

Bexhill Destination Benchmarking Visitor Survey 2005

Final Report

TOURISM
SOUTH EAST

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EXECUTIVE SUMMARY

Profile of visitors

- ⇒ With regard to visitor type, the largest proportion of visitors, around 48% were day visitors from home. 27% were visitors staying outside Bexhill and the remaining 26% were staying within Bexhill.
- ⇒ Visiting parties contained on average 2.55 people and 74% of all visiting parties contained adults only.
- ⇒ 2% of visitors to Bexhill were part of an organised group.
- ⇒ 4.6% were from overseas, the most were from Germany, followed by France and USA among the most popular countries of origin. The remaining 95.4% of visitors were from a wide range of locations in the South East with Kent, East Sussex and Greater London among the most popular counties of origin.
- ⇒ Most visitors staying in Bexhill were found to be staying at the homes of friends or relatives.

Visit characteristics

- ⇒ Leisure and holiday purposes are the main purpose of visits for the majority of visitors to Bexhill.
- ⇒ The average length of stay for day visitors (both from home and from holiday bases) was found to be 3.01 hours.
- ⇒ The average length of a staying trip was found to be 6.51 nights.
- ⇒ 74% of visitors had visited Bexhill previously.
- ⇒ 85% of visitors travelled to Bexhill by private motor vehicle.
- ⇒ The De La Warr Pavilion (47.7%) was the most popular place visited, followed by Hastings Castle (43.6%) and Bexhill Museum (29.5%).

Destination awareness

- ⇒ The most popular website viewed was www.1066country.com
- ⇒ Beaches and seafront were the biggest factor in the decision to visit Bexhill (75%).
- ⇒ The main image of 1066 Country was the Battle of Hastings (51.3%).
- ⇒ The peace and lack of crowds was the main thing liked about Bexhill (49%).
- ⇒ The fact that the De La Warr Pavilion was closed (23.4%) was the main dislike about Bexhill (it is now open), followed by the public toilets (16.8%).
- ⇒ Only four visitors would not recommend Bexhill as a place to visit.

Visitor expenditure

- ⇒ On average, a staying visitor was found to have spent £27.72 per person per 24 hours. This compares to an average staying visitor spend of £51.15 across all resorts and £62.94 across destinations in general.
- ⇒ On average, a day visitor (both from home and from holiday bases) was found to have spent £9 per person per 24 hours. This compares to an average staying visitor spend of £19.81 across all resorts and £23.17 across destinations in general.

Visitor opinions

- ⇒ Visitors to Bexhill had relatively low levels of satisfaction on the various indicators which together comprise the 'visitor experience' in comparison to all resorts and all destinations.
- ⇒ The highest scoring indicators related to the upkeep of parks and open spaces and the cleanliness of the beach and sea.
- ⇒ The lowest scoring indicators related to nightlife and the availability and cleanliness of public toilets. However no indicators rated less than 3.00 ('average').
- ⇒ 88% of visitors rated the overall enjoyment of their visit as 'high' or 'very high'. 83% rated the likelihood of them recommending Bexhill to others as 'likely' or 'very likely'.

1. INTRODUCTION

1.1 BACKGROUND

This report presents the findings of a face-to-face survey of visitors to Bexhill conducted between July and October 2005.

Month	Sample
July	20
August	220
September	66
October	47

Location	Percentage of Sample
Seafont	79%
Outside De La Warr	20%
Old Town	1%

1.2 DESTINATION BENCHMARKING

During 2005, the Regional Tourist Boards conducted surveys in 17 destinations throughout England to obtain visitors' opinions of a wide range of factors or indicators which together comprise the 'visitor experience'.

Each factor or indicator was rated on a range of one to five, where 1='very poor' (or the most negative response), 2='poor', 3='average', 4='good' and 5='very good' (or the most positive response), allowing an opinion score (out of a maximum of five) to be calculated.

A standardised methodology was used, in terms of the interviewing period, minimum sample size and questionnaire design. This allows direct comparisons to be made between the results for individual destinations and the average and highest ('max') scores from all surveys conducted as well as the average and highest scores obtained in certain types of destination (e.g. seaside resorts). Due to slight differences in questionnaire content, base size (i.e. number of destinations responding) may alter between questions.

Destinations taking part in 2005 are shown in the tables below, along with additional destinations from the 2001 survey and the 2000 survey.

***Please note that this year the average scores are based on all destinations that have taken part in 2000, 2001 and 2005. By introducing this three year 'rolling average', the sample in destination types where participation in the scheme is low will increase, giving a more accurate 'benchmark' with which to compare.**

Seaside Resorts

<u>2005</u>	<u>2004</u>	<u>2003</u>
Southport	Southport	Great Yarmouth
Blackpool	Newquay	Blackpool
Falmouth	Cornish Riviera	Southport
Torbay	Bognor Regis	St Ives
Weston Super Mare	Margate	Torbay

Hastings	Southend	Broadstairs
Bexhill	Great Yarmouth	
Great Yarmouth		
Bridlington		

Historic Towns/Cities

<u>2005</u>	<u>2004</u>	<u>2003</u>
Colchester	Chester	Colchester
Oxford	Worcester	Lichfield
Stratford upon Avon	Durham	Lincoln
	Bath	Guildford
	Windsor	Rochester
	Arundel	Winchester
	Salisbury	Oxford
	Colchester	

Large Towns/Cities

<u>2005</u>	<u>2004</u>	<u>2003</u>
Birmingham	Manchester	Birmingham
Coventry	Liverpool	Rochdale
Walsall	Derby	Salford
Bristol	Newcastle	Bristol
Beverley	Gateshead	Southampton
	Plymouth	
	Portsmouth	
	Peterborough	

Tables show the score for the individual town/city/resort compared with the average score for all destinations and the average score for the relevant destination category.

Sample sizes

Mean opinion scores and percentages have been calculated using amalgamated data from surveys conducted in the destinations listed above. Each destination has been given an equal weighting.

Sample sizes varied significantly between indicators, (because visitors were more likely to use or experience, and therefore comment on, certain facilities, services or features than others) and also varied between destinations.

In almost all cases, sample sizes exceeded 50 respondents. However, in some destinations, samples relating to the following eight indicators were less than 50.

Accommodation – quality of service
Accommodation – value for money
Ease of parking
Cost of parking
Choice of nightlife

Results relating to these indicators should be interpreted with caution.

As a general guide when using a five point scale (ie: samples of 100 – 1000), there must be a difference of at least 0.2 between two mean scores for this to be significant.

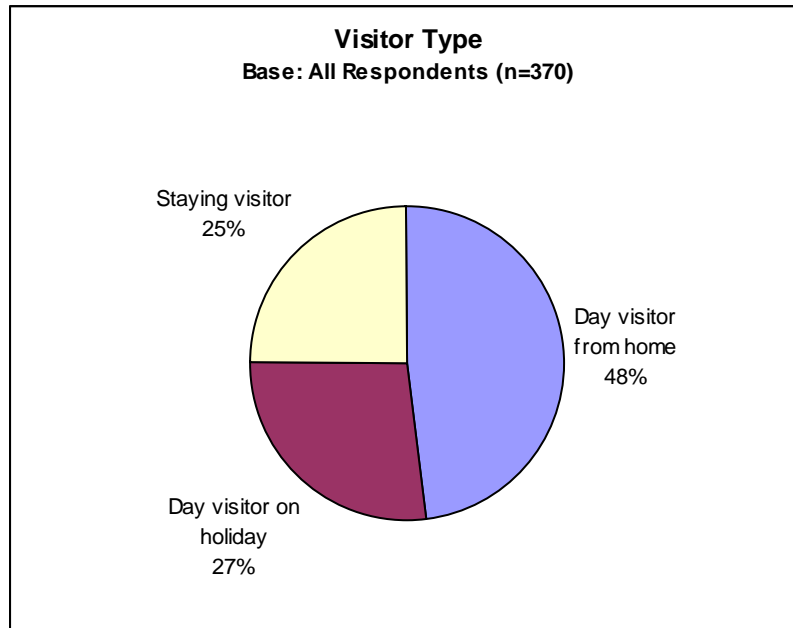
The benchmarking scheme is co-ordinated and delivered by the Regional Tourist Boards. This ensures that a standardised methodology is adhered to, and thus survey data is comparable. The standard factors used to ensure quality and consistency include:

- Face to face interviewing surveys using trained interviewers over a core period of June/July to September, carried out among non-residents.
- Sampling using 400 or more interviews and times which reflect visitor usage.
- Standard core questionnaires.
- Reporting the benchmarking data to a standard format, providing destinations with their own scores, together with best (“max”) and average scores for their comparable type of destination – in this case resorts.

2. VISITOR PROFILE

2.1 VISITOR TYPE - DAY OR STAYING

Of the 370 visitors interviewed, 277 (75%) were day visitors. The majority of these (178, 48%) were day visitors from home, while 99 (27%) were day visitors from holiday bases outside Bexhill. The remaining 93 (26%) of visitors were staying overnight in commercial or non-commercial accommodation within Bexhill.



As can be seen in Table 1, Bexhill has significantly more day visitors than all resorts and all destinations.

TABLE (1): VISITOR TYPE (ALL VISITORS)

	<i>BEXHILL %</i>	<i>ALL RESORTS (AVERAGE %)</i>	<i>ALL DESTINATIONS (AVERAGE %)</i>
DAY VISITORS	75	57	68
STAYING VISITORS	25	43	32

2.2 GROUP SIZE AND COMPOSITION

On average, in Bexhill visitor groups contained 2.55 persons. This does not vary significantly from all resorts and all destinations averages.

TABLE (2): AVERAGE GROUP SIZE (ALL VISITORS)

	BEXHILL %	ALL RESORTS (AVERAGE %)	ALL DESTINATIONS (AVERAGE %)
CHILDREN	0.36	0.54	0.40
ADULTS	2.20	2.22	2.07
TOTAL PEOPLE	2.55	2.75	2.46

Three-quarters (74%) of all visiting groups to Bexhill contained adults only
Among groups containing children, the most popular group composition was two adults with two or more children (5% of total sample).

TABLE (3): Group Composition

	All	Day visitor from home	Day visitor on holiday	Staying visitor
One adult	11%	10%	2%	23%
Two adults	54%	52%	65%	43%
Three adults	9%	10%	6%	10%
Four adults	5%	4%	6%	3%
Five or more adults	2%	2%	1%	3%
One adult & one child	2%	4%	-	1%
One adult & two or more children	2%	2%	1%	2%
Two adults & one child	3%	2%	3%	4%
Two adults & two or more children	9%	9%	11%	5%
Three adults & one child	1%	2%	1%	1%
Three adults & two or more children	1%	1%	1%	-
Four or more adults & one or more children	2%	2%	2%	3%

2.3 PART OF AN ORGANISED GROUP?

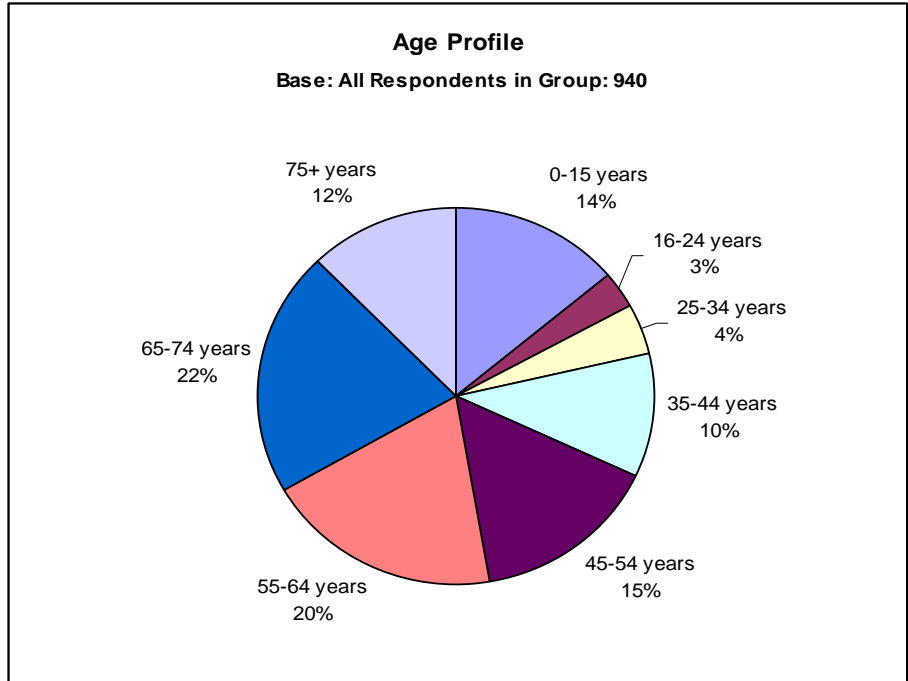
Fewer visitors to Bexhill were part of an organised group than for all resorts and destinations.

