Eastbourne Visitor Research, 2012-13

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A very local visiting market – but a broad spread of ages

Extending Eastbourne's geographical reach

The survey was undertaken in the peak summer months – a time of the year when we might expect Eastbourne's visitor base in terms of geography to be quite diverse. However, the survey has highlighted what we see as one of Eastbourne's biggest challenges – how can the town extend its appeal and reach beyond the South East of England. Visitors are extremely local in profile - 50% were from Sussex and a further 10% from Kent and 8% from London. Only around 25% were from further afield in the UK and fewer than 10% were from overseas.

At other times of the year, we would expect the local market to be even more dominant, hence we feel that a key requirement for Eastbourne Borough Council is **to better understand interest the potential to visit from further afield.** Although we believe that the town's visitor economy could grow amongst the more local markets (both in terms of numbers and converting day trips into overnights – see below), real growth is most likely to come by raising awareness, appeal and interest in visits from further afield.

For this to happen of course, Eastbourne will need to develop and communicate a unique selling proposition (USP) to provide sufficient appeal to encourage visits from further afield. The whole issue of 'standing out from the crowd' and a USP are discussed later.

The Stage 2 GB-wide research amongst non-visitors helps to explain Eastbourne's positioning and what is required to put it in a better position to grow.

Not all about 'old people'!

A recurring perception that is often delivered about Eastbourne as a destination is that it is 'only for old people'. Obviously, its traditional popularity as a retirement town, coupled with its appeal to the coach tour market has helped to perpetuate this belief.

Interestingly however, the survey has demonstrated that although older visitors remain an important part of Eastbourne's visitor market, they are by no means as dominant as might have been anticipated. The largest proportion of visitors fall into the 'middle aged' group - four in ten are aged 35-54 years. The overall mix of age groups refutes the stereotype that Eastbourne is a 'destination for older people'. More than half of the visitors are with their partner or spouse while one third are with children. The average group size is three adults and one child.

We believe that the survey results provide a great deal of communications collateral which might be useful for the Council from a public relations perspective. Sure – older visitors are an important aspect of the visiting economy but they represent a minority (albeit a significantly sized one). Greater potential for growth is apparent amongst younger visitors and amongst families.

Meanwhile, this does highlight the challenge for Eastbourne to dispell the myth about 'only being for old people' whilst being careful not to alienate this important market segment itself. We believe it is all about communicating positive messages about the town and why it should appeal to attract the younger age group. Online channels and social media are the most likely to be successful.

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Satisfied and loyal visitors – but potential to grow the first-time and overnight markets – joint promotions?

Few first-time visitors but loyal, satisfied repeats

Again, given the timing of the research, from previous experience we might hjave expected that Eastbourne would have a relatively large proportion of first-time visitors (generally more likely to experience coastal destinations for the first time in the summer months than at other times of the year). However, only one in five were first time visitors (21%) – 79% were on a repeat visit.

In many ways, this balance reflects the fact that the visiting markets are very 'local' in nature – therefore, we would expect larger proportions to have visited previously. However it also confirms that Eastbourne is perhaps 'punching below its weight' when it comes to attracting new visitors – and this is likely to be the source of real growth.

The significant balance towards repeat visitors can be viewed in two ways – as a strength of the Eastbourne product – and as a weakness. It is a strength as it suggests that visitors who come are largely satisfied and are keen to return. Successful destinations are built on a sound foundation of loyal, repeat business. There are very high degrees of loyalty amongst repeat visitors although they are predominantly made up of day trippers – 68% - who return at least twice a year.

This can also be viewed as a relative weakness however – Eastbourne is clearly not attracting enough new visitors to provide the basis for longer term growth. New visitors are fairly clearly identified – they tend to be in the younger age groups and crucially, they tend to spend more.

Can we convert day visitors into overnights?

