

Petworth Visitor Survey

Report of findings

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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 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 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.

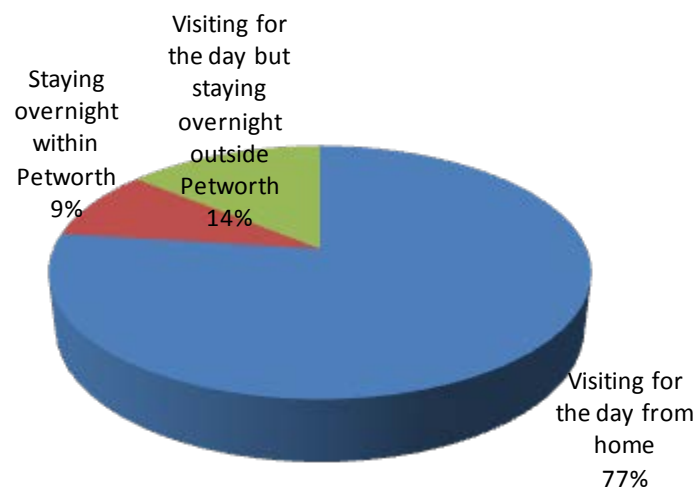
2 Visitor profile

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).

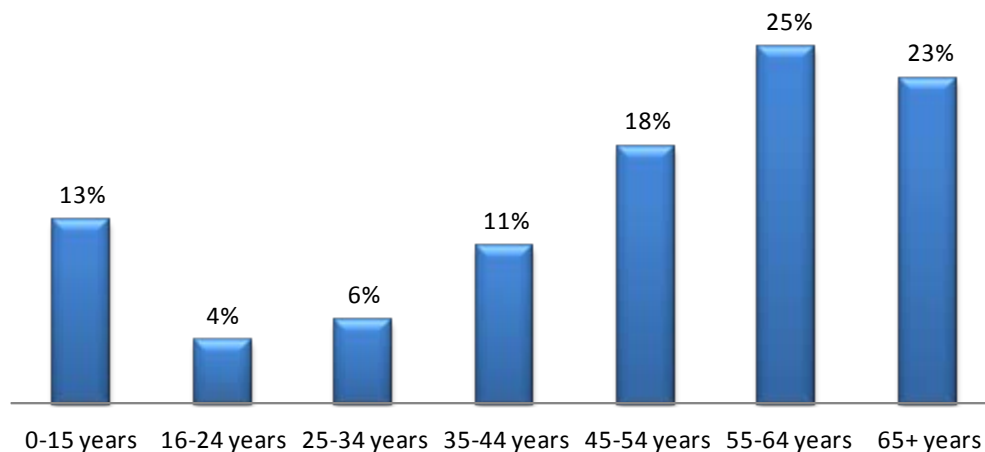
Table 2: Top 5 UK visitor county of residence

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

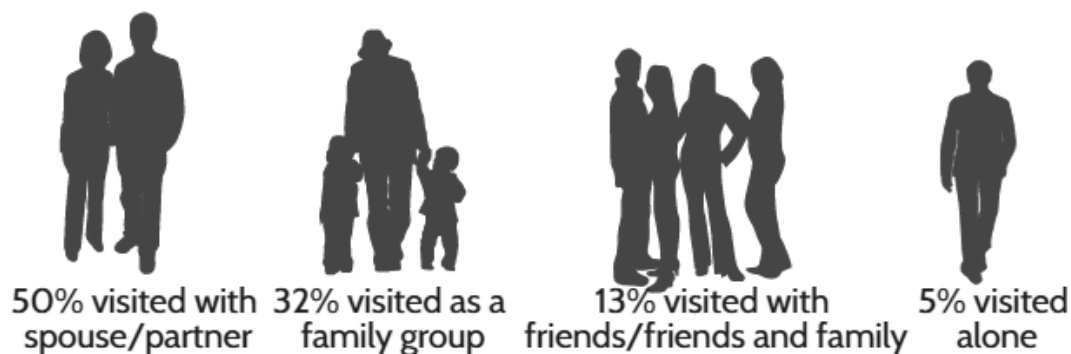
Yes	33%
No	63%

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 (23%) and groups made up of friends or friends and family (13%).