TABLE (4): WHETHER PART OF ORGANISED GROUP (ALL VISITORS)

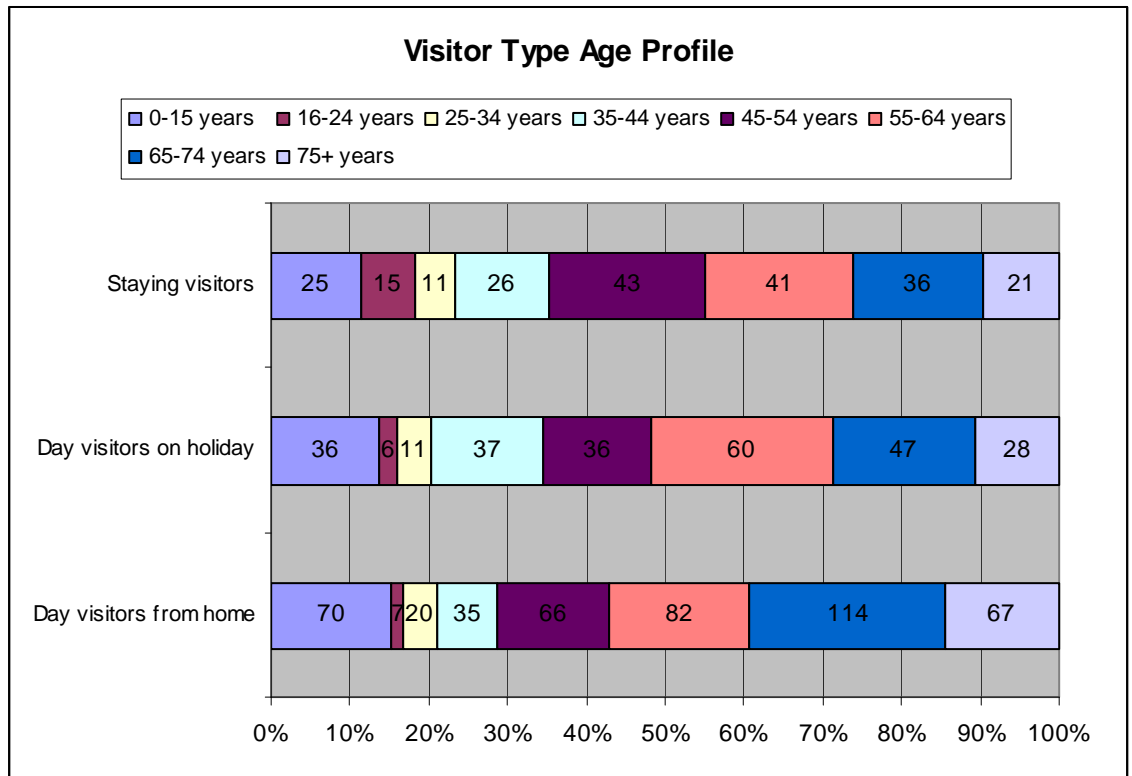
	<i>BEXHILL %</i>	<i>ALL RESORTS (AVERAGE %)</i>	<i>ALL DESTINATIONS (AVERAGE %)</i>
YES	2	12	9
NO	98	88	91

2.4 AGE

Given the high proportion of groups containing adults only, it is not surprising to find that only 14% of visitors were children. The age of visitors is largely concentrated towards the older ages with 54% of visitors aged above 55 years. Only 7% of visitors were between 16 and 34 years.



Day visitors have the older age groups, yet also have the largest proportion of children. There are very few teenagers in all groups.



2.5 SOCIO-ECONOMIC GROUP

The socio-economic profile of visitors to Bexhill is shown in Table 5. This profile is based on the occupation of the highest earner in the interviewee's household and takes into account the previous occupation of those who were retired.

A larger proportion of visitors to Bexhill were in the ABC1 profile (57%), than the average for all resorts (43%).

TABLE (5): SOCIO-ECONOMIC PROFILE (ALL VISITORS)

	<i>BEXHILL %</i>	<i>ALL RESORTS (AVERAGE %)</i>	<i>ALL DESTINATIONS (AVERAGE %)</i>
AB	16	14	23
C1	41	29	34
C2	28	30	24
DE	15	27	19

The table below shows the employment status of the respondent's household chief income earner. It can be seen that nearly all respondents were employed full time or were retired.

TABLE (6) Employment Status

Employed full time	44.8%
Retired	44.2%
Employed part time	5.2%
Self-employed	4.4%
Unemployed	0.8%
Full-time student living at home	0.3%
Full-time living away from home	0.3%

2.6 ORIGIN OF VISITORS

The vast majority (95.4%) of visitors were domestic. As would be expected the majority of visitors are from the South East region and London. The table below shows the origin of domestic visitors.

TABLE (7) County of Origin

Kent	27.20%
East Sussex	20.40%
G. London	10.50%
Surrey	5.10%
West Sussex	4.50%
Essex	3.70%
Hants	2.80%
Herts	2.50%
Lancs	2.30%
Middlesex	2.30%
Northants	1.70%
West Midlands	1.70%
Beds	1.10%
Berks	1.10%
Bucks	1.10%
Notts	1.10%
Derbyshire	0.80%
Oxon	0.80%
Somerset (including Bristol)	0.80%
Wilts	0.80%
Scotland	0.80%
Devon	0.60%
Dorset	0.60%
G. Manchester	0.60%
Wales - South	0.60%
Warwickshire	0.60%
Cambs	0.30%
Cheshire	0.30%
Cleveland (Tees Valley)	0.30%
Cumbria	0.30%
Durham	0.30%
I.O.W.	0.30%
Norfolk	0.30%
Shropshire	0.30%
Suffolk	0.30%
Wales - North	0.30%
Worcs	0.30%
Yorkshire - South	0.30%
Yorkshire - West	0.30%

4.6% of visitors were from abroad. The table below shows the country of origin, with the largest proportion from Europe.

TABLE (8) Country of Origin	
Germany	17.60%
France	17.60%
U.S.A.	11.80%
Rep. of Ireland	11.80%
Belgium	5.90%
Denmark	5.90%
Italy	5.90%
Netherlands	5.90%
Australia	5.90%
New Zealand	5.90%
Russia	5.90%

27% of visitors were staying in towns outside of Bexhill. The table below documents which towns these were. The majority (95%) of visitors staying outside of Bexhill were staying in East Sussex and largely within 1066 Country. Otherwise visitors were staying in Kent (3%), Surrey (1%) or West Sussex (1%).

TABLE (9) Town Staying In	
Eastbourne	21.20%
Battle	16.20%
Hastings	11.10%
St Leonards	10.10%
Pevensey Bay	6.10%
Crowhurst	4.00%
Rye	3.00%
Catsfield	3.00%
Hailsham	3.00%
Ore	2.00%
Sidley	2.00%
Polegate	2.00%
Wartling	1.00%
Mark Cross	1.00%
Balcombe	1.00%
Tunbridge Wells	1.00%
Hellingley	1.00%
Little Common	1.00%
Ninfield	1.00%
Westham	1.00%
Lewes	1.00%
Normans Bay	1.00%
East Ockley	1.00%
Crowborough	1.00%
Ashburton	1.00%
Marden	1.00%
Northiam	1.00%
Uckfield	1.00%

2.7 ACCOMMODATION

The vast majority (66%) of staying visitors in Bexhill were staying at the home of friends or relatives. Hotels and B&Bs (15%) were the next most popular choice of accommodation, but still represent a relatively low proportion especially in comparison to all resorts (48%) and all destinations (44%).

The specific types of accommodation stayed in are shown in Table 10.

	<i>BEXHILL %</i>	<i>ALL RESORTS (AVERAGE %)</i>	<i>ALL DESTINATIONS (AVERAGE %)</i>
HOTEL	6	32	31
B&B/GUEST HOUSE	9	16	13
PUB/INN	0	0	1
RENTED SELF CATERING	8	11	6
TOURING CARAVAN	6	4	3
STATIC CARAVAN – OWNED	0	2	1
STATIC CARAVAN - RENTED	1	7	3
CAMPING	1	2	2
YOUTH HOSTEL	0	0	2
NARROWBOAT/BOAT/YACHT	0	0	1
HOLIDAY CENTRE	0	7	3
LANGUAGE SCHOOL	0	0	0
HOME OF FRIEND OR RELATIVE	66	16	31
TIMESHARE	0	0	0
UNIVERSITY	0	0	2
OTHER	3	1	2

3. CHARACTERISTICS OF VISIT

3.1 PURPOSE OF VISIT

The majority of visitors (76%) were visiting Bexhill for leisure or holiday purposes; however a significant proportion were visiting friends and relatives (21%).

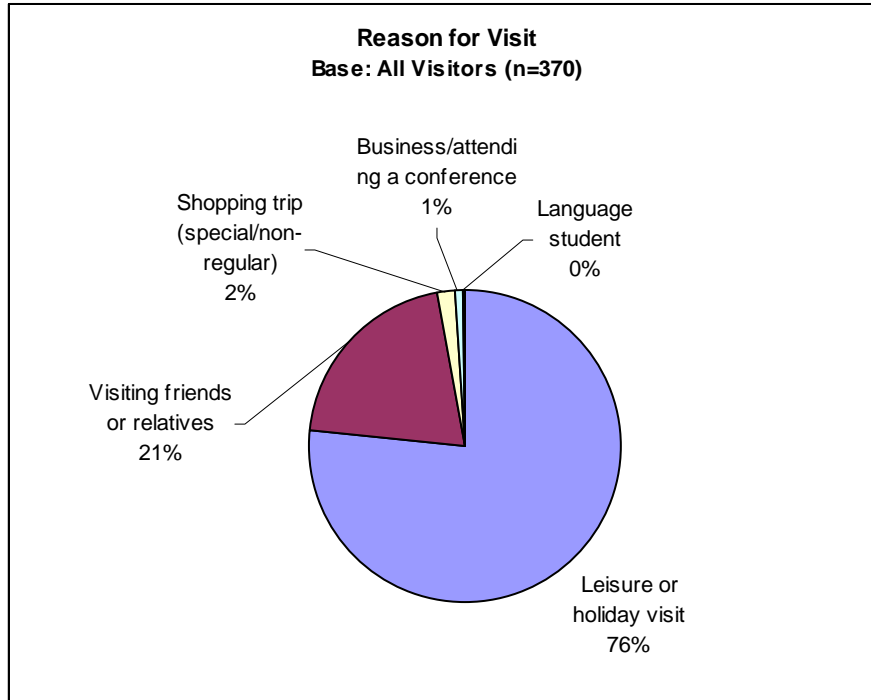


Table 11 compares Bexhill with all resorts and all destinations. In comparison to other resorts Bexhill has more visitors staying with friends and relatives.

