sussex.

- A number of luxury country house hotels with a strong reputation for their cuisine have opened **cookery schools** e.g. Lucknam Park, near Bath; Northcote in Lancashire; Le Manoir aux Quat'Saisons in Oxfordshire and Swinton Park in North Yorkshire.

- Recent years have also seen the opening of **on-site specialist sport and leisure facilities at luxury country house hotels** e.g. equestrian centres at the Four Seasons Hampshire, Lucknam Park and Coworth Park in Berkshire and falconry centres at Stapleford Park in Leicestershire, Lainston House near Winchester, and Peckforton Castle in Cheshire.

- Recent years have also seen the development of a number of smaller **boutique country house hotels through** the conversion of country mansions, upgrading and repositioning of existing hotels, or development of redundant outbuildings at country house properties. Examples include:
    - The Cranleigh at Bowness-on-Windermere in the Lake District (www.thecranleigh.com)
    - Thyme House, Southdrop, Gloucestershire (www.thymeatsouthrop.co.uk)
    - The Coach House Hotel, Middleton Lodge, near Richmond, North Yorkshire (www.middletonlodge.co.uk)
    - Visit England's 'Best Small Hotel' 2014, The Old Rectory Hotel, Martinhoe, Exmoor National Park (www.oldrectoryhotel.co.uk)
    - The Clive at Bromfield, near Ludlow in Shropshire (www.theclive.co.uk)
    - Tottenham Mill, near Newmarket in Suffolk (www.tuddenhammill.co.uk)
    - Forest Side in the Lake District (www.theforestside.com)

- In market towns, a number of hotel have been repositioned as **boutique and town house hotels**, in some cases with hotel spas, e.g.
    - The George Hotel at Stanbrook (www.thegeorgehotelkent.co.uk);
    - The Priory Hotel, Wareham (www.theprioryhotel.co.uk)
    - The White Horse in Romsey in Hampshire (www.thewhitehorseromsey.co.uk);
    - The Feversham Arms in Helmsley in North Yorkshire (www.fevershamarmshotel.com);
    - The 'country chic' Kings Head hotel that the Vineyard Group opened in Cirencester in September 2014 (www.kingshead-hotel.co.uk);

- Some **regional boutique hotel chains** that are focusing on market town and rural locations have also emerged e.g. The Pig boutique hotel company with five hotels in the New Forest, Southampton, Studland Bay in Dorset, Honiton in Devon, and near Bath; Milsom Hotels, which has 4 boutique hotels in Suffolk and Essex; Hillbrooke Hotels, which operates 4 'quirky luxury' hotels in the New Forest, Berkshire and Lincolnshire; and Flat Cap Hotels in Cheshire, which operates one hotel in Holmes Chapel and is progressing plans for a second hotel in Knutsford.

- **Luxury Family Hotels** was re-established in 2011 with the purchase of the Polurrian Hotel in Cornwall and the re-acquisition out of administration of 7 hotels that had previously been sold by the company to Von Essen Hotels in 2006. The company focuses on the upper end of the family break market with a luxury country house hotel product that is geared towards children.

- **Warner Leisure Hotels**, the company that specialises in hotels catering for the adult-only leisure break market has unveiled plans for a £30m redevelopment and extension of Studley Castle in Warwickshire into a new hotel. It has also invested heavily in its existing hotels in 2015, with the addition of 45 luxurious garden lodges at Bodelwyddan Castle in North Wales and a £12.5 m investment to upgrade and expand its Alvaston Hall Hotel in Cheshire, which has included the opening of an additional 113 guest bedrooms.,

- **Golf resorts** have opened in some counties e.g. Mere Golf Resort in Knutsford in Cheshire, Rockcliffe Hall near Darlington. A number of proposals have come forward for new golf resorts in various locations across the UK, including Kent (at the London Golf Club), Hertfordshire (at the Hertfordshire Golf & Country Club), Surrey (a proposal for a 100-bedroom Hilton hotel as part of the new regional headquarters of the PGA at Wildwood Golf & Country Club in Cranleigh), North Yorkshire (the Flaxby Country Resort on the existing Flaxby Golf Course near Knaresborough) and the Wirral (at Hoylake), together with a number of proposals in Scotland.

- On a smaller scale there has also been some activity in terms of the development of **hotels on golf courses** e.g. a 43-bedroom hotel at the Bowood golf course, near Chippenham in Wiltshire in 2009; a 50-bedroom hotel at The Oxfordshire Golf Club near Thame in 2010; a 30-bedroom Best Western Plus hotel at the Magnolia Park Golf and Country Club in Buckinghamshire in 2014; a 40-bedroom hotel at the Sandford Springs Golf Club near Basingstoke in 2014; the Cotswolds Club opened the 34-bedroom Cotswolds Hotel & Spa at the Chipping Norton Golf Club in Oxfordshire in November 2015.

- There has been some activity in terms of the development of **spa hotels,** with The Lifehouse Spa & Hotel at Thorpe Le Soken in Essex and The Spa Hotel at Ribby Hall Village in Lancashire opening in 2011. In Scotland, Ballogie Estate Enterprises is developing the site of a former hotel into the Ballogie Hotel & Spa, with 40 guest bedrooms and a £1.7m standalone spa facility. The project is due to open in 2016.

Inns/ Pub Accommodation

Recent and emerging development trends in the UK pub accommodation sector are as follows:

- There has been a growth in the supply of **boutique inns** in historic towns and cities, market towns and rural villages, in terms of the conversion of pub premises to gastropubs with boutique guest bedrooms. Examples are:
    - No 5 Bridge Street, Winchester (www.idealcollection.co.uk/no5bridgestreet)
    - The Lion & Pheasant, Shrewsbury (www.lionandpheasant.co.uk)
    - The Grasshopper Inn at Moorhouse on the Surrey/Kent border near Westerham (www.grasshopperinn.co.uk)
    - The Five All, Filkins, Gloucestershire (www.thefiveallsfilkins.co.uk);
    - The Lord Crewe Arms, Blanchland, Northumberland (www.lordcrewearmsblanchland.co.uk _
    - The Packhorse Inn, Moulton, Suffolk (www.thepackhorseinn.com);
    - The Bell at Ramsbury, Wiltshire (www.thebellramsbury.com);
    - The Victoria, Holkham, Norfolk (www.holkham.co.uk/victoria);
    - Royal Oak, East Lavant, near Chichester, West Sussex (www.royaloakeastlavant.co.uk);
    - Cromwell Arms, Mainstone, near Romsey in Hampshire (www.thecromwellarms.com);
    - The Wild Rabbit, Kingham, Cotswolds (www.thewildrabbit.co.uk);
    - The Hand and Flowers at Marlow in Buckinghamshire (www.thehandandflowers.co.uk);
    - The Pheasant at Gestingthorpe in Suffolk (www.thepheasant.net);
    - The Plough, Kelmscott, Oxfordshire (www.theploughinnkelmscott.com);
    - Inn on the Square, Keswick, Cumbria (www.innonthesquare.co.uk);
    - Woolpack Inn at Warehorne, near Ashford in Kent (http://woolpackinnwarehorne.com) – Alastair Sawday's Pub with Rooms 2016/17.
    - Swan House, Beccles, Suffolk (http://swan-house.com)

- A number of **national pub companies have developed branded portfolios of inns**:
    - Greene King has upgraded many of the inns in its Old English Inns portfolio and is starting to look at the development of lodge accommodation alongside its existing and future Hungry Horse and Farmhouse Inn branded pub restaurants;
    - Daniel Thwaites has embarked on the development of its Thwaites Inns of Character chain of quality country inns;
    - Marston's operates a portfolio of 38 inns across the country under its Marston's Inns brand. It has opened lodges alongside the new-build pubs that that it opened in Chepstow and Aberystwyth in 2013 and has secured sites for the development of similar lodges alongside other new-build pubs that it is planning to open. It is targeting around 5 new budget hotel openings per year. The company launched the Revere Pub Company in 2013 as a premium pub brand, so far including 8 inns with boutique accommodation in Hampshire, West Sussex, Sheffield, Kent, Derbyshire, Worcestershire, East Yorkshire and Wiltshire.
    - Dorset-based brewer Hall & Woodhouse operates 33 hotels and inns in Dorset, Devon, Hampshire, Somerset, Surrey, Hertfordshire, West Sussex and Wiltshire. It has recently opened a new inn in the New Forest and is currently developing The Duchess of Cornwall boutique inn in Poundbury in Dorchester.
    - Fuller's operates 26 hotels and inns in London, Hampshire, West Sussex and the Home Counties. It has upgraded the accommodation at a number of its pubs over the last few years, including the development of luxury boutique bedrooms at a number of them.
    - Swindon-based brewer Arkell's operates 41 hotels and inns in Swindon, Wiltshire, Oxfordshire, Berkshire and Gloucestershire. It is investing in the refurbishment of these properties, as well as adding bedrooms to some of its pub estate.
    - The Spirit Pub Company, now part of Greene King, operates the budget Good Night Inns brand alongside 29 of its pubs across the country.
    - JD Wetherspoon operates 45 hotels and inns throughout the UK under its Wetherspoon Hotels brand. Its latest hotel openings are the 18-bedroom Crown Hotel in Worcester in August 2015; 9-bedroom Golden Lion in Rochester in Kent in November 2015; 12-bedroom Greenwood Hotel in Northolt in June 2016; and 22-bedroom Sandford House in Huntingdon in October 2016.
    - London-based brewer Young's operates 20 hotels and inns in London, Surrey, Hertfordshire and Wiltshire, including a number of boutique properties. It acquired the boutique Lamb at Hindon in Wiltshire in 2014 as part of the expansion of its hotel portfolio.

  - Brakespear has a portfolio of 28 inns across Oxfordshire, Berkshire, Buckinghamshire, Northamptonshire, Wiltshire and Kent, a number of which have seen recent investment to upgrade their bedrooms, including The George Townhouse in Shipston-on-Stour and Sheep on Sheep Street in Stow-on-the-Wold in 2016.
  - Shepherd Neame operates 14 hotels and inns in Kent.
  - The Coaching Inn Group has grown from two to ten sites since launching in 2007 as the Bulldog Hotel Group. It acquired three coaching inns in 2015, including two in North Yorkshire, and is planning to expand to 15 sites over the next 5 years after receiving a £20m investment from the Commer Group in January 2015. The Group acquired the 25-bedroom Golden Lion in St Ives, Cambridgeshire in April 2016.
  - Leased pub owner Punch is progressing plans to boost its accommodation business across the UK after a successful pilot scheme on the Isle of Skye, which involves an income sharing arrangement with the tenant. It has appointed two area managers with hotel expertise to push forward the accommodation side of the business in terms of hotels or pubs with rooms, depending on the number of rooms involved, segmented into value, mainstream and premium accommodation. Approximately 300 Punch sites have bedrooms, although not all would be suitable for the new model.

- A number of **regional pub accommodation companies** have developed in some parts of the country, acquiring and upgrading inns with rooms e.g. Sussex Pub Group; Cotswolds Inns & Hotels; Cozy Pubs in Essex; The Agellus Collection in Suffolk; The Chestnut Group and Anglian Country Inns in East Anglia; the Peach Pub Company across the Midlands; Oakman Inns & Restaurants with pubs and inns across Oxfordshire and Hertfordshire; Bedfordshire-based Epic Pubs; Miller's Collection, with three inns in Hampshire and Berkshire; The Inn Collection in the North East; Town & Village Hotels, which has two hotels in North Yorkshire, one in County Durham and one in Cheshire; Draco Pub Co in Somerset; Provenance Inn & Hotels in North Yorkshire; Ramblinns in Kent; and London-based pub company Faucet Inns, which has opened boutique inns in Southampton and Surrey. The London-based pub company Distinct Group acquired the Cromwell Hotel in Stevenage in December 2015, which it intends to reposition as a boutique hotel and gastropub. Cheltenham-based Lucky Onion acquired the Wild Duck in the village of Ewen in Gloucestershire in November 2015 to add to its No 131 The Promenade boutique hotel in Cheltenham and 14-bedroom Wheatsheaf Inn gourmet pub-restaurant with rooms in Northleach.

