

# 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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