TABLE (11): PURPOSE OF VISIT (ALL VISITORS)

	<i>BEXHILL %</i>	<i>ALL RESORTS (AVERAGE %)</i>	<i>ALL DESTINATIONS (AVERAGE %)</i>
LEISURE/ HOLIDAY	77	91	74
VFR	21	5	11
SPECIAL SHOPPING TRIP	2	2	11
BUSINESS/ CONFERENCE	1	1	3
LANGUAGE STUDENT	0	0	1
OTHER	0	0	1

3.2 LENGTH OF STAY

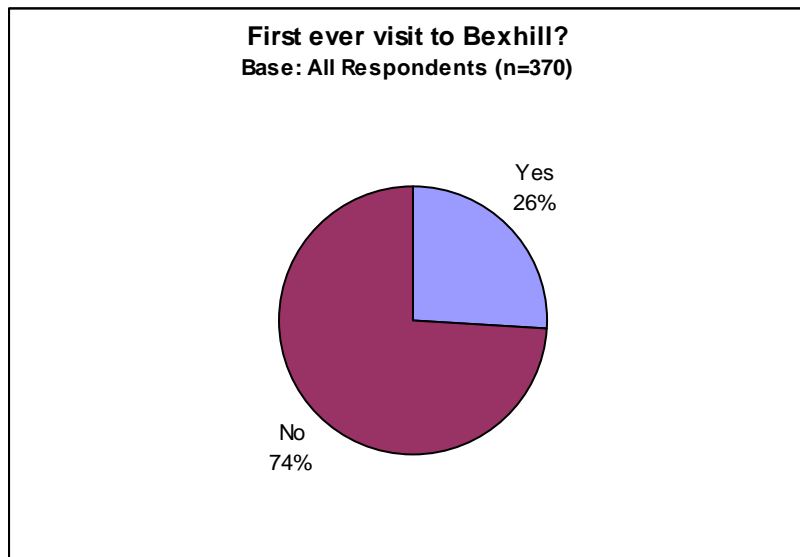
The table below compares visitors to Bexhill length of stay with all resorts and all destinations. Day visitors to Bexhill stayed for less time than visitors to all resorts and destinations. The length of stay of staying visitors is similar for all categories.

TABLE (12): AVERAGE LENGTH OF STAY (ALL VISITORS)

	BEXHILL %	ALL RESORTS (AVERAGE %)	ALL DESTINATIONS (AVERAGE %)
DAY VISIT (HOURS)	3.01	5.03	4.62
STAYING VISIT (NIGHTS)	6.51	6.34	6.11

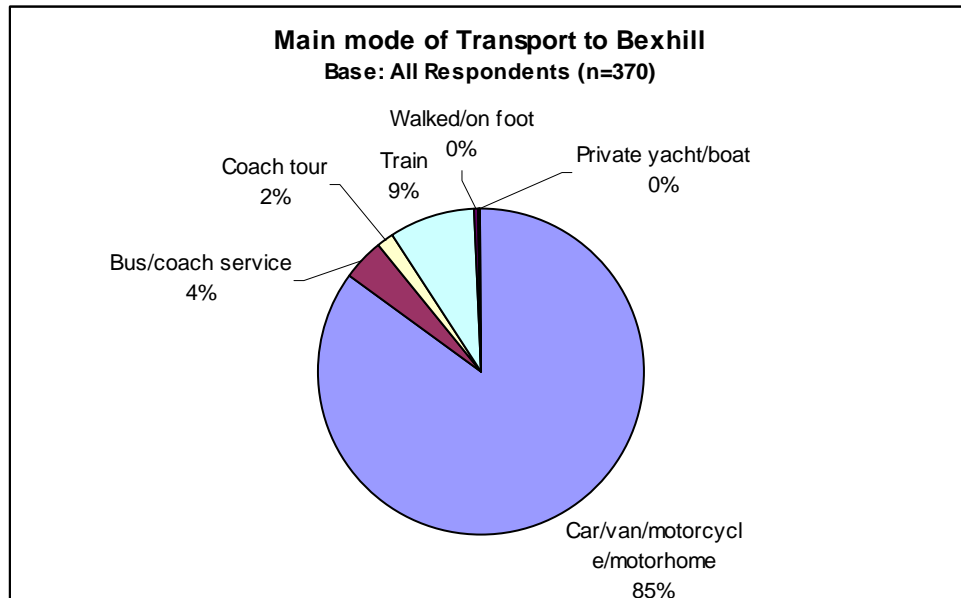
3.3 REPEAT VISIT

Approximately three-quarters of visitors had visited Bexhill on a previous occasion to this visit, as is demonstrated in the chart below. On average visitors had 8.62 previous day trips and 3.82 previous staying visits in Bexhill. The results for all resorts (81% visited before) and all destinations (75% visited before) are similar to Bexhill.



3.4 MAIN FORM OF TRANSPORT USED

As shown in the chart below, the majority of visitors to Bexhill travelled by car, van, motorcycle or motor home. Although the percentage of walking or travelling by private yacht or boat is expressed at 0%, one respondent stated this as a mode of transport for each category.



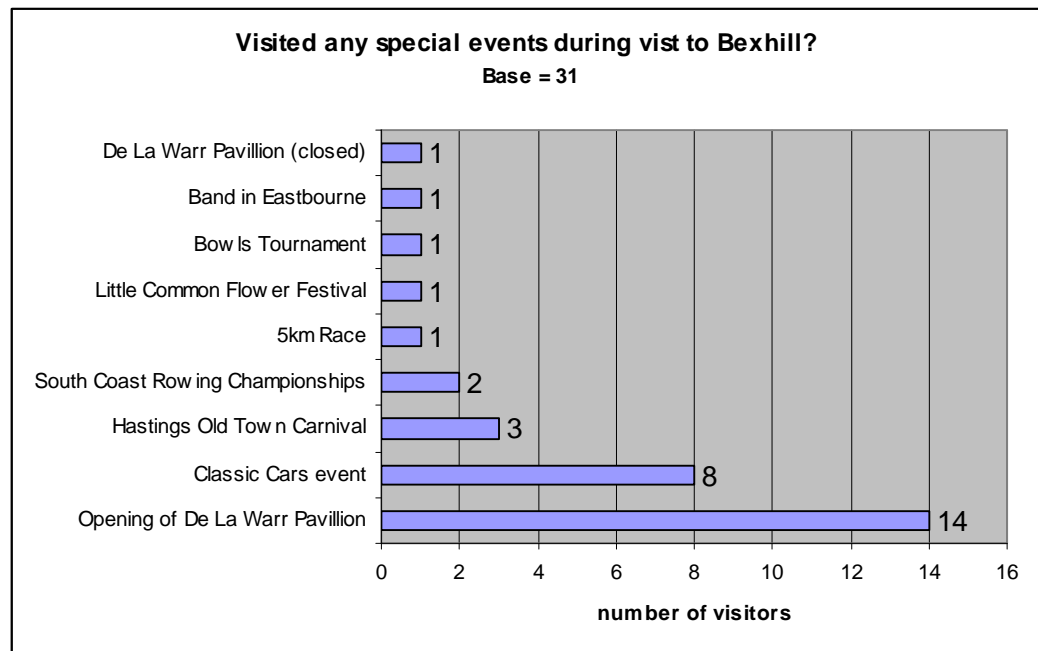
The table below compares Bexhill with all resorts and all destinations. Other resorts had more visitors walking and travelling as part of a coach tour than Bexhill. Otherwise all categories show car, van, motorcycle or motor-home as being the main type of transport used.

TABLE (13): TYPE OF TRANSPORT (ALL VISITORS)

	<i>BEXHILL %</i>	<i>ALL RESORTS (AVERAGE %)</i>	<i>ALL DESTINATIONS (AVERAGE %)</i>
CAR / VAN / MOTORCYCLE / MOTORHOME	85	64	61
BUS/COACH SERVICE	4	9	13
COACH TOUR	2	8	6
BICYCLE	0	0	0
TRAIN/TRAM	9	8	12
WALKED	0	9	6
OTHER	0	2	3

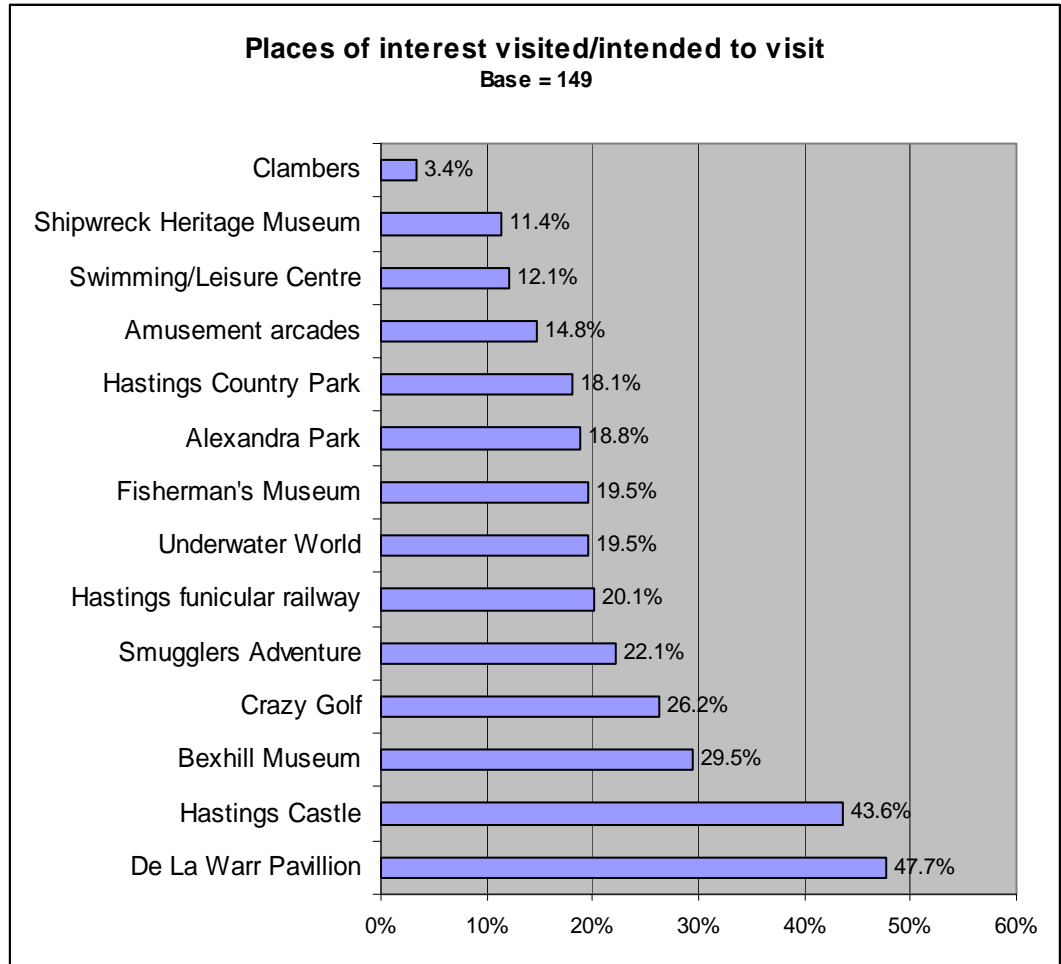
3.5 VISITING SPECIAL EVENTS

Only 8.5% of respondents were visiting a special event in Bexhill during their visit. Of these the majority were visiting the opening of the De La Warr Pavilion.



