Selsey Visitor Survey

Report of findings

September 2016

TSE RESEARCH

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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 Selsey 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 Selsey to help improve understanding of tourism within the town.

- To identify areas of strength and weakness in Selsey's tourism product.

- To identify the main reasons why visitors come to Selsey, 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, 299 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   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
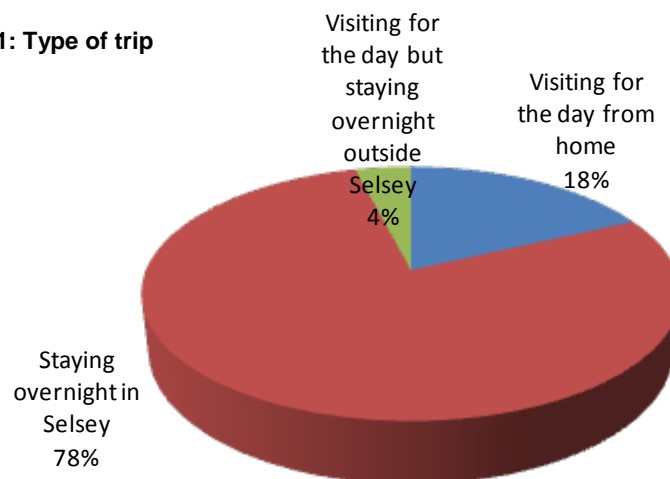
2.2   Where visitors come from

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

Age range	Percentage
0-15 years	16%
16-24 years	5%
25-34 years	7%
35-44 years	19%
45-54 years	21%
55-64 years	18%
65+ years	15%
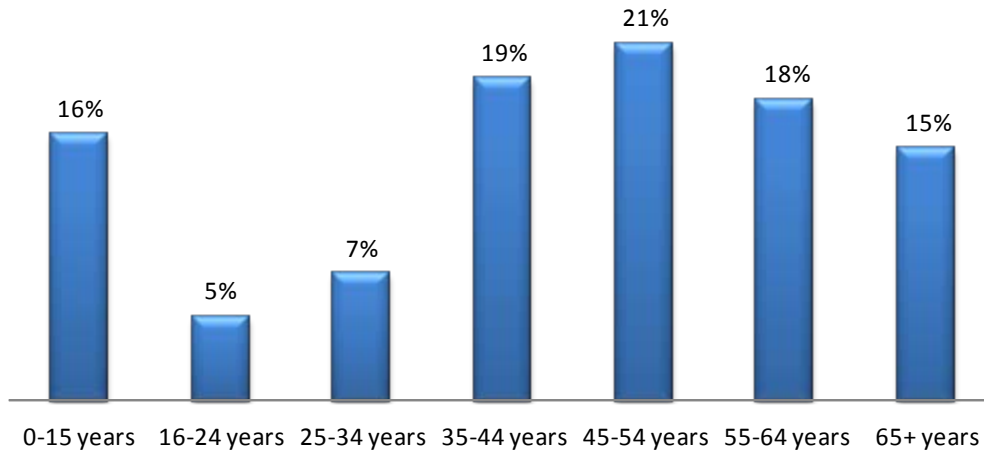
2.3.2 Overall, a third of Selsey visitors are retired.

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

51% visited as a family group   32% visited with spouse/partner   12% visited with friends or friends and family   5% visited alone
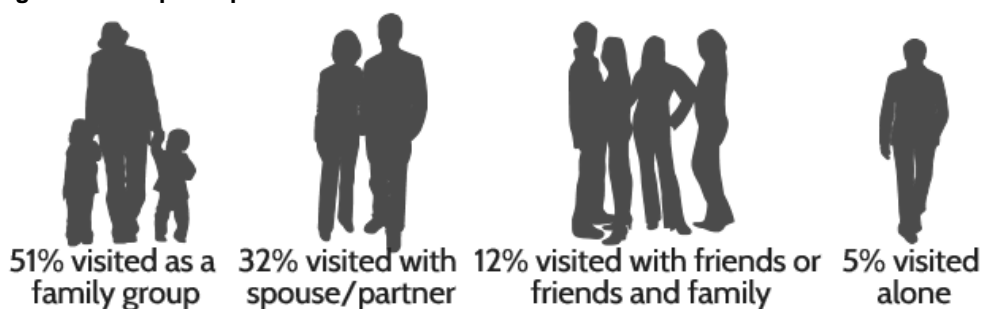
2.5 Visitor socio-economic status

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
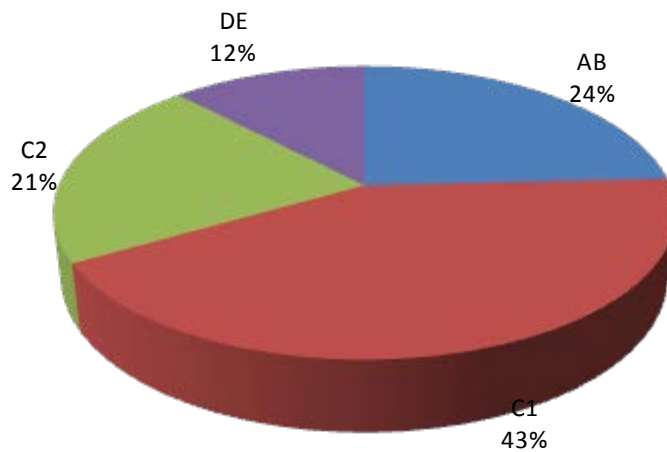
3 Trip features

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

Static caravan/chalet — 48%
Camping — 13%
Touring caravan — 12%
Home of friend/relative — 11%
Rented self catering accommodation — 10%
Second home — 6%
University accommodation — 1%
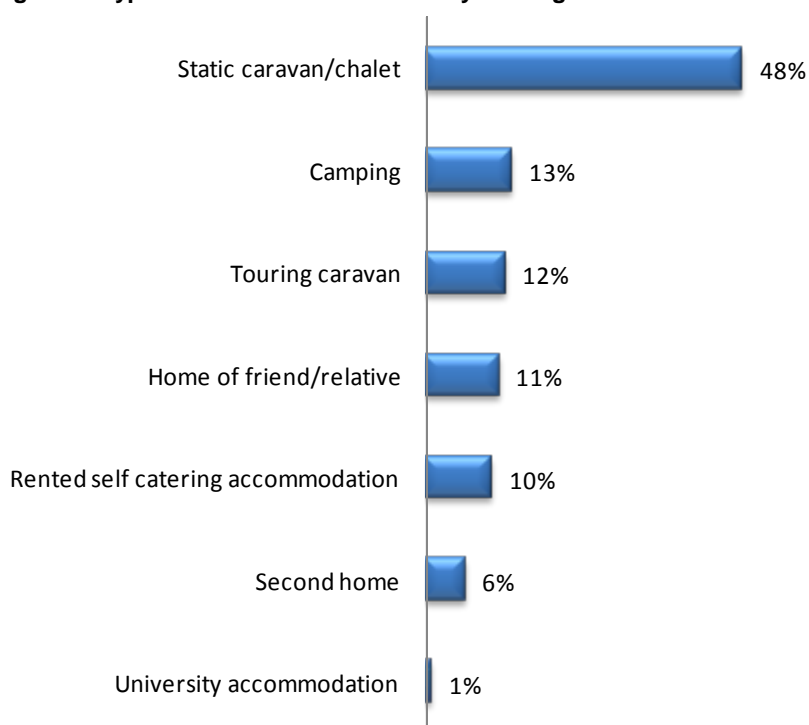
3.3   Average length of stay

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

Day visitor spends on avg. 5.0 hours on visit

Overnight visitor spends on avg. 8.9 nights on visit

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

Mode	Percentage
Car/motorcycle	96%
Train	2%
Coach trip	1%
Bicycle	1%
Bus service	1%
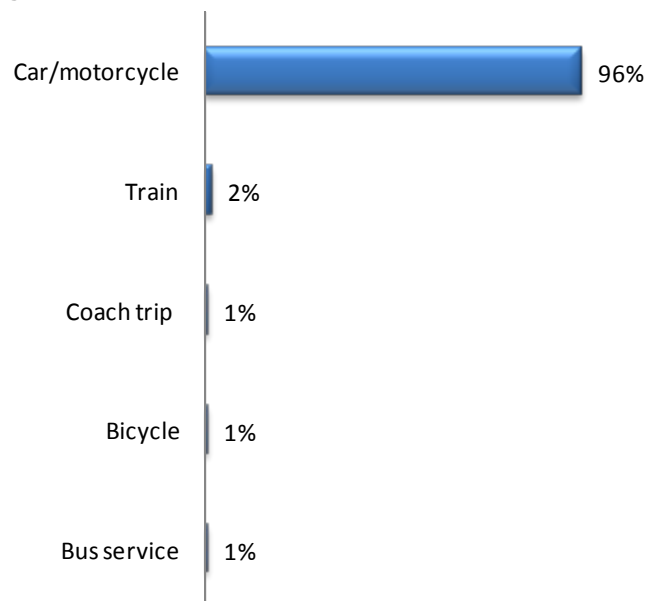
3.5 Activities undertaken / places of interest visited

