Report of Findings for VisitBrighton

Brighton Visitor Survey 2018

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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

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1. Executive Summary

1.1 Introduction

1.1.1 This document presents the findings of a survey of visitors to Brighton and Hove, conducted during July, August and September 2018. The survey was commissioned by VisitBrighton and undertaken by TSE Research.

1.1.2 The purpose of the survey was to enhance VisitBrighton's understanding of the city's tourism market and provide the basis for tourism policies. The results will be compared with the survey conducted in 2016.

1.1.3 Key findings from this year's survey are presented below.

1.2 Visitor profile

1.2.1 This year saw an increase in the proportion of day visitors from home (39% compared to 35% in 2016) but fewer people visiting as day visitors from holiday bases outside Brighton and Hove (19% compared to 28% in 2016). The remaining 42% of all visitors were staying overnight in commercial or non-commercial accommodation within Brighton and Hove, an increase of 5% compared with 2016 (37%).

1.2.2 Day visitors on holiday were found to be predominately staying in accommodation elsewhere in East Sussex (106 visitors), London (46 visitors) or in West Sussex (26 visitors).

1.2.3 Average group size is smaller when compared with 2016. On average, visiting parties consisted of 2.54 people, made up of 2.21 adults and 0.33 children. This compares to an average group size of 2.75 people in 2016 made up of 2.31 adults and 0.44 children.

1.2.4 As with previous years, a high proportion of all visiting parties consisted of adults only (80%), and among adult only groups, just over half (52%) consisted of two adults. Adult only groups made up 81% of visiting parties in 2016. This year 20% of all visitor parties included one or more children (19% in 2016).

1.2.5 Thirteen percent of all people represented within the visitor groups surveyed were children aged 0-15 years (compared to 17% in 20146. Thirty-six percent of all visitors were mature adults aged 55 years or more.

1.2.6 The survey results indicate a relatively affluent profile of visitors to Brighton and Hove. The majority of visitors were from ABC1 households (accounting for 68% of all visitors; 74% in 2016). This includes 22% of all visitors who were from the top AB professional grade (down from 32% in 2016).

1.2.7 Overseas visitors accounted for 20% of the overall sample (26% in 2016). Scandinavia, Germany, the United States, France and Australasia were the most frequently mentioned countries of residence.

1.2.8 Domestic visitors came from a wide range of home locations around the UK, however, the highest proportion originated from the South East (24%) and Greater London area (20%).

1.3 Use of destination information

1.3.1 Eighty-three percent of staying visitors searched online to choose their accommodation, 7% had received a recommendation from others, 5% had used social media and 1% had visited a Visitor Information Centre.

1.3.2 Sixty percent of all visitors did not use any information sources prior to their trip (40% in 2016).

1.3.3 Of the formal channels of visitor information available, word of mouth/recommendation was mentioned by 22% of visitors. A further 14% had looked online, 4% had used social media, 3% had seen a leaflet or brochure and 2% had been inspired by a television programme.

1.4 Trip features

1.4.1 The highest proportion of visitors indicated that the main purpose of their visit to Brighton and Hove was for 'leisure/ holiday' purposes (79%). Twelve percent were in Brighton and Hove primarily for the purpose of visiting friends or relatives (VFR), 2% were language students, 3% were on a special shopping trip and 1% were visiting for business purposes.

1.4.2 Thirty percent of staying visitors were on a short break of 2-3 nights, 19% for 1 night, 30% for 4-7 nights, 12% for 8-14 nights and 9% for more than 14 nights.

1.4.3 A high proportion (43%) of the visitors surveyed this summer were visiting Brighton and Hove with a partner and a further 14% indicating that they were travelling alone.

1.4.4 Of the visitor groups staying overnight in Brighton and Hove, 64% were using serviced accommodation (67%in 2016). Fifteen percent of all staying visitors were accommodated in the homes of friends or relatives in 2018 (17% in 2016) and 8% were staying in Air BnBs (2% in 2016).

1.4.5 Forty-two percent of all visitors had travelled to Brighton and Hove by private vehicle (car/ van/ motorcycle or motorhome); 36% in 2016. Fifty-four percent all visitors used public transport (a train or coach/bus service); 51% in 2016. Only 2% had arrived in the city as part of a coach tour (4% in 2016).

1.4.6 When asked what the main trigger had been for initiating their visit to Brighton and Hover, 26% said it was to visit the sea/beach and 18% said it had been to visit friends and/or relatives. Eleven percent had visited previously, 11% just wanted a day out and 7% had been triggered by the good summer weather.

1.4.7 The most popular activity undertaken by visitors was just walking around (81%), followed by going out for something to eat (76%), visiting the beach/seafront (75%), shopping (51%) and visiting a tourist attraction (46%). The main attractions visited were the pier (59%), the Royal Pavilion (29%) and the British Airways i360 (23%).

1.4.8 The average overall spend on eating out, shopping, entertainment and travel/transport among visitors staying overnight in Brighton and Hove in 2018 was £71.65 (per person per 24 hours), lower than the average expenditure of £74.27 in 2016. Expenditure on commercial accommodation was £105.47 (£94.94 in 2016). When added together the average total spend for staying visitors, was estimated to be £177.12 per person per night (£169.21 in 2016).

1.4.9 Day visitors on holiday visiting Brighton and Hove spent an average of £96.63 per person per day during 2018 (higher than the average expenditure of £90.03 in 2016). Eating out accounted for the highest proportion of their spend.

1.4.10 Day visitors from home to Brighton and Hove spent an average of £45.46 per person per day during 2016 (lower than the average expenditure of £54.33 in 2016). Eating out and shopping accounted for the highest proportion of day visitor from home spend.

1.5 Visitor satisfaction

1.5.1 As in previous years, high levels of visitor satisfaction were reported for many aspects relating to the visitor experience in Brighton and Hove. Aspects of the visit which were rated particularly highly in 2016 were *Lively gay scene* (8.77 out of 10), *Ease of finding way around* (8.66 out of 10), *Choice of nightlife/evening entertainment* (8.62 out of 10), *Quality of places to eat and drink* (8.61 out of 10), *Vibrant cosmopolitan atmosphere* (8.60 out of 10) and *Feeling of welcome* (8.60 out of 10).

1.5.2 It should be noted that only scores lower than 7 are poor scores. The only two aspects which were deemed low in 2016 were *Cleanliness and availability of public toilets* (6.53 out of 10) and *Value for money of parking* (5.27 out of 10).

1.5.3 An overview of all performance scores show that compared to 2016 most changes performance indicators saw an improvement. To be considered a significant improvement, there needs to be an increase in the satisfaction score of at least 0.20 points.

1.5.4 There are fifteen aspects which achieved this level of improvement this year compared to 2016, the most significant of which were *City heritage* (up 1.19 points in its score), *Transport in the city – cycles* (up 0.69 points in its score), *Transport in the city – buses* (up 0.62 points in its score) and *Lively gay scene* (up 0.43 points in its score).

1.5.5 Visitors rated the overall enjoyment of their visit to Brighton and Hove high at 8.66 out of 10.

1.5.6 Nearly all visitors (8.85 out of 10) indicated that they were 'likely' to recommend Brighton and Hove as a visitor destination to others and 8.81 out of 10 visitors said they were likely to return for a day trip or short stay.

2. Introduction

2.1 Study purpose and objectives

Over the peak summer period of 2018 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 and to track changes in the profile and experiences of visitors by comparing the results to the 2016 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.

2.2 Research methodology

To maintain consistency with the 2016 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 during July, August and September 2018.

A copy of the questionnaire is attached in Appendix 1.

In all, 4,343 people were stopped for interview. Of these 985 (23%) were not eligible to complete the interview and 2,037 (47%) refused to be stopped. In total 985 (23%) adult visitors were successfully interviewed at key locations in Brighton & Hove.

Overall, 474 (48%) completed interviews were achieved during the month of August, 294 (30%) in July and 217 (22%) completed interviews were achieved in September.

