TSE RESEARCH

Coastal West Sussex
Tourism Research Project 2016

Summary
Report of Findings

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Coastal West Sussex Tourism Research 2016 - Key Learnings

1.1 The Coastal West Sussex Visitor Economy

Both domestic and international tourism have seen steady growth in recent years largely fuelled by the ‘staycation’ phenomenon and the profile given to Britain overseas during the 2012 London Olympic and Paralympics. The industry is also forecast to sustain that growth in the short to medium term.

The visitor economy in the Coastal West Sussex (CWS) area already makes a significant contribution to the overall value of the general economic well-being. The expenditure resulting from visitors was worth nearly £1bn in 2015 (£983m) accounting for the employment of nearly 11% (14,000 people) of the total workforce.

Occupancy rates in serviced accommodation reached 64% in 2015 up from 57% in 2007. This is 1% higher than the rate for England as a whole and growing at a faster rate although it is still below the regional average (71%).

Visits to attractions also increased in Coastal West Sussex at a rate higher than the national level (amongst a sample of visitor attractions in Coastal West Sussex).

Hence, CWS is in a good position to achieve growth in line with the national and international projections, However, it is important to understand what markets would bring the best economic benefit and what product development might be required to meet the needs of such markets.

1.2 Coastal West Sussex - the Visitor Profile

The C**WS area is heavily dependent on domestic visitors (95%) and with a large proportion of these (62%) coming from** Sussex or the neighbouring counties of Surrey and Hampshire. Perhaps surprisingly, only 6% are from the London area. However, 5% are from overseas which is twice the average across the region and the largest markets being Germany, the USA and Australia.

The vast majority of visitors arrive by car, with most visitor parties being either families or couples. A high proportion are from older age categories and most are on day-visits from home.Just over a quarter of visitors stayed overnight in the area averaging 6.6 nights and with the most popular forms of accommodation being caravans/chalets (22%) and hotels (22%). Those staying with friends and family is also an important market (20%)

The MOSAIC profiling of visitors reveals the core groups to be reasonably affluent families and couples with the visitor survey also identifying over 65% of them being in the ABC1 socio-economic group.

1.3 What appeals to Visitors about Coastal West Sussex?

CWS is clearly a popular area for repeat visits with two thirds being on a return visit and half of visitors giving ‘*visited before and wanted to come back’* as an answer in the survey. Hence, there is a loyal core market coming to the area and it can be safely assumed that the existing provision has an established appeal to those groups. Nearly 80% considered the overall trip enjoyment to be ‘high or very high’ and places to eat and drink, and accommodation were considered ’very good’. Visitor attractions and places to visit and, in some areas, shopping were less well regarded. The worst experiences seem to be centred around parking, traffic congestion and some locations being ‘shabby’ or ‘dated’ . The area is not considered to be particularly ’vibrant’.

85% of staying visitors were there on a holiday and, as expected, the presence of beach and waterbased/seaside activities is an important factor in influencing visitors to come but a lot of visitors considered it to be an area to relax with enjoyable scenery and opportunities for walks. Outdoor activities such as cycling or watersports were only mentioned by a relatively small number of visitors.

1.4 Future Target Markets for Coastal West Sussex

With such a loyal customer base and a high degree of satisfaction within these groups there is the potential to increase visits from these particular types. Hence, the MOSAIC groups could be used to guide marketing and product development initiatives. The non-visitor research also indicated that the existing product would appeal to new visitors with the majority (97%) stating that they would definitely/might be interested in visiting CWS. Two thirds saw it as a short break destination and about a quarter as a long stay holiday.

Non-visitors particularly thought that CWS '*looks like a great place for relaxing short break with a partner'; 'for walking/cycling, enjoying stunning countryside/coastline'* ; '*for a family beach holiday break with lots of things to do and see'.*and *'to immerse yourself in the area's rich culture and heritage'*

Non visitors thought CWS was less of a place for '*watersports or action packed activity holiday/breaks*' although it should be recognised that this is a perception and perhaps a lack of awareness that such opportunities may exist.

Another relevant finding from the non-visitor research is that those not currently visiting CWS have a tendency to holiday in Devon (28%) and Cornwall (13%) so consideration should be given to how, given they would have a high propensity to visit, CWS should position itself relative to the South West. Proximity, travel distance and short break options would be important in this respect.

Both the visitor and non- visitor research reveal a relatively low awareness of locations within West Sussex and even West Sussex itself .Only 42% of non-visitors from London, for example, could identify where CWS is. This would indicate that work needs to be done to raise the profile of the area within the capital. How the area is branded would be important in this regard. The Google analytics review points towards the use of Sussex or at least West Sussex in the brand – this is also supported by the relatively low awareness of individual destinations within the area in both surveys.

With regard to potential new target markets , the National Coastal Tourism Academy (NCTA) recently produced research that identified potential growth markets for coastal areas in the Under 35's . This market has a particular liking for fun, active,indulgent active holidays – not something that CWS is perceived as providing. The other main growth market identified by the NCTA – Empty Nesters – is more in line with the CWS offering.

The significant growth in international visitors should also be taken into account as they tend to stay longer and spend more. Near Europe – Germany, Holland, France - and the USA are probably the best prospects

1.5 Developing Coastal West Sussex as a Destination

There are significant CWS strengths to build on, specifically high visitor enjoyment and a loyal visitor base and there is potential to increase the numbers of visitors by building on those strengths.

Possible priorities for geographical targets include:

- London residents
- Those within short-break catchment area (2/3 hour drive time)
- International visitors- near Europe/North America

The branding of CWS should build on a cultural city and coastal offer but also ensure that its geographical location can be easily identified – the use of Sussex would appear to be fundamental to this. Within the marketing messaging and imagery consideration should be given to a more vibrant,fun and active type of destination in order to nurture new interest.

Product issues that may need to be addressed include ‘parking’, ‘traffic and access’ across the area and in some locations dealing with the ‘old fashioned, dated and shabby’. Generally, lower visitor satisfaction scores were also given for shopping and visitor attractions.