Restaurants with Rooms

The number of restaurants with rooms in coastal, historic and market towns and rural locations across England and Wales has gradually been increasing, with several new openings in the last 2 years, mostly with boutique bedrooms and in some cases self-catering accommodation. Examples include:

- Rocksalt in Folkestone www.rocksaltfolkestone.co.uk
- The Seaside Boarding House, Bridport, Dorset www.theseasideboardinghouse.com
- Restaurant James Sommerin, Penarth, South Wales www.jamessommerinrestaurant.co.uk
- The Gallivant, Camber Sands http://thegallivant.co.uk
- Rick Stein's Seafood Restaurant and St Petroc's Hotel in Padstow, Cornwall (www.rickstein.com/stay)
- The Marquis at Alkham in Kent www.themarquisatalkham.co.uk
- The Bakery at Tatsfield on the Surrey/Kent border near Westerham www.thebakeryrestaurant.com
- JSW Restaurant in Petersfield, Hampshire www.jswrestaurant.com
- Mr Underhill's, Ludlow, Shropshire www.mr-underhills.co.uk
- The Whitebrook, near Monmouth in Wales www.thewhitebrook.co.uk
- The County, Aycliffe Village, County Durham www.thecountyaycliffevillage.com
- The Painswick in the Cotswolds town of Painswick www.thepainswick.co.uk
- Reads Restaurant with Rooms, Faversham, Kent (www.reads.com)
- White Vine House, Rye, East Sussex (www.whitevinehouse.co.uk)
- La Fosse, Cranborne, Dorset www.la-fosse.com

Country House Wedding & Events Venues with Accommodation

Recent years have seen the opening of an increasing number of country house wedding venues with accommodation and the emergence of a number of companies that specialise in the development and operation of such venues. Examples include:

- The Tabor Group has converted the former South Downs Hotel at Trotton, near Petersfield into the Southdowns Manor wedding and events venue, with 8 guest bedrooms and suites and a honeymoon suite (www.southdownsmanor.co.uk). The group also operates 4 other wedding venues that have accommodation in Essex, Warwickshire and Suffolk (www.thetaborgroup.co.uk)

- The Nicolas James Group has redeveloped Froyle Park, near Alton in Hampshire into a wedding and events venue with 14 self-catering apartments (www.froylepark.co.uk). The company also operates Northbrook Park in Farnham, Surrey as a wedding venue with 10 adjacent eco-cottages (www.northbrookpark.co.uk)

- AmaZing Venues has opened Stanbrook Abbey in Worcestershire in 2015 as a wedding and events venue with 52 luxury bedrooms and a private bridal suite (www.amazingvenues.co.uk/venue/stanbrook-abbey). The company operates 5 other luxury wedding and events venues in Scotland, Wales and Hampshire (www.amazingvenues.co.uk)

- Clevedon Hall in Somerset opened as a wedding and events venue in November 2014 following a £2m makeover. It has 25 luxury bedrooms and suites (www.clevedonhall.co.uk).

- The former Mariners Hotel at Millbridge, near Frensham in Surrey has been converted into the Millbridge Court wedding venue, offering 7 boutique hotel bedrooms for the exclusive use of wedding parties (www.millbridgecourt.co.uk)

- The former Mannings Heath Hotel, near Horsham in West Sussex was converted into the Brookfield Barn wedding venue in 2015 (www.brookfieldbarn.co.uk). It has 7 boutique guest bedrooms for the use of wedding parties.

- The Percy Arms Hotel in Otterburn in Northumberland is currently being converted into a French chateau inspired wedding venue – Le Petit Chateau (http://le-petit-chateau.com). Once complete the venue will be able to accommodate weddings of up to 160 guests, and will offer 30 guest bedrooms.

- The Cooling Castle Barn wedding venue near Rochester in Kent offers 15 luxury bedrooms for the use of wedding parties (www.coolingcastlebarn.com/page/accommodation)

Guest Houses and B&Bs

The guest house and B&B sector is characterised by **a continual churn** of establishments as people enter and exit the sector, often pre-retirement. The last 20 years have seen a continuous improvement in the quality of guest houses and B&Bs in the UK, particularly in terms of the provision of en-suite bathrooms. Existing operators and new entrants have responded to rising customer expectations. It is now rare to find guest houses and B&Bs that are not fully or mostly en-suite.

More recent years have seen a reduction in commercial B&B and guest house supply in many destinations, with fewer people entering the sector to replace those that have retired or exited for other reasons. Although the reasons for this trend have not been researched, our research suggests that it could be to do with increasing competition from budget hotels; the establishment of airbnb, which provides people with a more informal way to let spare bedrooms to visitors; and the regulatory burden that can deter people from setting up a B&B.

An emerging trend in historic towns and cities, and rural and coastal destinations is the development of **boutique B&Bs**, offering luxury bedrooms and bathrooms that feature contemporary interior design; high quality, locally sourced breakfasts; and in some cases spa treatments. Examples include:

- Flowerdews, Winchester www.flowerdews.com
- Hannah's B&B, Winchester http://hannahsbedandbreakfast.co.uk
- Grays, Bath www.graysbath.co.uk
- Quidhampton Mill, Salisbury www.quidhamptonmill.co.uk
- The Barn at Roundhurst, Lurgashall, West Sussex www.thebarnatroundhurst.com
- The Linen Shed, Faversham, Kent www.thelinenshed.com
- Field Green Oast, Cranbrook, Kent www.fieldgreenoast.com
- The Reading Rooms, Margate www.thereadingroomsmargate.co.uk
- Chapel House, Penzance www.chapelhousepz.co.uk
- No 98 Boutique Hotel, Weymouth www.no98boutiquehotel.com
- Hastings House, St Leonards-on-Sea www.hastingshouse.co.uk
- The Cloudesley, St Leonards-on-Sea www.thecloudesley.co.uk
- The Relish, Folkestone www.therelish.co.uk

Holiday Cottages

In terms of holiday cottage sector development trends, the housing market has a significant impact on **residential properties let as holiday accommodation**, which form the largest proportion of the stock of self-catering holiday accommodation in the UK. The downturn in the residential property market during the recession resulted in a significant increase in the numbers of residential properties available to rent as holiday accommodation. With lower house prices owners were more interested in making their properties available as holiday lets than selling at a reduced price. With the residential property market now having recovered this trend has started to reverse.

The overall **quality** of the UK self-catering offer has improved significantly over the last 20 years. Customers are demanding ever higher quality and are prepared to pay for it. Many are now looking for standards of décor, furnishings, appliances and equipment that are at least as good as, if not better than what they have at home. Customers are increasingly looking for self-catering accommodation that can deliver a 'wow' factor. Self-catering property owners are recognising that they can achieve increased lettings and higher prices if they offer high quality accommodation. The supply of 4 and 5 star self-catering accommodation has thus been increasing. Specific quality improvements in self-catering accommodation have included:

- High quality fitted kitchens, kitchen appliances and equipment, dishwashers and washer/dryers;
- En-suite bathrooms, luxury bathrooms and wet rooms, power showers, whirlpool baths, and increasingly full en-suite properties;
- Flat screen TVs and DVD and Blu Ray players, Sky Plus TV, broadband Wi-Fi, gaming stations, iPod docks and sound systems;
- Hot tubs and saunas.

At the top end of the market self-catering operators have started to offer **extra services** such as the provision of meals, food hampers, private chefs and butlers for hire, daily cleaning services, beauty treatments and accepting online shopping deliveries for guests.

The **conversion of redundant farm buildings** to self-catering accommodation has been a key trend over the past 30 years, fuelled by farm diversification grants and a planning policy framework that has generally supported the re-use of redundant agricultural buildings. The supply of this form of self-catering accommodation continues to grow and looks set to increase further. Farmers have converted barns as single self-catering units and in some cases as self-catering complexes of 2-5 units. There are also examples of more extensive self-catering barn conversion complexes that often include leisure facilities such as games rooms, swimming pools, gyms and tennis courts. More recent self-catering barn conversions have tended to be of a high quality, usually achieving a 4 or 5 star grading and sometimes other quality awards.

Examples of luxury holiday cottage complexes with leisure facilities include:

- Bardown Farm, Wadhurst, East Sussex www.bardownfarm.co.uk
- Poppinghole Farm Cottages, Robertsbridge, East Sussex www.poppingholefarm.co.uk/cottages
- Breamish Valley Cottages, Alnwick, Northumberland www.breamishvalley.co.uk
- Frith Farm House at Otterden, near Faversham www.frithfarmhouse.co.uk
- Pilgrim Nook Holiday Cottages at West Studdal, near Dover www.pilgrimsnook.co.uk
- Manor Farmhouse at Milstead, near Sittingbourne www.themanorformhouse.com

Boutique self-catering is an emerging product development trend, mirroring the development of boutique hotels, inns, guest houses and B&Bs. Such accommodation trades at the top end of the UK holiday market and typically commands premium prices. Examples include:

- Honeypot, Petham www.mulberrycottages.com/cottage/holiday-cottages-in-kent/93406-honeypot
- The Butlery, Sandwich Bay www.uniquehomestays.com/unique/details.asp?id=2585
- The Folly, Didmarton, Gloucestershire http://thefollyluxurycottage.com/
- Agra Cottage, Healey, near Ripon www.selfcateringcottages.net
- The Reading Room, Long Compton, Warwickshire www.compton-house.co.uk
- The Peren, near Hay-on-Wye, Herefordshire www.theperen.com
- Windfall Cottage, Beckford, Gloucestershire www.windfallcottage.com
- Culls Cottage, Southdrop, the Cotswolds www.cullscottage.net

Examples of letting agencies specialising in boutique self-catering include:

- Unique Home Stays www.uniquehomestays.com
- Boutique Retreats www.boutique-retreats.co.uk – specialising in boutique self-catering in Cornwall.

Another emerging product development trend in the UK has been the growth in the supply of large **'super' cottages** that can accommodate parties of up to 20-30 guests. These can be large residential properties, e.g. manor houses that are let out as self-catering accommodation or large purpose-designed self-catering barn conversions. Such properties have developed to cater for the growing demand for family and friendship get togethers, celebrations and house parties. They generally trade at the top end of the market, offering high quality, luxury accommodation. They will include large living spaces and dining areas and usually feature the latest in home entertainment systems. Some also have leisure facilities in terms of swimming pools, games rooms and snooker rooms. Examples include:

- Manor Farmhouse, Milstead, near Sittingbourne http://themanorfarmhouse.com/
- Finchcocks Oast, Goudhurst www.finchcocksoast.co.uk
- The Canterbury Barn, Canterbury www.mulberrycottages.com/cottage/holiday-cottages-in-kent/80338-the-canterbury-barn
- Marris Barn, Thorganby Hall, Lincolnshire (www.thorganbyhall.co.uk/marris-barn)
- Tregulland in Cornwall (www.tregulland.co.uk)
- Pedington Manor in Gloucestershire (http://bigcottage.com/houses/pedington-manor)

A number of agencies and web-based directories have been established in the UK specialising in the letting and marketing of large self-catering properties. The key ones currently are as follows:

- Unique Home Stays (www.uniquehomestays.com)
- The Wow House Company (www.thewowhousecompany.com)
- House Party Solutions (www.housepartysolutions.co.uk)
- Acacia Cottages (www.acaciacottages.co.uk)
- The Country Castle Company (www.thecountrycastlecompany.co.uk)
- The Big Domain (www.thebigdomain.com)
- Group Accommodation (www.groupaccommodation.com)
- The Big Cottage Company (www.bigcottage.com)

The development of **Access Exceptional self-catering cottages** that are fully adapted for use by independent and assisted wheelchair users is a trend that has been very slow to develop in the UK, particularly given the growing numbers of wheelchair users that are looking to take holidays. Access Exceptional holiday cottages should include most of the following features:

- Wide doorways and corridors;
- Extra space for wheelchair users;
- Wheel-in showers, possibly with hoist rails;
- Bathrooms and toilets adapted for wheelchair users;
- Low-level kitchen counters;
- Ramps, lifts or stair lifts if needed.

