Bognor Regis Resident and Visitor Survey 2018

For Arun District Council

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RESEARCH

1. Introduction

In 2014, Arun District Council (Arun DC) was awarded funding worth £1.65 million to deliver an enhanced public realm scheme across Bognor Regis town centre. The funding was predicated on the improvement of the public realm creating new jobs, which would be brought about by an increase in spending in the town centre. This would be achieved in two ways; firstly by increasing visitor spend in the town centre, and secondly by encouraging residents of Bognor Regis and the wider area to do more of their shopping in the town.

In order to measure the impact of the enhancement to the public realm and assess whether this led to the creation of jobs, ADC commissioned Qa Research (Qa) to conduct two studies that would act as a baseline measures of visitor and resident spend and the staffing levels and trading confidence levels of businesses. These studies were conducted in 2014, prior to the implementation of the public realm improvements.

In order to measure the impact of the improved public realm Arun DC has commissioned Qa Research (Qa) to repeat the 2014 research in Bognor Regis in 2018 following the completion of the public realm improvements.

This data has been compared to data collected in 2014 before the public realm improvements were implemented. This 'baseline' data has been compared to the most recent data in order to produce a 'before and after' comparison to assess the impact of the public realm on the visiting and shopping habits of residents and visitors in the town centre.

This report presents the results of the research with residents of Bognor Regis and visitors. The results of the research with businesses are described in a separate report.

2. Aims and objectives

The principal objectives of the research with residents and visitors were to;

- Determine the frequency of trips to Bognor Regis town centre for shopping or leisure
- Measure the average length of those trips
- Explore resident and visitor spend in the town centre.
- Explore the difference in results between the pre-improvement (2014) and post-improvement (2018) surveys
- Determine the extent to which any change can be attributed to the public realm improvements.

3. Methodology

The research was conducted using a sample survey. Fieldwork was carried out by face-to-face interviews with the public using a survey designed collaboratively by Qa and ADC. To ensure a broad mix of residents were interviewed, minimum quotas were set on age, gender, and whether the respondent was a resident or visitor. Interviews were carried out in the areas where the public realm improvements had taken place.

Interviewing was carried out between 18th September and 4th October 2018 in varied locations across the town centre. Interviews were conducted with members of the public, who were stopped on street and asked if the wanted to take part in the research. The quota system ensured

that a mix of different people took part, especially residents and visitors, in order to ensure a wide range of views were captured.

In total, 258 respondents completed the survey. Following the return of the completed surveys to Qa, they were quality checked for accuracy and manually inputted into an electronic database. The results were then collated and analysed ahead of production of the report.

When reading this report, it should be noted that due to the small sample size (258) the results are not necessarily statically representative of the resident and visitor population of Bognor Regis. However, the results do provide a strong indication of the views for residents and visitors to the area.

External factors affecting longitudinal comparisons

Throughout this report, findings from this survey (2018) are compared with the baseline survey (2014). When interpreting these comparisons, especially those relating to consumer shopping habits and spend, it is important to consider the difference in time between these two surveys, the difference in the sample (especially in terms of residents vs. visitors), and the impact that external variables could have on the data.

A key change has been the move away from shopping in person towards internet shopping which is particularly true for non-food items. Data shows that in 2014 16% of non-food spend was on the internet, and in 2017 that has risen sharply to 25% of spend[1]. This drop in non-food spend is reflected in the data collected in 2018 which shows a fall in spend on both household goods and clothing sales.

There has also been considerable economic, political, and social change in the UK (and indeed globally), since 2014, and these can all have an impact on results. The continued long term stagnation in wages (indeed, decline in real wages when inflation adjusted) and the squeezing of disposable incomes have reduced consumer confidence and spending growth[2], creating a toxic environment for the retail sector. Data reported by Visa in 2017 highlighted that British households had cut back their spending for the first time in four years (i.e. since prior to the 2014 survey) and that this included spending on "*clothing, household goods, food and transport*"[3].

It is against this backdrop that the findings of this research should be considered, especially when comparing the results from 2014 to those from 2018

[1] Financial Times; Online retail sales continue to soar (11 Jan 2018)

[2] KPMG/Ipsos Mori Retail Think Tank; Retail Think Tank predicts worst run of retail health for five years (2017)

[3] The Guardian; UK household spending falls for first time since 2013 (12 June 2017)

4. Key findings

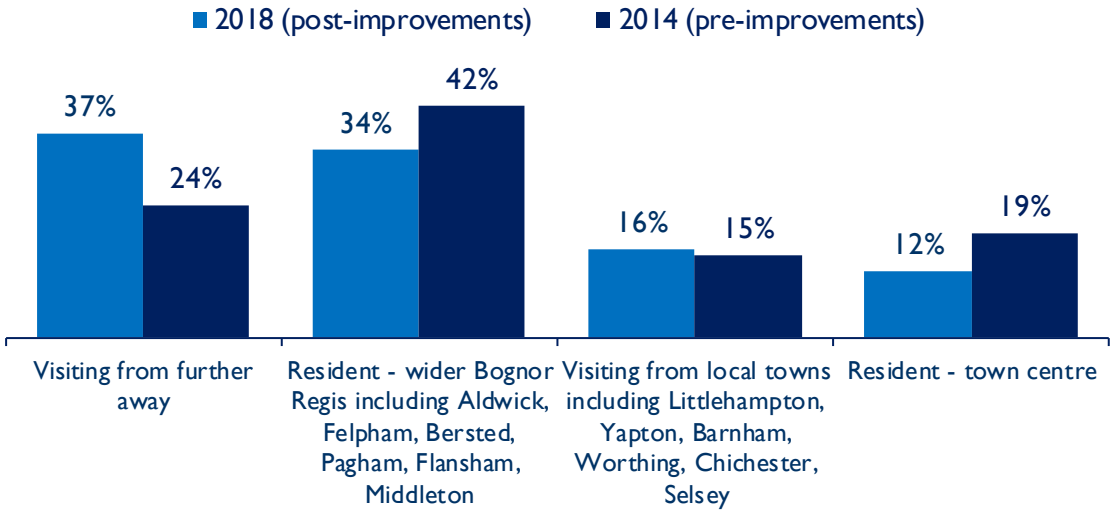
This section of the report details the key findings of the residents and visitors research.

4.1 Profile of respondents

This section describes the profile of those who took part in the survey, and also highlights any differences between the pre-improvement (2014) and post-improvement (2018) samples.

Respondents were first asked if they were a local resident of Bognor Regis or if they were visiting. For clarity, respondents were shown the available options on a printed card (a 'showcard') to prompt them. Results are shown in the chart below;

Q1. Are you a local resident of Bognor Regis or are you visiting?