3.6 PLACES OF INTEREST VISITED

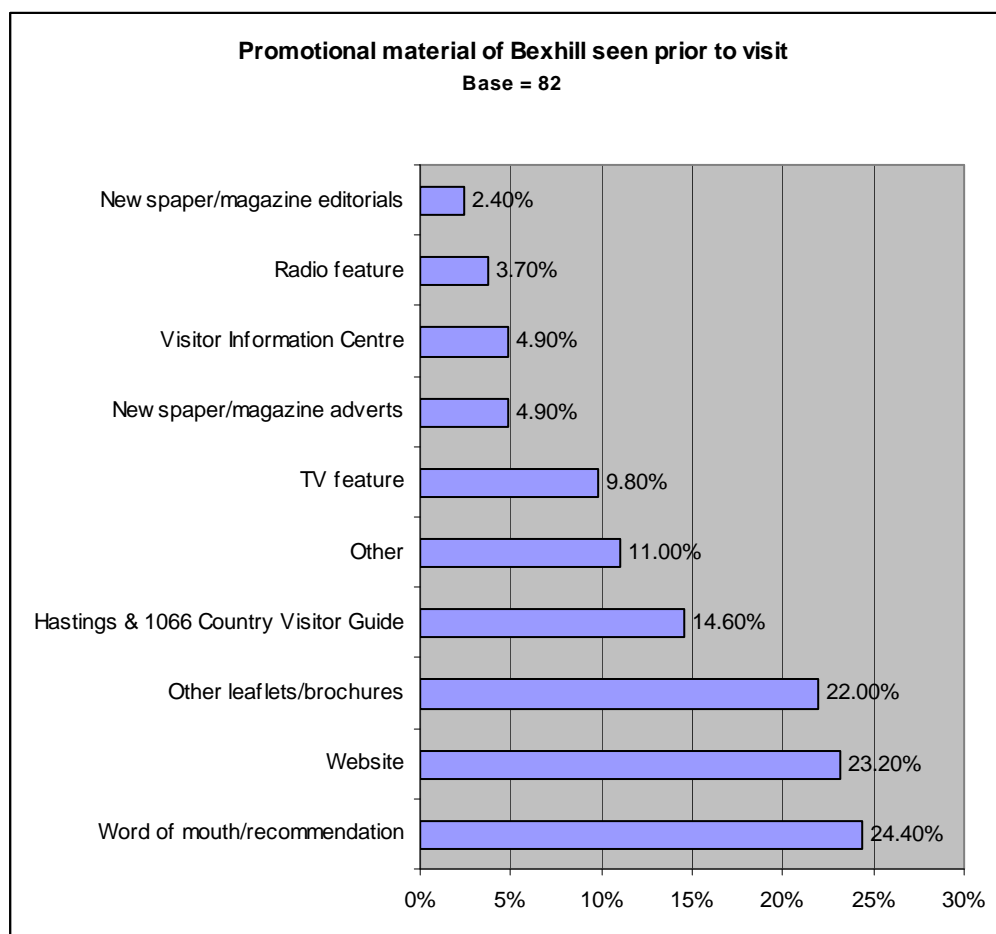
The most popular places to visit whilst in Bexhill were the De La Warr Pavilion (47.7%), Hastings Castle (43.6%) and Bexhill Museum (29.5%). All responses are shown in the chart below.



4. VISITOR AWARENESS AND PERCEPTION

4.1 PROMOTIONAL MATERIAL SEEN PRIOR TO VISIT

The chart below displays the promotional material visitors saw prior to their visit to Bexhill. Marketing media such as websites and brochures were the most frequently used other than word of mouth.



Other types of features seen are shown in the table below.

TABLE (14):
Other type of feature, advertisement or promotion seen

Liked location on map	2
Book	2
BA Magazine	2
RAF Club	1
Wrote to TIC	1
Library brochure	1
Flood defences	1

4.2 WEBSITES CONSULTED

The websites that were seen prior to respondents visit to Bexhill are shown in the table below. The most seen websites were 1066 Country and Bexhill-on-Sea Website.

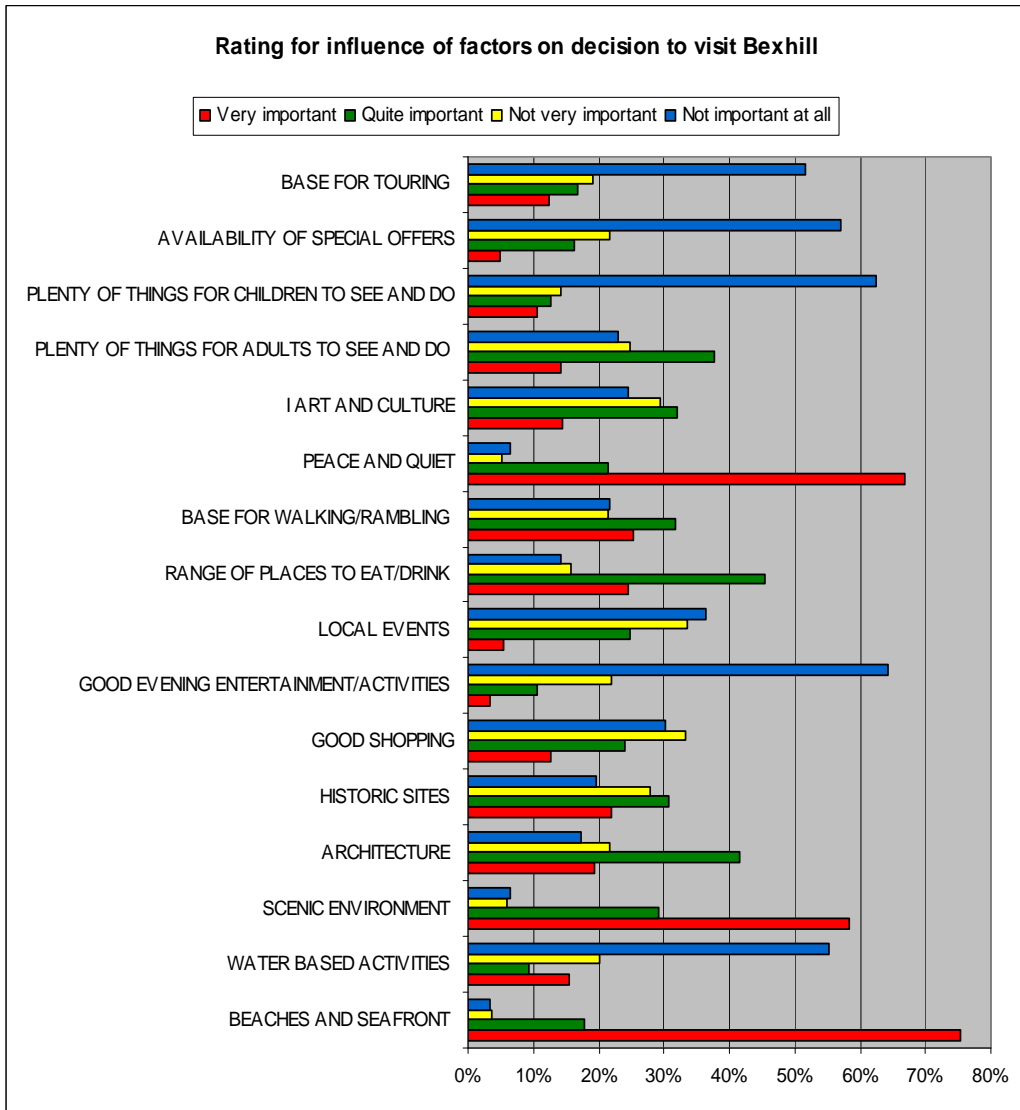
**TABLE (15):
Named website seen for Bexhill prior
to this visit**

1066 Country	6
Bexhill-on-Sea	4
Visit Hastings	3
Battle Tourism	1
Visit England/Britain	1
Visit Sussex	3
Hotels and B&Bs	1
Bexhill Observer	1
Bexhill Today	1
De La Warr Pavillion.com	1

4.3 INFLUENCE OF FACTORS ON DECISION TO VISIT BEXHILL

The most important factors that influenced visitors to visit Bexhill were beaches and seafront (75%), peace and quiet (67%) and the scenic environment (58%).

The factors that were considered not important at all were good evening entertainment (64%), plenty of things for children to see and do (62.5%) and water based activities (55%). These may all be attributed to an older age profile and small proportion of visitors with children in their group.



4.4 FEATURES OR IMAGES OF 1066 COUNTRY

Respondents were asked to give the first, second and third feature or image that came to mind when they thought of 1066 Country. The combined results are shown in the table below.

The main images and features are related to history and the Battle of Hastings. Other than this, 17 respondents thought of the sea and beach and 13 visitors thought of scenery, countryside and open spaces.

**TABLE (16) Feature or Image of 1066 Country
Base (351)**

Battle of Hastings	51.30%
Battle	26.50%
Hastings	21.90%
William the Conqueror	9.40%
King Harold/arrow in his eye	6.00%
Abbey	5.70%
Castles	4.80%
Sea/beach	4.80%
Pevensey	4.30%
Normans/Saxons/soldiers	3.70%
Scenery/countryside/open spaces	3.70%
History	3.10%
Food/drink/wine	1.40%
Peace and quiet	1.40%
Clean	1.40%
De La Warr Pavilion	1.10%
Bexhill	0.90%
Advertisements	0.90%
Normans Bay	0.90%
English seaside towns	0.90%
Hastings Pier/boats	0.90%
Fish shops/fishing	0.60%
Sun/climate	0.60%
Old people	0.60%
Britain	0.60%
Rye	0.60%
Senlac Hill	0.60%
1066 trail	0.30%
Relatives	0.30%
Signposts	0.30%
Science centre	0.30%
Holidays	0.30%
Walks	0.30%
Four seasons	0.30%
East Sussex	0.30%
Horses	0.30%
Mermaid Hold	0.30%
Parking	0.30%
Motor racing	0.30%
Medieval Market	0.30%
Thatched cottages	0.30%
Eastbourne	0.30%
Sissinghurst Gardens	0.30%
Flowers	0.30%

4.5 PARTICULAR LIKES ABOUT BEXHILL

Visitors were asked what they particularly liked about Bexhill. The results are shown in the table below.

TABLE (17) Particular Likes About Bexhill	
Base: 367	
Peaceful/quiet/lack of crowds	49.00%
Seafront/beach/sailing	38.70%
Cleanliness/well maintained	16.10%
Atmosphere	7.10%
Old fashioned/unspoilt (not tacky)	5.70%
Shops	4.60%
Parking	4.40%
Sea air	3.80%
Easy for walking	3.50%
Relatives/friends	3.30%
People	2.70%
Family friendly	2.20%
Weather	1.60%
De La Warr Pavilion	1.60%
Location/central/good sightseeing base	1.60%
Easy access/wide pavements	1.40%
Nostalgia/birth of motor racing/history	1.40%
Small and compact	1.10%
Architecture	1.10%
Few amusements	0.80%
Very English/individual	0.80%
Food	0.80%
Safe	0.50%
Gardens/flowers	0.50%
Accommodation	0.50%
Peaceful cemetery	0.50%
New developments	0.30%
Seating	0.30%
Crazy golf	0.30%
Scenery	0.30%
Reasonable prices	0.30%
General amenities	0.30%

4.6 DISLIKES ABOUT BEXHILL

Visitors were asked if anything had spoilt their visit to Bexhill. 29% of respondents stated the factors that are documented in the table below.

TABLE (18) Anything that spoilt visit to Bexhill	
Base: 107	
De La Warr Pavilion closed	23.40%
Toilets	16.80%
Eating out/poor pubs	8.40%
TIC closed/Lack of information centre	6.50%
Weather	6.50%
Attractions/Crazy golf closed	6.50%
Cyclists/skateboarders	4.70%
Tatty/dirty areas	3.70%

Lack of facilities/access for the disabled	3.70%
Roads/crossings	2.80%
Rude people	2.80%
Lack of things to do	2.80%
Parking	1.90%
Little choice of shops	1.90%
Time constraints	1.90%
New developments/building works	0.90%
Seagulls	0.90%
Changes to the De La Warr Pavilion	0.90%
No promotion of the birth of motor racing	0.90%
Public transport	0.90%
Lack of signs	0.90%
Pebble beach	0.90%
Charge for deckchairs	0.90%
No Jour de Fete	0.90%
Tides	0.90%
Amusements	0.90%
Lack of seating	0.90%
Expensive	0.90%
Lack of facilities in shopping area	0.90%
Traffic	0.90%
No flowers	0.90%
Church closed	0.90%
Accommodation	0.90%
Elderly environment	0.90%

4.7 RECOMMENDING

Only four people stated that they were unlikely to recommend Bexhill as a place to visit. The reasons stated were due to bad food, drunks, toilets, disabled facilities, no transport system and there just being no appeal.

5. VISITOR EXPENDITURE IN BEXHILL

5.1 STAYING VISITORS - BY CATEGORY OF EXPENDITURE

Staying visitors in Bexhill spent far less than the average for all resorts and for all destinations. This spend is less in all categories of expenditure.

