



East Sussex Consumer Tourism Survey Spring 2021

Written By: Joanne Rogers, Prowse & Co. Ltd



8 April 2021

Research Scope & Partners

- 3,254 people responded to this online survey between 15 February and 31 March 2021.
- The survey was conducted independently by Prowse & Co. Ltd under the guidelines of the Market Research Society.
- It was promoted via a Visit Eastbourne subscriber newsletter; online via social media platforms; among the Eastbourne Hospitality Association (EHA) membership; and via EDEAL contacts.
- An incentive to enter a free prize draw and win a £200 voucher was kindly provided by the Eastbourne Hospitality Association to encourage entries.

Survey Partners:



Respondents' Profile:

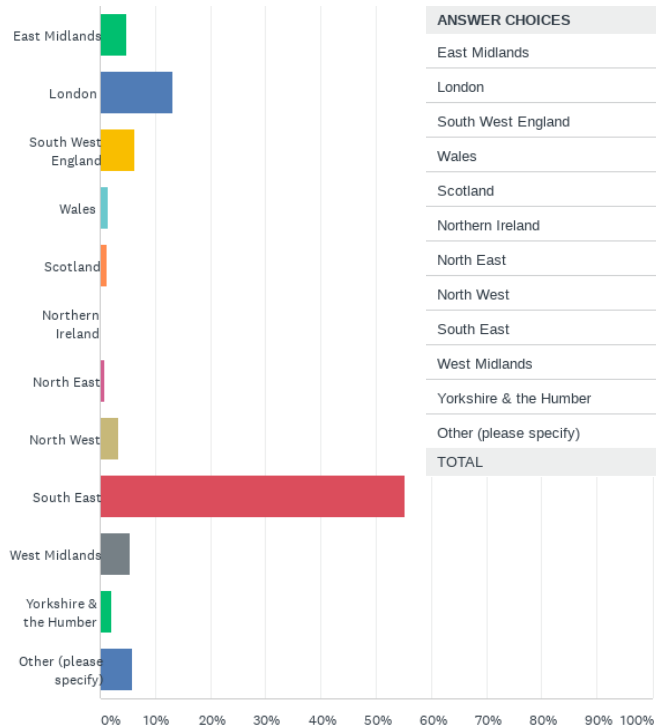
(Reference Q1, Q2, Q23)

- Most respondents are aged 45 years and above (80%).
- Most respondents live in South-East England (55%), followed by London (13%) and South West England (6%). Just 1.6% of respondents live overseas.
- 81% want to be emailed with information about holidays and visits to East Sussex. However, this varies across respondent age ranges. Only 10% of those under 18 and 34% of those aged 18 to 24 wish to receive further information by email.

➤ **Insight Action:** Should incentivised promotions targeted at a younger demographic be run alongside data collection competitions on social media to attract younger subscribers?

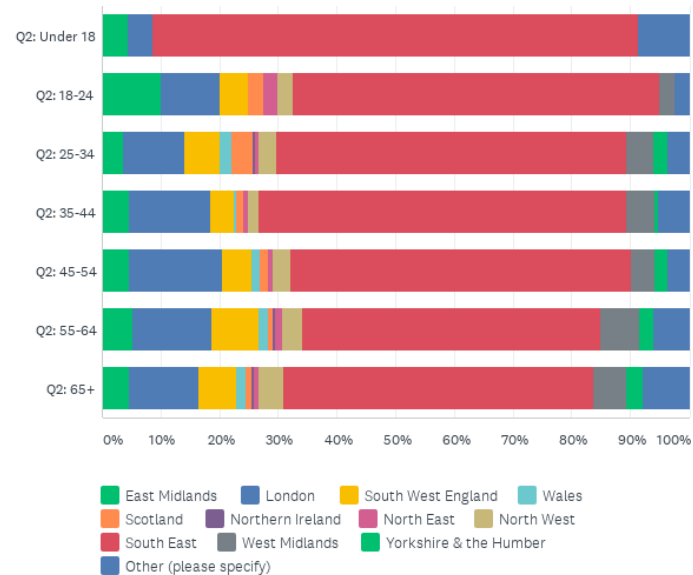
Q1: Where do you currently live?

Answered: 3,254 Skipped: 0



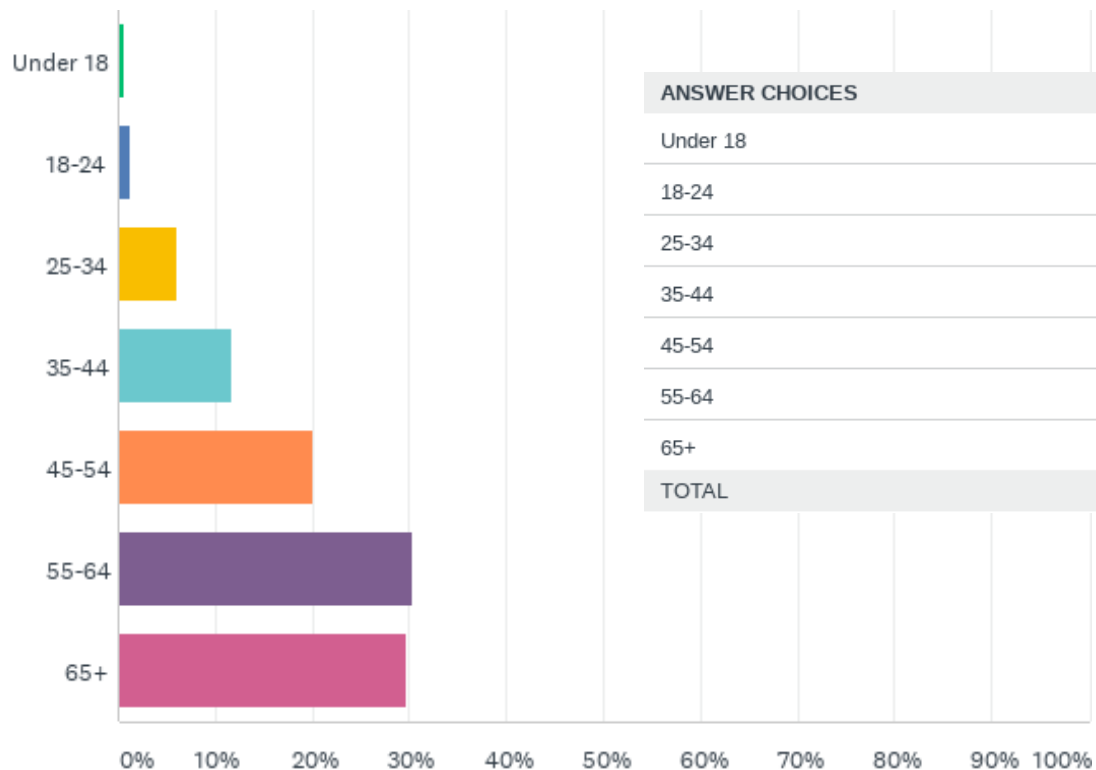
ANSWER CHOICES	RESPONSES
East Midlands	4.82%
London	13.21%
South West England	6.27%
Wales	1.38%
Scotland	1.26%
Northern Ireland	0.25%
North East	0.89%
North West	3.32%
South East	55.19%
West Midlands	5.41%
Yorkshire & the Humber	2.18%
Other (please specify)	5.81%
TOTAL	3,254

Location by Age



Q2: What is your age?

Answered: 3,254 Skipped: 0



ANSWER CHOICES	RESPONSES
Under 18	0.71% 23
18-24	1.23% 40
25-34	6.12% 199
35-44	11.77% 383
45-54	20.16% 656
55-64	30.33% 987
65+	29.69% 966
TOTAL	3,254

Q23: Would you like to be emailed with information about holidays and visits to East Sussex?

Answered: 2,979 Skipped: 275

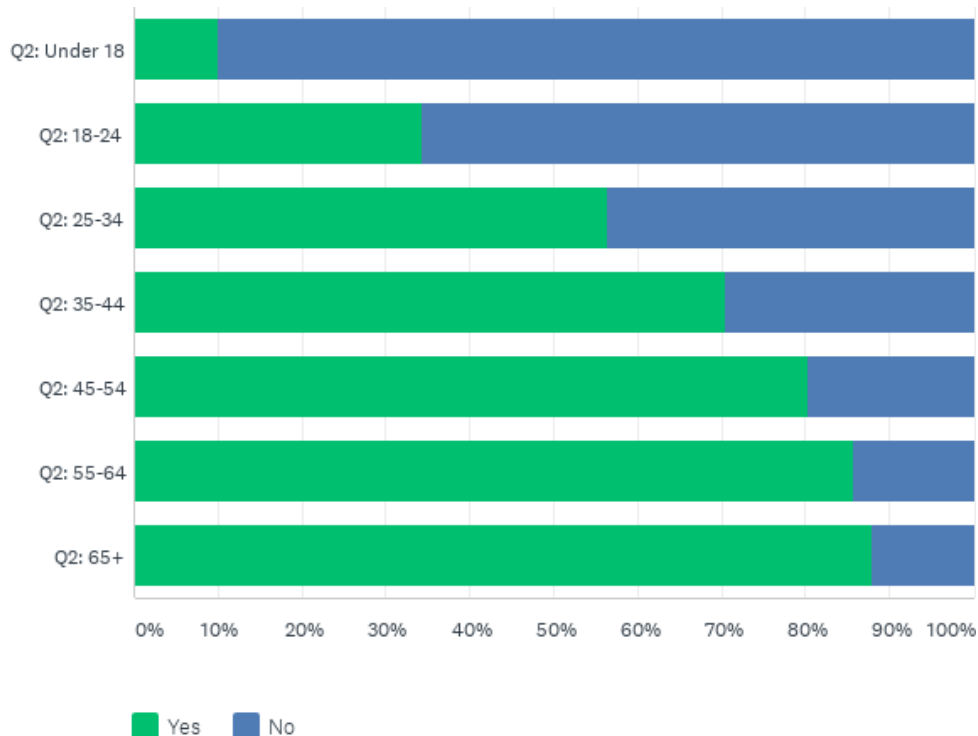
All data

ANSWER CHOICES	RESPONSES	
Yes	80.83%	2,408
No	19.17%	571
TOTAL		2,979

By Age

	YES	NO	TOTAL
Q2: Under 18	10.00% 1	90.00% 9	0.34% 10
Q2: 18-24	34.29% 12	65.71% 23	1.17% 35
Q2: 25-34	56.45% 105	43.55% 81	6.24% 186
Q2: 35-44	70.52% 244	29.48% 102	11.61% 346
Q2: 45-54	80.23% 483	19.77% 119	20.21% 602
Q2: 55-64	85.68% 784	14.32% 131	30.72% 915
Q2: 65+	88.02% 779	11.98% 106	29.71% 885
Total Respondents	2,408	571	2,979

By Age



Where do people go online to find holiday inspiration when booking a UK holiday? (Reference Q3)

- **Local Tourism Websites** (59%) and **Search Engines** (58%) are the most used online channels to find holiday inspiration.
- Tiktok, Pinterest, Twitter and YouTube are the least used online channels.
- The popularity of different online platforms varies widely by age group.
- **Aged 44 and under:** Search Engines (61%), Hotel Websites (47%) and Local Tourism Websites are the most popular online sources.
- **Aged 45 +:** Local Tourism Websites (64%), Search Engines (58%) and Hotel Websites (52%) are the most used.

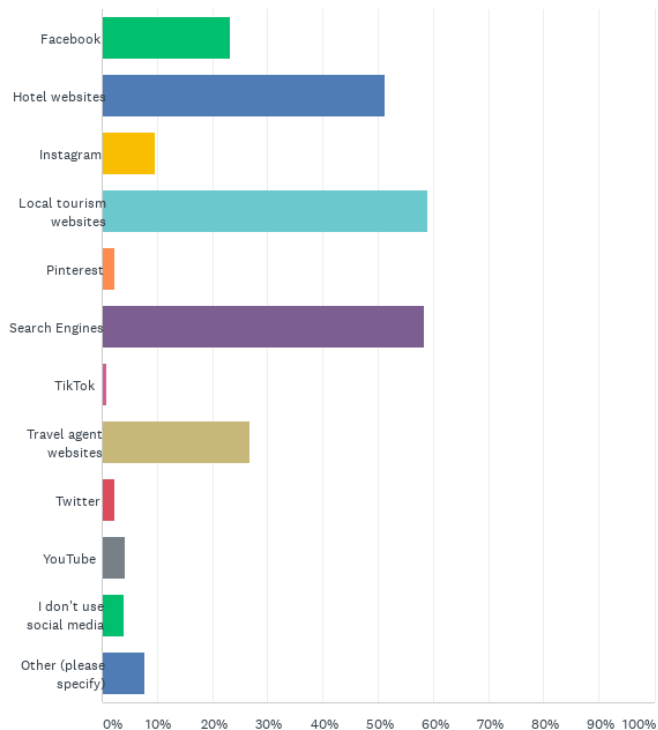
➤ **Insight:** This shows the importance of ensuring all local tourism and accommodation websites are properly optimised via SEO keywords

Analysing the data further, the most popular online channels in priority order by age are:

- **Age Under 18:** Pinterest, Tiktok & YouTube
- **Age 18 to 24:** Hotel Websites, Search Engines & Instagram
- **Age 35 to 44:** Search Engines, Hotel Websites & Local Tourism Websites
- **Age 45 to 54:** Search Engines, Local Tourism Websites & Hotel Websites
- **Age 55 +:** Local Tourism Websites, Search Engines & Hotel Websites

Q3: Where do you go online to find holiday inspiration or information – all data

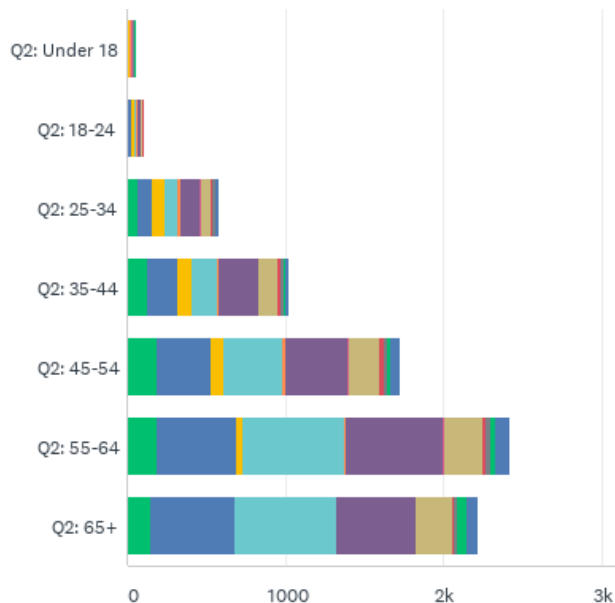
Answered: 3,254 Skipped: 0



ANSWER CHOICES	RESPONSES
Facebook	23.26% 757
Hotel websites	51.35% 1,671
Instagram	9.62% 313
Local tourism websites	59.07% 1,922
Pinterest	2.27% 74
Search Engines	58.45% 1,902
TikTok	0.86% 28
Travel agent websites	26.83% 873
Twitter	2.40% 78
YouTube	4.24% 138
I don't use social media	3.87% 126
Other (please specify)	7.74% 252
Total Respondents: 3,254	