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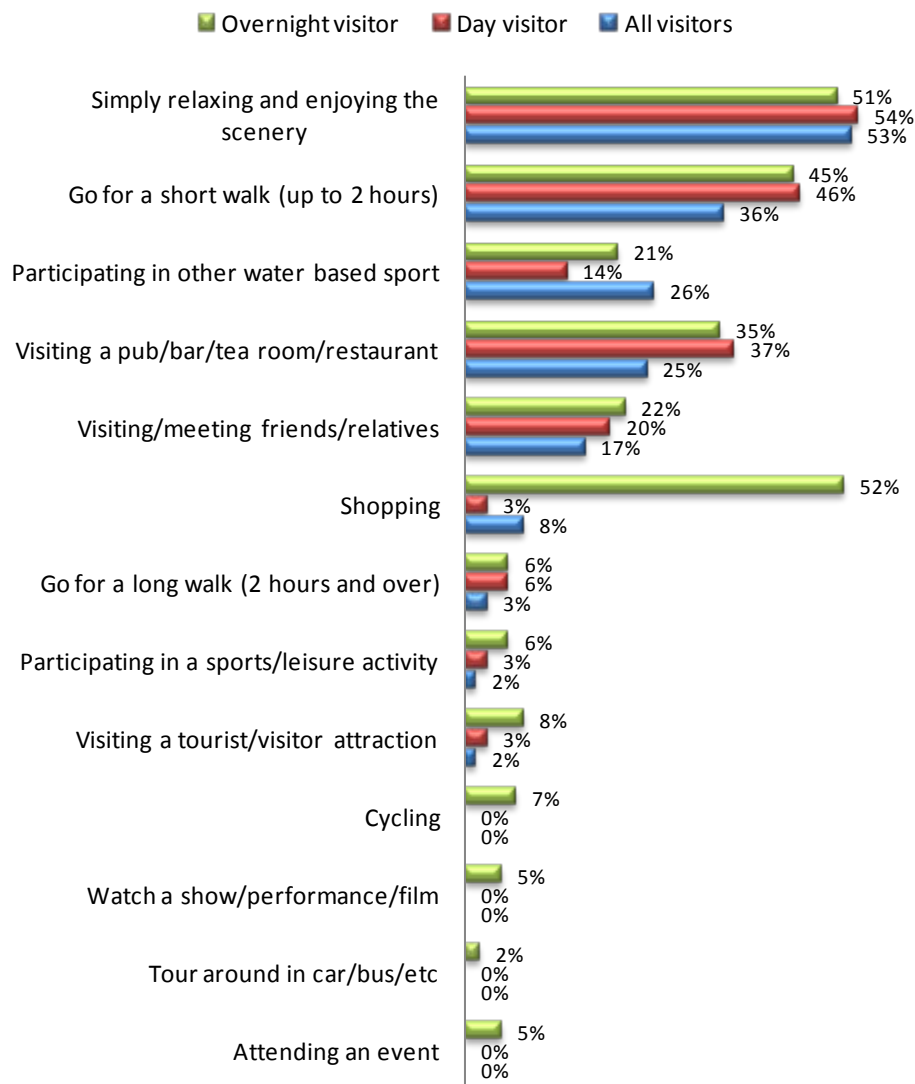
Note multiple responses permitted. Results do not sum to 100%

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

Never, first visit	At least once before	2 to 4 times before	5 to 10 times before	Visit monthly	Visit weekly	Last visit more than 12 months ago
21%	15%	22%	20%	10%	6%	6%
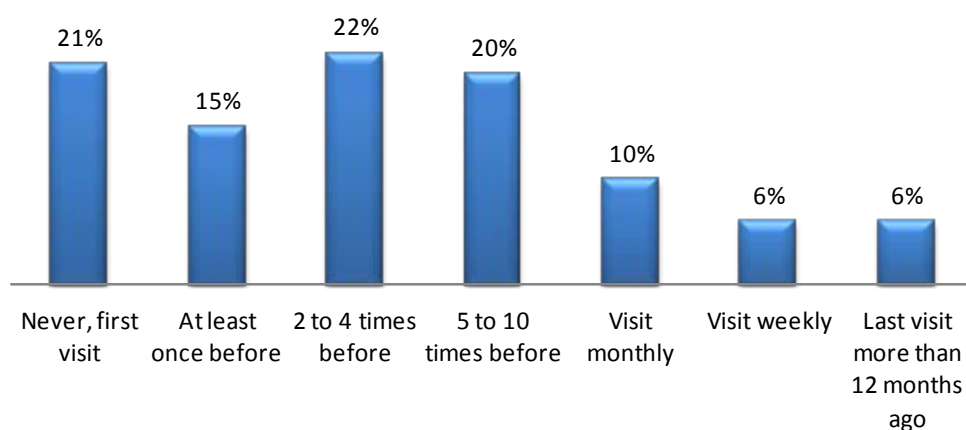
3.6.2   Frequency of previous visits was generally high with a quarter of day visitors having previously visited the town 2 to 4 times before and a quarter of overnight visitors having previously visited 5 to 10 times before.

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%

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