Report of Findings for VisitBrighton

Brighton Visitor Survey 2014

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TSE Research is a member of the Market Research Society Partner Scheme and our fieldwork is accredited by the Interviewer Quality Standards Scheme

CONTENT

1. Introduction

1.1 Study purpose and objectives

Over the peak summer period of 2014 TSE Research was commissioned by VisitBrighton to undertake a major piece of research into the leisure visitor market. The overall purpose of the study was to enhance VisitBrighton's understanding of the city's tourism market and provide the basis for tourism policies. With regard to the latter, it was essential that the research would identify elements driving visitor satisfaction. An additional goal was to track changes in the profile and experiences of visitors by comparing the results to the 2009 visitor survey.

To achieve the aims set out by VisitBrighton, the following research objectives were set:

1. To collect up to date information on the origin, profile, behaviour and opinions of day and staying visitors to Brighton & Hove;
2. Identify which market sectors VisitBrighton are likely to generate repeat business from and which are most at risk;
3. Calculate the components currently contributing most to customers' satisfaction and to identify emerging trends in order to inform marketing initiatives;
4. To compare the results to the previous visitor survey and identify key changes;
5. To measure effectiveness of current marketing and branding.

1.2 Research methodology

To maintain consistency with the 2009 visitor survey the same research tools and definitions were adopted for this survey. The survey involved face-to-face interviews with a random sample of visitors[1] who were at least half way through their visit[2]. Individual interviewing sessions were carried out from the hours of 11am to 6pm between July and September 2014.

A copy of the questionnaire is attached in Appendix 1.

In all, 2,771 people were stopped for interview. Of these 973 (35%) were not eligible to complete the interview and 852 (31%) refused to be stopped. In total 946 (34%) adult visitors were successfully interviewed at key locations in Brighton & Hove.

[1] *Those visiting for non-leisure purposes, e.g. trips concerned with their normal work, study or household shopping were nit included in the survey.*

[2] *Because satisfaction surveys rely on visitors having used or experienced a particular service or facility, interviewing was not conducted before 11am*

The target sample of 1,000 was lower than that of 2009 (1,200), but despite our best efforts we were still unable to meet the target. We carried out two additional sessions to help redress the problem, but with such a long questionnaire and the addition of asking people to complete the equalities monitoring form it was difficult to obtain 20 complete interviews in a five hour session. Also, the poor weather conditions experienced over some parts of the August created both practical problems in terms of paper-based questionnaire interviews on-street and in terms of the flow of visitors during rainy days.

Overall, 625 (66%) completed interviews were achieved during the month of August, 195 (21%) and 126 (13%) completed interviews were achieved in July and September respectively.

Response rates for each survey location are shown in Table (i).

Table (i): Response rates

Location	Number of interviews	%
Train Station	38	4%
North Laine	40	4%
Coach Station	20	2%
New Road (including Pavilion and area outside TIC)	189	20%
East Street and Lanes	48	5%
Brighton Marina	47	5%
Beach (between both piers)	288	30%
Madeira Drive	253	27%
Churchill Shopping Centre	6	1%
Electric Railway	17	2%
Western Road/Palmeira Square	0	0%
Total	**946**	**100%**

It is acknowledged that street surveys of this type are liable to under-represent certain sectors of the visitor market, including touring coach parties and staying business visitors. Overseas visitors are also likely to be under-represented, since interviews were conducted in English and therefore tend to exclude non-English speakers.

1.3 Statistical reliability

All sample surveys are subject to statistical error that varies with the sample size. Table (ii) below shows the respective sample achieved for each visitor type and gives the margins within which one can be 95% certain that the true figures will lie (assuming the sample is random).

Table (ii): Sample size & margins of error at 95% confidence interval

	RESULT	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	Sample	+/-	+/-	+/-	+/-	+/-
Day visitors from home	407	2.9	3.9	4.5	4.8	4.9
Day visitors on holiday	172	4.5	6.0	6.8	7.3	7.5
Staying visitors	367	3.1	4.1	4.7	5.0	5.1
Domestic	730	2.2	2.9	3.3	3.6	3.6
Overseas	216	4.0	5.3	6.1	6.5	6.7
Overall survey sample	**946**	**1.9**	**2.5**	**2.9**	**3.1**	**3.2**

The margins of error shown above should be borne in mind when interpreting the results within this report.

1.4 Presentation of findings

Key findings are presented under the following headings:

- Type of trip
- Visitor profile
- Characteristics of visit
- Visitor expenditure
- Visitors' opinions

Key findings generally refer to all visitors; however commentary is provided where there is a significant difference between visitor types (e.g. day visitors from home, day visitors on holiday and staying visitors).

1.5 Definitions

'Day visitors from home' – visitors who had travelled to Brighton and Hove from, and were returning to, homes outside of Brighton and Hove on the day of their visit.

'Day visitors on holiday' – visitors travelling to Brighton and Hove for the day from holiday bases outside of Brighton and Hove.

'Staying visitors' – visitors staying overnight in accommodation in Brighton and Hove.

2. Survey results

2.1 Visitor type

A total of 946 visitors were interviewed in Brighton and Hove during 2014. Of these, 61% were day visitors which is divided between day visitors from home (43% of all visitors) and day visitors travelling to Brighton & Hove for the day while staying away from home or en route to other locations, and who were not staying overnight in the city (18%).

The survey found that over half (56%) of all day visitors on holiday were staying in other parts of East Sussex, 17% were staying in West Sussex, 18% were staying in London and the final 9% were staying elsewhere in the region.

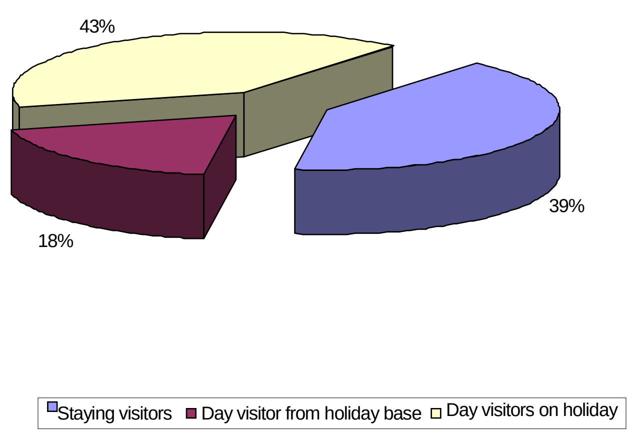
The remaining 39% of visitors were staying overnight in commercial or non-commercial accommodation within Brighton and Hove.

Table 1: Type of visitor

	2014	2009
Day visitors from home	43%	41%
Day visitors on holiday	18%	19%
Staying visitors	39%	40%

When compared with the findings from the 2009 survey, the proportion of all visitor types was very similar. The proportion of staying visitors at 39% has remained comparable to previous surveys (40% in 2009 and 39% in 2007).

Figure 1: Type of visitor 2014



2.2 Profile of visitor

2.2.1 Domestic/Overseas

The split between visitors from home locations within the UK and those from overseas has altered compared with 2009. Domestic visitors have decreased to 77% (83% in 2009), whilst overseas visitors increased to 23% (17% in 2009).

Table 2: Domestic/Overseas visitors

	All visitors 2014		All visitors 2009
Domestic visitors	730	77%	83%
Overseas visitors	216	23%	17%
Total	**946**	**100%**	**100%**

2.2.2 Home location of all visitors

The highest proportion of all visitors were from home locations in the South East (25%) and London (21%),

This is similar to the findings from the 2009 survey, when more visitors were also from home locations in the South East (31%) and London (20%). A total of 23% of visitors were from overseas locations compared with 17% in 2009.

Results split by trip type reveal that 43% of all day visitors from home came from the South East, whilst over a third (38%) travelled from London. The home locations of domestic day visitors on holiday and staying visitors in Brighton and Hove were widespread throughout the UK.

Table 3: Home location of all visitors

	All visitors 2014		All visitors 2009	Day visitors from home	Day visitors on holiday	Staying visitor
London	201	21%	20%	38%	3%	11%
South East	237	25%	31%	43%	6%	13%
South	55	6%	5%	10%	2%	3%
South West	44	5%	4%	3%	4%	7%
East Anglia	35	4%	3%	1%	3%	7%
East Midlands	43	5%	4%	2%	9%	6%
West Midlands	27	3%	4%	<1%	7%	4%
North West	18	2%	5%	-	3%	4%
Yorkshire	23	2%	2%	<1%	4%	4%
North East	7	1%	2%	-	1%	2%
Wales	23	2%	2%	-	5%	4%
Scotland	13	1%	1%	<1%	2%	2%
Northern Ireland	4	<1%	-	<1%	-	1%
Outside UK	216	23%	17%	1%	5%	33%
Total	**946**	**100%**	**100%**	**100%**	**100%**	**100%**

Of the overseas visitors encountered in Brighton & Hove during the 2014 survey, the popular origins were Germany, France, Spain and the Netherlands. The United States and Australasia were also popular overseas origins for visitors. In the 2014 the options of Scandinavia, Russia and China were added to the list of choices for home location, as a consequence the 2009 data shows '0' for these locations.

Table 4: Home location of overseas staying visitors

	All overseas visitors 2014	All overseas visitors 2009	Staying in Brighton	Staying elsewhere in East Sussex	Staying elsewhere in West Sussex	Staying in London	Staying elsewhere
Germany	15%	13%	13%	28%	18%	-	27%
Spain	13%	6%	13%	8%	18%	8%	18%
Netherlands	12%	8%	11%	10%	9%	12%	-
France	11%	13%	11%	15%	9%	19%	-
Australasia	9%	9%	7%	5%	9%	12%	-
Italy	7%	6%	6%	-	-	4%	-
United States	4%	7%	5%	13%	18%	23%	9%
Rep. of Ireland	4%	-	5%	-	-	-	-
Russia	3%	6%	3%	3%	-	4%	-
Canada	3%	-	3%	-	-	-	-
Scandinavia	2%	5%	2%	10%	-	4%	9%
China	2%	2%	2%	3%	-	-	9%
Belgium	2%	-	1%	5%	-	-	9%
Other	14%	27%	16%	3%	18%	15%	18%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

** Scandinavia, Russia and China not specified on list in 2009*

'Other' countries listed in the open response (mentioned by fewer than 1% of the sample) was made up of a wide range of countries and included Austria, United Arab Emirates, Cyprus, Turkey, Channel Islands, Saudi, Czech Republic, Hong Kong, Iceland, Bulgaria, Indonesia, Brazil, Trinidad, Switzerland, Poland, Burma, Columbia, Latvia and South Africa.

It should be noted that overseas visitors tend to be under represented in face to face visitor surveys due to difficulties experienced when interviewing visitors for whom English is not their first language.

2.2.3 Group size and composition

The average size of groups surveyed in 2014 was 2.65 people (2.13 adults and 0.52 children), which is much higher than the average group size in 2009 (2.31 people).