TABLE (19): Average expenditure in Bexhill per person - all staying visitors			
Category of expenditure (£)	Average Spend Bexhill 2005	Average spend 'All Resorts'	Average spend -' All Destinations'
Commercial accommodation	£11.37	£24.62	£29.62
Eating/Drinking	£9.39	£11.08	£12.38
Shopping	£4.97	£9.07	£13.79
Entertainment	£0.44	£3.87	£4.15
Travel	£1.55	£2.51	£3.26
Average spend total	£27.72	£51.15	£62.94

5.2 DAY VISITORS - BY CATEGORY OF EXPENDITURE

Day visitors had a lower average spend than staying visitors. This is largely attributed to accommodation expenditure by staying visitors, but day visitors also spend less on all of the other categories, especially shopping.

Day visitors in Bexhill spend less than the average for all resorts and all destinations and in all categories of expenditure.

TABLE (20): Average expenditure in Bexhill per person- all day visitors			
Category of expenditure (£)	Average Spend Bexhill 2005	Average spend 'All Resorts'	Average spend -' All Destinations'
Eating/Drinking	£4.96	£7.11	£6.60
Shopping	£2.44	£7.36	£11.48
Entertainment	£0.22	£2.83	£2.51
Travel	£1.38	£2.51	£2.58
Average spend total	£9.00	£19.81	£23.17

6. VISITORS' OPINIONS

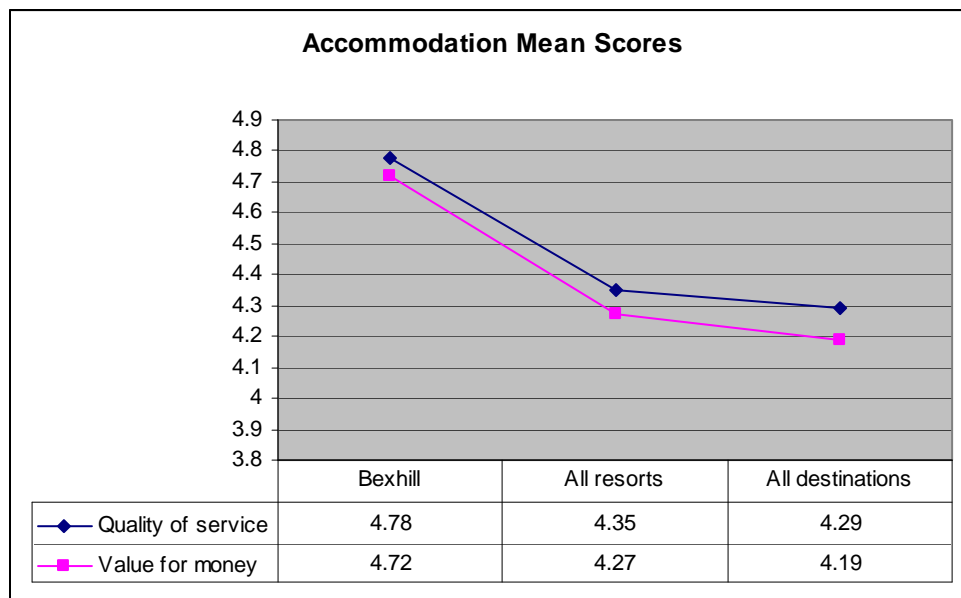
6.1 ACCOMMODATION

Visitors were very impressed with the quality of service found whilst staying in commercial accommodation in Bexhill, with 100% of all visitors rating quality of service as either 'Good' or 'Very good'. This provides an overall satisfaction score of 4.78 for quality of service and is higher than the all resorts and all destinations scores.

Similarly, visitors were impressed with the value for money of accommodation in Bexhill with 97% of all visitors rating it as either 'Good' or 'Very good'. Again this is higher than for all resorts and all destinations.

TABLE (21): Accommodation ratings

	Quality of service	Value for money
Very good	78%	75%
Good	22%	22%
Average	0%	3%
Poor	0%	0%
Very Poor	0%	0%



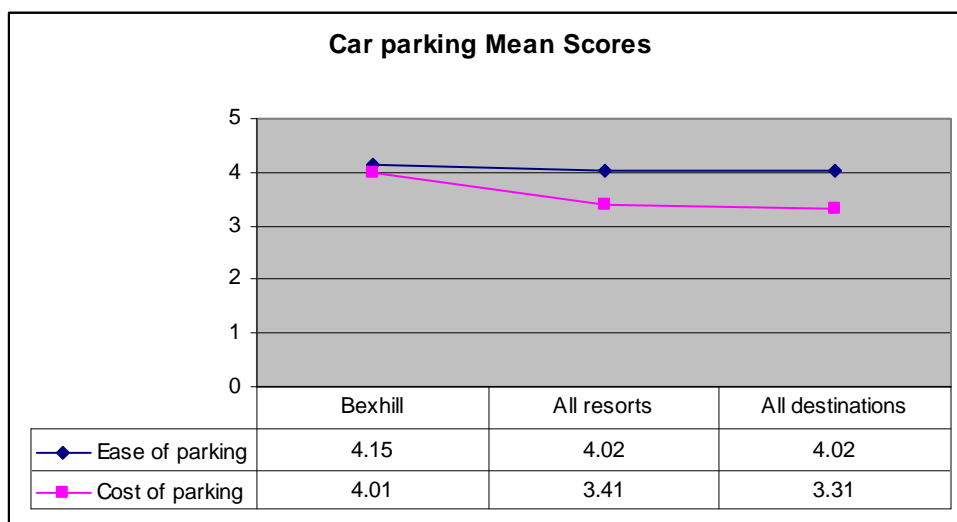
6.2 CAR PARKING

The majority of visitors using car parks rated the ease in finding a parking space as 'Good' or 'Very good' (79%). Bexhill's score for ease of parking was 4.15, higher than the benchmark averages for all resorts and all Destinations.

Cost of parking was considered to be mostly 'reasonable' or 'very reasonable' (72%) and 18% stating it was about average. The mean score was higher than the benchmarking results.

TABLE (22) Car parking ratings

	Ease of parking		Cost of parking
Very easy	55%	Very reasonable	41%
Quite easy	24%	Reasonable	31%
Average	6%	About average	18%
Difficult	10%	Quite expensive	9%
Very difficult	5%	Very expensive	1%



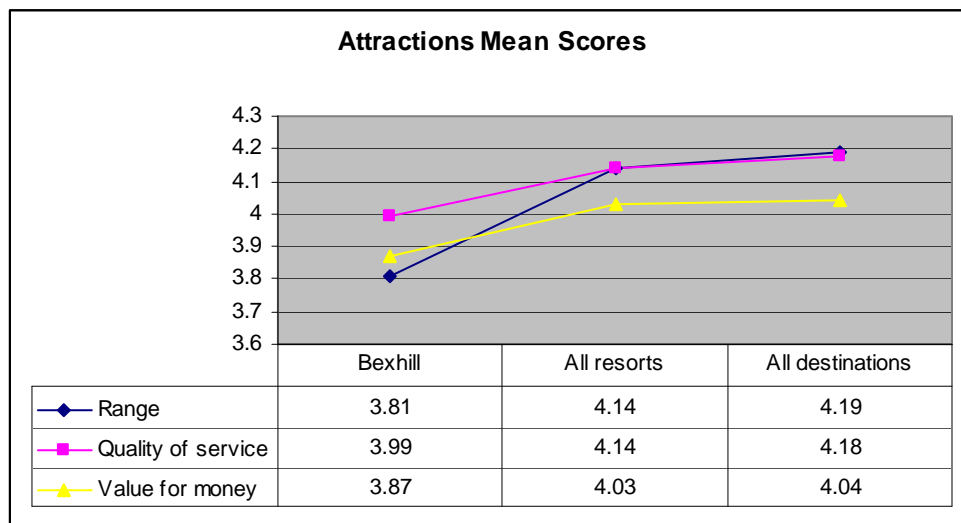
6.3 ATTRACTIONS

Over 60% of visitors rated the range of, and quality of services experienced and value for money at attractions and places to visit as 'Good' or 'Very good'. Between 24% and 30% considered these categories to be 'average'.

The mean opinion scores were similar for each category, with quality of service rating the highest (3.99). All of these mean scores are lower than for the average for all resorts and all destinations.

TABLE (23) Attraction ratings

	Range of Attractions	Quality of service	Value for money
Very good	25%	32%	27%
Good	39%	40%	39%
Average	28%	24%	30%
Poor	6%	2%	3%
Very poor	1%	2%	1%

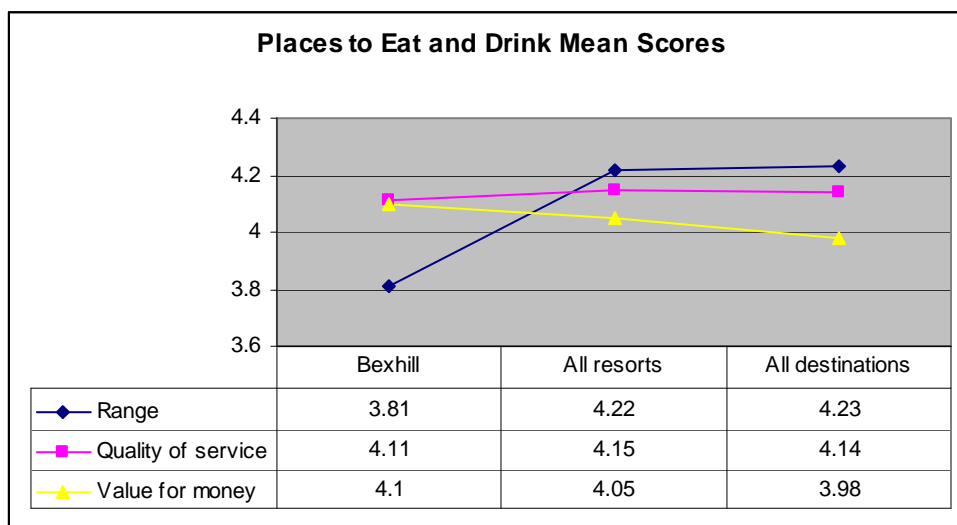


6.4 PLACES TO EAT & DRINK

Visitors' satisfaction with the range of places to eat and drink was mostly 'good' (43%). In comparison with all resorts and all destinations Bexhill's score was lower. This was similar for quality of service although the mean score is not very different from all resorts and all destinations. The mean score for value for money was higher in Bexhill than for all resorts and all destinations.

TABLE (24) Places to eat & drink ratings

	Range of ...	Quality of service	Value for money
Very good	24%	38%	35%
Good	43%	39%	42%
Average	25%	21%	21%
Poor	6%	1%	1%
Very poor	2%	1%	1%



6.5 SHOPS

Visitors interviewed were asked to score Bexhill's shops on three areas: range, quality of the shopping environment and the quality of service received in the shops.

The average opinion score achieved for range of shops was 3.61, with 55% rating the range as 'Good' and 'Very good'. The average score for the quality of the shopping environment was 3.76, with 64% rating the shopping environment as 'Good' and 'Very good'. 74% of those surveyed during this period considered the quality of service provided in the shops to be either 'Good' or 'Very good', providing an average score of 3.96. All three aspects rated received lower mean scores than for all resorts and all destinations.