Occupancy in CWS serviced accommodation is currently below the regional average in both peak and off-peak seasons so there is existing capacity. However it will also be important for all markets to develop the commercial accommodation sector in CWS. There could be a range of measures including progressing major regeneration schemes, encouraging the development of budget hotels and even exploring the potential for direct local authority investment in the sector. There are also opportunities to develop self catering accommodation (cottage, apartments, etc) as well as holiday parks and villages, lodges, glamping, touring and caravan & camping – these types of accommodation are used particularly by the younger visitor markets.

The promotion of inward investment to drive growth and development of the visitor economy infrastructure will also be important together with the facilitation of such growth through proactive planning and development policies.

1.6 Case Studies

The Case Studies undertaken with successful businesses and events in CWS point towards a wider need across the area to have a greater understanding and acceptance of digital marketing and social media. This includes improvements to the digital profile whether on their own website or on listings within other external user generated content. The Case Studies also identified a number of key ‘soft’ development areas that are crucial to the effective delivery and ambition in the sector. The participants were asked to give their individual *‘Golden Tips’* in making a success of their enterprise. The responses included:-

‘Offer outstanding customer service and take care of your staff’

‘Look at what others are doing and do it better! From that you get excellent customer satisfaction and good reviews.’

‘*Don’t let anything get tired. Make sure everything is up to standard and keep looking freshly at everything.’*

‘*If you have a good business, make sure you market and promote it.’*

‘This is always a continual learning experience and success is down to team work and expertise.’

‘… make sure you manage budgets really well, as issues here can impact on productivity and staff morale.’

Such a ‘snapshot’ provides a useful priority list to guide where business support programmes may be most effectively targeted.

2 Introduction

In 2016, Coastal West Sussex commissioned Tourism South East to conduct a research programme incorporating:

- Visitor research
- Non-visitor research
- Social-listening review
- Postcode-segmentation analysis
- Review of Industry performance data
- Accommodation Review
- Case studies

The Coastal West Sussex area is defined as the districts of Chichester, Arun, Adur and Worthing. Separate reports were delivered for each aspect above. This document presents an overview of findings across all reports. These are outlined below.

3 Visitor Research

During the summer of 2016 1,899 visitors were personally interviewed from the start of the school summer holidays to the first week of September 2016. These were in the locations of Chichester (486), Selsey and Witterings (199), Worthing (396), Arundel (405), Bognor Regis (196) and Littlehampton (212).

3.1 Visitor Profile

Source of visitors

- 95% were from the UK and 5% from overseas
- One third UK visitors were from other parts of Sussex (33%) followed by Surrey (15%) and Hampshire (14%)
- Top overseas markets were Germany, Australia and USA.

Age Range

- 42% are aged 55 years and over and one third are retired
- Visitors to Worthing generally tend to be a little older than visitors to other parts of Coastal West Sussex whilst Bognor Regis and Littlehampton visitor groups are more likely to include children.

Visitor Group size

- The average group size is 2.9 people. This varies from an average group size of 1.89 among Chichester city visitors and 3.68 among Selsey visitors.
- The most common group composition among Coastal West Sussex visitors is the family group (41%). This is followed by couples (32%).
- There was a significant proportion of people visit on their own, but this is strongly influenced by a relatively large proportion of people visiting on their own encountered in the city centre of Chichester.

Visitor Socio-economic Status

- The largest group of visitors (41%) are from C1 occupational grade
- A quarter of Coastal West Sussex visitors are from AB occupational grade level households.
- 11% of Coastal West Sussex's visitors are from the DE occupational group
- Results by destination show that Selsey visitors are more likely to be from AB occupational backgrounds than those visiting other parts of Coastal West Sussex
- Arundel had the highest proportion of ABC1 (73%), followed by Chichester (66%)

3.2 Trip Features

Type of trip

- Around two thirds (62%) of Coastal West Sussex visitors are day visitors from home
- A further 11% are visiting for the day whilst staying overnight elsewhere
- Over a quarter (27%) are staying overnight in Coastal West Sussex
- The type of trip varies significantly between locations e.g. only 8% of people visiting the Chichester City were staying overnight in the city, whereas 78% of Selsey visitors were staying overnight in Selsey. Bognor Regis also has a relatively strong overnight visitor market (51% staying overnight).

Main reason for visit

- Of those on a day trip only a half described their visit as a leisure day out, with a significant proportion visiting for the day for other purposes such as seeing relatives or were on a special shopping trip. Of those in Chichester 27% gave shopping as the reason for visiting.

- The vast majority of overnight visitors were on holiday or a short break. Of the 27% encountered during the survey period, 23% described their visit as ‘Holiday/short break’.

Accommodation Used

- The types of accommodation used the most often by overnight visitors are static caravan/chalet accommodation found in holiday parks (22%), hotels (22%), and the home of friends or relatives (20%).
- Once again the results vary by destination making it challenging to present an overall ‘Coastal West Sussex’ picture. Hotels are the most common type of accommodation used by visitors staying in Chichester City, whereas holiday parks are popular for visitors staying in Selsey and Bognor Regis.

Average length of stay

- Day visitors spend on average 4.5 hours on their trip to Coastal West Sussex
- Day trips are shortest for those visiting the Chichester City (3.4 hours) and longest for those visiting Arundel (5.7 hours).
- Overnight visitors stay an average 6.6 nights.
- Trip length for overnight visitors also varies across destinations. Overnight visitors spend on average nearly 9 nights when staying in Selsey and Littlehampton and 3.5 nights when staying in Arundel.

Main Mode of Transport

- The car (78%) is the most common mode of transport used to reach Coastal West Sussex .
- Public transport is more likely to be used to travel to Chichester, Worthing and Bognor Regis. A small but significant proportion of visitors travel to Worthing by coach as part of a pre-booked coach trip (13%).

