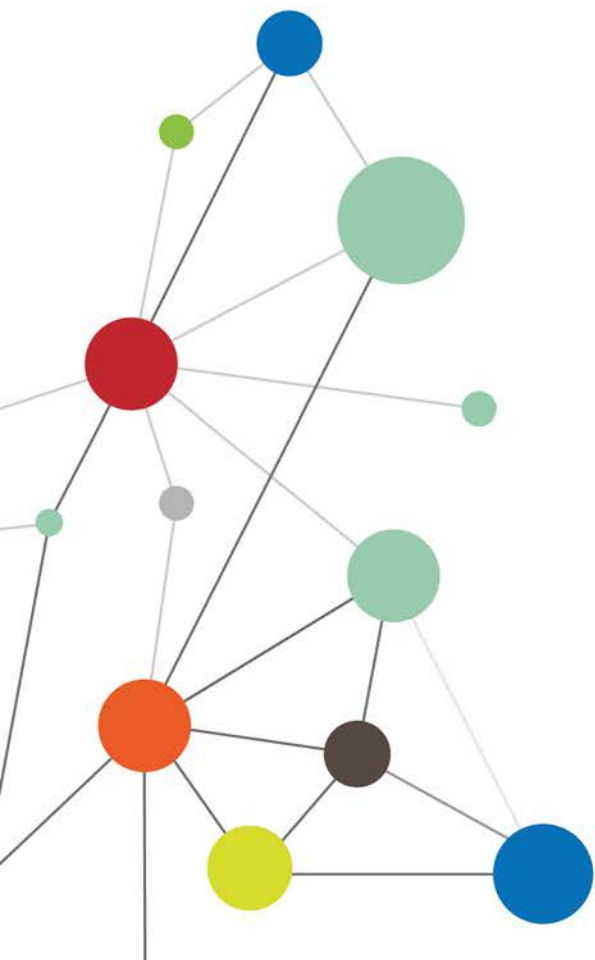


Coastal West Sussex Tourism Research Project 2016

Non-Visitor Survey Report of Findings



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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:

- 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.

Key outcomes:

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.

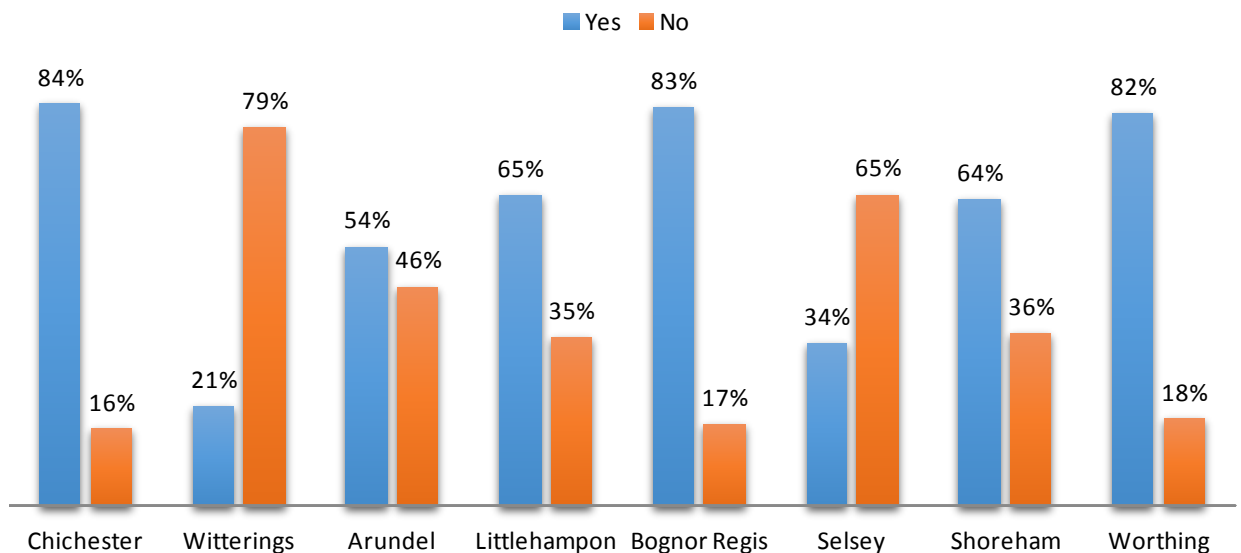
1.2.3 Between 30 May and 3 June 2016, 500 non-visitors took part in an online survey.