Q3: Where do you go online to find holiday inspiration or information – By age

Answered: 3,254 Skipped: 0



	FACEBOOK	HOTEL WEBSITES	INSTAGRAM	LOCAL TOURISM WEBSITES	PINTEREST	SEARCH ENGINES	TIKTOK	TRAVEL AGENT WEBSITES	TWITTER	YOUTUBE
Q2: Under 18	13.04% 3	26.09% 6	30.43% 7	8.70% 2	34.78% 8	17.39% 4	34.78% 8	26.09% 6	4.35% 1	34.78% 8
Q2: 18-24	22.50% 9	60.00% 24	40.00% 16	32.50% 13	12.50% 5	57.50% 23	7.50% 3	30.00% 12	2.50% 1	12.50% 5
Q2: 25-34	37.69% 75	43.22% 86	39.70% 79	43.22% 86	7.54% 15	59.80% 119	3.52% 7	31.16% 62	6.03% 12	11.56% 23
Q2: 35-44	35.25% 135	48.83% 187	23.24% 89	42.30% 162	2.87% 11	63.97% 245	1.31% 5	31.07% 119	4.18% 16	6.53% 25
Q2: 45-54	29.42% 193	51.52% 338	11.89% 78	56.40% 370	3.05% 20	61.13% 401	0.15% 1	30.34% 199	3.66% 24	4.12% 27
Q2: 55-64	19.76% 195	50.46% 498	3.85% 38	65.45% 646	1.32% 13	62.11% 613	0.30% 3	24.82% 245	1.52% 15	3.24% 32
Q2: 65+	15.22% 147	55.07% 532	0.62% 6	66.56% 643	0.21% 2	51.45% 497	0.10% 1	23.81% 230	0.93% 9	1.86% 18
Total Respondents	757	1,671	313	1,922	74	1,902	28	873	78	138

- Facebook
- Hotel websites
- Instagram
- Local tourism websites
- Pinterest
- Search Engines
- TikTok
- Travel agent websites
- Twitter
- YouTube
- I don't use social media
- Other (please specify)

Q3: Where do you go online to find holiday inspiration or information – By age

Answered: 3,254 Skipped: 0

Under 45

ANSWER CHOICES	RESPONSES	
Facebook	34.42%	222
Hotel websites	46.98%	303
Instagram	29.61%	191
Local tourism websites	40.78%	263
Pinterest	6.05%	39
Search Engines	60.62%	391
TikTok	3.57%	23
Travel agent websites	30.85%	199
Twitter	4.65%	30
YouTube	9.46%	61
I don't use social media	2.33%	15
Other (please specify)	5.89%	38
Total Respondents: 645		

Aged 45+

ANSWER CHOICES	RESPONSES	
Facebook	20.51%	535
Hotel websites	52.43%	1,368
Instagram	4.68%	122
Local tourism websites	63.59%	1,659
Pinterest	1.34%	35
Search Engines	57.91%	1,511
TikTok	0.19%	5
Travel agent websites	25.83%	674
Twitter	1.84%	48
YouTube	2.95%	77
I don't use social media	4.25%	111
Other (please specify)	8.20%	214
Total Respondents: 2,609		

What activities are of most interest to people when considering a UK holiday? (Reference Q4)

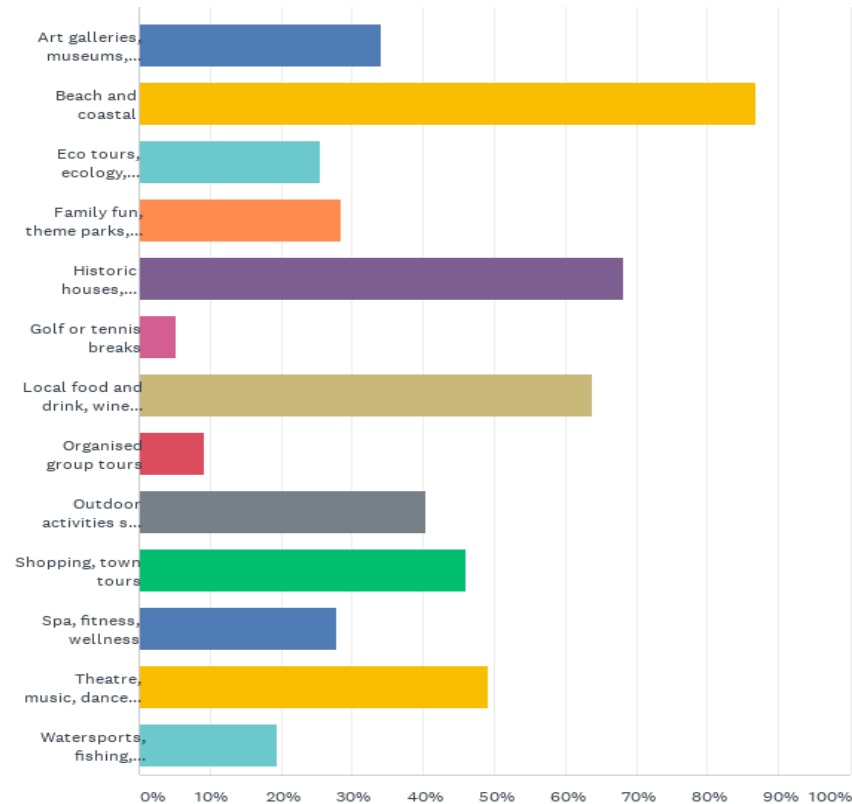
- The survey showed the top three activities overall were:
 1. *Beach and Coastal activities* (87%)
 2. *Historic Houses, Gardens and Parks* (68%)
 3. *Local food and Drink including wine tours, local markets and fine dining* (64%).
- *Golf and tennis breaks* (5%) and *Organised group tours* (9%) were the least popular activities.

- For those aged 44 and under:
the most popular activities were *Beach and Coastal* (90%) *Local food and drink* (61%) and *Family Fun including theme parks and animal attractions* (60%).
- For those aged 45+:
the most popular activities were *Beach and Coastal* (86%); *Historic houses gardens and parks* (71%) and *Local food and drink* (64%). *Theatre, Music, Dance, Concerts and Opera* also proved popular for this age group (51%).

Q4: Which of the following activities are of interest to you when considering a holiday or short break? - All data

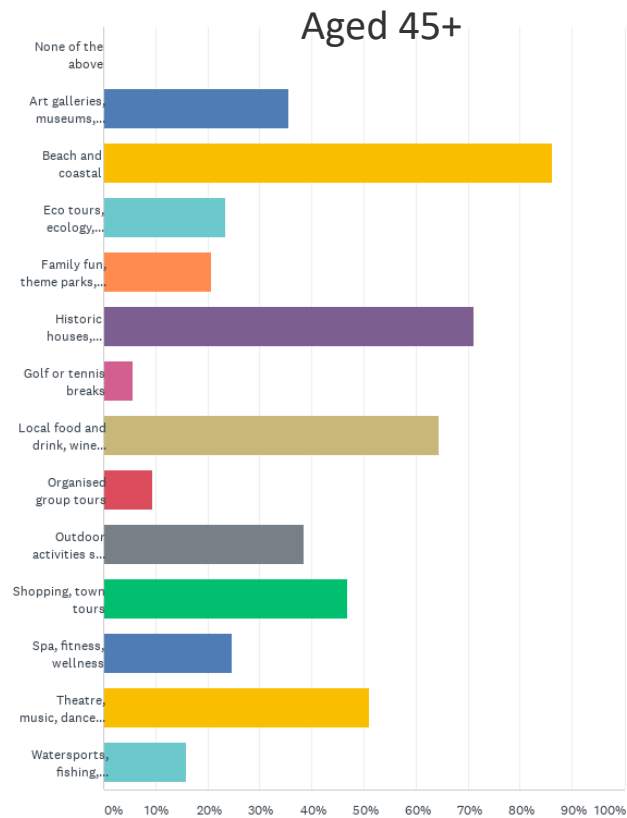
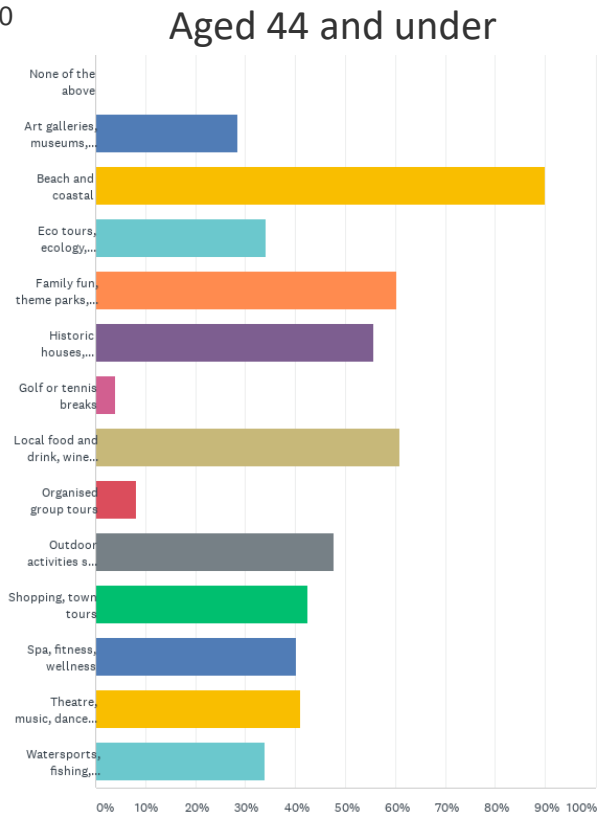
Answered: 3,254 Skipped: 0

ANSWER CHOICES	RESPONSES
None of the above	0.00% 0
Art galleries, museums, painting retreats	34.11% 1,110
Beach and coastal	86.88% 2,827
Eco tours, ecology, wildlife, astronomy	25.51% 830
Family fun, theme parks, animal attractions	28.55% 929
Historic houses, gardens, parks	68.13% 2,217
Golf or tennis breaks	5.32% 173
Local food and drink, wine estate tours & tastings, local markets, fine dining	63.74% 2,074
Organised group tours	9.22% 300
Outdoor activities such as walking, hiking, cycling	40.35% 1,313
Shopping, town tours	46.00% 1,497
Spa, fitness, wellness	27.78% 904
Theatre, music, dance, concerts, opera	49.08% 1,597
Watersports, fishing, boating, kayaking, swimming	19.39% 631



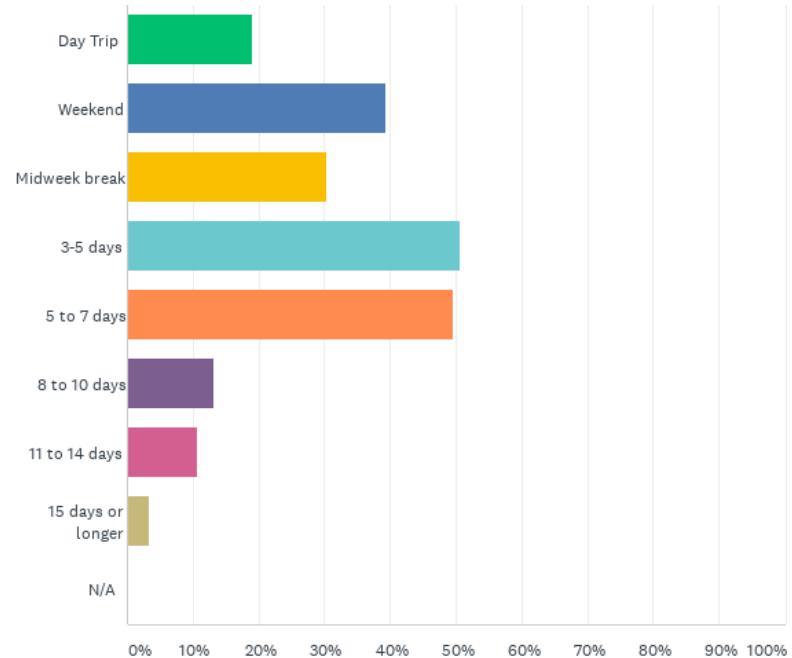
Q4: Which of the following activities are of interest to you when considering a holiday or short break?