First time vs Repeat visits

- Almost a third of visitors (29%) were visiting Coastal West Sussex for the first time.
- Results by destination show that frequency of visit is relatively high among Chichester visitors; a fifth visit monthly and three-in-ten visit weekly. These are likely to be visitors who live in neighbouring towns and villages including those located in the wider district of Chichester

Activities Undertaken/Places visited

- The two most popular activities undertaken or planned to be undertaken are visiting a pub, bar, tea room, or restaurant (58%), and shopping(50%)
- A third of visitors enjoy relaxing and enjoying the scenery and a further third go for a short walk of up to 2 hours.
- At destination level, there are differences with the popularity of different activities. For example, shopping is far more popular among Chichester City visitors, whereas simply relaxing and enjoying the scenery is more popular among Worthing visitors.

Average Trip Expenditure

- Coastal West Sussex visitor spend on average £34.47 per person per day on their visit on items such as food and drink and visiting attractions.
- Overnight visitors incur an additional average spend per person per night of £17.35 on accommodation and £84.47 per person per trip.

- Average trip expenditure varies significantly across the destinations. Visitor spend per day is higher among Chichester City visitors (£45.10 per person per day) and lowest among Arundel visitors (£8.62 per person per day).
- Average overnight visitor expenditure per person on accommodation among Chichester City visitors may appear lower than might be expected for a historic city (for Bath its £44.94 and for York its £44.60). This finding needs to be set against the context that the overall proportion of visitors found to be staying overnight in the city was relatively low (8%) and many of these visitors stayed in the homes of friends or relatives or in second homes and thus incurred no additional accommodation expenditure.

3.3 Trip Motivations and Influences

Factors most important

- The top factor which played the most important role in the decision to visit Coastal West Sussex is 'Visited before and wanted to come back' (50%) - results at destination level reveal that the positive experience from a previous visit was particularly important among Littlehampton visitors (64% mentioned this aspect) and Selsey visitors (61% mentioned this aspect)
- The second most popular factor is 'Presence of beach and water based/seaside activities (41%).The presence of the beach and water based activities was the second most important factor influencing the decision to visit Selsey, Worthing, Bognor Regis and Littlehampton
- For a fifth of visitors, the family friendliness and opportunities for families was the most important factor influencing the decision to visit

Best Things about destination visited

- Key 'best things' coming out from visitor responses are specific to the destination. Beach is the aspect cited most often in Littlehampton, Bognor Regis and Selsey and equal best thing about Worthing, along with the seafront/promenade. 'Shopping' is the best aspect cited about Chichester, whilst the castle and history/culture are the best aspects of Arundel.

Worst Things about destination visited

- Issues around parking such as its availability, ease of finding and charges, appears to be the main 'worst thing' about Chichester City, Worthing, Arundel and Littlehampton. Traffic congestion appears to be the main negative aspect encountered in Selsey and is the second worst thing associated with Chichester City and Arundel.
- The main criticism of Bognor Regis was the perception that it is old fashioned, dated and shabby in parts of the town, and this was the second worst thing associated with Worthing.
- It is worth noting that overall, a third of the sample of visitors (36%) responded to the question on what they thought were the worst things about the destination visited. However, this varied with the destination in question; 77% of Bognor Regis visitors and 70% of Littlehampton visitors mentioned negative aspects of the destination compared to only 9% of Worthing visitors and 17% of Arundel visitors.

Aspects most strongly associated with destinations

- For Chichester City, the aspect most strongly associated with the city is the Cathedral and for Arundel it's the Castle.
- Beach/coastline/seafront is the aspect visitors most strongly associate with Selsey, Worthing, Bognor Regis and Littlehampton.

3.4 Visitor Ratings

Visitor ratings on vibrancy of destinations

- The overall average rating score for Coastal West Sussex was 3.1 out of 5 - around the middle of the vibrancy scale. Results by destination reveal that Littlehampton and Bognor Regis are seen to be slightly less vibrant and cosmopolitan than the other destinations though none received a high score on vibrancy.

Visitor satisfaction rates

- **Accommodation** - Among visitors staying overnight in commercial accommodation in Coastal West Sussex, the majority described the range, quality and value for money of accommodation as 'Very good'.
- **Visitor attractions & other places to visit** - Visitors gave the range, quality and value for money of places to visit average scores of 4 out of 5. A significant proportion rated this aspect as 'Average'.
- **Places to Eat & Drink** - Overall, around a half of all visitors rated the range, quality of service and value for money of places to eat and drink as 'Very Good'.
- **Shopping** - A small but significant proportion of visitors scored the three aspects of shopping as 'Average'. Overall, however, satisfaction was either 'Good' or 'Very good' among visitors
- **Ease of finding way around** - Visitor's satisfaction ratings on road and pedestrian signage were broadly similar – with most providing scores of 4 and over (overall average score of 4.5 out of 5 for both).

Overall trip enjoyment

- Overall trip enjoyment was relatively high. The average score for enjoyment at Coastal West Sussex level was 4.2.
- Overall trip enjoyment was high or very high for 79% of visitors
- Enjoyment was highest for Chichester and Selsey visitors

4 Non-Visitor Research

Research was conducted amongst non-visitors to explore current awareness and perceptions of Coastal West Sussex destinations, as well as future intentions to visit. In May to June 2016, 500 non-visitors took part in an online survey covering these issues. Respondents were from a range of regions in England.

4.1 Awareness of Coastal West Sussex

- There was highest awareness of these destinations in Coastal West Sussex; Chichester (84%), Bognor Regis (83%) and Worthing (82%).
- Just over half thought Coastal West Sussex was in the South East (55%), whilst 15% said South West, with various other regions mentioned, and one-in-ten could not give an answer.
- In general, respondents in London had a lower awareness of different destinations in Coastal West Sussex compared to other regions of England. In addition, 42% of respondents in London thought Coastal West Sussex was in the South East compared to 74% in the South East, 60% in the South West and 57% in the East Midlands.

4.2 Perceptions of Coastal West Sussex

Non-visitors were shown some images of places of interest in Coastal West Sussex and asked for their impressions of the region based on the images.