2 Survey results

2.1 Awareness of Coastal West Sussex

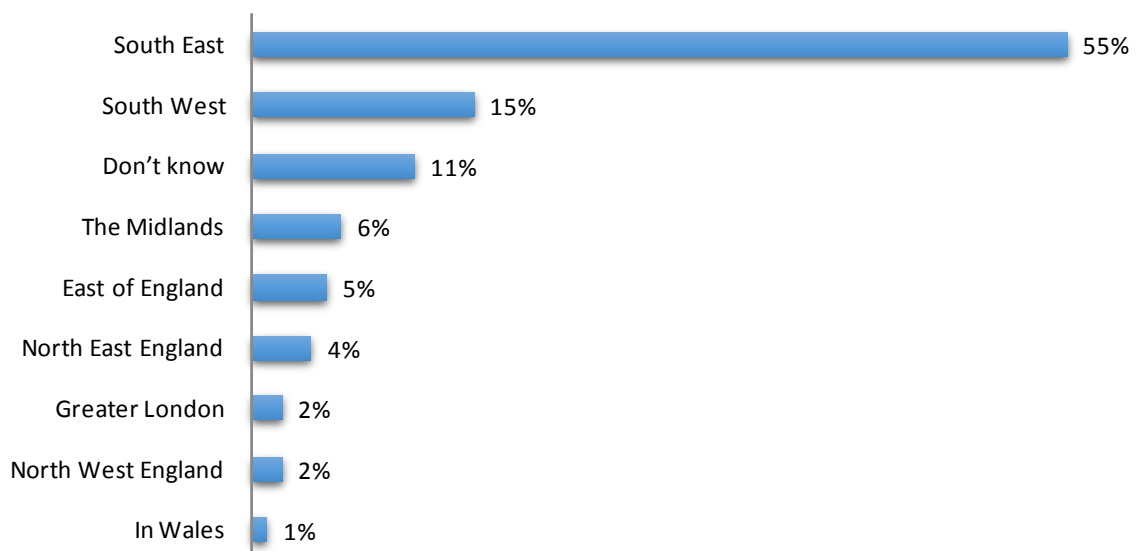
2.1.1 Awareness is strongest for Chichester, Bognor Regis and Worthing.