Answered: 3,254 Skipped: 0



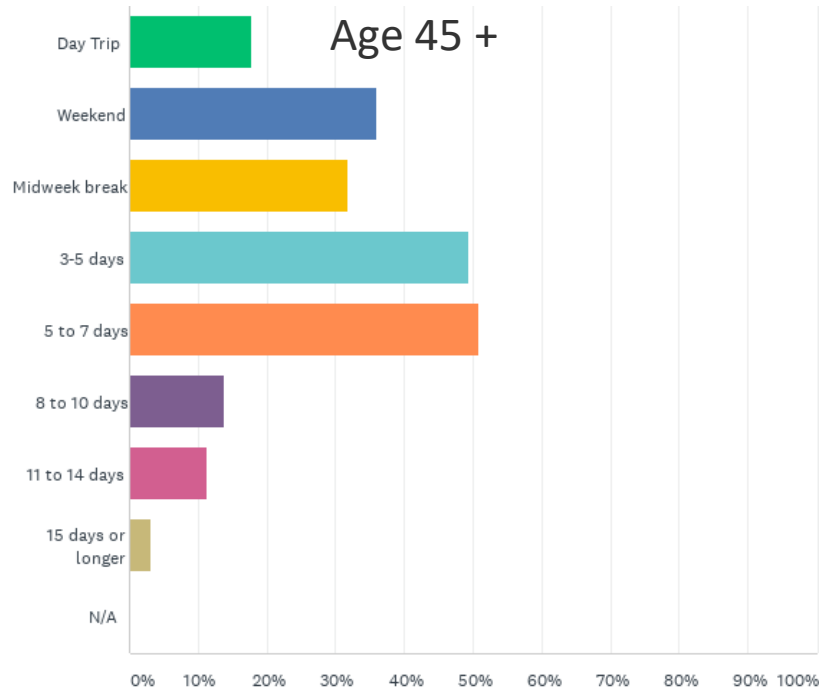
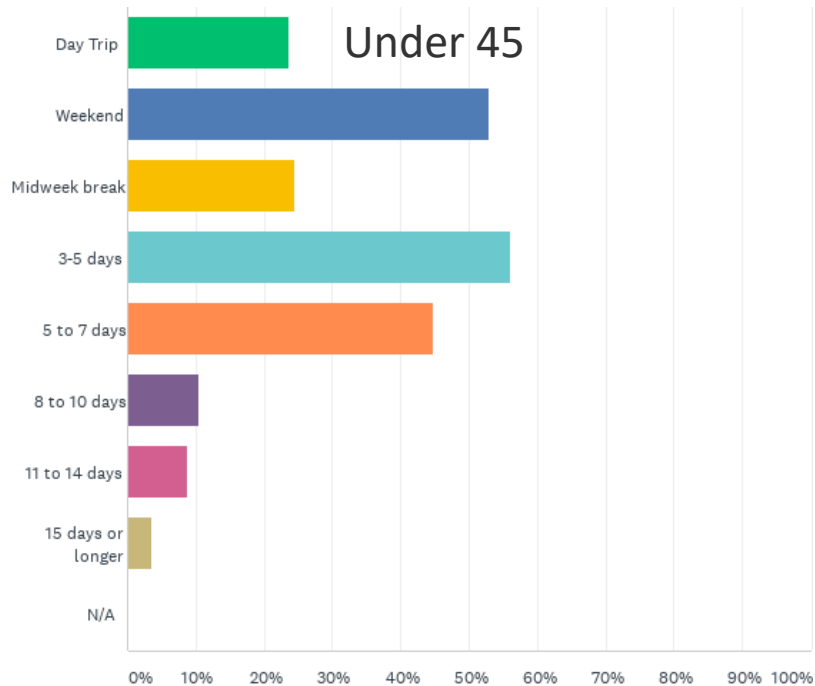
What is the preferred length of a UK holiday/break? (Reference Q5)

- Overall, the most popular lengths of stay for a UK are 3-5 days (51%) & 5-7 days (50%), followed by weekend breaks (39%).
- For those aged under 44, visits of between 3-5 days & weekend breaks are the most popular.
- For those aged 45 years +, 5-7 days & 3-5 days are preferred.



Q5: If taking a UK holiday or break, how long do you like your trips to be?

Answered: 3,254 Skipped: 0



Q5: If taking a UK holiday or break, how long do you like your trips to be? - All data by age

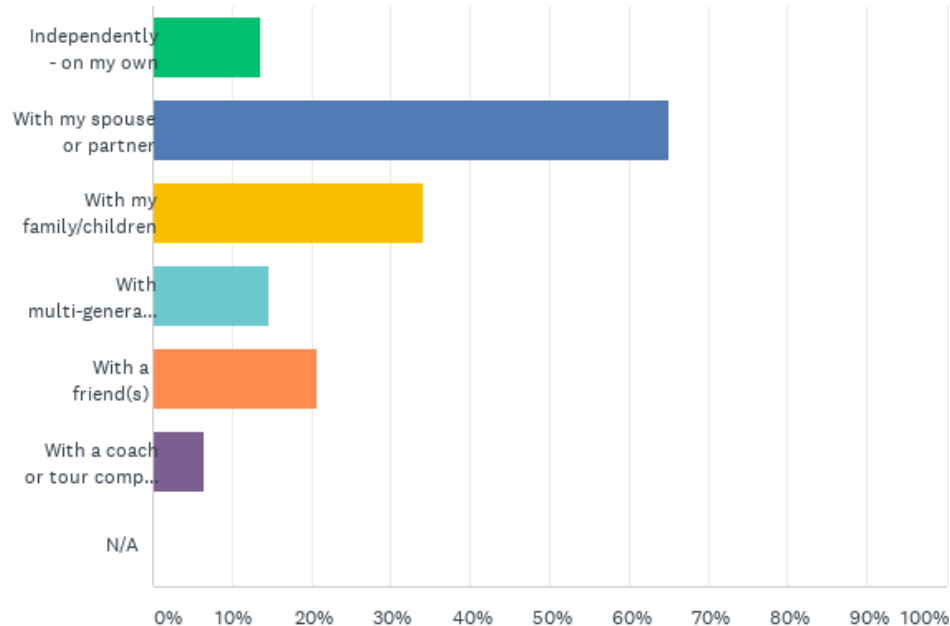
Answered: 3,254 Skipped: 0

	DAY TRIP	WEEKEND	MIDWEEK BREAK	3-5 DAYS	5 TO 7 DAYS	8 TO 10 DAYS	11 TO 14 DAYS	15 DAYS OR LONGER	N/A	TOTAL
Q2: Under 18	13.04% 3	21.74% 5	0.00% 0	8.70% 2	26.09% 6	26.09% 6	21.74% 5	17.39% 4	0.00% 0	0.95% 31
Q2: 18-24	20.00% 8	50.00% 20	25.00% 10	70.00% 28	45.00% 18	12.50% 5	12.50% 5	7.50% 3	0.00% 0	2.98% 97
Q2: 25-34	22.61% 45	54.77% 109	24.12% 48	63.32% 126	41.21% 82	6.53% 13	5.03% 10	2.51% 5	1.01% 2	13.52% 440
Q2: 35-44	25.07% 96	54.05% 207	26.11% 100	53.79% 206	47.78% 183	11.23% 43	9.66% 37	2.87% 11	0.00% 0	27.14% 883
Q2: 45-54	19.82% 130	48.48% 318	28.05% 184	51.37% 337	51.98% 341	11.43% 75	8.99% 59	1.98% 13	0.30% 2	44.84% 1,459
Q2: 55-64	19.05% 188	38.40% 379	29.69% 293	49.04% 484	51.57% 509	14.69% 145	11.75% 116	3.44% 34	0.10% 1	66.04% 2,149
Q2: 65+	15.22% 147	25.26% 244	36.44% 352	48.24% 466	49.07% 474	14.49% 140	12.22% 118	3.83% 37	0.00% 0	60.79% 1,978
Total Respondents	617	1,282	987	1,649	1,613	427	350	107	5	3,254

Who do people travel with when taking a UK holiday?

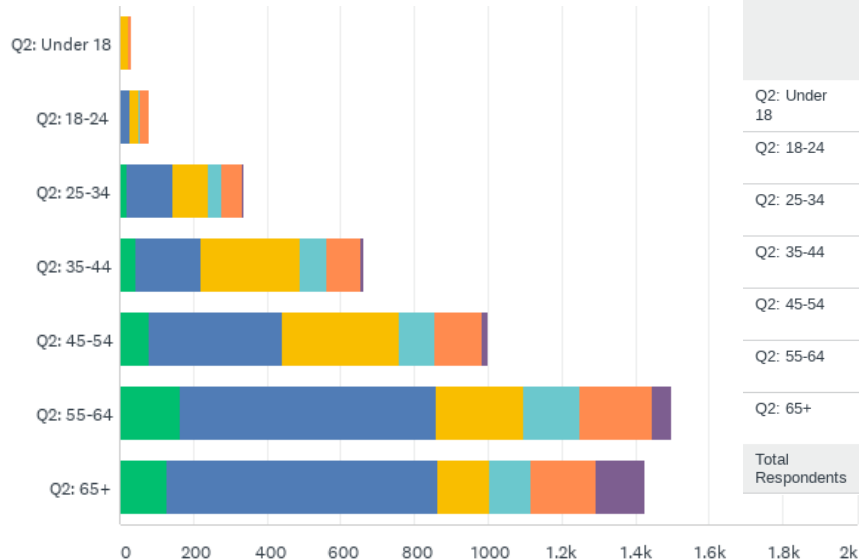
(Reference Q6)

- Overall, respondents travel most often with their spouse or partner (65%).
- This was followed by travelling with family/children at 34%.
- Those aged 18-24 travel mostly with family or friends.
- Those aged 25-34 travel with their spouse or partner (62%) or with family/children (49%).
- Those aged 35-44 travel with family/children (70%), or with their spouse (47%).
- Those aged 45 + travel most with their spouse or partner (71%)



Q6: If taking a UK holiday/break, with whom do you most often travel? (all data by age)

Answered: 3,254 Skipped: 0

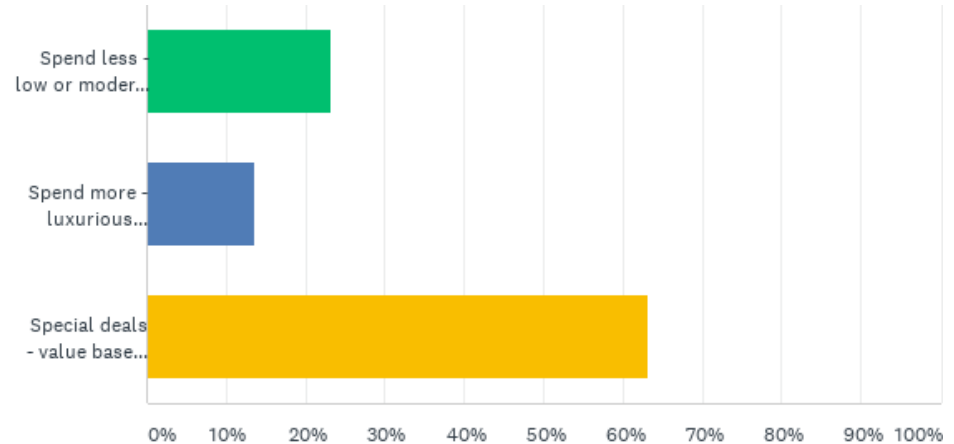


	INDEPENDENTLY - ON MY OWN	WITH MY SPOUSE OR PARTNER	WITH MY FAMILY/CHILDREN	WITH MULTI-GENERATION FAMILY MEMBERS	WITH A FRIEND(S)	WITH A COACH OR TOUR COMPANY GROUP	N/A	TOTAL
Q2: Under 18	4.35% 1	0.00% 0	95.65% 22	4.35% 1	30.43% 7	0.00% 0	0.00% 0	0.95% 31
Q2: 18-24	12.50% 5	57.50% 23	65.00% 26	7.50% 3	60.00% 24	0.00% 0	0.00% 0	2.49% 81
Q2: 25-34	10.05% 20	62.31% 124	49.25% 98	18.59% 37	28.14% 56	1.51% 3	0.00% 0	10.39% 338
Q2: 35-44	11.23% 43	46.74% 179	69.97% 268	19.06% 73	24.02% 92	1.83% 7	0.00% 0	20.34% 662
Q2: 45-54	12.04% 79	55.49% 364	48.02% 315	14.94% 98	19.36% 127	2.44% 16	0.15% 1	30.73% 1,000
Q2: 55-64	16.62% 164	70.62% 697	24.01% 237	15.40% 152	19.76% 195	5.17% 51	0.10% 1	46.00% 1,497
Q2: 65+	13.46% 130	75.88% 733	14.70% 142	11.49% 111	18.22% 176	13.98% 135	0.00% 0	43.85% 1,427
Total Respondents	442	2,120	1,108	475	677	212	2	3,254

■ Independently - on my own
 ■ With my spouse or partner
■ With my family/children
 ■ With multi-generation family members
■ With a friend(s)
 ■ With a coach or tour company group
 ■ N/A

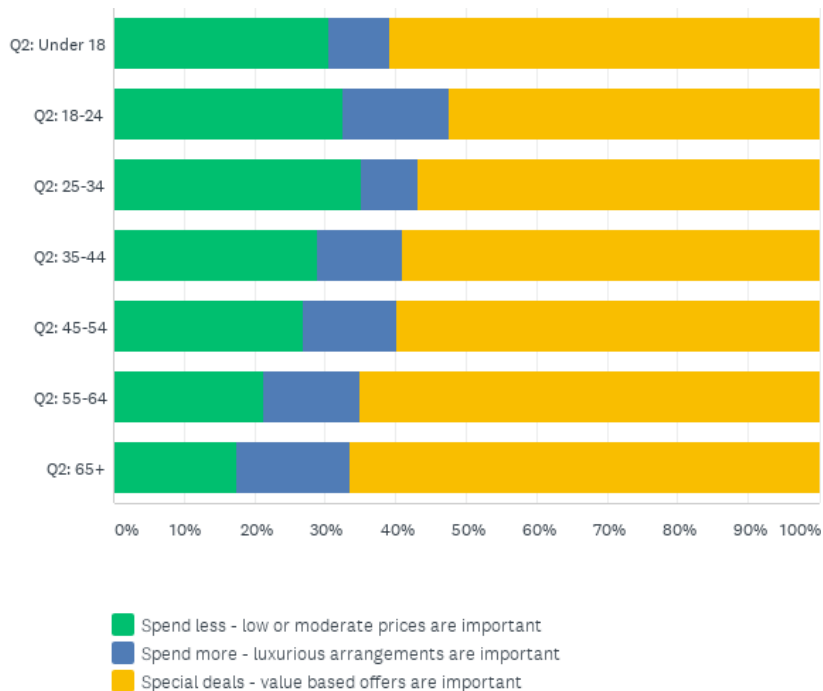
What is the most important price-point for those booking a UK holiday break? (Reference Q7)

- Most respondents are seeking special deals and value-based offers (63%).
- Only 14% of respondents are prepared to spend more on a luxurious stay.
- These trends are seen in all age groups.