There was strongest agreement with:

- ‘Coastal West Sussex looks like a great place for a relaxing short break with a partner’ (93% agreement overall, 27% ‘strongly agree’ and 66% ‘agree’)
- ‘Coastal West Sussex looks like a great place for walking or cycling or enjoying stunning countryside/coastline’ (91% agreement overall, 31% ‘strongly agree’ and 60% ‘agree’)
- ‘Coastal West Sussex looks like a great place for a family beach holiday/break with lots of things to see and do’ (88% agreement overall, 32% ‘strongly agree’ and 56% ‘agree’)
- ‘Coastal West Sussex looks like a great place to immerse yourself in the areas rich culture & heritage’ (85% agreement overall, 25% ‘strongly agree’ and 60% ‘agree’)

4.3 Possible Future visits to Coastal West Sussex

- Over a third of non-visitors (37%) said they were ‘definitely interested’ in visiting Coastal West Sussex, 60% said they were ‘maybe’ interested and only 3% said they were not interested.
- The main reasons for wanting to visit were ‘beaches/seaside based activities/beautiful coastal scenery (40%). Also mentioned were ‘combination of beautiful countryside and stunning beaches’ (15%), ‘lots of things to see and do’ (13%) and ‘quaint picturesque towns/villages to explore’ (11%).
- If they were to visit, respondents said they would most likely take a ‘short break; 1 to 3 nights (65%), whilst nearly a quarter said they would take longer stays of 4+ nights. 8% said they would visit for a day-out.
- 41% said they would visit as an ‘adult-couple’, 34% as a ‘family’, 10% with ‘friends & family’, 8% with ‘friends’ and 7% ‘alone’.

5 Social-Listening Review

A social-listening review was conducted about the destinations of Arundel, Bognor Regis, Littlehampton, Chichester and Worthing.

5.1 Sources of Messages

- For all 5 destinations, twitter was the site which picked up most mentions, with especially high proportion of mentions for Bognor Regis and Chichester (74% and 52% of all mentions respectively).
- Instagram and facebook were sites which also contained a high proportion of messages. Instagram contained a high proportion of messages for Littlehampton and Arundel (31% and 28% respectively). Facebook contained a high proportion of messages for Worthing, Chichester and Littlehampton (36%, 26% and 24% respectively).

5.2 Message Content

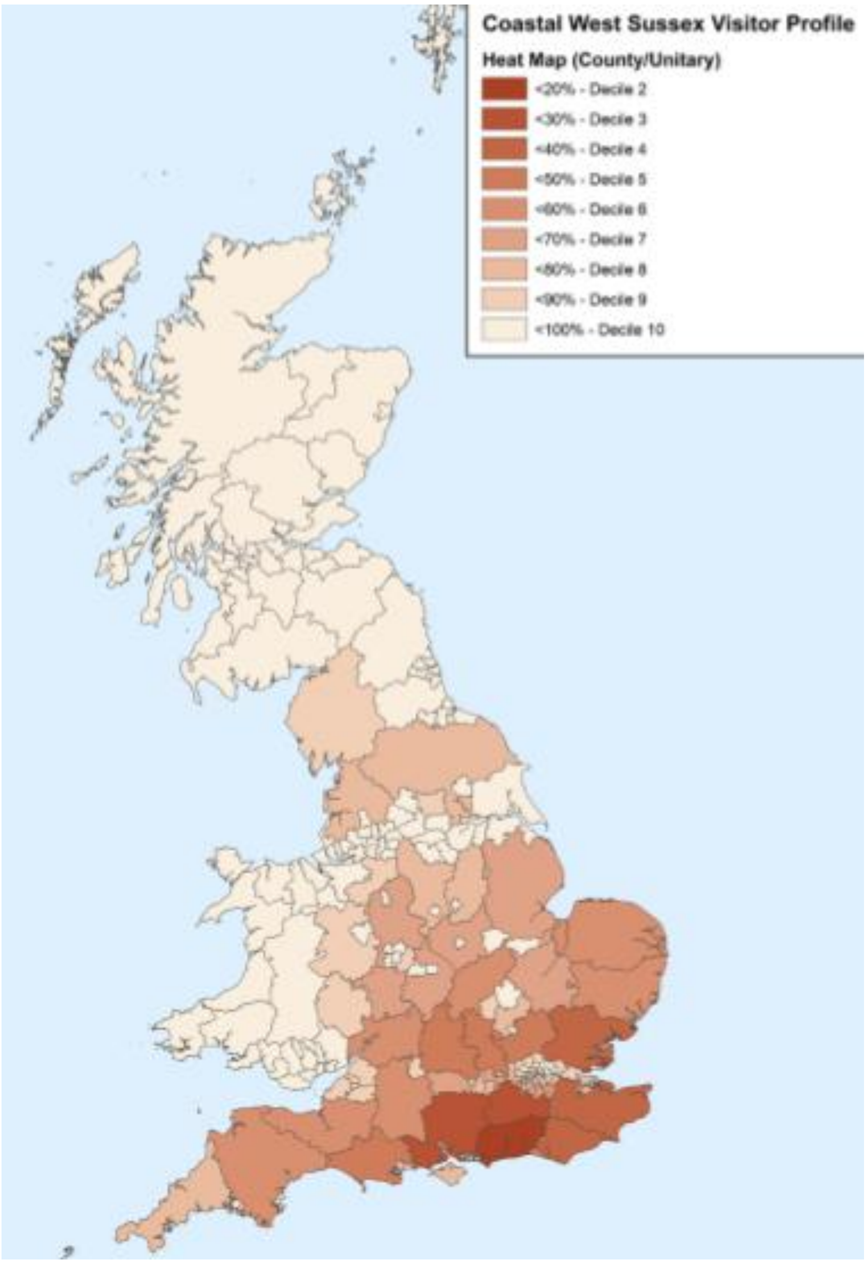
- Mentions for Arundel focussed on Arundel Castle, ‘ancient town’ and ‘English heritage/history’.
- Mentions for Bognor Regis mentioned Butlins, ‘family holiday’ and ‘family fun’.
- Littlehampton was mentioned in connection with ‘ice cream by the sea’, ‘summer holiday’ and ‘family fun’.
- Mentions for Chichester focussed on Goodwood Racing, ‘Cathedral/gardens’ and ‘Festival Theatre’.
- Mentions for Worthing mentioned Worthing Pier, ‘summer fun’ and ‘festivals and events’ and ‘gorgeous gardens’.