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

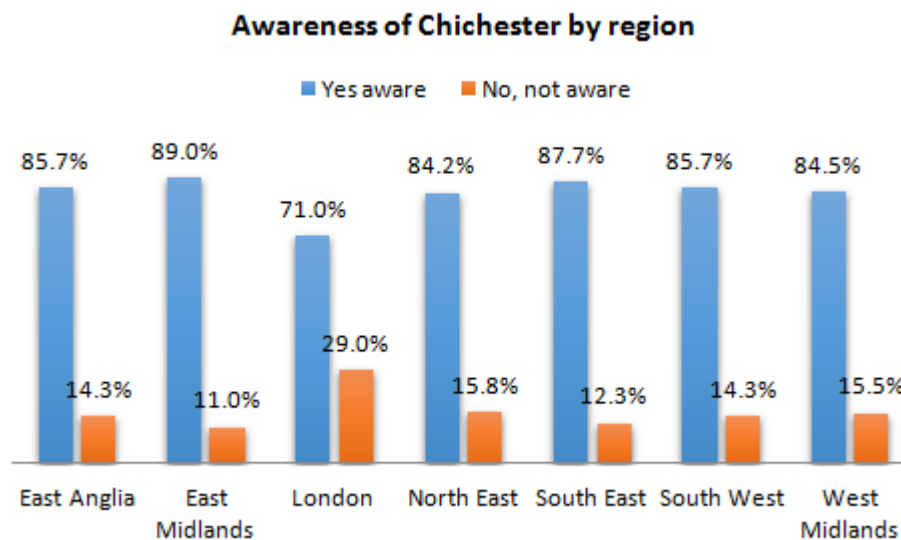


Figure 4: Awareness of The Witterings by region

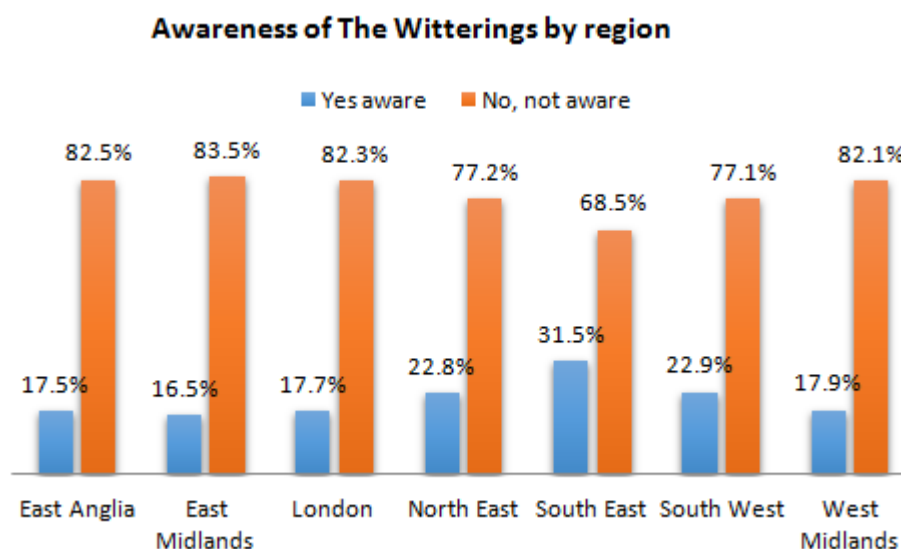


Figure 5: Awareness of Arundel by region

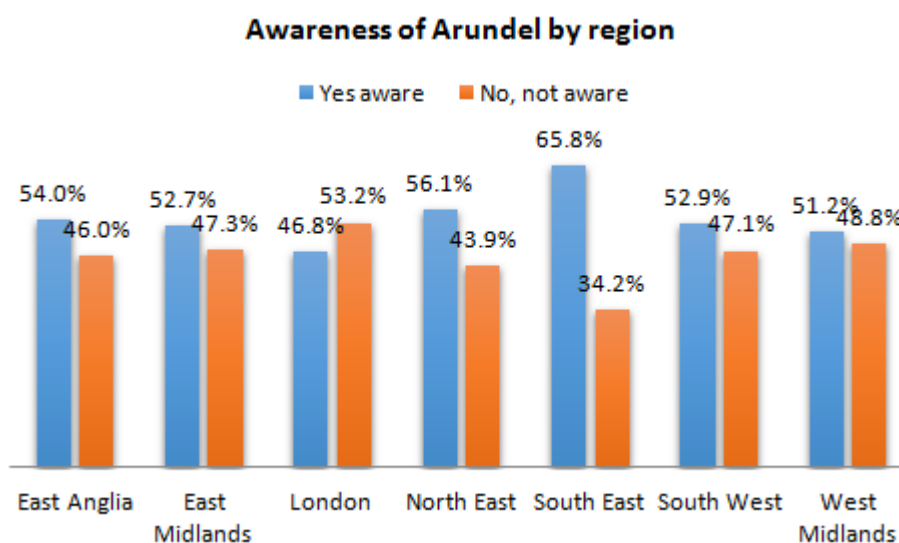


Figure 6: Awareness of Littlehampton by region

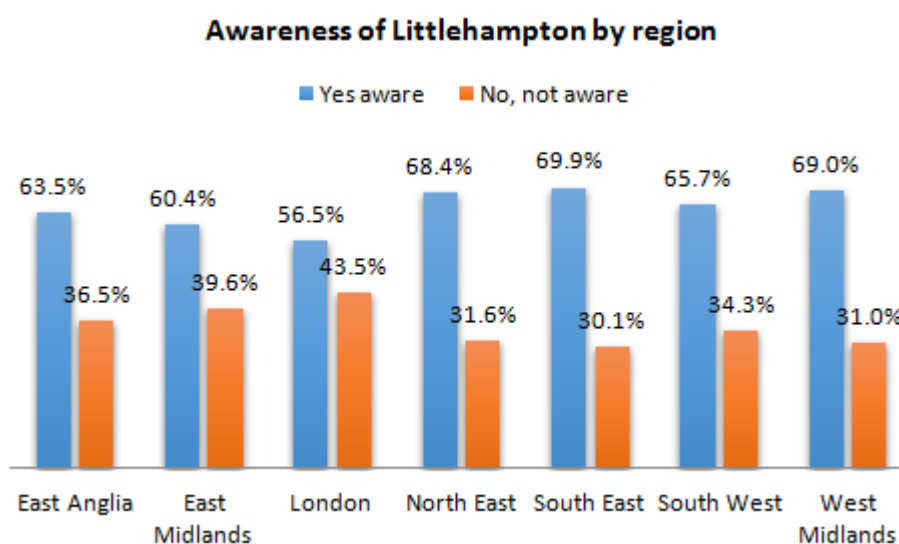


Figure 7: Awareness of Bognor Regis by region

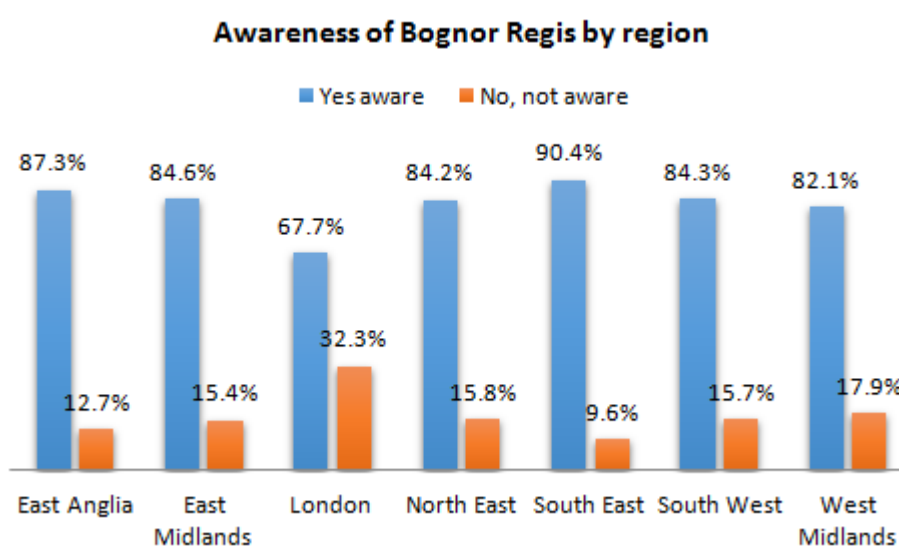


Figure 8: Awareness of Selsey by region