Q7: Holiday Cost: Which is more important to you if booking a UK holiday? (All data by age)

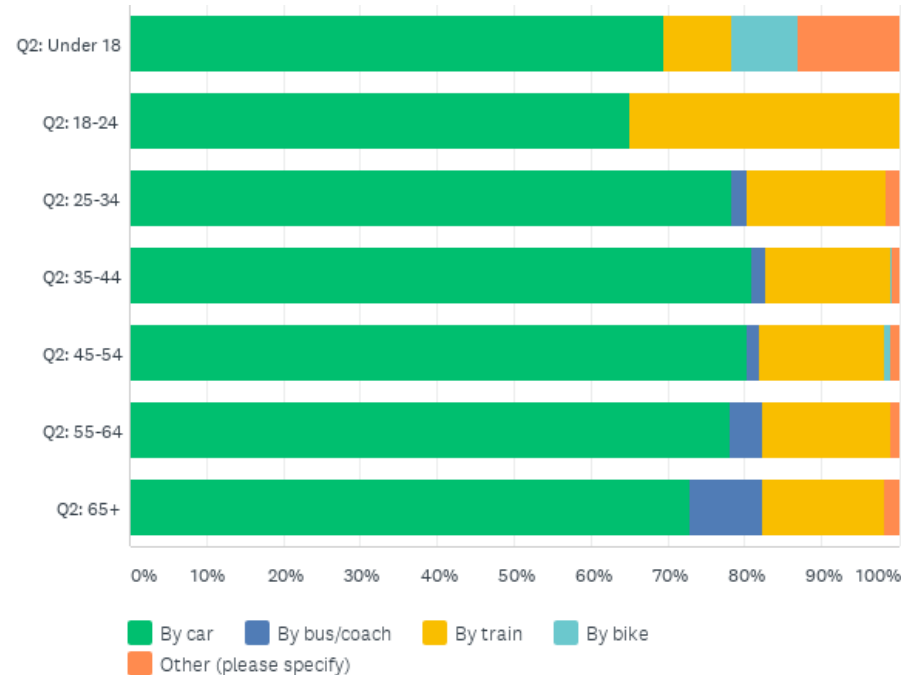
Answered: 3,254 Skipped: 0



	SPEND LESS - LOW OR MODERATE PRICES ARE IMPORTANT	SPEND MORE - LUXURIOUS ARRANGEMENTS ARE IMPORTANT	SPECIAL DEALS - VALUE BASED OFFERS ARE IMPORTANT	TOTAL
Q2: Under 18	30.43% 7	8.70% 2	60.87% 14	0.71% 23
Q2: 18-24	32.50% 13	15.00% 6	52.50% 21	1.23% 40
Q2: 25-34	35.18% 70	8.04% 16	56.78% 113	6.12% 199
Q2: 35-44	28.98% 111	12.01% 46	59.01% 226	11.77% 383
Q2: 45-54	26.98% 177	13.11% 86	59.91% 393	20.16% 656
Q2: 55-64	21.28% 210	13.58% 134	65.15% 643	30.33% 987
Q2: 65+	17.39% 168	16.05% 155	66.56% 643	29.69% 966
Total Respondents	756	445	2,053	3,254

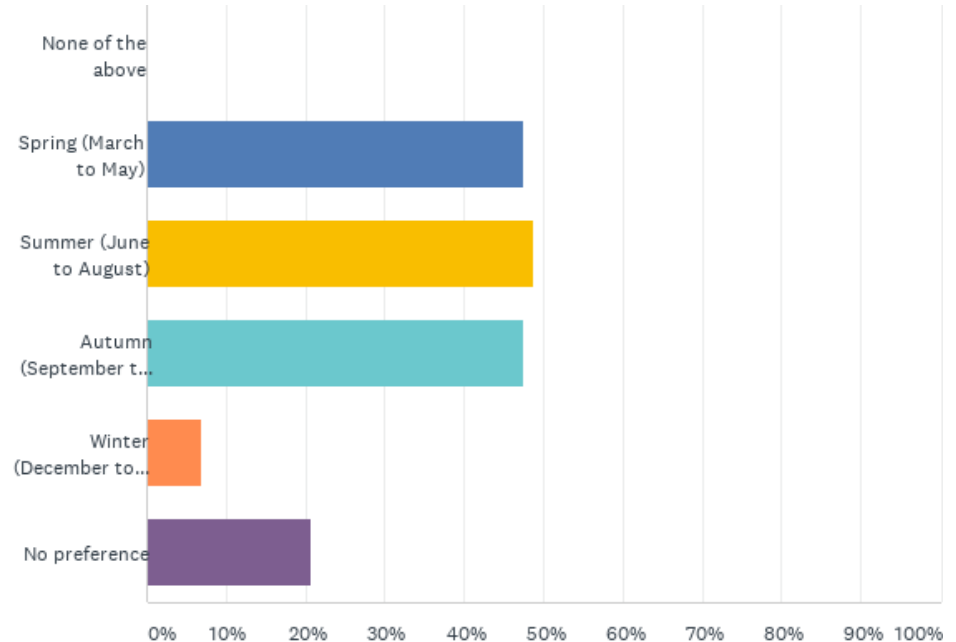
How do people prefer to travel when taking a UK holiday break? (Reference Q8)

- Travelling by car is the preferred method of transport for all age groups (77%).
- However, more than one third of those aged 18 to 24 prefer train travel.
- Only 9% of those aged 65+ prefer bus or coach travel.



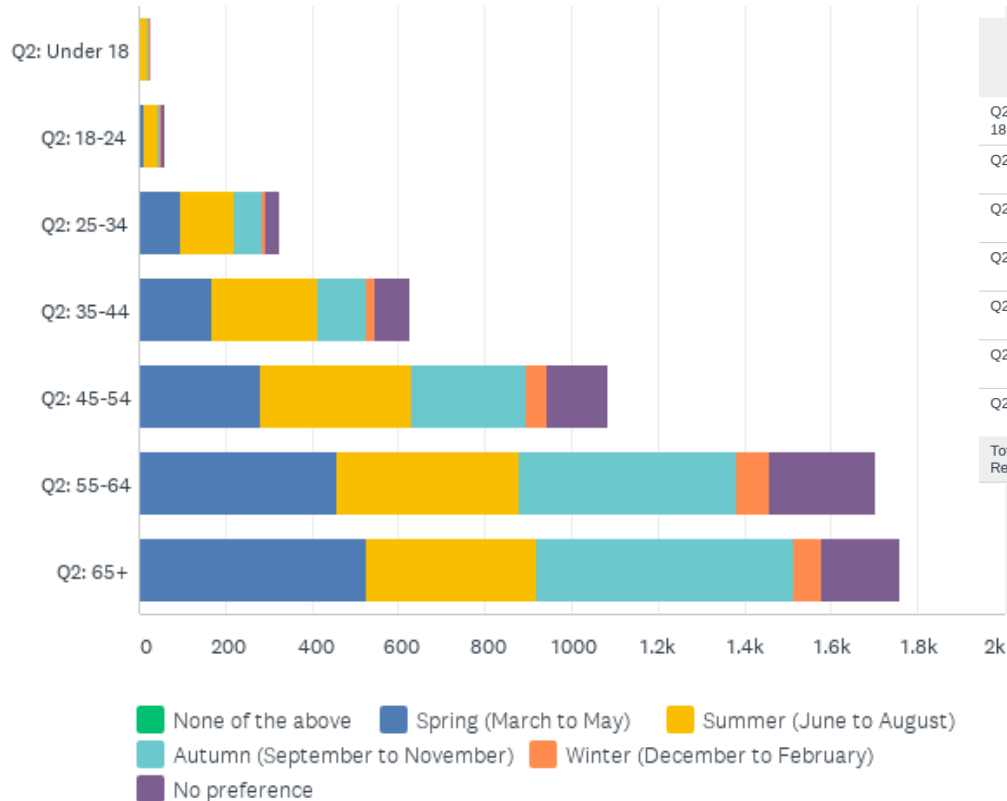
When do people prefer to take a UK holiday break? (Reference Q9)

- Overall, respondents are equally happy to take a UK holiday in spring, summer or autumn.
- The younger the respondent, the more they prefer to take a UK holiday in the summer (June to August).
- Autumn is the preferred holiday season for those aged 55+. September to November & March to May are more popular than summer for this age.



Q9: If you were to take a UK holiday/break, when is your preferred season? (All data by age)

Answered: 3,254 Skipped: 0



	NONE OF THE ABOVE	SPRING (MARCH TO MAY)	SUMMER (JUNE TO AUGUST)	AUTUMN (SEPTEMBER TO NOVEMBER)	WINTER (DECEMBER TO FEBRUARY)	NO PREFERENCE	TOTAL
Q2: Under 18	0.00% 0	8.70% 2	86.96% 20	4.35% 1	17.39% 4	0.00% 0	0.83% 27
Q2: 18-24	0.00% 0	32.50% 13	75.00% 30	17.50% 7	7.50% 3	17.50% 7	1.84% 60
Q2: 25-34	0.00% 0	47.74% 95	63.82% 127	31.16% 62	4.52% 9	15.58% 31	9.96% 324
Q2: 35-44	0.00% 0	43.86% 168	64.23% 246	29.50% 113	5.48% 21	20.37% 78	19.24% 626
Q2: 45-54	0.00% 0	42.68% 280	53.35% 350	40.70% 267	7.32% 48	21.19% 139	33.31% 1,084
Q2: 55-64	0.00% 0	46.40% 458	42.76% 422	50.86% 502	7.60% 75	24.72% 244	52.27% 1,701
Q2: 65+	0.00% 0	54.55% 527	40.48% 391	61.59% 595	6.94% 67	18.43% 178	54.03% 1,758
Total Respondents	0	1,543	1,586	1,547	227	677	3,254

What are people seeking from a UK holiday in 2021? (Reference Q10)

- People are overwhelmingly seeking rest and relaxation this year (73%). This is much higher than any other motivation across all age groups (aside from -18s).
- The next most popular motivation for a UK holiday in 2021 is enjoying family fun (26%) or visiting friends and family (23%).
- Attending an event, festival or theatre received a low score of just 13% overall.

Those aged under 45 years: rest and relaxation was the most popular motivation (63%) followed by family fun (52%).

Those over 45 years, rest and relaxation was by far the most popular motivation (76%) followed by visiting friends and family (22%).

Active or sporting breaks were most popular in the under 24 age group, whilst wellness and spa breaks were most popular among those aged 18 to 34.

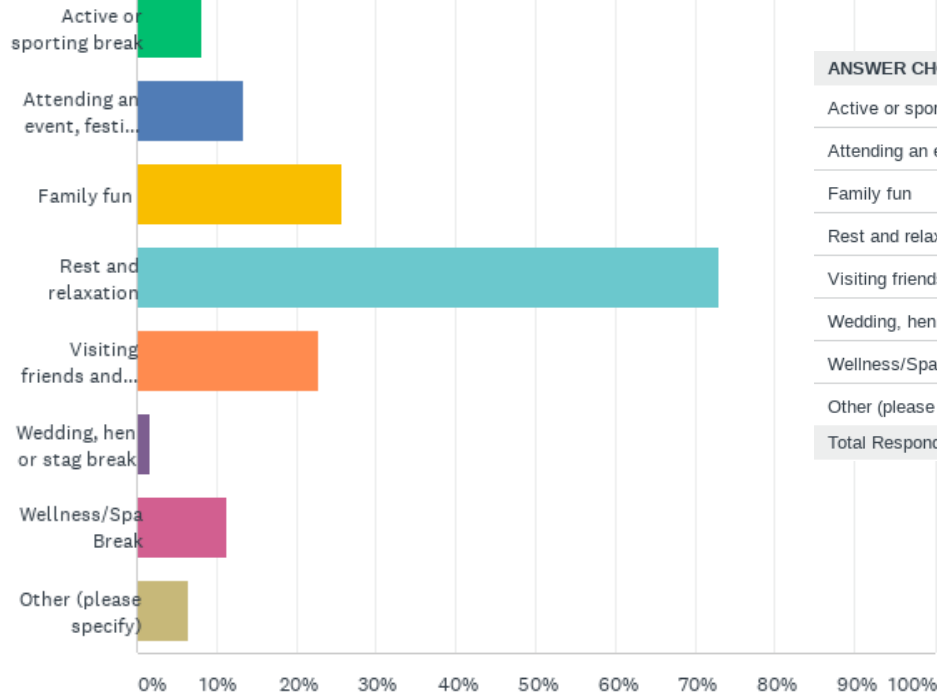
Having family fun was most popular in the under 18 and 35-44 age groups.

Visiting friends and family was most popular in the under 18 age group. Attending weddings, hen or stag breaks was most popular in the 25 to 34 age category.

➤ Insight Action – These motivations provide guidance for content marketing key messages which will have traction with target markets. The low scoring event, festival or theatre option should be explored further as it could have implications for Eastbourne's strong cultural offer post COVID. It might be these are more popular with locals or day-trippers.

Q10: If you are considering a UK holiday in 2021, what is your main motivation? (All data)

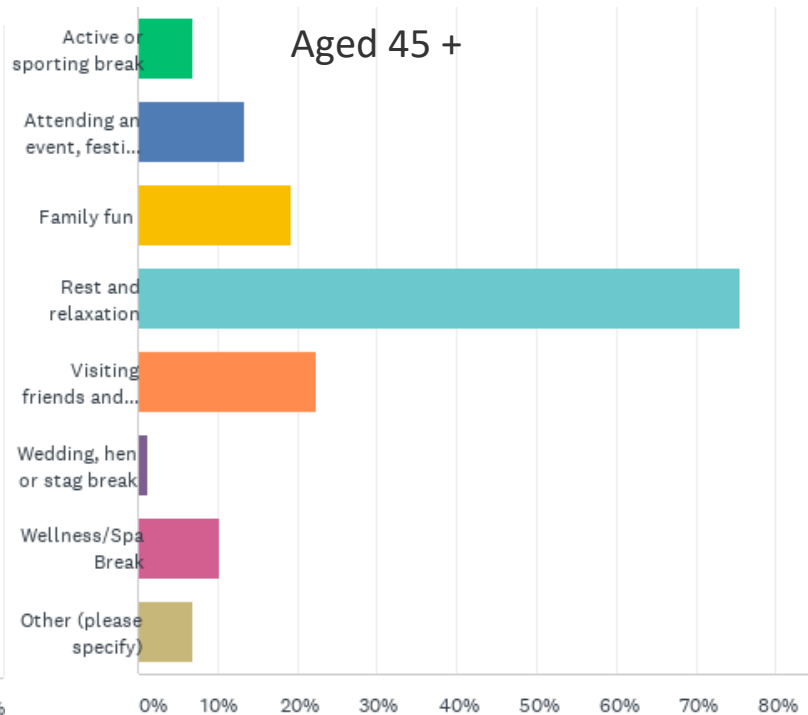
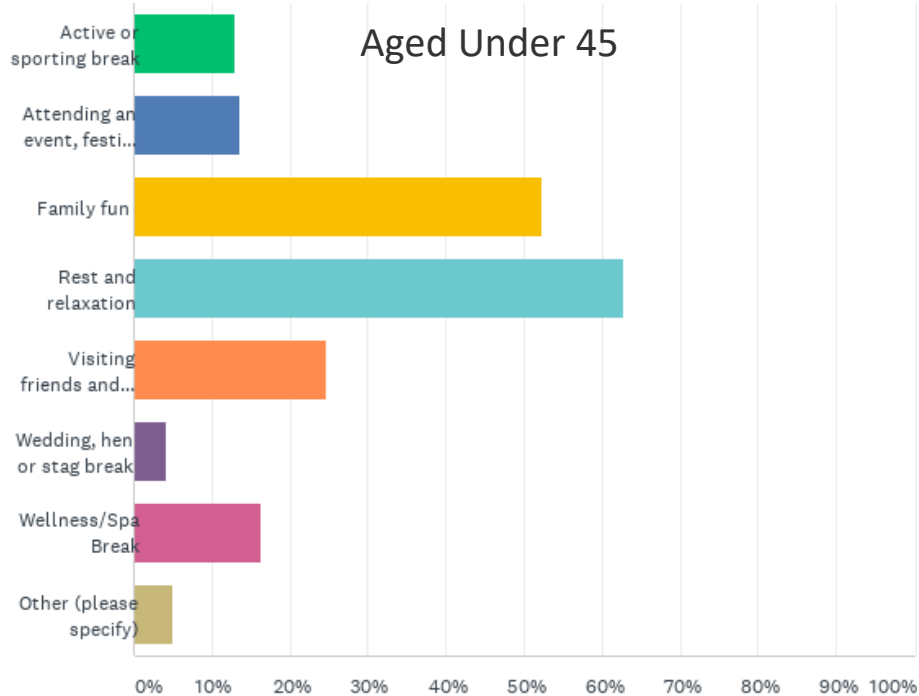
Answered: 3,206 Skipped: 48



ANSWER CHOICES	RESPONSES	
Active or sporting break	8.11%	260
Attending an event, festival or theatre	13.41%	430
Family fun	25.80%	827
Rest and relaxation	73.02%	2,341
Visiting friends and family	22.80%	731
Wedding, hen or stag break	1.78%	57
Wellness/Spa Break	11.38%	365
Other (please specify)	6.55%	210
Total Respondents: 3,206		

Q10: If you are considering a UK holiday in 2021, what is your main motivation? (All data by age)

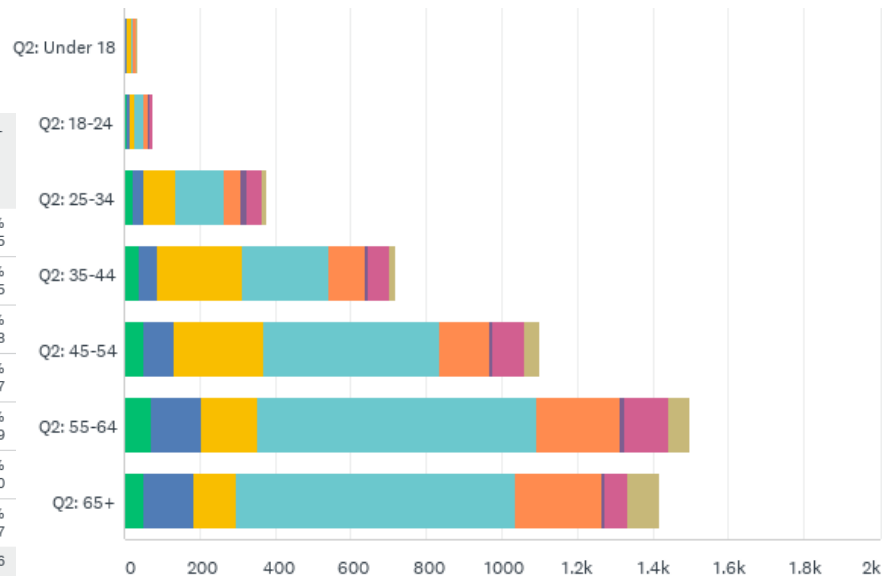
Answered: 3,206 Skipped: 48



Q10: If you are considering a UK holiday in 2021, what is your main motivation? (All data by age)

Answered: 3,206 Skipped: 48

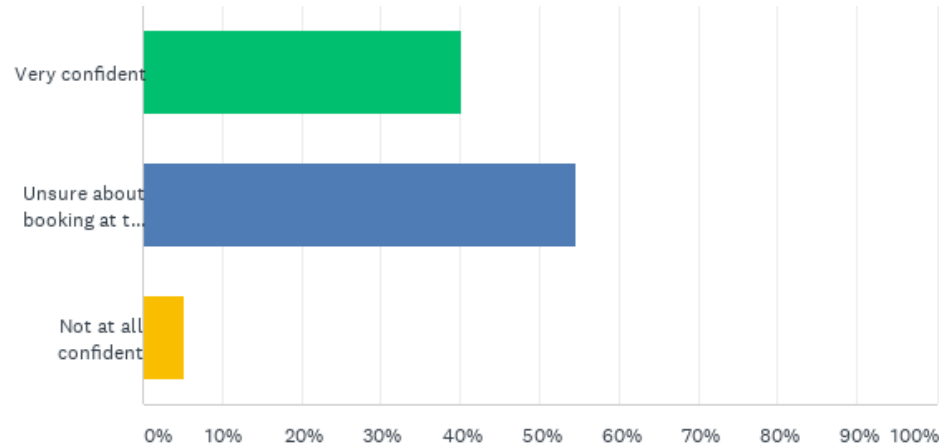
	ACTIVE OR SPORTING BREAK	ATTENDING AN EVENT, FESTIVAL OR THEATRE	FAMILY FUN	REST AND RELAXATION	VISITING FRIENDS AND FAMILY	WEDDING, HEN OR STAG BREAK	WELLNESS/SPA BREAK	OTHER (PLEASE SPECIFY)	TOTAL
Q2: Under 18	35.29% 6	11.76% 2	70.59% 12	35.29% 6	41.18% 7	0.00% 0	0.00% 0	11.76% 2	1.09% 35
Q2: 18-24	20.51% 8	17.95% 7	35.90% 14	64.10% 25	30.77% 12	2.56% 1	20.51% 8	0.00% 0	2.34% 75
Q2: 25-34	12.69% 25	14.72% 29	41.12% 81	67.01% 132	21.32% 42	7.61% 15	20.81% 41	6.60% 13	11.79% 378
Q2: 35-44	11.20% 42	12.80% 48	59.20% 222	61.60% 231	25.07% 94	2.67% 10	14.40% 54	4.27% 16	22.36% 717
Q2: 45-54	8.35% 54	12.36% 80	36.48% 236	72.18% 467	20.09% 130	1.24% 8	13.29% 86	5.87% 38	34.28% 1,099
Q2: 55-64	7.57% 74	13.29% 130	15.44% 151	75.56% 739	22.39% 219	1.43% 14	11.86% 116	5.83% 57	46.79% 1,500
Q2: 65+	5.35% 51	14.06% 134	11.65% 111	77.75% 741	23.82% 227	0.94% 9	6.30% 60	8.81% 84	44.20% 1,417
Total Respondents	260	430	827	2,341	731	57	365	210	3,206



■ Active or sporting break
 ■ Attending an event, festival or theatre
 ■ Family fun
 ■ Rest and relaxation
 ■ Visiting friends and family
 ■ Wedding, hen or stag break
 ■ Wellness/Spa Break
 ■ Other (please specify)

What are confidence levels about booking a UK holiday in 2021? (Reference Q1 1)

- The survey shows a split in relation to people's confidence about booking a UK holiday in 2021.
- More than 50% of respondents feel unsure about booking whilst 40% feel very confident.
- This polarity exists across all age groups.
- Those aged 25-34 score the most highly in the 'Not at all confident' category.

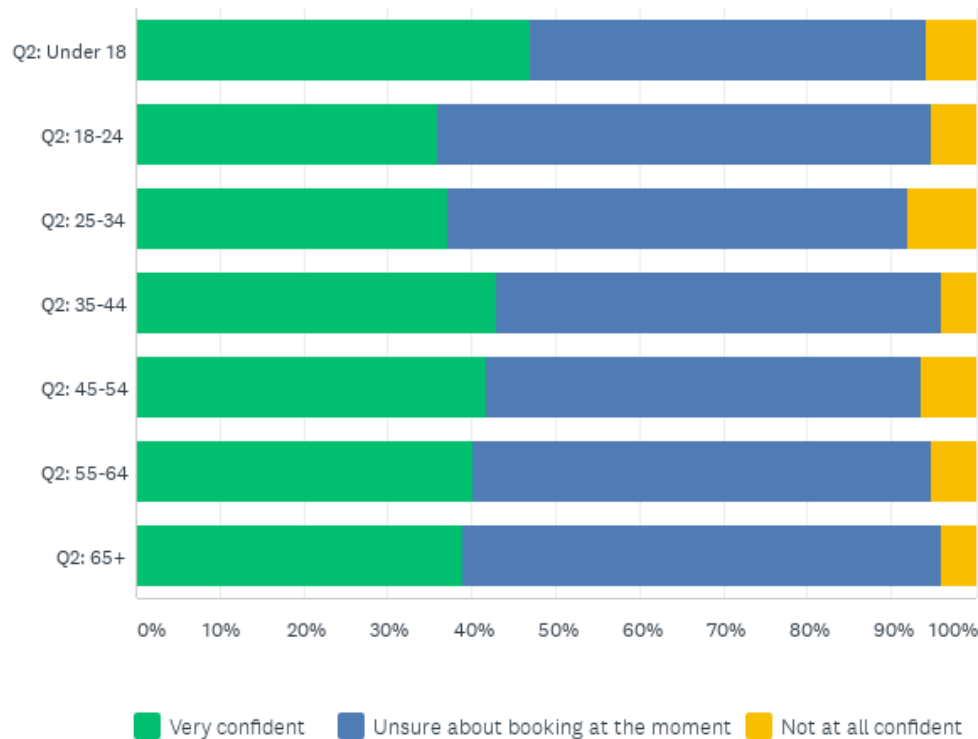


➤ **Insight:** These findings may be skewed by whether people have/haven't received a COVID-19 vaccine at the time of responding, and by those waiting to see if international travel will be opened-up for Summer 2021.

Q11: How confident do you feel about booking a UK holiday in 2021?

All data by age

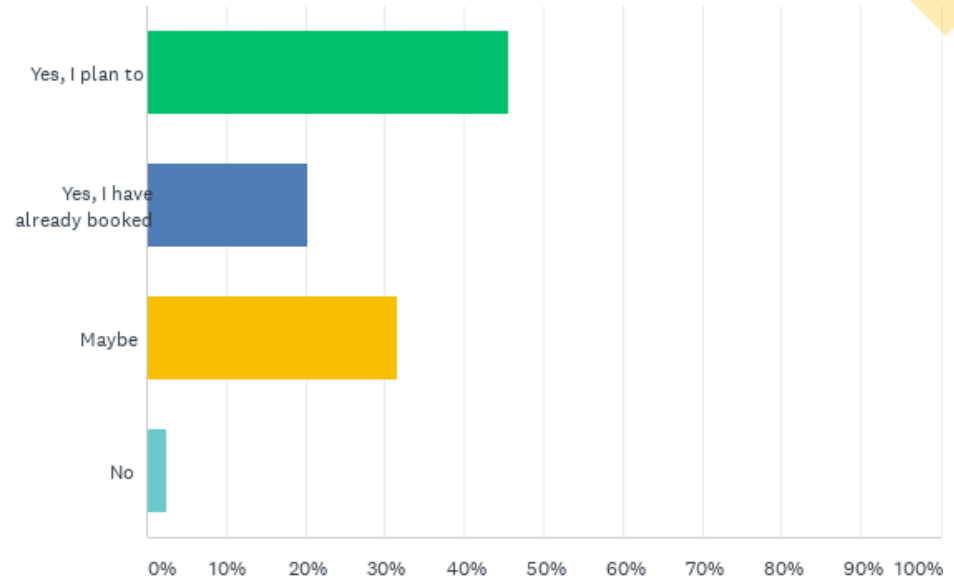
Answered: 3,206 Skipped: 48



	VERY CONFIDENT	UNSURE ABOUT BOOKING AT THE MOMENT	NOT AT ALL CONFIDENT	TOTAL
Q2: Under 18	47.06% 8	47.06% 8	5.88% 1	0.53% 17
Q2: 18-24	35.90% 14	58.97% 23	5.13% 2	1.22% 39
Q2: 25-34	37.06% 73	54.82% 108	8.12% 16	6.14% 197
Q2: 35-44	42.93% 161	53.07% 199	4.00% 15	11.70% 375
Q2: 45-54	41.73% 270	51.78% 335	6.49% 42	20.18% 647
Q2: 55-64	40.18% 393	54.50% 533	5.32% 52	30.51% 978
Q2: 65+	39.03% 372	56.87% 542	4.09% 39	29.73% 953
Total Respondents	1,291	1,748	167	3,206

Who is planning to book a UK holiday break in 2021? (Reference Q12)

- Overall, the majority of respondents plan to book a UK holiday break in 2021 (46%).
- A further 32% state they may book a UK break this year.
- 20% of respondents have already done so.
- Only 3% of respondents are not planning a UK break in 2021.
- These trends are consistent across all age groups.



➤ **Insight:** This shows opportunity to grow the East Sussex tourism market and capitalise on 'staycation' trends if timely place marketing is implemented.

What are the most important things when booking a UK holiday? (Reference Q13)

The following factors are deemed **Important or Highly Important** by respondents as a whole:

- **Destination cleanliness and accessible facilities - 92%**
- **Quality of accommodation that is COVID-19 secure - 87%**
- **Food and drink options** e.g., country pubs, coastal restaurants, bars, cafes and alfresco dining - **82%**
- **Space for social distancing - 74%**. (Particularly important to all age groups except 18-24 age.)
- **Outdoor amenities** eg. picnic or barbecue areas, playgrounds, gardens, parks and beaches - **65%**.

These factors scored relatively low on the 'important or very important scale overall:

Daytime family attractions and events - 38%. (31% ranked it as unimportant, but it is more favoured by those aged 25-44.)

Memorable experiences to learn something new - 27% (38% ranked this as unimportant, although this was ranked more important by those aged under 34.)

Nightlife & evening entertainment facilities - 25% (45% ranked this as unimportant, although it was ranked as more important by those aged 24 and under.)

➤ **Insight:** This data provides clear themes for marketing key messages, content and storytelling

Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.) All data

Answered: 3,146 Skipped: 108

	1	2	3	4	5	TOTAL
Destination cleanliness and accessible facilities	2.71% 85	1.18% 37	4.34% 136	20.82% 653	70.95% 2,225	3,136
Daytime family attractions and events	15.75% 483	15.65% 480	30.52% 936	22.46% 689	15.62% 479	3,067
Food and drink options eg. country pubs, coastal restaurants, bars & cafes, alfresco dining	2.37% 74	3.37% 105	12.66% 395	33.97% 1,060	47.63% 1,486	3,120
Memorable or 'trendy' experiences to learn something new	15.02% 462	22.53% 693	35.21% 1,083	19.77% 608	7.48% 230	3,076
Nightlife and evening entertainment facilities	23.42% 721	22.35% 688	29.56% 910	16.11% 496	8.54% 263	3,078
Outdoor amenities eg. picnic or BBQ areas, playgrounds, gardens, parks, beaches	3.57% 111	7.50% 233	23.57% 732	35.09% 1,090	30.26% 940	3,106
Space for social distancing	4.64% 143	4.61% 142	16.84% 519	27.90% 860	46.01% 1,418	3,082
Quality of accommodation which is Covid secure	4.14% 129	1.99% 62	6.38% 199	18.25% 569	69.23% 2,158	3,117

Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.) **Under age 45**

Answered: 617

	1	2	3	4	5	TOTAL
Destination cleanliness and accessible facilities	2.12% 13	1.47% 9	5.37% 33	24.59% 151	66.45% 408	614
Daytime family attractions and events	10.60% 65	9.46% 58	24.63% 151	28.55% 175	26.75% 164	613
Food and drink options eg. country pubs, coastal restaurants, bars & cafes, alfresco dining	1.46% 9	4.07% 25	13.50% 83	37.89% 233	43.09% 265	615
Memorable or 'trendy' experiences to learn something new	10.11% 62	20.72% 127	32.46% 199	27.57% 169	9.14% 56	613
Nightlife and evening entertainment facilities	21.34% 131	20.85% 128	31.60% 194	17.26% 106	8.96% 55	614
Outdoor amenities eg. picnic or BBQ areas, playgrounds, gardens, parks, beaches	2.61% 16	2.45% 15	19.44% 119	37.09% 227	38.40% 235	612
Space for social distancing	7.33% 45	6.35% 39	18.73% 115	30.78% 189	36.81% 226	614
Quality of accommodation which is Covid secure	5.05% 31	4.72% 29	10.59% 65	22.64% 139	57.00% 350	614

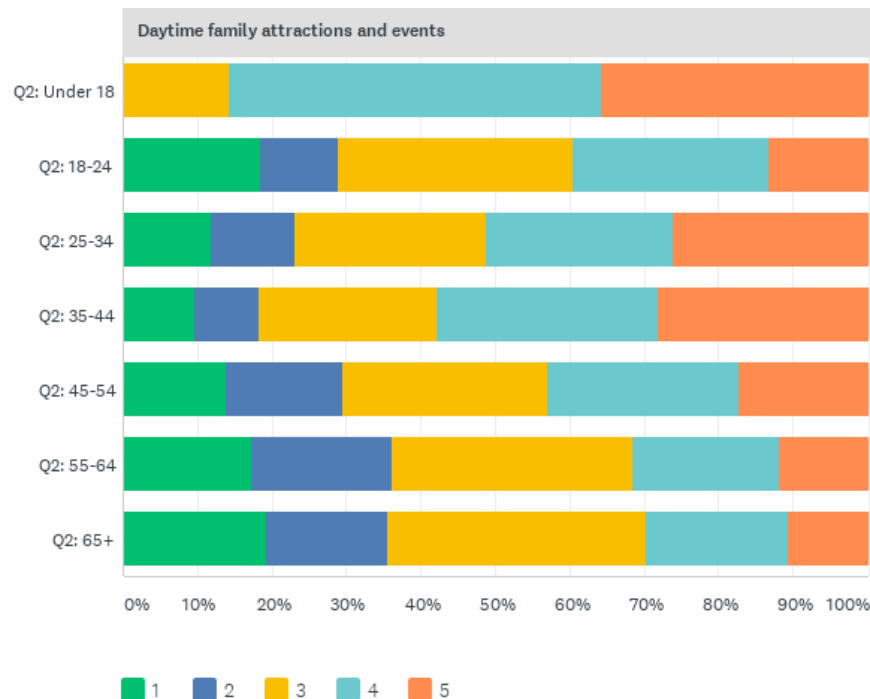
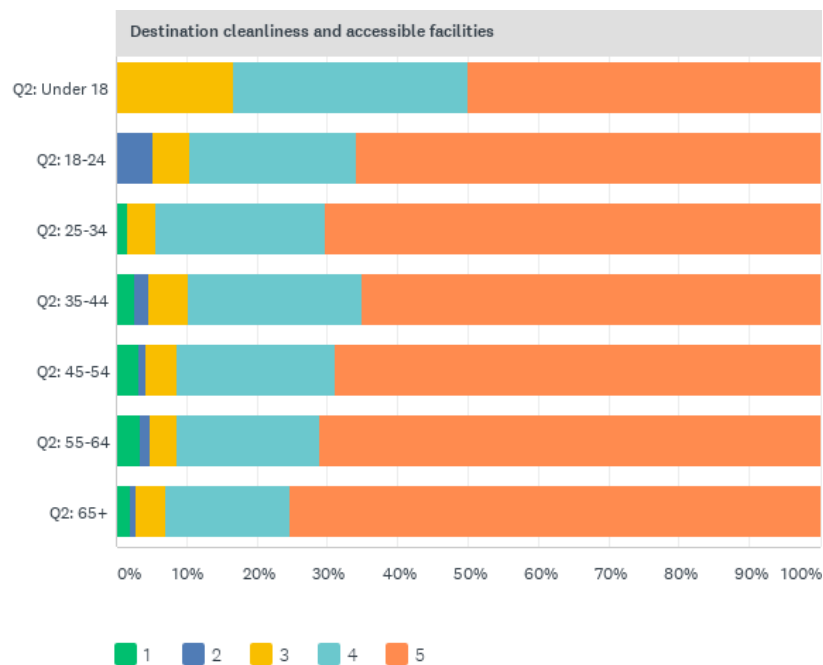
Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.) **Age 45 +**

Answered: 2,529

	1	2	3	4	5	TOTAL
Destination cleanliness and accessible facilities	2.85% 72	1.11% 28	4.08% 103	19.90% 502	72.05% 1,817	2,522
Daytime family attractions and events	17.03% 418	17.20% 422	31.99% 785	20.95% 514	12.84% 315	2,454
Food and drink options eg. country pubs, coastal restaurants, bars & cafes, alfresco dining	2.59% 65	3.19% 80	12.46% 312	33.01% 827	48.74% 1,221	2,505
Memorable or 'trendy' experiences to learn something new	16.24% 400	22.98% 566	35.89% 884	17.82% 439	7.06% 174	2,463
Nightlife and evening entertainment facilities	23.94% 590	22.73% 560	29.06% 716	15.83% 390	8.44% 208	2,464
Outdoor amenities eg. picnic or BBQ areas, playgrounds, gardens, parks, beaches	3.81% 95	8.74% 218	24.58% 613	34.60% 863	28.27% 705	2,494
Space for social distancing	3.97% 98	4.17% 103	16.37% 404	27.19% 671	48.30% 1,192	2,468
Quality of accommodation which is Covid secure	3.92% 98	1.32% 33	5.35% 134	17.18% 430	72.23% 1,808	2,503

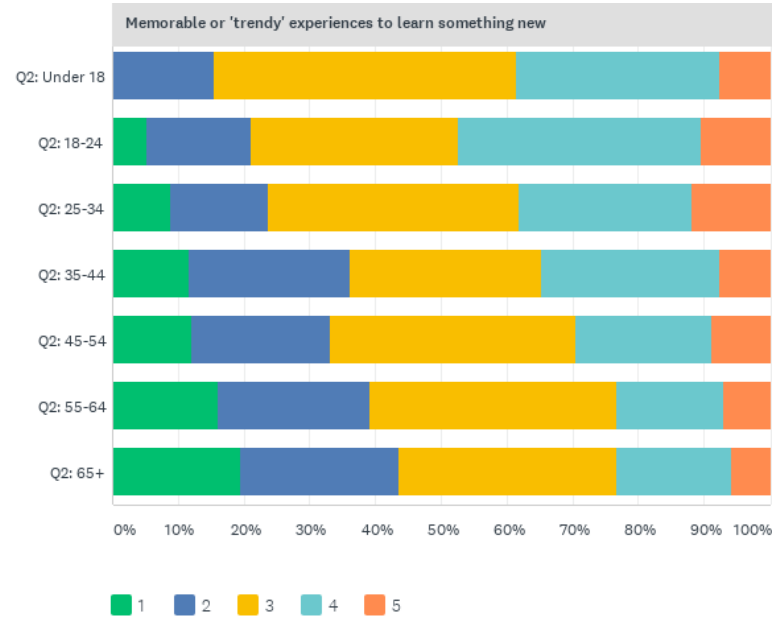
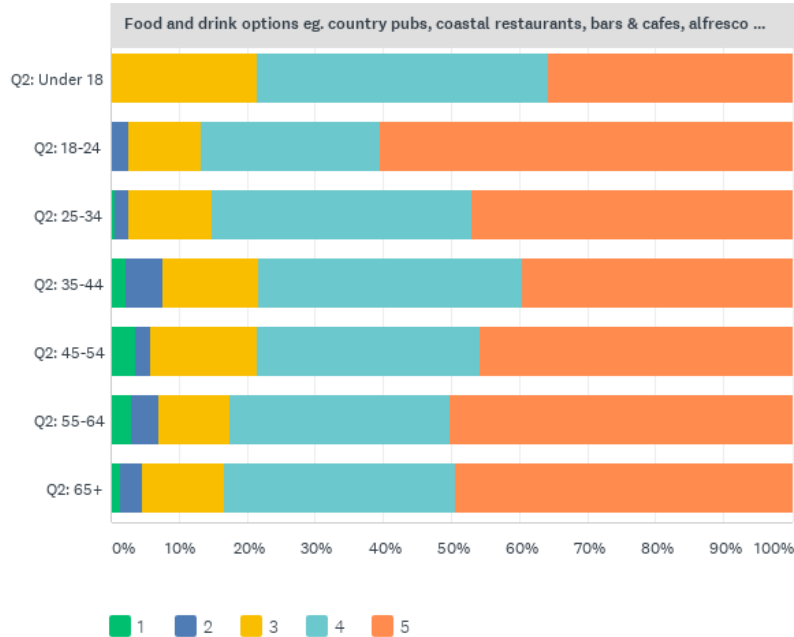
Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.)

Answered: 3,146 Skipped: 108



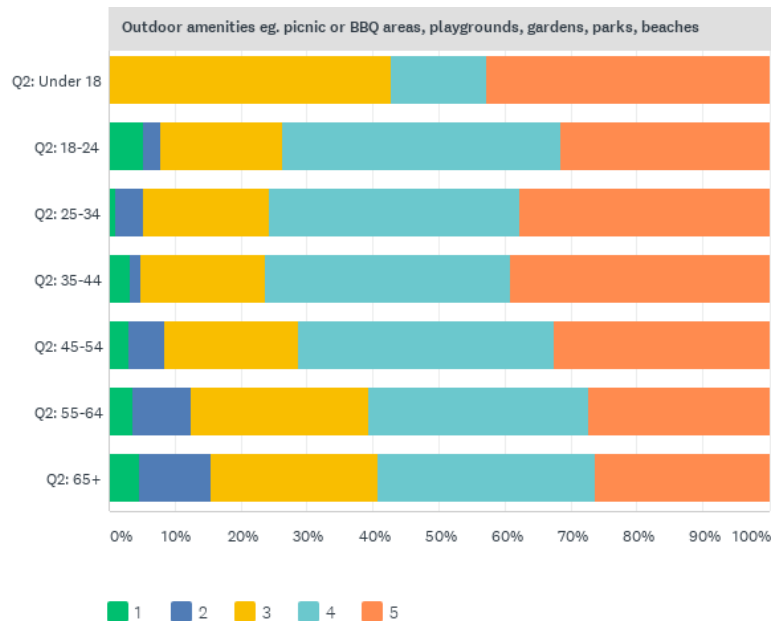
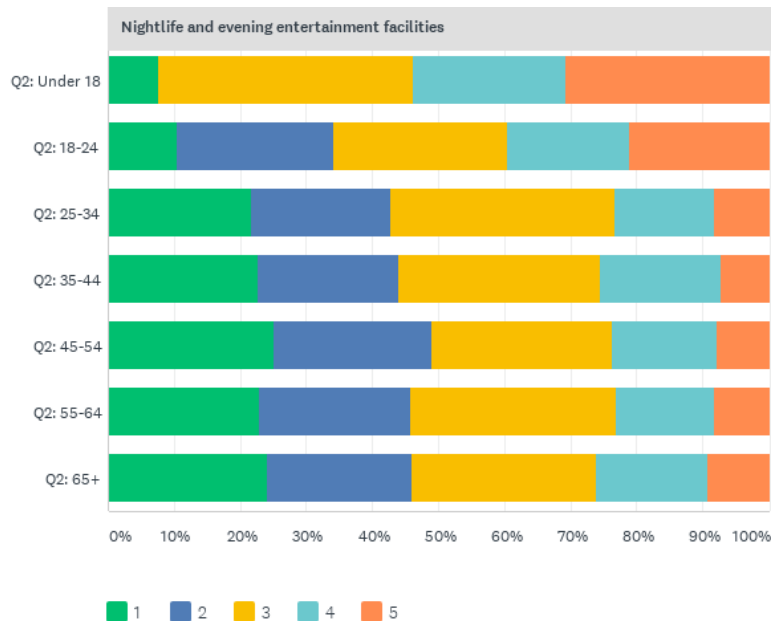
Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.)

Answered: 3,146 Skipped: 108



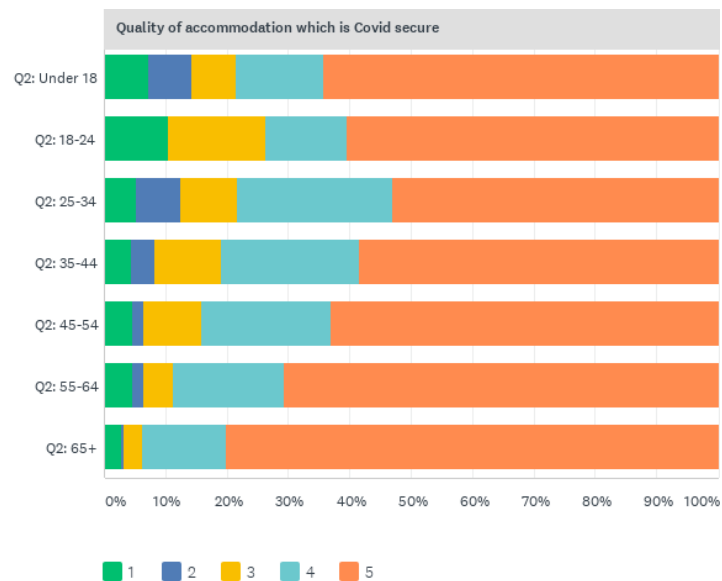
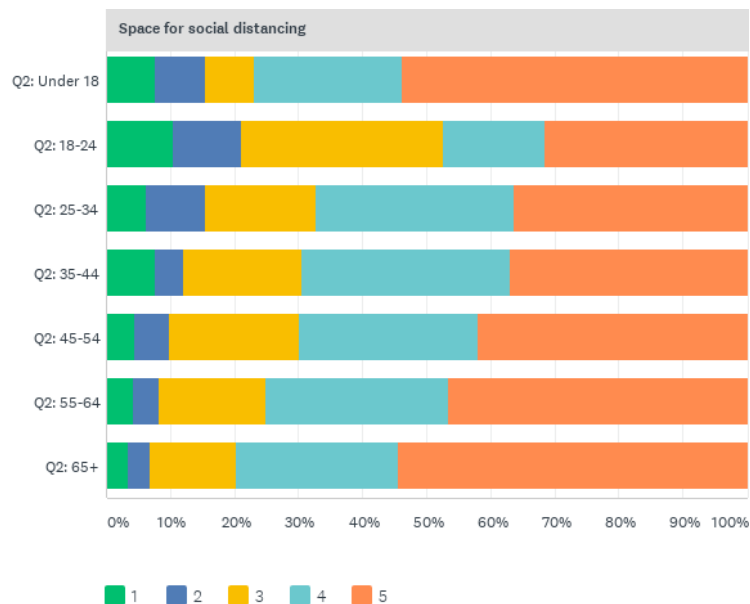
Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.)

Answered: 3,146 Skipped: 108



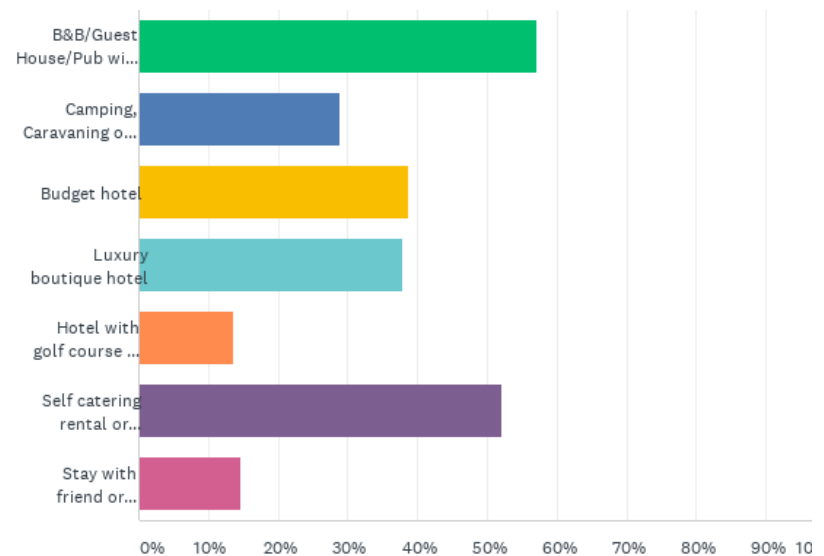
Q13: How important are each of these elements to you when booking a UK holiday/break? (where 1 is unimportant and 5 is very important.)

Answered: 3,146 Skipped: 108



What type of accommodation or people most likely to book for a UK holiday break? (Reference Q14)

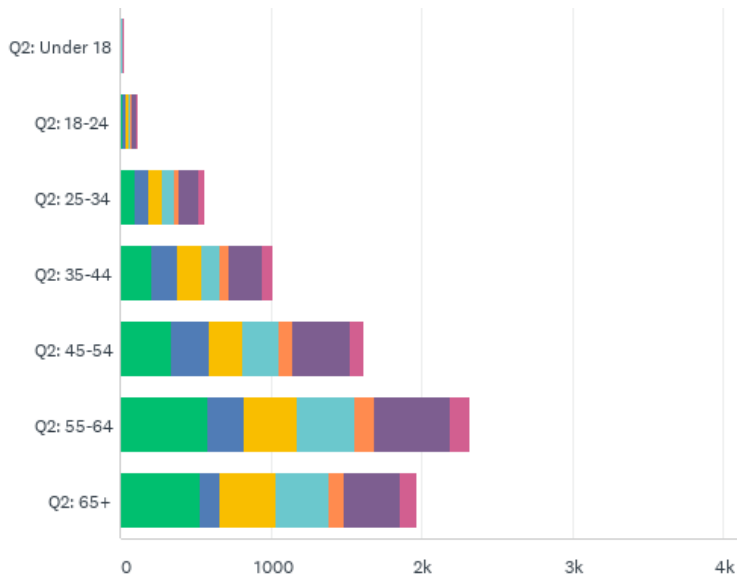
- 91% of respondents are likely to book a Hotel. This can be broken down as: budget hotels (39%); luxury boutique hotels (38%) hotels with golf course/spa (14%).
- 57% of respondents are likely to book B&B, Guest house or pub with rooms accommodation. (This was ranked highest in the 55-64 age categories.)
- 52% are likely to book Self-catering Rentals or Airbnb. (The most popular choice among those aged 18-54.)
- 29% favoured Camping, caravans or glamping.



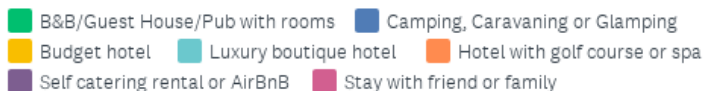
➤ Note: Respondents could select more than one option.

Q14: What type of accommodation would you be likely to book? (Tick all that apply.) All data by age

Answered: 3,146 Skipped: 108



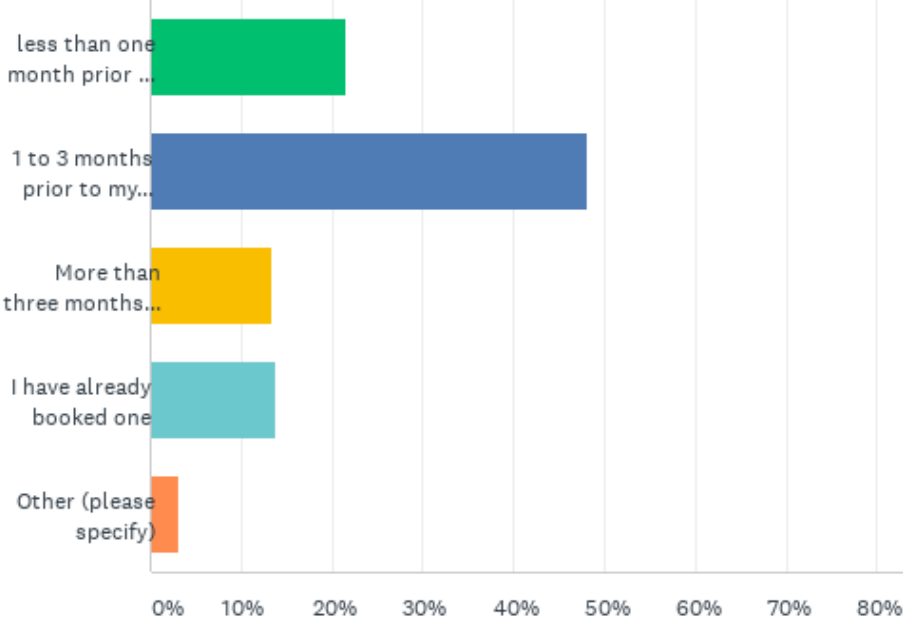
	B&B/GUEST HOUSE/PUB WITH ROOMS	CAMPING, CARAVANING OR GLAMPING	BUDGET HOTEL	LUXURY BOUTIQUE HOTEL	HOTEL WITH GOLF COURSE OR SPA	SELF CATERING RENTAL OR AIRBNB	STAY WITH FRIEND OR FAMILY	TOTAL
Q2: Under 18	26.67% 4	26.67% 4	20.00% 3	46.67% 7	6.67% 1	20.00% 3	60.00% 9	0.99% 31
Q2: 18-24	57.89% 22	44.74% 17	50.00% 19	39.47% 15	31.58% 12	73.68% 28	26.32% 10	3.91% 123
Q2: 25-34	53.33% 104	46.15% 90	47.18% 92	38.97% 76	16.92% 33	64.10% 125	20.00% 39	17.77% 559
Q2: 35-44	56.10% 207	47.97% 177	41.73% 154	34.42% 127	14.91% 55	61.25% 226	19.51% 72	32.36% 1,018
Q2: 45-54	53.45% 341	38.87% 248	35.11% 224	38.09% 243	14.42% 92	58.62% 374	14.11% 90	51.24% 1,612
Q2: 55-64	61.40% 587	24.90% 238	36.19% 346	39.85% 381	13.91% 133	52.51% 502	13.70% 131	73.68% 2,318
Q2: 65+	56.68% 530	14.12% 132	40.32% 377	36.79% 344	10.70% 100	40.43% 378	11.44% 107	62.56% 1,968
Total Respondents	1,795	906	1,215	1,193	426	1,636	458	3,146



When do people decide to book their next UK holiday break?

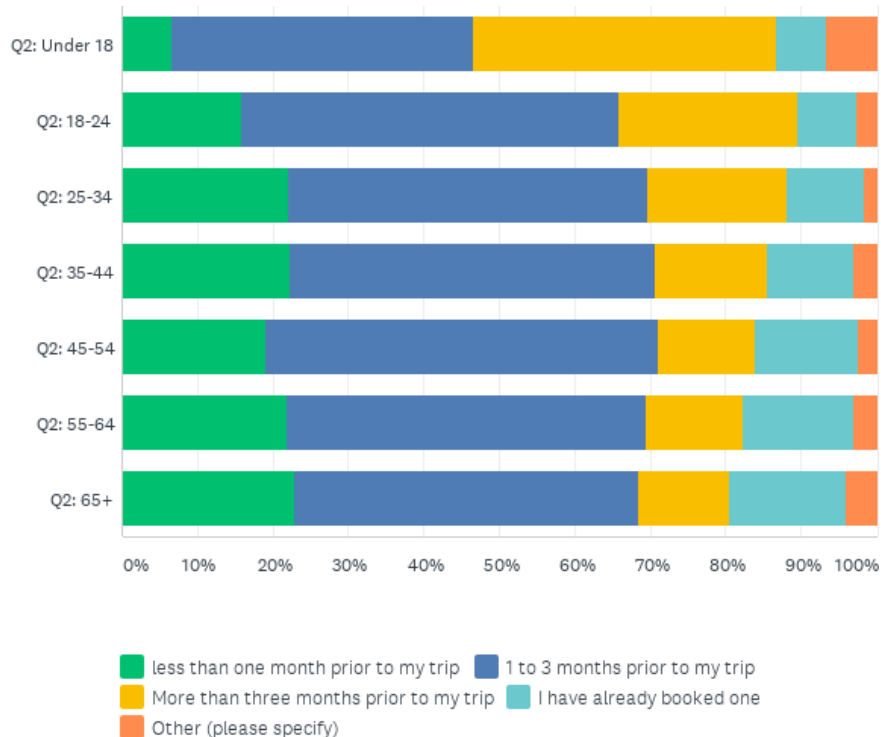
(Reference Q15)

- People of all ages are most likely to book their UK break within 1-3 months of travelling (48%)
- 22% will book within one month of travelling – again consistent across all age groups.
- Younger people aged under 34 are more likely to book their UK trips more than 3 months ahead.



Q15: When will you decide to book your next UK holiday/break? All data by age

Answered: 3,146 Skipped: 108

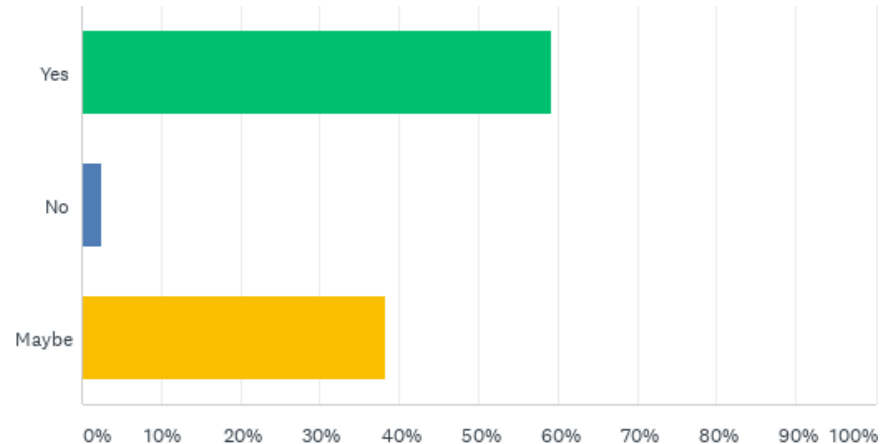


	LESS THAN ONE MONTH PRIOR TO MY TRIP	1 TO 3 MONTHS PRIOR TO MY TRIP	MORE THAN THREE MONTHS PRIOR TO MY TRIP	I HAVE ALREADY BOOKED ONE	OTHER (PLEASE SPECIFY)	TOTAL
Q2: Under 18	6.67% 1	40.00% 6	40.00% 6	6.67% 1	6.67% 1	0.48% 15
Q2: 18-24	15.79% 6	50.00% 19	23.68% 9	7.89% 3	2.63% 1	1.21% 38
Q2: 25-34	22.05% 43	47.69% 93	18.46% 36	10.26% 20	1.54% 3	6.20% 195
Q2: 35-44	22.22% 82	48.51% 179	14.91% 55	11.38% 42	2.98% 11	11.73% 369
Q2: 45-54	19.12% 122	51.88% 331	13.01% 83	13.48% 86	2.51% 16	20.28% 638
Q2: 55-64	21.86% 209	47.70% 456	12.76% 122	14.64% 140	3.03% 29	30.39% 956
Q2: 65+	22.89% 214	45.67% 427	11.87% 111	15.51% 145	4.06% 38	29.72% 935
Total Respondents	677	1,511	422	437	99	3,146

Are you planning to visit East Sussex during 2021? (Reference Q16)

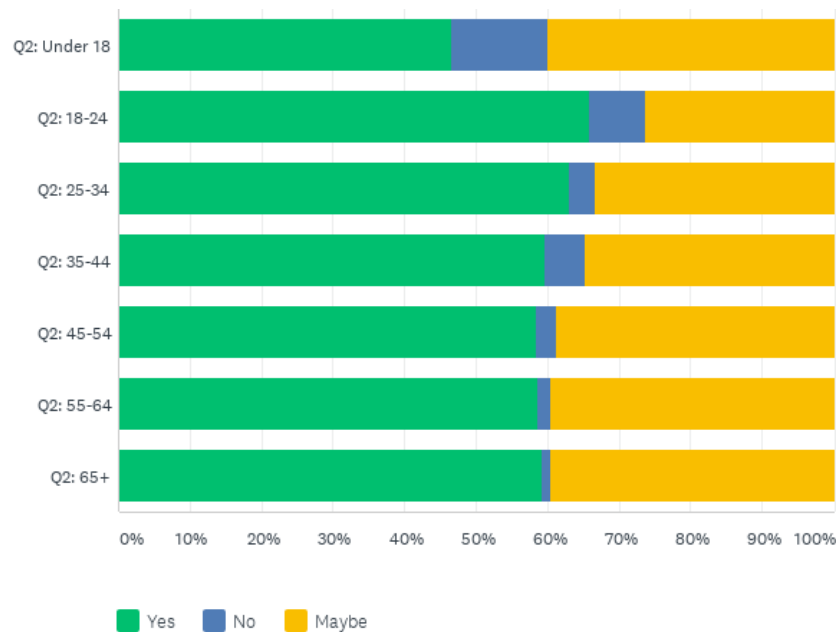
The data is consistent across all age groups and reveals:

- 59% of respondents are likely to visit East Sussex this year.
- 38% of respondents may visit East Sussex this year.
- Only 2.5% do not plan to visit East Sussex in 2021.