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

[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*

Table (i): Response rates

Location	Number of interviews	%
Train Station	79	8%
North Laine	55	6%
Coach Station	6	1%
New Road (including Pavilion and area outside TIC)	113	11%
East Street and Lanes	40	4%
Brighton Marina	9	1%
Beach (between both piers)	296	30%
Madeira Drive	50	5%
Churchill Shopping Centre	49	5%
Electric Railway	67	7%
British Airways i360	221	22%
Total	**985**	**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.

2.3 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	387	3.0	4.0	4.6	4.9	5.0
Day visitors on holiday	188	4.3	5.7	6.6	7.0	7.1
Staying visitors	410	2.9	3.9	4.4	4.7	4.8
Domestic	784	2.1	2.8	3.2	3.4	3.5
Overseas	201	4.1	5.5	6.3	6.8	6.9
Overall survey sample	**985**	**1.9**	**2.5**	**2.9**	**3.1**	**3.1**

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

2.4 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).

2.5 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.

3. Survey results

3.1 Visitor type

A total of 985 visitors were interviewed in Brighton and Hove during 2018. Of these, 58% were day visitors which is divided between day visitors from home (39% 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 (19%).

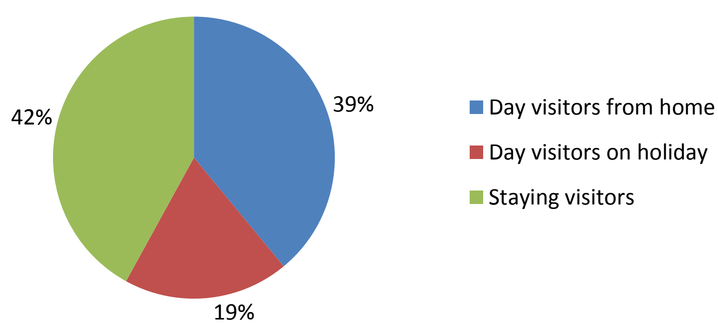
The survey found that over half (56%) of all day visitors on holiday were staying in other parts of East Sussex, 14% were staying in West Sussex, 24% were staying in London and the final 5% were staying elsewhere in the region. The remaining 42% of visitors were staying overnight in commercial or non-commercial accommodation within Brighton and Hove.

Table 1: Type of visitor

	2018	2016
Day visitors from home	39%	35%
Day visitors on holiday	19%	28%
Staying visitors	42%	37%

When compared with the findings from the 2016 survey, the proportion of staying visitors at 42% has increased (37% in 2016). It also appears that the proportions of day visitors from home (39%) has risen when compared with 2016 (35%) but that day visitors on holiday (19%) has decreased significantly (28% in 2016).

Figure 1: Type of visitor 2018



3.2 Profile of visitor

3.2.1 Domestic/Overseas

Lower proportions of overseas visitors were encountered in 2018 than in 2016 (20% compared with 26% in 2016), whereas the proportion of domestic visitors has increased (80% compared with 74% in 2016).

Table 2: Domestic/Overseas visitors

	All visitors 2018		All visitors 2016
Domestic visitors	784	80%	74%
Overseas visitors	201	20%	26%
Total	**985**	**100%**	**100%**

3.2.2 Home location of all visitors

As with previous years, the highest proportion of all visitors were from home locations in the South East (24%) and London (20%), this is similar to the findings from the 2016 survey (23% from South East and 17% from London).

A total of 20% of visitors were from overseas locations compared with 26% in 2016. Twenty-eight percent of staying visitors were from overseas.

Results split by trip type reveal that 41% of all day visitors from home came from the South East, whilst a third (33%) travelled from London. The home locations of domestic day visitors on holiday in Brighton and Hove were widespread throughout the UK. Relatively high proportions of staying visitors were also from home locations in the South East (14%) and London (15%).

Table 3: Home location of all visitors

	All visitors 2018		All visitors 2016	Day visitors from home	Day visitors on holiday	Staying visitor
South East	233	24%	23%	41%	9%	14%
London	201	20%	17%	33%	6%	15%
South	78	8%	4%	14%	5%	4%
South West	52	5%	7%	4%	6%	6%
East Midlands	47	5%	3%	2%	5%	7%
East Anglia	36	4%	3%	2%	3%	5%
West Midlands	25	3%	4%	1%	3%	3%
North West	31	3%	3%	1%	4%	5%
Yorkshire	31	3%	3%	<1%	6%	5%
North East	16	2%	2%	<1%	3%	2%
Scotland	15	2%	2%	<1%	1%	3%
Wales	13	1%	2%	<1%	3%	1%
Northern Ireland	6	1%	<1%	<1%	-	1%
Outside UK	201	20%	26%	-	46%	28%
Total	**985**	**100%**	**100%**	**100%**	**100%**	**100%**

Of the overseas visitors encountered in Brighton & Hove during the 2016 survey, the popular origins were Scandinavia, Germany, United States, France and Australasia.

Table 4: Home location of overseas staying visitors

	All overseas visitors 2018	All overseas visitors 2016	Staying in Brighton	Staying elsewhere in East Sussex	Staying elsewhere in West Sussex	Staying in London	Staying elsewhere
Scandinavia	15%	2%	22%	13%	13%	-	-
Germany	13%	15%	16%	13%	-	7%	17%
United States	11%	14%	9%	13%	-	17%	33%
France	10%	11%	9%	22%	13%	5%	-
Australasia	10%	10%	12%	6%	13%	7%	17%
Canada	5%	5%	4%	3%	-	10%	-
Spain	5%	18%	3%	6%	-	15%	-
Netherlands	5%	3%	5%	9%	13%	2%	-
China	2%	3%	2%	9%	-	-	-
Republic of Ireland	2%	<1%	3%	-	13%	-	17%
Belgium	1%	4%	1%	-	13%	-	17%
Italy	1%	4%	1%	-	-	5%	-
Russia	1%	<1%	-	-	-	5%	-
Other	9%	10%	16%	16%	6%	25%	-
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

'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 Channel Islands, Austria, Japan, Kuwait, Poland, Mexico, Israel, Bulgaria, Bermuda, Cyprus, Luxembourg, South Africa, UAE, Uzbekistan, Czech Republic and Egypt.

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.

3.2.3 Group size and composition

The average size of groups surveyed in 2018 was 2.54 people (2.21 adults and 0.33 children), which is lower than the average group size in 2016 (2.75 people).

Day visitors from home averaged the largest group size at 2.66 people (2.62 in 2016). This group also contained the largest proportion of children at 0.44 per visitor group. At an average of 2.42 people per group, the group size for staying visitors has decreased compared with 2016 (2.63).

Table 5: Average group size – by visitor type

	Average number of people per group		
	Adults	**Children**	**Total**
All visitors 2018	2.21	0.33	2.54
Day visitors from home	2.22	0.44	2.66
Day visitors on holiday	2.25	0.27	2.52
Staying visitors	2.18	0.24	2.42
All visitors 2016	2.31	0.44	2.75

As shown in Table 6, 80% of groups to Brighton and Hove contained adults only (down from 81% in 2016). Just over half of all the groups contained two adults only. Only fifteen percent of all groups contained just a single adult.

Twenty percent of groups to Brighton and Hove contained children, an increase of 1% point from 2016.

Table 6: Group composition

	All visitors 2018		All visitors 2016
One Adult	147	15%	14%
Two Adults	508	52%	50%
Three Adults	53	5%	5%
Four Adults	57	6%	10%
Five + Adults	24	2%	2%
Adults Only	**789**	**80%**	**81%**
One adult and one child	31	3%	2%
One adult and two or more children	13	1%	1%
Two adults and one child	55	6%	4%
Two adults and two or more children	50	5%	6%
Three adults and one child	17	2%	3%
Three adults and two or more children	8	1%	1%
Four or more adults with one or more children	22	2%	2%
Adults and Children	**196**	**20%**	**19%**
Total	**985**	**100%**	**100%**

3.2.4 Age and Gender Profile

Given the high proportion of groups containing adults only, it is not surprising to find that only 20% of all visitors were children (19% in 2016).