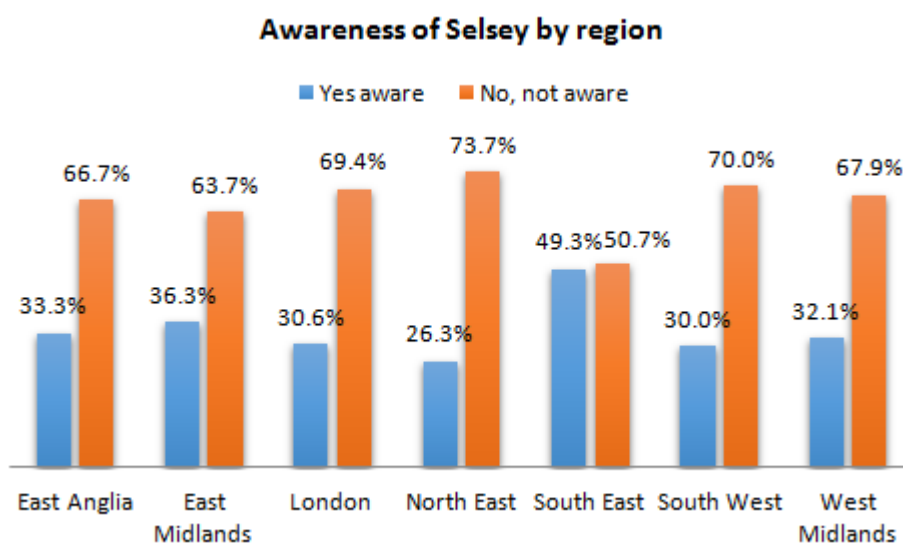


Figure 9: Awareness of Shoreham by region

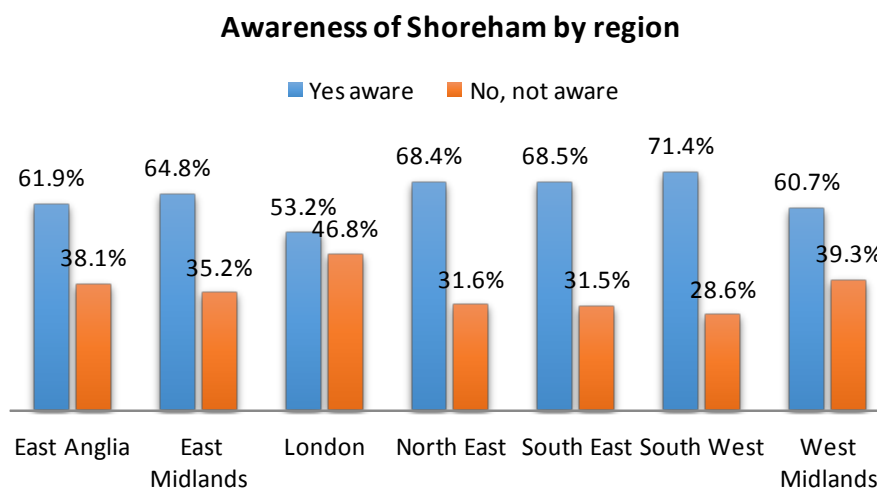
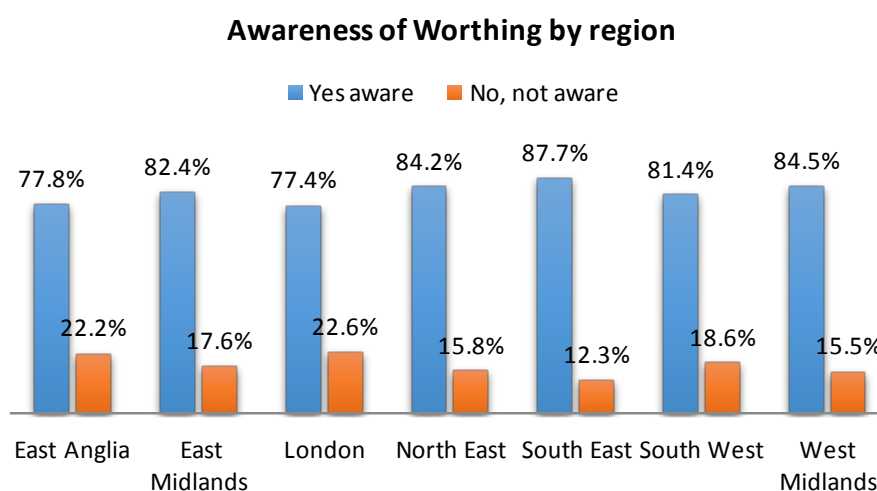


Figure 10: Awareness of Worthing by region



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

Regions CWS located	Respondent region of residence						
	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



Arundel Castle/River Arun



Chichester Clock Tower



Worthing Pier



Littlehampton Harbour



Worthing seafront



Glorious Goodwood



The Novium



Worthing artists along seafront



Worthing Watersports



Bognor Regis seafront



Chichester Canal



Shoreham-by-Sea

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%

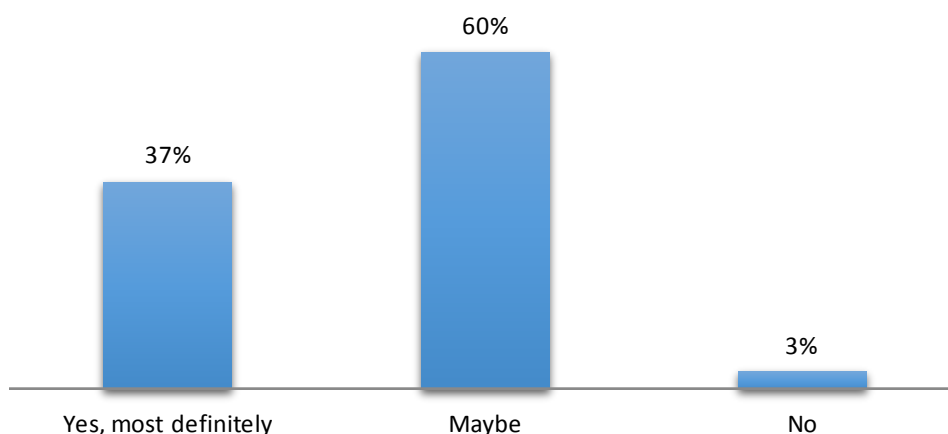
Coastal West Sussex looks like a great place for walking or cycling, enjoying stunning countryside/coastline	
Strongly disagree	0%
Disagree	3%
Agree	60%
Strongly agree	31%
Don't know/not sure	5%

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%



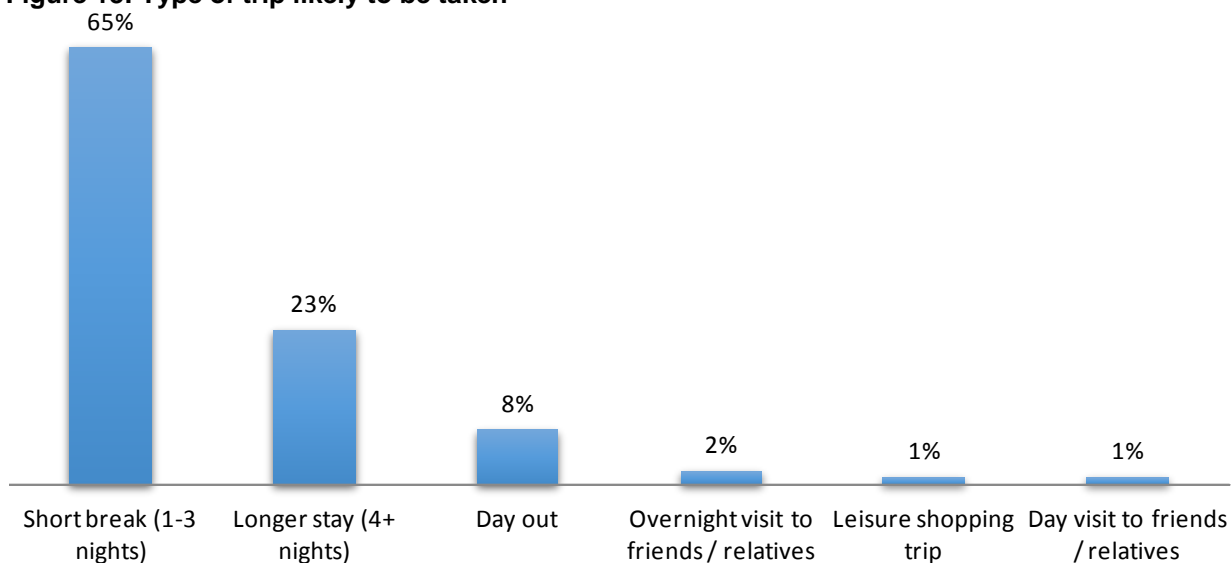
2.4.3 For the minority of non-visitors who stated that they had no interest in visiting, the vast majority replied that they simply preferred visiting other places in the UK or that they felt the destinations were too far to travel to.

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

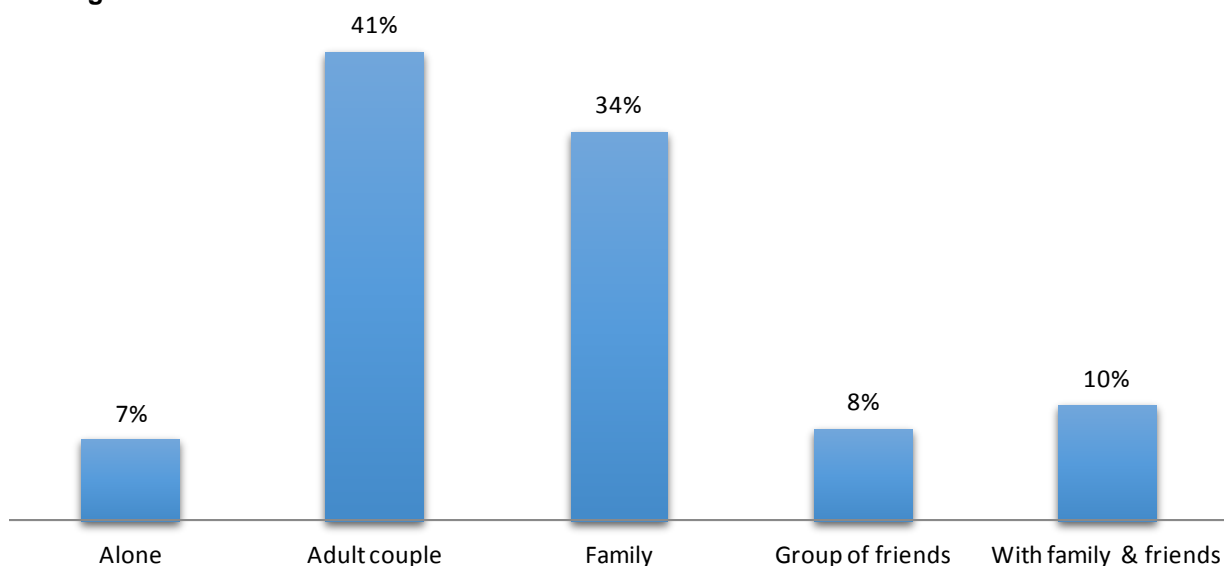
Figure 13: Type of trip likely to be taken



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%

Contact: research@tourismse.com

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