TSE RESEARCH

The Visitor Economy of Chichester

Building the evidence base

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1 Introduction

1.1 Evidence led decision-making

1.1.1 Chichester District Council is developing its vision for the City the wider district and this new vision will be at the heart of future economic and planning policy. Tourism is identified as a key growth area in the vision; latest figures show that tourism injects approximately £411.4 million pounds into the city and the wider district and sustains 14% of the total workforce.

1.1.2 To help the Council support the sector, Tourism South East's Research Unit (TSE Research) was commissioned to carry out an evidence collation exercise to provide the data and insights needed.

1.1.3 This report presents the findings of this research exercise.

1.2 Research activities

1.2.1 The project involved the following research activities.

1.2.2 **Industry audit:** A detailed review of open sources of business intelligence was carried out to pull together a database of all commercial visitor accommodation businesses and tourism attractions across the city. Open sources included the Non-Domestic Property Rates list, the Chichester BID business records list, the Valuation Office Agency website, holiday let websites, camping and caravanning websites and general internet searches.

1.2.3 A separate audit of accommodation and attractions was also carried out across the wider district to enable the Council to assess the scale of tourism supply in the city compared to the rest of the district.

1.2.4 **Economic impact of tourism:** The Cambridge Model was used to establish the volume and value of tourism in the district. The model calculates the value of tourism at district level through using a range of readily available local tourism data to disaggregate a range of regional/ county tourism statistics. As the level of analysis is at the district level, the model in its standard form is not able to separate out volume and value figures at city level.

1.2.5 **Economic impact appraisals of key city visitor attractions:** A modelling approach called PRIME was used to establish the economic importance of the Cathedral, Festival Theatre, Novium, and Pallant House to the local visitor economy. The model requires the input of a range of data about the attraction, including annual turnover, employment and visitor numbers to provide an estimate of the likely gross and net economic impacts arising from the attraction in terms of business turnover and jobs.

1.2.6 **Business survey:** A telephone survey was carried out with a sample of 252 tourism businesses from across the district to gather data on businesses performance. In addition to the core tourism businesses of visitor accommodation and attractions, the survey sample also included businesses from the wider hospitality sector including eateries, pubs and shops. Results are separately provided at city and wider district levels to enable the Council to assess performance in the city with that of the rest of the district. In total, 164 city tourism businesses and 88 wider district businesses provided feedback on trading levels, business confidence, key issues affecting performance and their perceptions of the city as a visitor destination.

1.2.7 **Visitor survey:** A face to face interview survey with a random sample of 889 visitors was carried out in the city centre to identify visitor profile, experiences of visiting the city and their perceptions of the city. The survey included both residents living in the city (PO19 postcode areas) and visiting the city centre area, and visitors living outside the city, including those who live in parts of the wider district.

1.3 Outline of report

1.3.1 Following the introduction, the results of the audit are presented in Chapter 2. Results of the Cambridge Model exercise are presented in Chapter 3 along with results of the PRIME modelling exercise.

1.3.2 The results of the business survey are presented in Chapter 4 and the results of the visitor survey are presented in Chapter 5.

1.3.3 In Chapter 6 we offer our concluding comments on key findings and implications for the Chi Vision.

2 Tourism business audit

2.1 Total tourism businesses

2.1.1 Based on data taken from the Inter-Departmental Business Register (IDBR)[1] there are a total of 6,355 businesses across the district. Tourism businesses account for 7.2% of all businesses in the district. Of this, 6.3% (401) are visitor accommodation businesses and around half of these are self-catering / holiday lets. Only 0.8% (54) businesses across the district are visitor attractions.

Table 1: Number and proportion of tourism businesses

	Number	**% of total**
Visitor accommodation		
B&Bs	82	1.3%
Camping and Caravan Site	42	0.7%
Guest Houses	1	0.0%
Group accommodation	24	0.4%
Hotel	12	0.2%
Pubs with rooms	35	0.6%
Self catering/holiday lets	202	3.2%
Serviced studios/ apartments	2	0.0%
Sub-total tourism businesses	*401*	*6.3%*
Visitor attractions		
Visitor Attraction, Gardens	4	0.1%
Visitor Attraction, Workplace Attractions	2	0.0%
Visitor Attraction, Museum / Art Galleries	10	0.2%
Visitor Attraction, Places of Worship	1	0.0%
Visitor Attraction, Museums / Art Galleries	7	0.1%
Visitor Attraction, Theatre	1	0.0%
Visitor Attraction, Activity operator	7	0.1%
Visitor attraction - Activity Operator	4	0.1%
Visitor Attraction, Wildlife Attraction	2	0.0%
Visitor Attraction, Farms	3	0.0%
Visitor Attraction, Leisure / Theme Parks	1	0.0%
Visitor Attraction - Racecourses & Tracks	1	0.0%
Visitor Attraction - Arts Centres	2	0.0%
Visitor Attraction, Historic Building/Houses/Other Properties	9	0.1%
Sub-total tourism businesses	*54*	*0.8%*
Total	**455**	**7.2%**

Table 2: Total number of business across district

Enterprises		
Micro (0 to 9 employees)	5,690	89.5%
Small (10 to 49 employees)	555	8.7%
Medium (50 to 249 employees)	95	1.5%
Large (250 plus employees)	15	0.2%
Total	6,355	100%

[1] *The Inter-Departmental Business Register (IDBR) contains information on VAT traders and PAYE employers in a statistical register which provides the basis for the Office for National Statistics to conduct surveys of businesses.*

2.2 Bedspace capacity

2.2.1 Visitor accommodation across the District has a capacity of almost 19,000 bed spaces. The sector with the greatest capacity is the caravan/camping/holiday park sector which has over 14,000 bed spaces (75% of all bed spaces across the District).

2.2.2 The serviced accommodation sector (Hotels, Guest Houses, B&BS, and pubs with rooms) provide 16% of total bed space across the District and 1,262 bed spaces (7% of the total) is provided by self-catering accommodation.

2.2.3 Chichester University also provides bed and breakfast accommodation from the end of June to first week of September each year. The Chichester campus offers a total of 456 single rooms to conference delegates and others staying overnight for business or other purposes. It also has a further 223 single room in its Bognor Regis campus site.

Table 3: Bed space capacity across Chichester District

	Rooms/Units/Pitches	Bed space
Serviced accommodation	1,874	3,060
Caravan/camping/holiday park accommodation	4,137	14,173
Self-catering/holiday let accommodation	281	1,262
Group accommodation	456	456
Total capacity	6,748	18,951

Figure 1: Bed space capacity by accommodation type

2.3 Tourism businesses in the City of Chichester

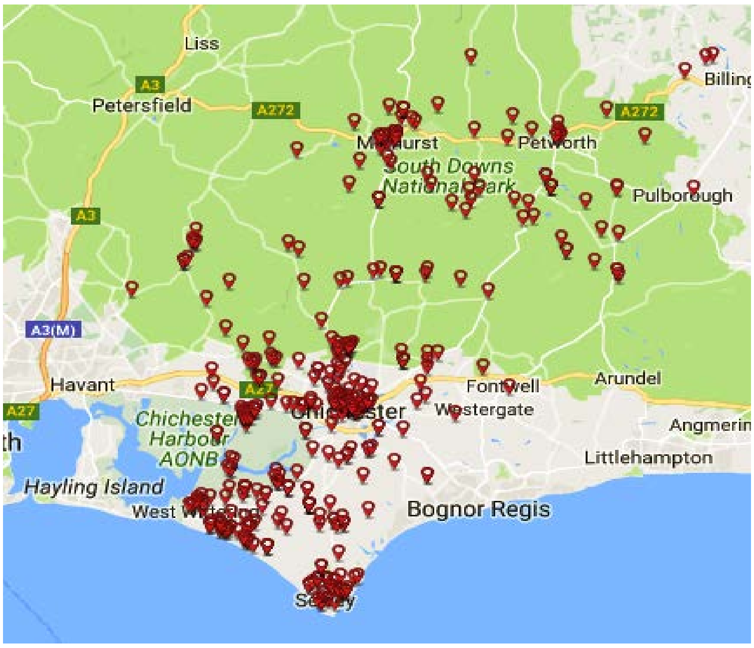
2.3.1 Of the 455 tourism business identified during this study, 77 accommodation businesses and 17 visitor attractions are located in the city. The IDBR does not publish results at tiers lower than Local Authority area so it is not possible to establish the size of tourism stock in relation to total businesses in the city.

2.3.2 However, for this study, the District Council did provide a list of all businesses paying business rates in the PO19 area which covers the city areas, and this established that there are 1,373 businesses paying business rates in the PO19 area. Whilst there are some types of businesses which do not pay business rates, e.g. farm buildings and businesses run from home, and thus will not appear on the list, it still provides a useful way for measuring the scale of tourism businesses in relation to total businesses in the city Based on the information available, tourism businesses in the PO19 area make up 6.8% of total businesses in this area.

2.4 Distribution of tourism businesses

Distribution of number of accommodation businesses

Figure 2: Map of accommodation across District

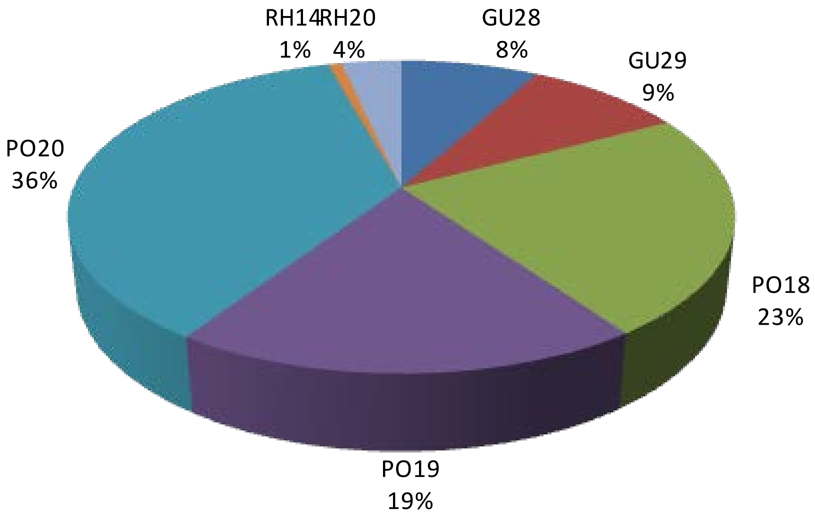


2.4.1 When we review the distribution of tourism business across the district, a fifth of visitor accommodation businesses are located in PO19 which covers the city boundary along with Fishbourne.

2.4.2 Well over a third (36%) of visitor accommodation businesses are located in PO20 which covers the towns and villages of Selsey, West Wittering, East Wittering, Tangmere, Oving, Westergate, and Eastergate.

2.4.3 PO18 which includes the towns and villages of Bosham, Boxgrove, Eartham, EastDean, Goodwood, Funtington, Nutbourne is home to a quarter (23%) of visitor accommodation businesses in the District.

Figure 3: Distribution of total accommodation by postcode sector



2.4.4 The rural towns of Petworth and Midhurst are home to 8% and 9% respectively of the District's visitor accommodation businesses. Smaller proportions of visitor accommodation businesses are spread across the remaining parts of the District.

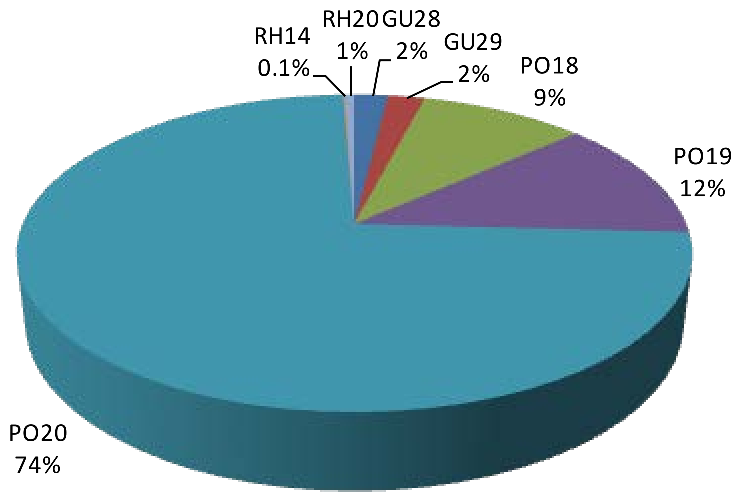
Table 4: Distribution of accommodation type by postcode sector

	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
B&Bs	10	12	20	19	13	1	7	82
Camping and Caravan Site	1	1	9	1	30	0	0	42
Group accommodation	0	0	0	1	0	0	0	1
Guest Houses	2	2	7	4	7	0	2	24
Hotel	0	3	2	5	2	0	0	12
Pubs with rooms	9	1	11	8	4	0	2	35
Self catering/holiday lets	10	18	43	37	89	2	3	202
Serviced studios/ apartments	0	0	0	2	0	0	0	2
Grand Total	32	37	92	77	146	3	14	401

Distribution of bed space capacity

2.4.5 Three quarters of total bed space across the District is in PO20. This heavy concentration is based on the fact that most of the District's camping, caravanning and holiday parks are based in the PO20 area and these include large sites like Bunn Leisure Holiday Park, Scotts Farm Caravan park, Holdens Farm Caravan Park, and White Horse Caravan Park.

Figure 4: Distribution of total bed space by postcode sector



2.4.6 A half (53%, 1,163 bed spaces out of 3,060) of all serviced accommodation bed space in Chichester District is located in the city/PO19 areas.

Table 5: Distribution of bed space by accommodation type by postcode sector

	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
B&Bs	37	62	100	107	71	4	39	420
Camping and Caravan Site	180	20	779	75	13,119	0	0	14,173
Group accommodation	0	0	0	456	0	0	0	456
Guest Houses	41	28	170	666	66	0	13	984
Hotel	0	187	335	718	73	0	0	1,313
Pubs with rooms	57	8	102	102	14	0	40	323
Self catering/holiday lets	56	93	303	195	590	14	11	1,262
Serviced studios/ apartments	0	0	0	20	0	0	0	20
Grand Total	371	398	1,789	2,339	13,933	18	103	18,951

2.4.7 Comparisons with other similar local authority areas, shows that the district has a similar number of serviced accommodation businesses and bedstock as Canterbury. It also shares with Canterbury a similar number of non-serviced accommodation and bedstock.

Table 6: Bed space capacity benchmark table

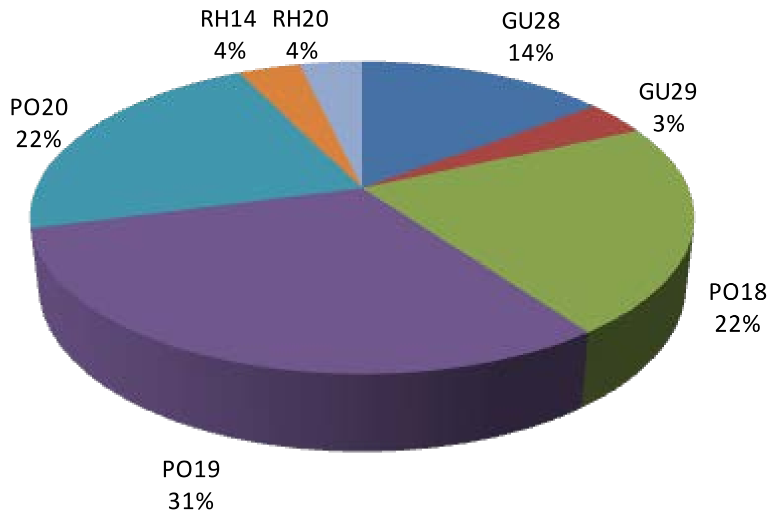
	No. of serviced accommodation businesses	No. of non-serviced accommodation businesses	Total bedspace capacity in serviced accommodation	Total bedspace capacity in non-serviced accommodation
Chichester	**155**	**245**	**3,060**	**15,891**
Bath	230	245	7,826	4,192
Canterbury	153	356	3,190	15,741
Exeter	89	68	5,941	6,055
Lewes	89	58	1,459	2,420
St Albans	45	7	2,145	31
Stratford on Avon	169	89	8,479	729
Winchester	180	59	5,110	4,220
York	250	201	10,581	4,274

Note: The comparative data is based on district boundaries for each local authority.