The largest proportion of Eastbourne's visitor markets are on a day trip from home – 44%. This reflects the fairly local visitor profile described already but we believe that this offers a real opportunity for Eastbourne. As existing visitors, they are clearly attracted to Eastbourne as a destination – hence one of the largest hurdles for destination promotion (willingness to visit) has already been overcome. Consequently, the real challenge is to identify means by which we can persuade these visitors to stay for a longer period – ideally overnight.

Given the wealth of accommodation stock, there is huge potential to target locally to provide appealing deals and offers to persuade those who may otherwise have only visited for the day to stay overnight. Of course, this will also have to tie in with other activities – eating out, things to do in the evening (theatre, cultural events) but there is undoubtedly real potential to develop Eastbourne's appeal locally as a 'place to visit for the weekend'.

Working with other destinations

The majority of visitors to Eastbourne spent all of their time in the town – rather than sharing their visit elsewhere. Clearly, this also suggests that the same is happening in other destinations in the area – each are being perceived as places to visit in their own right.

Whilst this has obvious appeal from a destination perspective (maximising the time spent locally), it is also limiting growth opportunities. Although Eastbourne is competing with many other destinations in the region for the 'visitor pound', there are undoubted opportunities to jointly promote Eastbourne with other areas.

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Provide a real motivation to visit

Amongst the existing Eastbourne visitors, two thirds spend all of their time in Eastbourne, and only for one third is Eastbourne part of a short break which includes time in other places. First time visitors were more likely than repeats to visit other areas on their trip – highlighting that a more regional offer might have greater appeal when we are targeting new visitors.

Perhaps joint promotions with inland areas such as the South Downs – Coast and Countryside? – could provide real potential for synergistic growth – 1+1 = 2½!

Need to provide a reason/motivation to visit

One of the key elements of the study was to understand the attraction of visiting Eastbourne. What aspect of the town persuaded them to visit. For the largest proportion, familiarity was key – 42% 'knew Eastbourne well'. Not surprising given the high proportions who were repeat visitors and who were local in terms of their residence.

However, this does not provide a reason to visit for non-visitors most of whom are either ignorant of what Eastbourne can offer or have prejudiced and incorrect perceptions based around the types of people that Eastbourne might appeal to. First time visitors were most likely to mention 'recommendation' by a friend or relative as a key trigger for visiting – illustrating the importance of word of mouth as a means of generating new visits and also the potential to use existing visitors as 'ambassadors' for Eastbourne (through communications and other campaigns).

Those staying overnight are also drawn by good deals on accommodation, while the youngest visitor groups are mainly attracted by particular attractions.

We feel that this illustrates that Eastbourne suffers from not having a particular unique selling point or particular reason to visit. Blackpool has its Tower and Brighton is famous for its pier. Whilst Eastbourne has many specific features and attractions, it is fair to say that none stand alone as specific motivators to take a trip. This does not need to mean that Eastbourne needs a new attraction or tourist development. Instead, it could be addressed by repackaging existing product strengths and communicating this more effectively . The marina development was largely unknown – even by existing visitors, yet those who did visit were fullsome in their praise. As we will discuss later, there is undoubted potential to develop the 'eating out' market – perhaps by the creation of a signature restaurant.

What about Eastbourne locals who are undertaking visitor activities in their own town? This is an important segment of Eastbourne's visitor economy – 28% of visitors are local residents. The main motivation for residents to spend their free time locally is to visit particular attractions or to have a day out. The most frequently mentioned attractions are Treasure Island, cafes, the beach, Holywell or the market. Again, are there opportunities to increase spend at these sites – or indeed other activities within the 'visitor economy' that could be offered to local residents at discounted rates to encourage greater participation and spend?

We also feel that local residents could play an important role in acting as promoters of the town to their friends and relatives who live elsewhere. We have seen examples in other destinations, for example, elsewhere, where the tourist authorities have provided local residents with postcards to send on to their friends advertising the appeal of a visit to the destination. These have often incorporated specific deals and offers.