6 Postcode Segmentation Analysis

A postcode analysis was conducted using details collected from multiple visitor enquiries databases from 2014 to 2016. Postcodes are therefore from people who expressed an interest in visiting, but who may not have actually visited. Databases used were:

- 2014: Visit Chichester fulfilment request postcodes
- 2015/16: Brochure request for Worthing postcodes
- 2015/16: Brochure request request for Arun postcodes
- 2016: Bunn Leisure visitor postcodes
- 2016: Goodwood visitor postcodes

In total, 193,872 postcodes were used, 98.7% could be matched to Mosaic socio-demographic profiles. A distribution of enquirers is shown below



6.1 Mosaic Profiles

Overall analysis of Mosaic profiles shows that 3 groups stand out:

- Prestige Positions (17%)
- Country Living (13%)
- Domestic Success (13%)

These 3 profiles are significantly over-represented in the postcodes data collected (described above) compared to the broader population indicated by a positive index figure below:

- Prestige Positions (17% compared to 7% of the population)
- Country Living (13% compared to 6% of the population)
- Domestic Success (17% compared to 8% of the population)

Each of these main Mosaic types can be sub-divided into the following sub-categories, each of which are over-represented in the postcode data collected:

- Prestige Positions (17%)
    - Diamond Days
    - Alpha Families
- Country Living (13%)
    - Wealthy Landowners
- Domestic Success (13%)

A detailed profile of each of these segments is contained in the main Mosaic report for this project, however a summary is shown below:

Group B: Prestige Positions

Key Features

- High value detached homes
- Married couples
- Managerial and senior positions
- Supporting students and older children
- High assets and investments
- Online shopping and banking

Who we are

Age 56-65	Household income £100k-£149k
Household composition Family	Number of children 1 child
Tenure Owned	Property type Detached

Overview

Prestige Positions are affluent married couples whose successful careers have afforded them financial security and a spacious home in a prestigious and established residential area. While some are mature empty-nesters or elderly retired couples, others are still supporting their teenage or older children.

Core Features

Prestige Positions are well-educated couples who have reached senior and managerial positions in companies, or have accomplished professional careers. This is also the group most likely to have achieved success as directors of their own profitable businesses.

Prestige Positions live in large family homes even though some of them no longer have children living at home. These are expensive detached properties, frequently with five bedrooms and large mature gardens in easily commutable locations. Of those whose children have grown up many are still offering support, either with a place to live in the family home, or by supporting them through university. For this group the continued financial support of their children is not a problem. Almost all own their own home, many outright and, in addition to sizeable salaries or large pensions, they have a substantial investment portfolio making their financial situation very comfortable.

With busy lives to manage many make good practical use of the internet without spending long hours online. In particular they manage bank accounts online, search for savings accounts with the best interest rates, and save time by shopping online.

In general, Prestige Positions are attracted to premium brands, are able to afford expensive holidays and are well insured often including private medical insurance.

Group C: Country Living

Who we are

Age 66+	Household income £100k-£149k
Household composition Family	Number of children 1 child
Tenure Owned	Property type Named building

Key Features

- Rural locations
- Well-off homeowners
- Attractive detached homes
- Higher self-employment
- High car ownership
- High use of Internet

Overview

Country Living are well-off homeowners who live in the countryside often beyond easy commuting reach of major towns and cities. Some people are landowners or farmers, others run small businesses from home, some are retired and others commute distances to professional jobs.

Core Features

Country Living consists of affluent people who can afford to live in pleasant rural locations surrounded by agricultural landscapes. This population is divided between those still in work and retired people.
These people live in attractive, spacious detached homes that are often period properties or named buildings, and the majority are owned.

Incomes are good, either derived from occupational pensions, commuting to well-paid professional jobs or running successful farms or their own businesses - Country Living contains the highest proportion of self-employed people of any group. Asset holdings in the form of stocks and shares are high.

Living in the least densely populated rural locations means car ownership is high. Most households have at least two cars for tasks from grocery shopping, to doing the school run and commuting to work.

Although broadband speeds may be low, the internet is used for practical purposes as it gives this group access to a broader range of products and services than are available locally. The latest technology is not high on their agenda and mobiles aren't used extensively, probably due to less than reliable signals.

Group G: Domestic Success

Key Features

- Families with children
- Upmarket suburban homes
- Owned with a mortgage
- 3 or 4 bedrooms
- High Internet use
- Own new technology

Who we are

Age 36-45	Household income £70k-£99k
Household composition Family	Number of children 2 children
Tenure Owned	Property type Detached

Overview

Domestic Success are high-earning families who live affluent lifestyles in upmarket homes situated in sought after residential neighbourhoods. Their busy lives revolve around their children and successful careers in higher managerial and professional roles.

Core Features

Families in Domestic Success are headed by couples typically aged in their late 30s and 40s, many of whom have school age children. Parents in this group are the most likely to have a degree and may have delayed having children until their careers were established.

They now live in good-sized three or four bedroom detached properties, owned with a considerable mortgage outstanding. Their lives are now settled and they have very comfortable standards of living. These are homes they can expect to stay in while their children grow up.

Company car ownership is high, a benefit of working for well-known organisations or professional firms in sectors such as finance, property, information technology and professional services.

Domestic Success are frequent internet users. As well as being constantly connected for work, they enjoy the time-saving convenience of banking, shopping and managing bills online. They love owning the latest technology and, in addition to smartphones, they are the most likely group to own tablets.

7 Review of Industry Performance Data

A review was conducted of tourism-industry data, serviced accommodation occupancy and visits to attractions.

7.1 Industry Data

- Results from GBTS reveal that 102.7 million domestic overnight trips were taken in England in 2015, an increase of 10% compared to 2014. The value of domestic overnight trips increased by 8%, from £18billion to £19.6billion 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 trips in England, an increase of 7% compared to with 2014. Trip expenditure increased by 2% at the national level.
- Overseas visitors 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, leading 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%.
- Coastal West Sussex total spend by tourists in 2015 was £748,952,649 leading to total business turnover of £982,855,000. Tourism supported a total of 13,999 jobs in 2015.

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

7.2 Serviced accommodation occupancy

- Coastal West Sussex occupancy reached 64% in 2015, up from 57% in 2007. By comparison, occupancy in the South East region was 71% in 2015, up from 56% in 2007. In England as a whole, occupancy was 63%, the same as in 2007 (also 63%).

7.3 Visits to attractions

- 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 previous two years. Based on results provided by a sample of West Sussex attractions, most saw an increase in footfall in 2015 compared on 2014.

- Of attractions which were able to supply visitor numbers, the leading attractions by footfall were Tilgate Park and Nature Centre (500,000), Nymans (319,023) and Wakehurst Place (251,949).

8 Hotel & Visitor Accommodation Development Opportunities in Coastal West Sussex

A report was prepared assessing the potential opportunities for hotel and visitor accommodation development in Coastal West Sussex and the possible actions that the Coastal West Sussex local authorities and their partners might wish to consider to accelerate hotel and visitor accommodation development.

8.1 Hotel and Visitor Accommodation Demand

An analysis of previous studies show a consistent assessment of demand for hotel and visitor accommodation, specifically:

- A largely leisure-driven and seasonal accommodation market, characterised by strong weekend and summer demand with clear shortages of all forms of visitor accommodation at these times, but weaker midweek and winter demand,
- Strong demand for Premier Inn and Travelodge budget hotels, which consistently fill and turn business away throughout the year, both during the week and at weekends.
- A tougher market for full-service 3 star hotels due to the lack of midweek corporate demand: 3 star hotel performance is relatively weak as a result, in terms of both room occupancy and achieved room rates.
- Strong demand for high quality pub accommodation,
- Good demand for B&Bs and guest houses,
- High demand for self-catering accommodation between April and October and frequent shortages during the peak summer months, when most self-catering units are fully booked,
- Strong demand and frequent shortages of provision for touring caravanning and camping during the main summer months and at weekends between May and September if the weather is good,
- A stable market for caravan holiday home purchase and hire,
- Very high demand for family holidays and breaks at the Butlins Bognor Regis resort.

There is evidence from national trends in staying tourism that demand for hotel and visitor accommodation across Coastal West Sussex is likely to have strengthened, both during the recession (2009-2012) as a result of the growth in staycation demand, and since 2013 as a result of the recovery and growth in the economy. With relatively little change in overall accommodation supply, the shortages of accommodation identified in the previous studies are likely to have remained and may have become more acute.

8.2 Accommodation Development Opportunities

All of the previous studies and the review of national hotel and visitor accommodation development trends, show similar opportunities for accommodation development, including:

- Budget hotel development in the main towns and resorts: Bognor Regis Seafront, Littlehampton Seafront and Chichester East remain targets for Premier Inn, while Shoreham-by-Sea is a target for Travelodge. There could also be potential for a third budget hotel in Worthing, most likely as part of the Teville Gate scheme or another major regeneration project;
- Possible scope identified in the 2008 Coastal West Sussex Hotel & Visitor Accommodation Futures Study for midmarket upper-tier budget or 3 star hotels in Bognor Regis and Worthing, given anticipated growth in corporate demand. The 2013 Adur & Worthing Hotel & Visitor Accommodation Futures Study did not however reaffirm the potential for a hotel of this standard in Worthing, as the growth in corporate demand

had not materialised in the way that had been expected before the 2008-2012 recession. This could also be the case in Bognor Regis,

- Potential for the acquisition of 3 star hotels in Bognor Regis and Worthing by coaching holiday companies. This has happened in Bognor Regis, with the acquisition by Leisureplex Hotels on the Royal Norfolk Hotel, but not in Worthing, where the resort's 3 star hotels remain in private ownership,
- Scope possibly for the development of small boutique hotels in Arundel, Chichester, Worthing, Littlehampton and Shoreham-by-Sea, most likely through the repositioning of existing small hotels, large guest houses or pubs with rooms, but potentially also through the conversion of suitable properties. The 2008 Coastal West Sussex Hotel & Visitor Accommodation Study did not identify potential for boutique hotels in Bognor Regis however,
- Potential for further hotels at the Butlins Bognor Regis resort and scope possibly for hotels on some of the area's larger holiday parks,
- A need for the ongoing upgrading of existing hotels,
- The likelihood of some small, low quality hotels coming forward for conversion to residential use where all reasonable efforts to find new owners that are prepared to invest have been exhausted. This has happened in Bognor Regis with the closure of the Royal Hotel on the seafront for conversion to residential apartments, and the recent granting of planning permission by Worthing Borough Council for the conversion of The Kingsway Hotel on Worthing seafront into residential apartments,
- The possible opening of country house hotels in the rural hinterland of Coastal West Sussex, if suitable properties become available for conversion,
- The development of hotels on golf courses,
- The development of good quality pub accommodation, including boutique inns, and new-build pub restaurants with adjacent lodge accommodation on the edge of some of the main towns,
- The opening of restaurants with rooms,
- The upgrading of guest houses and B&Bs, including some to a contemporary/ boutique style,
- The opening of new B&Bs to replace those that close as owners retire,
- Potential for guesthouses and B&Bs to develop family rooms and suites to cater for the family market,
- Possible opportunities in the rural hinterland for farmhouse B&Bs if there are farming families here that wish to provide such accommodation,
- The development of facilities for walkers and cyclists at rural B&Bs,
- The opening of B&B for Horses establishments in the rural hinterland,
- The development of hotel and/or B&B accommodation linked to wedding venues,
- The development of wellness retreats,
- Potential for the development of serviced or self-catering apartments in Worthing, and in the longer-term at Shoreham Harbour in terms of the letting of residential apartments, the full or partial conversion of hotels, or purpose-built serviced or self-catering apartment blocks,
- Additional holiday cottages through the letting of residential properties and conversion of barns and other agricultural buildings, including holiday cottage complexes with leisure, large 'super' cottages for family and friend get togethers, 5 star and boutique holiday cottages, and access exceptional self-catering properties suitable for use by independent wheelchair users,
- Holiday lodge development, in terms of individual lodges, small lodge complexes, and woodland, lakeside or marina-side holiday lodge parks, with units for rental and/or outright or timeshare purchase,
- The development of eco lodges, small complexes of eco lodges and eco lodge parks,

- The opening of fishing lodges associated with fishing lakes, golf lodges on golf courses, and possibly lodge accommodation at equestrian centres,
- The ongoing upgrading, development and possible expansion of holiday parks, including the replacement of caravan holiday homes with holiday lodges and the introduction of other forms of accommodation such as camping pods and glamping units,
- The development of new holiday parks, given suitable sites that can achieve planning permission,
- Some self-catering treehouse developments in suitable woodland or forest settings;
- The improvement, development and expansion of existing touring caravan and camping sites, and extension of operating seasons, including potentially year-round operation,
- The development of new touring caravan and camping sites, given suitable sites that can achieve planning permission;
- Glamping provision,
- The development of small camping pod sites,
- A possible opportunity for a surfing pod development at Shoreham or Lancing Beach;
- Scope potentially for a children's activity holiday centre, given a suitable property and site,
- Potential for residential activity centres linked to outdoor pursuits and water sports centres, including the proposed hostel and watersports centre at Lancing Beach.

A range of policy initiatives are recommended to facilitate the development of the above accommodation, to meet potential demand. These policy options are outlined in the full report.

8.3 Recommendations for Proactive Public Sector Interventions to Support and Accelerate Hotel and Visitor Accommodation Development

All of the studies make similar recommendations regarding more proactive public sector intervention to support and accelerate hotel and visitor accommodation development and help grow staying tourism;

- Proactive local promotion of the opportunities for accommodation development
- Work to identify and market suitable sites and properties for hotel development and larger scale visitor accommodation schemes;
- The provision of tailored business support and quality improvement initiatives for the visitor accommodation sector, including if possible grant aid or other financial assistance;
- Destination marketing and events and product development focused on boosting off-peak business;
- The development of the corporate market for hotel accommodation through the progression of office and business park development projects and the attraction of occupiers that will generate strong demand for hotel stays;
- Periodic reviews of studies to ensure up-to-date information, evaluate the impact of any interventions, and establish ongoing opportunities and priorities.

The full report also outlines potential forward actions that the Coastal West Sussex local authorities and their partners could consider in order to bring forward, support and encourage the types of hotel and visitor accommodation provision that the previous studies identified potential for. These include:

- Progressing the major regeneration schemes
- Identifying and investigating potential budget hotel sites in Littlehampton, Chichester and Shoreham-by-Sea that can be put to Premier Inn and Travelodge
- Consideration of direct council investment in new budget hotel projects

- Identify and investigate potential sites for major accommodation development schemes on the coast and in the rural hinterland, including holiday parks, holiday lodge parks and touring caravan and camping sites
- Undertaking new research to check that the hotel and visitor accommodation development opportunities that the previous studies have identified remain valid, and assess whether there are any barriers that are holding back accommodation development in Coastal West Sussex
- Raise awareness of visitor accommodation development opportunities in Coastal West Sussex
- Secure and focus the allocation of potentially available funds for visitor accommodation development in Coastal West Sussex through the Sussex Downs and Coastal Plain LEADER Programme, Coast to Capital LEP EAFRD Programme, and possible future rounds of funding through the Coastal Communities Fund

9 Case Studies of Best Practice

A review was conducted of tourism-industry data, serviced accommodation occupancy and visits to attractions.

9.1 Outline of Case Studies

Case studies were conducted which identified examples of best practice across selected visitor economy categories across Coastal West Sussex. Reviews were conducted of their online presence and relevant user generated content. Recommendations were made based on reviews in the following sectors; Accommodation Providers, Visitor Attractions, Dining & Drinking and Events. Best practices was identified in the following tourism businesses;

- **Serviced Accommodation -** Regency Rooms, Littlehampton BN17 5LJ
- **Holiday Rentals/Holiday Homes** - The Coast House, Worthing BN11 2BN
- **Speciality Lodging** - Plush Tents Glamping, Chichester PO18 9AW
- **Attraction** - Chichester Cathedral, Chichester PO19 1RP
- **Dining & Drinking** - The Corner House, Worthing BN11 1DJ
- **Event -** Arundel Festival, Arundel, BN18 9AP
- **Other -** Turner's Pies, Bognor Regis, Chichester and Rustington
- **Stand out case study** - Arundel Castle and Gardens, Arundel BN18 9PA

9.2 Examples of Best Practice

Best practice was achieved most notably by the following:

Serviced Accommodation - Regency Rooms, Littlehampton scores very highly on guest reviews, earning them multiple certificates of excellence. They also are rated highly across a number of Online Travel Agents, with corresponding positive reviews. They have embraced social media with a well populated Facebook page with both its own FB reviews and links to TripAdvisor reviews, and maintain a website with clean design, clear navigation, good content and ability to book online.

Holiday Rentals/Holiday Homes - The Coast House, Worthing has secured 'excellent' reviews on TripAdvisor, supported by eighteen quality images and comprehensive supporting narrative. Their website clean, clear and functional, with online real-time booking functionality though could benefit from a somewhat 'warmer' descriptive tone.   A number of online travel agent platforms are also used to market their property.

Speciality Lodging - Plush Tents Glamping, Chichester

Plush Tents Glamping have embraced multiple social media with significant social media exposure through Facebook, Twitter, Pinterest, You-Tube and Instagram. This has been underpinned by a strong TripAdvisor listing and comprehensive website, with flowing inspirational video images.

They have also exploited being a TSE Beautiful South Award finalist and TripAdvisor GreenLeader Platinum Award winner.

Attraction - Chichester Cathedral, Chichester

Chichester Cathedral dominates TripAdvisor both locally #1 and within West Sussex as #2 but has also embraced social media by having active Facebook, Twitter, You Tube, Pinterest and Instagram accounts. It also has secured a substantial number of media appearances and catering awards. Its website needs significant updating as looks old-fashioned and scores poorly on website.grader.com at 49/100 mainly through lack of mobile compatibility and very poor SSL security.

Dining & Drinking - The Corner House, Worthing

This new pub in Worthing has garnered accolades from Sussex Life and quickly risen to the TripAdvisor #1 ranking for Bars & Pubs in West Sussex. This has been achieved through a strong social media presence across Facebook, Twitter and Instagram. Its Facebook page is particularly active promoting events such as its first birthday in January 2017 and pie and pint nights, it has secured positive reviews from 70+ reviewers achieving a 4.5 out of 5.0 Facebook ranking.

Event - Arundel Festival, Arundel

The Arundel Festival has primarily used local marketing in the form of press, PR and posters, supported by social media including Facebook and Twitter, securing 2.6k likes on Facebook and 1.6k followers on Twitter. There is certainly an opportunity to widen the promotion of this event outside the immediate local area. The Festival website looks modern and colourful, but scores poorly on search engine optimisation and site security.

Other - Turner's Pies, Bognor Regis, Chichester and Rustington

Exceptionally high TripAdvisor rankings and active social media, underpinned by good local and national PR from a number of prestigious food awards, have all contributed to Turners pies raising their profile from a local pie shop chain towards that of a tourism destination in its own right, with a great interactive, transactional website which scores well at 76/100 on website.grader.com.

Stand out case study - Arundel Castle and Gardens, Arundel

Midnight was appointed to deliver a comprehensive media relations campaign to increase national and regional awareness of Arundel Castle, enhance the profile of its historical and educational offer and deliver the Castle's first social media campaign.

They have created a fully supportive press office and developed relationships with key journalists from the national and regional media as well as from target sectors such as travel, historical interest, parenting and education.

A social media campaign was also developed for the Castle, utilising popular platforms Twitter, Facebook and Pinterest, with very positive effects on visitor numbers and wide media coverage.

9.3 Structured Interviews

We undertook a structured interview with as many of the selected businesses as possible to give additional narrative as to where the owner/manager felt they had succeeded, the reasons why, challenges and plans for the future. The structured interviews were conducted in early 2017.

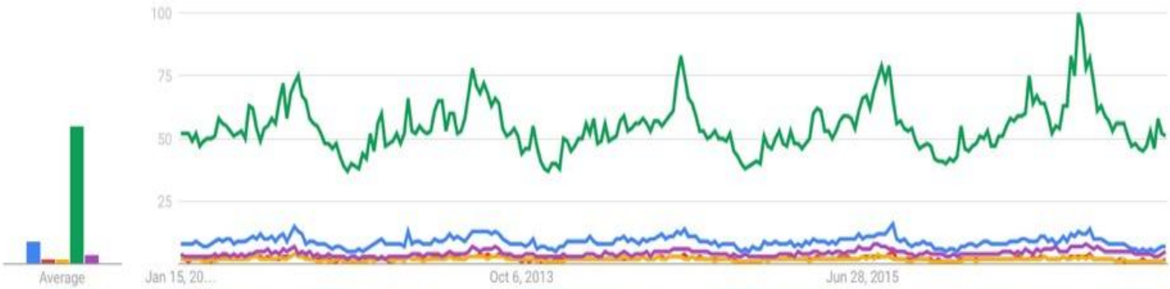
Key Learning Points:

- Owners attention to detail, personally checking quality standards are maintained
- Look after your staff, even contractors, make them feel part of the team
- Respond quickly and efficiently to reviews both good and bad
- Use your unique selling points to generate media interest
- Enter awards competitions, they generate great publicity
- Keep an eye on the competition, for comparison and possibly new ideas
- Customers really like to see locally sourced food
- Recognising the need for and budgeting for upgrading and renewals
- Keep on top of your website and social media, they are critical to promotion
- Tight budgetary control is essential, keep an eye on costs
- Hard work, enthusiasm and attention to detail are essential to success

9.4 Online Presence

The report highlights the importance of user generated content (UGC) in the tourism industry, noting that a report by Oxford Economics published in April 2016 claimed TripAdvisor influenced 8.7m trips and 90.7m bed nights in the UK, valued at £14.3bn.

Coastal West Sussex as with both West and East Sussex have a core lack of identity and therefore suffer when it comes to how consumers search for online data.



Google searches for the last 5 years: ●Brighton, ● Sussex, ● Chichester, ● West Sussex, ●East Sussex

The graph above shows that within organic open (UK) searches within Google within 'Travel' category both West and East Sussex searches are significantly lower than a key known destination term such as Brighton, even with Chichester a comparatively high-profile destination it does not significantly resonate much higher than the two Sussex terms.

The lack of a sub-regional destination profile does present an issue to businesses attempting to place themselves within a known wider destination e.g. Award Winning Restaurant in the Heart of the Cotswolds immediately places the business in a known destination.

The next-steps within the project should be to identify cost-effective, practical and accessible ways to encourage Coast West Sussex tourism businesses to fully embrace the importance of their digital profile. This would include businesses assessing all aspects of their website , their presence on TripAdvisor, and through social media (Facebook, Twitter, Instagram, etc).

Accredited by:

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MRS Evidence Matters™ Company Partner

IQCS Interviewer Quality Control Scheme