Distribution of visitor attractions

2.4.8 A third (17 attractions) of all visitor attractions are located in the City/PO19 area. A fifth are located in the PO20 area and a further fifth are located in the PO18 area.

Figure 5: Distribution of visitor attractions by postcode sector



2.4.9 The distribution across the district by postcode sector and type of attraction is presented in Table 7 overleaf.

Table 7: Distribution of visitor attractions by type by postcode sector

Postcode sectors	GU28	GU29	PO18	PO19	PO20	RH14	RH20	Total
Activity Operator	2		2					4
Arts Centres				2				2
Racecourses & Tracks			1					1
Activity operator			2	2	2	1		7
Farms					2	1		3
Gardens		1	1		1		1	4
Historic Building/Houses	3	1	1	3			1	9
Leisure / Theme Parks	1							1
Museum / Art Galleries	1		1	5	3			10
Museums / Art Galleries	1		2	3	1			7
Places of Worship				1				1
Theatre				1				1
Wildlife Attraction					2			2
Workplace Attractions			2					2
Grand Total	8	2	12	17	11	2	2	54

3 Economic importance of tourism

3.1 Volume and value of tourism – national and regional picture

3.1.1 Results from GBTS reveal that 102.7 million domestic overnight trips were taken in England in 2015, an increase of 10% compared with 2014. The value of domestic overnight trips increased by 8%, from £18 billion to £19.6 million in 2015. Reflecting the national trend, the volume and value of domestic overnight trips in the South East also increased in 2015 compared to 2014. The volume of domestic overnight trips increased by 5% and trip expenditure also increased by 5%.

3.1.2 According to results from IPS, overseas visitors made a total of 31.8 million overnight trips in England, an increase of 7% compared with 2014. Trip expenditure increased by 2% at the national level. Overseas visitor trip volume was also up for the region; total overnight trips taken by visitors from overseas to the South East increased by 11% and trip expenditure increased by 4%.

3.1.3 Figures published in the Great Britain Day Visits Survey (2015) indicate that there were 1.3 billion Tourism Day Visits undertaken in England during 2015 (down 3% compared to 2014). Despite a small drop in volume, spend per head was slightly up, leading to an increase in day trip expenditure of 1%. The picture at regional level was rather different; the region saw a far greater fall in tourism day trips in 2015 compared to 2014. Day trip volume at regional level dropped by 5% and day trip expenditure dropped by 12%.

3.1.4 Overall, total trip volume in the South East (overnight and day) dropped by 4% and total trip expenditure dropped by 6%.

Table 8: Tourism trip volume and expenditure: national and regional

Trips by domestic overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	17,040,000	16,200,000	5%	102,730,000	93,000,000	10%
Nights	45,560,000	43,700,000	4%	299,570,000	273,000,000	10%
Spend	£2,570,000,000	£2,448,000,000	5%	£19,571,000,000	£18,085,000,000	8%
Trips by overseas overnight visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	5,141,000	4,648,000	11%	31,820,000	29,824,000	7%
Nights	37,350,000	34,645,000	8%	241,427,000	232,846,000	4%
Spend	£2,242,000,000	£2,160,000,000	4%	£19,427,000,000	£19,081,000,000	2%
Trips by day visitors						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	216,000,000	227,000,000	-5%	1,298,000,000	1,345,000,000	-3%
Spend	£6,696,000,000	£7,571,000,000	-12%	£46,422,000,000	£46,024,000,000	1%
Total trips						
	South East			England		
	2015	2014	% change	2015	2014	% change
Trips	238,181,000	247,848,000	-4%	1,432,550,000	1,467,824,000	-2%
Spend	£11,508,000,000	£12,179,000,000	-6%	£85,420,000,000	£83,190,000,000	3%

3.2 Volume and value of tourism – Chichester

3.2.1 At destination level, tourism volume and value is monitored using tourism impact models. In West Sussex and across the South East, the Cambridge Model is used to help destinations track trends. Regular tracking has not been carried out for Chichester, and to establish a baseline, a new study was commissioned.

3.2.2 Based on the findings of the Cambridge Model, an estimated 571,000 overnight trips were taken to Chichester District in 2015 and overnight visitors spent approximately £132.3 million on their visit to the District. Day trips amounted to 5.6 million and generated a further £189.2 million in trip expenditure. In total, around £321.5 million was spent on trips to Chichester in 2015 by overnight and day visitors.

Table 9: Tourism trip volume and expenditure across District

	Total visitors	Total visitor expenditure
Domestic overnight visitors	447,701	£76,131,324
Overseas overnight visitors	123,352	£56,150,214
Day visitors	5,657,883	£189,240,307
Total visitors	6,228,936	£321,521,845

Note: Results based on 2015 Cambridge Model study

3.2.3 With the addition of multiplier expenditure and other trip-related expenditure, the total value of tourism activity across the District in 2015 is estimated to have been around £411.4 million.

3.2.4 This income to the local economy is estimated to have supported around 5,810 Full-Time Equivalent Jobs across the District. Many of these jobs are part-time or seasonal in nature and translate into an estimated 8,037 Actual Jobs. According to the Office of National Statistics, there were 56,900 employee jobs across the District in 2015. Based on these estimates, total tourism related expenditure supported 14% of these jobs.

Table 10: Total trip value (incl. Multipliers) across District

Total business turnover (incl. multiplier)	£411,429,000
Total jobs sustained	8,037
% of jobs in district	14%

Note: Results based on 2015 Cambridge Model study

3.2.5 Comparative data reveal that overall volume and value (see Table 9) is similar to Canterbury and Exeter.

Table 11: Tourism volume and trip expenditure benchmark table (1)

	Number of overnight domestic trips	Number of overnight overseas trips	Number of domestic day trips	Overnight domestic trip expenditure	Overnight overseas trip expenditure	Domestic day trip expenditure
Chichester	**447,701**	**123,352**	**5,657,883**	**£76,131,324**	**£56,150,214**	**£189,240,307**
Bath	803,000	236,000	5,680,000	£179,000,000	£103,132,000	£194,000,000
Canterbury	427,000	175,000	5,960,000	£58,000,000	£76,475,000	£178,200,000
Exeter	530,000	110,000	5,890,000	£85,000,000	£48,070,000	£221,680,000
Lewes	228,000	63,000	3,011,000	£31,191,000	£25,495,000	£90,077,000
St Albans	199,000	64,000	1,270,000	£16,000,000	£27,968,000	£38,000,000
Stratford on Avon	499,000	144,000	4,360,000	£98,000,000	£62,928,000	£131,000,000
Winchester	285,000	71,000	5,401,000	£48,261,000	£32,361,000	£193,609,000
York	1,250,000	223,000	10,320,000	£327,169,000	£313,758,000	£400,160,000

Note: The comparative data is based on district boundaries for each local authority.

Note: Visitor volume and expenditure data for other local authority areas comes from District level breakdowns we obtained from the national tourism surveys specifically for this exercise and not from Cambridge Model studies.

Table 12: Tourism volume and trip expenditure table (2)

	Total trip volume	Total trip expenditure
Chichester*	**6,228,936**	**£321,521,845**
Bath	6,719,000	£476,132,000
Canterbury	6,562,000	£312,675,000
Exeter	6,530,000	£354,750,000
Lewes	3,302,000	£146,763,000
St Albans	1,533,000	£81,968,000
Stratford on Avon	5,003,000	£291,928,000
Winchester	5,757,000	£274,231,000
York	11,793,000	£1,041,087,000

3.3 Economic impact of city attractions

3.3.1 There are 54 visitor attractions across the District, and 17 of these are based in the City/PO19 area. The main city centre based attractions are Chichester Cathedral, Festival Theatre, Pallant House, and The Novium.

3.3.2 A study of the economic impact of these attractions on the economy show that in together these attractions generate £15.7 million annually for businesses across the City, District and the wider region.

Table 13: Economic impact of city attractions

Expenditure	Chichester Cathedral	Festival Theatre	Pallant House	The Novium	Total
City	£5,213,920	£7,700,328	£1,258,170	£471,619	£14,644,037
Wider district and region	£454,414	£519,073	£87,480	£50,676	£1,111,643
Total	£5,668,334	£8,219,401	£1,345,650	£522,296	£15,755,681
FTE jobs					
City	78.5	87.7	21.1	7.1	194.4
Wider district and region	7.4	8.4	1.4	0.8	18.0
Total	85.8	96.2	22.5	7.9	212.4

Chichester Cathedral:
Generates £5.6m/Sustains 85.8 FTE jobs

Festival Theatre:
Generates £8.2m/Sustains 96.2 FTE jobs

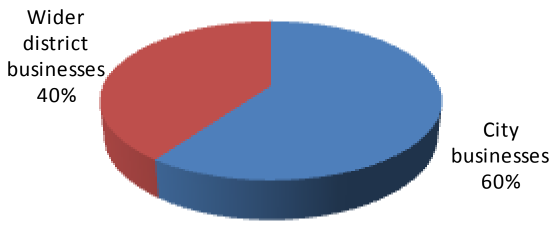
Pallant House:
Generates £1.3m/Sustains 22.5 FTE jobs

The Novium:
Generates £522,300/Sustains 7.9 FTE jobs

4 Tourism business survey

4.1 Respondent business profile

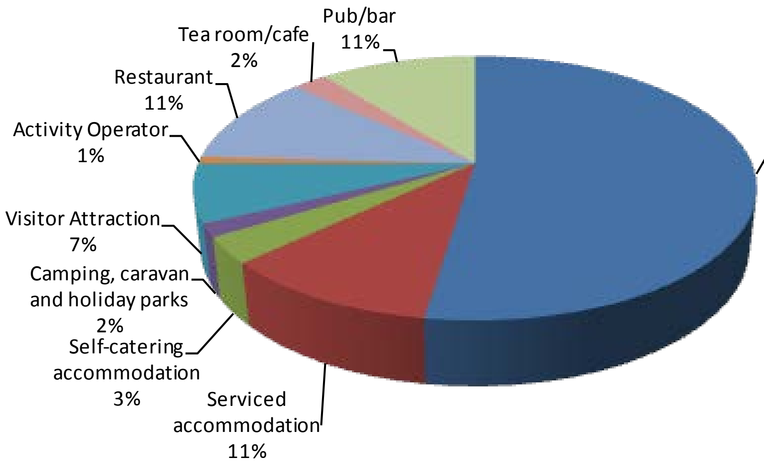
Figure 6: Distribution of business sample by city and wider district



4.1.1 Tourism and hospitality businesses from across the district were contacted by phone and invited to take part in a survey to find out about their trading levels and city businesses are additionally asked about their perceptions of the city.

4.1.2 In total, 252 businesses took part in the survey. 60% were city businesses and 40% were businesses operating elsewhere in the district. Around half of the sample was made up of retail businesses and many of these were shops based in the city.

Figure 7: Distribution of business sample by business type



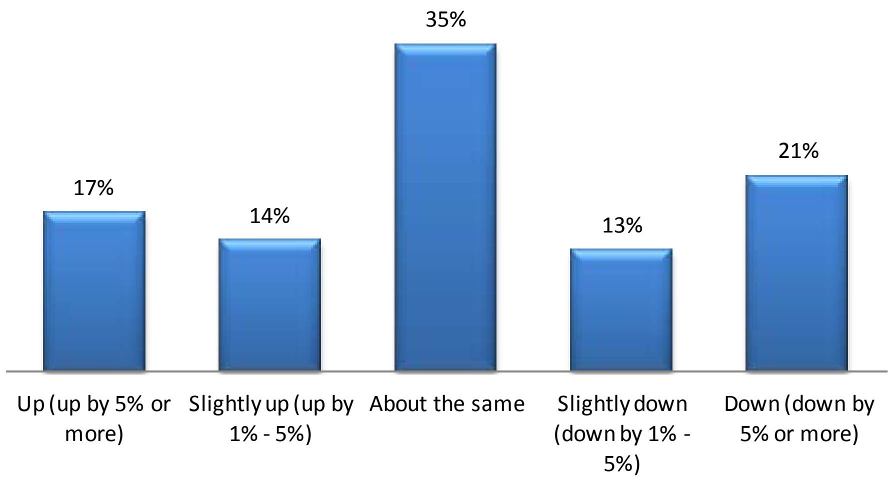
4.1.3 Around half of the sample was made up of retail businesses and many of these were shops based in the city (65% of all the retail businesses taking part in the survey were based in the city).

Figure 8: Distribution of business type by city and wider district

4.2 Business performance

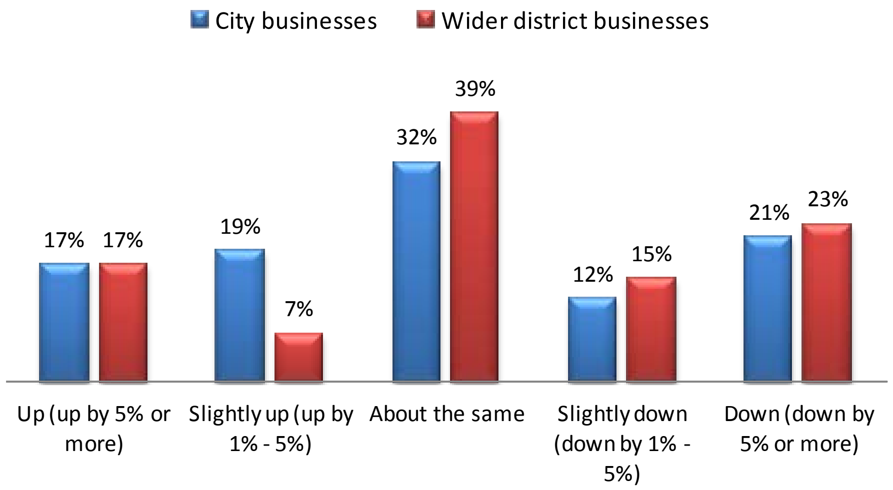
4.2.1 Feedback from businesses on trading levels from the start of the year to end of July compared to the same period last year, reveals that around a third (31%) saw performance go up or slightly up, another third (35%) experienced no significant change, and a third (34%) saw performance go down or slightly down.

Figure 9: Business performance Jan to Jul 2016 compared to last year



4.2.2 Results split between city and wider district businesses reveal that performance was generally higher among city businesses.

Figure 10: Business performance Jan to Jul 2016 compared to last year by city and wider district



4.2.3 Results by business type are presented in Table 11 below. However, it is not possible to draw any clear cut insights as the samples for some business types are very small.

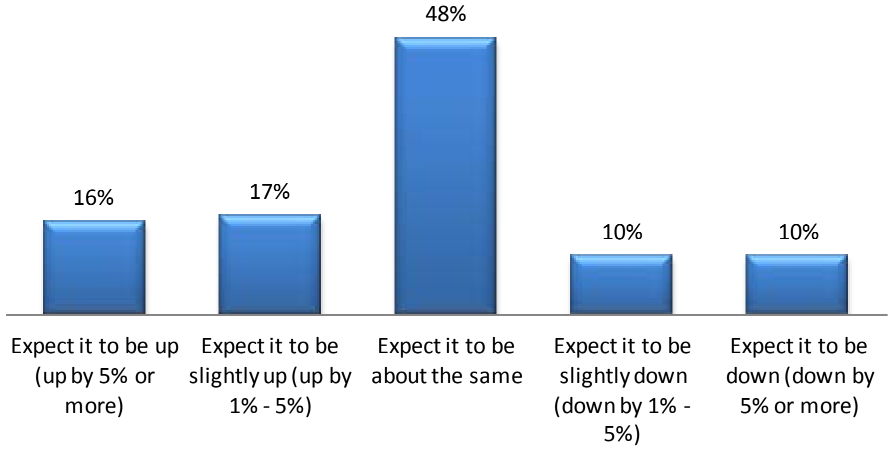
Table 14: Business performance Jan to Jul 2016 compared to last year by business type

Performance has been:	Retail	Serviced accommodation	Self-catering	Camping/caravan	Visitor Attraction	Activity Operator	Restaurant	Tea room/cafe	Pub/bar
Base	132	27	8	4	18	2	28	6	27
Up	14%	15%	13%	25%	28%	50%	21%	0%	22%
Slightly up	17%	7%	0%	0%	6%	0%	21%	33%	4%
About the same	29%	33%	25%	50%	61%	50%	36%	33%	44%
Slightly down	17%	15%	13%	0%	0%	0%	11%	0%	11%
Down	23%	30%	50%	25%	6%	0%	11%	33%	19%

4.3 Expectations for rest of year

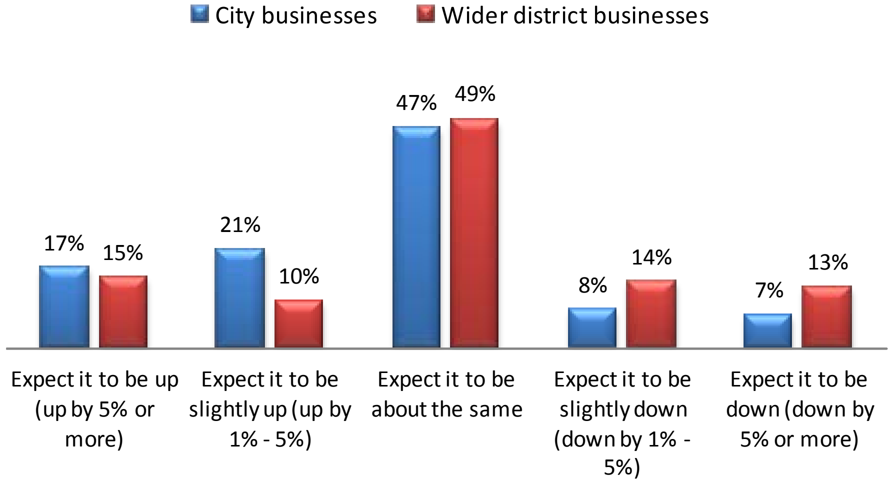
4.3.1 Looking ahead to the rest of the year, just under half (48%) of all businesses expect performance to be similar to the year before.