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Maximise the 'communications effect' by timing campaigns appropriately and using the best channels

Time the communications for maximum effect

Much is discussed in travel literature and papers about the fact that the lead times to plan and book holidays are getting shorter and shorter. This is undoubtedly the case generally – and especially for specific types of holidays and amongst specific types of visitor. However, it would be wrong to apply this thinking across all destination types and markets.

In the case of Eastbourne for example, nearly half of overnight visitors planned their trip at least three months before they visited Eastbourne (45%) – indeed one in five planned the trip over six months before the visit (19%). First time visitors were more likely to plan some 3-6 months in advance (29%) while almost a quarter of returning visitors planned even earlier than this (22%).

This high degree of advance planning varies significantly by age – three in five of the younger visitors (aged under 35) planned at least 3 months in advance – possibly reflecting the fact that they were more likely to be first time visitors. 35-54 year olds were more likely to plan closer to the trip (56% within 2 months), whilst those aged 55+ were most likely to plan furthest in advance.

The relatively early planning carries forward into accommodation booking – much of which also happens relatively far in advance. The largest proportion – 6 in 10 – booking their accommodation over a month before the visit. Indeed one in three booked over 3 months before the trip. Returning visitors were the most likely to wait to the last minute and book less than two weeks prior to their visit.

Eastbourne's marketing communications plan needs to reflect these timelines – especially when promoting the town as a summer holiday destination. At other times of the year, planning and booking timelines will be considerably shorter.

Use the best available channels to reach them

One area which has changed completely over the last 10 years has been the channels used when planning and booking holidays. Traditionally, when asked about the main source of information prior to visiting a destination, holidaymakers have cited conversations and advice from friends and family. Amongst visitors to Eastbourne, this is still important – some 22% mentioned this. However, the importance of an online presence has never been clearer – the main source cited was an internet search engine (e.g. Google) – over a quarter of visitors used this source. Also however, the official Eastbourne visitor website was mentioned by one in every five. This is particularly encouraging as it suggests a relatively high penetration amongst existing visitors enabling the Council to have an influence on visitors at the trip planning stage. The website was particularly important amongst overnight visitors – one in three referred to it pre-trip – and amongst first time visitors (26%).

There has clearly been a decline in the importance of the more traditional front face of the Tourist Board – only 1 in 10 contacted the Eastbourne TIC in advance of the visit (we typically recorded 20%+ in the early 2000s in equivalent surveys elsewhere).

The above discussion suggests that TICs have a declining role. Perhaps this is true 'pre-trip', but they are still very popular sources of information for visitors when in the destination.

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Accommodation preference varies by market and rail travel offers opportunities – the communications should address this

Also in terms of activities during the trip, one area which has shown significant growth in all walks of life – but especially in travel – in recent years has been the use of social media. That said, it still remains a niche activity on holiday trips – only undertaken by serious bloggers and social media users.

In the case of Eastbourne there is relatively low use of social media – most visitors, particularly the older generations are not yet sharing their experience on social media sites. Those who do are most likely to update their Facebook status (one in every five visitors) or upload pictures on the internet (18%).

Despite this, we would argue that this still represents a clear opportunity for Eastbourne Borough Council to embrace social media and engage actively with these significant minorities of visitors. In addition, the penetration is only going to increase over the next few years therefore embracing the possibilities now, developing a significant online presence (Facebook page, Twitter address etc.), will place the Council in a very strong position to develop this presence going forward. It also provides a clear – and new – channel for communication with existing and potential visitors.

Maximising the opportunities - accommodation

From the visitor survey, accommodation usage in Eastbourne varies significantly by trip type and age. Hotels are more popular for those on a repeat visit, couples, and older visitors.

Bed and Breakfast establishments on the other hand have greater appeal amongst first time visitors – especially the under 35s. Visitors with children are more equally spread across a range of accommodation types – hotels, B&Bs, self-catering and friends & family.