Seven percent of all visitors were aged 75 or over (2% in 2016). As shown in Table 7, below, the gender profile shows that females (57%) were better represented than males (43%).

Table 7: Age of visitors

	All visitors 2018	Day visitors from home	Day visitors on holiday	Staying visitors	All visitors 2016
0-17	13%	17%	11%	10%	16%
18-24	13%	11%	14%	15%	15%
25-34	12%	14%	11%	11%	12%
35-44	10%	13%	7%	9%	15%
45-54	18%	16%	14%	22%	15%
55-64	17%	14%	20%	19%	15%
65-74	12%	10%	19%	12%	12%
75+	7%	7%	3%	2%	2%
Male	**43%**	**42%**	**47%**	**41%**	**45%**
Female	**57%**	**58%**	**53%**	**59%**	**55%**

Totals may not tally to 100% due to rounding differences

3.2.5 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, 22% of all visitors to Brighton & Hove fell into the affluent 'AB' socio-economic group (32% in 2016), whilst a further 48% were 'C1s' (42% in 2016). Twenty-three percent of all visitors fell into the C2 category and only 6% of visitors comprised of the lowest 'DE' groups (19% and 8% in 2016 respectively).

Table 9: Socio-economic status comparisons

	All Visitors 2018	All Visitors 2016	Day visitors from home	Day visitors on holiday	Staying visitors
AB	22%	32%	17%	32%	22%
C1	48%	42%	46%	40%	54%
C2	23%	19%	29%	21%	20%
DE	6%	8%	8%	7%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

3.2.6 Who 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 (43%), followed by with family (28%). Overall, 86% of all visitors to Brighton and Hove were visiting with at least one other person while 14% were on their own.

Table 10: Are you visiting Brighton and Hove with/for?

	All visitors 2018		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
On your own	135	14%	14%	14%	13%	11%	22%
A partner	423	43%	39%	41%	47%	45%	34%
Your family	272	28%	29%	28%	26%	28%	25%
Your friends	54	5%	5%	10%	3%	5%	6%
Organised group	131	13%	16%	11%	12%	14%	12%
Hen/Stag group	10	1%	2%	2%	<1%	1%	2%

N.B. Multiple responses permitted

3.3 Trip characteristics

3.3.1 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 (79%) described their visit as a holiday or leisure based visit, while a further 12% were there to see friends and/or relatives. There was a slightly higher proportion of people on a holiday/leisure visit (73% in 2016) while the results for VFR are lower than the results from 2016 (16%).

The proportion of visitors on a special shopping trip remained static at 3%. Business/conference visitors accounted for only 1% (2% in 2016) and language students accounted for 2% (5% in 2016) 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 11: Main purpose of trip

	All visitors 2018		All visitors 2016	Day visitors from home	Day visitors on holiday	Staying visitors
Holiday/Leisure	783	79%	73%	82%	79%	78%
Visiting friends or relatives	119	12%	16%	10%	13%	14%
Special shopping trip (non-regular)	29	3%	3%	6%	2%	<1%
Language student	23	2%	5%	1%	4%	3%
Business/conference visit	13	1%	2%	1%	1%	2%
Shopping trip (household/regular shopping)	-	-	<1%	-	-	-
Work/study here	-	-	1%	-	-	-
Other e.g. house-hunting	18	2%	<1%	1%	1%	3%
Total	**985**	**100%**	**100%**	**100%**	**100%**	**100%**

3.3.2 Accommodation used by staying visitors

All 410 visitors staying in Brighton & Hove were asked to indicate the type of accommodation they were staying in. Just over two thirds (64%) of staying visitors were found to be staying in serviced accommodation in Brighton and Hove (52% in hotels and 12% in B&B/Guest houses). The results are comparable with the 2016 survey, except in the proportion staying in Air BnB which increased to 8% from 2% in 2016.

A further 15% of all staying visitors were staying in the homes of friends or relatives, although this has fallen from 2016 when 17% were staying with friends or relatives.

As with previous years, when the results are split between domestic and overseas visitors they 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 or an Air BnB establishment.

Table 12: Type of accommodation used for staying trips

	All staying visitors 2018		All staying visitors 2016	Domestic visitors	Overseas visitors
Hotel	212	52%	53%	57%	38%
Home of friend/relative	62	15%	17%	15%	15%
B&B/Guest House	49	12%	14%	11%	13%
Caravan/Camping	14	3%	4%	5%	-
Language school	3	1%	3%	-	3%
Air BnB	32	8%	2%	6%	12%
Youth Hostel	8	2%	2%	<1%	6%
Self-catering (Cottage/Apartments)	13	3%	1%	4%	1%
University accommodation	1	<1%	1%	-	1%
Self-catering (Holiday Complex/Village)	3	1%	1%	1%	1%
Pub/Inn	-	-	<1%	-	-
Boat/Yacht	1	<1%	<1%	-	1%
Holiday home/Timeshare	-	1%	-	<1%	-
Other	11	3%	2%	-	10%
Total	**410**	**100%**	**100%**	**100%**	**100%**

3.3.3 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 (106 visitors), London (46 visitors), West Sussex (26 visitors) and further afield (10 visitors).

3.3.4 Sources used to choose accommodation

When asked what sources they used to choose their accommodation, the majority of all visitors (83%) indicated that they had searched online prior to their arrival in Brighton and Hove. Seven percent had received a recommendation from others, 5% had used some form of social media, 2% had used a brochure and 1% had visited a Visitor Information Centre.

A further 3% had used an 'other' source to choose their accommodation, the results of which are shown in section 3.3.4.1.

The main differences between domestic and overseas visitors was that higher numbers of domestic visitors used the internet to choose their accommodation (85% compared with 79% of overseas), whereas 8% of overseas visitors used social media compared with 4% of domestic visitors. Overseas visitors (2%) were more likely to visit a Visitor Information Centre to book their accommodation than domestic visitors (0%).

Table 13: Sources used to choose accommodation

	Staying visitors 2018		Domestic visitors	Overseas visitors
Online	256	83%	85%	79%
Recommendation	21	7%	7%	7%
Visitor Information Centre	2	1%	-	2%
Social media	15	5%	4%	8%
Brochure	6	2%	2%	2%
Other	9	3%	3%	3%
Total	**307**	**100%**	**100%**	**100%**

3.3.4.1 Specified online sources

Staying visitors specified the online source they used to choose their accommodation. Half of these had visited Booking.com (50%), followed by AirBnB (10%) and Google (8%).

Table 14: Specified online sources used to choose accommodation

	Staying visitors 2018		Domestic visitors	Overseas visitors
Booking.com	127	50%	52%	45%
Air BnB	25	10%	8%	14%
Google	20	8%	9%	6%
Visit Brighton	18	7%	5%	13%
Hotels.com	17	7%	7%	6%
Trip Advisor	14	5%	5%	7%
Expedia	12	5%	5%	3%
Premier Inn website	4	2%	2%	-
The Caravan Club website	5	2%	2%	1%
Hostel World	4	2%	1%	3%
Hilton loyalty programme	4	2%	1%	3%
Travelodge website	3	1%	2%	-
Trivago	1	<1%	1%	-
Laterooms.com	1	<1%	1%	-
Brighton Holiday Homes	1	<1%	1%	-
Telegraph offer	1	<1%	-	1%
Dog Friendly B&B's	1	<1%	1%	-
Lastminute.com	1	<1%	1%	-
Total	**255**			

N.B. Multiple responses permitted

3.3.4.2 Other sources

Other sources used by staying visitors to choose their accommodation included being given a gift voucher/present (4 visitors), booked through a travel agent/tour operator (2 visitors) or via a television show (1 visitor).

Table 15: Other sources used to choose accommodation

	Staying visitors 2018
Git voucher/present	4
Travel agent/Tour operator	2
Television show	1
Total	**7**

3.3.5 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 46% of visitors the decision was made within a week of their visit. The highest proportion of these visitors had made their decision a week before their visit (17%), a further 11% decided the day before their visit, 9% within a few days and some made their decision on the day (8%).