Source: Qa Research 2018 **Base:** 2018: 258, 2014: 258 (all respondents)

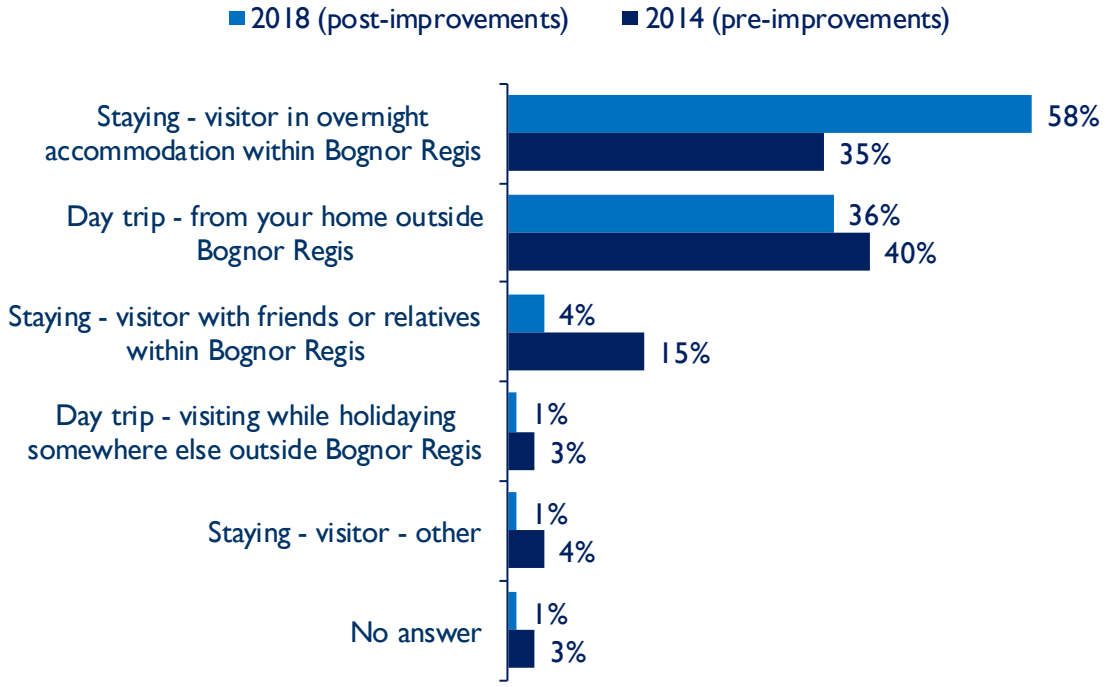
The 2018 sample was split roughly in two with half (53%) being visitors to Bognor Regis and the other half (47%) being residents of the town. Visitors were more likely to come have come further afield than from local towns; around one-in-six (16%) were '*visiting from local towns including Littlehampton, Yapton, Barnham, Worthing, Chichester, and Selsey*' but more than twice as many (37%) were '*visiting from further away*'. Amongst residents, a greater proportion (34%) came to the town centre from '*wider Bognor Regis including Aldwick, Felpham, Bersted, Pagham, Flansham, and Middleton*' than were living in Bognor Regis '*town centre*' (12%).

The proportion of visitors in the sample has increased by a statistically significant degree since the 2014 survey (from 40% to 53% in 2018). This increase has been driven by an increase in the proportion of visitors coming from '*further away*' (from 24% to 37%) and there has been no significant change in the portion visiting from '*local towns*'. Correspondingly, given the increase in the proportion of visitors, the proportion of residents in the sample has decreased.

It should be noted that during the 2018 fieldwork period, Prince Harry and Meghan Duchess of Sussex (née Markle), visited Bognor Regis and this considerable public interest in the town. Although the Royals were visiting a university campus outside the town centre and area where interviewing took place, this may have nonetheless led to an increase in visitors to Bognor Regis, which could have correspondingly impacted on the proportion of visitors recorded in the survey. This cannot be conclusively said from the data, and there may be other factors that influenced the increase in the proportion of visitors, but should still be considered when interpreting the results.

Respondents who were '*visitors*' were then asked what sort of visit they were on. Answers were chosen from a pre-coded list shown to the respondent on a showcard, and are outlined below;

Q2. As a visitor to Bognor Regis, are you on a...



Source: Qa Research 2018 **Base:** 2018: 137, 2014: 102 (visitors to Bognor Regis)

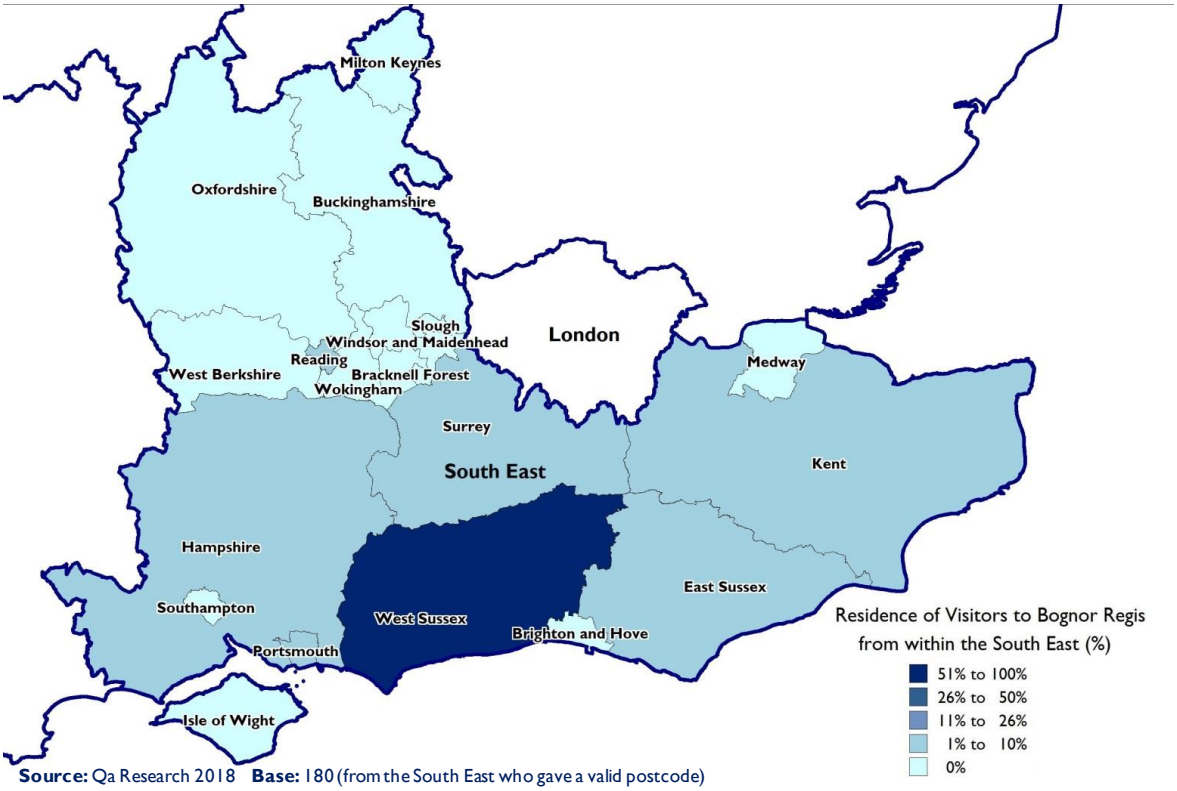
In total, the majority (63%) of visitors to the town were staying over overnight, with the bulk of these specifically '*staying in overnight accommodation within Bognor Regis*' (58%). This latter proportion, of those staying in overnight accommodation, has increased significantly from the 35% recorded in the 2014 survey[4]; this tallies with data recorded by Tourism South East[5]. In contrast, there has been a significant decrease in those '*staying with friends or relatives*' (from 15% in 2014 to 4% in 2018). The overall proportion of all staying visitors to the town has not increased significantly however (53% in 2014, 63% in 2018), and visitors remain broadly split between those staying and those on a day trip.

Day trippers made up 36% of visitors in 2018, and although this appears to be a decline from the 43% recorded in 2014 this was not a statistically significant difference. Day trippers were most likely to be visiting '*from their home outside Bognor Regis*' (36%), with a negligible proportion (1%) '*visiting whilst holiday somewhere else outside Bognor Regis*' (1%). This profile of day visitors is largely the same as it was in 2014.

Towards the end of the survey, respondents were asked to give their home postcode so that their locations might be mapped. This would illustrate where those coming to Bognor Regis were coming from. Two thirds (72%) of all those surveyed came from the South East, and the distribution is shown overleaf. The darker the colour the greater the proportion of visitors from that area, and the numbers in brackets are the number of counties which fall into that category.