This differentiation needs to be borne in mind in the communications materials created by the Council – particular types of accommodation will appeal to different types of visitor. Special deals and offers (e.g. for first time vis-a-vis returning visitors) could reflect this.

Maximising the opportunities - transport

In common with most British seaside resorts and visitor destinations, travelling by car is by far the most commonly used transport method for all types of visitors – four in five arrive in the town this way.

Consequently, several of the criticisms of the Eastbourne product reflect this – insufficient car parking, too expensive to park etc. Clearly, these are difficult issues to address for a Council which has limited parking availability and a need to gross income from this source.

However, Eastbourne's excellent rail links with London and further north and also with the south coast suggest that this provides an excellent opportunity to help address the parking problems and provide a means of attracting new visitors. Presently, 11% of visitors arrive by rail but its appeal amongst younger visitors is clear – one in five of the under 35s came by train.

Given the earlier points about Eastbourne attracting relatively small numbers of visitors from outside the south east, joint offers with the train companies could provide real opportuinities to open up the town to markets from further afield.

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Eastbourne's appeal based around core product areas – resulting in satisfied, loyal visitors – but still potential to improve

Maximising the opportunities – things to do

Amongst visitors, four key activities emerged as the main activities undertaken on the visit:

- Visiting the beach
- Short walks/strolls
- Going out for meals
- Shopping

Each of these activities has fairly universal appeal across different age groups, trip types and first time and repeat visitors. Therefore, in some ways, this represents the core of the Eastbourne product for most visitors to the town. Going out for a meal is more likely to be on the agenda for first time and overnight visitors. Some 87% of first timers eat out (50% overall) – again suggesting there is some undoubted potential for Eastbourne to 'up the ante' on eating out. Is there room for a signature restaurant or a more coordinated marketing of the eating out experience? This is explored later.

The seafront with the beach is the most visited part of Eastbourne, attracting seven in ten visitors. This is followed by the promenade, the town centre and the pier which are mentioned by every second visitor. These attractions are popular with everyone, but 1st time visitors & overnights were more likely to mention Beachy Head and Sovereign Harbour. Treasure Island was particularly popular among the family markets.

Again, marketing communications to these various groups needs to highlight these varying interests.

A satisfied and loyal visiting market, but......

When asked to comment on their levels of satisfaction with the visit, across the board, there are high levels of satisfaction with the visitor experience. Eastbourne also performs well in terms of likelihood to revisit. In terms or recommendation it slightly underperforms and shows no higher scores than the average UK destination in terms of competitive advantage. This latter area is a real challenge for all destinations – those which are particularly successful have generally been able to position themselves in a unique or 'best in class' position. For Eastbourne, the development of a more unique offer would undoubtedly help grow the town as a visitor destination.

There are variations in the overall satisfaction levels: returning visitors, those who stay overnight and those who are visiting with children value Eastbourne the most. First time visitors – understandably – have less of an established connection with the town and rate it slightly lower, as do day trippers where a visit requires less of an investment (emotional as well as monetary).

So, what is driving satisfaction? The friendly and efficient service in accommodation and the convenient routes into the town are the most satisfying aspects of visiting Eastbourne. Day trippers and repeat visitors are especially satisfied with the convenience of getting to Eastbourne (although it should be borne in mind that this doesn't tell us about those who currently do not visit because it's too difficult to get to!). Public transport availability, service and value for money all get fairly high ratings – although lower scores are provided by those visiting with children on these aspects.

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There are some issues around budget accommodation and the range of things to do and shopping facilities which must all be taken into account

In terms of accommodation in Eastbourne, friendly and efficient service received the highest ratings. Value for money and availability of good quality accommodation received fairly positive scores also. Lowest ratings were provided on the availability of low cost and budget accommodation.

This latter comment suggests a product gap and an opportunity for development – first time and family visitors were especially likely to criticise the availability of budget accommodation. Clearly, if this could be developed and packaged, this would provide a real opportunity for growth amongst this target market.