It should come as no surprise that day visitors from home 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 (76%). In contrast, staying visitors were more likely to plan their visit in advance, with 62% making their decision more than three months before their visit.

Table 16: When visitors decided to make their trip to Brighton and Hove

	All visitors 2018		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Frequent visitor	3	<1%	<1%	-	<1%	<1%	-
Today	76	8%	16%	6%	1%	9%	4%
Within last few days	91	9%	14%	7%	6%	10%	5%
Yesterday	108	11%	17%	9%	7%	12%	7%
Within last week	170	17%	28%	10%	10%	20%	6%
Within last 2 weeks	85	9%	10%	6%	8%	10%	3%
Within last month	116	12%	7%	12%	16%	12%	11%
Within last 3 months	153	16%	6%	14%	25%	14%	20%
Within last 6 months	105	11%	1%	17%	17%	9%	18%
Last year	66	7%	1%	17%	8%	3%	21%
More than a year ago	12	1%	<1%	2%	2%	1%	3%
Total	**985**	**100%**	100%	100%	100%	100%	**100%**

Domestic visitors were more likely than overseas visitors to decide to visit Brighton and Hove closer to their visit, with 52% indicating that their decision was made within a week of their visit compared with only 22% of overseas visitors.

3.3.6 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 26% of all visitors, the initial trigger was to go to the sea/beach, 18% said that their initial trigger was to visit friends or family. Eleven percent had just felt like a day out, 11% had previously visited Brighton or Hove and 7% had been motivated by the good weather.

For a third of all day visitors from home (32%), the major 'trigger' to visit to Brighton and Hove was to visit the sea or beach compared with 24% of day visitors on holiday and 21% of staying visitors. Whereas, day visitors on holiday and staying visitors were more likely to have the 'trigger' of visiting family or friends (18% and 22% compared with 13% of day visitors from home).

Unsurprisingly, good weather was less likely to influence overseas visitors than domestic visitors (3% compared to 8%).

Due to the number of responses to this question, only those responses made by ten or more people are shown in Table 17, overleaf. The full list can be found in Appendix 2.

Table 17: What was the initial 'trigger' for thinking about visiting Brighton and Hove

	All visitors 2018		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Sea/Beach	253	26%	32%	24%	21%	26%	25%
See friends/family	175	18%	13%	18%	22%	17%	19%
On holiday/day out	113	11%	11%	13%	11%	12%	10%
Been before	105	11%	8%	10%	14%	11%	10%
Good weather	68	7%	12%	5%	3%	8%	3%
Easy to get to/close to London	35	4%	5%	3%	3%	4%	3%
Celebration	34	3%	2%	2%	5%	4%	1%
Event	33	3%	3%	-	5%	4%	1%
Shopping	32	3%	5%	3%	2%	4%	1%
Haven't been before	25	3%	1%	4%	3%	2%	4%
Pier	23	2%	5%	-	1%	3%	-
Work/Business/Conference	20	2%	2%	2%	3%	2%	2%
The Lanes	16	2%	3%	1%	<1%	2%	-
Pavilion	16	2%	2%	3%	1%	1%	3%
Coach tour/Package holiday	13	1%	2%	3%	-	2%	<1%
Recommendation	12	1%	1%	2%	1%	1%	1%
Learning English	12	1%	-	2%	2%	-	6%
School/College/Student	11	1%	1%	1%	1%	1%	3%

N.B. Multiple responses permitted

3.3.7 Transport used whilst in Brighton and Hove

Table 18: Transport used whilst in Brighton and Hove

	All visitors 2018		Domestic visitors	Overseas visitors	All visitors 2016
Foot	931	95%	95%	92%	91%
Bus	99	10%	9%	15%	9%
Car	57	6%	7%	3%	5%
Taxi	35	4%	3%	6%	8%
Train	20	2%	2%	3%	4%
Bicycle	19	2%	2%	2%	2%
Mobility scooter/Wheelchair	3	1%	1%	-	1%
Total	**985**				

N.B. Multiple responses permitted

The majority of all visitors (95%) travelled around Brighton and Hove by foot. Overseas visitors tended to use buses (15%) and taxis (6%) more than domestic visitors (9% and 3% respectively).

3.3.8 How navigated way round the City

Visitors were asked how they had navigated their way round the city. Half of all respondents did not use any specific method to find their way round the city. Of the half that did use a specific method, 26% of all visitors had used on-street pedestrian signs, 11% had used the VisitBrighton app and 30% had used the VisitBrighton's paper map. Less than 1% had used BHCC's cycle paper map.

Forty percent mentioned others ways that they had navigated their way round the city. Of these the most popular method was using Google maps (126 respondents), followed by) phone maps (28 respondents), previous visit (19 respondents), friends or relatives knowledge (11 respondents), local knowledge (6 respondents), using a SatNav (5 respondents), Cheeky Walks (4 respondents), other paper map (4 respondents), the council website (3 respondents) and Brighton/Hove bus app (2 respondents),

Table 19: How navigated round the city

	All visitors 2018		Domestic visitors	Overseas visitors
On-street pedestrian way finding signs	126	26%	29%	16%
VisitBrighton app	55	11%	9%	16%
VisitBrighton's paper map	147	30%	27%	36%
BHCC's cycle paper map	2	<1%	1%	-
Other	199	40%	39%	43%
Total	**493**			

N.B. Multiple responses permitted

3.3.9 Transport used for making trip

The highest proportion of all visitors (42%) had travelled to Brighton and Hove by train (45% in 2016), followed closely by those using by private car, van or motorcycle (41% compared with 34% in 2016). The usage of motor vehicles for travel had started to fall over the past few years with 37% using this mode in 2014, but this year saw a significant rise in usage.

There was slight drop in the numbers arriving by bus or coach service (12% compared with 14% in 2016) and those on a coach tour (2% compared with 4% in 2016).

Table 20: Mode of transport used

	All visitors 2018		All visitors 2016	Day visitors from home	Day visitors on holiday	Staying visitors
Train	413	42%	45%	39%	37%	47%
Car/van/motorcycle	401	41%	34%	45%	32%	40%
Bus/coach service	116	12%	14%	12%	23%	6%
Coach tour	24	2%	4%	3%	5%	1%
Motorhome	12	1%	2%	<1%	1%	2%
Taxi	6	1%	1%	-	1%	1%
Walked/on foot	5	1%	<1%	-	-	1%
Bicycle	2	<1%	<1%	<1%	1%	-
Private yacht/boat	4	<1%	<1%	-	1%	1%
Mobility scooter	2	<1%	<1%	<1%	-	<1%
Total	**985**	**100%**	**100%**	**100%**	**100%**	**100%**

3.3.10 Length of stay

Table 21, below, shows that a third (30%) of all staying visitors in 2018 were on a short break of 2-3 nights (41% in 2016). 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 (74%) were on a longer trip of over 4 nights.

Table 21: Duration of trip for staying visitors

	All visitors 2018		All visitors 2016	Domestic visitors	Overseas visitors
1 night	77	19%	19%	24%	4%
2-3 nights	123	30%	41%	33%	22%
4-7 nights	124	30%	25%	29%	34%
8-14 nights	51	12%	10%	10%	18%
Over 14 nights	35	9%	5%	3%	22%
Total	**410**	**100%**	**100%**	**100%**	**100%**

3.3.11 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, 60% of visitors did not use any information source prior to their trip compared to 40% in 2016. A further 22% had received information from family members, friends or colleagues (41% in 2016).

Other sources of information used by visitors prior to their visit included previous visit to Brighton and Hove (10 visitors), books (1 visitor), business (2 visitors), school (2 visitors), Stonewall (2 visitors), concert (3 visitors), the pier (5 visitors), Visit Brighton (2 visitors), Trip Advisor (1 visitor) and British Legion association (1 visitor).