TABLE (25) Retail ratings

	Range of shops	Quality of shopping environment	Quality of service of shops
Very good	21%	23%	26%
Good	34%	41%	48%
Average	34%	27%	23%
Poor	8%	7%	3%
Very poor	3%	1%	0%



6.6 SIGNAGE/EASE OF FINDING YOUR WAY AROUND

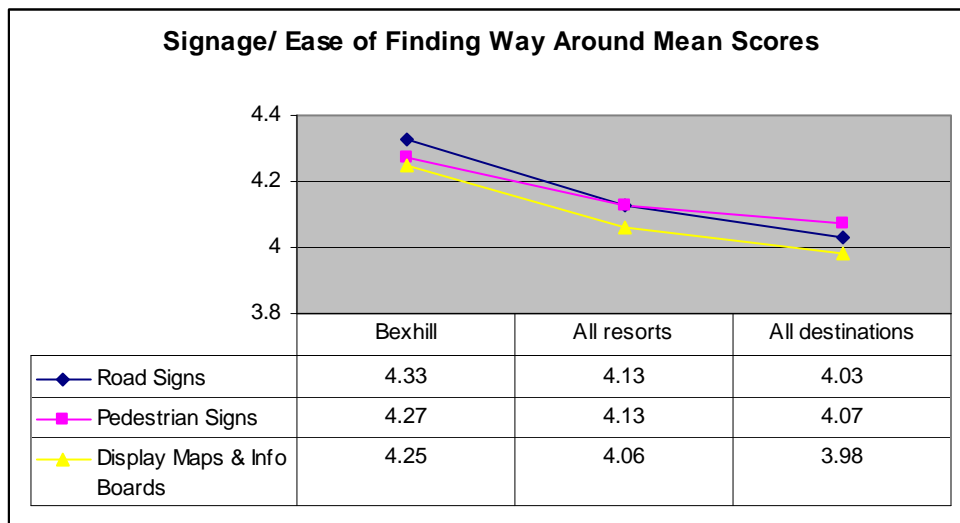
Visitors were asked about three separate aspects of finding their way around the town: road signs, pedestrian signs and display maps and information boards.

The average opinion score for road signs was a positive 4.33. The road signs were rated as 'Very good' by 47% of those who arrived by car. This score was comparable to the average score for pedestrian signs which was 4.27, and the average opinion score for display maps and information boards at 4.25. Those interviewed that had used pedestrian signs also rated them as 'Very good' (44%). 41% of visitors to Bexhill considered the display maps and information boards to be 'Very Good'.

On all three aspects measured - road signs, pedestrian signs and display maps & information boards, Bexhill's performance is higher than all resorts and all destinations in general (see satisfaction scores below).

TABLE (26): Ratings on visitor signs and navigation

	Road signs	Pedestrian signs	Display maps & info boards
Very good	47%	44%	41%
Good	44%	41%	46%
Average	6%	12%	12%
Poor	3%	2%	2%
Very poor	0%	0%	0%



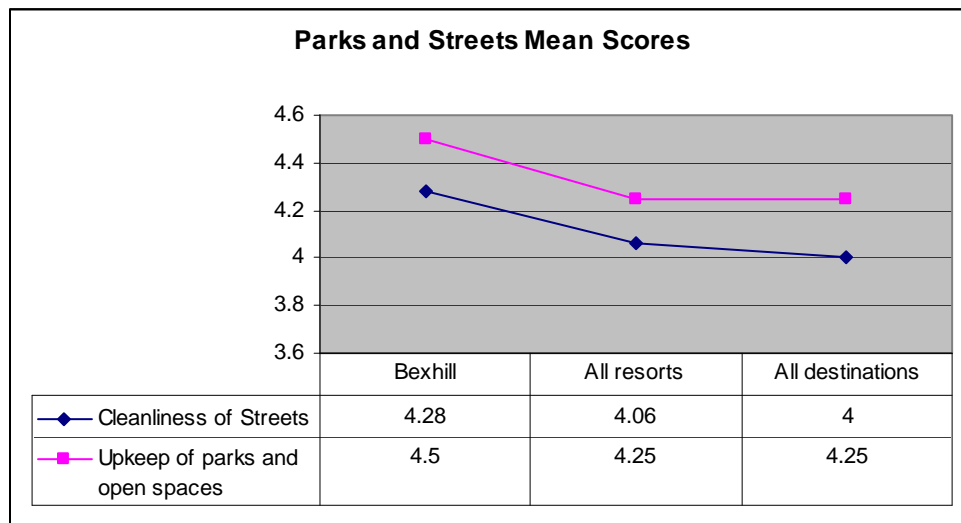
6.7 PARKS AND STREETS

The average score for cleanliness of streets was 4.28, with 86% of those interviewed rating the cleanliness to be 'Good' or 'Very good'. This is higher than for all resorts and all destinations.

The average score for the upkeep of parks and open spaces received a higher average score of 4.50, with 55% of those interviewed rating this as 'Very good'.

TABLE (27) Parks and Streets ratings

	Cleanliness of streets	Upkeep of parks & open spaces
Very Good	43%	55%
Good	43%	41%
Average	12%	4%
Poor	1%	0%
Very poor	1%	0%



6.8 PUBLIC TOILETS

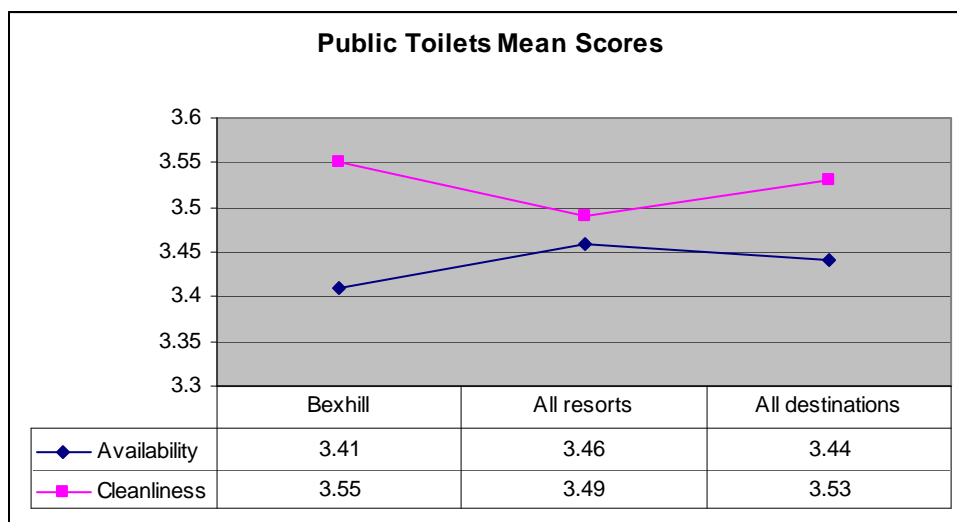
In terms of availability of public toilets, 30% of visitors rated it as 'Good' and 21% of visitors rated it as 'Very good', providing an average opinion scoring of 3.41.

35% of visitors rated the cleanliness of toilets as 'Good', with a further 25% rating the cleanliness of toilets as 'Very good', providing an average score of 3.55,

Although the line graph below creates an image of disparity in scores with resorts and all destinations, the results are in fact extremely close.

TABLE (28) Ratings on public toilets

	Availability of public toilets	Cleanliness of public toilets
Very Good	21%	25%
Good	30%	35%
Average	27%	21%
Poor	14%	11%
Very poor	8%	9%



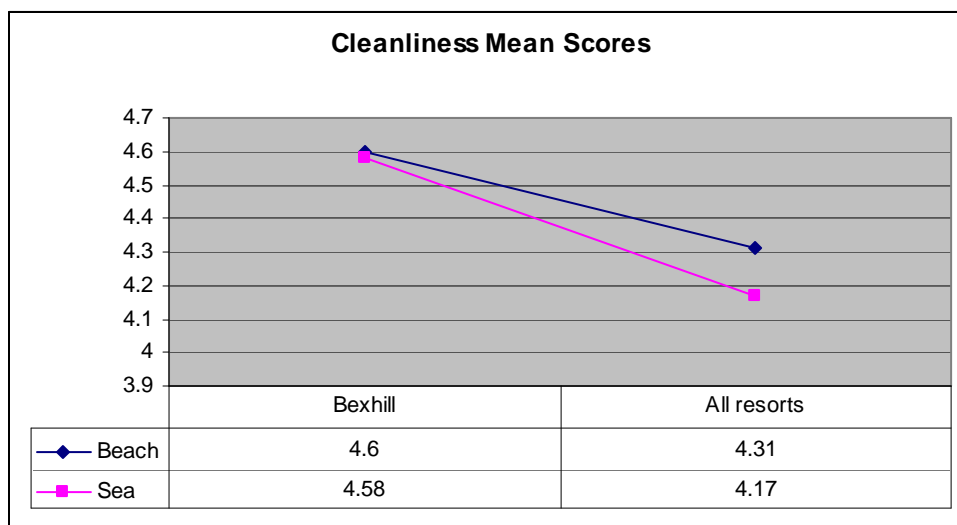
6.9 CLEANLINESS OF SEA AND BEACH

Visitors to Bexhill were asked how they rated the cleanliness of the sea and the beach. The beach was rated extremely well with 64% rating it as 'Very good' and 33% as 'Good'. Similarly the cleanliness of the sea rated very well with 96% stating it was 'Very good or 'Good'.

The mean scores for the cleanliness of the beach and sea in Bexhill were higher than for all resorts.

TABLE (29) Cleanliness of sea and beach

	Cleanliness of Beach	Cleanliness of Sea
Very good	64%	62%
Good	33%	34%
Average	3%	54%
Poor	1%	0%
Very Poor	0%	0%

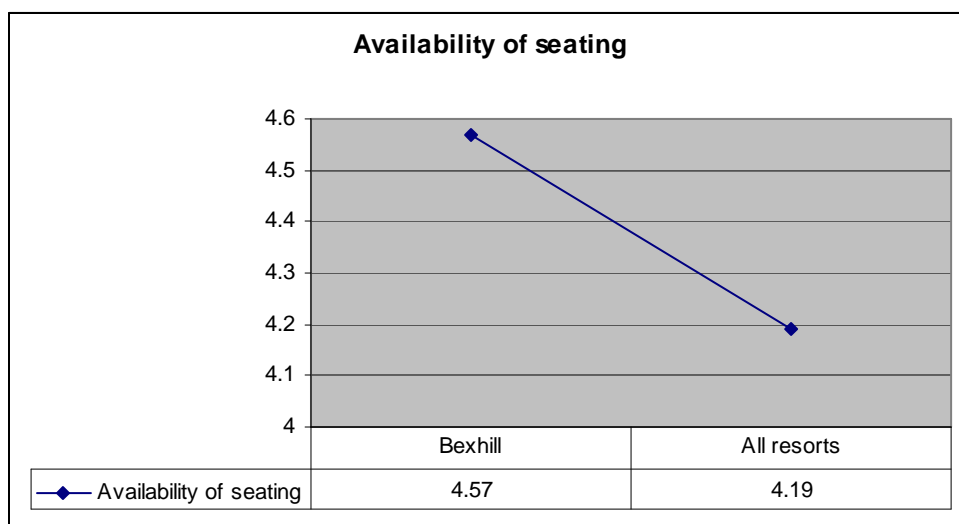


6.10 PUBLIC SEATING

Visitors to Bexhill were asked to rate the availability of public seating. This was rated as good overall with 67% of visitors rating it as 'Very good' and a mean score of 4.57. This is higher than the score for all resorts of 4.19.

TABLE (30) Public Seating Ratings

	Availability
Very good	67%
Good	26%
Average	5%
Poor	1%
Very Poor	1%

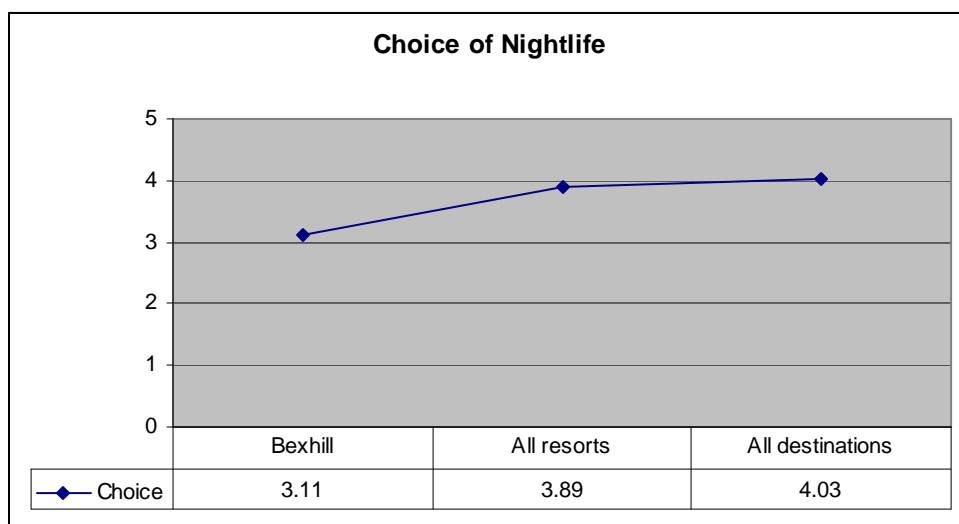


6.11 CHOICE OF NIGHTLIFE

The ratings for choice of nightlife in Bexhill were varied with 24% stating it was 'Very poor' and 28% rating it as 'Very good'. The mean score was lower than all resorts and all destinations.