Examples include:

- The Calf Shed, Bardown Farm, Stonegate, East Sussex (www.bardownfarm.co.uk)
- Mellwaters Barn, Bowes, County Durham (www.mellwatersbarn.co.uk)
- Treworgans Farm Holidays, Cornwall (www.treworgans.co.uk)
- The Hytte, Northumberland (www.thehytte.com)
- Windrush Barn, Manor Farm Holidays, Cumbria (www.manorfarmholidays.co.uk)
- Mitchelland Farm, Lake District (www.lakedistrictdisabledholidays.co.uk)
- Chestnut Lodge, Rosliston Forest lodges (www.roslistonforestrycentre.co.uk/home/lodges/chestnut-lodge/)
- Hoe Grange Holidays at Brassington in Derbyshire (www.hoegrangeholidays.co.uk/accessible-holidays)
- Our Bench, Lymington, New Forest, Hampshire (www.ourbench.co.uk)
- Nutley Edge Cottages, Uckfield, East Sussex (www.nutleyedge.org.uk/categories/accessible-cottages)

Holiday Lodges/ Holiday Lodge Parks

Holiday lodge parks offering timber holiday lodges for outright or timeshare purchase and/or rental are a new offer to emerge over the past 20 years. They have developed primarily in inland locations, often woodland or waterside settings and/or associated with other developments and activities such as marinas, golf courses (golf lodges), fishing lakes (fishing lodges), watersports or alongside hotels. Most holiday lodge parks are small – the average holiday lodge park covers 32.2 acres and has 35 lodges. Timber holiday lodges are generally seen as a more up-market and exclusive alternative to the traditional caravan holiday home: they are particularly popular with older and more affluent customers. Most holiday lodges have two or three bedrooms. Holiday lodge parks increasingly have a number of on-site leisure facilities, including restaurants, bars, swimming pools, gyms and children's play areas. Holiday lodges are generally purchased as second homes for holiday purposes. Most park operators offer a holiday rental service to owners and many make participation in such a service a condition of purchasing a lodge. Lodge owners typically live within 3 hours of their holiday lodge and are aged over 50. The lodge rentals market attracts a younger clientele, with rental holidaymakers most typically aged 31-50. The recession resulted in a significant slowdown in UK holiday lodge sales, with the reduced consumer confidence and falling house prices resulting in far fewer buyers for such holiday properties. Some operators changed their strategy to holiday letting as a result. With the recovery in the economy interest in holiday lodge ownership has returned.

There are a growing number of holiday lodge letting agencies and websites. The leading one is Hoseasons (www.hoseasons.co.uk/lodges), which has also developed the sub-brands of Autograph Lodge Holidays (www.autographlodgeholidays.co.uk) and Evermore Lodge Holidays (www.evermorelodgeholidays.co.uk). Others include Book Holiday Lodges (www.bookholidaylodge.co.uk) and its sister brand Lodges With Hot Tubs (www.lodgeswithhottubs.org.uk) and Just Lodges (www.justlodges.com).

Key holiday lodge park operators/developers in the UK are as follows:

- The Dream Lodge Group (www.thedreamlodgegroup.co.uk) – 7 sites in East Sussex, Essex, Norfolk, Suffolk, Cambridgeshire, Devon and Cornwall, and an eight under development in Berkshire.
- Forest Holidays – part of the Forestry Commission (www.forestholidays.co.uk/choose-a-cabin) – offers Golden Oak Cabins at 9 sites in Scotland, Wales, Gloucestershire, Hampshire and Nottinghamshire. Its most recent development has been a complex of 60 cabins in Blackwood Forest.). Planning permission was secured in October 2013 for a development of 78 forest cabins in Delamere Forest in Cheshire.
- Natural Retreats (www.naturalretreats.co.uk)has developed eco lodge parks in the Yorkshire Dales and North Scotland and luxury holiday home developments in Cornwall and North Wales.
- Darinian Leisure Resorts (www.darinian.co.uk) has two holiday lodge parks in Essex and the Yorkshire Dales offering luxury, contemporary lodges for rental and ownership.
- Tom Hartley Park Homes (www.tomhartleyparkhomes.co.uk), a holiday park operator with sites in the East Midlands and Home Counties is currently developing Ashby Woulds Lodges (www.ashbywouldslodges.co.uk) as a boutique leisure park with a first phase of 17 luxury holiday lodges for holiday home ownership.
- Lancashire-based holiday park operator Pure Leisure Group (www.pureleisuregroup.com) operates the South Lakeland Leisure Village holiday lodge park and two golf lodge developments in Cambridgeshire and East Yorkshire alongside 6 caravan holiday home parks in the Southern Lake District, Northamptonshire and East Anglia, some of which also offer holiday lodges for ownership or rental.
- Habitat First Group (www.habitatfirstgroup.com) is a family-run development company that focuses on developing luxury sustainable holiday home communities. The company's first project was the Lower Mill Estate at the Cotswolds Water Park in Gloucestershire, which was first launched in 1998. It is currently developing a second site for up to 1,000 holiday homes – Silverlake in Dorset – and has a number of other projects in the pipeline.

Examples of recent and current holiday lodge park developments include:

- Scampston Park Lodges, Malton, North Yorkshire (www.scampston.co.uk/park-lodges.html) – a development of 75 luxury holiday lodges for sale
- Westholme Estate (www.westholme-estate.co.uk) – Darinian Leisure Resorts' £10 million development of a former caravan holiday home park;
- The Lakes by yoo, Cotswolds (www.thelakesbyyoo.com) – a development of luxury second homes around a series of lakes
- The Cornwall, St Austell (www.thecornwall.com/stay/self-catering-woodland-homes.aspx) – 22 architect-designed 5 star woodland self-catering homes developed alongside a boutique hotel and spa
- The Sherwood Hideaway, Nottinghamshire (www.sherwoodhideaway.com)
- Flowery Dell Lodges, Richmond, North Yorkshire (www.flowerydell-lodges.com) - 15 pine lodges for rental.
- Lakes Leisure at Tarleton in West Lancashire has secured planning permission at appeal for the development of 49 holiday homes alongside the existing outdoor pursuits, water sports and caravan park.
- Yorkshire-based Luxury Lodge Group is planning to develop the £12m Forest Lakes holiday lodge park at Sutton-on-the-Forest, near Easingwold in North Yorkshire, with 46 luxury lodges, a spa, clubhouse, brasserie, delicatessen and shop.
- Windsor-based holiday company Haulfryn was granted planning permission by Wiltshire Council in August 2016 to redevelop Brokerswood Country Park, near Westbury into a luxury holiday resort with 90 wooden holiday lodges, 20 touring caravan pitches and 10 camping pods.
- London-based property developer, Eider Homes, is currently progressing plans to redevelop the site of the former Upland Park Hotel in Droxford, with 36 woodland holiday lodges, a central leisure facilities building and a day spa. The company is currently seeking pre-application advice from the South Downs National Park Authority.

A development that stands out from anything previously seen in the UK is the newly opened **Soho Farmhouse** luxury holiday village on the Great Tew Estate in Oxfordshire. Developed by Soho House & Co at a cost of £50m, the site offers 40 rustic cabins of various sizes, a 7-bedroom farmhouse and a 4-bedroom cottage, spread across the 100-acre estate. The village has five eating venues, a fleet of 19 retro milk floats delivering food and drink across the estate, and a wide range of leisure activities, including a swimming pool complex, tennis, horse riding, cycling, boating, crazy golf, five-a-side football and ice skating in winter. What makes the development unique is the village community feel that has been created.

Another major holiday home development that is currently under development is Habitat First Group's **Silverlake** sustainable vacation community on the 560-acre Warmwell Quarry site at Crossways in Dorset. Planning permission was granted in November 2014 for up to 1,000 environmentally sustainable holiday homes, cottages and lodges, a country club, leisure facilities and a hotel. The first phase of holiday homes is currently being marketed for sale.

Fishing lodges and lodge parks are a particular type of holiday lodge accommodation that has developed across the UK. These are clusters of timber lodges for sale or rental that are developed around fishing lakes for sale or rental. They can range in size from 2-3 lodges up to more extensive developments of 40-50 lodges. They vary in standard but are frequently high quality, luxury 4 and 5 star lodges. Examples include:

- Eye Kettleby Lakes, near Melton Mowbray in Leicestershire (www.eyekettlebylakes.com)- 12 luxury log cabins around a complex of eight fishing lakes
- Heron Lakes, East Yorkshire (www.heron-lakes.co.uk) – 50 lodges
- Thornham Lake, Thetford, Norfolk (www.thornhamlake.co.uk)
- Celtic Lakes Resort, Lampeter, Wales (www.celticlakesresort.com) – sixteen 5 star lodges developed around 6 fishing lakes
- Rural Roosts, near Market Rasen in Lincolnshire (www.ruralroosts.co.uk) - 8 luxury pine lodges around two fishing lakes.

Similarly, **golf lodges**, built on golf courses, for sale, timeshare purchase or rental, have been another emerging sector trend. Similar to fishing lodge developments they can range from a small number of lodges up to major golf lodge complexes. Golf lodges generally offer a high standard of accommodation. They are often developed alongside golf hotels. Examples include:

- Rutland Lodges, Greetham Valley Golf Course, Rutland (www.greethamvalley.co.uk/self-catering/rutland-lodges)
- South Winchester Lodges, South Winchester Golf Course, Hampshire (www.southwinchesterlodges.co.uk)
- Overstone Park, Northamptonshire (www.overstonepark.com/lodges) - 114 golf lodges alongside a clubhouse, leisure club and 31-bedroom hotel
- Lakeside Lodge, Huntingdon, Cambridgeshire (www.lakeside-lodge.co.uk) – seven 2-storey timber lodges alongside a 64-bedroom hotel, health club and conference and banqueting suite

- Q Lodges (www.qhotels.co.uk/luxury-lodges) – luxury golf lodges for sale or rent have been developed as part of Q Hotels' Belton Woods, Slaley Hall and Cameron House golf resorts in Lincolnshire, Northumberland and Scotland.
- KP Lodges at The KP at Pocklington in East Yorkshire (www.kpclub.co.uk/accommodation/lodges)

Eco lodges and eco lodge parks are a more recent product development. These are individual timber lodges or complexes of lodges that are built to the highest possible environmental sustainability standards and designed and operated to minimise their carbon footprint. Eco lodges will typically include features such as the use of sustainable materials in their construction, grass or sedum roofs, renewable energy sources, waste recycling, energy conservation measures and water conservation systems. Their green credentials are a key part of their marketing and many customers are increasingly choosing these types of accommodation because they want to go an eco-friendly holiday and reduce their carbon footprint. Eco lodge operators will usually also encourage their guests to take part in green activities in terms of car-free days out, walking and cycling, nature study, foraging, bird and wildlife watching, and buying local produce. Examples include:

- Natural Retreats' Yorkshire Dales eco lodge park development near Richmond (www.naturalretreats.com/uk/destinations/england/yorkshire-dales)
- Brompton Lakes, Yorkshire (www.bromptonlakes.co.uk/log-cabins-yorkshire.asp)
- Mill Meadow Eco Homes, Somerset (www.millmeadow.co.uk)
- Rosehill Lodges, Cornwall (www.rosehilllodges.com)
- Wheatland Farm Eco Lodges, Devon (www.wheatlandfarm.co.uk)
- Ludlow Ecolog Cabins, Shropshire (www.ludlowecologcabins.co.uk)
- Eagle Brae in Invernesshire (www.eaglebrae.co.uk)
- The Emerald, Carnon Downs, near Truro, Cornwall (www.emeraldcornwall.co.uk)

Holiday Villages and Resorts

The fifth UK Center Parcs holiday village opened at Woburn Forest in Bedfordshire in June 2014. It has 625 holiday villas, a 75-bedroom hotel, an indoor sub-tropical swimming complex, a choice of on-site restaurants, a spa and a wide range of indoor and outdoor leisure and sports facilities. Developed at a cost of £250 million it has been one of the largest ever leisure projects in the UK. Center Parcs was granted planning permission in February 2016 for its first holiday village in Ireland. The €233m holiday village will include 470 lodges, 30 apartments and over 100 indoor and outdoor activities.