Figure 11: Expectations of business performance for the rest of the year



4.3.2 The same results split between city and wider district businesses reveal that city businesses are generally more optimistic about the year ahead.

Figure 12: Expectations of business performance for rest of this year by city and wider district



4.3.3 Results by business type are presented in Table 12 below. As indicated earlier, caution needs to be applied in the interpretation of the results given the small samples for some business types.

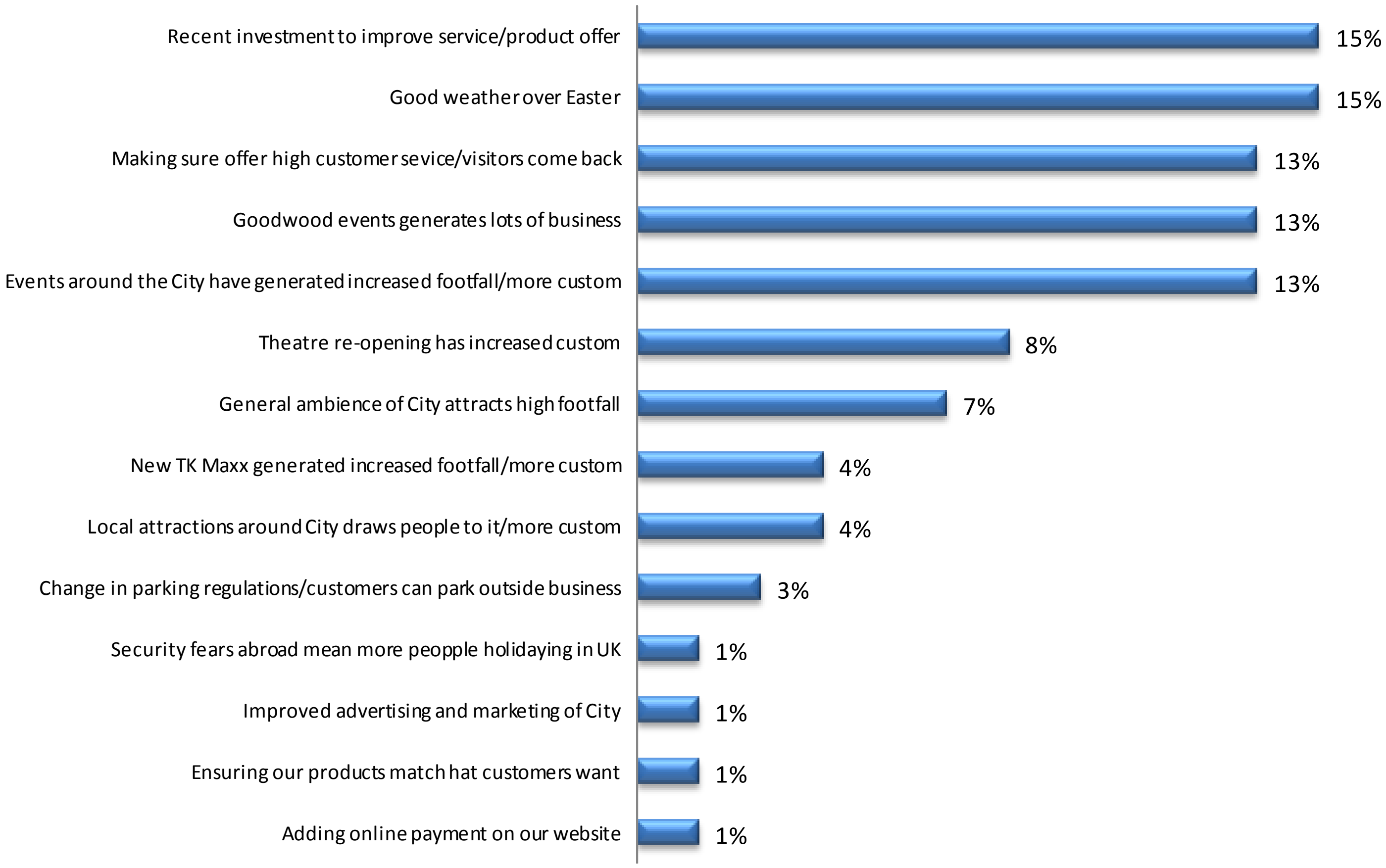
Table 15: Expectations of business performance for rest of this year by business sector

Expect performance to be:	Retail	Serviced accommodation	Self-catering	Camping/caravan	Visitor Attraction	Activity Operator	Restaurant	Tea room/cafe	Pub/bar
Base	132	27	8	4	18	2	28	6	27
Up	14%	7%	0%	25%	11%	50%	36%	17%	19%
Slightly up	20%	15%	38%	0%	11%	0%	14%	0%	7%
About the same	47%	59%	13%	25%	67%	0%	39%	50%	52%
Slightly down	9%	11%	25%	50%	11%	0%	4%	17%	11%
Down	10%	7%	25%	0%	0%	50%	7%	17%	11%

4.4 Main factors behind increase in performance

4.4.1 Recent investments in the business and good weather over Easter were to two main factors mentioned the most often by businesses for the improvement seen in performance since the start of the year.

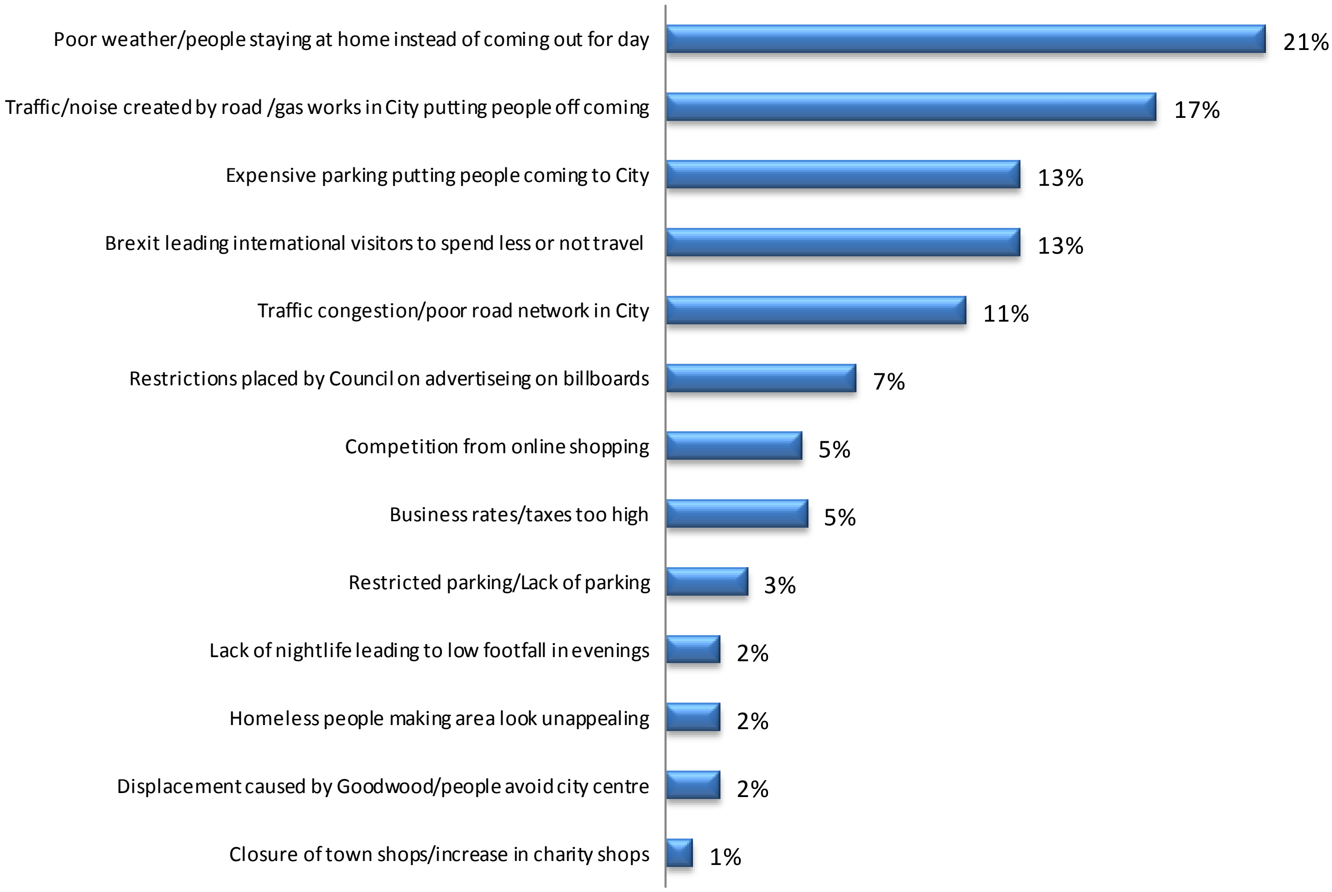
Figure 13: Main factors behind increased in performance



4.5 Main factors behind drop in performance

4.5.1 With the exception of good weather over parts of the Easter period, the country generally experienced an unseasonably cold spell up to May and the month of June is claimed by some to have been the wettest June since records began. July too experienced unsettled weather conditions for much of the first half of the month, with a short hot spell between the 17th and 23rd. In view of this, it is not surprising to see that a fifth of businesses blamed the weather on a fall in trade over the first six months of the year.

Figure 14: Main factors behind drop in performance



4.6 Key issues likely to affect future trade

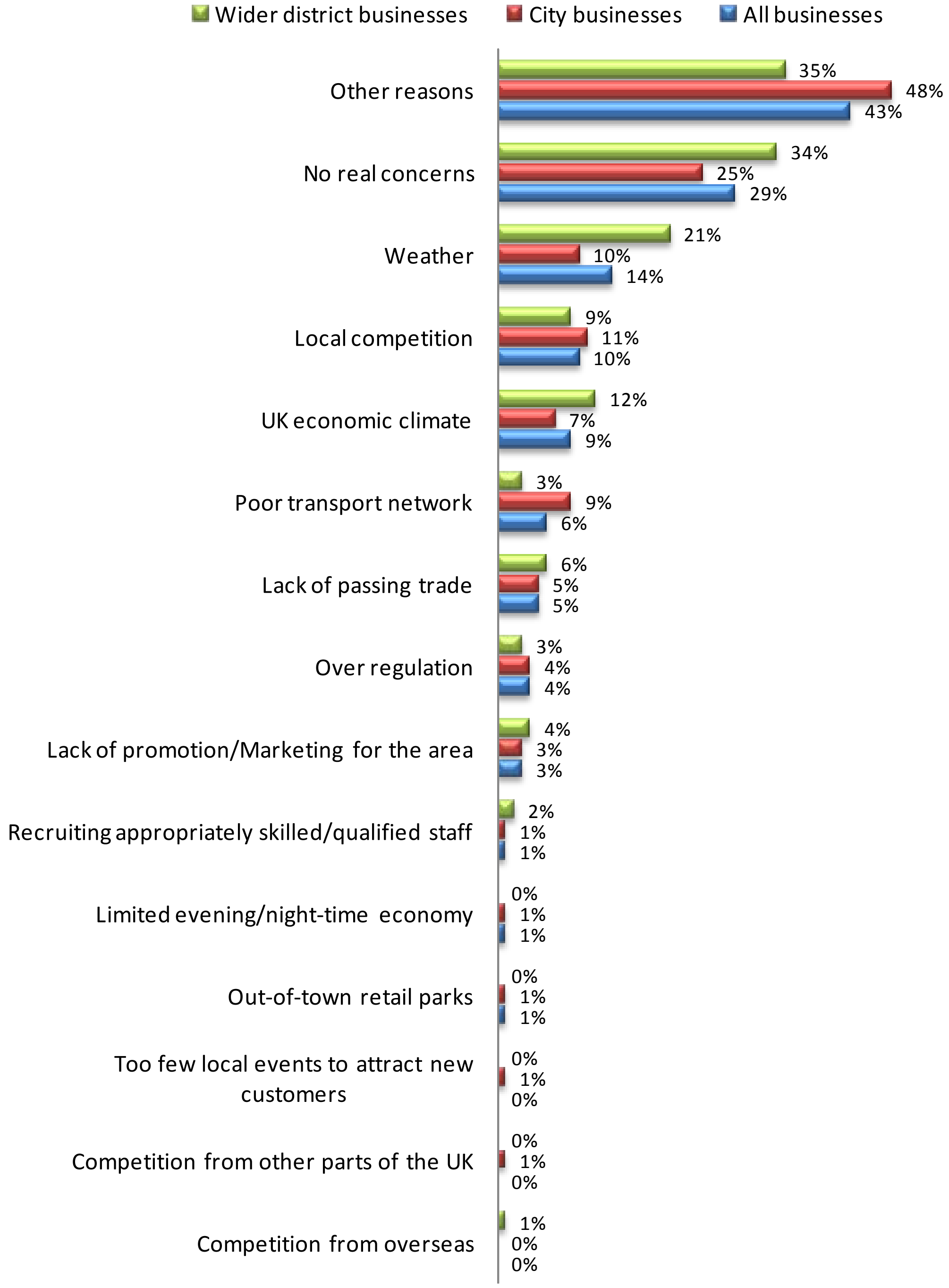
4.6.1 Businesses were asked about the key issues they felt would affect the future performance of their business. To help manage responses a number of possible factors affecting performance were presented on a list and businesses were asked to select those that applied to them.

4.6.2 Just under a third of all businesses (29%) replied that there were no specific issues they could see which would affect their future performance.

4.6.3 Overall 14% of businesses replied that they are affected by weather conditions and would continue to be so in the future. The proportion is higher for wider district businesses where more are outdoor attractions and camping/caravanning parks which are more seasonal in their operations are located. Local competition and the state of the UK economic climate are factors which 1 in 10 businesses believe will affect their future performance.

4.6.4 Overall 5% of businesses believe that a lack of passing trade will affect future performance. The main reason for the lack of passing trade among city businesses is the belief that fewer people will visit the city centre in the near future as a result of more online shopping and out of town shopping centres. Other reasons blamed for the lack of passing trade is the perceived lack of parking for visitors and expense of parking.

Figure 15: Key issues believed to affect current and future business performance



4.6.5 Overall, a third of businesses (87 out of the 252, 35%) felt that there were 'other' factors which would impact on future performance. Verbatim responses were taken and the analysis of these reveals that a fifth feel that the cost of parking in the city would put visitors off coming.