TABLE (31) Nightlife Ratings

	Choice
Very good	28%
Good	17%
Average	18%
Poor	13%
Very Poor	24%



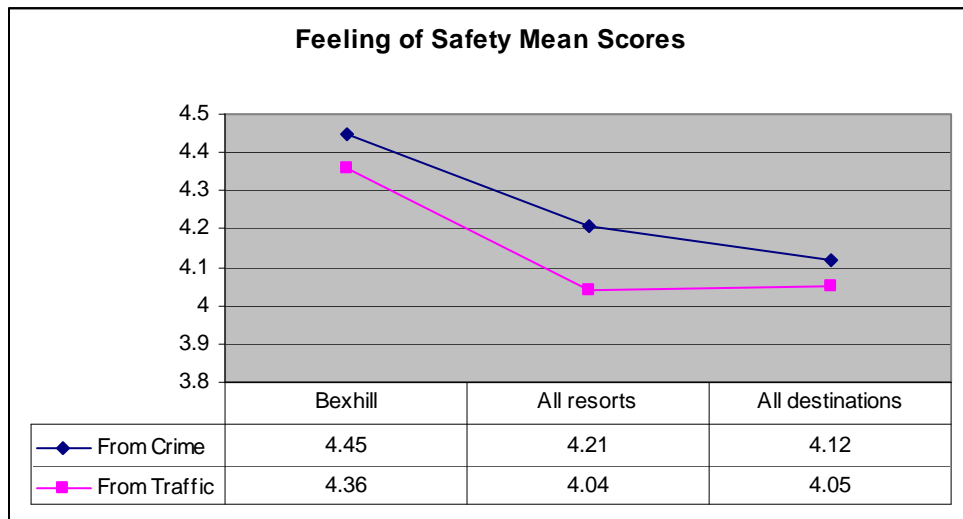
6.12 FEELING OF SAFETY

Bexhill rates very well for feeling of safety. Feeling of safety from crime had an average score of 4.45, higher than for all resorts and all destinations.

Feeling of safety from traffic similarly rated well with a mean score of 4.36, higher than all resorts and all destinations.

TABLE (32) Safety

	Feeling Safe from crime	Feeling safe from Traffic
Agree strongly	54%	52%
Agree	39%	36%
Neither disagree nor agree	6%	9%
Disagree	1%	3%
Disagree strongly	0%	1%

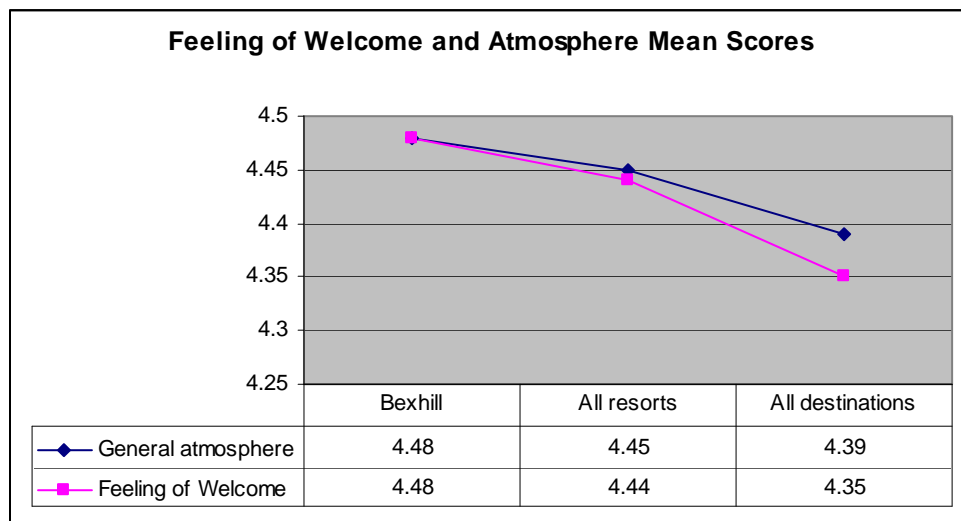


6.13 GENERAL ATMOSPHERE & FEELING OF WELCOME

The general atmosphere and feeling of welcome in Bexhill rated well. 55% of visitors rated the general atmosphere as 'Very good' and 56% rated feeling of welcome as 'Very good'. The mean scores for Bexhill were fractionally higher than for all resorts and all destinations.

Table (33) Opinions on atmosphere and welcome

	General atmosphere of Bexhill	Feeling of welcome in Bexhill
Very good	55%	56%
Good	38%	35%
Average	6%	8%
Poor	1%	0%
Very poor	0%	0%



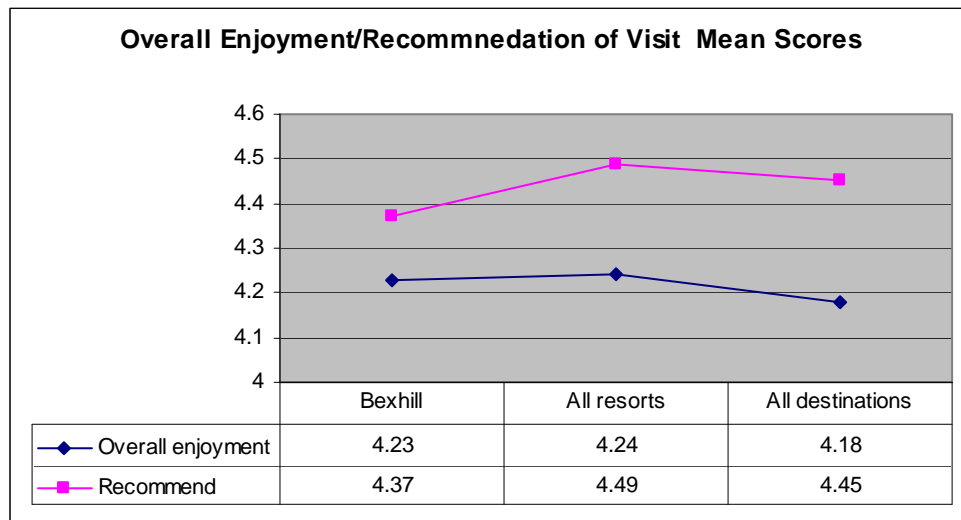
6.14 OVERALL ENJOYMENT OF VISIT/RECOMMENDATION OF VISIT

88% of visitors reported that the overall enjoyment of their visit to Bexhill was either 'High' or 'Very high'. This provides an average score of 4.23, lowered somewhat by the remaining 11% of visitors who described their overall enjoyment as about 'Average'. This compares to the benchmark scores for overall enjoyment of 4.24 for all resorts and 4.18 for all destinations.

83% of all visitors reported that the likelihood of them recommending Bexhill to others was either 'High' or 'Very high'. The average opinion score for recommending Bexhill was 4.37.

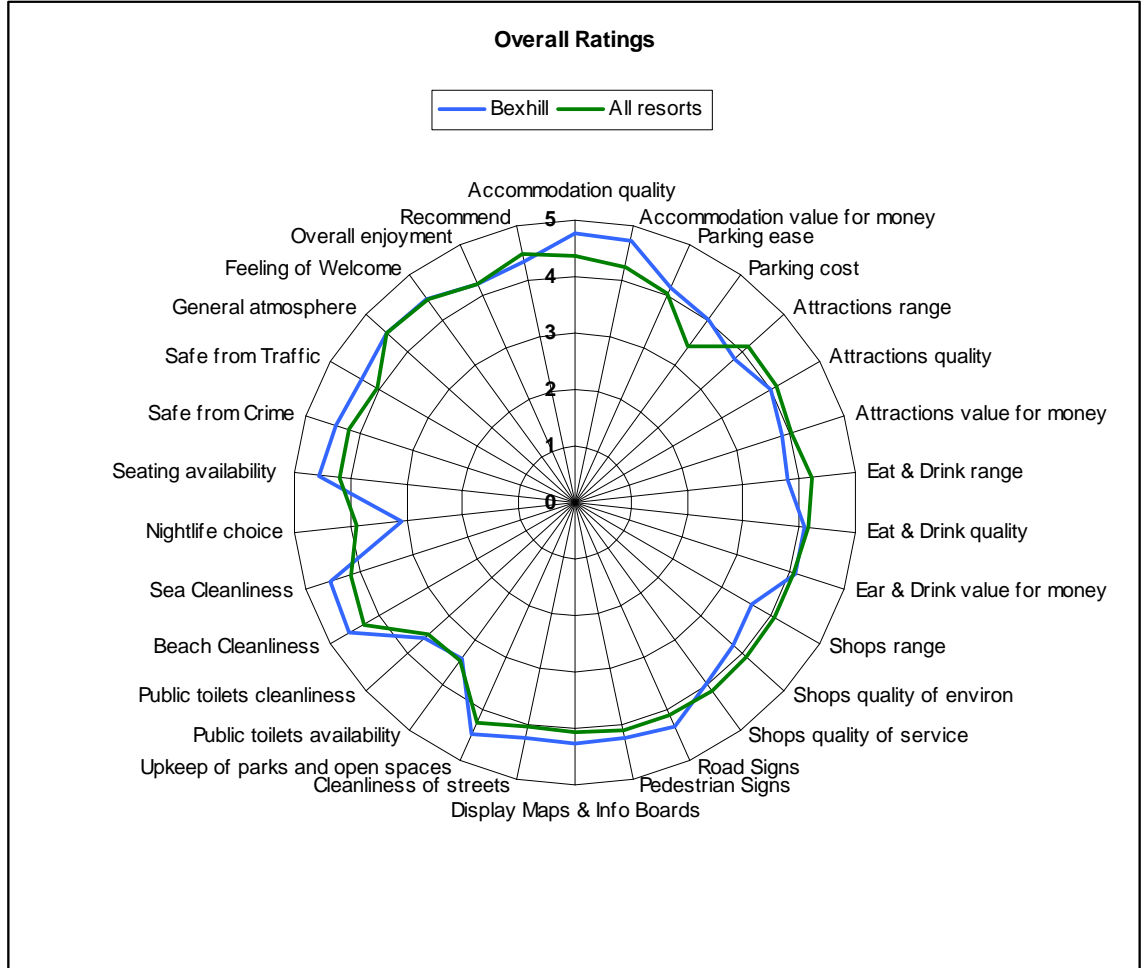
Table (34): Opinions on overall enjoyment

	How would you rate the overall enjoyment of your visit to Bexhill?	How likely are you to recommend Bexhill to someone else?
Very high	35%	57%
High	53%	26%
Average	11%	14%
Low	0%	1%
Very low	0%	1%



6.14 ALL OPINIONS

Bexhill generally fares well in comparison to all resorts. The areas where it falls down are the choice of nightlife and shopping.



APPENDIX 1

DESTINATION BENCHMARKING – BEXHILL 2005

Date: / /05 Interviewer:.....
 Time: 1100-1300 -1 1501-1700 -3 Weather: Wet -1
 1301-1500 -2 1701+ -4 Cloudy (completely overcast) -2
 Sunny (or sunny intervals) -3
 Interview location: Sea front -1
 Outside De La Warr Pavillion -2

Good morning/afternoon. I'm from Tourism South East. We are conducting a survey of visitors to Bexhill. The survey should only take about 10 minutes. Would you be willing to take part?