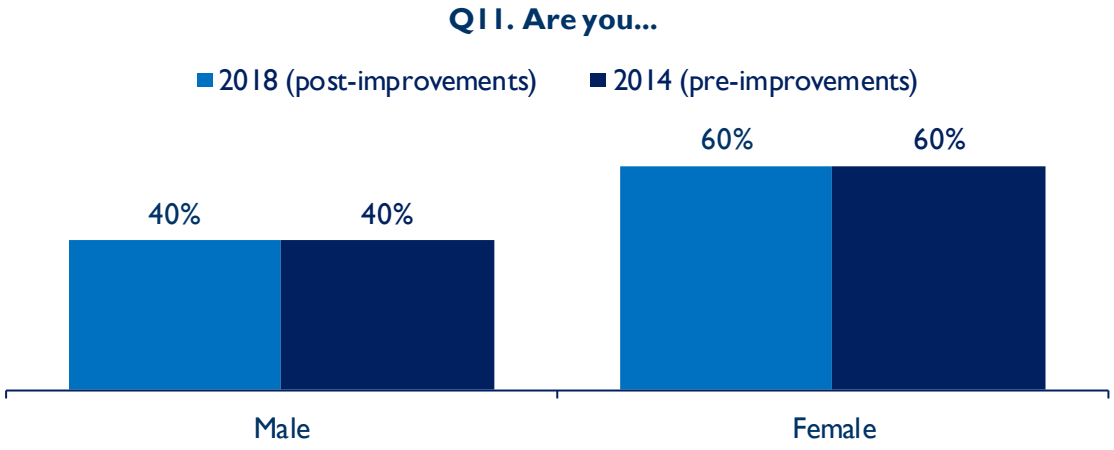
[4] This corresponds to data collected by Tourism South East, which showed a similar increase.

[5] Detail from Arun District Council



Source: Qa Research 2018 **Base:** 180 (from the South East who gave a valid postcode)

Demographic details of respondents were also recorded in order to understand the types of people that responded to the survey and also to ensure a broad mix of these were included. The breakdown of the sample by gender is shown below;

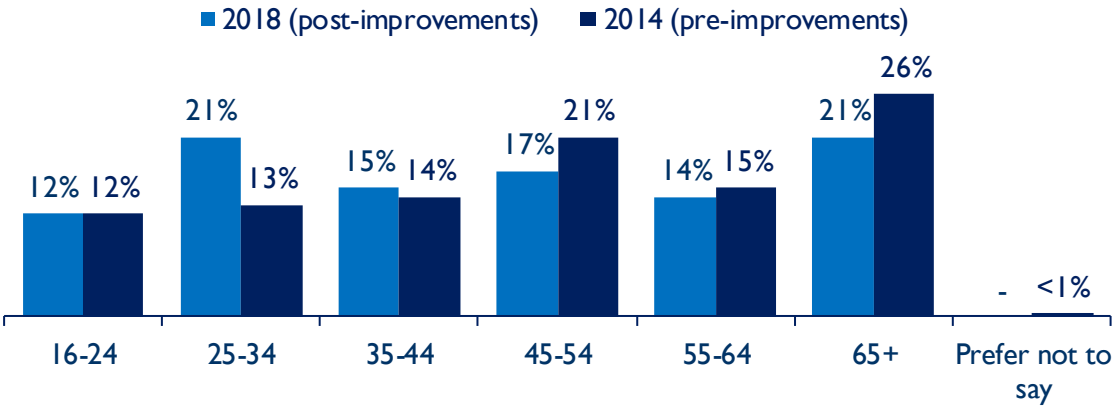


Source: Qa Research 2018 **Base:** 2014: 258, 2018: 258 (all respondents)

Three fifths (60%) of the sample were female compared to two fifths (40%) that where male. The gender split of the sample in 2018 was exactly the same as in 2014.

Age was also recorded, and the distribution of ages in the sample is shown in the chart below;

Q12. Which of the following age groups do you belong to?



Source: Qa Research 2018 **Base:** 2018: 258, 2014: 258 (all respondents)

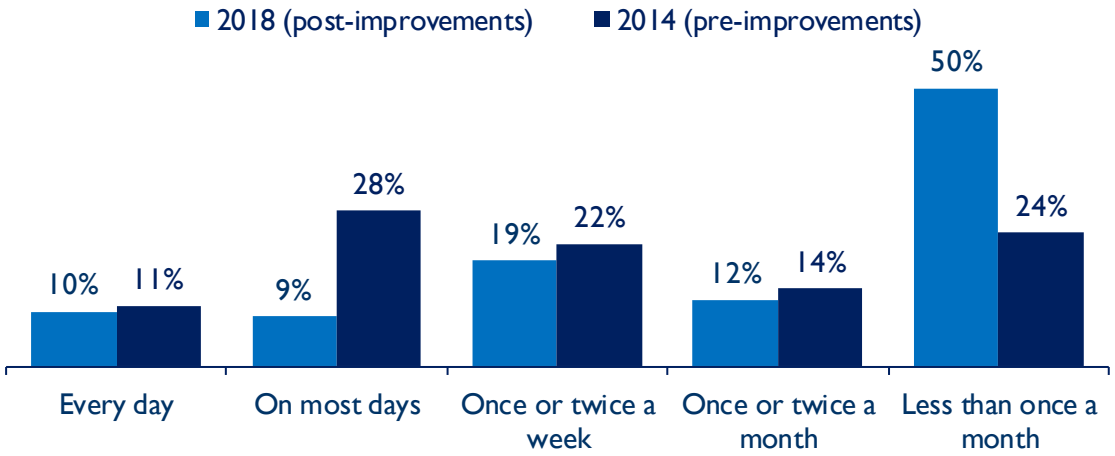
The profile of the sample by age in 2018 was fairly similar in that recorded in 2014. There was a fairly even distribution of ages in the 2018 sample, with only those aged over 65 and between 45-54 having notably more respondents than other age groups.

The demographic similarity of the sample means that any differences in responses are less likely to be driven by these factors. However, the split by residents and visitors is more likely to have an effect, and this is highlighted at relevant points in the report.

4.2 Frequency of visits to Bognor Regis town centre

All respondents were asked how often they usually visited Bognor Regis town centre for shopping or for leisure. They were instructed to pick from a series of options that were read out by the interviewer, and the results are shown in the chart below;

Q3a. How often do you usually/ would you plan to visit Bognor Regis Town Centre for shopping or for leisure?



Source: Qa Research 2018 **Base:** 2018: 258, 2014: 258 (all respondents)

Half (50%) of respondents in the sample visited the town centre '*less than once a month*', and this was twice the proportion who did so in 2014 (24%, a statistically significant difference). Overall, in 2018 far less respondents visited '*at least most days*' (Net: '*every day*' and '*on most days*') than visited '*less often than most days*' (Net: '*once or twice a week*', '*once or twice a month*' and '*less than once a month*') (19% vs. 81%).

Compared to the 2014 sample, the proportion of those who visited '*Net: at least most days*' (40% in 2014) was lower in 2018 (18%); correspondingly, the proportion who visited '*Net less often than most days*' has increased since 2014 (from 60% to 81%).

The decline in the frequency of visits amongst the sample overall is likely driven by the greater proportion of visitors in the sample in 2018 (53% were visitors) compared to 2014 (40% in 2014). This is because residents live closer to the town centre and thus can visit more often, as opposed to visitors who live further away and thus would make trips to Bognor Regis with much less frequency – therefore the average frequency of visits per person in the sample has decreased due to the proportion of visitors in the sample increasing. This makes direct comparison between the samples more difficult – however if the public realm improvements have indeed caused an increase in visitor numbers to the town then the average frequency of visits per person in the town centre would be expected to decline, even if the actual volume of people (residents and visitors) may have increased.

The table shows the frequency of visiting the town centre split residents and visitors, in both 2014 and 2018.