4.6.6 The EU referendum took place during the survey period and the immediate impact was very strong for a proportion of tourism and hospitality businesses; 14% of those businesses providing ‘other’ responses felt that leaving the EU could lead to economic uncertainty, as a result of existing customers spending less and fewer new visitors from EU member countries.

4.6.7 An equal proportion also felt that the disruption to trade caused by the ongoing road works on A27 was affecting current performance and would do so until the road works were completed.

4.6.8 The perceived high costs of business rates and business rents and the traffic congestion in and around the city were also other factors affecting trading levels mentioned by a number of businesses.

Table 16: ‘Other’ issues believed to affect current and future performance

Expensive parking which is putting visitors coming into the city centre	20%
Impact of Brexit/creating uncertainty/could be fewer foreign visitors	14%
The ongoing road/gas works which is causing significant disruption	14%
High cost of business rates and rents	13%
Traffic congestion in and around city and on A27 putting people coming to city	10%
Competition from online retailers	8%
Council forcing us to remove our front of building A frame advertising	8%
Lack of parking in this area/nowhere convenient to park so customer don’t stop	6%
Absence of a nightlife means footfall is very low in the evenings	1%
Customers are becoming more demanding/struggling to meet those demands	1%
Lack of large department stores which draw people to the city centre	1%
Lack of signage - people don't know we are here	1%
Large out of town events like Goodwood Festival take people away from the city centre	1%
Rising staffing costs	1%
The amount of homeless people on street which is putting people off visiting city centre	1%

Note the responses in Table 16 are based on the 35% of businesses which mentioned ‘Other’ issues.

4.7 Changes seen in profile of customers

4.7.1 Business were asked if they had seen any changes in their customer base in recent years. The vast majority, 87% reported that no significant changes had been observed.

4.7.2 Among the 13% of businesses who had experienced changes, a third observed that customers have been generally spending less than they use to.

Table 17: Changes seen in customer profile

Base	33
Customers generally spending less than they use to	32%
fewer young visitors/students	14%
customers getting more demanding	11%
Customers getting younger	11%
Fewer foreign customers	7%
B&Bs old fashioned for young/customers are now 50 plus	4%
Customers expect us to stay open for longer/open in evenings now	4%
More customers from London	4%
More customers shopping with us online	4%
More last minute bookings/customers leaving it until last minute	4%
More retired customers	4%
More wedding business	4%

Note low sample – only 33 businesses

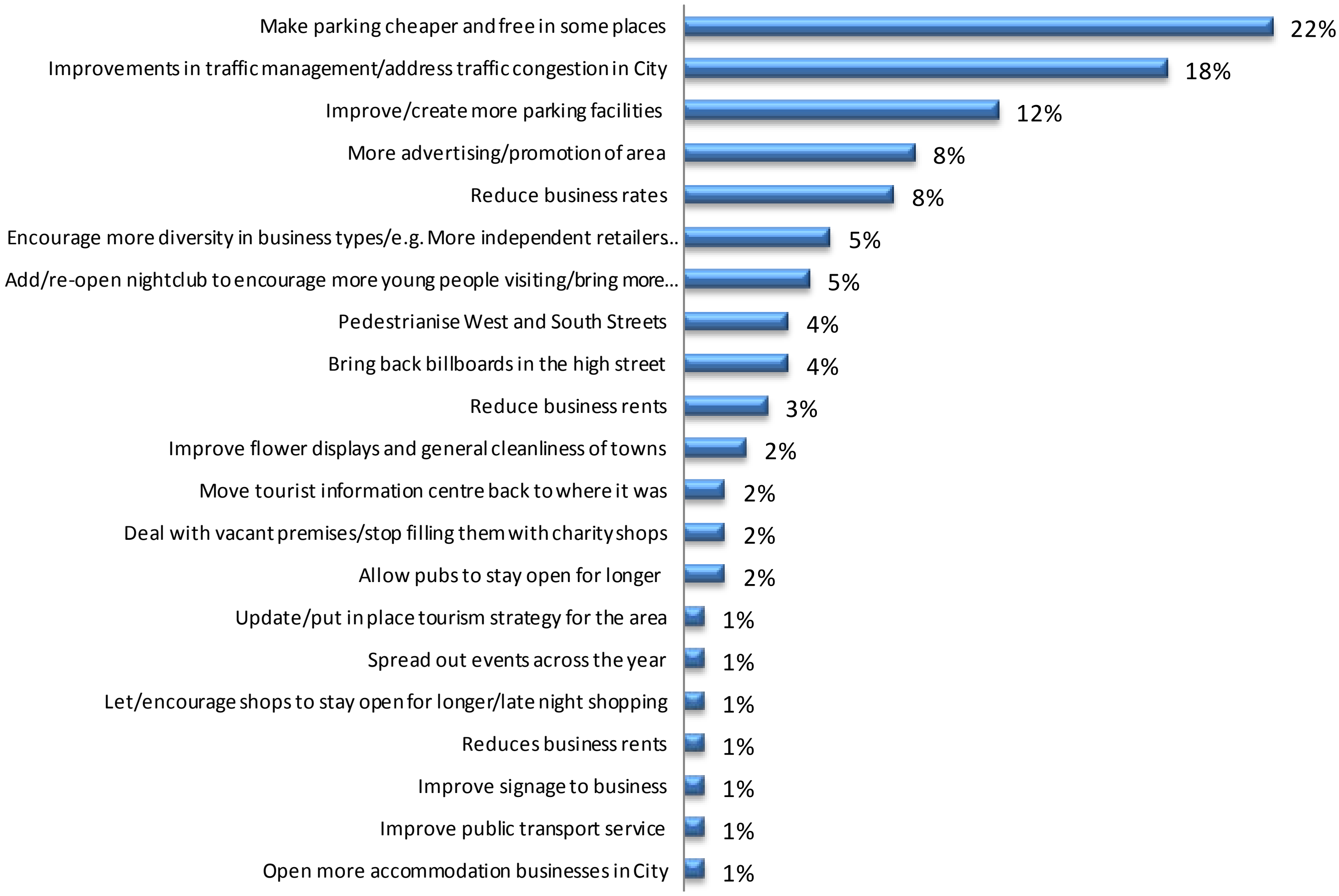
4.8 Key changes businesses would like to see implemented

4.8.1 Businesses were asked which changes if implemented they believed would improve the performance of their own business and the local economy more generally.

4.8.2 A fifth believe that making parking cheaper and free in some places would encourage more visitors to the area and by improving footfall would enhance the opportunities for more trade.

4.8.3 Just under a fifth wanted to see improvements to managing traffic and improving the road network to address the traffic congestion and bottlenecks seen at particular times of the day.

Figure 16: Key changes business would like to see implemented



4.9 Business perceptions of Chichester City

4.9.1 City businesses were asked a specific set of questions about their perceptions of the city. They were asked what they thought were the best and worst things about the city. This was an ‘open-ended’ question and the verbatim results were analysed and grouped into specific areas. The results presented in Fig. 17 and Fig. 18 have been weighted by the frequency in which they were mentioned to reveal the aspects of the city that are seen to be the most important.

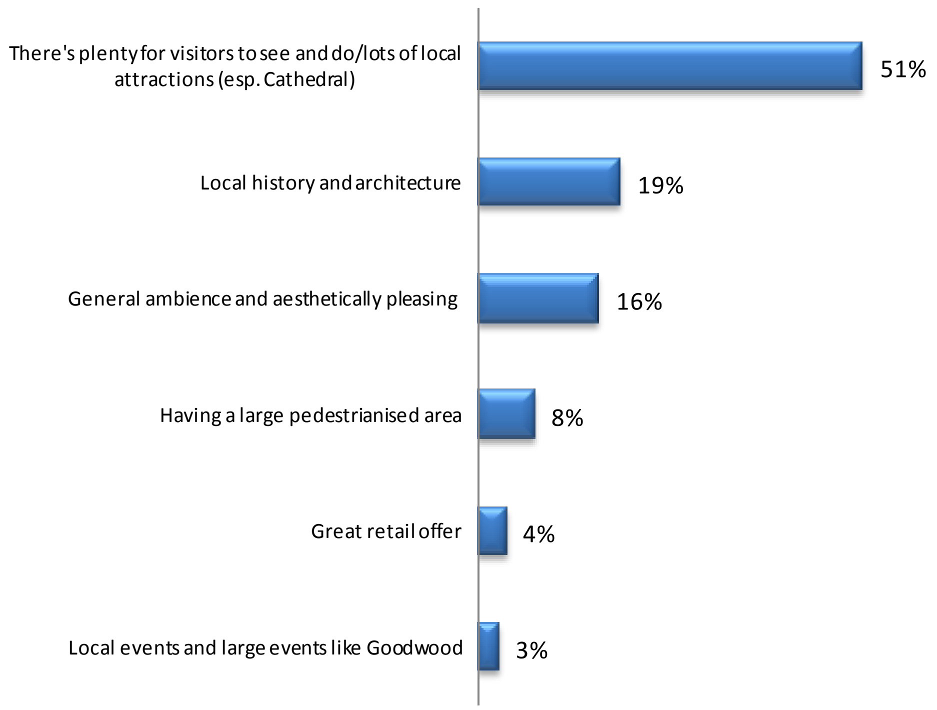
4.9.2 From the perspective of city businesses, the wide range of things to do and see in and around the city was the top ‘best’ thing about the city. Mentioned by a half of all city businesses, this aspect was seen as a positive feature that benefited everyone visiting the city – both locals and tourists. Many references were made to city attractions, particularly the Cathedral and the range of events.

> *There's a cinema and a gym and good historical things to visit, it's got everything a tourist would want really.*

> *The best things are the tourist attractions. The Cathedral is a big draw. The Festival Theatre and Goodwood motor circuit always bring people in.*

> *The Cathedral, the Festival Theatre, Pallant House, its proximity to the coast and South Downs, and easy access to London.*

Figure 17: Best things about the city



4.9.3 For a fifth of city businesses, the heritage and historical architecture of the city is the best thing about the city. Other ‘best’ things mentioned were the ambience and attractiveness of the city (mentioned by 16% of businesses), the advantages offered to visitors and shoppers of a large pedestrianised area, making it easy to get around on foot (mentioned by 8% of businesses), the diverse and high quality shops (mentioned by 4% of businesses) and the hosting of local events and large events like Good Festival (mentioned by 3% of businesses).

4.9.4 When businesses were asked what they thought was the worst thing about the city, a wider range of responses was provided. The most frequently mentioned aspect was the view that the city suffers from very heavy traffic congestion which many felt acted as a deterrent to people visiting the city.

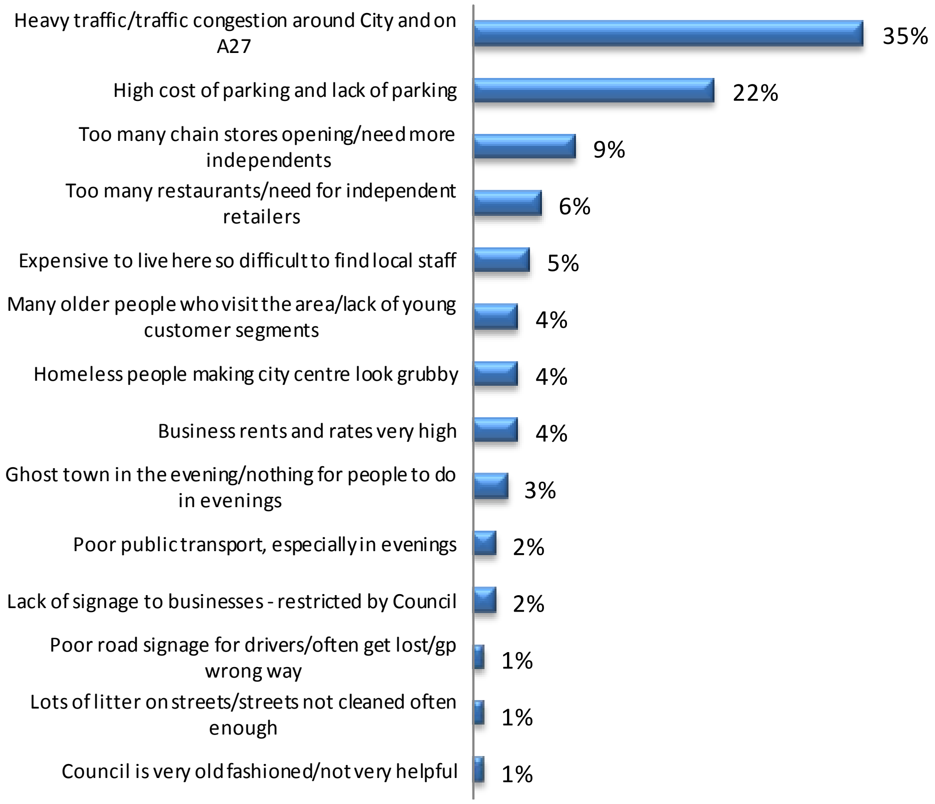
4.9.5 The perceived high cost of parking, a view which was often combined with the opinion that the city lacked adequate parking provision was the second most ‘worst’ thing about the city (mentioned by a fifth of businesses).

The A27 is a nightmare. It is always snared up. It needs to be more fluid and they need to stop talking and put their plans to tackle it into practice.

The main issue is getting people into the city. The A27 is not fit for purpose anymore and so it makes it very hard to get in and out of Chichester.

The car parking is very bad. It’s too expensive and inconvenient.

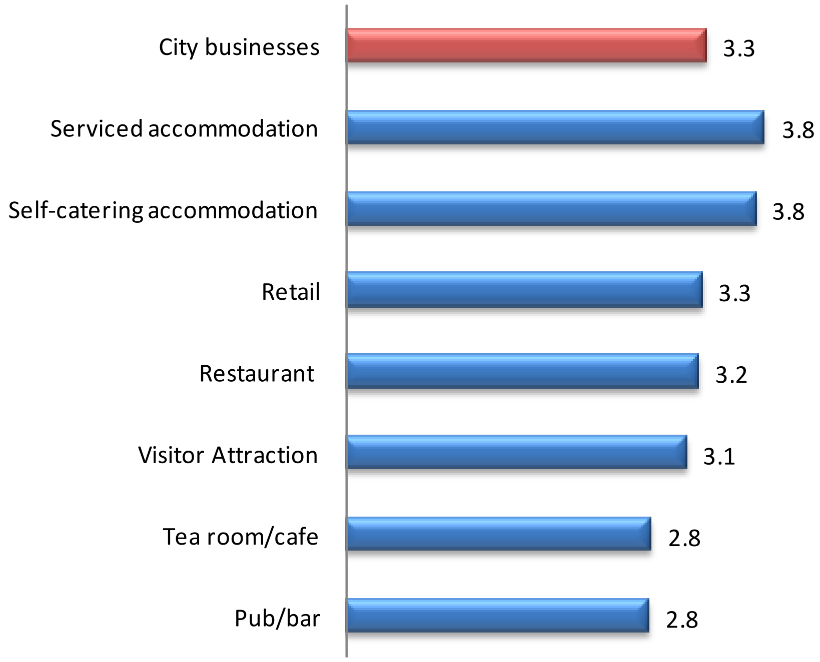
Figure 18: Worst things about the city



4.9.6 The final perception question posed to businesses was where on a scale of ‘vibrancy’ (ranging from 1 to 5) did they think Chichester City sits. The scale was ‘Behind the times/old fashioned’ at one end of the scale (rating of 1) and ‘vibrant and cosmopolitan’ is at other (rating of 5).

4.9.7 The overall average rating score provided by city businesses was 3.3 out of 5, indicating that most felt that the city sat somewhere in the middle of the vibrancy scale. Results by sector show that serviced accommodation businesses tend to see the city as being more cosmopolitan and vibrant than the other business types.

Figure 19: Vibrancy rating scale



5 Visitor survey

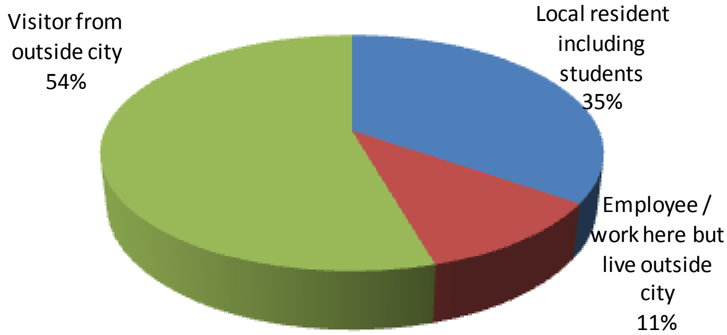
5.1 Visitor profile

Type of visitor

5.1.1 Just over half of the visitor sample is made up of visitors who live outside the City of Chichester (54%). Local residents including students living in the city (35%) and employees who work in the city but live elsewhere (11%) make up the other half.

