

TSE RESEARCH

Midhurst Visitor Survey

Report of findings

September 2016

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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 intention 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.

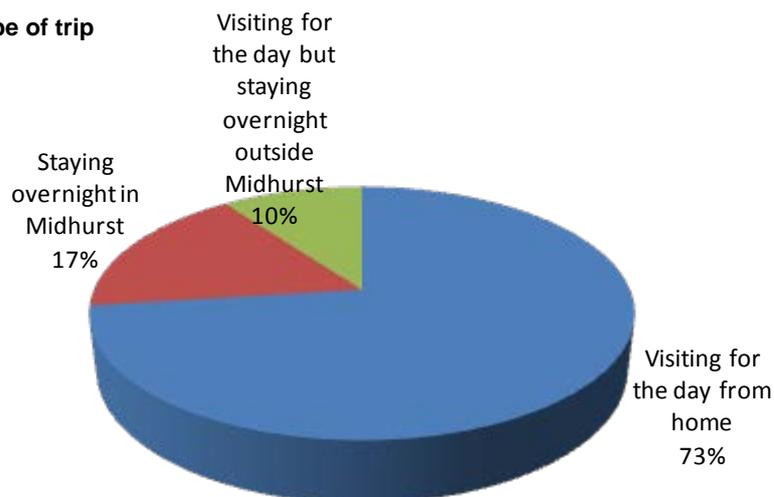
2 Visitor profile

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.

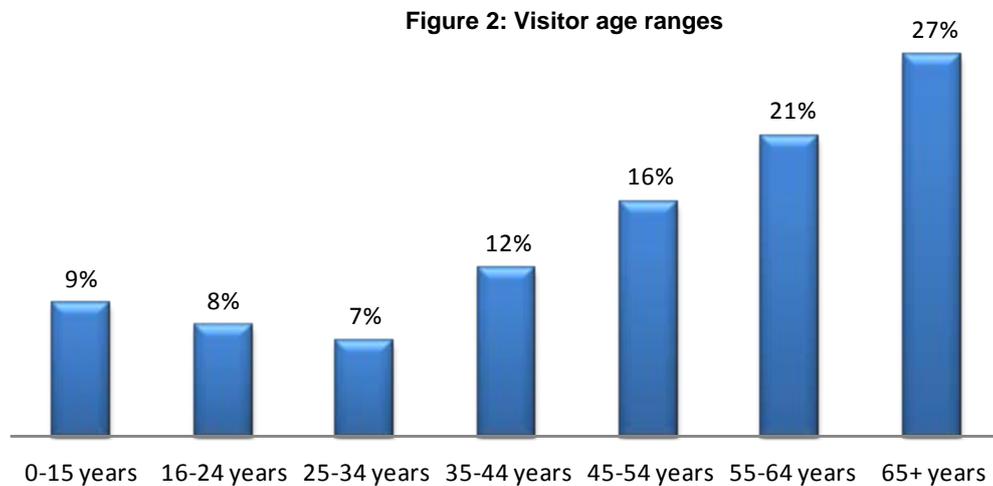
2.2.2 The majority of domestic visitors come from other parts of West and East Sussex, Hampshire and Surrey (see Appendices for full list).

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.