A new luxury 5-star holiday resort is currently being developed in Carbis Bay at St Ives in Cornwall. Una St Ives opened in August 2014 with a first phase of 29 holiday lodges for sale. Each lodge has been constructed with wood from sustainable sources and includes sheep's wool insulation, triple glazing, sedum roofs and solar panels. The site has planning permission for a further 94 lodges. The resort also has an on- site restaurant, a delicatessen selling organic Cornish food and drink products, a spa and an infinity swimming pool and leisure complex.

Plans for major holiday villages and resorts have been unveiled for a number of other locations in the UK:

- The Lightwater Valley theme park near Ripon in North Yorkshire secured planning permission in 2013 for the development of a log cabin resort with 106 holiday units.
- Planning permission was granted in 2013 for the development of the Penrhos Leisure Village on the site of the former Anglesey Aluminium works near Holyhead. The scheme includes the development of 815 holiday lodges and cottages on two separate sites, together with a 75-bedroom hotel, an indoor sub-tropical swimming complex, spa, water sports centre and restaurants.
- Cornwall Council has granted planning consent for the redevelopment of the abandoned Spirit of the West theme park at St Columb into a luxury holiday resort with 325 rental holiday homes and an indoor leisure village with swimming pool, gym, restaurants and cafes. The plans, which also include a self-catering training academy, are being progressed by the owners of the Retallack Resort & Spa near Padstow.
- Planning consent has been granted to redevelop the 84.5 acre former Cookswood Quarry in the Mendip Hills in Somerset into a holiday village with 143 holiday chalets, a swimming pool and spa complex, restaurant, recreational lake, sports facilities and play areas. The site is currently being marketed for sale.

- Forestry Commission Scotland and Highlands & Islands Enterprise are planning to develop a £25million holiday resort next to Ben Nevis that will comprise a 5 star hotel and spa, a bunkhouse, up to 50 holiday lodges and a campsite.
- Plans were unveiled in January 2015 for the development of a £450m all-weather holiday resort at the site of Loudon Castle in Galston, East Ayrshire. The project includes 450 luxury lodges, 12 glamping units and a large indoor leisure complex with a sub-tropical pool and various sports facilities.
- In Derbyshire, plans have been unveiled for the £400m Peak Resort year-round holiday resort to be developed on a reclaimed opencast mining site in Chesterfield on the edge of the Peak District National Park. The plans include 600 holiday apartments, a hotel, hostel units, 250 woodland lodges alongside an 18-hole golf course, golf academy, sports centre, spa, conference centre, indoor adventure sports park, covered lawn games arena and bike tracks.
- In the South Downs National Park plans were unveiled in July 2015 for a £104million eco resort on the 118-acre site of the disused Shoreham Cement Works, to the north of Shoreham-on-Sea in West Sussex. The proposals include 600 eco-friendly holiday pods, an eco-hotel and conference centre, and a range of leisure attractions including natural swimming ponds, a watersports lake, rock climbing, high ropes course, mountain biking trails, an outdoor amphitheatre and Indoor auditorium for live performances and music festivals, and a range of cafes and restaurants. Plans have subsequently been unveiled in April 2016 for the development of an eco-village on the site, with 2,200 homes, office space, restaurants, shops, a visitor centre for the National Park and a range of community facilities.

Treehouses

An interesting although very niche self-catering accommodation product that has emerged in the UK in recent years is self-catering **treehouses**. A number of these have been developed across the UK, primarily as individual units. They are generally very high quality. They clearly have appeal to the family market. Center Parcs has opened a small number of luxury two-storey treehouses at its holiday villages in Sherwood Forest and Longleat Forest. Aimed primarily at the family market the treehouses include 4 en-suite bedrooms; an open plan kitchen, dining and living area; a games den (accessed along a timber walkway) with plasma TV, pool table, games console, Blu Ray player and a bar area with fridge; and a private hot tub. (www.centerparcs.co.uk/accommodation/By_Type/treehouse.jsp). Forest Holidays (the Forestry Commission) has introduced luxury Golden Oak Treehouse Cabins at its forest cabin holiday sites in Cornwall, Forest of Dean, Blackwood Forest in Hampshire, Sherwood Forest, Thorpe Forest in Norfolk and North Yorkshire (www.forestholidays.co.uk/cabins/cabins/treehouse.aspx). Other examples in the UK include:

- The Treehouse at Lavender Hill Holidays, Somerset (www.lavenderhillholidays.co.uk/properties.asp?id=101)
- Gwdy Hw, Powys, Wales (www.canopyandstars.co.uk/britain/wales/powys/living-room/gwdy-hw)
- In June 2015 the Aspinall Foundation opened the Treehouse Hotel at its Port Lympne Reserve wild animal park in Kent. It offers 10 two-bedroom lodges sited at the top of an escarpment overlooking a tree canopy, rather than actually in the trees (www.aspinallfoundation.org/short-breaks/treehouse-hotel).
- The Yurt Retreat at Crewkerne in Somerset added The Bird House treehouse to its accommodation offer in 2015 (www.theyurtretreat.co.uk/treehouse)

Holiday Parks

The market for caravan holiday home parks remained relatively robust during the economic downturn, with relatively few holiday parks going into administration compared to other elements of the visitor accommodation sector such as hotels. However, the Credit Crunch did affect the sales of holiday parks, as despite market interest prospective buyers had difficulty in securing finance. The improved market conditions over the last three years and positive outlook going forward, together with the return of key lenders and interest in the sector from new investors has seen a significant upturn in holiday park sales and investment in 2015 and so far in 2016. All of the major holiday park operators have acquired additional holiday parks and invested heavily in them and their existing sites. Many smaller holiday park operators have expanded and invested. Many independent holiday park operators have also invested in their sites but with more limited access to commercial funding, investment in the independent holiday park sector has generally been at a slower pace. Some of the key improvements and investments that have been made include:

- The replacement of caravan holiday homes (both for ownership and hire) with new, larger, higher quality caravan holiday homes that include such features as double glazing, central heating, en-suite bathrooms, large lounge areas and outdoor decking areas and verandahs.
- New and up-graded leisure facilities including indoor pools, entertainment centres, indoor and outdoor sports, children's play areas, club houses, bars and restaurants.
- Layout improvements with cul-de-sacs replacing long rows, and larger plots with direct access, landscaping and private patios, resulting in lower density parks. This can however create commercial challenges for holiday park operators as it reduces total capacity. Many holiday parks are looking to expand their footprint to compensate for this.
- The introduction of luxury lodges for sale and/or rental, which are of a very high specification, with contemporary design and the latest technology.
- Environmental improvements, with better screening, the development of wildlife areas, recycling schemes and the use of solar power. Over 600 holiday parks now have the David Bellamy Conservation Award for nature and environmental conservation management.
- The conversion of touring caravan and camping pitches to caravan holiday home plots, as this is usually much more profitable for holiday parks.
- The introduction of glamping units e.g. safari tents, canvas cottages, bell tents, vintage caravans, and camping pods.

Investment activity by leading holiday park operators has been as follows:

- Bourne Leisure spent £55m on its portfolio of 36 Haven holiday parks during winter 2015/16. This included enhanced pools and entertainment complexes, new food and drink outlets, landscaping and infrastructure works, and new accommodation units. Bourne Leisure acquired two holiday parks in East Yorkshire from Flamborough Holidays in April 2015. It reopened one of them as the Haven Thornwick Bay Holiday Park in March 2016, following a £10m investment, which included a refurbished swimming pool complex, new restaurant, an activity barn and new play park.
- Park Holidays acquired holiday parks in Suffolk and Kent in 2014 and 2015. It has invested heavily in 2015/16 in the refurbishment of clubhouses, new swimming pools, and new and upgraded accommodation units, including luxury lodges. It has also reopened the Landscove Holiday Park at Brixham in Devon, following a complete refurbishment.
- Park Resorts has acquired seven holiday parks in the Lake District, North West and Lincolnshire. It invested £20m in 2015 in new bars and restaurants at four parks, new entertainment complexes at two sites, improved layouts at a number of parks, and the introduction of glamping cottages at its two holiday parks on the Isle of Wight.
- Parkdean Holidays has introduced 11 new, extra-wide, top-of-the-range caravan holiday home models across its 23 UK holiday parks, and new lodge units at two parks.
- Park Resorts and Parkdean Holidays merged in 2015 to become the UK's largest holiday park operator with 73 holiday parks.
- 5 star holiday park operator Park Leisure has opened what it is calling the UK's first boutique holiday park – Oyster Bay in North Cornwall. It offers luxury caravan and lodge holiday homes, together with an on-site spa and leisure suite and a range of personal services including a fleet of chauffeur driven Mercedes Benz cars to take guests to local beaches and attractions. The group acquired its 12th holiday park in 2015 in North Wales.
- Pontins was acquired by Britannia Hotels in 2011. The company has since embarked on a multi-million-pound refurbishment programme to raise the standard of accommodation at the group's 6 holiday parks.
- Bridge Leisure Management completed a management buyout of Bridge Leisure Parks in 2015, with the support of Phoenix Equity Partners, acquiring a holiday park in Scotland at the same time. It acquired another holiday park in 2015, bringing its total portfolio to 9 caravan holiday home and holiday lodge parks across the UK.
- Best of British Holiday Parks has converted 11 of its 50 holiday parks to 'adult-only' parks.

- Family-run Hoburne Holiday Parks has completed its largest ever investment programme ahead of the 2016 season. A total of £6million has been spent across all seven of its holidays parks, which are located across South West England. Improvements have included new-look entertainment and leisure complexes at three parks, brand new accommodation units at three parks, and free Wi-Fi across all parks.
- Away Resorts acquired the Cosways Holiday Park in Essex in April 2015, bringing its total portfolio of holiday parks up to five. The company is backed by private equity investor LDC. As part of its long term plan to invest in the development of all of its holiday parks, it is currently implementing a 3-year, £12m improvement plan at its Tattershall Lakes Holiday Park in Lincolnshire, which includes new caravan holiday home pitches, a major expansion of the park's bar and restaurant, and the introduction of various leisure facilities including adventure golf, an indoor activity marquee, a toddlers play area, and an outdoor wet play area. Away Resorts is also investing in its Whitecliff Bay Holiday Park on the Isle of Wight, with the introduction of additional caravan holiday home pitches and glamping units, including canvas cottages, bell tents and 1970s caravans.
- Weymouth holiday park operator Waterside Holiday Group, has introduced a number of new, larger luxury caravan and lodge models at its three 5 star holiday parks. This has included the development of a complex of luxury cedar-clad lodges at its park at Osmington. The group also has planning permission for a village of safari tents at its Waterside Holiday Park.
- Bunn Leisure completed a £17m beach nourishment and breakwater development coastal protection scheme in 2014 to help protect its 4 holiday parks on the Selsey Peninsula and support further investment in their improvement.