Day visitors on holiday averaged the largest group size at 2.84 people (2.43 in 2009). Day visitors from home contained the largest proportion of children at 0.69 per visitor group.

At an average of 2.36 people per group, the group size for staying visitors was also higher in 2014 compared with 2009 (2.05).

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Table 5: Average group size – by visitor type

	Average number of people per group		
	Adults	**Children**	**Total**
All visitors 2014	2.13	0.52	2.65
Day visitors from home	2.14	0.69	2.82
Day visitors on holiday	2.27	0.56	2.84
Staying visitors	2.05	0.31	2.36
All visitors 2009	1.97	0.34	2.31

As shown in Table 6, 76% of groups to Brighton and Hove contained adults only (down from 81% in 2009). Almost half (44%) of the groups overall contained two adults only. Twenty percent of all groups contained just a single adult.

A quarter of groups to Brighton and Hove contained children, an increase of 5% points from 2009.

Table 6: Group composition

	All visitors 2014		All visitors 2009
One Adult	188	20%	26%
Two Adults	415	44%	47%
Three Adults	60	6%	4%
Four Adults	46	5%	3%
Five + Adults	13	1%	1%
Adults Only	**722**	**76%**	**81%**
One adult and one child	24	3%	2%
One adult and two or more children	18	2%	2%
Two adults and one child	60	6%	4%
Two adults and two or more children	82	9%	6%
Three adults and one child	9	1%	2%
Three adults and two or more children	15	2%	1%
Four or more adults with one or more children	16	2%	2%
Adults and Children	**224**	**24%**	**19%**
Total	**946**	**100%**	**100%**

2.2.4 Age and Gender Profile

Given the high proportion of groups containing adults only, it is not surprising to find that only 18% of all visitors were children (although this has increased by 3% points since 2009).

The largest proportion of visitors fell into the 25-34 age category (16%), closely followed by the 35 to 44 years and 45-54 years categories (14% in each). As shown in Table 7, overleaf, the gender profile shows that females (60%) were better represented than males (40%).

Table 7: Age of visitors

	All visitors 2014	Day visitors from home	Day visitors on holiday	Staying visitors
0-17	18%	22%	19%	12%
18-24	11%	12%	9%	10%
25-34	16%	13%	15%	19%
35-44	14%	10%	17%	16%
45-54	14%	11%	15%	16%
55-64	13%	14%	11%	13%
65-74	11%	13%	8%	10%
75+	4%	4%	6%	3%
Total	**100%**	**100%**	**100%**	**100%**
Male	**40%**	**40%**	**43%**	**39%**
Female	**60%**	**60%**	**57%**	**61%**

2.2.5 Socio-economic status

The socio-economic profile of visitors to Brighton and Hove is based on the occupation of the households' highest income earner and takes into account the previous occupation of those who were retired. Table 8 provides a definition of each socio-economic status.

Table 8: Definitions of each socio-economic status

Grade	Socio-economic status	Occupation type
A	Upper middle class	Higher managerial, administrative or professional
B	Middle class	Intermediate managerial, administrative or professional
C1	Lower middle class	Supervisory or clerical, junior managerial, administrative or professional
C2	Skilled working class	Skilled manual workers
D	Working class	Semi and unskilled manual workers
E	Welfare dependant	Those entirely dependent on the state long-term through sickness, unemployment, old age; casual workers

Overall, 30% of all visitors to Brighton & Hove fell into the affluent 'AB' socio-economic group (28% in 2009), while a further 37% were 'C1s' (44% in 2009). Fifteen percent of all visitors fell into the C2 category whilst 18% of visitors comprised of the lowest 'DE' groups (22% and 5% in 2009 respectively).

As shown in Table 9, below, more staying visitors (67%) fell within the affluent AB and C1 socio economic classifications compared to day visitors from home (63%) and day visitors on holiday (68%).

Table 9: Socio-economic status comparisons

	All Visitors 2014	All Visitors 2009	Day visitors from home	Day visitors on holiday	Staying visitors
AB	30%	28%	27%	32%	32%
C1	37%	44%	36%	38%	39%
C2	15%	22%	16%	15%	14%
DE	18%	5%	22%	15%	15%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

2.3 Trip characteristics

2.3.1 Main purpose of trip

All visitors were asked about their main purpose for visiting Brighton and Hove on the day that they were interviewed. The majority of visitors (82%) described their visit as a holiday or leisure based visit, while a further 11% were there to see friends and/or relatives. Results for VFR are lower than the results from 2009 (15%). However, there was a significant difference in the proportion of people on a holiday/leisure visit (73% in 2009).

Business/conference visitors accounted for only 2% and language students accounted for 3% of all visitors. Please note that business/conference visitors and language students tend to be under-represented in surveys of this kind due to the timing and location of on-street survey sessions.

Table 10: Main purpose of trip

	All visitors 2014		All visitors 2009	Day visitors from home	Day visitors on holiday	Staying visitors
Holiday/Leisure	778	82%	73%	83%	88%	79%
Visiting friends or relatives	102	11%	15%	9%	6%	14%
Special shopping trip (non-regular)	14	1%	4%	3%	-	<1%
Language student	28	3%	3%	1%	3%	4%
Business/conference visit	16	2%	2%	2%	1%	2%
Shopping trip (household/regular shopping)	-	-	-	-	-	-
Other e.g. house-hunting	8	1%	2%	1%	1%	<1%
Total	**946**	**100%**	**100%**	**100%**	**100%**	**100%**

2.3.2 Previous trips

For 30% of all visitors this was not their first visit to Brighton and Hove, having either visited for a day or staying visit in the past.

Forty five per cent of visitors had not visited Brighton and Hove on a day trip in the last 12 months (41% in 2009). The remaining 55% had visited on at least one previous occasion, with 9% indicating that they had visited Brighton and Hove more than 10 times. Staying visitors (67%) and day visitors on holiday (63%) were significantly more likely not to have visited Brighton and Hove on a **day trip** within the last 12 months than day visitors from home (27%).

Table 11: Previous day trips (last 12 months)

	All visitors 2014	All visitors 2009	Day visitors from home	Day visitors on holiday	Staying visitors
Once before	15%	14%	17%	23%	10%
2 or 3 times before	14%	19%	18%	8%	10%
4 to 10 times	16%	17%	24%	3%	8%
More often	9%	9%	14%	2%	5%
None	45%	41%	27%	63%	67%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

Thirty-nine percent of all visitors had been on a staying visit to Brighton and Hove within the last 3 years - the same proportion as in 2009. The remaining 61% had visited on a staying trips on at least one previous occasion.

The proportion of day visitors from home (77%) and day visitors on holiday (74%) that had not spent any overnight trips in the last 3 years was very high. In contrast, 78% of staying visitors **had** stayed overnight in Brighton and Hove on at least one occasion within the last 3 years, of which 10% had visited more than 10 times previously.

Table 12: Previous staying visit (last 3 years)

	All visitors 2014	All visitors 2009	Day visitors from home	Day visitors on holiday	Staying visitors
Once before	14%	11%	10%	6%	23%
2 or 3 times before	15%	13%	8%	13%	27%
4 to 10 times	9%	11%	4%	6%	18%
More often	5%	5%	2%	1%	10%
None	58%	61%	77%	74%	22%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

2.3.3.1 Location of accommodation used by day visitors on holiday

All day visitors on holiday were asked to indicate the location of their accommodation. These locations include elsewhere in East Sussex (95 visitors), West Sussex (29 visitors), London (30 visitors), and further afield (16 visitors).

2.3.3.2 Accommodation used by staying visitors

All 367 visitors staying in Brighton & Hove were asked to indicate the type of accommodation they were staying in. Nearly two thirds (63%) of staying visitors were found to be staying in serviced accommodation in Brighton and Hove (50% in hotels and 13% in B&B/Guest houses). Compared with the 2009 survey, there has been an increase in the numbers staying in hotels (up 8 percentage points) and in those staying in B&B/Guest houses (up 3 percentage points).

A further 20% of all staying visitors were staying in the homes of friends or relatives, although this has fallen from 2009 when 28% were staying with friends or relatives.

The results split between domestic and overseas visitors reveal that a domestic visitor is more likely to be staying in a hotel whereas an overseas visitor is more likely to be staying in the home of friends or family.

Table 13: Type of accommodation used for staying trips

	All staying visitors 2014		All staying visitors 2009	Domestic visitors	Overseas visitors
Hotel	183	50%	42%	56%	39%
Home of friend/relative	73	20%	28%	18%	24%
B&B/Guest House	48	13%	10%	12%	16%
Self-catering (Cottage/Apartments)	19	5%	4%	5%	6%
Caravan/Camping	15	4%	4%	5%	2%
Youth Hostel	8	2%	3%	2%	2%
University accommodation	2	1%	2%	<1%	1%
Boat/Yacht	3	1%	1%	1%	1%
Holiday home/Timeshare	2	1%	1%	1%	1%
Language school	2	1%	1%	<1%	1%
Self-catering (Holiday Complex/Village)	-	-	1%	-	-
Pub/Inn	-	-	<1%	-	-
Other	12	3%	4%	<1%	9%
Total	**946**	**100%**	**100%**	**100%**	**100%**

2.3.4 Sources used to choose accommodation

When asked what sources they used to choose their accommodation, the majority (62%) of visitors indicated that they had searched online prior to their arrival in Brighton and Hove. Sixteen percent had received a recommendation from others, 9% used a brochure and 4% had visited a Visitor Information Centre.

A further 10% had used an 'other' source to choose their accommodation, the results of which are shown in section 2.3.4.2.

There was no significant difference between domestic and overseas visitors who used the internet to choose their accommodation (62% and 63% respectively). However, domestic visitors (27%) were slightly more likely to base their decision on recommendations from others (14% overseas).

Table 14: Sources used to choose accommodation

	Staying visitors 2014		Domestic visitors	Overseas visitors
Online	183	62%	62%	63%
Visitor Information Centre	13	4%	5%	3%
Brochure	27	9%	10%	8%
Recommendation from others	48	16%	17%	14%
Other	29	10%	9%	12%
Total	**300**	**100%**	**100%**	**100%**

2.3.4.1 Specified online sources

Staying visitors specified the online source they used to choose their accommodation. Of these, a high proportion had visited Trip Advisor (20%), Followed by Booking.com (13%) then the VisitBrighton website (10%) and Trivago (10%).