Table 22: Sources of information used to plan trip – by visitor type

	All visitors 2018		All visitors 2016
Family/friends/colleagues	215	22%	41%
Website or web advertisement	135	14%	11%
Social media	43	4%	N/A
Leaflets/brochures	29	3%	4%
TV programme	18	2%	2%
Visitor Information Centre	8	1%	5%
Newspaper article/magazine feature	7	1%	1%
Posters	6	1%	1%
Travel agent	3	<1%	2%
Newspaper/magazine adverts	3	<1%	1%
Time Out guide	4	<1%	1%
TV advert	2	<1%	1%
Radio advert	2	<1%	<1%
Radio programme	4	<1%	<1%
Used NO information prior to trip	594	60%	40%
Other	30	3%	2%

N.B. Multiple responses permitted

3.3.12 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.

Table 23: Leisure activities undertaken – by visitor type

	All visitors 2018		All visitors 2016	Day visitor from home	Day visitors on holiday	Staying visitor	Domestic visitors	Overseas visitors
Just walking around	796	81%	64%	77%	78%	86%	81%	78%
Going to a restaurant or place to eat out	751	76%	77%	67%	74%	86%	75%	80%
Visiting the beach/seafront	734	75%	82%	71%	68%	80%	75%	74%
Shopping	504	51%	54%	44%	48%	60%	50%	57%
Visiting tourist attraction	449	46%	55%	35%	49%	54%	42%	59%
Visit a pub/club	335	34%	43%	22%	27%	49%	33%	37%
Relaxing/enjoying view/picnicking etc.	322	33%	30%	32%	22%	38%	34%	26%
Viewing architecture	114	12%	12%	7%	9%	17%	10%	18%
Going to see a film/show/gig/theatre	72	7%	11%	3%	4%	13%	7%	8%
Walking/cycling in surrounding countryside	59	6%	8%	4%	5%	9%	6%	7%
Going on organised trip/tour	39	4%	10%	1%	6%	5%	3%	8%
Doing an organised experience/tour	35	4%	N/A	-	5%	6%	3%	7%
Pursuing a hobby/special interest	25	3%	2%	1%	2%	4%	2%	3%
Going to an event	32	3%	2%	<1%	1%	7%	3%	3%
Pursuing a water sport/interest	10	1%	1%	1%	2%	1%	1%	1%
Other	1	<1%	1%	<1%	-	-	<1%	-

N.B. Multiple responses permitted

As shown in Table 23, the four most popular activities undertaken by over half of those interviewed were 'Just walking around' (81%), 'Going to a restaurant or place to eat out' (76%), 'Visiting the beach or seafront' (75%) and 'Shopping' (51%). All five activities were the same top four as in 2016 but ranked in slightly different order.

3.3.12.1 Events and attractions visited

As shown in Table 24, below, out of the visitors that indicated they were attending an event, the most popular was going to The Friends Fest exhibition (14 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 (265 respondents). This was followed by The Pavilion (129 respondents) and the British Airways i360 (102 respondents).

Table 24: Events gone to

	No. of responses
Friends Fest	14
Music festival/concert	6
Comedy Club	3
Snail sculpture	3
Cocktail tasting	2
60's evening Mods	2
Dancing venues	1
Scooter rally	1

Table 25: Attractions visited

	No. of responses
Pier	265
Pavilion	129
British Airways i360	102
Beach	29
Brighton Museum	23
The Lanes	19
Sea Life Centre	16
Volks Railway	15
Art Gallery	6
Marina	4
Arcades/Rides	3
Choccywoccydoodah	3
Komedia	2
Hove lagoon	2
Gardens	2
Ghost tour bus	1
Monks House	1
Mini golf	1
Library	1
Architecture	1

3.4 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 the special shopping trip, language students and business/conference categories are low so please take this into consideration when viewing these figures.

3.4.1 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 £71.65 (£74.27 in 2016). With the addition of accommodation, it came to approximately £177.12 (£169.21 in 2016).

Table 26: Average spend by staying visitors (£/per person/per 24 hrs)

Category of expenditure	All staying visitors 2018	All staying visitors 2016	Domestic visitors	Overseas visitors
Accommodation	**£105.47**	£94.94	£100.96	£117.35
Eating out	**£30.57**	£29.85	£31.74	£27.48
Shopping	**£18.66**	£23.27	£18.92	£17.99
Entertainment	**£12.49**	£12.89	£12.35	£12.86
Travel	**£9.93**	£8.26	£10.96	£7.22
Total Ave.	**£177.12**	£169.21	£174.93	£182.90

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

The average spend on accommodation at £105.47 varied across the type of accommodation used during the stay, and resulted in a high average spend when compared to 2016 (£94.94).

The average expenditure between both domestic and overseas staying visitors varied, with domestic visitors spending an average of £174.93 per person per 24 hours (£170.35 in 2016) and £182.90 by overseas visitors (£157.12 in 2016). Domestic visitors spent more on eating out, shopping and travel than overseas visitors.

Due to the extreme temperatures during summer a number of visitors spent the day on the beach and so average spend on eating out, shopping and entertainment has seen a fall.

Table 27: Average spend of visitors staying in Brighton by main reason for visiting (£/per person/per 24 hrs)

Category of expenditure	Leisure/ Holiday		Visiting friends and relatives		Special shopping trip		Language student		Business/conference	
	2018	2016	**2018**	2016	**2018**	2016	**2018**	2016	**2018**	2016
Accommodation	**£110.37**	£123.23	**£92.87**	£29.41	**£150.00**	£53.33	**-**	-	**£299.69**	£188.75
Eating out	**£32.27**	£38.44	**£24.47**	£15.75	**£22.50**	£15.58	**£16.25**	£15.48	**£38.46**	£25.94
Shopping	**£17.87**	£27.10	**£19.28**	£14.03	**£42.50**	£23.56	**£24.33**	£21.15	**£10.77**	£34.69
Entertainment	**£12.84**	£14.90	**£9.89**	£10.82	**£35.00**	£7.78	**£17.92**	£8.23	**£11.15**	£1.44
Travel	**£8.40**	£9.57	**£20.70**	£5.40	**£4.00**	£13.00	**£11.71**	£1.45	**£4.31**	£3.75
Total Ave.	**£181.75**	£213.24	**£167.21**	£75.41	**£254.00**	£113.25	**£70.21**	£46.31	**£364.38**	£254.57

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

3.4.2 Day visitors on holiday expenditure

Day visitors on holiday spent slightly more overall in 2018 (£96.63) compared to the overall amount spent in 2016 (£90.03). Opposite to previous years, overseas visitors spent more money on average, with £113.02 per person per day (£74.03 in 2016) compared to £83.00 by domestic visitors (£101.30 in 2016).

Table 28: Average expenditure of day visitors on holiday (£/per person/per day)

Category of expenditure	All day visitors on holiday 2018	All day visitors on holiday 2016	Domestic visitors	Overseas visitors
Eating out	**£54.75**	£41.78	£46.49	£64.39
Shopping	**£20.65**	£22.52	£13.74	£29.33
Entertainment	**£12.05**	£14.45	£10.18	£14.39
Travel	**£9.18**	£11.28	£12.59	£4.91
Total Ave.	**£96.63**	£90.03	£83.00	£113.02

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 on a leisure visit and those visiting friends and relatives spent the most per day compared to other purposes listed in Table 29.

Table 29: Average spend of day visitors on holiday by main reason for visiting (£/per person/per 24 hrs)

Category of expenditure	Leisure/ Holiday		Visiting friends and relatives		Special shopping trip		Language student		Business/conference	
	2018	2016	**2018**	2016	**2018**	2016	**2018**	2016	**2018**	2016
Eating out	**£56.88**	£43.92	**£55.00**	£38.51	**£35.00**	£37.86	**£17.33**	£17.80	**£22.50**	£2.50
Shopping	**£19.86**	£21.10	**£28.43**	£27.31	**£11.33**	£22.86	**£29.20**	£36.57	**£19.50**	£1.25
Entertainment	**£12.33**	£13.75	**£11.35**	£19.13	**£5.67**	£15.71	**£17.00**	£12.94	**£5.50**	£5.00
Travel	**£10.45**	£11.41	**£1.05**	£12.27	**£5.00**	£8.57	**£20.50**	£8.54	**£7.50**	-
Total Ave.	**£99.52**	£90.18	**£95.83**	£97.25	**£57.00**	£85.00	**£84.03**	£75.85	**£55.00**	£8.75

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

3.4.3 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 2018 was £45.46 - £54.33 in 2016. This slight fall in expenditure can probably be accounted for by the large number of day visitors from home that had come to just spend the day at the beach due to the hot weather and therefore did not spend as much on eating out or shopping.