Whilst some holiday parks have expanded in response to the growth in demand for holiday home ownership and rental over the last 20 years, many are constrained by land availability, the ability to secure planning permission and flood risk, although there are examples of more positive approaches being adopted provided that adequate flood mitigation and evacuation measures can be introduced.

National holiday park operators will develop new holiday parks if they can find suitable sites that might be acceptable in planning terms. The difficulty of obtaining planning permission for a new holiday park has generally constrained the development of new sites however. The majority of local authorities across the country have planning policies that resist the development of new holiday parks because of their visual impact on the landscape. Flood risk issues are also a major barrier to new holiday park development. These constraints on the development of new holiday parks have however been a key factor in the robustness of the sector as it has meant that market demand has generally exceeded supply in most parts of the country.

Touring Caravan and Camping Sites

The focus of product development in the UK touring caravan and camping sector has been primarily on the **upgrading** and development of existing sites and the **extension of opening periods**, rather than on new site development. Where new sites have been developed they have generally been relatively small sites. Planning constraints impose a significant barrier on the development of large new touring caravan and camping sites in many parts of the UK, particularly for schemes that involve new buildings and/or winter caravan storage. Achieving commercially viable large touring caravan and camping site development projects is also very difficult. The **Caravan Club** and **Camping and Caravanning Club** are the main operators that have opened large new sites. They are motivated more by providing additional choice for their members than entirely commercial considerations. The Camping and Caravanning Club is continually looking for opportunities for new club sites. Sites associated with visitor attractions and leisure and sports facilities are of particular interest, for example the Club's site at the Gulliver's Kingdom theme park in Milton Keynes. The Caravan Club has acquired established touring parks in a number of locations and upgraded and developed them into new club sites. These have included sites in West Sussex, Cheshire, Lincolnshire and Scotland. It also opened entirely new club sites in Barnard Castle in County Durham in 2010, Bridlington in East Yorkshire in 2011, Strathclyde Country Park near Glasgow in 2012 and Stonehaven in Aberdeenshire in 2013. The development of Caravan Club sites is carried out using local suppliers and contractors where possible, and with an emphasis on landscaping using native species to promote biodiversity. The Club has developed an expertise in land reclamation, with a number of new sites having been developed on brownfield sites such as worked-out quarries, former railway stations and ex-service camps.

Both the Caravan Club and the Camping and Caravanning Club are investing substantially in improving their sites. The Caravan Club invested £4.5 million during the 2015/16 winter season in the development of 10 of its sites. This included refurbishing or rebuilding six toilet blocks, adding 40 serviced pitches, converting 68 grass pitches to hard standings, and upgrading three children's play areas. The Camping and Caravanning Club invested £4.8million in 2014/15 and £4million in 2015/16 in site improvements including upgrading toilet and shower blacks, new reception buildings and site shops, resurfacing site roads, more hard standing and electric hook-up pitches, new children's play areas, and site security measures.

Many independent touring caravan and camping parks are also investing in improving and developing their sites and facilities. The sorts of investments that are being made include the following:

- The installation of electric hook-up points;
- The development of hard standing pitches, which allow winter use by tourers and motor homes;
- The development of fully serviced pitches with water and drainage connection;
- Investment in site infrastructure e.g. drainage, roads, lighting, signage, entrances;
- Improvements to landscaping and site layouts;
- Better quality, heated toilet and shower blocks;
- New laundry facilities;
- Leisure facilities e.g. games rooms, saunas, gyms, internet rooms;
- The development of children's play areas and improvements to existing play areas;
- Catering operations;
- On-site shops;
- Installation of Wi-Fi;
- Improved access and facilities for disabled guests;
- The introduction of camping pods and glamping units.

The **'greening' of touring caravan and camping parks** in terms of promoting biodiversity, reducing environmental impact and encouraging guests to engage in environmentally sustainable activities has also been a key trend in the sector that looks set to continue. Examples include investing in environmentally sustainable technologies for electricity generation, water heating and waste recycling; promoting bio-diversity through creating wildlife areas and planting to encourage butterflies and bees; and providing nature and orienteering trails, cycle hire and wildlife watching activities.

The Caravan Club is firmly committed to boosting its green credentials with a number of policy initiatives across its sites network, including using biodegradable and environmentally-friendly products, building with timber from sustainable sources, shredding tree prunings on site to use as mulch, and using low-energy lighting. The Club has made a major commitment to eco-friendly caravanning through a £1.8 million investment in its Poolsbrook Country Park Club site near Chesterfield in Derbyshire, including trialling a whole range of energy and water efficient technologies such as solar panels and photovoltaic cells, wind turbines, rain water harvesting and grey water recycling, geothermal energy and heat recovery ventilation systems, for possible roll out to other sites. The Club also has 43 sites that have signed up to its Boosting Biodiversity programme.

The other key development trend in the sector has been the **lengthening of the season** with many site operators now wanting to operate over a longer period and increasing numbers of sites looking to stay open throughout the year. The higher specifications of today's touring caravans and motor homes is resulting in growing numbers of owners wanting to use their caravans and motor homes throughout the year. Sites are increasingly investing in hard standing pitches to enable them to cater for this demand. Planning restrictions have not necessarily kept pace with this market demand, underpinned by concerns about permanent residential use and visual impact in the winter.

The recession, together with innovations in easy-to-erect tents and camping equipment, have stimulated strong growth in demand for **camping** in the UK.

Eco Camping

Another emerging trend is the development of eco camping sites. These are small, low impact, environmentally friendly, off-grid camp sites with solar or wind powered showers and eco/ compost toilets. They often have a central campfire area and/or allow campers to have their own campfires. Some sites offer secluded and isolated pitches for individual camping. Sites may have wildlife areas and some offer nature study and environmental activities and courses. Examples are Cerenety Camp Site in Cornwall (www.cerenetycampsite.co.uk); Northlodge in Pembrokeshire (www.eco-camping.co.uk); The Secret Campsite in East Sussex (www.thesecretcampsite.co.uk); and Comrie Croft in Perthshire (www.comriecroft.com/sleep/eco-camping.html). In some cases, eco camping sites also offer glamping units or glamping sites have opened eco camping sites. Eco Camp UK (www.ecocampuk.co.uk), for example, offers fully equipped bell tents alongside forest tent pitches at its Beech Estate ecological woodland camp site in East Sussex.

Camping Pods

Camping pods were first introduced in the UK at the Eskdale Camping & Caravanning Club site in the Lake District in 2008. The site has 10 camping pods priced at £43.75 per night. They are made from locally sourced timber and insulated with sheep's wool. They have hard foam floors, French windows, wooden decking areas, heaters and electric lighting. Each pod sleeps 4 people. They have proved extremely popular and have even attracted demand during the winter. The Camping and Caravanning Club has now introduced camping pods and dens at its club sites in Bellingham, Northumberland; Hayfield in the Peak District; Eskdale and Ravenglas in Cumbria; Skye; Gulliver's Kingdom at Milton Keynes; and Thetford Forest www.campingandcaravanningclub.co.uk/ukcampsites/club-glamping/camping-pods. Newfoundland Leisure Lodges, the company that manufactured the pods for these sites reports huge interest in the concept, which is rapidly developing throughout the UK. The company has now supplied camping pods to over 70 sites across the country. The YHA has introduced camping pods alongside its hostels at Malham and Grinton in the Yorkshire Dales, Hawkshead and Borrowdale in the Lake District, Stratford-upon-Avon, Manorbier in Pembrokeshire, and its South Downs hostel at Lewes in East Sussex (www.yha.org.uk/places-to-stay/alternative-accommodation/camping-pods). The National Trust is another organisation that has started to offer camping pods at three sites in the Lake District, Clumber Park in Nottinghamshire and a site in Northern Ireland www.nationaltrust.org.uk/holidays/camping/camping-pods . Holiday parks, holiday lodge parks, touring caravan and camping sites and hotels are increasingly introducing camping pods as an alternative accommodation option. Examples are:

- The Pure Leisure Group has introduced camping pods at three of its holiday parks (http://www.pureleisuregroup.com/holidays/camping-pods).
- The Hillcrest Park touring caravan park at Caldwell in County Durham (www.hillcrestpark.co.uk/pods)introduced 3 camping pods in August 2011, increasing this to 5 pods in March 2012 and 10 in October 2012 due to the strength of demand.
- The Old Thorns Manor Hotel and Golf Club at Liphook has developed a number of luxury eco pods adjacent to the hotel as an alternative accommodation option (www.oldthorns.com/home/accommodation-old-thorns-hotel-hampshire/luxury-eco-pods).
- Woodland Park Lodges at Ellesmere in Shropshire (www.woodlandparklodges.co.uk/camping-huts.html) has 5 camping huts alongside 11 holiday lodges.

- Sumners Ponds caravan and camping sites, near Horsham in West Sussex introduced 5 camping pods in 2010 (www.sumnersponds.co.uk).
- Higher Moore Farm Campsite at Nottington, near Weymouth introduced 6 boutique micro pod lodges in 2015 (www.highermoorfarm.co.uk/pod-boutique-luxury-camping)

Glamping

A key trend in recent years has been the rapid growth of glamping (glamorous camping) offers, in terms of ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation such as geodesic domes, gypsy caravans, retro caravans, safari tents, glamping pods and tree camping. These types of accommodation have proved to be highly popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment. As a new form of accommodation they have attracted significant media coverage and wherever they have opened such accommodation operations have quickly attracted strong demand. Go Glamping (www.goglamping.net), the leading online directory of luxury camping sites, now lists 342 locations in the UK.

Key luxury camping products that have so far emerged in the UK are as follows:

- **Feather Down Farms** (www.featherdown.co.uk) is a concept that has been operated in the UK since 2005 by the Feather Down Farm Days company as a seasonal luxury camping holiday option. Originally developed in Holland, the concept involves Feather Down Farm Days providing working farms with 5-10 fully equipped Feather Down tents for erection between Easter and October. The tents provide spacious, ready-to-use camping accommodation including beds, bedding, a toilet, wood-burning cooking stove, cool chest and cooking equipment. The farmer is responsible for providing a cold water supply to each tent and connection to a mains sewer or septic tank, together with the provision of a communal hot shower facility. Feather Down Farm Days runs a national marketing, advertising and PR campaign and provides a central booking system. The company currently has 29 sites across the UK. Their development strategy has focused initially on locations that are within a 2-hour drive time of London, as this is their core market. These holidays require some affluence, at circa £1000 for the week, and they recognise that they are aiming at the educated city dweller wanting rural family 'experience' for themselves and their children.

- In November 2014 Feather Downs Farms launched a sister brand, **Country Retreats** (www.featherdown.co.uk/country-retreats)in order to offer the Feather Down Farm model to a wider range of country estates. Under the new scheme, land, country estate and vineyard owners choose new, fully collapsible log cabins and/or luxury canvas lodges and become part of The Country Retreats Collection that Feather Down Farms is marketing. Owners are encouraged to personalise the interiors of the cabins/lodges and to offer a range of interesting activities for guests. Five Country Retreats sites have opened so far, in Essex, Shropshire, Cornwall, Lancashire and Scotland. The aim is to eventually expand to 50 sites across the UK.

- **Lantern and Larks** (www.lanternandlarks.co.uk) is a new glamping operator, established in 2013 as a subsidiary company of The Holiday Property Bond. It operates in a similar way to Feather Down Farms, working with land owners to develop complexes of up to 8 luxury, fully furnished and equipped glamping tents. It has 4 sites so far in Lancashire, Rutland, Somerset and Suffolk, and is looking for further opportunities in the South East, including in Sussex.