Refusal 1 2 3 4 5 6 7 8 9 10

1. Do you live in Bexhill or within a 10 mile radius of the town centre?

Yes -1 *Thank and close interview. Do not count to quota. Record interview closures below*
 No -2 *Go to Q2*

Closed 1 2 3 4 5 6 7 8 9 10

2. How close to the end of your visit are you? (READ LIST)

Just going -1
 Will probably stay a little longer -2
 About half way through -3
 Just arrived -4 → Close interview. Do not count to quota

Closed 1 2 3 4 5 6 7 8 9 10

3. What is your MAIN reason for visiting Bexhill? (SHOWCARD 1 – ONE RESPONSE ONLY)

Leisure or holiday visit -1
 Visiting friends or relatives -2
 Shopping trip (special/non-regular) -3
 Business/attending a conference -4

Language student -5

Shopping trip (regular/household) -6 → *Close*
 Work/study here -7 → *interview.*
 Other (specify) -8 → *Do not count*
 to quota

4. Where do you live?
 Home town.....
 County/Country.....

5a. Have you come from home today?
 Yes -1 No -2

5b. Are you returning home today?
 Yes -1 No -2

IF 'YES' TO BOTH Q5A & Q5B GO TO Q7a

6a. Are you/have you been staying overnight in Bexhill?

Yes -1 *Go to Q6c*
 No -2 *Go to Q6b*

6b. If no, where are you staying?

Nearest town..... County.....

6c. How many nights are you staying? (in Bexhill or elsewhere)

nights

6d. What sort of accommodation are you staying in?

Hotel -01
 B&B/Guest House -02
 Pub/Inn -03
 Rented self catering accommodation -04
 Touring caravan -05
 Static caravan –owned -06
 Static caravan – rented -07
 Camping -08
 Youth hostel -09
 Boat/yacht -10
 Holiday centre/village -11
 Host family -12
 Home of friend/relative -13
 Second home -14
 Timeshare -15
 University accommodation -16
 Other (specify) -17

6e. How much have/will you and your party be spending on your accommodation for the duration of your stay (inclusive of breakfast if included in the price of your accommodation)?

£.....
 Put "0" if spent/expect to spend nothing
 Tick box if Don't know/Can't recall/Declined to say

6f. How would you rate the quality of service provided by your accommodation establishment?

(SHOWCARD 2)

- Very poor -1
- Poor -2
- Average -3
- Good -4
- Very Good -5
- Don't know -6

6g. How would you rate your accommodation in terms of value for money?

(SHOWCARD 2)

- Very poor -1
- Poor -2
- Average -3
- Good -4
- Very Good -5
- Don't know -6

NOW GO TO Q8

ASK ALL DAY VISITORS:

7a. Approximately what time did you arrive in Bexhill today?
.....(24 hour clock – to the nearest hour)

7b. Approximately what time do you expect to leave Bexhill today?
.....(24 hour clock – to the nearest hour)

ASK ALL VISITORS

8. Is this your first ever visit to Bexhill?

- Yes -1 **Go to Q10**
- No -2 **Go to Q9**

9. How many times have you visited Bexhill before on a DAY TRIP (last 12 months) and/or STAYING VISIT (last 5 years)?

DAY trips:

STAYING visits:

10. Before this visit did you see any features, advertisements or promotions for Bexhill via any of the following? (**READ LIST – circle all that apply**)

- Website -1 *Go to Q10a*
- Hastings&1066 Country Visitor Guide -2
- Other leaflets/brochures -3
- Word of mouth/recommendation -4
- TV feature -5
- Radio feature -6 *Go to Q10a*
- Newspaper/magazine adverts -7
- Newspaper/magazine editorials -8
- Visitor Information Centre -9
- Other (specify below) -10
-

10a. Which website did you use?

- 1066 Country -1
- Accommodation in Hastings -2
- Visit Hastings -3
- Visit Rye -4
- Bexhill-on-sea -5
- Battle Tourism -6
- Visit South East England -7
- Visit England/Britain -8
- Other (specify below) -9
-

11. Can you tell me what FEATURES or IMAGES first come to mind when you think of 1066 Country? (up to 3)

- 1)
- 2)
- 3)

12. How influential, if at all, were each of the following factors in your decision to visit Bexhill? (SHOWCARD 3)

	Very imp.	Quite imp.	Not very imp.	Not imp. at all
Beaches & seafront				
Water based activities				
Scenic environment				
Architecture				
Historic sites				
Good shopping				
Good evening entertainment/activities				
Local events				
Good range of places to eat/drink				
Base for walking/rambling				
Peace and quiet				
Art and culture				

Plenty of things for adults to see and do				
Plenty of things for children to see and do				
Availability of special offers				
Base for touring				

13. What was the main form of transport you used for the longest part of your journey to Bexhill?

- Car/van/motorcycle/motorhome -1 **Go to Q14a**
- Bus/coach service -2 **Go to Q15**
- Coach tour -3 **Go to Q15**
- Bicycle -4 **Go to Q15**
- Train -5 **Go to Q15**
- Walked/on foot -6 **Go to Q15**
- Private yacht/boat -7 **Go to Q15**
- Other (specify below) -8 **Go to Q15**

.....

14a. Have you used any of the seafront or town centre car parks today?

- Yes -1 Go to Q14b
- No -2 **Go to Q15**

14b. How easy did you find it to park? (READ LIST)

- Very difficult -1 Quite easy -4
- Quite difficult -2 Very easy -5
- Neither particularly difficult or easy -3 Don't know -6

14c. How would you rate the cost of parking in Bexhill? (READ LIST)

- Very expensive -1 Reasonable -4
- Quite expensive -2 Very reasonable -5
- About average -3 Don't know -6

15. Which, if any, of these attractions/places of interest in or around Bexhill have you visited/do you intend to visit DURING THIS VISIT? (SHOWCARD 4)

- De La Warr Pavillion -1
- Hastings Castle -2
- Hastings funicular railway -3
- Bexhill Museum -4
- Underwater World -5
- Shipwreck Heritage Museum -6
- Fisherman's Museum -7
- Clambers -8
- Crazy Golf -9
- Amusement arcades -10
- Swimming/Leisure Centre -11
- Hastings Country park -12
- Alexandra Park -13
- Smugglers Adventure -14

ONLY ASK Q15a IF ONE OF THE DATES IS RELEVANT TO THEIR VISIT – THEN ONLY ASK ABOUT THAT PARTICULAR EVENT. (See briefing notes)

15a. Have you attended any of the following special events during your visit to Bexhill? (SHOWCARD 5)

LIST ALL MENTIONED

16. We are interested in your opinion of various aspects of your visit to Bexhill. On this scale of 1 to 5, where 1 is 'very poor' and 5 is 'very good' (SHOWCARD 2), how would you rate your overall satisfaction with the following:-

- 1 = Very poor 2 = Poor 3 = Average
- 4 = Good 5 = Very good 6 = Don't know

Visitor attractions & other places to visit: Tick if didn't use

- range -1 -2 -3 -4 -5 -6
- quality of service -1 -2 -3 -4 -5 -6
- value for money -1 -2 -3 -4 -5 -6

Places to Eat & Drink: Tick if didn't use

- range -1 -2 -3 -4 -5 -6
- quality of service -1 -2 -3 -4 -5 -6
- value for money -1 -2 -3 -4 -5 -6

Shops: Tick if didn't use

- range -1 -2 -3 -4 -5 -6
- quality of the shopping environment -1 -2 -3 -4 -5 -6
- quality of service -1 -2 -3 -4 -5 -6

Ease of finding way around:

- road signs -1 -2 -3 -4 -5 -6
- pedestrian signs -1 -2 -3 -4 -5 -6
- display maps & info. boards -1 -2 -3 -4 -5 -6

Public toilets: Tick if didn't use

- availability -1 -2 -3 -4 -5 -6
- cleanliness -1 -2 -3 -4 -5 -6

Cleanliness of streets -1 -2 -3 -4 -5 -6

Upkeep of parks & open spaces -1 -2 -3 -4 -5 -6

Beach/sea:

- cleanliness of beach -1 -2 -3 -4 -5 -6
- cleanliness of sea -1 -2 -3 -4 -5 -6

Availability of public seating: -1 -2 -3 -4 -5 -6

Choice of early evening entertainment -1 -2 -3 -4 -5 -6

Overall impression of Bexhill in terms of:

- general atmosphere -1 -2 -3 -4 -5 -6
- feeling of welcome -1 -2 -3 -4 -5 -6

17. Thinking about your visit to Bexhill, how far would you agree or disagree with the following statements on this scale: (SHOWCARD 6)

- 1 = Disagree strongly 4 = Agree
- 2 = Disagree 5 = Agree strongly
- 3 = Neither Disagree nor Agree 6 = Don't know

I feel quite safe from crime -1 -2 -3 -4 -5 -6

in Bexhill

As a pedestrian in Bexhill I feel quite safe from traffic -1 -2 -3 -4 -5 -6

18. Have you been into the Visitor Information Centre in Bexhill during your visit?

Yes -1 Go to Q18a
No -2 Go to Q19a

18a. How would you rate the Visitor Information Centre on a scale of 1 to 5 (SHOWCARD 2), in terms of:

	Very Poor	Poor	Ave	Good	Very Good	Don't Know
Ease of finding	-1	-2	-3	-4	-5	-6
Quality of service	-1	-2	-3	-4	-5	-6
Usefulness of info. received	-1	-2	-3	-4	-5	-6

19a. How would you rate the overall enjoyment of your visit to Bexhill? (READ LIST)

Very low -1 High -4
Low -2 Very high -5
Average -3 Don't know -6

19b. So far this visit, would you say Bexhill has (READ OUT)

Met your expectations -1
Failed to meet your expectations -2
Exceeded your expectations -3

20. What did you like most about Bexhill?

.....
.....

21. What, if anything, spoilt your visit to Bexhill?

.....
.....

22a How likely are you to recommend Bexhill to someone else? (READ LIST)

Very unlikely -1 Go to Q22b
Unlikely -2 Go to Q22b
Possibly -3 Go to Q23
Likely -4 Go to Q23
Very likely -5 Go to Q23
Don't know -6 Go to Q23

IF 'UNLIKELY' ASK:

22b Why do you say that?

.....
.....
.....

ASK ALL:

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

a) Eating & drinking £.....
(in cafes, pubs, restaurants, hotels etc.)

Tick box if Don't know/Can't recall/Declined to say

b) Shopping £.....
(including souvenirs, guidebooks, clothes, sweets, drinks, food, other purchases)

Tick box if Don't know/Can't recall/Declined to say

c) Entertainment £.....

(including admissions to attractions, theatre/cinema tickets, guided tours etc.)

Tick box if Don't know/Can't recall/Declined to say

d) Travel & transport in Bexhill £.....
(including fuel, fares, car parking charges)

Tick box if Don't know/Can't recall/Declined to say

24. How many people do these amounts cover?

People

25. 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 - WRITE IN NUMBERS)

	Age	Male	Female
A	0-15		
B	16-24		
C	25-34		
D	35-44		
E	45-54		
F	55-64		
G	65-74		
H	75+		

Declined -1

26. Are you part of an organised group or coach party?

Yes -1 No -2

27. Which of the following categories applies to the chief income earner in your household? (SHOWCARD 8)

Employed full-time (30+ hrs per week) -1 Go to Q28
Employed part-time (8-29 hrs per week) -2 Go to Q28
Self-employed -3 Go to Q28
Retired -4 Go to Q28
Full-time student living at home -5 Go to Q28
Full time student living away from home -6 Go to Q29
Unemployed -7 Go to Q29
Declined -8 Go to Q29

28. What is/was the principal occupation of the chief income earner in your household in terms of:

Industry/type of company

.....

Position/job title and grade/skill level where appropriate

.....

If 'manager', how many employees responsible for

.....

IF UK RESIDENT ASK:

29. What is your postcode?

.....

30. Finally, could I have your name and home telephone number? *I should emphasise that this will be treated in the strictest confidence and will only be used for the purpose of back-checking the questionnaire.*

Name of respondent: _____

Home Tel No: _____

THANK YOU FOR YOUR TIME

I declare that the respondent was unknown to me until the interview took place and that this questionnaire has been completed according to instructions:

Interviewer signature: