

Coastal West Sussex Tourism Research Project 2016

Industry Performance Figures



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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

| | Arun | | | | |
|--|-------------|-------------|-------------|-------------|---------------------|
| | 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

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