- **Ready-pitched luxury camps:** Jolly Days Luxury Camping (www.jollydaysluxurycamping.co.uk) in North Yorkshire is a boutique campsite that offers the ultimate in luxury camping, with 8 large lodge tents with four poster beds, sofas and chandeliers, 7 vintage style tents and 7 bell tents. Shieling Holidays (www.shielingholidays.co.uk) on the Isle of Mull provides 16 fully equipped Shieling cottage tents, which take their name from the summer cottages that Highland shepherds traditionally use. The tents are equipped with proper beds and fully equipped kitchens and have electricity and gas heaters. Some also have shower and toilet facilities. Dandelion Hideaway (www.thedandelionhideaway.co.uk) in Leicestershire offers a number of canvas cottages.

- **Yurts**, based on the Mongolian yurt, are wooden frame, insulated circular tents that are usually furnished with beds, wood burning stoves and kitchen equipment. The Bivouac (www.thebivouac.co.uk) on the Swinton Estate in the Yorkshire Dales has 8 yurts and six timber frame shacks. Each yurt sleeps 5 and comes with beds, bed linen, a terracotta cold store, wood burning stove and gas burner for outdoor cooking on a wooden veranda. Lincoln Yurts at Welton in Lincolnshire (www.lincolnyurts.com) offers 5 themed yurts that are fully equipped with beds, bedding, a gas stove, BBQ and decked seating area and supported by a bathroom cabin with a Jacuzzi bath. Other examples area Hidden Valley Yurts in Monmouthshire (www.hiddenvalleyyurts.co.uk) and Yurtshire (www.yurtshire.co.uk) which has two yurt camps in North Yorkshire and one in Warwickshire.

- **Tipi** sites offer a similar set up. Examples include Wild Northumbrian Tipis & Yurts (www.wildnorthumbrian.co.uk); Lincolnshire Lanes Camp Site in the Lincolnshire Wolds (www.lincolnshire-lanes.com); Eco Retreats in Powys, Wales (www.ecoretreats.co.uk); and 4 Winds Lakeland Tipis (www.4windslakelandtipis.co.uk) in the Lake District.

- Wooden **wigwams** rented out at around 20 sites in Scotland and the North East of England are another alternative. Northumbria's Pot-a-Doodle-Do (www.northumbrianwigwams.com) has 12 wooden wigwams sleeping 4/5 people. Each wigwam is fully insulated and has electric lighting and heating. Foam mattresses are provided. The site has a central shower and toilet block, kitchen for guests' use and licensed restaurant on site.

  Wigwam Holidays is a national wigwam holiday franchise that now offers 70 sites across the UK. The company manufactures the wigwams and sells them to franchisees who then pay a franchise fee to cover the use of the Wigwam Holidays brand, marketing through the Wigwam Holidays website and online booking system, and ongoing IT, marketing and operational support.

  Springhill Farm in Northumberland (www.springhill-farm.co.uk/wigwams) offers a number of wooden wigwams alongside self-catering cottages and a touring caravan and camping site.

- Other examples of luxury camping offers include:

  - **Geodesic domes** e.g. The Dome Garden (www.domegarden.co.uk) at Coleford in Gloucestershire has 10 geodesic ecodomes equipped with wood burning stoves, beds, private flushing toilets, a fully-equipped outside kitchen area with fridge and timber en-suite hot shower. Another example is Ekopod (www.ekopod.co.uk) in Cornwall.
  - **Persian alachigh tents**, similar to yurts e.g. Penhein Glamping near Chepstow in Monmouthshire (www.penhein.co.uk)
  - **Gypsy caravans** e.g. Gypsy Caravan Breaks in Somerset (www.gypsycaravanbreaks.co.uk) and Roulotte Retreat in the Scottish Borders (www.roulotteretreat.com), which has 4 French roulette gypsy caravans for hire.
  - **Retro caravans** e.g. Vintage Vacations on the Isle of Wight (www.vintagevacations.co.uk), which has a collection of 13 vintage American Airstream and Spartan caravans for hire; Happy Days Retro in East Dorset (www.happydaysrv.co.uk) with 4 airstream caravans available for hire for holidays; and Mad Dogs and Vintage Vans in Herefordshire (www.maddogsandvintagevans.co.uk), which has 4 vintage caravans.
  - **Shepherds Huts** e.g. Herdy Huts in the Lake District (www.herdyhuts.co.uk) and Shepherds Huts South East (www.shepherdshuts-southeast.com) in Kent.
  - **Safari Tents** e.g. Port Lympne Wild Animal Park in Kent (www.aspinallfoundation.org/short-breaks) has developed two safari tent encampments - Livingstone Lodge and Elephant Lodge overlooking the elephant paddocks, and the Camping and Caravanning Club has 4 safari tents for hire at its club site at Gulliver's Kingdom theme park at Milton Keynes and one at its club site at Teversal in Nottinghamshire. (www.campingandcaravanningclub.co.uk/ukcampsites/club-glamping/safari-tents/). Another example is A Little Bit of Rough at Uppingham in Rutland (www.alittlebitofrough.co.uk)
  - **Medieval Glamping** e.g. Warwick Castle has 41 ready-to-bed medieval-themed tents and guests are served breakfast at medieval-styled tables in a banqueting tent. They are also offered medieval-themed evening entertainment, including archery, a jester's school and knight's school and medieval games (www.warwick-castle.com/accommodation/mediaeval-glamping-at-warwick-castle.aspx). Leeds Castle in Kent offers 8 striped canvas pavilions based on a medieval design as its Knight's Glamping site (www.leeds-castle.com/Accommodation/Knight%92s+Glamping)

- **Tree camping** in tents and structures suspended in trees e.g. Red Kite Tree Tent in Mid Wales (www.sheepskinlife.com/relax-at/red-kite-tree-tent), The Tree Tent at The Secret Campsite in East Sussex (www.thesecretcampsite.co.uk/secret-shelters), and Treehotel in Sweden (www.treehotel.se), which features 5 quirky, individually designed 'treerooms' and a tree sauna.
- **Bubble camping** in transparent inflatable tents was introduced in France in 2010 but has yet to come to the UK (www.bubblecabins.com)
- **VW camper van pop-up camps** e.g. Volkswagen Commercial Vehicles partnered with booking website LateRooms in 2014 to provide 6 VW California camper vans for hire on a nightly basis at Temple Island in Henley-on-Thames
- **Cargo pods**, converted from shipping containers have been introduced at the Lee Wick Farm glamping and touring site at St Osyth, near Clacton-on-Sea in Essex (www.leewickfarm.co.uk).
- **Converted train carriages** e.g. Long Hill Carriage at Cucklington in Somerset is a restored 1882 Great Western Railway carriage that provides a living space and kitchen alongside an en-suite double bedroom in an adjacent converted 1950s goods wagon (www.longhillcarriage.co.uk)
- **Converted lorries** e.g. Cedar Valley in the Meon Valley in Hampshire offers a converted horse lorry as a glamping unit sleeping 3 people, alongside safari tents, a yurt and a campsite (www.cedarvalley.co.uk/betty/about-betty)
- **Champing** (camping in a church) - the Churches Conservation Trust offers champing at four of its churches in Kent, Cambridgeshire and Northamptonshire. Guests enjoy a full breakfast delivered to the church in the morning, made using local produce. The Trust also arranges activities for champing guests, including walks, canoe trips, storytelling and meditation (www.visitchurches.org.uk/champing).

Youth Hostels

The Youth Hostels Association has been going through a programme of network renewal since 2006. This saw the disposal of 32 hostels between 2006 and 2008 and reinvestment of the proceeds in upgrading the remaining hostels in the network and some new hostel openings, including a new hotel in Eastbourne in 2009. A number of the hostels that YHA sold subsequently re-opened as independent hostels, in some cases benefiting from YHA marketing support through the YHA Enterprise scheme. A new capital strategy was launched in 2010. This has focused on further rationalisation of the YHA hostel network to generate £40million for reinvestment in hostel improvements and some new hostels. This has included the development of the new YHA South Downs hostel at Itford Farm near Lewes in 2013 and the YHA Eden Project in Cornwall in 2014, which was built by portable hotel company Snoozebox and is made entirely from shipping containers. It offers 54 contemporary en-suite bedrooms for 2 to 4 guests. YHA's latest hostel openings are the new YHA Brighton in the former Royal York Hotel, which opened in November 2014, and the new YHA Cardiff, which opened in March 2015. YHA is currently progressing plans for a new 86-bed hostel as part of The Sill landscape discovery centre project in the Northumberland National Park, due to open in summer 2017.

Children's Activity Holiday Centres

The children's activity holiday centre sector is rapidly expanding in the UK and is identified as having good potential for further expansion[1]. The sector is made up of many different operators, from those with multiple centres across several countries to smaller, family-run independents. Centres range in size from 50 to 900 beds and are operated largely by the private sector but also by local authorities and charitable organisations.

[1] The information provided on the UK children's activity holiday centre sector is taken from an article published in Strutt & Parker's Leisure Comment journal in 2009 – 'Room to Grow. Duncan Willard

The two main players in the sector are PGL and Kingswood. Both companies have been the subject of high profile acquisitions. PGL was acquired by Holidaybreak plc. in May 2007 for £100m. Kingswood was acquired by DJL Merchant Banking (a division of Credit Suisse Bank) in July 2008, also for £100m. Both companies have since nearly doubled in size and now handle around 500,000 children each year. PGL opened the former Windmill Hill Place Tennis Centre near Herstmonceux in East Sussex as a children's activity holiday centre in May 2009 following a £7m revamp. The centre now offers activity courses for school and youth groups, together with summer camps and family activity holidays during the summer. The centre can accommodate up to 450 guests in bunk –bedded accommodation and new 4-6 person en-suite lodges. Facilities include a sports hall, swimming pool, climbing tower and zip wires and a multi-sports area. Existing lakes are used for canoeing and raft building. The centre has created 130 jobs. PGL also opened a new holiday centre at Liddington, near Swindon in 2010 through the conversion of the former Liddington Hotel. It can accommodate up to 1,000 children and employs 250 staff. Kingswood is currently looking for a site for a new centre in the Oxfordshire/Berkshire/Buckinghamshire/Wiltshire area/

The other key player in the children's activity holiday centre market is JCA Adventure, which became part of TUI Travel plc. in 2007. It works with 13 UK centres and two centres in France to provide multi-activity courses of 2-4 nights, netball tournaments and summer camps for young people. The company launched its first JCA-owned activity holiday centre at Condover Hall in Shropshire in 2011.

For new centres these operators would require properties of a substantial size within their own formal grounds ideally with access to lakes, rivers and woodland. They will consider leaseholds and freeholds in rural and semi-rural locations. A residential institution use class (C2) on properties such as former boarding schools or residential colleges can be an advantage but is not essential.

Another operator in this sector is the West Sussex-based charity CCHF All About Kids, which specialises in giving disadvantaged 7-11-year-old children residential activity and respite breaks. It has been looking for a site in South East England for the development of a residential activity centre for up to 80 children.

Wellness Retreats

A nascent trend that may develop further in the UK is the development of wellness retreats. Current examples include:

- ecoYoga in Argyll (www.ecoyoga.org)runs yoga courses, retreats and holidays in self-catering accommodation. The site offers a range of bathing facilities including rainforest showers, a large hot tub, artisan sauna and two wild river hot baths.
- Slimmeria Retreat in Crowhurst in East Sussex (www.slimmeria.com), which offers detox, fitness and weight loss holidays in a Georgian country house offering boutique hotel bedrooms and a luxury health spa.
- Tofte Manor at Sharnbrook in Bedfordshire (www.toftemanor.co.uk) is a manor house wedding and events venue that offers a range of wellness retreats and inspirational workshops including massage, meditation, yoga and labyrinth walking. It has 12 luxury guest bedrooms and can also offer accommodation in yurts and tents with outdoor hot water showers for larger groups.
- Brightlife (www.brightlife.com) is a country house on the outskirts of Ramsey on the Isle of Man, which offers a range of wellness courses and retreats, from yoga and pilates to chakra healing and life coaching. It has 12 luxury guest bedrooms and opened a new spa in 2015.
- The Reynolds Retreat health, fitness and wellbeing centre at Borough Green, near Sevenoaks in Kent is in the process of adding accommodation (www.reynoldsgroup.co.uk/retreat/accommodation).

Spafinder's State of Wellness Travel Report 2016 found that wellness elements, from healthy food to fitness classes and spiritual healing, are ranked as more important for Gen X and Millennnials, with these age groups increasingly seeking more out-in-nature adventure and fitness opportunities, rather than luxury spa resorts.

APPENDIX 3

GLOSSARY OF DEFINITIONS – TOURIST ACCOMMODATION

Types of Hotel

Budget

Branded limited service hotels with clean and comfortable standardised en-suite bedrooms with TV and tea and coffee making facilities and paid for Wi-Fi but otherwise limited in-room provision or services such as guest toiletries or room service. Will locate in a wide range of locations from major cities to smaller towns, seaside resorts and airport locations. Size will vary significantly by location. Tend to be larger hotels (100-200 bedrooms) in major cities and smaller hotels (50-60 bedrooms) in provincial town locations.

Key budget hotel brands in the UK are Travelodge, Premier Inn, Ibis, Days Inn

Economy budget brands (with a more basic bedroom product) include Ibis Budget, Campanile and Metro Inns

3 Star

A full service hotel that offers a restaurant and bar also open to the public, usually function/conference/banqueting facilities, and often leisure. Branded offers would tend to be 120-150 rooms+, but independent hotels may be smaller in size. Will locate in city centres and out of town where there are significant drivers of demand such as business parks.

Brand examples include Holiday Inn, Ramada, Village Urban Resort, Jury's Inn, Park Inn

4 Star

A full service hotel but with a higher specification and larger bedrooms than 3 star hotels, usually offering bath and shower, telephone, internet connection, and a wider range of services including full room service and porterage, and 24-hour reception. A quality restaurant, bar, a range of meeting rooms and business services, and a health and fitness centre. These tend to be large hotels, over 150 rooms, and sometimes up to 250 rooms+. Major city centres are the preferred locations.

Brand examples include Marriott, Crowne Plaza, Hilton, Radisson Blu, Novotel, Doubletree by Hilton, Copthorne, Millennium, Pullman, Macdonald

Boutique

Relatively small (30-50 rooms), high quality, individual hotels that feature contemporary design and a good food offer. They are often independent hotels or part of small chains that bear the signature of their founder. However, national brands are beginning to emerge that are larger format units (100+ rooms) and compete with 3 and 4 star hotels but achieve a premium on their rate due to their style and service.

Brand examples include Malmaison, Hotel du Vin, Abode, Bespoke, Chapter, Hotel Indigo

Country House Hotels

A quality hotel, often a building of character, set in extensive grounds in a rural setting. Most are luxuriously appointed and the rooms frequently have special features often targeted at the leisure rather than the business guest. Some may have health and fitness facilities, swimming pools and spas and may be able to offer or arrange country sport activities such as clay pigeon shooting and fishing. The atmosphere of a country house hotel should be one of relaxation, comfort and style.

Golf Hotels and Resorts

Hotels attached to or developed with a golf course that can range considerably in their standard and the facilities on offer. Usually they would be at least 3 star in standard, and can be developed to 4 star and luxury standards, especially if in association with a championship course. As with country house hotels and other destination hotel offers that are more remotely located, most would usually offer, restaurants, bars, function/banqueting rooms, full leisure centres, often spas, and may also have other specialist facilities such as golf academies. Some also have shared ownership lodges in their grounds.

Brand Examples include De Vere Hotels, MacDonald Resorts, Marriott Hotels & Country Clubs.

Luxury Family Hotels

Luxury country house hotels that focus primarily on catering for the family breaks market. Luxury Family Hotels is the only national hotel company trading in this market. A number of luxury country house hotels also actively target the family market.

Adult Only Hotels

Country house hotels that cater exclusively for adults on short breaks. Warner Leisure Hotels is the only national company offering this type of hotel. Their hotels offer a wide range of sports and leisure facilities and activities as well as evening entertainment programmes.

Spa Hotels

Hotels with extensive spa and wellness facilities that focus on the spa break market.

Other Types of Accommodation

Inn

Bed and breakfast accommodation within a traditional inn or pub.

Boutique Inn

Inns that feature contemporary interior design, furnishings and fittings in guest bedrooms and public areas.

Restaurant with Rooms

Guest bedrooms provided above or alongside a restaurant operation. The restaurant is normally the most significant element of the business and is usually open to non-residents as well as staying guests. Breakfast is normally provided.

Guest House

A guest house normally has at least 4 letting bedrooms with en-suite or private bathroom facilities. It is usually run as a commercial business and will have been granted planning permission as such. Breakfast is usually provided and evening meals may also be offered.

B&B

Accommodation offering bed and breakfast, usually in a private house. B&Bs normally accommodate no more than 6 guests and may or may not serve an evening meal. Will not usually require planning permission unless the primary use of a property.

Boutique B&B

Luxury bed and breakfast accommodation that features contemporary, chic interior design, furnishings and fittings.

Farmhouse B&B

Bed and breakfast accommodation provided on a working farm.

Homestay

Where householders let out rooms in their home to tourists or language school and exchange programme students. This type of accommodation has been significantly boosted by the airbnb website and other similar websites such as Wimdu and One Fine Stay.

Holiday Cottage

Cottages, houses and converted barns that are let out for self-catering holidays and short breaks and other short stay purposes. They can be residential properties that are let by owners or through holiday cottage letting agencies or purpose-designed barn conversions that have been given planning permission for holiday use.

Boutique Self Catering

Luxury self-catering accommodation that features contemporary interior design

Super Cottages

Large self-catering properties that can accommodate parties of up to 20-30 guests. These can be large residential properties, e.g. manor houses that are let out as self-catering accommodation or large purpose-designed self-catering barn conversions. Such properties have developed to cater for the growing demand for family and friendship get togethers, celebrations and house parties. They generally trade at the top end of the market, offering high quality, luxury accommodation. They will include large living spaces and dining areas and usually feature the latest in home entertainment systems. Some also have leisure facilities in terms of swimming pools, games rooms and snooker rooms.

Access Exceptional Self Catering Cottages

Self-catering accommodation that is fully adapted for use by independent and assisted wheelchair users, usually including the following features:

- Wide doorways and corridors;
- Extra space for wheelchair users;
- Wheel-in showers, possibly with hoist rails;
- Bathrooms and toilets adapted for wheelchair users;
- Low-level kitchen counters;
- Ramps, lifts or stair lifts if needed.

Holiday Lodges

Timber lodges and log cabins that are let out for self-catering holidays and short breaks or used as second homes by their owners.

Holiday Lodge Parks

Complexes of timber holiday lodges for outright or timeshare purchase and/or rental. They have developed primarily in inland locations, often woodland or waterside settings and/or associated with other developments and activities such as marinas, golf courses (golf lodges), fishing lakes (fishing lodges), watersports or alongside hotels. Most holiday lodge parks are small – the average holiday lodge park covers 32.2 acres and has 35 lodges. Timber holiday lodges are generally seen as a more up-market and exclusive alternative to the traditional caravan holiday home: they are particularly popular with older and more affluent customers. Most holiday lodges have two or three bedrooms. Holiday lodge parks increasingly have a number of on-site leisure facilities, including restaurants, bars, swimming pools, gyms and children's play areas. Holiday lodges are generally purchased as second homes for holiday purposes. Most park operators offer a holiday rental service to owners and many make participation in such a service a condition of purchasing a lodge.

Fishing Lodges

Holiday lodges around fishing lakes, usually for rental.

Golf Lodges

Holiday lodges on golf courses for outright or timeshare purchase or rental.

Eco Lodges/ Eco Lodge Parks

Individual timber lodges or complexes of lodges that are built to the highest possible environmental sustainability standards and designed and operated to minimise their carbon footprint. Eco lodges will typically include features such as the use of sustainable materials in their construction, grass or sedum roofs, renewable energy sources, waste recycling, energy conservation measures and water conservation systems. Their green credentials are a key part of their marketing and many customers are increasingly choosing these types of accommodation because they want to go an eco-friendly holiday and reduce their carbon footprint. Eco lodge operators will usually also encourage their guests to take part in green activities in terms of car-free days out, walking and cycling, nature study, foraging, bird and wildlife watching, and buying local produce.

Treehouses

Luxury wooden treehouses that are rented out for self-catering holidays and short breaks

Touring Caravan & Camping Sites

Sites that offer pitches for touring caravans, motor homes and tents. They can range in size from small, independently operated sites with minimal facilities and mainly grass pitches to extensive sites with central facilities and mostly hard standing pitches with electric hook up. National operators are the Caravan Club and Camping and Caravanning Club, which offer club sites across the country for their members, which in many cases are also open to non-members.

Certificated Sites

Small touring caravan and camping pitches that are certificated to operate by the Caravan Club and Camping & Caravanning Club, without the need for planning permission. Caravan Club certificated sites are for 5 touring caravan or motor home pitches. Camping & Caravanning Club certificated sites are usually for 5 touring caravan pitches and up to 10 tent pitches.

Eco Camping/ Wild Camping

Camping on small, basic, off-grid sites - usually grassed or forest sites with minimal facilities, often in isolated locations.

Camping Pods

Camping pods are insulated wooden tents with double glazed windows and French doors, heaters, electricity and sometimes outside decking areas. They range from standard pods sleeping two people to family, super or mega pods sleeping 4 people.

Glamping

Glamping (glamorous camping) involves camping in ready-erected, fully-equipped tents, yurts, tipis and other unusual forms of camping and caravanning accommodation such as geodesic domes, gypsy caravans, retro caravans, safari tents, glamping pods and tree camping. These types of accommodation have proved to be highly popular with more affluent families that want to experience camping holidays but without the hassle of having to bring their own tents and camping equipment.

Youth Hostels

Simple accommodation in private, shared or dormitory rooms with double, single and bunk beds. Most hostels will have a self-catering kitchen. Some also provide meals. More modern hostels may have en-suite family rooms.

Bunkhouses

Basic self-catering accommodation provided in converted barns. Bedrooms are mainly dormitory-style with bunk beds, but can also include private family rooms. Bunkhouse usually include shared toilets and showers and small kitchens.

Camping Barns

Sometimes known as 'stone tents', Camping Barns vary in facilities ranging from a basic roof over your head to the more luxurious, which include a shower and cooking facilities. Sleeping areas tend to be communal. Typically found on working farms.

APPENDIX 4

PUBLIC SECTOR FUNDING OF HOTEL DEVELOPMENT SCHEMES IN THE UK

1. Introduction

Public sector funding in one form or other is increasingly being used to support hotel development schemes across the UK in terms of:

- Local authority borrowing at preferential rates;
- Growth fund grants;
- Heritage grants for the conversion of historic buildings to hotels;
- Local authority freehold purchase of a building for hotel conversion;
- The contribution of local authority owned land or properties for hotel development;
- Local authority partnerships with universities.

Such public sector investment in hotel schemes is being justified in terms of:

- Finding a new use for a redundant building;
- Enabling a strategically important hotel that cannot secure bank finance to proceed;
- Kick starting and enabling key regeneration schemes that include a hotel as a component;
- Generating an income stream for a local authority at no cost to the tax payer;
- Helping to boost tourism growth;
- Job creation.

Examples of these types of public sector funding of hotel projects are given in the following paragraphs.

2. Local Authority Borrowing at Preferential Interest Rates

A number of local authorities across England have used their prudential borrowing powers to take our preferential rate loans to help fund hotel schemes, typically entering into a lease arrangement with a hotel operating company to generate a rental income to repay the loan and in some cases generate a surplus profit for the authority. This has enabled a number of hotel schemes that have been unable to secure commercial funding to go ahead, at no cost to Council tax payers and in some cases giving an investment return to the council. Examples are as follows:

Travelodge Partnerships with Local Authorities

Travelodge has been working in partnership with a number of local authorities to develop new hotels with funding from low interest government loans from the Treasury through the Public Works Loans Board. The hotels are built on local authority land and leased to Travelodge on a 25-year term, with the councils repaying the debt using the rental income from Travelodge and any other tenants. Travelodges have so far been developed using this mechanism in Eastleigh and Aylesbury, and are currently being progressed in Bicester, Thetford and Redhill. When complete the local authority can choose whether to retain ownership of the hotel or to sell it with Travelodge as the operator.

Pullman Hotel, Liverpool

Liverpool City Council is currently funding the £66m Exhibition Centre Liverpool and Pullman Hotel adjacent to the Liverpool Arena and Convention Centre (ACC Liverpool) on Liverpool's waterfront, through borrowing that will be supported directly from the revenue generated by the expanded ACC Liverpool campus. The scheme will thus be funded at no cost to tax payers. The hotel will have 216 bedrooms and be of an upscale 4 star standard. It will act as the headquarters hotel for conferences and exhibitions taking place at convention and exhibition centres. Exhibition Centre Liverpool is one of Mayor Anderson's priority projects. Having an on-site 4 star hotel is seen as critical to its success. After initial investigations to find a private sector partner to fund and develop the hotel failed the City Council decided to fund the hotel directly itself alongside its funding of the exhibition centre. The hotel will be wholly owned by the City Council and operated under management contract by Branded Hotel Management through a franchise agreement with Accor Hotels.

Crowne Plaza Newcastle

Newcastle City Council has borrowed £30m to help fund the development of the 250-bedroom 4 star Crowne Plaza hotel as part of the first phase of the Stephenson Quarter business district scheme in Newcastle city centre. This is a key regeneration project that the City Council sees as being of vital importance to the future development of Newcastle. The developers, Silverlink Holdings (now renamed as the Coulston Group) had secured commercial backing for other elements of the scheme but were unable to secure a loan for the hotel as the banks were reluctant to fund this type of use. With the hotel being a key element of the scheme, the City Council stepped in to borrow the money to help progress the hotel. It has lent a large slice of the money that it has borrowed to the developer to fund the construction of the hotel. The Council will use the rest of the money to buy plots of land near the hotel and kick-start work on buildings that will be sold on at commercial rates. The hotel is due to open in July 2015. It will be operated under management contract by the InterContinental Hotels Group (IHG). The hotel will add a major new business conferencing and banqueting facility to the city. Its main conferencing suite will seat and cater for around 400 people. The hotel will also offer eight adaptable meeting rooms that can accommodate small seminars of 12 people up to large private meetings of 32 and delegate meetings of 100. Combining the large conference suites and meeting rooms, the hotel can provide more space to become an ideal venue for exhibitions.

Hilton Ageas Bowl, Hampshire

Eastleigh Borough Council has recently purchased the now completed 175-bedroom, 4 star Hilton hotel at the Ageas Bowl cricket ground near Southampton, home of Hampshire County Cricket Club. In a deal signed in 2012, the Council agreed to pay £27.5m for the completed hotel to enable it to go ahead. Its construction was funded by Omni Capital. The investment has required the Council to take out a loan, which will be repaid with the revenue from the hotel. The Leader of the Borough Council, Cllr Keith House, has consistently said that the surplus income, particularly in the longer-term once the loan has been cleared, will be used to keep Council Tax down.

Lancashire County Cricket Club 4 Star Hotel

The Greater Manchester Combined Authority and Trafford Metropolitan Borough Council have stepped in to help bridge the funding gap for a proposed 150-bedroom 4 star hotel at Lancashire County Cricket Club's Emirates Old Trafford ground after the club failed to secure a bank loan for the project. A meeting of the Combined Authority in February 2015 agreed a loan of £5m towards the £12m hotel from the Greater Manchester Growth and Growing Places Funds, while Trafford Metropolitan Borough Council agreed to a loan of £4m in March. The Cricket Club turned to these public sector bodies after being turned down for funding by its bank. The Club had also rejected an offer of a loan from the Greater Manchester Pension Fund because the level of fees and proposed interest rate of 9% could not be supported by the hotel scheme. Trafford Council will borrow the £4m from the Public Works Loan Board resulting in an annual interest cost of £106,000. The Cricket Club will pay the Council £221,000 over the loan period, leading to a net profit for the Council of £115,000.

Stockport Exchange

Stockport Council is using its prudential borrowing powers to access an £18.5m preferential rate loan to forward fund the construction of a 115-bedroom hotel and 50,000 sq ft office building as the second phase of the Stockport Exchange mixed-use development scheme in Stockport town centre in conjunction with its development partner Muse Developments. The Council bought the 10.4 acre site in January 2011. The first phase of the development, which included highways improvements and a 1,000 space multi-storey car park was completed in 2014. The Council sees the scheme as being crucial to the success of Stockport town centre. It took the decision to use its preferential rates of borrowing to kick start phase 2 and attract further investment at a time when commercial funding has proved difficult to secure. The income generated will cover the cost of the loan. The Council has done extensive research and financial modelling to ensure its financing of the hotel and office development will be at no extra cost to the Council Tax payer.

3. Grants for Hotel Projects

Grants from the European Regional Development Fund (ERDF), UK Government Growing Places Fund and Regional Growth Fund, Welsh Government, Scottish enterprise agencies and individual local authorities have helped to fund a number of hotel schemes across the UK. Heritage Lottery Fund grants have also been secured to support the conversion of a number of historic buildings into hotels. Examples of grant schemes and grant assisted hotel projects are as follows

Welsh Government Tourism Investment Support Scheme (TISS)

The Welsh Government operates a discretionary capital grant scheme, which is available to both existing and new tourism businesses of all sizes (SMEs and large companies) that are looking to undertake capital investment. Support is available for the purpose of upgrading the quality of existing tourism business premises and increasing capacity where there are clear gaps in the market. The scheme has two elements offering grants of up to £75,000 and £500,000. Grants are non-repayable up to £25k, but may be repayable over £25k, subject to appraisal. The guideline intervention rate is 25% but up to 50% can be considered. A wide range of hotel projects have been supported, including a grant of £500k to support the upgrading of the Ruthin Castle Hotel to 4 stars and a £1.1m investment in the St Brides Hotel at Saundersfoot.

Highlands & Islands Enterprise

Highlands & Islands Enterprise offers a range of financial assistance to support capital investment projects, including grants, loans and direct equity investment, and works with Scottish Development International to develop investment propositions to take to market. The agency has funded a number of hotel projects including investments in 2015 of £217,500 to support a £1.4million expansion of the Isle of Eriska Hotel near Oban, and a £200,000 investment to support the expansion of the Kylesku Hotel in the Highlands.

Titanic Hotel, Liverpool

Liverpool City Council provided a £5.5m grant from the Regional Growth Fund to enable developers Harcourt to progress the conversion of the North Warehouse at Stanley Dock in north Liverpool into a 150-suite 4-star hotel at a cost of £30m. The project is part of the first phase of a £130m plan to regenerate the entire Stanley Dock site. The regeneration of north Liverpool is a key priority for the city's Mayor. The City Council decided that investment in the hotel was justified as a statement of confidence in the area, a means of finding a new use for a building that had been derelict for many years, and in terms of the new jobs that it has created. The hotel has also benefitted from BPRA. It opened in June 2014.

Premier Inn Blackburn

A 60-bedroom Premier Inn budget hotel opened in November 2015 as part of the £25 million Blackburn Cathedral Quarter development in Blackburn town centre, Lancashire. The scheme also includes an office block, restaurants, shops, a new bus interchange and housing for Cathedral staff. It has been funded by the Homes and Communities Agency (£4.75m), European Regional Development Fund (£3.6m), Blackburn with Darwen Council (£3.8m), Blackburn Cathedral (£1.7m), Lancashire LEP's Growing Places Fund (£3.9m) and commercial developer Maple Grove (£7.8m). The hotel has been let to Premier Inn.

Hampton by Hilton Humberside Airport

North Lincolnshire Council is part funding the development of a £7m, 103-bedroom Hampton by Hilton hotel at Humberside Airport through a Regional Growth Fund grant. The hotel is being developed by regional hotel operator Nightel, who will operate it under a franchise agreement with Hilton Worldwide. It is due to open in mid-2016. The Council has supported the development of the hotel on the basis of the contribution it will make to the development of the airport, the continuing expansion of the offshore oil, gas and renewable energy sectors and the new jobs that it will create.

Belfast Titanic Hotel

The derelict office building in which RMS Titanic was designed is to be developed into an 84-bedroom 4 star hotel thanks to a £4.9m grant from the Heritage Lottery Fund. The Titanic Foundation will use the grant to restore the B+ listed Harland and Wolff headquarters building on Queen's Island, Belfast, which has been vacant since 1989. The grant has been awarded through HLF's Heritage Enterprise programme. It is designed to help when the cost of repairing an historic building is so high that restoration is not commercially viable. Grants of £100k to £5million bridge the financial gap, funding the vital repairs and conservation work needed to convert derelict, vacant buildings into new, usable commercial spaces that can have a positive impact on local economies.

Buxton Crescent Hotel

The £46m redevelopment of the former St Ann's Hotel in Buxton's Grade I listed Georgian Crescent into a 79-bedroom, 5 star hotel incorporating the neighbouring natural baths into a state-of-the-art thermal natural mineral water spa, is currently being progressed with funding support from a variety of public sector sources, including the Heritage Lottery Fund (£23.8m), English Heritage (£0.5m), Derbyshire County Council (£2.7m), High Peak Borough Council (£2m) and D2N2 LEP (£2m). The developers, the Trevor Osborne Property Group, are contributing £15m. The project first commenced 10 years ago, but stalled after £5m of funding from the East Midlands Development Agency (EMDA) was withdrawn with the demise of the agency in 2011. The delay caused by losing the EMDA funding meant that because of the financial climate at the time the developers were unable to borrow the amount that they needed from the banks. Given the importance of the project to Buxton and the rest of Derbyshire the County Council stepped in with a loan to help bridge the funding gap. Further funding was also secured from the D2N2 LEP and HLF awarded an additional £11.3 m for the completion of the project in November 2014. Construction has now restarted with the hotel due to open in 2016. It is projected to generate an additional annual contribution of £4m into Buxton's visitor economy.

4. Local Authority Freehold Purchase

Aloft Liverpool

Liverpool City Council facilitated the conversion of the historic Royal Insurance building in Liverpool city centre into a 116-bedroom Aloft budget boutique hotel by purchasing the freehold of the building for £1.95 million. This unlocked £18million of private sector investment in the project, which has been progressed by Runcorn-based developer Ashall Property. The City Council was keen to bring this landmark building back into use. It had been unoccupied for 20 years and was on the National Buildings at Risk Register. English Heritage also supported the scheme with a grant of £297,500. The hotel opened in November 2014. It is operated by BDL Management under a franchise agreement with Starwood Hotels & Resorts Worldwide.