Table 15: Specified online sources used to choose accommodation

	Staying visitors 2014		Domestic visitors	Overseas visitors
Trip Advisor	36	20%	15%	31%
Booking.com	24	13%	11%	17%
Visit Brighton	19	10%	8%	15%
Trivago	18	10%	10%	8%
Google	14	8%	7%	8%
Travelodge Website	11	6%	6%	5%
Expedia	8	4%	5%	3%
Laterooms.com	8	4%	5%	3%
Hotels own website	7	4%	4%	3%
Hostel World website	6	3%	4%	2%
Premier Inn website	5	3%	3%	2%
Brighton hotels	5	3%	2%	3%
Lastminute.com	4	2%	3%	-
Hotels.com	4	2%	2%	3%
Cheaprooms.com	4	2%	2%	2%
The Caravan Club website	3	2%	2%	-
Brighton Holiday Homes website	3	2%	2%	-
Holiday Inn	3	2%	2%	-
Hostel bookers	3	2%	2%	2%
Cottages4u.com	3	2%	-	5%
KGB Deal	2	1%	2%	-
Thistlehotel.com	2	1%	2%	-
Groupon	2	1%	2%	-
Buy a Gift	2	1%	2%	-
UK campsites	1	1%	1%	-
Cheap B&Bs in Brighton	1	1%	1%	-
Gmail	1	1%	-	2%
Jury Inn website	1	1%	1%	-
Travel Republic	1	1%	1%	-
Hotwire.com	1	1%	1%	-
Hotels4u.com	1	1%	1%	-
Harvester pubs	1	1%	1%	-
Secret Escapes	1	1%	1%	-
Ebookers.com	1	1%	1%	-
Landmark Trust	1	1%	1%	-
Brighton Pride	1	1%	1%	-
Not specified	5	3%	2%	3%
Total	**183**	**100%**	**100%**	**100%**

2.3.4.2 Other sources

Other sources used by staying visitors before their visit to Brighton and Hove included phoning the hotel directly (28%), chosen by language school (24%) and booked through a travel agent/tour operator (24%).

Table 16: Other sources used to choose accommodation

	Staying visitors 2014		Domestic visitors	Overseas visitors
Phoned hotel	8	28%	44%	-
Language School	7	24%	-	64%
Travel agent/Tour operator	7	24%	22%	27%
Stayed at that particular accommodation before	4	14%	22%	-
Looked around on arrival in Brighton	2	7%	6%	9%
Lonely Planet	1	3%	6%	
Total		**100%**	**100%**	**100%**

2.3.5 How staying visitor booked their accommodation

When asked how they had booked their particular accommodation, just over half (51%) of staying visitors had used the internet, 42% had booked directly with their accommodation provider and a further 2% had booked via a Visitor Information Centre. The remaining 5% had used an 'other' method and the results of this are shown in section 2.3.5.1.

Domestic visitors were more likely than overseas visitors to book their accommodation either online (52% compared to 48%) or direct (43% compared to 40%). On the other hand, overseas visitors were more likely via an 'other' source (10% compared to 3%).

Table 17: How staying visitors booked their accommodation

	Staying visitors 2014		Domestic visitors	Overseas visitors
Online	150	51%	52%	48%
Direct	123	42%	43%	40%
Visitor information centre	6	2%	2%	2%
Other	15	5%	3%	10%
Total	**294**	**100%**	**100%**	**100%**

2.3.5.1 Specified online sources

The staying visitors that booked online specified the source they used to book their accommodation. A higher proportion had booked via Booking.com (16%) and a further 10% had booked through Trivago.

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Table 18: Specified online sources used to book accommodation

	Staying visitors 2014		Domestic visitors	Overseas visitors
Booking.com	24	16%	14%	20%
Trivago	15	10%	10%	9%
Visit Brighton website	10	7%	7%	7%
Travelodge website	9	6%	7%	4%
Expedia	8	5%	6%	4%
Hostelworld.com	7	5%	5%	4%
Hotels own website	7	5%	3%	9%
Laterooms.com	5	3%	4%	2%
Premier Inn website	5	3%	4%	2%
Lastminute.com	5	3%	5%	-
Pride website link	5	3%	4%	2%
Cheaprooms.com	5	3%	3%	4%
Trip Advisor	4	3%	3%	2%
The Caravan Club website	4	3%	4%	-
Hotels.com	4	3%	2%	4%
Language school	3	2%	1%	4%
Brighton Holiday Homes website	3	2%	3%	-
Thistle hotel	2	1%	2%	-
Groupon	2	1%	2%	-
Camping UK	1	1%	1%	-
Google	1	1%	1%	-
Gmail	1	1%	-	2%
Travel Republic	1	1%	1%	-
Hotwire.com	1	1%	1%	-
Buy a Gift	1	1%	1%	-
Hotel Bookers	1	1%	1%	-
Quirky Brighton Hotels	1	1%	1%	-
Waterside Properties	1	-	2%	
Secret Escapes	1	1%	1%	-
Ebookers.com	1	1%	1%	-
Can't remember	12	8%	5%	16%
Total	**150**	**100%**	**100%**	**100%**

2.3.5.2 Other method of booking

When asked to specify which other method they used to book their accommodation, 40% had booked through a language school and 33% through a tour operator.

Table 19: Other method to book accommodation

	Staying visitors 2014		Domestic visitors	Overseas visitors
Language School	6	40%	-	67%
Through a friend/family	4	27%	50%	11%
Travel Agent/Organised tour	5	33%	50%	22%
Total	**15**	**100%**	**100%**	**100%**

2.3.6 Number of overnight trips made each year

When asked how many overnight trips they make every year for all purposes (holiday/leisure, VFR, business etc.), more than two thirds (68%) of all staying visitors indicated that they take an average of 1-5 overnight trips. A further 22% tend to go on 6 to 10 overnight trips a year while the remaining 10% take on average more than 10 overnight trips a year.

Trip numbers ranged between 1 and 70 nights, resulting in an average of 4.93 overnight stays. The average number of overnight trips made each year by domestic visitors (5.51) is significantly higher than those of overseas staying visitors (3.77).

Table 20: Number of overnight trips made each year

	All staying visitors		Domestic visitors	Overseas visitors
1 to 5	248	68%	67%	70%
6 to 10	82	22%	21%	25%
11 to 15	11	3%	4%	1%
16-20	4	1%	2%	-
21-25	1	<1%	<1%	-
26-30	2	1%	1%	-
31-35	-	-	-	-
36-40	1	<1%	<1%	-
41-45	-	-	-	-
46-50	2	1%	1%	-
51+	2	1%	1%	-
None	14	4%	3%	5%
Total	**367**	**100%**	**100%**	**100%**
Average mean overnight trips		**4.93**	**5.51**	**3.77**

2.3.7 When did you decide to make your trip to Brighton and Hove

All visitors were asked to specify when they decided to make their trip to Brighton and Hove. For thirty nine percent of visitors the decision was made within a week of their visit. The highest proportion of these visitors had made their decision the day before their visit (17%), while some made their decision on the day (8%), a few days before they arrived (8%) and a week before (6%).

It should come as no surprise that day visitors from home, and to an extent day visitors on holiday, were more likely to decide to visit Brighton and Hove in a shorter period of time and decided to make their trip within a week prior to their visit (65% of day visitors from home and 40% of day visitors on holiday). In contrast, staying visitors were more likely to plan their visit in advance, with 74% making their decision more than two months before their visit.

Domestic visitors were more likely than overseas visitors to decide to visit Brighton and Hove closer to their visit, with 46% indicating that their decision was made within a week of their visit compared with only 22% of overseas visitors.

Table 21: When visitors decided to make their trip to Brighton and Hove

	All visitors 2014		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Day of visit	79	8%	16%	8%	-	10%	3%
Day before visit	165	17%	30%	21%	2%	19%	11%
Few days before visit	77	8%	13%	6%	4%	10%	3%
1 week ago	60	6%	6%	5%	7%	7%	5%
2 to 4 weeks ago	134	14%	16%	8%	15%	17%	6%
2 months ago	86	9%	4%	8%	15%	8%	14%
3 months ago	60	6%	1%	7%	12%	5%	11%
4 months ago	26	3%	1%	5%	4%	3%	3%
5 months ago	6	1%	-	1%	1%	1%	1%
6 months ago	62	7%	1%	8%	13%	5%	13%
7 months ago	92	10%	7%	7%	14%	10%	10%
9 months ago	4	<1%	-	1%	1%	<1%	1%
1 year ago	12	1%	1%	3%	1%	1%	1%
2 years ago	60	6%	<1%	9%	11%	4%	16%
3 years ago	1	<1%	-	-	<1%	-	<1%
Frequent visitor every year	9	1%	1%	1%	1%	1%	<1%
Don't remember	13	1%	1%	5%	<1%	1%	2%
Total		**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

2.3.8 What was the initial 'trigger' for thinking about visiting Brighton and Hove

All visitors were asked what the initial 'trigger' was that prompted their decision to visit Brighton and Hove.

For fourteen percent of all visitors, the initial trigger was wanting to visit the beach. A further 11% had just felt like having a day out. For 10% the trigger was to visit family or friends and for 7% it was to take family or friends out for the day. A further 8% had visited Brighton and Hove because the weather was good.

For day visitors from home, the 'trigger' to visit to Brighton and Hove was most likely to have visited the beach (19%) or because of good weather (15%). Day visitors on holiday on the other hand were most likely to indicate that a trip to the beach (14%) and visiting the Pavilion (10%) had prompted their visit to the city that day. Staying visitors were more likely to have visited due to the enjoyment of a previous visit (10%) or be visiting family or friends (15%).

Overseas visitors were more likely to be visiting due to a recommendation by friends or family compared with domestic visitors (11% compared to 2%).

Due to the number of responses to this question, only the top 20 responses are shown in Table 22 below. The full list can be found in Appendix 2.

Table 22: What was the initial 'trigger' for thinking about visiting Brighton and Hove

	All visitors 2014		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Trip to the beach	136	14%	19%	14%	10%	15%	13%
Just felt like a day out	107	11%	16%	11%	6%	13%	5%
Visit family/friends	95	10%	8%	5%	15%	10%	10%
Good weather	75	8%	15%	4%	2%	10%	2%
Take friend/family for day out	66	7%	5%	5%	10%	6%	9%
Lots to see and do	56	6%	6%	5%	7%	6%	6%
Know it well	54	6%	2%	4%	10%	5%	6%
To see Pavilion	42	4%	2%	10%	5%	3%	9%
Never been before	38	4%	2%	9%	4%	4%	4%
Recommended by family/friend	35	4%	1%	9%	4%	2%	11%
Shops/Antiques/The Lanes	34	4%	6%	2%	2%	4%	2%
Part of coach trip/organised tour	27	3%	3%	8%	1%	3%	3%
Haven't been for a long time	26	3%	2%	4%	3%	3%	1%
Special treat for birthday/anniversary	24	3%	3%	-	3%	3%	-
Direct trains to Brighton	21	2%	2%	1%	3%	2%	1%
Close to London	19	2%	3%	1%	2%	2%	2%
Brighton Pride/gay friendly	19	2%	<1%	2%	4%	1%	4%
Conference/Business	16	2%	2%	-	2%	2%	-
Heritage/culture/atmosphere	15	2%	1%	2%	2%	1%	4%
Sealife Centre	13	1%	3%	1%	-	2%	-
Other responses	*78*	*2%*	*<1%*	*3%*	*5%*	*3%*	*8%*
Total	**946**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

2.3.9 Transport used for making trip

The highest proportion of all visitors (37%) had travelled to Brighton and Hove by private car, van or motorcycle. This relatively high usage of motor vehicles for travel is fewer than the findings from 2009, when 42% of all visitors had also travelled by private car, van or motorcycle.

Visitor use of public transport also differed (53% in 2014 and 49% in 2009). This is due to an increase in visitors arriving by train (40% in 2014 compared to 36% in 2009).Those visitors travelling by bus or coach service was the same as in the previous survey – 13%. Only 8% arrived in Brighton and Hove as part of a private coach tour, although this increased by two percentage points on 2009.

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Table 23: Mode of transport used

	All visitors 2014		All visitors 2009	Day visitors from home	Day visitors on holiday	Staying visitors
Car/van/motorcycle	349	37%	42%	39%	31%	37%
Train	378	40%	36%	38%	34%	45%
Bus/coach service	121	13%	13%	14%	20%	8%
Coach tour	78	8%	6%	9%	12%	6%
Motorhome	5	1%	1%	<1%	1%	1%
Private yacht/boat	2	<1%	-	-	1%	<1%
Walked/on foot	4	<1%	-	-	-	1%
Bicycle	2	<1%	-	<1%	-	<1%
Taxi	6	1%	-	-	1%	1%
Mobility scooter	1	<1%	-	-	1%	-
Total	**946**	**100%**	**100%**	**100%**	**100%**	**100%**

2.3.10 Length of stay

Table 24, below, shows that 38% of all staying visitors in 2014 were on a short break of 2-3 nights. Results split by domestic and staying visitors reveal significant differences. Over half (57%) of domestic visitors were on a short break of 1-3 nights, whereas two thirds of overseas visitors (38%) were on a longer trip of over 7 nights.

Table 24: Duration of trip for staying visitors

	All visitors 2014		All visitors 2009	Domestic visitors	Overseas visitors
1 night	45	12%	13%	16%	5%
2-3 nights	141	38%	39%	41%	33%
4-7 nights	116	32%	29%	36%	24%
8-14 nights	38	10%	6%	4%	22%
Over 14 nights	27	7%	13%	3%	16%
Total		**100%**	**100%**	**100%**	**100%**

The majority (86%) of day visitors spent over five hours in Brighton & Hove.

Table 25: Duration of trip for day visitors

	All day visitors 2014		All day visitors 2009	Day visitors from home	Day visitors on holiday
1-2 hours	11	1%	2%	1%	3%
3-4 hours	115	12%	21%	20%	18%
5-6 hours	240	25%	43%	38%	27%
Over 6 hours	580	61%	34%	42%	52%
Total	**946**	**100%**	**100%**	**100%**	**100%**

2.3.11 *Information sources used*

All visitors were presented with a list of sources of information and asked whether any of these had influenced them to visit Brighton & Hove.

Overall, 37% of visitors did not use any information source prior to their trip compared to 44% in 2009. A further third (36%) had received information from family members, friends or colleagues (26% in 2009.)

Other sources of information used by visitors prior to their visit included previous experience/knowledge of Brighton and Hove (25 visitors), other travel guides (4 visitors), higher education (7 visitors), Sealife Centre (5 visitors), theatre/concert (4 visitors) and business (5 visitors).

Table 26: Sources of information used to plan trip – by visitor type

	All visitors 2014		**All visitors 2009**
Leaflets/brochures	71	8%	6%
Posters	4	<1%	1%
Newspaper/magazine adverts	11	1%	2%
Newspaper article/magazine feature	10	1%	1%
Time out guide	28	3%	1%
Radio advert	-	-	<1%
Radio programme	2	<1%	<1%
TV advert	1	<1%	<1%
TV programme	25	3%	2%
Website or web advertisement	196	21%	8%
Travel agent	21	2%	1%
Visitor information centre	30	3%	1%
Family/friends/colleagues	341	36%	26%
Used no information prior to trip	354	37%	44%
Other	42	4%	5%

N.B. Multiple responses permitted

As shown in Table 27, overleaf, when split down by visitors groups proportionately more day visitors from home (51%) had not used any sources of information prior to their visit compared to both day visitors on holiday (32%) and staying visitors (25%).

Table 27: Sources of information used to plan trip – by visitor type

	Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Leaflets/brochures	5%	11%	8%	7%	10%
Posters	<1%	1%	1%	1%	-
Newspaper/magazine adverts	1%	2%	1%	1%	<1%
Newspaper article/magazine feature	1%	2%	1%	1%	2%
Time out guide	<1%	6%	4%	2%	7%
Radio programme	-	-	1%	<1%	-
TV advert	-	1%	-	-	<1%
TV programme	1%	6%	3%	1%	7%
Website or web advertisement	12%	23%	29%	18%	29%
Travel agent	1%	5%	3%	2%	4%
Visitor information centre	1%	4%	5%	2%	8%
Family/friends/colleagues	30%	34%	43%	34%	44%
Used no information prior to trip	51%	32%	25%	42%	22%
Other	5%	4%	4%	5%	3%

N.B. Multiple responses permitted

2.3.12 Activities undertaken

All visitors were shown a list of leisure activities and asked whether they had, or intended to, participate in any of these during their visit.

As shown in Table 28, the 6 most popular activities were 'Visiting the beach or seafront' (87%), 'Just walking around' (78%), 'Going to a restaurant or place to eat out' (75%), 'Visiting a tourist attraction' (60%), 'Shopping' (59%), and just 'Relaxing/enjoying view/picnicking etc.' (43%). All six activities were the same top six as in 2009 but ranked in slightly different order.

Only 1% of visitors mentioned 'other' activities. These consisted of attending a meeting/conference (3 respondents), visiting friends or relatives (2 respondents), participating in a dance competition (1 respondent) and visiting the Choccywoccydoodah shop (1 respondent) that the city has to offer.

Table 28: Leisure activities undertaken – by visitor type

	All visitors	2014	All visitors 2009	Day visitor from home	Day visitors on holiday	Staying visitor	Domestic visitors	Overseas visitors
Visit a pub/club	344	36%	31%	22%	33%	54%	33%	47%
Going to a restaurant or place to eat out	706	75%	78%	75%	61%	80%	75%	72%
Just walking around	736	78%	88%	75%	80%	80%	78%	77%
Walking/cycling in surrounding countryside	55	6%	8%	2%	5%	10%	5%	9%
Going to an event	40	4%	7%	<1%	2%	10%	4%	6%
Going on organised trip/tour	41	4%	5%	1%	8%	6%	3%	8%
Shopping	554	59%	67%	53%	51%	68%	59%	56%
Going to see a film/show/gig/theatre	101	11%	10%	4%	8%	19%	8%	19%
Relaxing/enjoying view/picnicking etc.	404	43%	54%	41%	37%	47%	44%	38%
Visiting tourist attraction	570	60%	57%	49%	70%	68%	57%	72%
Visiting the beach/seafront	820	87%	72%	83%	83%	92%	85%	93%
Pursuing a hobby/special interest	35	4%	3%	1%	3%	7%	3%	5%
Pursuing a water sport/interest	25	3%	1%	2%	1%	4%	3%	2%
Viewing architecture	180	19%	25%	12%	23%	25%	18%	24%
Other	7	1%	2%	<1%	1%	1%	1%	-

N.B. Multiple responses permitted

2.3.12.1 Events and attractions visited

As shown in Table 29, overleaf, out of the visitors that indicated they were attending an event, the most popular was Brighton Pride (3% of all respondents).

When asked to specify which attraction(s) they had visited or planned to visit during their trip, overwhelmingly the most popular was the pier (41%). This was followed by the Lanes (12% and Pavilion (9%).

Table 29: Events gone to

	No. of responses
Brighton Pride	24
Football	4
Hen/Stag do	3
Music Festival	2
Races	2
Air Show	2
Retired Police Convention	2
Charity event	1

Table 30: Attractions visited

	No. of responses
Pier	391
The Lanes	114
Pavilion	86
Brighton Museum	62
Wheel	28
Sea Life Centre	27
Marina	23
Volks Railway	18
Art Gallery	14
Crazy golf	4
Sand sculptor	2
Boat trip	2
The Dome	1
Drusillas Park	1

2.4 Visitor Expenditure

This section of the report details the average expenditure of all visitor types to Brighton and Hove (per person, per 24 hours). Figures are broken down by category of spend – accommodation, eating out, shopping, entertainment (including admissions to attractions, sports, guided tours, etc) and travel (fares, parking charges, fuel, etc).

The sample sizes for both the special shopping trip and business/conference categories are low so please take this into consideration when viewing these figures.

2.4.1 Staying visitor expenditure

The average expenditure among staying visitors to Brighton & Hove (per person per 24 hours) on eating out, shopping, entertainment and travel was £52.20 (£39.70 in 2009). With the addition of accommodation, it came to approximately £130.98 (£125.56 in 2009).

Table 31: Average spend by staying visitors (£/per person/per 24 hrs)

Category of expenditure	All staying visitors 2014	All staying visitors 2009	Domestic visitors	Overseas visitors
Accommodation	£78.78	£85.86	£84.67	£66.82
Eating out	£24.51	£18.55	£27.32	£18.83
Shopping	£14.26	£14.71	£14.56	£13.65
Entertainment	£6.52	£3.14	£6.16	£7.26
Travel	£6.91	£3.30	£6.33	£8.07
Total Ave.	**£130.98**	**£125.56**	**£139.04**	**£114.63**

NB: Based on dividing total spend by total number of visitors and thus includes visitors who spent nothing.

The average spend on accommodation at £78.78 varied significantly according to the type of accommodation used during the stay, and although a relatively high proportion of visitors to Brighton & Hove in 2014 were staying in serviced accommodation, the use of the homes of friends and relatives will have resulted in a lowering of average spend per person per night.

The average expenditure between both domestic and overseas staying visitors varied, with domestic visitors spending an average of £139.04 per person per 24 hours (£115.51 in 2009) and £114.63 by overseas visitors (£181.77 in 2009). In the 2009 survey overseas visitors spent more on average compared with domestic visitors; this trend has been reversed in 2014. Domestic visitors spent more on accommodation, eating out and shopping than overseas visitors.

Results split by purpose of trip reveal that business visitors spent the most per night compared to other purposes listed in Table 32, overleaf.

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Table 32: Average spend of visitors staying in Brighton by main reason for visiting Brighton (£/per person/per 24 hrs)

Category of expenditure	Leisure/ Holiday		Visiting friends and relatives		Special shopping trip		Language student		Business/conference	
	2014	2009	**2014**	2009	**2014**	2009	**2014**	2009	**2014**	2009
Accommodation	**£90.50**	£98.02	**£17.92**	£27.48	**£66.67**	£11.00	**-**	£187.50	**£153.50**	£165.43
Eating out	**£26.35**	£19.56	**£18.18**	£19.63	**£26.67**	£10.00	**£5.38**	£7.17	**£12.50**	£17.86
Shopping	**£14.60**	£15.52	**£9.15**	£15.41	**£166.67**	£10.00	**£5.08**	£7.43	**£34.88**	£21.71
Entertainment	**£6.67**	£3.49	**£5.59**	£2.83	**-**	-	**£9.83**	£2.57	**£0.75**	£1.14
Travel	**£6.58**	£3.80	**£6.39**	£2.57	**£26.67**	-	**£18.13**	£1.77	**£5.25**	£3.29
Total Ave.	**£144.70**	£140.39	**£57.23**	£67.92	**£286.68**	£31.00	**£38.42**	£206.44	**£206.88**	£209.43

NB: Based on diving total spend by total number of visitors and thus includes visitors who spent nothing.

2.4.2 Day visitors on holiday expenditure

Day visitors on holiday spent significantly more overall in 2014 (£36.89) compared to the overall amount spent in 2009 (£20.76). Overseas visitors spent more money on average, with £47.36 per person per day (£21.10 in 2009) compared to £24.41 by domestic visitors (£20.60 in 2009).

Table 33: Average expenditure of day visitors on holiday (£/per person/per day)

Category of expenditure	All day visitors on holiday 2014	All day visitors on holiday 2009	Domestic visitors	Overseas visitors
Eating out	£15.59	£9.36	£11.69	£18.86
Shopping	£10.56	£7.16	£6.60	£13.88
Entertainment	£5.47	£2.11	£3.21	£7.36
Travel	£5.27	£2.13	£2.90	£7.25
Total Ave.	**£36.89**	**£20.76**	**£24.41**	**£47.36**

NB: Based on diving total spend by total number of visitors and thus includes visitors who spent nothing.

Results split by purpose of trip reveal that those visiting friends and relatives spent the most per night compared to other purposes listed in Table 34.

Table 34: Average spend of day visitors on holiday by main reason for visiting Brighton (£/per person/per 24 hrs)

Category of expenditure	Leisure/ Holiday		Visiting friends and relatives		Special shopping trip		Language student		Business/conference	
	2014	2009	**2014**	2009	**2014**	2009	**2014**	2009	**2014**	2009
Eating out	**£15.72**	£9.03	**£16.21**	£12.28	**-**	£6.00	**£7.50**	£3.33	**£17.33**	£9.33
Shopping	**£10.45**	£7.20	**£14.66**	£7.48	**-**	£17.67	**£7.50**	£3.67	**£2.33**	£0.00
Entertainment	**£5.65**	£2.16	**£4.72**	£2.28	**-**	£2.67	**£3.50**	£0.00	**-**	£0.00
Travel	**£5.29**	£1.65	**£6.72**	£4.24	**-**	£2.67	**£3.50**	£11.33	**-**	£1.33
Total Ave.	**£37.09**	£20.04	**£42.31**	£26.28	**-**	£29.00	**£22.00**	£18.33	**£19.67**	£10.67

NB: Based on diving total spend by total number of visitors and thus includes visitors who spent nothing.

2.4.3 Day visitors from home visitor expenditure

The average expenditure among day visitors from home (per person per 24 hours) on eating out, shopping, entertainment and travel in 2014 was £31.26 - £26.14 in 2009.

Table 35: Average expenditure of day visitors from home (£/per person/per day)

Category of expenditure	All day visitors from home 2014	All day visitors from home 2009
Eating out	£12.92	£11.38
Shopping	£10.03	£9.94
Entertainment	£3.16	£1.46
Travel	£5.15	£3.36
Total Ave.	**£31.26**	**£26.14**

NB: Based on diving total spend by total number of visitors and thus includes visitors who spent nothing.

Results split by purpose of trip reveal that visitors on a special shopping trip language spent the most per day compared to other purposes listed in Table 36.

Table 36: Average spend of day visitors from home by main reason for visiting Brighton (£/per person/per 24 hrs)

Category of expenditure	Leisure/ Holiday		Visiting friends and relatives		Special shopping trip		Language student		Business/conference	
	2014	2009	**2014**	2009	**2014**	2009	**2014**	2009	**2014**	2009
Eating out	**£12.56**	£11.52	**£16.22**	£14.89	**£14.85**	£10.38	**£6.13**	£2.50	**£9.50**	£5.55
Shopping	**£7.22**	£6.56	**£16.45**	£6.84	**£42.19**	£45.26	**£3.38**	£2.50	**£8.50**	£0.91
Entertainment	**£3.09**	£1.67	**£4.49**	£1.46	**-**	£0.36	**£3.13**	£0.00	**£0.40**	£0.55
Travel	**£5.04**	£3.34	**£5.89**	£2.62	**£6.58**	£2.90	**£6.00**	£4.00	**£6.80**	£8.36
Total Ave.	**£27.92**	£23.09	**£43.05**	£25.81	**£63.62**	£48.52	**£18.63**	£9.00	**£25.20**	£15.36

NB: Based on diving total spend by total number of visitors and thus includes visitors who spent nothing.

2.5 Visitor Opinions

The survey sought to obtain the opinions of visitors to Brighton and Hove on a range of indicators which together comprise the 'visitor experience'. Each indicator was rated on a scale of one to ten, where 1='very poor' (or the most negative response) and 10='very good' (or the most positive response', allowing satisfaction scores (out of 10) to be calculated.

2.5.1 Accommodation

Staying visitors who were using commercial accommodation in Brighton and Hove were asked to rate their accommodation in terms of quality of service and value for money.

Out of a score of 1-10 with 10 representing 'totally satisfied', the mean average score on quality of commercial accommodation was 7.94, higher than the average score of 7.65 achieved in 2009.

At 7.88, the mean average score on value for money was also higher than the average given in 2009 (7.55).

Table 37: Rating on accommodation

	1	2	3	4	5	6	7	8	9	10	Mean 2014	Mean 2009
Quality of commercial accommodation	1%	-	<1%	1%	4%	6%	20%	35%	17%	16%	**7.94**	7.65
Value for money of commercial accommodation	1%	-	1%	1%	2%	5%	23%	35%	15%	16%	**7.88**	7.55

Results split by domestic and overseas visitors reveal that domestic visitors in 2014 provided a higher average mean score on both quality and value for money (8.04 and 7.98 respectively) than in 2009. Overseas visitors also provided higher mean scores than 2009 on both key indicators, and once again the quality of commercial accommodation (7.70) was rated higher than the value for money (7.51).

Table 38: Rating on accommodation by domestic/overseas

	Domestic visitors 2014	Domestic visitors 2009	Overseas visitors 2014	Overseas visitors 2009
Quality of commercial accommodation	**8.04**	7.80	**7.70**	7.22
Value for money of commercial accommodation	**7.98**	7.80	**7.51**	6.70

2.5.2 *Visitor satisfaction ratings*

Visitors were asked to express their opinions on the wide range of factors or indicators which together comprise the 'visitor experience'. The average score results indicate a generally good level of satisfaction with most attributes measured receiving scores of 7 plus. Some factors were not asked in 2009, so there are no comparable scores.

Table 39: Satisfaction scores – all visitors

	1	2	3	4	5	6	7	8	9	10	Mean 2014	Mean 2009
Ease of getting here	1%	<1%	<1%	<1%	1%	2%	5%	21%	26%	43%	**8.90**	8.52
Ease of parking	8%	5%	4%	4%	6%	7%	9%	18%	14%	26%	**7.08**	5.53
Value for money of parking	19%	9%	12%	9%	11%	9%	4%	6%	5%	17%	**5.07**	4.56
Quality and value for money of accommodation	1%	<1%	1%	<1%	5%	4%	12%	28%	26%	23%	**8.19**	-
Overall impression of Brighton and Hove in terms of feeling of welcome	-	-	-	1%	2%	3%	7%	26%	36%	25%	**8.64**	8.60
Welcome by City Champions	<1%	-	<1%	<1%	2%	3%	10%	36%	37%	10%	**8.29**	-
Visitor Information Points - Quality of service	1%	-	1%	<1%	2%	4%	9%	32%	39%	13%	**8.32**	8.26
Visitor Information Centre - Ease of finding locations	1%	-	1%	1%	1%	4%	13%	30%	36%	14%	**8.29**	-
Transport in the City –Buses	-	-	-	1%	2%	1%	9%	26%	29%	31%	**8.70**	-
Transport in the City –Cycle routes	-	2%	2%	-	2%	4%	11%	30%	37%	14%	**8.23**	-
Transport in the City - Taxi's and their drivers	-	1%	-	-	2%	2%	9%	30%	36%	19%	**8.51**	7.98
Transport in the City – Rail	-	-	<1%	-	<1%	1%	4%	24%	37%	34%	**8.95**	8.38
Ease of finding way around	-	-	<1%	<1%	2%	2%	7%	25%	29%	35%	**8.82**	8.09
Quality of visitor attractions & other places to visit	-	-	<1%	<1%	2%	2%	10%	29%	34%	24%	**8.62**	7.93
Value for money of visitor attractions & other places to visit	<1%	<1%	<1%	1%	3%	5%	20%	33%	22%	14%	**8.01**	7.33
Quality of places to eat & drink	<1%	-	<1%	1%	2%	3%	10%	33%	26%	24%	**8.47**	8.21
Value for money of places to eat & drink	<1%	<1%	<1%	1%	3%	6%	16%	35%	23%	14%	**8.03**	7.77
Quality of the shopping	-	-	-	<1%	1%	4%	10%	30%	30%	25%	**8.58**	8.34
Cleanliness and availability of public toilets	2%	1%	2%	5%	8%	17%	20%	22%	15%	8%	**7.03**	-
Cleanliness of streets	1%	<1%	1%	3%	8%	10%	20%	32%	16%	9%	**7.50**	7.38
Upkeep of parks/open spaces/seafront	<1%	<1%	<1%	1%	4%	7%	19%	33%	23%	12%	**7.91**	8.03
Quality of beach/seafront	<1%	<1%	<1%	1%	3%	4%	13%	30%	31%	17%	**8.26**	7.82
City heritage	-	<1%	<1%	1%	<1%	2%	8%	28%	35%	26%	**8.69**	-
Vibrant cosmopolitan atmosphere	-	-	-	<1%	1%	1%	8%	26%	29%	35%	**8.83**	-
Feeling safe and secure in the City	-	<1%	<1%	<1%	1%	3%	8%	29%	34%	25%	**8.63**	-
Choice of nightlife/evening entertainment	-	<1%	<1%	<1%	<1%	2%	6%	26%	32%	32%	**8.81**	8.23
Ease of driving around the City	3%	2%	3%	3%	7%	11%	17%	21%	17%	16%	**7.30**	-
Lively gay scene	2%	<1%	<1%	<1%	3%	4%	5%	21%	20%	45%	**8.72**	-

Table 39, on previous page, shows that all attributes of visitors' satisfaction were exceeded in 2014. Only one out of the seventeen indicators that were comparable with 2009 was rated lower – 'Upkeep of parks/open spaces/seafront' (7.91 in 2014 and 8.03 in 2009).

The highest average score of 8.95 was given to 'Transport in the City – Rail' (8.38 in 2009). 'Ease of getting here', 'Buses', Ease of finding way around' 'Vibrant cosmopolitan atmosphere', 'Choice of nightlife/evening entertainment', and 'Lively gay scene' also received high average scores.

Table 40: Satisfaction scores – by type of visitor

	Day visitors from home 2014	Day visitors from home 2009	Day visitor on holiday 2014	Day visitor on holiday 2009	Staying visitors 2014	Staying visitors 2009
Ease of getting here	**8.91**	8.72	**9.05**	8.39	**8.81**	8.36
Ease of parking	**7.23**	5.76	**7.75**	5.75	**6.53**	5.18
Value for money of parking	**4.79**	4.73	**5.13**	4.47	**5.40**	4.41
Quality and value for money of accommodation	**8.79**	-	**8.52**	-	**8.11**	-
Overall impression of Brighton and Hove in terms of feeling of welcome	**8.59**	8.53	**8.55**	8.56	**8.74**	8.68
Welcome by City Champions	**8.01**	-	**8.62**	-	**8.37**	-
Visitor Information Centre - Quality of service	**8.30**	8.21	**8.40**	8.29	**8.31**	8.29
Visitor Information Centre - Ease of finding locations	**8.32**	-	**8.32**	-	**8.25**	-
Transport in the City - Buses	**8.44**	-	**8.90**	-	**8.81**	-
Transport in the City – Cycle routes	**8.14**	-	**8.33**	-	**8.25**	-
Transport in the City - Taxi's and their drivers	**8.03**	7.92	**8.46**	8.27	**8.71**	7.98
Transport in the City - Rail	**8.86**	8.38	**9.18**	8.83	**8.92**	8.25
Ease of finding way around	**8.91**	8.11	**8.76**	7.82	**8.73**	8.19
Quality of visitor attractions & other places to visit	**8.60**	7.84	**8.75**	8.12	**8.57**	7.94
Value for money of visitor attractions/places to visit	**7.85**	7.25	**7.17**	7.68	**8.10**	7.26
Quality of places to eat & drink	**8.44**	8.11	**8.43**	8.12	**8.53**	8.34
Value for money of places to eat & drink	**8.01**	7.71	**8.01**	7.82	**8.07**	7.82
Quality of the shopping	**8.54**	8.26	**8.59**	8.39	**8.61**	8.41
Cleanliness and availability of public toilets	**6.83**	-	**7.17**	-	**7.19**	-
Cleanliness of streets	**7.57**	7.24	**7.64**	7.39	**7.36**	7.52
Upkeep of parks/open spaces/seafront	**7.91**	7.99	**7.95**	7.87	**7.88**	8.14
Quality of beach/seafront	**8.21**	7.76	**8.34**	7.82	**8.28**	7.88
City heritage	**8.72**	-	**8.75**	-	**8.62**	-
Vibrant cosmopolitan atmosphere	**8.78**	-	**8.72**	-	**8.93**	-
Feeling safe and secure in the City	**8.67**	-	**8.60**	-	**8.61**	-
Choice of nightlife/evening entertainment	**8.73**	8.20	**9.16**	8.17	**8.76**	8.27
Ease of driving around the City	**7.06**	-	**7.68**	-	**7.41**	-
Lively gay scene	**8.69**	-	**8.85**	-	**8.71**	-

Overall, day visitors on holiday appear more satisfied with their visit to Brighton and Hove compared to both day visitor from home and staying visitor groups. In all, day visitors on holiday rated 16 of the key indicators higher when compared with day visitors from home (4 key indicators) and staying visitors (9 key indicators). However, both of the day visitor groups provided the same high average mean score for both 'Visitor Information Centre – Ease of finding location' (8.32).

Day visitors on holiday gave 'Welcome by City Champions' an average score of 8.62 compared to an average score of 8.01 and 8.37 for day visitors from home and staying visitors respectively.

Table 41: Satisfaction scores – by type of visitor

	Domestic visitors 2014	Domestic visitors 2009	Overseas visitors 2014	Overseas visitors 2009
Ease of getting here	**8.83**	8.53	**9.12**	8.44
Ease of parking	**7.09**	5.49	**7.04**	5.87
Value for money of parking	**5.00**	4.48	**5.53**	5.24
Quality and value for money of accommodation	**8.19**	-	**8.19**	-
Overall impression of Brighton and Hove in terms of feeling of welcome	**8.60**	8.59	**8.77**	8.63
Welcome by City Champions	**8.24**	-	**8.40**	-
Visitor Information Centre - Quality of service	**8.28**	8.38	**8.40**	7.97
Visitor Information Centre - Ease of finding locations	**8.30**	7.74	**8.26**	8.06
Transport in the City - Buses	**8.66**	-	**8.78**	-
Transport in the City – Cycle routes	**8.15**	-	**8.39**	-
Transport in the City - Taxi's and their drivers	**8.43**	7.91	**8.67**	8.25
Transport in the City - Rail	**8.89**	8.39	**9.06**	8.37
Ease of finding way around	**8.80**	8.06	**8.88**	8.22
Quality of visitor attractions & other places to visit	**8.57**	7.91	**8.76**	8.03
Value for money of visitor attractions/places to visit	**7.97**	7.36	**8.12**	7.18
Quality of places to eat & drink	**8.51**	8.27	**8.34**	7.91
Value for money of places to eat & drink	**8.07**	7.81	**7.92**	7.59
Quality of the shopping	**8.60**	8.34	**8.51**	8.37
Cleanliness and availability of public toilets	**7.01**	-	**7.09**	-
Cleanliness of streets	**7.56**	7.37	**7.32**	7.40
Upkeep of parks/open spaces/seafront	**7.98**	8.07	**7.69**	7.85
Quality of beach/seafront	**8.25**	7.85	**7.29**	7.68
City heritage	**8.67**	-	**8.74**	-
Vibrant cosmopolitan atmosphere	**8.81**	-	**8.89**	-
Feeling safe and secure in the City	**8.61**	-	**8.73**	-
Choice of nightlife/evening entertainment	**8.77**	8.24	**8.89**	8.19
Ease of driving around the City	**7.14**	-	**7.97**	-
Lively gay scene	**8.78**	-	**8.46**	-

As shown in Table 41, on previous page, overseas visitors appear slightly more satisfied with their visit to Brighton and Hove compared to domestic visitors, with overseas visitors rating 19 of the key indicators higher compared 6 for domestic visitors.

Overseas and domestic visitors were both more likely to indicate that ‘Ease of getting here’, ‘Transport in the City – Rail’, ‘Ease of finding way around’, ‘City heritage’, ‘Vibrant cosmopolitan atmosphere’, and ‘Choice of nightlife/evening entertainment’ had exceeded their expectations.

2.5.3 Overall rating of the Brighton & Hove offer

All visitors were asked to rate the overall enjoyment of their visit to Brighton and Hove, the likelihood of them recommending Brighton and Hove to others and their likelihood of returning for a day trip/short stay.

With an average score of 8.76, visitor’s overall enjoyment of their trip to Brighton & Hove was high. This aspect scored 8.45 in 2009. With nearly 9 out of 10 people likely to recommend the city to friends and relatives (8.96) and return themselves (8.89), the rate of referral and repeat visits was also very high.

Visitors were also asked to provide an overall rating of what is on offer in Brighton and Hove in comparison to other places they have been to in the UK. Here, the average mean score was a little lower than the scores provided to the other three areas discussed above at 8.11, but was higher than the mean score achieved in 2009 (7.66).

Table 42: Overall rating score

	1	2	3	4	5	6	7	8	9	10	Mean 2014	Mean 2009
How would you rate the overall enjoyment of your visit to Brighton & Hove?	<1%	-	-	<1%	1%	2%	8%	28%	28%	32%	**8.76**	8.45
How likely are you to recommend Brighton & Hove to others?	<1%	<1%	<1%	<1%	2%	1%	6%	21%	285	41%	**8.96**	8.78
How likely are you to return to Brighton & Hove for a day trip/short stay?	1%	1%	1%	1%	3%	2%	6%	18%	21%	47%	**8.89**	8.60
Overall, how would you rate what is on offer in Brighton & Hove compared to other places visited in the UK	<1%	<1%	1%	1%	7%	6%	14%	27%	24%	20%	**8.11**	7.66

When broken down in to visitor type it appears that staying visitors (8.83) tended to enjoy their visit more overall compared to both day visitors from home (8.74) and day visitors on holiday (8.58). This reason may be behind staying visitors also appear more likely to recommend Brighton and Hove to others and providing a higher average mean score when rating what is on offer in Brighton and Hove compared to other places visited in the UK.

It should come as no surprise that day visitors from home are more likely to return for a day trip/short stay due to their proximity to the city. However, staying visitors appear far more likely to return compared to day visitors from holiday indicating that the experience of staying in the City may have had an impact.

Table 43: Overall rating score by visitor type

	Day visitors from home 2014	Day visitors from home 2009	Day visitors on holiday 2014	Day visitors on holiday 2009	Staying visitors 2014	Staying visitors 2009
How would you rate the overall enjoyment of your visit to Brighton & Hove?	**8.74**	8.37	**8.58**	8.30	**8.83**	8.59
How likely are you to recommend Brighton & Hove to others?	**9.00**	8.74	**8.52**	8.55	**9.01**	8.92
How likely are you to return to Brighton & Hove for a day trip/short stay?	**9.08**	8.95	**8.10**	7.71	**8.67**	8.64
Overall, how would you rate what is on offer in Brighton & Hove compared to other places visited in the UK	**8.12**	7.68	**7.67**	7.26	**8.21**	7.81

Domestic visitors appear to have enjoyed their visit to Brighton and Hove slightly more than overseas visitors which, as Table 44 indicates, has resulted in a higher mean score for likely to recommend and return.

Table 44: Overall rating score by visitor type

	Domestic Visitors 2014	Domestic Visitors 2009	Overseas visitors 2014	Overseas visitors 2009
How would you rate the overall enjoyment of your visit to Brighton & Hove?	**8.76**	8.46	**8.70**	8.36
How likely are you to recommend Brighton & Hove to others?	**8.96**	8.78	**8.79**	8.74
How likely are you to return to Brighton & Hove for a day trip/short stay?	**8.89**	8.79	**8.25**	7.70
Overall, how would you rate what is on offer in Brighton & Hove compared to other places visited in the UK	**8.11**	7.66	**7.91**	7.66

2.5.4 Are you visiting Brighton and Hove with/for?

When asked who they were visiting Brighton and Hove with/for, the largest proportion of visitors indicated that they were visiting with a partner (35%), followed closely by with family (32%).Overall, 85% of all visitors to Brighton and Hove were visiting with at least one other person while 15% were on their own.

Table 58: Are you visiting Brighton and Hove with/for?

	All visitors 2014		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
On your own	142	15%	17%	5%	17%	14%	19%
A partner	329	35%	29%	35%	40%	36%	30%
Your family	301	32%	34%	34%	28%	33%	29%
Your friends	197	21%	21%	24%	19%	19%	26%
Organised group	35	4%	4%	8%	2%	3%	5%
Hen/Stag group	3	<1%	-	-	1%	<1%	-

N.B. Multiple responses permitted

Appendix 1 – Brighton and Hove Visitor Survey 2014 Questionnaire

BRIGHTON & HOVE VISITOR SURVEY 2014

Date: / /14 **Time:** .... **Interviewer initials:** ....

Interview location: Train Station ❑1 North Laine ❑2 Coach Station ❑3 New Road (including Pavilion and area outside TIC) ❑4 East Street and Lanes) ❑5 Brighton Marina❑6 Beach ❑7 Madeira Drive ❑8 Churchill Shopping Centre❑9 Electric Railway❑10 Western Road/Palmeira Square❑11

Refusal/Closures: 1 2 3 4 5 6 7 8 9 10 11 12

Good morning/afternoon, I'm .... from the regional tourist board (Tourism South East). We are conducting a survey of visitors to Brighton and Hove on behalf of the local authority tourism service VisitBrighton. It should take no more than 10-15 minutes. Would you be willing to take part?

FILTER QUESTIONS:

A. Do you live in Brighton/Hove

Yes 1 *(Thank & Close)*
No 2 *(Continue)*
Keep tally of closed interviews ....

B. How close to the end of your visit are you?

Just going	1	*(Continue)*
Staying a while longer	2	*(Continue)*
About half way through	3	*(Continue)*
Just arrived	4	*(Thank & Close)*

Keep tally of closed interviews ....

C. What is your MAIN reason for visiting Brighton/Hove?
(SHOWCARD 1 - one response only)

Leisure/holiday	1	*(Go to Q1a)*
Visiting friends or relatives	2	*(Go to Q1a)*
Special shopping trip (non-reg)	3	*(Go to Q1a)*
Language student	4	*(Go to Q1a)*
Business/conference visit	5	*(Go to Q1a)*
Shopping trip (household/ regular shopping)	6	*(Thank & Close)*
Work/study here	7	*(Thank & Close)*
Other e.g. house-hunting *(specify)*	8	*(Go to Q1a)*

....

Keep tally of closed interviews ....

ALL VISITORS ELIGIBLE FOR INTERVIEW:

1a. Where do you live?
(SHOWCARD 2)

London	1 *(Go to Q2a)*	North West	8 *(Go to Q2a)*
South East	2 *(Go to Q2a)*	Yorkshire	9 *(Go to Q2a)*
South	3 *(Go to Q2a)*	North East	10 *(Go to Q2a)*
South West	4 *(Go to Q2a)*	Wales	11 *(Go to Q2a)*
East Anglia	5 *(Go to Q2a)*	Scotland	12 *(Go to Q2a)*
East Midlands	6 *(Go to Q2a)*	Northern Ireland	13 *(Go to Q2a)*
West Midlands	7 *(Go to Q2a)*	Outside UK	14 *(Go to Q1b)*

1b. Country of residence *(Name of country)*

Belgium	1 *(Go to Q2a)*	Spain	7 *(Go to Q2a)*
France	2 *(Go to Q2a)*	Scandinavia	8 *(Go to Q2a)*
Germany	3 *(Go to Q2a)*	US	9 *(Go to Q2a)*
Italy	4 *(Go to Q2a)*	Canada	10 *(Go to Q2a)*
Netherlands	5 *(Go to Q2a*	Australasia	11 *(Go to Q2a)*
R.O.I	6 *(Go to Q2a)*	China	12 *(Go to Q2a)*
		Russia	13*(Go to Q2a)*
		Other *(specify below)*	14

....

2a. Have you come from there today?

Yes 1 No 2

2b. Are you returning there today?

Yes 1 No 2

If 'YES' to both Q2a & 2b, Go to Q6a otherwise continue onto Q3

3. Where are you staying?

Brighton/Hove	1 *(Go to Q4)*
Elsewhere in East Sussex	2 *(Go to Q6a)*
West Sussex	3 *(Go to Q6a)*
London	4 *(Go to Q6a)*
Elsewhere *(specify below)*	5 *(Go to Q6a)*

....

4. How many nights are you spending in total in Brighton/Hove?

1 night	1	8-14 nights	4
2-3 nights	2	Over 14 nights	5
4-7 nights	3		

5a. What sort of accommodation are you staying in?

Hotel	1 *(Go to Q5b)*
B&B/Guest House	2 *(Go to Q5b)*
Pub/Inn	3 *(Go to Q5b)*
Holiday home/Timeshare	4 *(Go to Q5d)*
Self-catering (Holiday Complex/Village)	5 *(Go to Q5d)*
Self-catering (Cottage/Apartments)	6 *(Go to Q5d)*
Caravan/Camping	7 *(Go to Q5d)*
Youth Hotel	8 *(Go to Q5d)*
Boat/yacht	9 *(Go to Q5d)*
Language school	10 *(Go to Q5d)*
Home of friend/relative	11 *(Go to Q5j)*
University accommodation	12 *(Go to Q5d)*
Other *(specify below)*	13 *(Go to Q5d)*

....

5b. Could you tell me the total cost of your accommodation (including meals) for the whole period you and your group are staying there? (to the nearest pound)

£.............. *(NB: Put "0" if spent/expect to spend nothing)*
Tick box if Don't know/Can't recall/Declined to say ☐

How does the accommodation compare to your expectations of a good place to visit for each of the following aspects?
(SHOWCARD 3 – circle one response for each row)

5c. Quality of commercial visitor accommodation
Totally unsatisfied ------------|------------ Totally satisfied
1 2 3 4 5 6 7 8 9 10 Can't say

5d. Value for money of commercial visitor accommodation
Totally unsatisfied ------------|------------ Totally satisfied
1 2 3 4 5 6 7 8 9 10 Can't say

5e. What sources did you use to choose your accommodation?

Online (including user review sites) *Please specify site(s)*	1
Visitor Information Centre	2
Brochure	3
Recommendation from others	4
Other *(specify below)*	5

....

5f. How did you book your accommodation?

Online *Please specify website*	1
Direct	2
Visitor Information Centre	3
Other *(specify below)*	4

....

5g. How many overnight trips do you make each year?

[ ] Trips

ALL VISITORS:

6a. When did you decide to make your trip to Brighton/Hove?

....

6b. Can you remember what was the initial 'trigger' for thinking about visiting Brighton/Hove?

....

....

7. How many hours are you spending in total in Brighton/Hove?

1-2 hours	1
3-4 hours	2
5-6 hours	3
Over 6 hours	4

8. Is this your first ever visit to Brighton/Hove?

Yes	1	*(Go to Q10)*
No	2	*(Go to Q9)*

9. How many times have you visited Brighton/Hove before on a DAY TRIP (last 12 months) and/or STAYING VISIT (last 3 years)?
(Please record a response for each column)

	Day visit	Staying visit
Once before	1	1
2 or 3 times before	2	2
4 to 10 times before	3	3
More often	4	4
None	5	5
Don't know	6	6

10. What was the MAIN form of transport you used to reach Brighton/Hove? *(ONE response only)*

Car/van/motorcycle	1
Motorhome	2
Bus/coach service	3
Coach tour	4
Train	5
Private yacht/boat	6
Bicycle	7
Walked/on foot	8
Wheelchair	9
Mobility scooter	10
Taxi	11
Other *(specify below)*	12

....

11. Did any of the following sources of information influence you to come to Brighton/Hove?
(SHOWCARD 4 – circle all that apply)

Leaflets/brochures	1
Posters	2
Newspaper/magazine adverts	3
Newspaper article / magazine feature	4
Time Out Guide	5
Radio advert	6
Radio programme	7
TV advert	8
TV programme	9
Website or web advertisement	10
Travel agent	11
Visitor information centre	12
Family/friends/colleagues	13
USED NO INFORMATION PRIOR TO TRIP	14
Other *(specify below)*	15

....

12. What leisure activities are you (and your group) planning to pursue/have already undertaken during your holiday/visit?
(SHOWCARD 5 – circle all that apply)

Visit a pub/club	1
Going to a restaurant or place to eat out	2
Just walking around	3
Walking/Cycling *in surrounding countryside*	4
Going to an event *(specify below)*	5
Going on organised trip/tour	6
Shopping	7
Going to see a film/show/gig/theatre	8
Relaxing/enjoying view/picnicking etc	9
Visiting a tourist attraction (e.g. museum, art gallery, historic building, pier) *(specify below)*	10
Visiting the beach and seafront	11
Pursuing a hobby/special interest.	12
Pursuing a water sport/interest	13
Viewing architecture	14
Other *(specify below)*	15

....

13. **What transport have you (and your group) used whilst in Brighton?**
(SHOWCARD 6 – circle all that apply)

Foot	1
Bicycle	2
Bus	3
Train	4
Taxi	5
Car	6
Wheelchair	7
Mobility scooter	8
Other *(specify below)*	9

....

14. **Did you navigate your way round the City using:**

VisitBrighton's paper map	1
BHCC's Cycle paper map	2
On-street pedestrian way finding signs?	3
VisitBrighton App	4
Other (please state)	5

15. **Thinking of today as a whole, how much do you estimate that you and your immediate party will have spent today and this evening in total in Brighton/Hove on the following:**
Put "0" if spent/expect to spend nothing

a) **Eating & drinking** £...............
(in cafes, restaurants, pubs, hotels etc)
Tick box if Don't know/Can't recall/Declined to say ☐

b) **Shopping** £...............
(souvenirs, guidebooks, clothes, sweets, drinks, food, other)
Tick box if Don't know/Can't recall/Declined to say ☐

c) **Entertainment** £...............
(inc. admission to attractions, cinema/theatre, tours etc)
Tick box if Don't know/Can't recall/Declined to say ☐

d) **Travel & transport in Brighton/Hove** £...............
(inc. fuel, fares, car parking charges etc)
Tick box if Don't know/Can't recall/Declined to say ☐

15a. How many people do these amounts cover

☐ People

16. **We are interested in your opinions on various aspects of Brighton/Hove. On the following scale how would you rate the following:** *(SHOWCARD 8 – circle one response for each row)*

	Totally unsatisfied	---------------	---------------	---------------	---------------	---------------	---------------	---------------	Totally	satisfied	
1 - Ease of getting here	1	2	3	4	5	6	7	8	9	10	Can't say
2 - Ease of parking	1	2	3	4	5	6	7	8	9	10	Can't say
3 - Value for money of parking	1	2	3	4	5	6	7	8	9	10	Can't say
4 – Quality and value for money of accommodation	1	2	3	4	5	6	7	8	9	10	Can't say
5 - Overall impression of Brighton/Hove in terms of feeling of welcome	1	2	3	4	5	6	7	8	9	10	Can't say
6 – Welcome by City Champions	1	2	3	4	5	6	7	8	9	10	Can't say
7 - Visitor Information Points - Quality of service	1	2	3	4	5	6	7	8	9	10	Can't say
8 - Visitor information Points – Ease of finding locations	1	2	3	4	5	6	7	8	9	10	Can't say
9 – Transport in the City - buses	1	2	3	4	5	6	7	8	9	10	Can't say
10 – Transport in the City - cycle routes	1	2	3	4	5	6	7	8	9	10	Can't say
11 - Transport in the City - taxi's and their drivers	1	2	3	4	5	6	7	8	9	10	Can't say
12 - Transport in the City - rail	1	2	3	4	5	6	7	8	9	10	Can't say
13 - Ease of finding way around	1	2	3	4	5	6	7	8	9	10	Can't say
14 - Quality of visitor attractions & other places to visit	1	2	3	4	5	6	7	8	9	10	Can't say
15 - Value for money of visitor attractions & other places to visit	1	2	3	4	5	6	7	8	9	10	Can't say
16 - Quality of places to eat & drink	1	2	3	4	5	6	7	8	9	10	Can't say
17 - Value for money of places to eat & drink	1	2	3	4	5	6	7	8	9	10	Can't say
18 - Quality of the shopping	1	2	3	4	5	6	7	8	9	10	Can't say
19 – Cleanliness and availability of public toilets	1	2	3	4	5	6	7	8	9	10	Can't say
20 - Cleanliness of streets	1	2	3	4	5	6	7	8	9	10	Can't say
21 - Upkeep of parks and open spaces	1	2	3	4	5	6	7	8	9	10	Can't say
22 - Quality of beach and seafront	1	2	3	4	5	6	7	8	9	10	Can't say
23 – City heritage	1	2	3	4	5	6	7	8	9	10	Can't say
24 – Lively gay scene	1	2	3	4	5	6	7	8	9	10	Can't say
25 – Vibrant cosmopolitan atmosphere	1	2	3	4	5	6	7	8	9	10	Can't say
26 – Feeling safe and secure in the City	1	2	3	4	5	6	7	8	9	10	Can't say
27 - Choice of nightlife/ evening entertainment	1	2	3	4	5	6	7	8	9	10	Can't say
28. Ease of driving around the City	1	2	3	4	5	6	7	8	9	10	Can't say

17. How would you rate the overall enjoyment of your visit to Brighton/Hove? *(SHOWCARD 3 – circle one response for each row)*

Totally unsatisfied ------------|------------ Totally satisfied
1 2 3 4 5 6 7 8 9 10 Can't say

18. How likely are you to recommend Brighton/Hove to others? *(SHOWCARD 9 - circle one response for each row)*

Highly unlikely ----------------|---------------- Highly likely
1 2 3 4 5 6 7 8 9 10 Can't say

19. How likely are you to return to Brighton/Hove for a day trip/short stay? *(SHOWCARD 9 - circle one response for each row)*

Highly unlikely ----------------|---------------- Highly likely
1 2 3 4 5 6 7 8 9 10 Can't say

20. Overall how would you rate **what is on offer** in Brighton/Hove **compared to other places you have visited in the UK** on a scale of 1-10? Where 1 is the 'much worse than anywhere else, 10 is 'much better than any where else' and 5 is 'the same as most other places
(SHOWCARD 9 - circle one response for each row)

Much worse ----------------|---------------- Much better
1 2 3 4 5 6 7 8 9 10 Can't say

Finally, I just have a few questions about you and your immediate group

21. Are you visiting Brighton/Hove with/for?

On your own	1
A partner	2
Your family	3
Your friends	4
Organised group	5
Hen/Stag group	6

22. Including yourself, how many people in your immediate party are male and female, and which of these age groups do they fall into? *(SHOWCARD 10)*

	Age	Male	Female
A	0-17		
B	18-24		
C	25-34		
D	35-44		
E	45-54		
F	55-64		
G	65-74		
H	75+		

Refused -1

23. What is or was the principal occupation of the main income earner in your household in terms:

Industry/type of company

....

Position/job title *(state previous job if retired)*

....

Grade/Level

....

Refused -1

24. What is your postcode? (UK residents only)

....

25. Could I have your name and home telephone number? *(for the purpose of random back-checking of questionnaires)*

Name of respondent ....

Tel. Number/E-mail ....

26. Would you like us to use this email address to receive VisitBrighton's e-newsletter and details of special offers in the future?

....

Refused -

27. Finally, would you please complete the attached Equalities Monitoring.
Please advise the interviewer that they can answer only those questions with which they feel comfortable.

Appendix 2 – Full list of responses for initial 'trigger' for thinking about visiting Brighton and Hove

	All visitors 2009		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Friends	107	10%	8%	7%	13%	8%	15%
To see family	101	9%	5%	5%	16%	9%	11%
Previous visit & enjoyed it	96	9%	5%	11%	11%	9%	6%
Beach	95	9%	10%	10%	7%	8%	12%
Day out/ short break	78	7%	8%	8%	6%	8%	5%
Shopping	67	6%	12%	3%	1%	7%	2%
Good weather	61	5%	11%	2%	1%	6%	2%
Curiosity - Never Been before	44	4%	3%	5%	5%	4%	3%
Organised coach visit	41	4%	5%	8%	-	4%	-
Great city to visit	30	3%	3%	2%	2%	3%	2%
Celebration (Anniversary/Birthday)	28	3%	3%	1%	3%	3%	1%
Working/Business	26	2%	3%	1%	2%	2%	4%
Recommendation	22	2%	1%	1%	3%	1%	5%
Frequent visitor (favourite place)	21	2%	2%	1%	2%	2%	1%
Visiting various coastal towns along the south coast	20	2%	1%	4%	2%	2%	3%
Pavillion	15	1%	<1%	6%	<1%	1%	2%
Near London	15	1%	2%	<1%	2%	1%	2%
Close to home	15	1%	3%	<1%	<1%	2%	-
Pier	13	1%	<1%	5%	<1%	1%	3%
Gay pride	13	1%	<1%	-	2%	1%	1%
Always wanted to visit	11	1%	<1%	2%	1%	1%	1%
Somewhere different	10	1%	1%	1%	<1%	1%	-
Wedding	10	1%	<1%	-	2%	1%	1%
Studying	9	1%	<1%	<1%	2%	<1%	3%
Not visited for a while	9	1%	1%	-	1%	1%	1%
So much to offer/plenty to do	9	1%	1%	<1%	1%	1%	1%
Sea Life Centre	9	1%	1%	1%	-	1%	1%
Student trip	7	1%	<1%	1%	<1%	<1%	3%
Last minute get away	7	1%	1%	<1%	1%	1%	1%
Graduation	6	1%	<1%	<1%	1%	1%	1%
Atmoshpere of Brighton	6	1%	<1%	<1%	1%	<1%	1%
Convenient place to visit	6	1%	<1%	1%	<1%	1%	1%
History of Brighton	5	<1%	<1%	1%	<1%	<1%	2%
Travel Brochure/Guide	5	<1%	-	1%	<1%	<1%	2%
Good place to get together	4	<1%	1%	-	-	<1%	-
Hospital appointment	4	<1%	1%	-	-	<1%	-
Cheap accommodation	4	<1%	-	-	1%	<1%	1%
Bridge tournament	4	<1%	-	-	1%	<1%	-
Exhibition at museum	4	<1%	<1%	-	<1%	<1%	-
Viewing properties	3	<1%	-	<1%	<1%	<1%	-
Sightseeing various attractions	3	<1%	<1%	<1%	-	<1%	-
To try new bus/train service	3	<1%	<1%	-	<1%	<1%	-
Visiting the opera/theatre	3	<1%	<1%	-	<1%	<1%	1%

Goodwood racing	3	<1%	<1%	<1%	-	<1%	-
Ad in a newspaper	3	<1%	<1%	<1%	<1%	<1%	1%
Looking to study in Brighton so visiting the area to see what it's like	3	<1%	-	<1%	<1%	<1%	1%
The Lanes	3	<1%	<1%	1%	-	<1%	-
Staying in holiday home	3	<1%	-	-	1%	<1%	-
Job interview	2	<1%	<1%	-	<1%	<1%	1%
Boat needed mooring for some maintenance	2	<1%	-	-	<1%	<1%	1%
Visit toy museum	2	<1%	<1%	-	<1%	<1%	-
Saw Brighton on a TV programme	2	<1%	-	<1%	<1%	-	1%
Planning for convention	2	<1%	<1%	-	-	<1%	-
To look at English Culture	2	<1%	-	-	<1%	-	1%
Music/Entertainment	2	<1%	<1%	-	<1%	<1%	-
Twenty20 cricket match	2	<1%	-	-	<1%	<1%	-
Won a free ticket in a competition	2	<1%	<1%	-	<1%	<1%	-
University open day	2	<1%	<1%	-	<1%	<1%	1%
Cheap place to visit	2	<1%	-	<1%	<1%	<1%	1%
Free bus pass	2	<1%	<1%	-	-	<1%	-
Watching troops band in Pavillion gardens	2	<1%	<1%	<1%	-	<1%	-
Part of holiday package	2	<1%	-	1%	-	<1%	-
Singing in a choir	1	<1%	<1%	-	-	<1%	-
Look at new bandstand	1	<1%	<1%	-	-	<1%	-
Church outing	1	<1%	<1%	-	-	<1%	-
Too see the marine parade	1	<1%	<1%	-	-	<1%	-
Visit a particular restaurant	1	<1%	-	-	<1%	<1%	-
Trendy	1	<1%	<1%	-	-	<1%	-
Fashion - looking for inspiration	1	<1%	<1%	-	-	<1%	-
Volks Railway	1	<1%	-	<1%	-	<1%	-
Boxing event	1	<1%	-	-	<1%	<1%	-
Glyndebourne festival	1	<1%	-	-	<1%	<1%	-
Stayed in Barcelo hotels abroad so thought I would try the one in Brighton	1	<1%	-	-	<1%	<1%	-
St Dunstan	1	<1%	-	-	<1%	<1%	-
Cycling	1	<1%	<1%	-	-	<1%	-
Friends needed a housesitter	1	<1%	-	-	<1%	<1%	-
Funeral	1	<1%	-	<1%	-	-	1%
Going on Orient Express	1	<1%	-	-	<1%	<1%	-
Lots of information about Brighton in homeland (Brazil)	1	<1%	<1%	-	-	<1%	-
Hen night	1	<1%	-	-	<1%	<1%	-
Gay clubs	1	<1%	-	-	<1%	<1%	-
London by the sea	1	<1%	-	-	<1%	<1%	-
Yearly pensioners club visit	1	<1%	<1%	-	-	<1%	-
Extreme sports festival	1	<1%	-	-	<1%	<1%	-
Total	**1,115**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**