Figure 3: Group composition

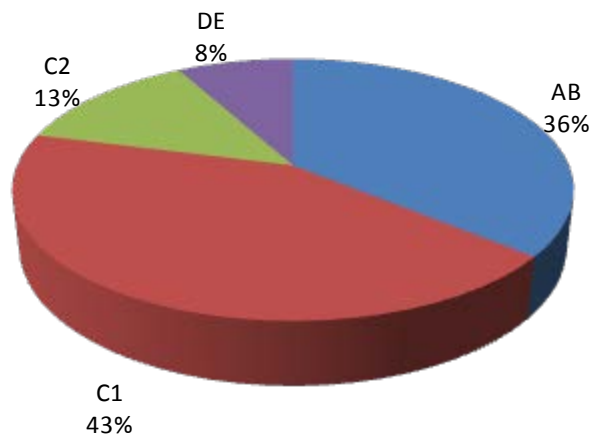


2.4.3 No significant difference in group composition was found between day and overnight visitors.

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 is 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

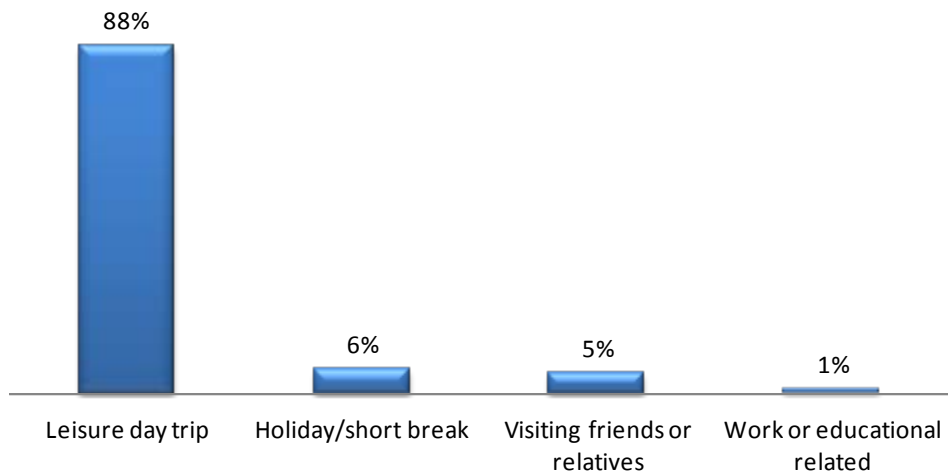


3 Trip features

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.

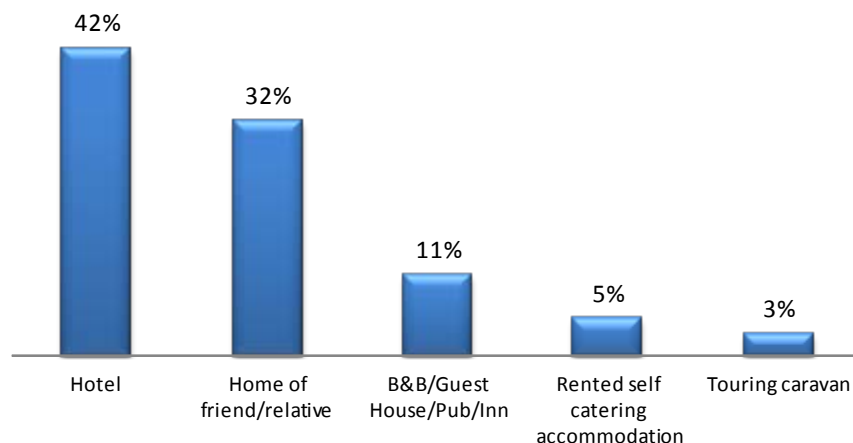
Table 4: Main reason for visiting by visitor type

	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.