Encouragingly, the availability of information available locally about places to visit received high satisfaction scores – especially amongst older returning visitors. This suggests they were more likely to use these information sources and perhaps visit the TIC than younger, first time visitors. The opportunities to attend local events also received high satisfaction ratings – again, especially among older repeats, but also among the day trip market.

Value for money overall, the availability of shopping facilities, and the variety of activities and things to do received fairly positive ratings, albeit not to the same extent as the aspects described above. This does suggest some shortcomings in these areas. Again, the absence of a signature attraction or reason to visit perhaps contributes to some extent in the latter case.

Availability of sporting facilities was more of a niche interest – a third described it as not applicable and a further quarter had no real opinion.

The highlights of visiting Eastbourne over the period were good weather, the beach and the sea. Being clean and friendly also appear among the strengths. In terms of attractions, Beachy Head, Treasure Island the Pier and Promenade are highlighted. All of these need to be highlighted in the town's marketing communications.

All of the above reflects the views of current visitors – generally high levels of satsifaction but some key product areas which could be developed (budget accommodation, eating out, shopping and the range of things to do). The non-visitors' research should help to establish the extent to which these areas might also emerge amongst potential visitors. These product improvements are discussed further overleaf.

It is also important that any developments or communication changes do not alienate the needs of existing visitors: despite some of the negatives mentioned above, they are, after all, very satisfied and loyal. Similarly, let's not forget the needs of local residents who contribute to the visitor economy – any developments and changes should incorporate their views and opinions as well.

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Visit Eastbourne

Product improvements – wet weather facilities, more cultural activities, accommodation deals, water park, West End Shows and better restaurants and shops

Product Improvements

Across the visitors surveyed, three primary areas for improvement to the Eastbourne tourism product were identified, along with a further four secondary areas for improvement. Almost a quarter wanted more wet weather activities – and this was especially important for overnight visitors and those visiting with children as well as first time and younger visitors. This is a key development requirement for these high value groups which have some growth potential for the town.

One in five were looking for more cultural facilities – another priority given that this was again particularly likely to be mentioned by younger, first time visitors. Deals on accommodation were also a priority for first time visitors (their primary concern) and the 35-54 year old segment.

Secondary product improvements were mentioned by 13-16% of visitors. A water park was especially popular amongst the family market – one in three supporting this option whilst touring West End shows were more likely to be popular amongst residents and older (55+) visitors. Better restaurants had fairly universall support but were again especially popular amongst residents (28%) and the under 35s. Better shopping facilities were popular amongst residents and younger visitors.

Clearly, priorities would have to be placed on all of the above suggestions – and care not to alienate existing visitors happy with the current offer. The needs of first time visitors might best indicate the types of development which would lead to most growth from new visitors – and the top 4 suggestions mentioned above were of greatest interest to this group – wet weather facilities, more cultural activities, accommodation deals and a water park. For younger visitors, a water park, better restaurants and wet weather facilities held greatest appeal.

Delivering on the hygienics

One key priority for the Council is to try to get the 'hygienics' right – deliver on the basics which cvan make or break a visit. In this case, there were a number of particular concerns around the range and availability of car parking facilities in the town. Some mentioned how expensive and unreasonable parking was, though it should also be noted that some were satisfied with the free car parks. Given that the vast majority of visitors travelled to Eastbourne with their own car, the importance of parking facilities is understandable. Better communications around the range of options on offer (reflecting the fact that some visitors were pleasantly surprised by the free parking available whilst others were critical of the cost to park!), would be beneficial.

Other 'hygienics' which need to be addressed relate to the availability and standard of public toilets and (to appeal to young families) there is a need to improve and better communicate the changing / breast feeding units available as well.