5.1.2 The sample for employees is too small to provide separate results so for clarity and ease of reporting, residents, including students living in the city and employees are grouped together as 'Residents' in the tabulated results.

Figure 20: Type of visitor



Visitor origin/normal place of residence

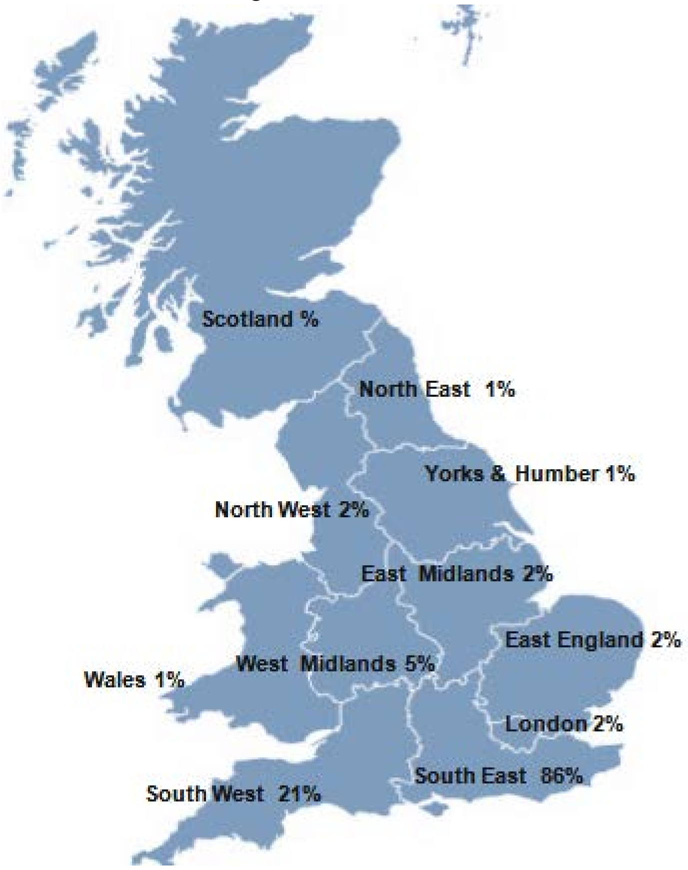
5.1.3 Among visitors from outside the city, the vast majority (95%) came from other parts of the UK and half of these come from Sussex and a quarter come from Hampshire. At regional level, 86% of visitors are from the South East.

5.1.4 At town level, around a fifth of city visitors were found to come from neighbouring towns within the district, mainly the PO20 and PO18 postcode areas of Selsey, West Wittering, East Wittering, Tangmere, Oving, Westergate, Eastergate, Bosham, Boxgrove, Eartham, East Dean, Goodwood, Funtington, and Nutbourne (see Appendices for a full list of towns).

Table 18: Top ten counties domestic visitors come from

	486
Sussex (East and West)	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%

Figure 21: Region of residence among domestic visitors



5.1.5 A relatively small proportion of visitors were from overseas and the main countries of residence are Australia, the USA and Germany. At only 5%, this is lower than a number of other historic cities, and lower than the 10% of overseas visitors found to make up the visitor market during the previous visitor survey in 2008. The proportion is, on the other hand, the same as that found in the 2005 visitor survey. In light of this, the proportion of overseas visitors appears to have returned to the 2005 level. We should highlight, however, that the 2005 visitor sample was only 223 and therefore, will carry a relatively high margin of error.

Table 19: Trends in proportion of overseas visitors

	% of overseas visitors
2016	5%
2008	10%
2005	5%

Source: City level visitor surveys carried out by TSE Research

Table 20: Proportion of overseas visitors in other historic cities

	% of overseas visitors
Bath	28%
Oxford	42%
York	15%

Source: 2015 vsurveys identified from open sources

Visitor age

5.1.6 The age profile of visitors is older than residents; 59% are aged 55 years and over compared to 38% of residents. Visitors to the city are also more likely to be retired than visitors who are city residents.

Table 21: Visitor age profile

	Overall	Resident	Visitor
Base	892	405	487
0-15 years	3%	1%	4%
16-24 years	14%	19%	9%
25-34 years	14%	20%	10%
35-44 years	9%	9%	9%
45-54 years	16%	15%	16%
55-64 years	18%	12%	23%
65+ years	32%	26%	36%

Table 22: Proportion of retired visitors

	Overall	Resident	Visitor
Base	892	404	488
Yes	30%	23%	36%
No	70%	77%	64%

Group size and composition

5.1.7 Two thirds of local residents visit the city centre on their own. A third of visitors from outside the city also visit on their own and another third visit with their partner/spouse.

Table 23: Group composition

	Overall	Resident	Visitor
Base	891	404	487
By myself	49%	69%	33%
With family	16%	12%	20%
With partner/spouse	24%	11%	34%
With friends and family	4%	3%	5%
With friends	6%	4%	8%
Work colleague/Business associate	0%	1%	0%

5.1.8 The average group size among visitors is 1.9 people.

Figure 22: Average visitor group size

Visitor socio-economic status

5.1.9 A quarter of resident and non-resident visitors to the city are from AB occupational grades (this includes retired people as the grade is based on their previous occupations). The AB grade consists of higher and intermediate managerial, administrative or professional level occupations.

5.1.10 The largest group come from the C1 grade which is made up of supervisory, clerical, and junior managerial and junior administrative occupations (42% overall, 45% residents and 40% visitors), and a further quarter are from the C2 occupational group (skilled manual works).

5.1.11 The DE occupational group which is made up of semi-skilled and unskilled manual workers, pensioners, and others who depend on the welfare state for their income make up 10% of city visitors.

Table 24: Visitor occupational grade

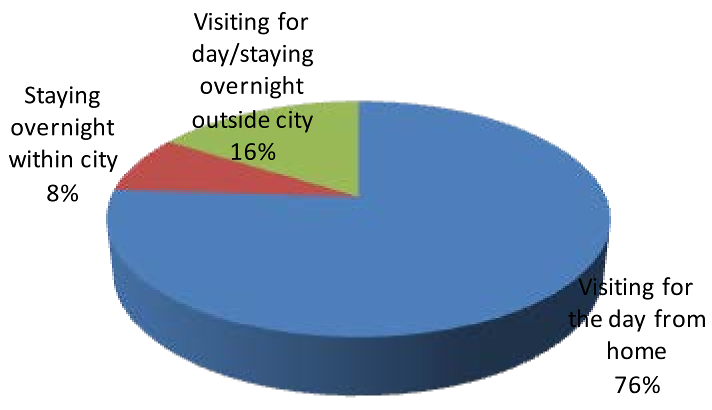
	Overall	Resident	Visitor
Base	856	388	468
AB	24%	24%	25%
C1	42%	45%	40%
C2	22%	16%	25%
DE	12%	15%	10%

5.2 Trip features

Day and overnight tourist visitors

5.2.1 The vast majority of visitors are on a day trip; 76% are visiting from their homes and a further 16% are visiting for the day whilst staying overnight outside the city during holiday and other purposes. Only 8% of visitors were found to be staying overnight in the city. This low in comparison to a number of other historic cities and a fall on the 13% found to be staying overnight in the city in 2008[2].

Figure 23: Proportion of day and overnight visitor



[2] *The earlier 2005 study found that 37% of visitors were staying in the city. However, as we have established the survey was based on a sample of only 223 visitors and the interviewing period also stretched all the way to October. In view of the small sample and different survey period, the results are not directly comparable and will contain a high margin of error and are not reliable to use for trend purposes.*

Proportion of overseas visitors in other historic cities

	% of overnight visitors
Bath	56%
York	49%

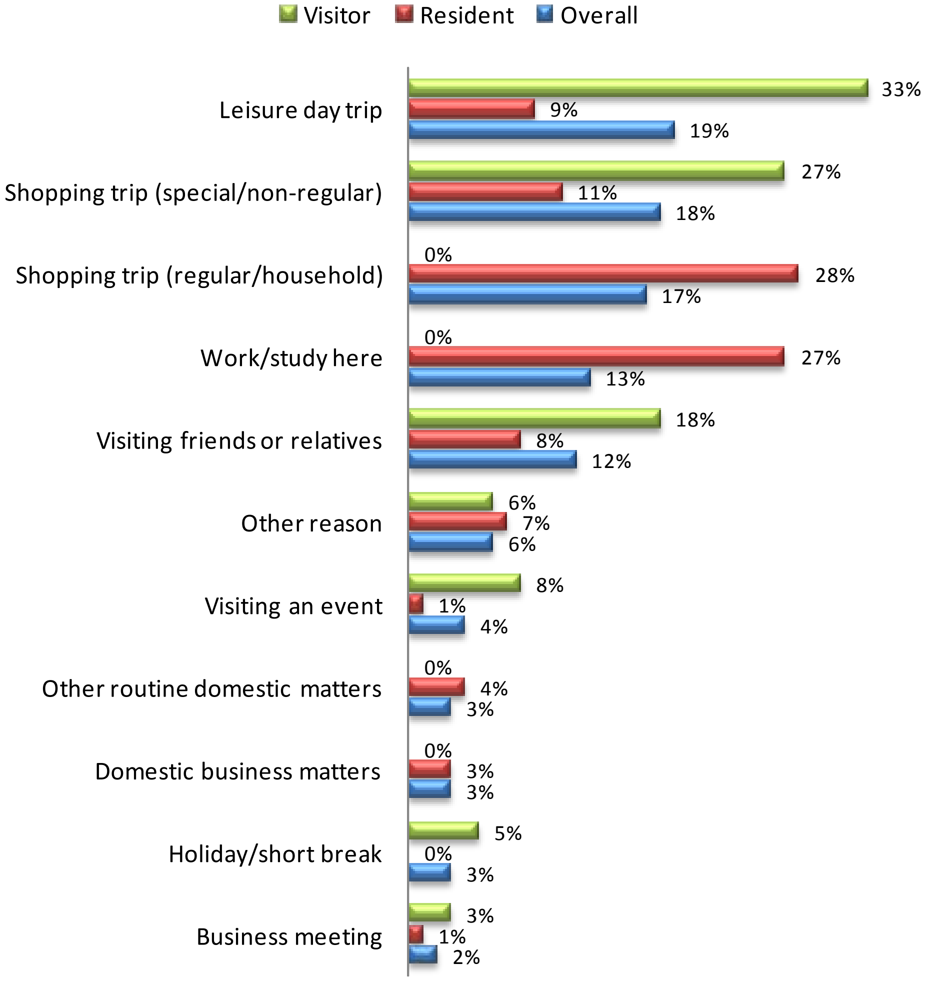
Source: recent surveys identified from open sources

Main reason for visiting

5.2.2 The survey found that there are two main reasons why visitors from outside the city visit the city; these are a leisure day out (33%) and a special shopping trip (27%).

5.2.3 The main reasons residents visit the city centre are to do their regular domestic shopping or because they live, work or study in the city centre area.

Figure 24: Main reasons for visiting



Length of stay

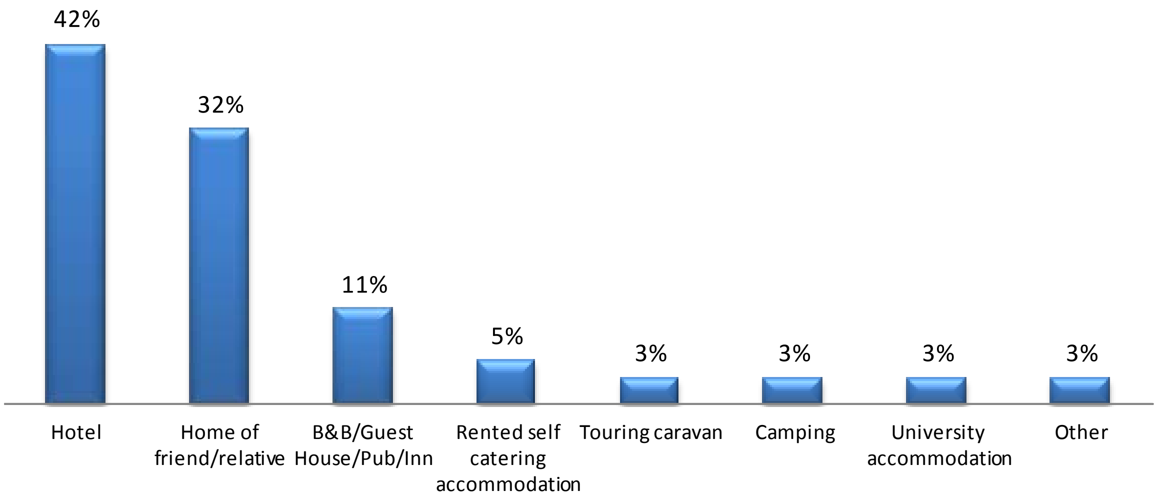
5.2.4 Day visitors spend on average 3.4 hours on their trip to the city and overnight visitors staying in the city spend on average 3.9 nights on their trip.

Figure 25: Average length of stay

Accommodation used

5.2.5 The types of accommodation used the most often by overnight visitors are hotels (42%) and the home of friends or relatives (32%).

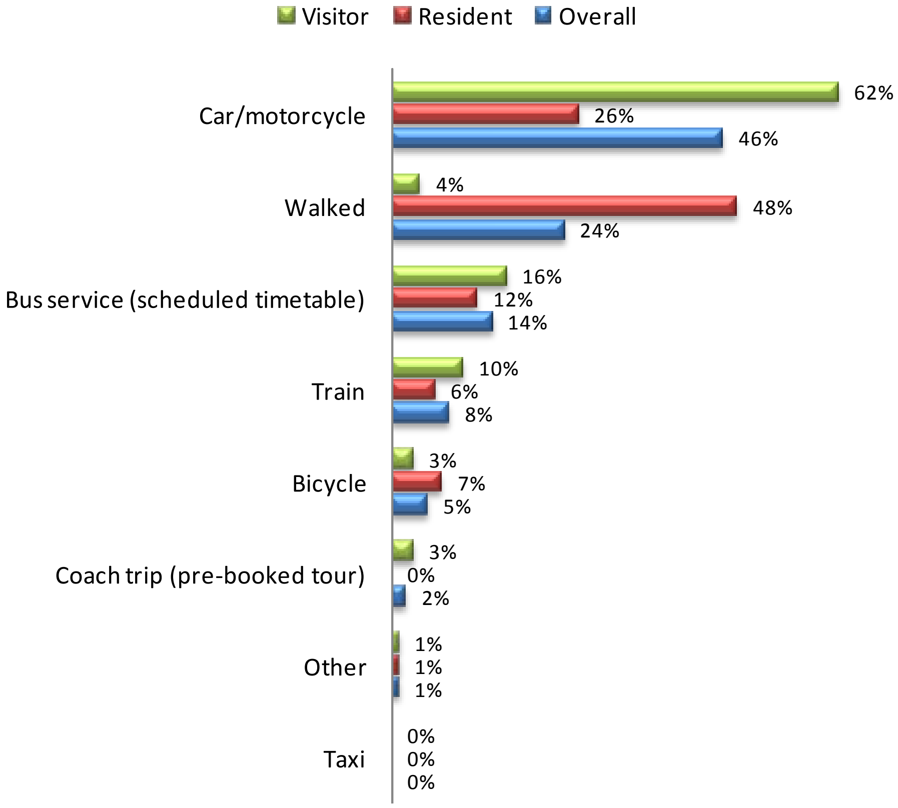
Figure 26: Type of accommodation used



Main mode of transport used to travel

5.2.6 The car is the most common mode of transport used to reach the city among visitors (62% of visitors travel by car). Residents are more likely to walk from their home in the city to the city centre (48% of residents walk), though a quarter travel to the city centre by car.