Table 30: Average expenditure of day visitors from home (£/per person/per day)

Category of expenditure	All day visitors from home 2018	All day visitors from home 2016
Eating out	**£18.52**	£23.06
Shopping	**£15.81**	£16.83
Entertainment	**£7.03**	£7.20
Travel	**£4.10**	£7.24
Total Ave.	**£45.46**	£54.33

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 or relatives spent significantly less per day compared to 2016, all aspects of spend saw a fall for this group.

Table 31: Average spend of day visitors from home by main reason for visiting (£/per person/per 24 hrs)

Category of expenditure	Leisure/ Holiday		Visiting friends and relatives		Special shopping trip		Language student		Business/conference	
	2018	2016	**2018**	2016	**2018**	2016	**2018**	2016	**2018**	2016
Eating out	**£18.13**	£20.30	**£22.34**	£35.83	**£16.02**	£26.16	**£7.50**	£15.83	**£10.00**	£12.50
Shopping	**£15.40**	£11.40	**£7.49**	£27.60	**£48.86**	£61.47	**£5.00**	£8.33	**£6.00**	-
Entertainment	**£7.11**	£6.05	**£6.09**	£8.94	**£3.75**	£15.39	**£5.00**	£10.00	**-**	-
Travel	**£4.20**	£6.06	**£3.42**	£11.55	**£4.20**	£9.20	**£3.75**	-	**£3.60**	£12.08
Total Ave.	**£44.84**	£43.81	**£39.34**	£83.92	**£72.83**	£112.22	**£21.25**	£34.16	**£19.60**	£24.58

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

3.5 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.

3.5.1 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 7.87, higher than the average score of 7.65 achieved in 2016.

At 7.67, the mean average score on value for money was also higher than the average given in 2016 (7.56).

Table 32: Rating on accommodation

	1	2	3	4	5	6	7	8	9	10	Mean 2018	Mean 2016
Quality of commercial accommodation	-	1%	1%	2%	5%	10%	14%	31%	18%	18%	**7.87**	7.65
Value for money of commercial accommodation	<1%	1%	1%	1%	9%	9%	20%	26%	13%	19%	**7.67**	7.56

Overseas visitors also rated the quality of commercial accommodation (7.69) similarly to 2016 (7.64), but value of money lower than in 2016 (7.59 compared with 7.65). Domestic visitors provided much higher average mean scores on both quality (7.95) and value for money (7.70) than in 2016 (7.66 and 7.52 respectively).

Table 33: Rating on accommodation by domestic/overseas

	Domestic visitors 2018	Domestic visitors 2016	Overseas visitors 2018	Overseas visitors 2016
Quality of commercial accommodation	**7.95**	7.66	**7.69**	7.64
Value for money of commercial accommodation	**7.70**	7.52	**7.59**	7.65

3.5.2 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 high level of satisfaction with only two out of twenty-eight of attributes measured receiving scores of less than 7.

Table 34: Satisfaction scores – all visitors

	1	2	3	4	5	6	7	8	9	10	Mean 2018	Mean 2016
Ease of getting here	<1%	1%	1%	2%	2%	4%	9%	23%	24%	34%	**8.49**	8.26
Ease of parking	4%	4%	6%	6%	8%	7%	11%	20%	12%	23%	**7.03**	6.92
Value for money of parking	12%	8%	12%	9%	12%	9%	12%	11%	5%	10%	**5.27**	5.39
Quality and value for money of accommodation	<1%	1%	1%	2%	5%	7%	20%	30%	17%	17%	**7.80**	7.57
Overall impression of Brighton and Hove in terms of feeling of welcome	-	-	<1%	<1%	2%	3%	9%	31%	28%	27%	**8.60**	8.32
Welcome by City Champions	1%	-	1%	-	2%	6%	26%	31%	21%	12%	**7.89**	7.75
Visitor Information Points - Quality of service	-	-	3%	-	3%	5%	15%	34%	22%	18%	**8.11**	7.80
Visitor Information Centre - Ease of finding locations	-	-	1%	1%	3%	7%	15%	31%	24%	19%	**8.20**	7.92
Transport in the City –Buses	-	-	1%	1%	1%	6%	10%	23%	23%	35%	**8.59**	7.97
Transport in the City –Cycle routes	2%	-	2%	2%	2%	2%	9%	30%	26%	24%	**8.20**	7.51
Transport in the City - Taxi's and their drivers	-	-	3%	-	3%	8%	17%	30%	21%	18%	**8.01**	7.78
Transport in the City – Rail	1%	3%	3%	2%	5%	3%	10%	17%	24%	31%	**8.03**	7.92
Ease of finding way around	<1%	<1%	<1%	<1%	1%	2%	10%	28%	27%	31%	**8.66**	8.39
Quality of visitor attractions & other places to visit	-	<1%	<1%	<1%	1%	3%	10%	37%	26%	22%	**8.48**	8.28
Value for money of visitor attractions & other places to visit	<1%	<1%	<1%	1%	4%	7%	19%	34%	20%	14%	**7.95**	7.84
Quality of places to eat & drink	<1%	<1%	-	<1%	1%	2%	10%	32%	29%	26%	**8.61**	8.31
Value for money of places to eat & drink	<1%	<1%	<1%	1%	2%	6%	18%	34%	24%	14%	**8.09**	7.92
Quality of the shopping	<1%	-	-	<1%	1%	5%	9%	32%	29%	24%	**8.53**	8.28
Cleanliness and availability of public toilets	4%	2%	6%	6%	13%	13%	17%	21%	10%	9%	**6.53**	7.26
Cleanliness of streets	1%	1%	2%	5%	10%	16%	22%	23%	11%	9%	**7.00**	7.39
Upkeep of parks/open spaces/seafront	1%	-	<1%	1%	3%	9%	25%	30%	18%	12%	**7.79**	7.79
Quality of beach/seafront	<1%	<1%	<1%	1%	1%	5%	16%	35%	23%	18%	**8.24**	8.10
City heritage	-	-	<1%	<1%	2%	3%	12%	33%	27%	22%	**8.45**	7.26
Vibrant cosmopolitan atmosphere	<1%	-	<1%	1%	1%	2%	9%	32%	27%	28%	**8.60**	8.51
Feeling safe and secure in the City	-	<1%	<1%	<1%	1%	3%	13%	29%	29%	25%	**8.54**	8.44
Choice of nightlife/evening entertainment	<1%	-	<1%	1%	1%	1%	10%	32%	27%	28%	**8.62**	8.37
Ease of driving around the City	2%	2%	2%	7%	6%	12%	21%	22%	12%	14%	**7.15**	7.24
Lively gay scene	-	-	-	<1%	1%	2%	8%	26%	30%	32%	**8.77**	8.34

Table 34, on previous page, shows only four attributes of visitors' satisfaction not exceeding the 2016 ratings, these were for 'Value for money of parking', 'Cleanliness and availability of public toilets', Cleanliness of streets' and 'Ease of driving around the City' (indicated in red on the table).

The highest average score of 8.77 was given to 'Lively gay scene' (8.34 in 2016). 'Ease of finding way around', 'Choice of nightlife/evening entertainment', 'Quality of places to eat and drink', 'Vibrant cosmopolitan atmosphere' and 'Overall impression in terms of feeling of welcome' also received high average scores.