	Frequency of visiting the town centre			
	2014 (pre-improvements)		*2018 (post-improvements)*	
	Residents	*Visitors*	*Residents*	*Visitors*
Net: At least most days	58%	11%	36%	3%
Once or twice a week	27%	16%	33%	7%
Once or twice a month	14%	14%	17%	8%
Less than once a month	1%	60%	14%	82%
Base	***156***	***102***	***121***	***137***

Amongst residents in the sample, the frequency of visiting appears to have declined slightly since 2014 – although it should be stressed once again that these findings cannot be generalised to the entering visiting population of the town centre. In the 2014 sample 58% of residents said they visited the town centre '*Net: at least most days*' and this has decreased significantly to 36% in 2018. However, this has been driven by an increase in the proportion of residents visiting '*less than once a month*' (from 1% in 2014 to 14% in 2018) – the proportion of residents visiting '*once or twice a week*' or '*once or twice a month*' has not changed significantly since 2014.

The frequency of visiting also appears to have declined slightly amongst visitors to Bognor Regis, with the proportion who visited the town centre '*Net: at least most days*' falling from 11% in 2014 to 3% in 2018. The proportion of visitors visiting '*once or twice a week*' has also declined by a small but statistically significant degree, from 16% to 7%. Instead, visitors in 2018 were more likely to visit '*less than once a month*' (82%) than they were in 2014 (60%).

This apparent decline in frequency of visitation amongst visitors in the sample is very likely to be partially driven by increase in the proportion who were '*visiting from further away*' (37% in 2018 vs. 24% in 2014); whilst the proportion '*visiting from local towns*' did not change (16% in 2018, 15% in 2014), it did decline *relative* to the proportion of '*visitors from further away*'. Assuming that those who live further away have less opportunity to visit Bognor Regis due to the distance, this would explain the greater proportion who were only visiting '*less than once a month*'.

Due to the small base size of the sample and in part due to the variability between the 2014 and 2018 samples, drawing comparisons between the results of the two surveys is difficult. On the one hand, the results suggest that both visitors to the town and residents of Bognor Regis may visit less frequently in 2018 than they did in 2014. Conversely these differences are likely driven to some extent by differences between the two samples, in particular the greater proportion of visitors who come from further away than local towns. It is also worth noting that the frequency of visiting, especially for visitors, does not necessarily impact their dwell time or spend in the town centre.

Respondents who visited '*less often than most days*' were then asked what, if anything, would make them want to visit the town centre more often. Answers, which were recorded verbatim and coded into thematic categories in analysis, are shown below – only the results from 2018 are shown.

Q3b. What attractions would make you want to come here more often?	Count	Percentage
Visiting Butlins	35	17%
Better quality of shops	28	13%
Specific type of shop requested	22	10%
Better range of shops	13	6%
More to do on the sea front	13	6%
More organised events or entertainment	13	6%
A Primark store	10	5%
If there were fewer homeless people	10	5%
Fewer charity shops	10	5%
If it was cleaner	7	3%
An ice rink	7	3%
An improved pier	7	3%
More to do for children and young people	7	3%
Bigger or better market	6	3%
Better quality of places to eat and drink	5	2%
Specific named shop requested	5	2%
Better nightlife	5	2%
Better range of places to eat and drink	4	2%
Other	9	4%
Nothing / no comment	58	28%
	210	

Overall, a wide and disparate array of answers were given, and this suggests that there was no one overarching thing missing from the town centre offer. Indeed, one quarter (28%) of respondents had no suggestions to make. Instead, it was a variety of things specific to individuals that people wanted to see.

The only clear theme to emerge from this question was the preference for an improved retail offer in Bognor Regis, although this was not a majority viewpoint. There was a desire for a '*better quality of shops*' (13%), '*better range of shops*' (6%), '*fewer charity shops*' (5%), and requests for '*specific types of shop*' (10%). A '*Primark*' store was specifically mentioned by a small proportion of respondents (5%). Residents were more likely than visitors to say they wanted a '*better quality of shops*'. Overall then, a more vibrant retail offer was something a minority of respondents did want.

The most common response overall was '*visiting Butlins',* with around one-in-six (17%) giving this answer. Unsurprisingly, this response was given exclusively by visitors to Bognor Regis, with 26% doing so – clearly, this resort continues to be a key attraction for the town.

4.3 Shopping and leisure destinations aside from Bognor Regis

Respondents were then asked where else they went for shopping and leisure. Respondents could pick as many options as applied from a showcard and also name other destinations which were recorded and later coded into geographic categories. Results are shown in the table below;

Q4. Apart from Bognor Regis, where else do you go for shopping / leisure at least once a month?	2014	2018
Chichester	58%	50%
Portsmouth	18%	29%
Worthing	11%	28%
Brighton	9%	21%
Southampton	4%	17%
Littlehampton	10%	14%
Gunwharf Quays	8%	14%
London	9%	13%
Arundel	2%	3%
Selsey	-	1%
Shoreham-by-Sea	<1%	<1%
Net - Other	16%	28%
None of the above	10%	3%
Base: All respondents	**258**	**258**

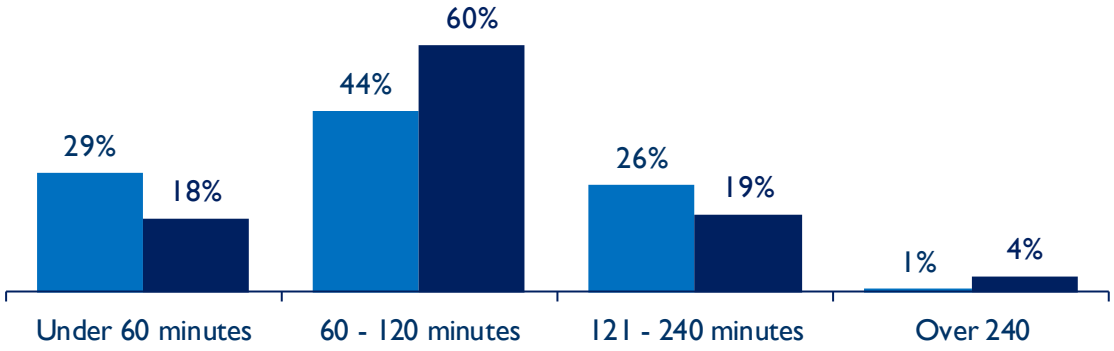
The most often mentioned single destination was '*Chichester*', which was visited at least once a month by half (50%) of respondents in 2018. '*Chichester*' was also the most common destination in 2014 (50%). The second most common locations were '*Portsmouth'* (29%) and '*Worthing*' (28%), and these settlements were also the second and third most common in 2014. A significantly greater proportion of respondents said they visited '*Brighton*' and '*Southampton*' in 2018 compared to 2014, and across all locations respondents appeared to visit more individual destinations than they did at the previous survey.

Given the high proportion of the sample that came from the South East (72%), it is unsurprising that these South East towns and cities are heavily represented.

4.4 Duration of visits to Bognor Regis town centre

Respondents were then asked a series of questions designed to measure the amount of time they spent in the town centre. The first of these was how long they intended to spend in the town centre on the day of the interview. Answers were recorded verbatim as whole minutes and sorted into categories during analysis;

Q5a. How long do you intend to spend in the Town Centre today? Minutes



Mean average length of visit:
2018: 94 minutes, **2014**: 115 minutes

Source: Qa Research 2018 **Base:** 2018: 258, 2014: 257 (all respondents)

Just under half (44%) of visits to the town centre lasted between '*60 and 120* minutes', and the mean average length of visit fell roughly in the middle of this time span at 94 minutes. Trips to the centre essentially always lasted less than four hours; only 1% said their trip lasted longer than this.