2.3.2 Overall, a third of Midhurst visitors are retired.

Table 3: Whether retired

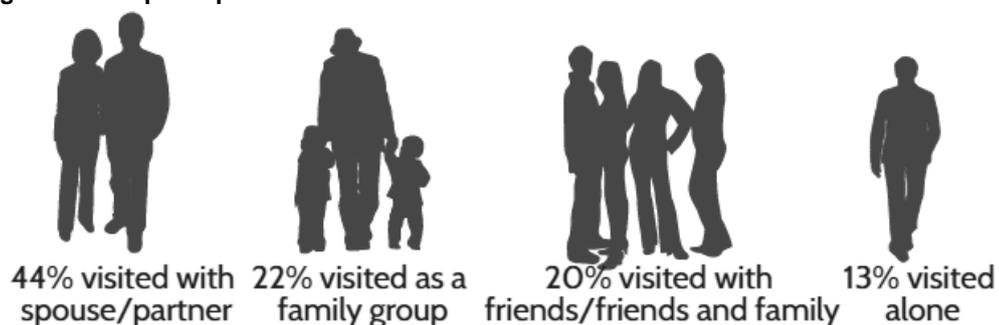
Yes	33%
No	67%

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%

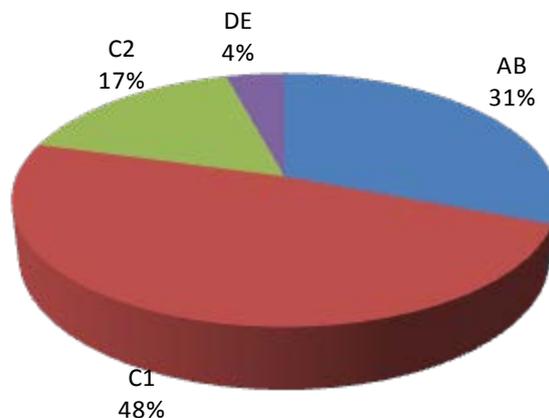
2.5 Visitor socio-economic status

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

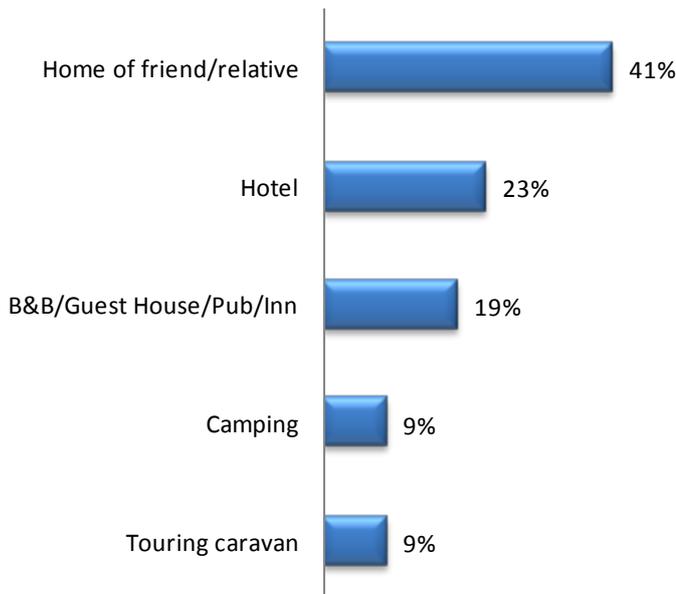
	Overall	Day visitor	Overnight visitor
Base	300	219	51
Leisure day trip	75%	87%	-
Visiting friends or relatives	9%	10%	47%
Shopping trip (special/non-regular)	8%	3%	9%
Business meeting	6%	1%	0%
Holiday/short break	1%	-	39%
Educational visit	1%	0%	4%

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.