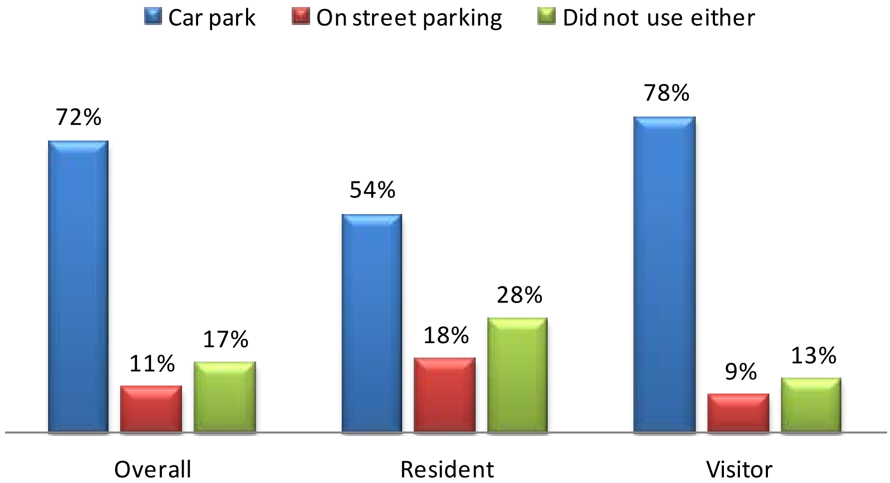
Figure 27: Type of accommodation used



Use of car parks

5.2.7 Three quarters of all visitors and just over a half of all residents who travelled by car used one of the city centre car parks during their visit.

Figure 28: Use of city parking



5.2.8 A wide range of city centre car parks were used, however, the two used most commonly used were Northgate and Cattle Market.

Table 25: City car parking used

	Overall	Resident	Visitor
Base	288	55	233
Northgate	26%	22%	27%
Cattle Market	23%	31%	21%
Avenue De Chartres	13%	13%	12%
Can't recall	8%	11%	8%
East Pallant/Cawley Priory	5%	4%	5%
New Park Road	4%	0%	5%
Little London	3%	4%	3%
Basin Road	3%	4%	3%
Baffins Lane	2%	2%	3%
Orchard Street	2%	2%	2%
St Cyriacs	2%	0%	3%
Market Road	2%	4%	2%
Westgate	2%	2%	3%
South Pallant	1%	4%	1%
Market Avenue/St John's Road	1%	0%	2%
Market Avenue/South Pallant	1%	0%	1%

Frequency of visits

5.2.9 As may be expected, frequency of visits to the city centre is relatively high among local residents with three quarters visiting the city centre every day.

5.2.10 Among visitors from outside the city, a fifth were found to be visiting the city centre for the first time.

Table 26: Frequency of visits

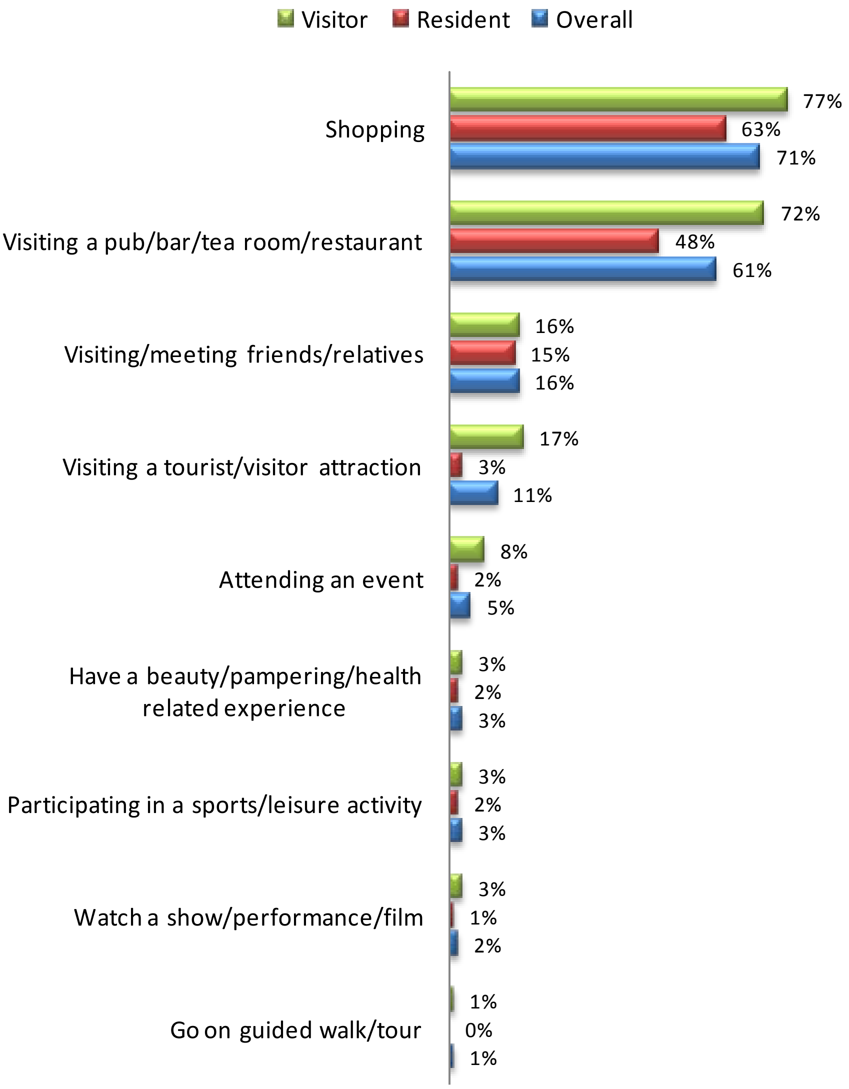
	Resident	Visitor
Base	403	486
Never, first visit	-	22%
At least once before	-	6%
2 to 4 times before	0%	10%
5 to 10 times before	0%	10%
Visit monthly	3%	19%
Visit weekly	18%	29%
Visit almost daily (live or work here)	77%	-
Last visit more than 12 months ago	0%	4%

Activities undertaken/plan to undertake

5.2.11 The most popular past time among visitors whilst visiting the city are shopping (undertaken by 77% of visitors) and visiting an establishment providing food and drink (71%). Both these two activities were also highly popular among residents.

5.2.12 Visiting a tourist attraction in the city was undertaken by 17% of visitors and only 3% of residents during their visit. A small proportion of visitors attended an event during their visit (8%, compared to 2% of residents).

Figure 29: Activities undertaken/planned to undertake



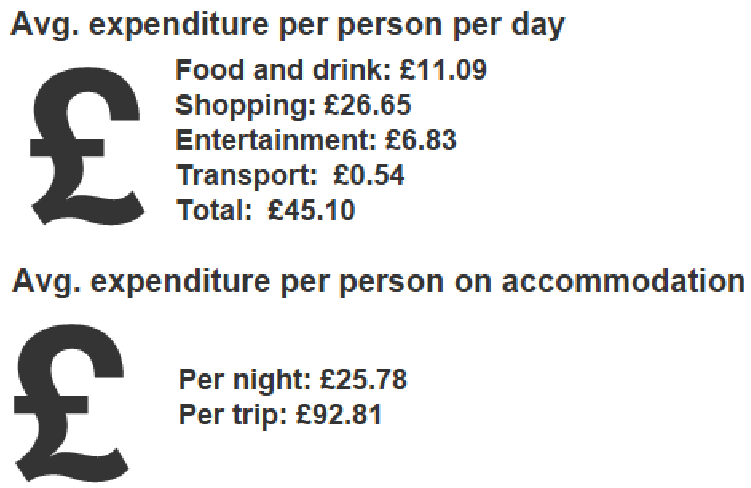
Average trip expenditure

5.2.13 On average, visitors from outside the city (excl. accommodation) spent £45.10 per day during their visit. The largest purchase area was shopping.

5.2.14 Visitors staying overnight in the city incurred an additional cost of £25.78 per night and £92.81 per trip on accommodation. With an average trip length of 3.9 nights, total average expenditure among overnight visitors per trip (incl. food and drink etc.) comes to £255.17.

5.2.15 It should be noted that these average expenditure figures per person per day are somewhat different to the Cambridge Model estimates for the district and are due to the differences in the methodology used to extract the figures.

Figure 30: Average trip expenditure



5.2.16 Comparable expenditure data from recent (2015) visitor surveys are available for two other historic cities. These are Bath and York. The total average expenditure per day per person is higher among Bath visitors but lower among York visitors.

5.2.17 Average expenditure on accommodation per night is much higher for both Bath and York.

Table 27: Average visitor expenditure in other historic cities

	Avg. spend per day (all visitors and excl. Accommodation)	Avg. spend per person per night on accommodation
Bath	£57.81	£44.94
York	£34.69	£44.60

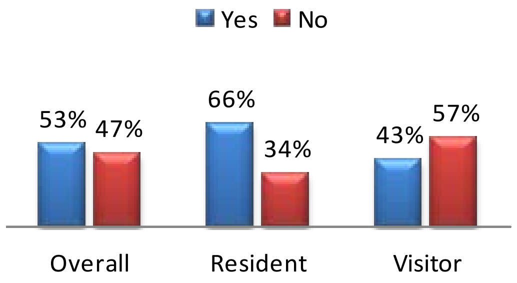
5.3 Evening economy

5.3.1 Two thirds of all residents and 43% of visitors from outside the city visit the city for leisure purposes in the evening.

5.3.2 The main reason for visiting in the evening is to have a meal in one of the city's restaurants followed by visiting one of its pubs or wine bars.

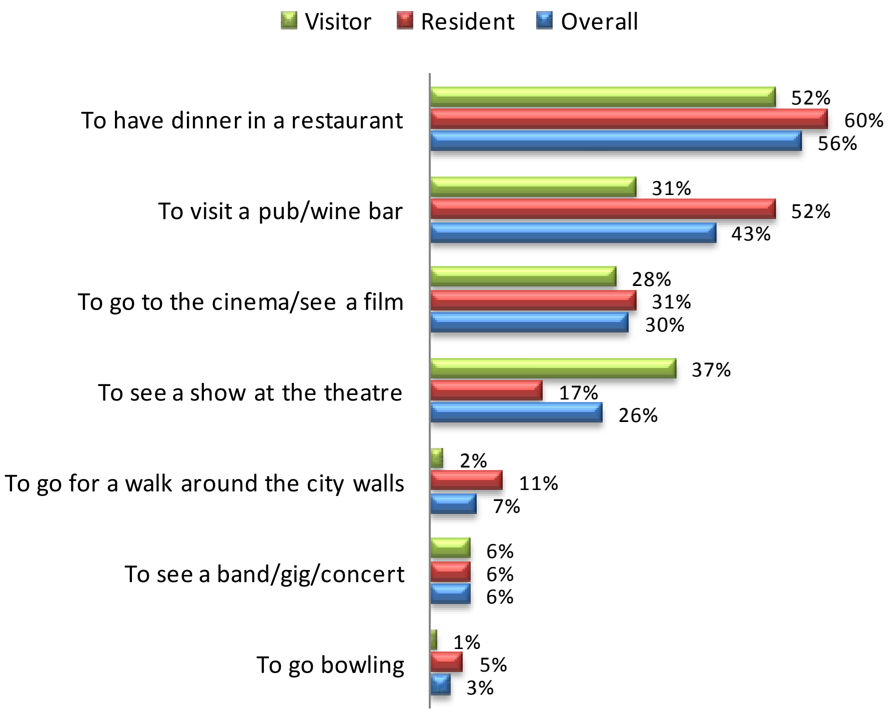
5.3.3 Around a third of all visitors (residents and visitors from outside the city) also come to visit one of its two cinemas.

Figure 31: Whether visit city centre in evening



5.3.4 Visiting Festival Theatre is popular among visitors from outside the city; 37% come to watch a show/performance at the theatre in the evenings.

Figure 32: Reasons for visiting city centre in evening



5.3.5 The main reason residents gave for not visiting the city in the evening for leisure purposes was that they do not generally go out in the evenings. A number of visitors from outside the city also gave this reason and the response needs to be set against the relatively older age profile of visitors.

5.3.6 The main reason for not visiting the city in the evening provided by visitors was that the city was too far to travel for a night out. This is a response that will have come from day visitors. Around 1 in 10 visitors have not visited in the evening simply because they are unaware about what there is to do in the city in the evenings and a similar number are prevented from visiting because of a perceived lack of public transport to the city in the evening.

Table 28: Reasons for not visiting city centre in evening

	Overall	Resident	Visitor
Base	413	137	276
I don't tend to go out in the evening	41%	55%	35%
Too far, prefer to go out in the evening close to where I live	32%	11%	42%
Don't know much about what there is to do in the evening here	9%	4%	11%
There is a lack of public transport to travel to the city centre in the evening	8%	4%	9%
Prefer to go elsewhere for evening leisure/entertainment/socialising	6%	9%	5%
Does not have enough things to do and see in the evening	4%	7%	3%
I am worried about my personal safety (fear of crime)	4%	9%	2%
Does not have the range or quality of places to eat and drink I would like	2%	3%	1%
Place simply does not appeal to me for a visit in the evening	1%	2%	0%
Simply have not had time to visit in the evening	1%	1%	1%
Other	1%	2%	1%
Shops not open late	0%	1%	0%

5.4 Visitor perceptions

5.4.1 When residents and visitors were asked about the factors which were the most important in influencing them to visit the city centre that day, two thirds of residents provided responses not already listed on the questionnaire. The main response from residents to this question was that the trip to the city centre was influenced by the simple fact that they lived close by and visited the centre to conduct routine domestic activities.

5.4.2 Among visitors, the most important factor influencing the visit was the fact that they had visited previously and enjoyed the visit enough to want to visit again (selected by 44% of visitors). The most important factor influencing the decision to visit for just under a fifth of visitors was the presence of specific shops they like to visit and for another 10% of visitors it was the fact that their friends and relatives live in the city. ‘Other’ factors influencing the visit provided by visitors included the fact that the trip was simply part of the itinerary of the coach tour they were on, or that they were in the area on business, or taking part in a sporting event.

Important factors influencing decision to visit

Table 29: Factor most important in influencing decision to visit

	Overall	Resident	Visitor
Base	889	403	486
Other influences to be specified	40%	69%	10%
Visited before and wanted to come back	27%	10%	44%
City has specific type of shops I like to visit	16%	13%	18%
Friends/family live here and visiting them	8%	6%	10%
Visiting an attraction/number of attractions	5%	1%	8%
Visiting to attend a specific event	3%	0%	5%
Recommended by friend/relative/colleague/others	2%	0%	4%
Passing through having visited a nearby attraction, town or event	1%	0%	2%

Best things about the city

5.4.3 As with the question posed to city businesses, residents and visitors were asked about the best and worst things about the city.

5.4.4 A range of factors were mentioned by visitors when they were asked to comment on the best things about the city. The factors mentioned the most often are listed in the table below and a full list can be found in the Appendices.

5.4.5 The best thing about the city centre mentioned most often was its shopping offer (mentioned by 37% of visitors overall (both residents and visitors from outside the city).

Table 30: Top 10 best things about city

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Compactness of city centre – easy to get from one side to another	8%

Note results above are combined responses from both residents and visitors from outside the city

Worst things about the city

5.4.6 A relatively large number of visitors surveyed (residents and visitors from outside the city) did not have any negative comments to make about the city; overall 41% did not provide a response when asked to list the worst things about the city.

5.4.7 Among those who did provide a response, the worst things about the city are parking charges (mentioned by a fifth of all visitors) followed by traffic in the city (mentioned by 16% of all visitors). A full list of responses can be found in the Appendices.

Table 31: Top 10 worst things about the city

Parking availability and charges	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive place to live and visit	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27 – getting here is difficult	5%

Note results above are combined responses from both residents and visitors from outside the city

Aspects most strongly associated with Chichester

5.4.8 When visitors were asked about what they most strongly associated with the city, the response provided by the vast majority of residents and visitors was the Cathedral. Eight out of 10 visitors thought of the Cathedral when they thought of Chichester.

5.4.9 Shopping, Festival Theatre, Goodwood, the heritage of the city, its historical buildings, and its parks and open spaces are other aspects a significant proportion of residents and visitors associated with the city.

Table 32: Aspects most strongly associated with Chichester

	Overall	Resident	Visitor
Base	889	403	486
The Cathedral	83%	84%	82%
Shopping	39%	34%	43%
Theatre	37%	39%	36%
Goodwood	36%	45%	29%
Heritage/History	34%	34%	34%
Parks & Open Spaces/Gardens	27%	34%	21%
Arts & Culture	17%	21%	14%
The street markets	16%	18%	14%
The University	15%	19%	11%
Events	5%	5%	4%
Nightlife	4%	4%	4%
Outdoor sports	2%	3%	1%
Other associations to be specified	1%	1%	1%
Warmth of welcome	0%	0%	0%
Ease of access/strong transport links connectivity	0%	0%	0%

Visitor rating on vibrancy scale

5.4.10 When residents and visitors were asked to rate the ‘vibrancy’ of the city on a scale of 1 to 5 where 1 depicts the city as being ‘Behind the times/old fashioned’ and 5 depicts the city as ‘vibrant and cosmopolitan’, most went for an middle ‘average’ rating. The scores are broadly similar to that provided by city businesses.

5.4.11 Residents provided an average score of 3.0 out of 5 and visitors provided an average rating of 3.3 out of 5.

Figure 33: Visitor rating on vibrancy

5.5 Visitor satisfaction

Parking

5.5.1 Residents and visitors were found to be generally more satisfied with the ease of parking than the cost of parking. The latter received relatively average scores.

Table 33: Satisfaction rating on ease of parking

	Resident	Visitor
Avg. score out of 5	4.5	4.6
Very difficult	3%	1%
Quite difficult	3%	4%
Neither particularly difficult or easy	4%	2%
Quite easy	22%	24%
Very easy	68%	69%

Table 34: Satisfaction rating on cost of parking

	Resident	Visitor
Avg. score out of 5	3.1	3.7
Very expensive	15%	3%
Quite expensive	12%	10%
About average	31%	25%
Reasonable	31%	40%
Very reasonable	12%	22%

Accommodation

5.5.2 Among visitors staying overnight in commercial accommodation in the city, the majority described the range, quality and value for money of accommodation as ‘Very good’.

Table 35: Satisfaction rating on accommodation

	Quality of service	Value for money
Base	27	27
Mean	4.4	4.4
Very poor	-	-
Poor	-	-
Average	15%	15%
Good	26%	26%
Very good	59%	59%

Visitor attractions & other places to visit

5.5.3 Satisfaction with visitor attractions and other places to visit was generally higher among visitors than residents. Visitors gave the range, quality and value for money of places to visit average scores of 4 out of 5. Residents scored the quality of service found at attractions at a similar level as visitors, but range and value for money fell a little below this.

Table 36: Satisfaction rating on attractions and other places to visit - residents

Residents	Range	Quality of service	Value for money
Base	331	331	331
Mean	3.9	4.2	3.8
Very poor	1%	1%	1%
Poor	5%	1%	7%
Average	22%	15%	27%
Good	41%	44%	38%
Very good	30%	38%	27%

Table 37: Satisfaction rating on attractions and other places to visit - visitors

Visitors	Range	Quality of service	Value for money
Base	369	369	369
Mean	4.2	4.4	4.2
Very poor	0%	0%	0%
Poor	2%	1%	2%
Average	15%	10%	17%
Good	44%	39%	41%
Very good	38%	50%	40%

Places to Eat & Drink

5.5.4 The mean average scores were generally high among both residents and visitors for places to eat and drink in the city. Residents and visitors where satisfied the most with the range of places to eat and drink; 73% of residents and 70% of visitors rated the range of places to eat and drink as 'Very Good'.

Table 38: Satisfaction rating on places to eat and drink - residents

Resident	Range	Quality of service	Value for money
Base	369	369	369
Mean	4.6	4.4	4.0
Very poor	1%	1%	2%
Poor	2%	0%	4%
Average	5%	13%	22%
Good	19%	34%	37%
Very good	73%	53%	35%

Table 39: Satisfaction rating on places to eat and drink - visitors

Visitor	Range	Quality of service	Value for money
Base	426	403	406
Mean	4.6	4.5	4.3
Very poor	0%	0%	0%
Poor	1%	0%	2%
Average	6%	7%	15%
Good	24%	34%	37%
Very good	70%	59%	47%

Shops

5.5.5 Higher satisfaction scores on range, quality of shopping environment, and quality of service were provided by visitors than residents. A higher proportion of residents scored these three measures of shopping in the city as 'Average'. Overall, however, satisfaction was either 'Good' or 'Very good' among both residents and visitors.

Table 40: Satisfaction rating on shops - residents

Resident	Range	Quality of shopping environment	Quality of service
Base	396	396	396
Mean	3.9	4.2	4.2
Very poor	2%	1%	1%
Poor	8%	2%	1%
Average	23%	13%	15%
Good	34%	41%	42%
Very good	33%	43%	41%

Table 41: Satisfaction rating on shops - visitors

Visitor	Range	Quality of shopping environment	Quality of service
Base	456	456	456
Mean	4.4	4.5	4.5
Very poor	0%	0%	0%
Poor	2%	1%	1%
Average	11%	5%	4%
Good	34%	36%	39%
Very good	53%	57%	56%

Ease of finding way around

5.5.6 Resident's and visitor's satisfaction ratings on road and pedestrian signage were broadly similar – with most providing scores of 4 and over.

Table 42: Satisfaction rating on ease of finding one's way around - residence

Resident	Road signs	Pedestrian signs	Display maps and information boards
Base	320	320	320
Mean	4.3	4.3	4.3
Very poor	0%	2%	2%
Poor	6%	3%	5%
Average	13%	14%	12%
Good	23%	26%	25%
Very good	59%	56%	57%

Table 43: Satisfaction rating on ease of finding one's way around - visitors

Visitor	Road signs	Pedestrian signs	Display maps and information boards
Base	389	389	389
Mean	4.5	4.5	4.4
Very poor	1%	1%	1%
Poor	2%	1%	2%
Average	7%	9%	9%
Good	28%	28%	30%
Very good	62%	61%	58%

Public toilets

5.5.7 Among residents 62% rated the cleanliness of the public toilets as 'Good' or 'Very good' compared with 53% who said the same for the availability.

5.5.8 Three quarters of visitors rated the cleanliness of the public toilets as 'Good' or 'Very good' and 65% rated the availability of public toilets in the city as 'Good' or 'Very good'.

Table 44: Satisfaction rating on public toilets - residents

Resident	Availability	Cleanliness
Base	316	316
Mean	3.6	3.8
Very poor	7%	5%
Poor	13%	10%
Average	27%	23%
Good	24%	30%
Very good	29%	32%

Table 45: Satisfaction rating on public toilets - visitors

Visitor	Availability	Cleanliness
Base	302	302
Mean	3.8	4.1
Very poor	5%	2%
Poor	11%	5%
Average	18%	16%
Good	29%	34%
Very good	36%	43%

Cleanliness of streets

5.5.9 Satisfaction with cleanliness of the streets and upkeep of parks and open spaces was found to be high among both residents and visitors; 88% of residents and 84% of visitors rated the cleanliness of the streets as 'Good' or 'Very good' and 96% of residents and 98% of visitors rated the upkeep of parks and open spaces as 'Good' or 'Very good'.

Table 46: Satisfaction rating on cleanliness of streets - residents

Resident	Cleanliness of streets	Upkeep of parks and open spaces
Base	397	397
Mean	4.4	4.7
Very poor	1%	0%
Poor	1%	0%
Average	9%	3%
Good	37%	24%
Very good	51%	72%

Table 47: Satisfaction rating on cleanliness of streets - visitors

Visitor	Cleanliness of streets	Upkeep of parks and open spaces
Base	476	476
Mean	4.5	4.7
Very poor	1%	0%
Poor	1%	1%
Average	5%	1%
Good	38%	29%
Very good	55%	69%

Nightlife/evening entertainment

5.5.10 Whilst a significant number of residents and visitors had no experience of evening entertainment/nightlife in the city, among those who did, satisfaction was generally lower than many of the other aspects of performance rated.

5.5.11 A significant proportion of residents and visitors provided poor or average scores. Residents in general provided lower scores than visitors. For example, 35% of residents rated the range of evening entertainment as 'Poor; or 'Very poor', compared to 14% of visitors. That said, a significant proportion of both residents and visitors thought the range, quality of service and value for money for nightlife in the city were either ‘Good’ or ‘Very good’.

Table 48: Satisfaction rating on evening entertainment - residents

Resident	Range	Quality of service	Value for money
Base	237	237	237
Mean	3.1	3.7	3.5
Very poor	12%	4%	5%
Poor	23%	7%	13%
Average	25%	27%	28%
Good	25%	40%	38%
Very good	15%	21%	17%

Table 49: Satisfaction rating on evening entertainment - visitors

Visitor	Range	Quality of service	Value for money
Base	164	164	164
Mean	3.7	4.1	3.9
Very poor	4%	2%	1%
Poor	10%	3%	7%
Average	23%	11%	23%
Good	38%	49%	39%
Very good	26%	35%	30%

Overall impression of the City

5.5.12 Satisfaction with the general atmosphere of the city was high among both residents and visitors; 92% of residents and 96% of visitors rated this aspect as either ‘Good’ or ‘Very good’.

5.5.13 Satisfaction on feeling of welcome was also high; 88% of residents and 93% of visitors rated this aspect as either ‘Good’ or ‘Very good’.

Table 50: Satisfaction rating on overall impression and welcome- residents

Resident	General atmosphere	Feeling of welcome
Base	403	403
Mean	4.5	4.4
Very poor	0%	1%
Poor	1%	2%
Average	7%	9%
Good	35%	36%
Very good	57%	52%

Table 51: Satisfaction rating on overall impression and welcome- - visitors

Visitor	General atmosphere	Feeling of welcome
Base	486	486
Mean	4.6	4.6
Very poor	0%	0%
Poor	1%	1%
Average	4%	5%
Good	30%	28%

Very good	66%	65%

Overall trip enjoyment

Just over a quarter of residents and a fifth of visitors rated their overall trip enjoyment as ‘Average’. For others, the trip was enjoyable; 72% of residents and 80% of visitors rated overall enjoyment as either ‘High’ or ‘Very high’.

Table 52: Overall trip enjoyment

	Resident	Visitor
Base	403	486
Mean	4.0	4.1
Very low	0%	0%
Low	1%	0%
Average	28%	19%
High	45%	50%
Very high	27%	30%

72% of residents report that overall enjoyment was high or very high

80% of visitors report that overall enjoyment was high or very high

6 Key findings and recommendations

6.1 Introduction

6.1.1 The findings of this research portray a positive picture of tourism in the Chichester District but have identified some specific areas for improvement in order to increase the volume and value of tourism. These are highlighted in blue in this section.

6.2 Value of tourism in the local economy

6.2.1 There are 455 businesses in the Chichester District directly involved in tourism. These are either accommodation providers (401 in total) or attractions/ places to visit/ activity providers (54 in total). Tourism-based businesses therefore represent 7.2% of all businesses in the Chichester District. Together these businesses generated an estimated revenue of £414.4 million in 2015 and supported an estimated 5810 FTE jobs. Taking into account the part-time and/or seasonal nature of many jobs within this industry sector, this rises to 8037 total jobs.

6.2.2 Tourism businesses and accommodation are spread across the District due to the presence of some major attractions away from the city of Chichester, notably Goodwood, Marwell Zoo, National Trust properties, Fishbourne Roman Villa and Arundel Castle plus the attraction of the coastline – together these help to distribute the industry and employment across the District.

6.2.3 Inevitably, there is a concentration in the city of Chichester: 77 accommodation businesses and 17 visitor attractions are located in the City/PO19 area. The four main city centre based attractions are Chichester Cathedral, Festival Theatre, Pallant House, and The Novium. These four attractions account for 212.4 FTE jobs and generate £15.7 million annually for businesses across the City, District and the wider region. Whilst these are significant sums brought into the area by these four attractions, these represent only 3.7% and 3.8% respectively of the total jobs and revenue.

6.3 Bedspace available

6.3.1 Bedspace capacity is potentially one of the key constraining factors on the District's ability to increase revenue from tourism. The 401 accommodation businesses provide almost 19000 bedspaces but 75% of this is in caravan/camping and chalet sites making this primarily a seasonal provision. In addition, this is concentrated in the PO20 area.

6.3.2 A further 1262 self-catering bedspaces (7% of the total) are available through holiday lets and self-catering apartments.

6.3.3 Serviced accommodation accounts for 16% of the total accommodation available which equates to 3060 bedspaces. 53% of serviced bedspace is located within the city/PO19 area.

Recommended action: A seasonal occupancy survey is recommended to identify if this constrains the tourism market at certain times of the year. A web visitor survey is recommended to determine whether overnight visitors found the type of accommodation they required.

6.4 Volume and value of tourism in Chichester District

6.4.1 An estimated 6.3 million visits were made to this area in 2015 comprising:

- 5.7 million day visits with visitor expenditure estimated at £189.2 million
- 477.7 thousand domestic overnight visits with visitor expenditure estimated at £76.1 million
- 123.4 thousand overseas overnight visits with visitor expenditure estimated at £56.2 million.

6.4.2 This puts Chichester on a par with Canterbury in terms of visit profile and volume.

6.4.3 Looking at average spend per trip, this shows that Chichester outperforms Canterbury by approximately 8%. In addition, compared to the South East region, Chichester surpasses the Regional average spend in all trip types, as detailed overleaf (Table 53).

Comparison of Average Visitor Spend in Chichester vs. South East Region

	Chichester District Visitors	All South East Region Visitors	Comparison Chichester District vs. South East
Domestic overnight visitors	£170.05	£150.82	+12.7%
Overseas overnight visitors	£455.20	£436.10	+4.4%
Day visitors	£33.45	£31.00	+7.9%
Total visitors	£51.62	£48.32	+6.8%

6.5 Profile of visitors to the city of Chichester

6.5.1 Visitors to Chichester are primarily from Sussex and Hampshire – together these accounted for three quarters of all visitors in the recent survey. Only 5% came from Surrey. Noteworthy is the very low proportion originating in London – 3%: this represents a real opportunity to increase visits from this densely populated area.

6.5.2 Visitors from overseas residents were scarce – estimated at 5% in 2015 and much smaller than other UK cities such as Bath (28%) York (15%).

Recommended action: A campaign to increase the number of overseas visitors is recommended especially as these are higher value visitors due to their above average spend per visit (see table 53 above).

Visitors from overseas may need more assistance than domestic visitors when planning a visit. To attract their attention, collaboration with a well-known attraction is recommended to promote the area. Goodwood events and Portsmouth Historic Docks/Marie Rose Museum are well known attractions with the potential to attract attention on the international stage. Suggested itineraries are recommended for inclusion on the Visit Chichester website to demonstrate ease of visiting, proximity to London and ease of travelling around. For example, single day and two day itineraries to include Chichester Cathedral and city centre together with one or two leading attractions are recommended. This would be in addition to the current itinerary planning function on the website.

6.5.3 Visitors tended to be older with almost 60% aged 55+ but only a third were retired; 65% were ABC1. A third visited alone with another third visiting with their spouse and 20% with their family. The average group size was 1.9. Primary reasons for visiting were for a leisure day out (33%) and for a special shopping trip (27%). 17% visited a tourist attraction in the city and 8% came for an event. 5% visited for a holiday or short break. The average day trip length was 3.4 hours and overnight trip was 3.9 nights.

6.5.4 Residents visiting the city are younger than visitors with less than a quarter retired. 44% are aged 25 – 54 and only 38% are 55+. Residents are slightly more up market: 70% are ABC1. Two thirds visit the city alone. The main reasons to visit the city centre are to do their regular domestic shopping or because they live, work or study in the city centre area.

6.5.5 Amongst visitors, frequency of visiting was high with 29% visiting weekly and another 29% visiting 5 + times a year. In addition, it is very positive to note the incidence of first time visitors at 20%. It is important to attract a balance of regulars and to supplement these with a pool of new visitors.

6.5.6 As may be expected, local residents are frequent visitors to the city centre: three quarters visit every day.

Recommended action: Data capture is to be encouraged by local businesses to maximise opportunities to communicate with visitors at a later date and to sell on line. Businesses could provide off peak/out of season offers to encourage new visitors to return.

6.6 Tourism business performance

6.6.1 Feedback from tourism businesses on trading levels from January to end of July 2016 compared to the same period last year, showed a fairly even divide between those experiencing an improvement, those reporting a decline and those who experienced no significant change. However, there were different responses from various sectors: within retail and serviced accommodation, more businesses reported a decline in trading whilst the most positive outcomes were reported by restaurants.

6.6.2 Looking ahead to the coming year, more businesses were positive than negative (33% vs. 20%) and again it was the restaurants who were the most positive. Positivity was driven as much by expectations of improvements to the weather as any other individual influence. But weather aside, positivity was said to be due to investment in the business plus attractions and events increasing visitor numbers.

6.6.3 When asked about factors affecting business performance, the cost of parking in the city was frequently cited and was also raised when asked about changes which would improve the performance of their business and the local economy. In addition, problems with traffic management and congestion (generally on the A27 and specifically due to roadworks) were raised as issues.

6.6.4 Other issues mentioned were the need to promote the destination more and to develop the night time economy.

6.7 Image amongst businesses (business survey)

6.7.1 There is a positive view of the city amongst businesses with many citing the heritage and historical architecture of the city as the best thing about the city. It is felt to be an attractive centre with a good ambience, a good range of shops and easy to get around.

6.7.2 On the negative side the image of the city is affected by heavy traffic congestion which many businesses felt deterred visitors from coming to the city. Once again the perceived high cost of parking and a view that the city lacked adequate parking provision was raised.

6.7.3 When asked about the vibrancy of the city, Chichester was not rated highly rated, achieving an average of 3.3 out of 5. This highlights an area for development, especially if Chichester is to compete for day trip and short break business originating from London and abroad.

Recommendation: ensure all businesses are represented by a photo on the Visit Chichester site to communicate visually the breadth of businesses available.

6.8 Image amongst visitors

6.8.1 Research was conducted amongst visitors and amongst residents of the area visiting the city.

6.8.2 Amongst visitors, the Cathedral is well known. Other associations are with the shopping, the Festival Theatre, and Goodwood. The heritage of the city and its historical buildings, plus its parks and open spaces are also associated with the city. These are frequently cited as the best things about the city along with the ambience of the city. The general atmosphere and feeling of welcome in the city were rated highly (both at 4.6 out of 5) by visitors.

6.8.3 The overall opinion of the city of Chichester was good with almost zero criticism. The average rating for overall enjoyment was 4.1 out of 5 amongst visitors and 4.0 amongst residents. Whilst a positive outcome, there is definite scope to improve the overall enjoyment levels. To offer some context as to what might be achievable, in 2014 the city of Bath received a rating of 4.63 out of 5 from visitors.

6.8.4 When asked about the worst things in the city, it is reassuring to note that over 40% did not respond. In line with the business survey, factors which were raised were car parking costs, traffic and also a decline in independent shops. The score attributed for the vibrancy of the city, in line with the view of businesses, was much lower than the overall enjoyment at 3.3 amongst visitors and 3.0 amongst residents reinforcing the need to address this.

Recommended action: Review the factors contributing to the atmosphere and vibrancy of the city in competing cities – Canterbury, Exeter and Bath are suggested - to identify elements which could be introduced in Chichester. Review the portrayal of the city on the Visit Chichester website, taking into account the short dwell times per page:

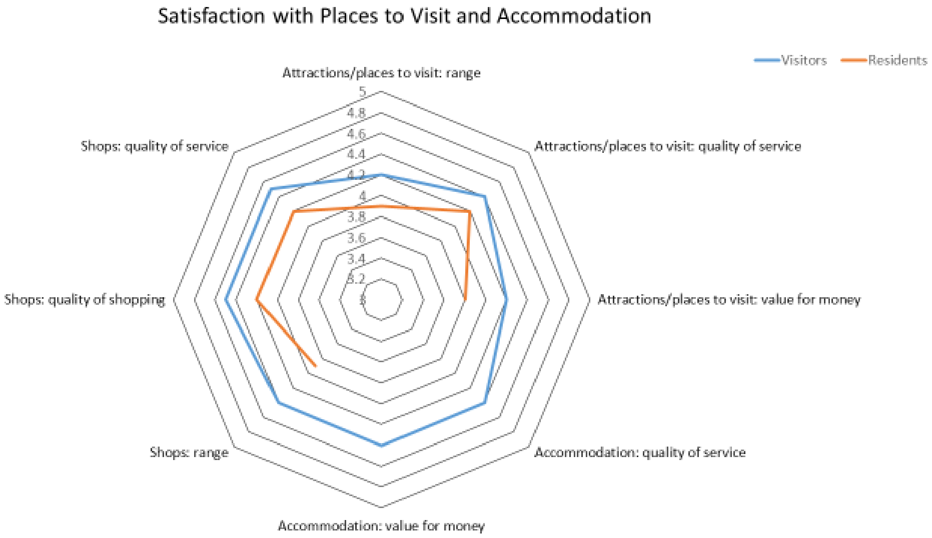
- *Shopping: the shopping pages feature little photography and do not communicate the range of shopping available. Ensure every shop displays a photo and use the web banner on this page to display a rolling series of atmospheric street and shopping photography.*
- *Identify strengths in the independent shopping offer - for example antiques or food specialists - and communicate these visually on the Visit Chichester website. Develop a themed shopping trail to communicate the range of independent shops. This might take in specialist farm shops outside of the city.*
- *Publicise a guided walk of the city to link key attractions plus recommendations for refreshments and dining.*
- *Make full use of photography on the navigational panels (City/Country/Coast coloured panel). Many pages feature this panel plus a map but little photography until the viewer scrolls down the page. Consequently, potential visitors may not see the motivational shots when browsing superficially.*

6.9 Visitor Satisfaction

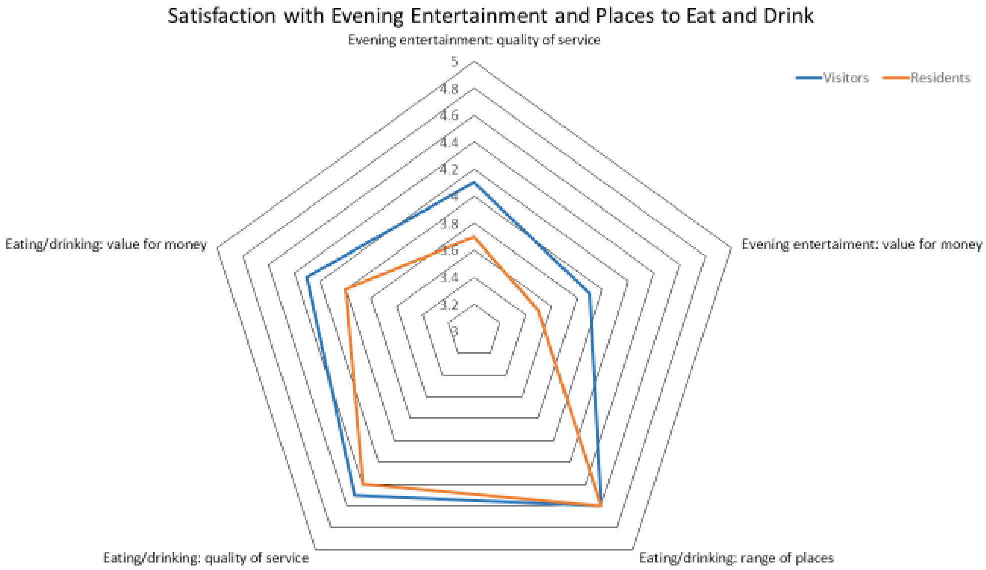
6.9.1 Analysis of satisfaction with the individual elements of the city is shown on the following spider diagrams. This identifies two main areas which have impacted on the overall satisfaction scores are the cost of parking and availability of public toilet facilities. Criticism of the cost of parking was raised as an issue in the business research. (It is worth noting that other dimensions exploring value for money have not attracted the same level of criticism as parking in the city.) Given the prevalence of the car as a mode of travel to Chichester, perceived cost of parking is an important issue.

Recommended action: There is multiple evidence that cost of car parking is an issue – real or not, it is a perception which would be advisable to address. Examine ways to allow businesses to be involved in this; for example – accommodation providers could offer a car parking voucher to give discount on parking or to offer the first two hours free; retailers could refund parking when customers spend over an agreed amount; parking charges could stop one hour earlier in the day to encourage early evening dining at the end of a day shopping. This would extend trip length and increase spend.

6.10 Places to visit – shops and attractions - and accommodation available all surpass the overall satisfaction scores amongst visitors and perform well in terms of quality and value.



6.11 Satisfaction ratings confirm visitors are happy with the range, quality and value of places to eat and drink but reveal less satisfaction with the service and value of evening entertainment choices.



6.12 The Evening economy

6.12.1 There is a thriving evening economy with two thirds of residents and 43% of visitors from outside the city visiting for leisure purposes in the evening, primarily to dine in a restaurant, pub or wine bar.

6.12.2 The theatre and cinema also attract residents and visitors into the city with the theatre being particularly successful at attracting visitors.

6.12.3 However, the satisfaction ratings given above suggest there is scope to improve the quality of service and value of evening entertainment.

Recommendation: include an evening events section on the Visit Chichester website and use to encourage visitors to stay into the evening. A date ordered events calendar would make browsing for activities simpler. Out of date activities need to be removed from the calendar. Calendarise the current What's On section making this easier to navigate by date.

Appendices

Table 53: UK counties of residence among domestic visitors

	486
Sussex	50%
Hampshire	26%
Surrey	5%
London	3%
Kent	1%
Berkshire	1%
Buckinghamshire	1%
Lancashire	1%
Staffordshire	1%
Devon	1%
Hertfordshire	1%
Dorset	1%
Essex	1%
Leicestershire	1%
Wiltshire	1%
Cheshire	0.4%
East Yorkshire	0.4%
Glamorgan	0.4%
Isle of Wight	0.4%
Lincolnshire	0.4%
Middlesex	0.4%
Bedfordshire	0.2%
Ceredigion	0.2%
County Armagh	0.2%
Cumberland	0.2%
Derbyshire	0.2%
Gloucestershire	0.2%
Kinross-Shire	0.2%
Norfolk	0.2%
Northamptonshire	0.2%
Northumberland	0.2%
Oxfordshire	0.2%
Ross-shire	0.2%
Somerset	0.2%
Suffolk	0.2%
Swansea	0.2%
West Yorkshire	0.2%
Grand Total	100.0%

Table 54: UK town/city of residence among domestic visitors

Chichester District – outside City (mainly PO18 and PO20)	19%
Bognor Regis	14%
Waterlooville	4%
Havant	3%
Emsworth	3%
Littlehampton	3%
London	3%
Portsmouth	3%
Worthing	3%
Midhurst	2%
Petersfield	2%
Southampton	2%
Fareham	2%
Southsea	2%
Pulborough	2%
Arundel	1%
Crawley	1%
Hayling Island	1%
Petworth	1%
Eastleigh	1%
Guildford	1%
Brighton	1%
Haslemere	1%
Hove	1%
Maidenhead	1%
Walsall	1%
Woking	1%
Aldershot	0.4%
Alton	0.4%
Burgess Hill	0.4%
Farnham	0.4%
Godalming	0.4%
Gosport	0.4%
High Wycombe	0.4%
Horsham	0.4%
Lee-on-the-solent	0.4%
Leicester	0.4%
Liss	0.4%
Shoreham-by-Sea	0.4%
Ashford	0.2%
Aylesbury	0.2%
Barnet	0.2%
Bath	0.2%
Beckenham	0.2%
Billingshurst	0.2%
Bracknell	0.2%

Bristol	0.2%
Broadstairs	0.2%
Bury	0.2%
Camberley	0.2%
Canterbury	0.2%
Cardiff	0.2%
Cardigan	0.2%
Chelmsford	0.2%
Chesham	0.2%
Coalville	0.2%
Craigavon	0.2%
Croydon	0.2%
Dingwall	0.2%
Enfield	0.2%
Epping	0.2%
Epsom	0.2%
Exmouth	0.2%
Farnborough	0.2%
Felixstowe	0.2%
Ferndown	0.2%
Gillingham	0.2%
Glossop	0.2%
Gravesend	0.2%
Haywards Heath	0.2%
Hexham	0.2%
Hindhead	0.2%
Holmfirth	0.2%
Honiton	0.2%
Hull	0.2%
Iver	0.2%
Kinross	0.2%
Lancing	0.2%
Liverpool	0.2%
Macclesfield	0.2%
Maesteg	0.2%
Manchester	0.2%
Melksham	0.2%
Millom	0.2%
Mitcham	0.2%
New Milton	0.2%
Newhaven	0.2%
North Ferriby	0.2%
Northampton	0.2%
Oldham	0.2%
Oxford	0.2%
Paignton	0.2%
Peacehaven	0.2%

Plymouth	0.2%
Polegate	0.2%
Radlett	0.2%
Reading	0.2%
Richmond	0.2%
Romsey	0.2%
Royal Tunbridge Wells	0.2%
Ryde	0.2%
Saint Albans	0.2%
Sale	0.2%
Salisbury	0.2%
Seaview	0.2%
Shefford	0.2%
Sleaford	0.2%
Spalding	0.2%
Steyning	0.2%
Stoke-on-trent	0.2%
Swansea	0.2%
Swindon	0.2%
Tadley	0.2%
Thetford	0.2%
Thornton Heath	0.2%
Watford	0.2%
West Malling	0.2%
West Molesey	0.2%
Wickford	0.2%
Wigan	0.2%
Wolverhampton	0.2%

Table 55: Overseas visitor country of residence

Base	20
Australia	40%
U.S.A.	20%
Germany	15%
Canada	5%
Rep. of Ireland	5%
Italy	5%
Netherlands	5%
New Zealand	5%

Table 56: Best things about the city

Shopping	37%
General ambience	24%
Architecture/buildings	19%
Cathedral	16%
History/culture	13%
Friendly	11%
Variety of places to eat and drink	11%
Compactness/easy to get to one end to another	11%
Pedestrianisation of city centre shopping area	10%
Lots to do and see	8%
Quietness	7%
Parks and gardens	7%
Cleanliness of the city	6%
Quaintness of the city	6%
Safety/feel safe from crime in the city	4%
Theatre	4%
Nice place to live	3%
Easy to get to the city	3%
Markets	2%
Plenty of parking	2%
Places to walk	2%
University	1%
Street entertainment	1%
Cinema	1%
Good public transport	1%
Close to sea	1%
Unspoilt/scenery/nature	1%
Lake/river/canal	1%
Novium	<1%
Good cycle lanes	<1%
Sports centre/Gym	<1%
Good rail link	<1%
Flowers	<1%
No beggars	<1%
Plenty of toilets	<1%
Peregrines	<1%
Beach	<1%
Butlins	<1%
Mini golf/putting	<1%
Fresh air	<1%
Child/family friendly	<1%
Seating	<1%

Table 57: Worst things about the city

Parking availability and costs	20%
Traffic	16%
Decline in number of independent shops	11%
Not much nightlife	8%
Uneven pavements	7%
Expensive	7%
Building/road works	6%
Too many restaurants/cafes/coffee shops	5%
Too crowded	5%
A27	5%
Not much to do	4%
Not enough for children/young people	3%
Lack of good pubs and restaurants	3%
Not enough public toilets	3%
Shops, cafes and pubs shut too early	3%
Not enough big name shops	3%
Lack of evening public transport	3%
Snobby/rude people	3%
Beggars/vagrants	2%
Youths hanging around	2%
Lack of signage	2%
Too many chain shops	2%
Litter	2%
Street markets	1%
Close streets to buses	1%
Train gates	1%
Too mnay modern buildings	1%
Old fashioned/dated/shabby	1%
No shade/shelter/seating	1%
Cyclists not using cycle paths/speeding	1%
Not enough bike racks	<1%
Unisex toilets	<1%
Lack of police presence	<1%
Flower boxes/parks need tidying	<1%
Sunday opening	<1%
No places for coaches to stop	<1%
Lack of cycle paths	<1%
Elderly population	<1%
Too touristy	<1%
No sports complex	<1%
Too many charity shops	<1%
Weather	<1%
Marina	<1%
Birds/mess	<1%
Noisy at night	<1%
Not wheelchair friendly	<1%

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