Compared to the 2014 survey, the mean average length of visit amongst the sample of people who took part in the survey has seen a statistically significant decline, falling from 115 minutes in 2014 to 94 minutes in 2018. This has been driven primarily by a significant decline in the proportion of respondents who spent '*60-120 minutes*' in the town centre (from 60% in 2014 to 44% in 2018) and a corresponding significant increase in the proportion who spent '*under 60 minutes*' there (from 18% to 29% in 2018).

It must be stressed that due to these results not being statistically robust this decline cannot be generalised to the entire visiting population of the town centre.

Results for residents and visitors are shown below and both have experienced a statistically significant decline in average length of visit. Therefore, the decline in length of visit overall wasn't driven by either of these groups or variation in the resident / visitor profile of the sample, but rather is an overarching decline amongst those sampled. Again, it should be stressed that these findings cannot be generalised to all residents and visitors who come to the town centre.

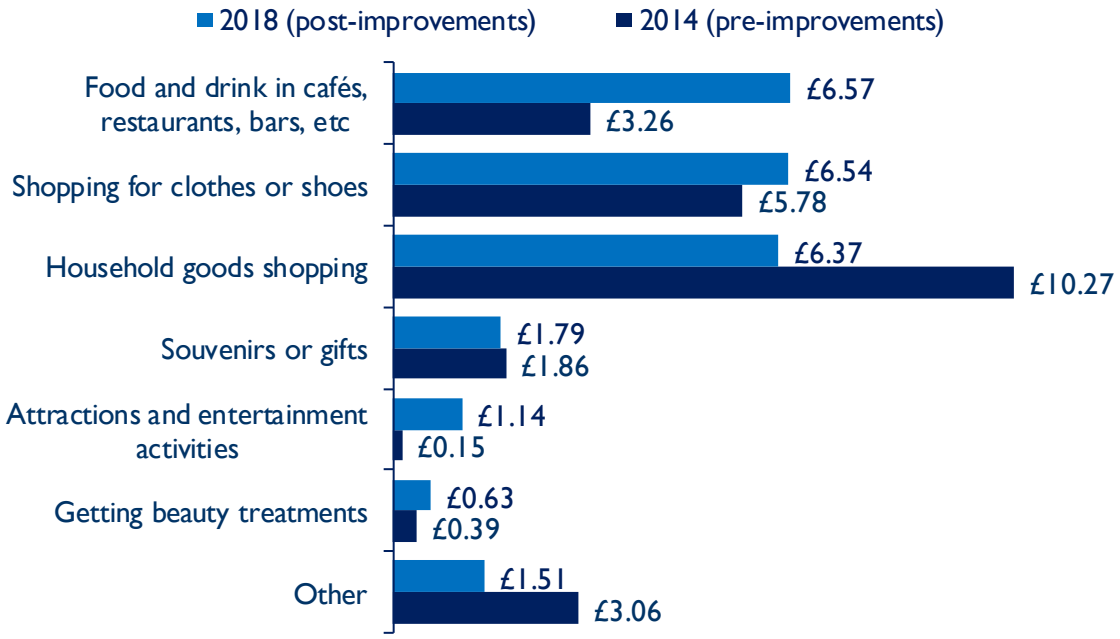
	2014 (pre-improvements)		*2018 (post-improvements)*	
	Residents	*Visitors*	*Residents*	*Visitors*
Mean average length of visit (mins)	92	151	64	120
Base	***156***	***102***	***121***	***137***

4.5 Spending in Bognor Regis town centre

Following on from the questions about the duration of the respondents' visit to the town centre, a series of questions were asked to gauge their levels of spending in the town centre. Respondents were asked how much in total their party had spent, or expected to spend, in the town centre on the day of the interview for a variety of different areas. The values were recorded verbatim and the mean average spend for each area is shown in the chart below

Please note that the mean average includes zero figures and is divided by the number of individuals (adults and children) in the respondents' party (Q10). Thus, the figures represent an average spend per person in the town centre.

Q7. How much in total have your party spent on today's trip in the town centre on the following?
- mean average spend per person per party -



Source: Qa Research 2018 **Base:** 2018: 258, 2014: 258 (all respondents)

The results suggest that more money is spent in on food and drink in the town centre in 2018 than was in 2014. The highest average spend was on '*food and drink in cafés, restaurants, bars, etc.*', at a mean average of £6.57 per person. This has more than doubled since the 2014 survey, a statistically significant increase. The food and drink offer has improved in quality and increased in the town since 2014, and therefore such an increase might be expected. In addition, as highlighted in the table overleaf the spend on food and drink amongst both residents and visitors had increased; this was especially true of visitors who spent an average of £5.01 per person on food in 2014 and an average of £8.50 per person in 2018, a statistically significant increase.

In contrast, spend on '*household goods shopping*' in the town centre has decreased since the 2014 survey, falling from a mean average of £10.27 in 2014 to an average of £6.37 in 2018 (a statistically significant decrease). Whilst some degree of decline in the spend here would be expected given that a greater proportion of visitors to Bognor Regis were present in the sample in 2018, this decline was in fact driven by a decline in average resident spend more so than visitor spend. This is discussed in more detail in below the table overleaf.

The mean average spend on '*getting beauty treatments*' (£0.63) and '*attractions and entertainment activities*' (£1.14) was once again the lowest area of spend, although despite remaining relatively low spending on '*attractions*' this had increased since 2014 (although this fell just short of being a statistically significant increase); the latter is likely driven by the greater proportion of visitors in the 2018 data,

Results split out between residents and visitors, for both the 2014 and 2018 surveys, are shown in the table below.

	Mean average spend in the town centre			
	2014 (pre-improvements)		***2018 (post-improvements)***	
	Residents	*Visitors*	*Residents*	*Visitors*
Food and drink in cafes, restaurants, bars, etc	£1.82	£5.01	£2.86	£8.50
Shopping for clothes or shoes	£4.62	£7.12	£5.00	£7.33
Household goods shopping	£13.00	£6.06	£8.09	£5.48
Souvenirs or gifts	£1.38	£2.44	£1.31	£2.04
Attractions and entertainment activities	£0.02	£0.33	£0.00	£1.74
Getting beauty treatments	£0.23	£0.63	£1.07	£0.41
Other	£4.54	£0.80	£2.24	£1.13
Base	***156***	***102***	***121***	***137***

The mean average spend on '*food and drink*' has significantly increased for both residents and visitors since the 2014 survey. Indeed, average spend on this amongst residents has increased by 57% to £2.86 and amongst visitors by 70% to £8.50. As was the case in 2014, in 2018 visitors spend significantly more on '*food and drink*' than residents did. The significant increase seen for the average '*food and drink*' spend overall was therefore driven by both residents and visitors spending more on sustenance in the town centre, although visitors did contribute to a greater proportion of this increase.

As noted on the previous page, the decline in mean average spend on '*household goods shopping*' has, counterintuitively, been driven by a significant decline in resident spend on household goods (at least amongst this sample). Visitor spend has remained essentially the same as it was at the previous survey (£5.48 in 2018, compared to £6.06) with no statistically significant change. In contrast resident spend on household goods declined by 38%, from £13.00 in 2014 to £8.09 in 2018. This reduction is in line with national trends – see Page 4.

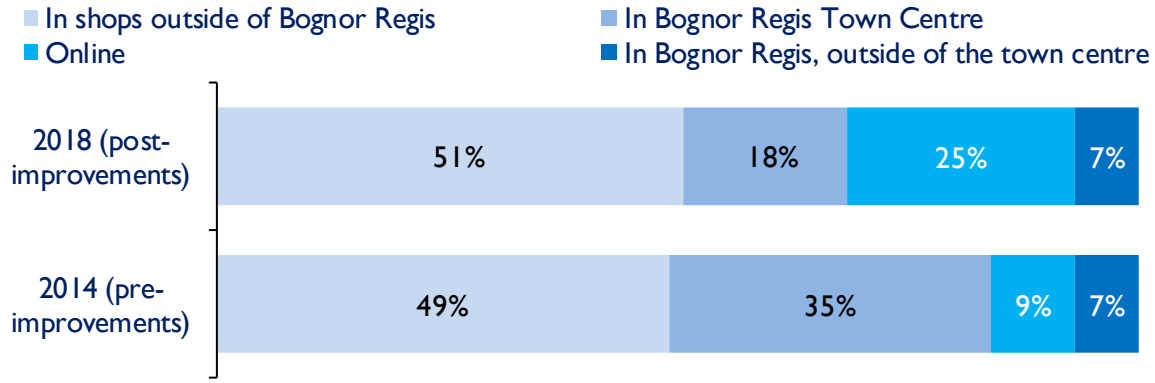
There was no statistically significant variation between any of the other mean average spend figures.

Overall, the results for average spend in the town centre present a mixed picture. Certainly within the 2014 and 2018 samples spend on food and drink in the town has increased, however there has been a corresponding decline in spend on household goods and no notable change in spend on other items. Spend, especially for residents, is likely to be highly variable and the small base size of this survey means the results should not be considered representative of the entire visiting population of the town centre.

Respondents were then asked what proportion of their money they tended to spend in Bognor Regis town centre and what proportion elsewhere. Respondents were asked to give figures that added up to 100%, and the mean average of the percentage of spend is shown below;

Q9a. Thinking about your shopping and leisure trips overall, what percentage of your money do you tend to spend...

- Mean average percentage of spend -



Source: Qa Research 2018 **Base:** 2018: 258,. 2014: 258 (all respondents)

As a mean average across all respondents, the average respondent in 2018 spent just under one fifth (18%) of their money '*in Bognor Regis town centre*'. This represented a statistically significant decline since the 2014 survey, were around one third (33%) of respondents' money on average was spend in the town centre. A large proportion of the change is due to the rise in internet shopping from 9% to 25%. It must be stressed that the 2018 sample contained a greater proportion of visitors to Bognor Regis than the 2014 sample, and that as these visitors live outside Bognor Regis it would naturally be expected that they spend much less money in the town on average, and that this brings the overall average down.

In both the 2014 and 2018 surveys the highest proportion of average spend goes to '*shops outside of Bognor Regis*', half (49% and 51% respectively) of respondents' money on average. The average proportion of money spent '*online*' has significantly increased since 2014 (9% in 2014 to 25% in 2018). This latter increase was also reflected nationally; the Financial Times reported that in 2014 online shopping represented around 16% of spend, increasing to 25% in 2017[6].

Given that the fieldwork took place in the town centre, it does not capture those who exclusively shop out of town or online; they would not have been present in the centre to be interview.

As shown in the table below, the decline for the average percentage of money spent in the '*town centre´* was observed in both residents and visitors. This has been driven by a significant increase in online spending amongst both groups,

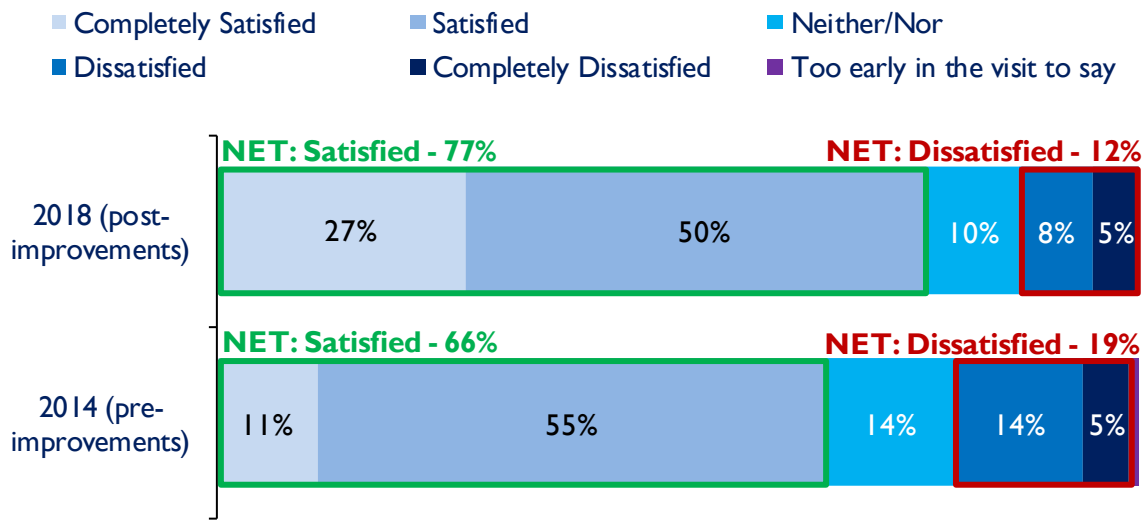
Mean percentage of money spent in…	***2014 (pre-improvements)***		***2018 (post-improvements)***	
	Residents	*Visitors*	*Residents*	*Visitors*
In shops outside of Bognor Regis	31%	77%	34%	65%
In Bognor Regis Town Centre	50%	12%	33%	5%
Online	9%	10%	22%	28%
In Bognor Regis, outside town centre	10%	2%	13%	2%
Base	***156***	***102***	***121***	***137***

[6] Financial Times; Online retail sales continue to soar (11 Jan 2018)

4.6 Satisfaction with Bognor Regis town centre

Respondents were asked a question to measure their satisfaction with their experience of Bognor Regis town centre. Answers were given on a one to five scale (five being 'completely satisfied') and the results are shown below;

Q6. And on a 1 to 5 scale, how satisfied are you with your experience of the town centre so far?



Source: Qa Research 2018 **Base:** 2018: 258,. 2014: 258 (all respondents)

Respondents were more satisfied with their overall experience of the town centre in 2018 than they were in 2014. The proportion who gave an answer of either '*completely satisfied*' or '*satisfied*' (i.e. Net: Satisfied) increased statistically significantly from 66% in the pre-improvements survey to 77% in the post-improvements survey. In addition, respondents who were satisfied in 2018 appeared to be more satisfied than respondents who were satisfied in 2014; a significantly greater proportion in 2018 reported that they were '*completely satisfied*' (11% vs. 27% in 2018). Overall, it is clear than satisfaction with the town centre has increased.

Results for residents and visitors individually, in 2018 and 2014, are shown in the table below.

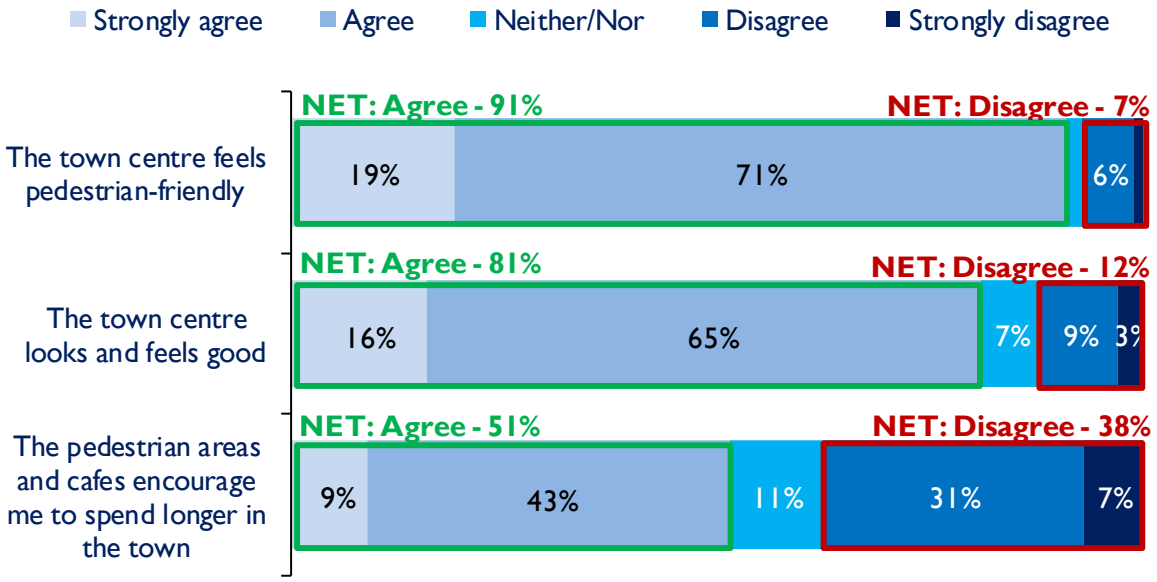
	Satisfaction with the town centre			
	2014 (pre-improvements)		*2018 (post-improvements)*	
	Residents	*Visitors*	*Residents*	*Visitors*
NET: Satisfied	61%	74%	65%	88%
NET: Dissatisfied	26%	9%	19%	7%
Base	***156***	***102***	***121***	***137***

The majority of both residents and visitors there satisfied with their experience of the town centre, and indeed satisfaction amongst visitors has statistically significantly increased since the 2014 survey; now almost nine-in-ten (88%) visitors report being satisfied (compared to 74% before).

4.7 Perceptions of the public realm improvements

The 2018 survey asked a number of new questions that were not included in the 2014 survey which aimed to gauge views on the public realm improvements and assess the perceived impact of these. These asked respondents to rate how far they agreed or disagreed with a series of statements, using a five point scale from '*strongly agree*' to '*strongly disagree*'.

Q9d. Thinking about the public realm improvements, how far do you agree with the following statements…



Source: Qa Research 2018 **Base:** 2018: 258 (all respondents)

Respondents perceived the town centre as both attractive and pedestrian friendly, with the vast majority (91%) agreeing that the town centre felt '*pedestrian friendly*' and eight-in-ten (81%) agreeing it '*looked and felt good*''. In both cases disagreement was low (7% and 12% respectively) and indeed for both statements the proportion that '*strongly agreed*' alone was greater than the proportion that '*disagreed*' or '*strongly disagreed*' combined.

Agreement that the '*pedestrian areas and cafes encouraged respondents to spend longer in the town*' was more polarised, however; whilst half did agree overall (i.e. Net: Agree) that this was the case (51%), there remained a significant minority (just over one third, 38%) who disagreed. Results earlier in the survey (Q5a) suggested that the mean average dwell time in town had actually decreased since the 2014 survey, however the results here suggest that more respondents than not felt the public realm improvements encouraged them to stay longer in the town.

Residents and visitors were equally likely to agree the town centre was '*pedestrian friendly*' and '*looked and felt good*', however visitors were significantly more likely than residents to agree the '*pedestrian areas and cafes encouraged them to spend longer in the town*' (66% vs. 35%)

	Percentage NET Agree	
	Residents	*Visitors*
The town centre feels pedestrian-friendly	88%	93%
The town centre looks and feels good	76%	85%
The pedestrian areas / cafes encourage me to spend longer in the town	35%	66%
Base	***121***	***137***

To further explore these results, respondents were asked if they had ever visited Bognor Regis before the public realm improvements had been made. The table below shows the results split by those who *had* visited Bognor Regis before the improvements were made (i.e. answered '*yes*') and those who had never seen Bognor Regis before the improvements (i.e. answered '*no*'). The '*no*' category were almost entirely visitors to Bognor Regis (93%), with around two fifths (42%) visiting the town centre for the first ever time (56% were on a repeat visit).

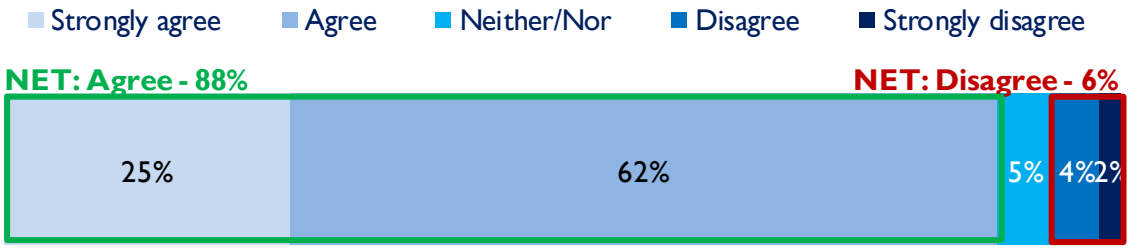
Q9d. Thinking about the public realm improvements, how far do you agree with the following statements?	**Percentage NET Agree Q9b. Visited Bognor Regis before the public realm improvements made?**	
	Yes	*No*
The town centre feels pedestrian-friendly	88%	93%
The town centre looks and feels good	75%	93%
The pedestrian areas and cafes encourage me to spend longer in the town	39%	75%
Base: All respondents	**173**	**85**

Visitors who had not visited Bognor Regis before the public realm improvements had been made were significantly more likely to agree overall to with each of these statements, compared to those who had visited the town before the implementation of the new public realm. The difference was especially marked for agreement that the '*pedestrian areas and cafes encourage me to spend longer in the town',* with those that had not seen the town pre-improvements almost twice as likely to agree as those that had (75% vs. 39%).

Respondents who had visited the town centre before the public realm improvements were asked how far they agreed or disagreed with an additional statement – that the town centre looked and felt better than it did before the public realm improvements. Results were thus based only on respondents qualified to make such as assessment and are shown in the chart below.

Q9d. Thinking about the public realm improvements, how far do you agree with the following statement…

The town centre looks and feels better than how it was before the improvements



Source: Qa Research 2018 **Base:** 2018: 173 (had visited Bognor Regis before the improvemnts were made)

The results clearly show that the considerable majority (88%) of respondents agreed that the town centre '*looked and felt better than how it was before improvements*. Indeed, one-in-four (25%) specifically '*strongly agreed*' that this was the case. The proportion who disagreed was very small (6%). Residents and visitors were equally likely to agree (88% and 79% respectively).

Respondents on a first time visit to Bognor Regis were asked if they '*found it easy to find their way from the train station though the town towards the seafront*', however the vast majority of respondents either didn't answer or answered '*don't know*' and so results were inconclusive.

5. Conclusions

The new public realm improvements have been well received by both residents & visitors, and are seen as an improvement over the previous public realm. The considerably majority of those who completed the survey agreed that the town centre felt pedestrian friendly and was aesthetically appealing. Visitors to Bognor Regis in particular agreed that this was the case, although a very high proportion of residents also did so. In addition, amongst those who had seen the previous pre-improvements town centre, nine-in-ten agreed that the new town centre looked and felt better than the previous – one in four strongly agreed that this was the case.

Overall satisfaction with the experience of the town centre amongst visitors has increased since the previous survey in 2014. In the previous survey, prior to the implementation of the improved public realm, three-quarters of visitors rated themselves as satisfied with the town centre but this has seen a statistically significant increase to almost nine-in-ten in the 2018 survey.

Data was inconclusive as to whether dwell time in the town centre has changed since this was last recorded in 2014. The mean average length of visit has seen a statistically significant decrease from 115 minutes in 2014 to 94 minutes in 2018. Mean average length of visit remained higher amongst visitors to Bognor Regis than amongst residents of the town, but for both groups the average dwell time has declined since the 2014 survey. However, when asked if the pedestrian areas and cafés in the town centre encouraged them to stay longer half of all respondents agreed that they did. These were twice as likely to encourage visitors to stay longer in the town than residents. Looking at all the data together, there is some indication that there may have been a decrease in dwell time, however the low base size and conflicting information regarding encouragement to stay in the town centre means that conclusions cannot be drawn from this data.

The average spend on food and drink in the town centre has increased significantly since the 2014 results, although the overall change in spending is unclear. The mean average spend on food and drink has doubled per person in the town centre since the 2014 survey, and although this remains significantly higher amongst visitors to the town it has increased amongst both residents and visitors. In contrast to this, however, the average spend of household goods has significantly decreased and this was driven primarily by a decline in spend amongst residents. When looking at the proportion of money spent in the town centre as opposed to outside the town centre, outside Bognor Regis, and online, this has declined significantly amongst both residents and visitors and this was driven by an increase in online shopping. The data is ultimately inconclusive; whilst overall average spend in the town has increased in some areas and decreased in others, respondents report spending a lower proportion (but crucially not lower amount) of their money in the town centre.

Data from this survey is insufficiently accurate to be considered *representative* of the public population of Bognor Regis Town centre. This is due to the low sample size, which means that there is too much potentially variability in the data to generalise the findings to all residents and visitors to the town centre. Whilst the findings do give an indicative steer, they should not be taken beyond this.

6. Appendix

6.1 Questionnaire

Bognor Regis Public Survey 2018

Interviewer	Date of Interview DD/MM/YY
	_____DD _____MM _____YY
Time (Duration)	Survey Number (internal use)
Inputted (internal use)	Q-C (internal use)

Good morning/afternoon/evening, my name is… and I'm from Qa Research.

I'm working on behalf of Arun District Council, and I'm talking to local residents and visitors to the town centre.

The Council is looking to evaluate the improvements to the public spaces in the town centre. We are trying to help the Council understand the level of spending by residents and visitors in the town centre as part of that process.

We would really appreciate it if you could spare five to eight minutes to answer a few questions with me?

Before we begin, I'd like to reassure you that this interview will be carried out according to the Market Research Society's Code of Conduct and all your answers and information you provide will be treated as anonymous and confidential in accordance with the Data Protection Act 1998.

Q1. Are you a local resident of Bognor Regis or are you visiting? [SHOWCARD 1]		(S)	Go to
Resident – town centre	1	1	Q3a
Resident – wider Bognor Regis including Aldwick, Felpham, Bersted, Pagham, Flansham, Middleton	2	2	Q3a
Visiting from local towns including Littlehampton, Yapton, Barnham, Worthing, Chichester, Selsey	3	3	Continue
Visiting from further away	4	4	Continue

Q2. As a visitor to Bognor Regis, are you on a… [SHOWCARD 2]		(S)
Day trip - from your home outside Bognor Regis	1	1
Day trip - visiting while holidaying somewhere else outside Bognor Regis	2	2
Staying - visitor in overnight accommodation within Bognor Regis	3	3
Staying - visitor with friends or relatives within Bognor Regis	4	4
Staying - visitor - other (specify)	5	5

Q3a. How often do you usually/would you plan to visit Bognor Regis Town Centre for shopping or for leisure?		(S)	Go to
Every day	1	1	Q4
On most days	2	2	Q4
Once or twice a week	3	3	Continue
Once a twice a month	4	4	Continue
Less than once a month	5	5	Continue

Q3b What attractions would make you want to come here more often?	
	No comment 1

Q4. Apart from Bognor Regis, where else do you go for shopping and leisure at least once a month? [SHOWCARD 3]		(M)
Chichester	1	1
Littlehampton	2	2
Worthing	3	3
Arundel	4	4
Selsey	5	5
Shoreham-by-Sea	6	6
Portsmouth	7	7
Gunwharf Quays	8	8
Brighton	9	9
Southampton	10	10
London	11	11
←------- Other (please state)	12	12
None of the above	13	13

Q5a. How long do you intend to spend in the Town Centre today?		(S)
Hours : Minutes	:	
Don't know [Do not prompt]	1	1

Q5b. Is this your average length of trip to the town centre?		(S)	Go to
Yes	1	1	Q6
No	2	2	Q5c

Q5c. What is the average length of your trips to the town centre?		(S)
Hours : Minutes	:	
Don't know [Do not prompt]	1	1

Q6. And on a one to five scale where one is Completely Dissatisfied and five is Completely Satisfied, how satisfied are you with your experience of the town centre so far?
[SHOWCARD 4]

Completely Dissatisfied	Dissatisfied	Neither / Nor	Satisfied	Completely Satisfied	Don't know [Do not prompt]	Too early in visit to say [Do not prompt]
1	2	3	4	5	6	7

Q7. Approximately, how much in total have you and your party spent or do you expect to spend on today's trip <u>in the town centre</u> on the following… (If 'nothing' enter ZERO)		Don't know
Food and drink in cafés, restaurants, bars, etc., excluding any that are included in the price of accommodation.	£	①
Household goods shopping, for example; food, drink, toiletries, etc.	£	①
Shopping for clothes or shoes.	£	①
Getting beauty treatments, such as haircuts, pedicures, manicures, or other.	£	①
Souvenirs or gifts	£	①
Attractions and entertainment activities e.g. theatre, concert and cinema tickets, clubs, going to the arcades, admission to attractions	£	①
Other spending ←--- (specify)	£	①

Q8. So in total, you have spent or expect to spend about… **[Add up all values at Q7]** **Is that about the right figure?**		(S)	
Yes	1	①	Continue
No	2	②	Go back to Q7 to clarify amounts.

Q9a. Thinking about your shopping and leisure trips overall, what percentage of your money do you tend to spend in… [MUST ADD TO 100%]		Don't Know
In Bognor Regis town centre	%	①
In Bognor Regis, outside of the town centre	%	①
In shops away from Bognor Regis	%	①

Online	%	1

Public realm improvements

This next question is about the public realm improvements in the town – so the paving, street furniture, planting, lighting etc, - that have been made over the last few years.

Q9b. Have you ever visited / been to Bognor Regis town center <u>before</u> these public realm improvements were made?			(S)	Go to
	Yes	1	1	**Q9d**
	No	2	2	**Q9c**

Q9c. Is this your <u>first ever time</u> visiting Bognor Regis town center?			(S)	Go to
	Yes	1	1	**Q9d**
	No	2	2	**Q9d**

Q9d. Thinking about the public realm improvements, on a one to five scale where one is Strongly Disagree and five is Strongly Agree how far do you agree with the following statements…
[SHOWCARD 5]

	Strongly disagree	Disagree	Neither/ Nor	Agree	Strongly agree	Don't know / [Do not prompt]
The town center looks and feels good	1	2	3	4	5	6
The town centre feels pedestrian-friendly	1	2	3	4	5	6
The pedestrian areas and cafes encourage me to spend longer in the town	1	2	3	4	5	6
IF Q9b = 'Yes' The town centre looks and feels better than how it was before the improvements	1	2	3	4	5	6
IF Q9c = 'Yes' It was easy to find my way from the train station through the town towards the seafront	1	2	3	4	5	6

Demographics

Finally the last few questions are about yourself in order to ensure that we speak to a broad cross section of people.

Q10. How many for the following are in your party, those who are your family and friends…. (If 'none' enter ZERO)

Adults, aged 16 to 64 →		Adults, aged 65 and over →		Children (up to the age of 15) →	

Q11. Are You *(please mark one only)*

Male	1
Female	2
Prefer not to say	3

Q12. Which of the following age groups do you belong to?

16-24	1
25 – 34	2
35 -44	3
45 – 54	4
55 – 64	5
65 +	6
Prefer not to say	7

Q13. What is your home postcode?

This will be used for analysis purposes only.
It will not be used to identify you, or be passed on to any third parties

Or country of residence if visiting from overseas? *(please write in)*

Q14. As part of our quality control procedure, a research supervisor may contact you in order to confirm the accuracy of the interview and to ensure you were happy with the interview. Would you be prepared to give your contact details for this purpose?

Yes – *capture name and telephone number below*	1	1
No – *please can you (interviewee) sign to say that you have refused:*	2	2

Interviewee signature: .....

Name	Telephone

Thank and close