Table 35: Satisfaction scores – by type of visitor

	Day visitors from home 2018	**Day visitors from home 2016**	**Day visitor on holiday 2018**	**Day visitor on holiday 2016**	**Staying visitors 2018**	**Staying visitors 2016**
Ease of getting here	**8.44**	8.73	**8.45**	7.83	**8.56**	8.11
Ease of parking	**7.03**	7.37	**7.47**	6.13	**6.84**	6.98
Value for money of parking	**5.40**	5.30	**5.52**	4.98	**5.03**	5.73
Quality and value for money of accommodation	**7.50**	8.17	**7.73**	7.21	**7.83**	7.69
Overall impression of Brighton and Hove in terms of feeling of welcome	**8.50**	8.41	**8.58**	7.98	**8.69**	8.49
Welcome by City Champions	**7.56**	7.86	**8.10**	7.70	**8.37**	7.75
Visitor Information Centre - Quality of service	**7.89**	8.20	**8.28**	7.63	**8.25**	7.78
Visitor Information Centre - Ease of finding locations	**8.15**	8.29	**8.26**	7.76	**8.22**	7.87
Transport in the City - Buses	**8.38**	8.27	**8.60**	7.51	**8.68**	8.20
Transport in the City – Cycle routes	**8.54**	8.13	**8.09**	7.17	**8.05**	7.54
Transport in the City - Taxi's and their drivers	**7.73**	8.09	**8.06**	7.42	**8.07**	7.91
Transport in the City - Rail	**8.09**	8.41	**7.82**	7.35	**8.10**	8.02
Ease of finding way around	**8.68**	8.76	**8.40**	7.94	**8.75**	8.35
Quality of visitor attractions & other places to visit	**8.40**	8.44	**8.43**	8.05	**8.58**	8.29
Value for money of visitor attractions/places to visit	**7.83**	8.14	**7.91**	7.77	**8.08**	7.67
Quality of places to eat & drink	**8.53**	8.50	**8.48**	7.93	**8.73**	8.38
Value for money of places to eat & drink	**8.01**	8.04	**8.07**	7.58	**8.18**	8.02
Quality of the shopping	**8.44**	8.62	**8.42**	7.85	**8.66**	8.28
Cleanliness and availability of public toilets	**6.47**	7.41	**7.02**	7.28	**6.35**	7.11
Cleanliness of streets	**7.03**	7.44	**7.09**	7.40	**6.93**	7.34
Upkeep of parks/open spaces/seafront	**7.73**	7.94	**7.85**	7.56	**7.81**	7.83
Quality of beach/seafront	**8.18**	8.12	**8.23**	7.87	**8.30**	8.22
City heritage	**8.32**	8.53	**8.59**	7.93	**8.53**	8.32
Vibrant cosmopolitan atmosphere	**8.47**	8.78	**8.56**	8.21	**8.74**	8.47
Feeling safe and secure in the City	**8.52**	8.62	**8.56**	8.24	**8.54**	8.41
Choice of nightlife/evening entertainment	**8.53**	8.80	**8.71**	7.97	**8.66**	8.35
Ease of driving around the City	**6.97**	6.97	**7.84**	7.43	**7.02**	7.35
Lively gay scene	**8.63**	8.83	**8.89**	7.72	**8.89**	8.31

Overall, day visitors on holiday appear more satisfied with their visit to Brighton and Hove compared to both day visitors from home and staying visitors groups. In all, day visitors on holiday rated 26 of the key indicators higher when compared with staying visitors - who rated 22 higher than in 2016 - and day visitors from home - who only rated 7 attributes higher than in 2016.

Table 36: Satisfaction scores – by type of visitor

	Domestic visitors 2018	Domestic visitors 2016	Overseas visitors 2018	Overseas visitors 2016
Ease of getting here	**8.47**	8.31	**8.58**	8.12
Ease of parking	**7.01**	6.96	**7.20**	6.70
Value for money of parking	**5.24**	5.37	**5.56**	5.46
Quality and value for money of accommodation	**7.84**	7.53	**7.73**	7.62
Overall impression of Brighton and Hove in terms of feeling of welcome	**8.62**	8.38	**8.53**	8.15
Welcome by City Champions	**7.81**	7.79	**8.19**	7.71
Visitor Information Centre - Quality of service	**8.05**	7.85	**8.31**	7.72
Visitor Information Centre - Ease of finding locations	**8.23**	7.93	**8.13**	7.90
Transport in the City - Buses	**8.70**	8.16	**8.34**	7.61
Transport in the City – Cycle routes	**8.37**	7.63	**7.64**	7.33
Transport in the City - Taxi's and their drivers	**7.93**	7.91	**8.14**	7.54
Transport in the City - Rail	**8.10**	8.05	**7.85**	7.64
Ease of finding way around	**8.72**	8.47	**8.45**	8.16
Quality of visitor attractions & other places to visit	**8.49**	8.35	**8.44**	8.06
Value for money of visitor attractions/places to visit	**7.95**	7.88	**7.96**	7.75
Quality of places to eat & drink	**8.64**	8.41	**8.47**	8.03
Value for money of places to eat & drink	**8.10**	7.98	**8.04**	7.77
Quality of the shopping	**8.54**	8.40	**8.49**	7.94
Cleanliness and availability of public toilets	**6.52**	7.24	**6.53**	7.30
Cleanliness of streets	**7.03**	7.45	**6.86**	7.23
Upkeep of parks/open spaces/seafront	**7.83**	7.89	**7.61**	7.54
Quality of beach/seafront	**8.28**	8.19	**8.07**	7.84
City heritage	**8.43**	8.38	**8.55**	7.98
Vibrant cosmopolitan atmosphere	**8.62**	8.64	**8.53**	8.15
Feeling safe and secure in the City	**8.54**	8.51	**8.51**	8.24
Choice of nightlife/evening entertainment	**8.64**	8.57	**8.53**	7.84
Ease of driving around the City	**7.05**	7.20	**7.94**	7.36
Lively gay scene	**8.82**	8.53	**8.54**	7.71

As shown in Table 39, above, domestic visitors appear less satisfied with their visit to Brighton and Hove than in previous years compared to overseas visitors, with overseas visitors rating 26 of the key indicators higher compared to 2016 compared with domestic visitors only rating 22 of the key indicators higher than in 2016.

3.5.3 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 8.66, visitor's overall enjoyment of their trip to Brighton & Hove was slightly lower than in 2016 (8.71). With nearly 9 out of 10 people likely to recommend the city to friends and relatives (8.85) and return themselves (8.81), 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 score provided in 2016 (8.01 compared with 8.10).

Table 37: Overall rating score

	1	2	3	4	5	6	7	8	9	10	Mean 2018	Mean 2016
How would you rate the overall enjoyment of your visit to Brighton & Hove?	-	-	<1%	<1%	1%	2%	9%	33%	27%	28%	**8.66**	8.71
How likely are you to recommend Brighton & Hove to others?	-	-	<1%	<1%	1%	2%	6%	27%	24%	39%	**8.85**	8.90
How likely are you to return to Brighton & Hove for a day trip/short stay?	<1%	1%	1%	1%	4%	3%	6%	17%	20%	48%	**8.81**	8.76
Overall, how would you rate what is on offer in Brighton & Hove compared to other places visited in the UK	<1%	-	1%	1%	6%	8%	16%	31%	20%	19%	**8.01**	8.10

When broken down in to visitor type, as with previous years, it appears that staying visitors (8.77) tended to enjoy their visit more overall compared to both day visitors from home (8.55) and day visitors on holiday (8.66). 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.

Table 38: Overall rating score by visitor type

	Day visitors from home 2018	Day visitors from home 2016	Day visitors on holiday 2018	Day visitors on holiday 2016	Staying visitors 2018	Staying visitors 2016
How would you rate the overall enjoyment of your visit to Brighton & Hove?	**8.55**	8.56	**8.66**	8.71	**8.77**	8.83
How likely are you to recommend Brighton & Hove to others?	**8.72**	8.94	**8.85**	8.67	**8.99**	9.05
How likely are you to return to Brighton & Hove for a day trip/short stay?	**8.95**	8.85	**8.37**	8.37	**8.86**	8.92
Overall, how would you rate what is on offer in Brighton & Hove compared to other places visited in the UK	**7.97**	8.13	**7.77**	7.85	**8.15**	8.25

Domestic visitors appear to have enjoyed their visit to Brighton and Hove slightly more than overseas visitors which, as Table 42 indicates, has resulted in a higher mean score for likely to recommend and return.