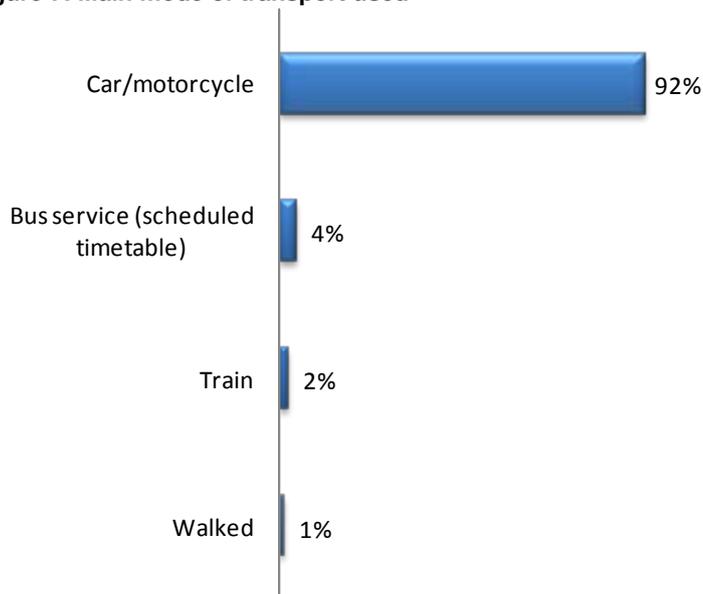
Figure 6: Average length of stay



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

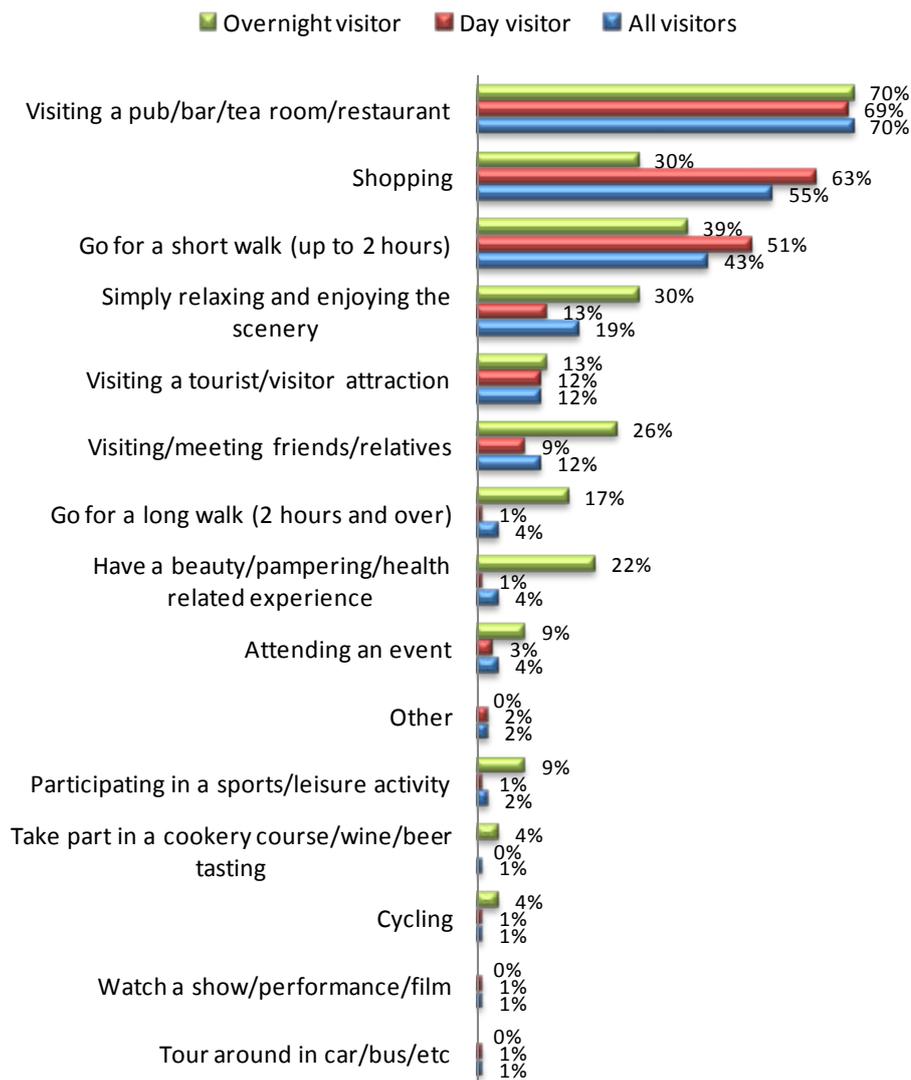


3.5 Activities undertaken / places of interest visited

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

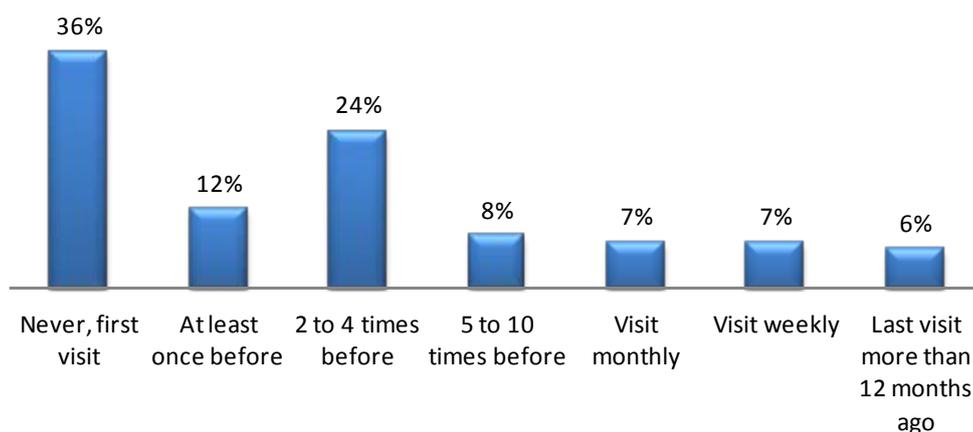


Note multiple responses permitted. Results do not sum to 100%

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) and 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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