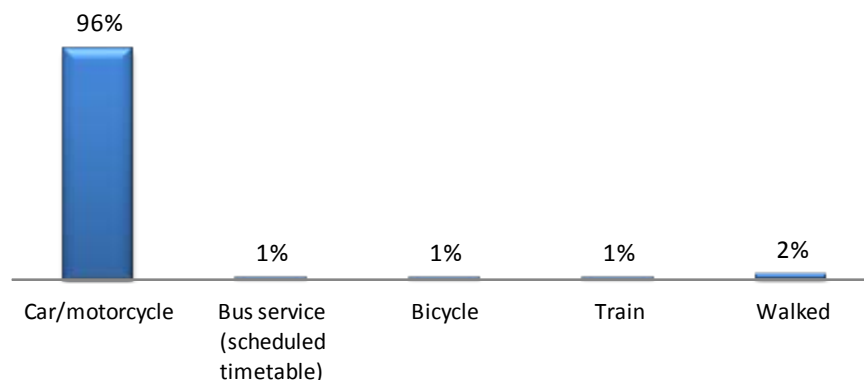
Figure 7: Average length of stay



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

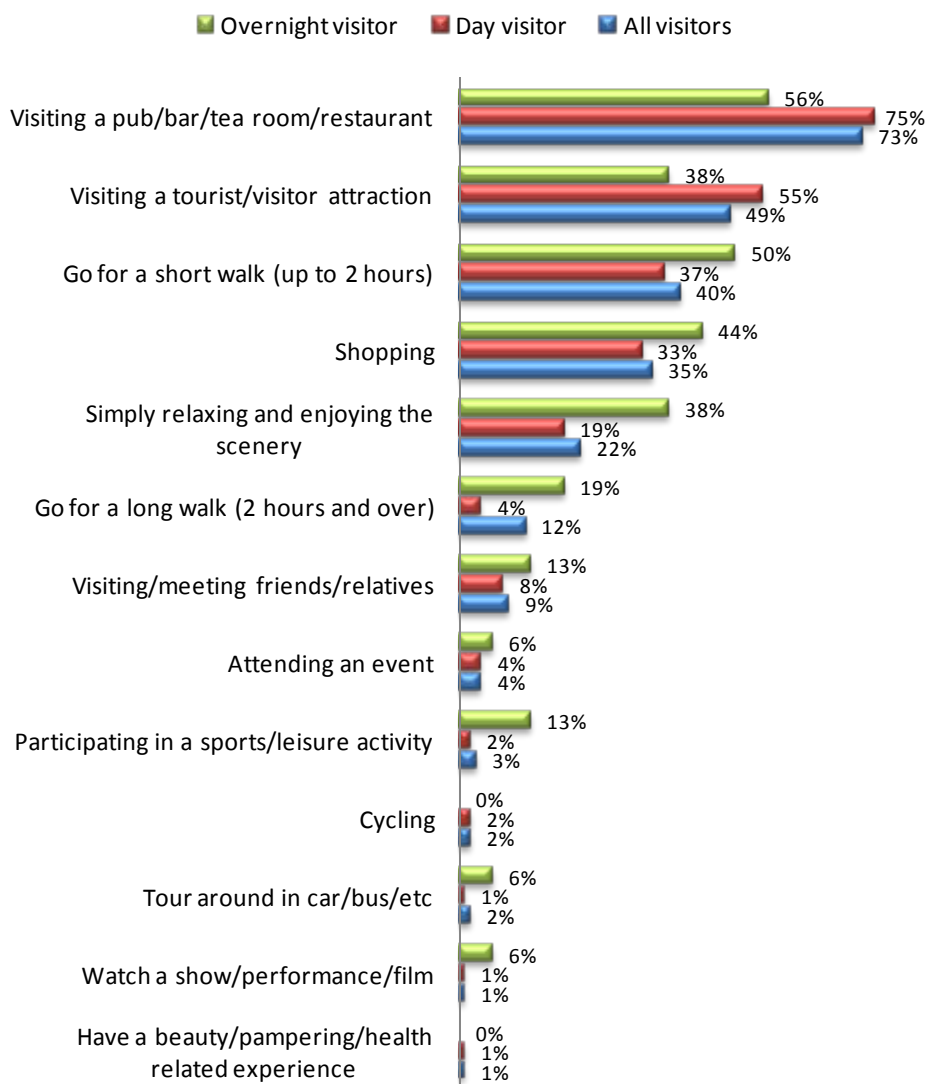


3.5 Activities undertaken / places of interest visited

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

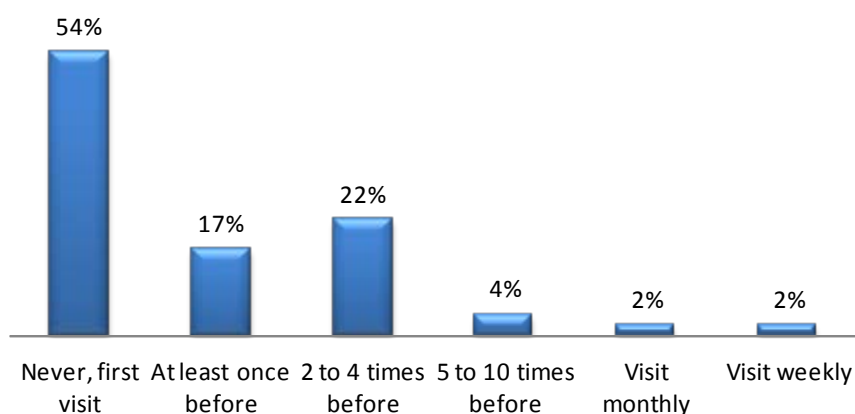


Note multiple responses permitted. Results do not sum to 100%

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 Petworth 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) 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 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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