Table 39: Overall rating score by visitor type

	Domestic Visitors 2018	Domestic Visitors 2016	Overseas visitors 2018	Overseas visitors 2016
How would you rate the overall enjoyment of your visit to Brighton & Hove?	**8.68**	8.71	**8.59**	8.71
How likely are you to recommend Brighton & Hove to others?	**8.88**	8.99	**8.74**	8.70
How likely are you to return to Brighton & Hove for a day trip/short stay?	**9.00**	8.94	**7.95**	8.25
Overall, how would you rate what is on offer in Brighton & Hove compared to other places visited in the UK	**8.12**	8.17	**7.48**	7.87

Appendix 1 – Brighton and Hove Visitor Survey 2018 Questionnaire

BRIGHTON & HOVE VISITOR SURVEY 2018

Date: / /18 **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 British Airways i360 ❑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 10-12 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	5-7 nights	4
2 nights	2	7+ nights	5
3-4 nights	3		

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

Hotel	1 *(Go to Q5b)*
B&B/Guest House	2 *(Go to Q5b)*
AirBmB	3 *(Go to Q5b)*
Pub/Inn	4 *(Go to Q5b)*
Holiday home/Timeshare	5 *(Go to Q6)*
Self-catering (Holiday Complex/Village)	6 *(Go to Q5c)*
Self-catering (Cottage/Apartments)	7 *(Go to Q5c)*
Caravan/Camping	8 *(Go to Q5c)*
Youth Hotel	9 *(Go to Q5c)*
Boat/yacht	10 *(Go to Q5c)*
Language school	11 *(Go to Q5c)*
Home of friend/relative	12 *(Go to Q6)*
University accommodation	13 *(Go to Q5c)*
Other *(specify below)*	14 *(Go to Q5c)*

....

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
Social media	5
Other *(specify below)*	6

....

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

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

....

8. 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
Social media	11
Travel agent	12
Visitor information centre	13
Family/friends/colleagues	14
USED NO INFORMATION PRIOR TO TRIP	15
Other *(specify below)*	16

....

9. What transport have you (and your group) used whilst in Brighton?
(SHOWCARD 5 – circle all that apply)

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

10. 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

11. What leisure activities are you (and your group) planning to pursue/have already undertaken during your holiday/visit?
(SHOWCARD 6 – circle all that apply)

Visit a pub/club	1
Going to a restaurant or place to eat out	2
Just walking around	3
Doing an organised tour/experience	4
Walking/Cycling *in surrounding countryside*	5
Going to an event *(specify below)*	6
Going on organised trip/tour	7
Shopping	8
Going to see a film/show/gig/theatre	9
Relaxing/enjoying view/picnicking etc	10
Visiting a tourist attraction (e.g. museum, art gallery, historic building, pier) *(specify below)*	11
Visiting the beach and seafront	12
Pursuing a hobby/special interest.	13
Pursuing a water sport/interest	14
Viewing architecture	15
Other *(specify below)*	16

....

12. 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 ☐

12a. How many people do these amounts cover

☐ People

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

On your own	1	Your friends	5
A partner	2	Organised group	6
Your family	3	Hen/Stag group	7
Extended family group	4		

14. Including yourself, how many people in your immediate party are male and female, and which of these age groups do they fall into? *(SHOWCARD 7)*

	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

15. 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

16. How would you rate the overall enjoyment of your visit to Brighton/Hove? *(SHOWCARD 9 – circle one response for each row)*

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

17. How likely are you to recommend Brighton/Hove to others? *(SHOWCARD 10 - circle one response for each row)*

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

18. How likely are you to return to Brighton/Hove for a day trip/short stay? *(SHOWCARD 10 - circle one response for each row)*

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

19. 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 11 - 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

20. 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

....

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

....

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

Name of respondent ....

Email/Tel. Number ....

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

Yes 1 No 2

24. Lastly, would you please complete this Equalities Monitoring form? *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 2018		Day visitors from home	Day visitors on holiday	Staying visitors	Domestic visitors	Overseas visitors
Sea/Beach	253	26%	32%	24%	21%	26%	25%
See friends/family	175	18%	13%	18%	22%	17%	19%
On holiday/day out	113	11%	11%	13%	11%	12%	10%
Been before	105	11%	8%	10%	14%	11%	10%
Good weather	68	7%	12%	5%	3%	8%	3%
Easy to get to/close to London	35	4%	5%	3%	3%	4%	3%
Celebration	34	3%	2%	2%	5%	4%	1%
Event	33	3%	3%	-	5%	4%	1%
Shopping	32	3%	5%	3%	2%	4%	1%
Haven't been before	25	3%	1%	4%	3%	2%	4%
Pier	23	2%	5%	-	1%	3%	-
Work/Business/Conference	20	2%	2%	2%	3%	2%	2%
The Lanes	16	2%	3%	1%	<1%	2%	-
Pavilion	16	2%	2%	3%	1%	1%	3%
Coach tour/Package holiday	13	1%	2%	3%	-	2%	<1%
Recommendation	12	1%	1%	2%	1%	1%	1%
Learning English	12	1%	-	2%	2%	-	6%
School/College/Student	11	1%	1%	1%	1%	1%	3%
i360	9	1%	1%	2%	<1%	1%	-
Pride	8	1%	-	2%	1%	1%	2%
Lots to do	7	1%	1%	1%	<1%	1%	-
Tourist attraction (unnamed)	6	1%	1%	1%	<1%	1%	<1%
Passing through	6	1%	<1%	2%	<1%	1%	<1%
Somewhere to eat	5	1%	1%	-	<1%	1%	-
News/TV/Radio	4	<1%	-	-	1%	<1%	1%
Atmosphere	4	<1%	<1%	1%	<1%	<1%	<1%
Hen/Stag weekend	4	<1%	<1%	-	1%	1%	-
Language School	3	<1%	-	-	1%	-	1%
Theatre/Opera	3	<1%	-	1%	<1%	<1%	-
Pretty place	3	<1%	-	1%	<1%	<1%	-
Arcades	3	<1%	<1%	1%	<1%	<1%	-
New to the area	2	<1%	<1%	-	<1%	<1%	-
Photography/Art	2	<1%	-	1%	<1%	-	1%
Ride bike	2	<1%	<1%	-	<1%	<1%	-
Prices	2	<1%	<1%	1%	-	<1%	<1%
Volks Electric Railway	2	<1%	1%	-	-	<1%	-
Music Festival	2	<1%	-	-	<1%	-	1%
You Tube	2	<1%	-	1%	<1%	<1%	<1%
Nice walks	2	<1%	1%	-	-	<1%	-
Social media	2	<1%	-	1%	<1%	<1%	<1%
Close to where we're staying	2	<1%	-	1%	<1%	<1%	-
Sporting Event	2	<1%	-	-	<1%	<1%	-
A gift	2	<1%	<1%	-	<1%	<1%	-
Near Seven Sisters	1	<1%	-	-	<1%	<1%	-

Funeral	1	<1%	-	1%	-	<1%	-
Free Parking	1	<1%	<1%	-	-	<1%	-
Alfie and Zoela bloggers	1	<1%	-	-	<1%	<1%	-
LGBT cultures	1	<1%	-	-	<1%	<1%	-
Good Pubs	1	<1%	-	-	<1%	-	<1%
Cheap train ticket	1	<1%	-	-	<1%	<1%	-
The Cliffs	1	<1%	-	-	<1%	-	<1%
House hunting	1	<1%	<1%	-	-	<1%	-
Using a gift voucher	1	<1%	<1%	-	-	<1%	-
Economic situation	1	<1%	-	1%	-	-	<1%
Vegan Scene	1	<1%	-	-	<1%	-	<1%
Appointment	1	<1%	<1%	-	-	<1%	-
Dog friendly city	1	<1%	<1%	-	-	<1%	-
Clean beach	1	<1%	<1%	-	-	<1%	-
Don't remember	*8*	*1%*	*1%*	*1%*	*1%*	*1%*	*<1%*