Becoming more competitive

Eastbourne's competition mainly comprises Brighton (mentioned by two thirds as another place they would consider visiting). Two other destinations were mentioned by two in five – the Isle of Wight and Hastings whilst a third mentioned Bournemouth. Portsmouth was the only other destination mentioned by more than a fifth of visitors as an alternative to Eastbourne.

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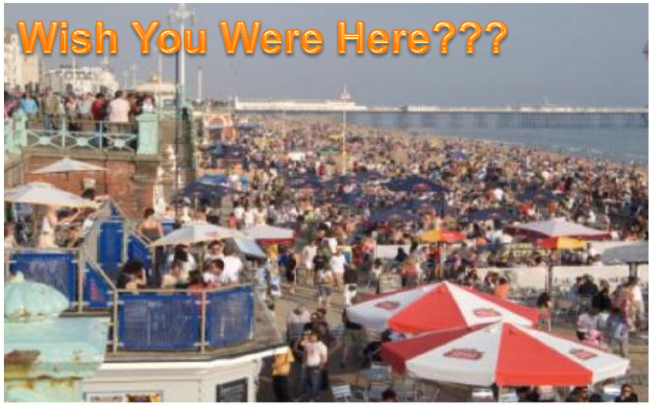
Eastbourne needs to develop its own positioning – a very different proposition from Brighton which will appeal to a slightly different market.

Brighton is considered generally to have better shops, restaurants and places for a night out. Being able to do more things in general and more opportunities for cultural activities also appear the be the strengths of Brighton. On-location interviews discovered that Eastbourne has its own appeal with its seafront and charming atmosphere.

In some ways we would argue that the strengths of Eastbourne are actually the weaknesses of Brighton – and an opportunity exists to build upon this. For example, emphasis in advertising communications of Eastbourne's convenient transport links, the availability of car parks, the relaxing and crucially – the less commercialised and more relaxed atmosphere would enable Eastbourne to clearly position itself as a very different – but appealing alternative to Brighton. Distinguishing itself in this way, rather than trying to compete head on with Brighton on its product territory is likely to be more advantageous for Eastbourne.

In general, shopping facilities and more activities come up most often in terms of what competitors can offer over Eastbourne. Wet weather facilities, more cultural activities and deals on accommodation are the top three aspects visitors are missing in Eastbourne. Shopping and restaurant vouchers could be offered together with deals on accommodations, as a full package for the weekend. This could attract new visitors and convert day visitors into overnights.



Brighton has.....

Better shopping facilities *33%*

More things to do *28%*

More cultural activities *25%*

Better restaurants *22%*

Better places for a night out *22%*

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Among non-visitors…….

Insight

The South East as a whole performs relatively poorly in attracting visitors. Within this, visitor levels to Eastbourne are broadly in line with expectations, although at 14% of South East visitors, there is clearly room for improvement

Future Eastbourne consideration increases significantly amongst past visitors

Eastbourne receives a low proportion of visitors aged 16-24 compared to the South East as a whole. This is linked to perceptions of the town as "unexciting" and "not for people like me"

A further, but perhaps less accessible, target are visitors from the North. While the South East receives a low proportion of these relative to the country as a whole, Eastbourne performs even more poorly amongst them, hinting that there are wider issues than simply proximity

Recommendation

As the overall level of visitation to the South East is low, Eastbourne's share within this must become the focus. Representing Eastbourne as a prime destination compared to South East rivals will be vital

Eastbourne's offer is clearly satisfactory: focus should therefore be on getting people to visit the town in the first place

Highlighting what Eastbourne has to offer to younger people, alongside its variety of attractions will help to counter existing views of the town, and linking these to any existing events, venues and offers will help to convert those newly aware of what Eastbourne has to offer to visitors

A campaign to raise awareness of Eastbourne and its attractions is likely to have a significant impact on visitor levels. Linked to this should be provision of practical information, such as travel times and routes. Ensuring that Eastbourne's online profile is up to date and visible amongst all regions and ages is also a cost-effective way of spreading information

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