

# Visitor Survey 2007

## About the survey

This survey was run by Tourism South East for VisitBrighton. Just over 1000 visitors were interviewed between August and September 2007. The locations used were the Train Station, North Laine, Coach Station, New Road, Lanes, Brighton & Hove Marina, the beach, Madeira Drive, Churchill Shopping Centre, Volks Electric Railway, Hove Seafront. Below is a summary of what this survey tells us about visitors.

NB. 1000 people is a good sample size but please treat these results with caution. We advise these results should be interpreted alongside existing research on Brighton and Hove's visitor market. We ensured only visitors were interviewed by excluding Brighton and Hove residents and any one visiting for non-leisure purposes (i.e. people visiting to work or study in Brighton, or do household shopping).

## Who's visiting Brighton and Hove?

- 81% of visitors were from the UK and the rest were from the overseas. The main source of overseas visitors was the Rest of Europe (everywhere in Europe apart from France, Germany, Belgium, Netherlands, Ireland), Australasia, and Germany.
- 61% of visitors came for the day, 39% stayed overnight.
- There are two types of day visitors, those that came from home (80% of day visitors) and those that came from other holiday bases (20% of day visitors). The highest proportion of day visitors from home came from the South East (46%) and London (35%). For day visitors from other holiday bases, 32% were from London and 36% from the South East. 8% were overseas visitors.
- 65% of staying visitors were from the UK and 35% were from overseas. In comparison to day visitors, UK staying visitors came from a wider range of locations including 18% from London, 9% from the South East, 5% from the South West and 5% from the West Midlands.
- Visitors of all age groups came to Brighton and Hove. Versus the national average there were significantly more people aged 16-34 (32% of visitors) and 55+ (also 32%).
- 71% of visitors fitted the ABCI social demographic. In particular there were a lot of C1 visitors, 48% versus a national average of 32%. The C1 category stands for clerical or supervisory and all other 'white collar' occupations.

## Why are they coming?

- 65% described their visit as holiday or leisure based. 17% were visiting friends and relatives (especially those who stayed overnight), 7% were coming for a special shopping trip (this was likely to be day visitors not staying visitors), 4% on business and 6% language students.
- Just over 20% were visiting Brighton and Hove for the first time. 78% had already been at least once. The number of return trips was very high for both day and staying visitors to Brighton and Hove. 58% of day visitors, and 42% of staying visitors had visited more than 4 times in the last 3 years.
- 51% of UK visitors came for a short break of 2-3 nights. 47% of overseas visitors were on a longer trip of over 14 nights (this is likely to be biased by language school students, many of whom stay for months not just weeks). Encouragingly the majority of day visitors (68%) spent over 5 hours in Brighton and Hove. The national average for tourism day trips is 3.5 hours.

- The most popular activities for visitors were walking around (81%), going to a restaurant or place to eat (70%), visiting the beach (60%), shopping (55%), visiting a tourist attraction (40%), relaxing (38%), and visiting a pub or a club (35%). Across all activities staying and overseas visitors did the most! The most popular attraction visited was Brighton Pier (12% of visitors), followed by the Royal Pavilion (8%), Brighton Museum and Art Gallery (3%) and the Sealife Centre (3%).

## How do they get here?

- 39% visitors used the train and 14% used a bus or coach to get to Brighton and Hove. Only 38% travelled by car or motorbike. This is very encouraging as at a regional level only 10% of visitors travel to destinations by train and 79% use their car or motorbike.

## Planning their visit?

- 50% of visitors said they used information sources to plan their trip. 81% overseas visitors researched before they came. As did 65% of staying visitors. However 66% day visitors did not use any information to plan their trip.
- In terms of information sources, 66% visitors used friends and family and 18% used the web. Again both overseas and staying visitors were likely to use these sources more.

## Where are they staying?

- 50% of visitors stayed in a hotel or a B&B. Interestingly 60% of UK visitors stayed in a Hotel or B&B versus 26% of overseas visitors. Overseas visitors were more likely to stay with a friend or a family (40%) or in language school accommodation (25%). This indicates that these figures may well be biased towards the language school market. 29% of UK visitors also stayed with a friend or family. The UK visitor research is positive for Brighton and Hove hoteliers as national research suggests only 30% of UK visitors stay in a hotel or B&B and 45% stay with a friend or relative.

## How much do they spend?

- The average spend per staying visitor per day was £88 (this includes accommodation). Overseas staying visitors spent more on accommodation whereas UK staying visitors spent more on eating out and shopping
- The average spend per day visitor was £28 per person. Overseas day visitors spent more on entertainment, UK day visitors spent more on shopping and eating out.

## How do we perform?

- Key motivators for visitors to choose a destination were 'easy to get to', 'plenty to see and do', 'good places to eat and drink', and 'good value for money'. This was true across most audiences overseas or UK, staying or day visitors. For overseas visitors, local heritage, good shopping and high arts and culture were also high on the list. In general the 2007 survey found that on nearly all these core motivators, visitor's expectations were exceeded.
- Overall visitors were very satisfied with the visitor experience, particularly the feeling of welcome. Also highly rated were choice of nightlife, places to eat and drink, shopping, ease of getting here and getting around. This is very good news as these factors are most likely to effect people's likelihood of returning or recommending Brighton and Hove to a friend.
- Visitors were less satisfied with the cost and availability of parking, as well as the limited availability of public toilets.
- With an average score of 8.5, visitor's overall enjoyment of their trip to Brighton and Hove was very high. Over 80% of people were highly likely to recommend the city to friends and relatives and return themselves. Visitors also rated Brighton and Hove very highly in comparison with other UK destinations, especially overseas and day visitors.