Q16: Are you planning to visit East Sussex during 2021 – All data by age

Answered: 3,146 Skipped: 108



	YES	NO	MAYBE	TOTAL
Q2: Under 18	46.67% 7	13.33% 2	40.00% 6	0.48% 15
Q2: 18-24	65.79% 25	7.89% 3	26.32% 10	1.21% 38
Q2: 25-34	63.08% 123	3.59% 7	33.33% 65	6.20% 195
Q2: 35-44	59.62% 220	5.69% 21	34.69% 128	11.73% 369
Q2: 45-54	58.46% 373	2.82% 18	38.71% 247	20.28% 638
Q2: 55-64	58.68% 561	1.67% 16	39.64% 379	30.39% 956
Q2: 65+	59.14% 553	1.28% 12	39.57% 370	29.72% 935
Total Respondents	1,862	79	1,205	3,146

What are people's perceptions about East Sussex as a destination for a UK holiday? (Reference Q17)

55% agree East Sussex would be in their top three places to visit for a UK holiday.

50% agree that East Sussex is a cool place to go for lots of great experiences. This rises to 66% within the 18 to 24 age group!

Only 19% believe East Sussex is a UK holiday destination best suited to older visitors. This rises to 37% within the 18 to 24 age group.

62% agree that East Sussex has lots to offer families seeking a UK holiday. This rises to 73% in the 35 to 44 age group.

86% believe East Sussex is a great place to go and enjoy the great outdoors. This statement has the lowest 'Neither agree nor Disagree' score, indicating clarity of belief across all ages.

80% would recommend East Sussex as a location to visit. This is marginally lower in the age 25 to 34 age group which scored 74% and under 18s.

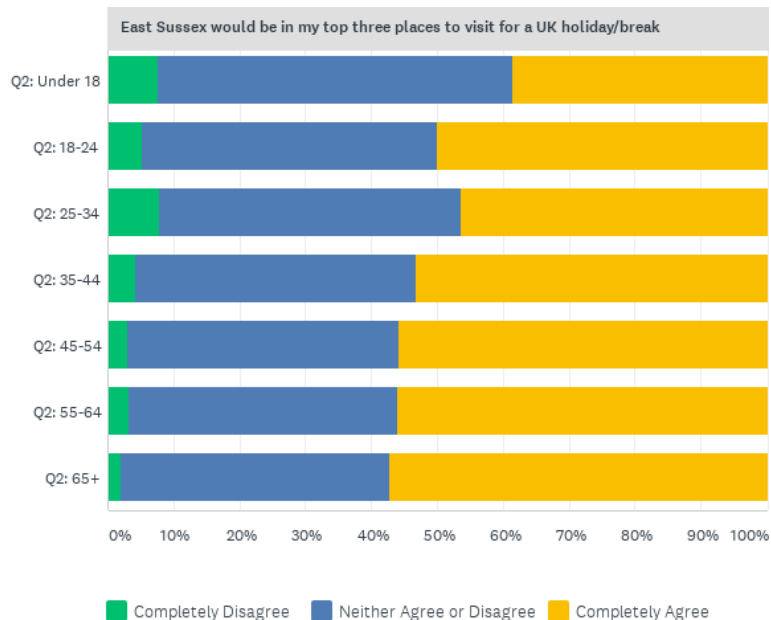
12% agree that they have no perception of what East Sussex offers as a holiday destination. This rises to 21% in the 25 to 34 age group, and 16% for those aged 35 to 44.

- **Action Insight:** These findings may lead one to consider that more work is required to clarify the East Sussex destination brand in the minds of consumers. Further research could explore this in more detail.

Q17: Below are some statements which refer specifically to East Sussex. For each statement, please indicate to what extent you agree or disagree. – All data

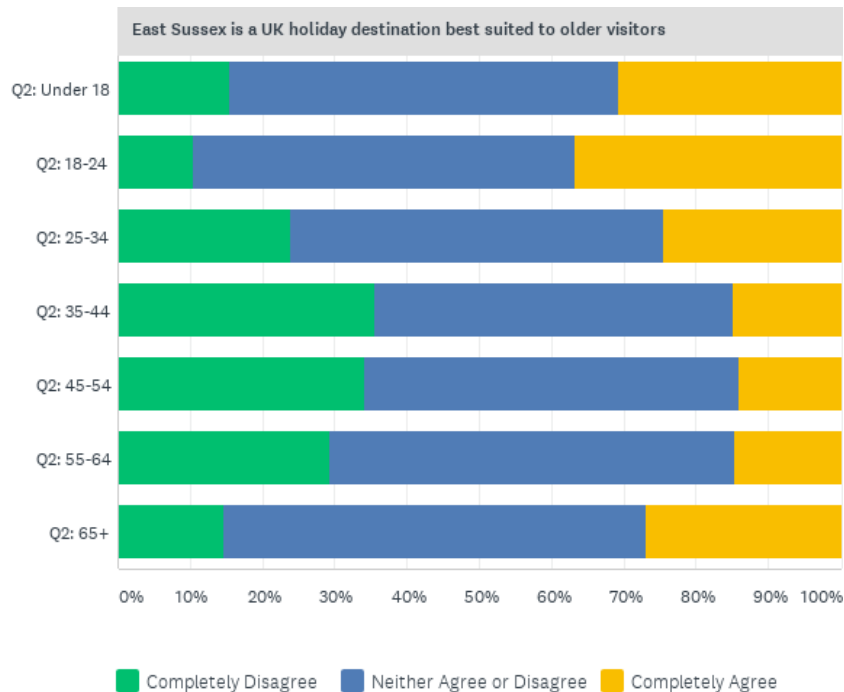
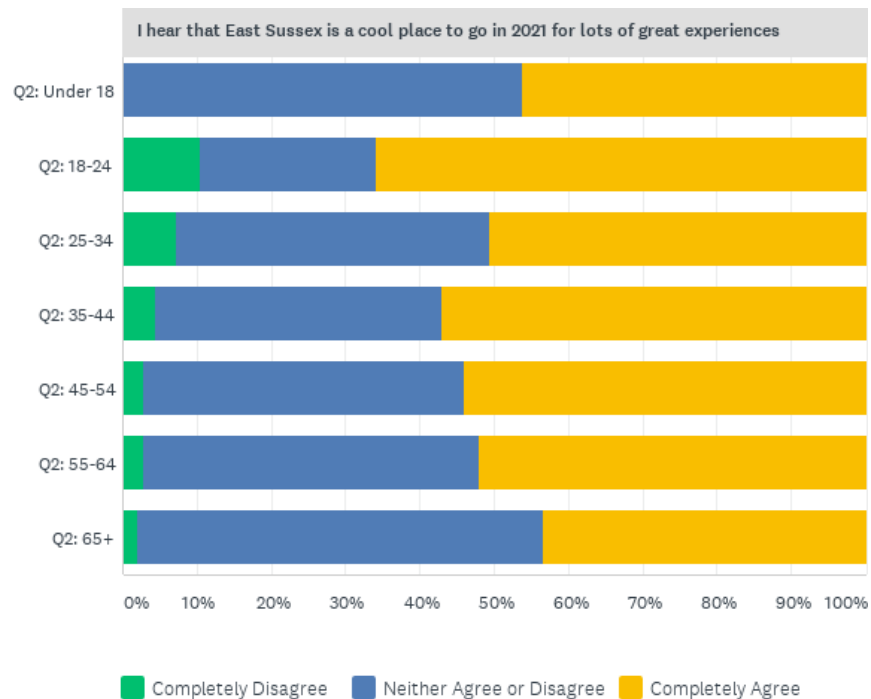
Answered: 3,091 Skipped: 163

	COMPLETELY DISAGREE	NEITHER AGREE OR DISAGREE	COMPLETELY AGREE	TOTAL
East Sussex would be in my top three places to visit for a UK holiday/break	3.27% 101	41.50% 1,280	55.22% 1,703	3,084
I hear that East Sussex is a cool place to go in 2021 for lots of great experiences	3.19% 98	46.32% 1,422	50.49% 1,550	3,070
East Sussex is a UK holiday destination best suited to older visitors	26.06% 800	54.79% 1,682	19.15% 588	3,070
East Sussex has lots to offer families seeking a UK holiday	1.69% 52	36.35% 1,116	61.95% 1,902	3,070
East Sussex is a great place to go and enjoy the great outdoors	1.04% 32	12.72% 392	86.24% 2,658	3,082
I would recommend East Sussex as a location to visit	1.44% 44	18.86% 577	79.71% 2,439	3,060
I have no perception of what East Sussex offers as a holiday destination	59.75% 1,829	28.32% 867	11.92% 365	3,061



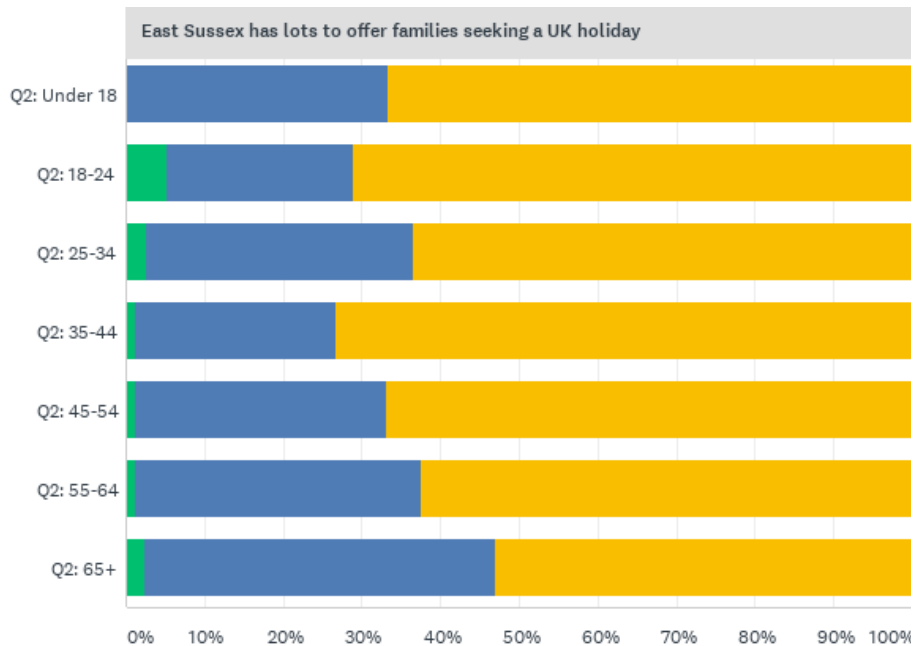
Q17: Below are some statements which refer specifically to East Sussex. For each statement, please indicate to what extent you agree or disagree. All data by Age

Answered: 3,091 Skipped: 163

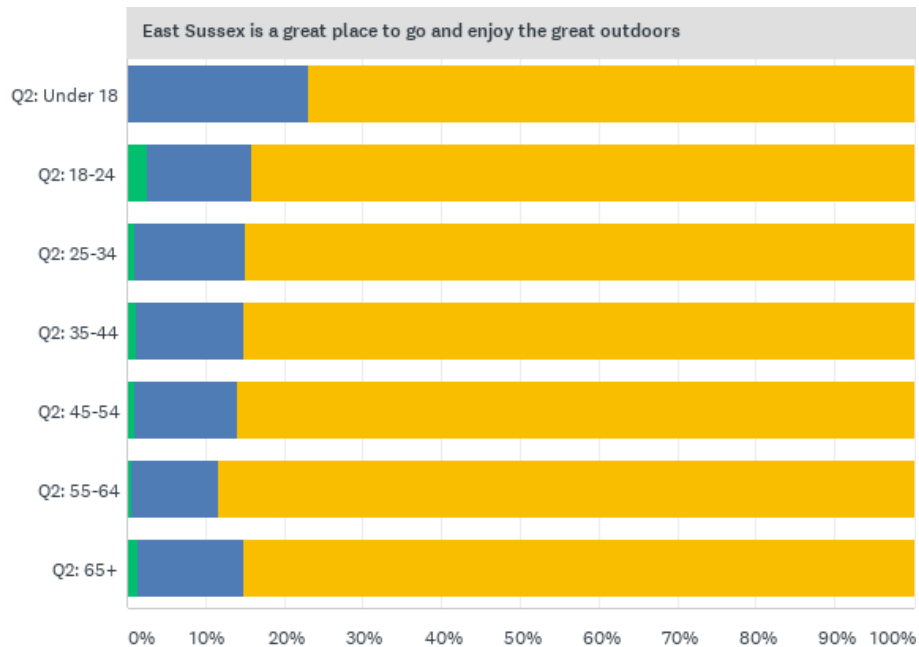


Q17: Below are some statements which refer specifically to East Sussex. For each statement, please indicate to what extent you agree or disagree. All data by Age

Answered: 3,091 Skipped: 163



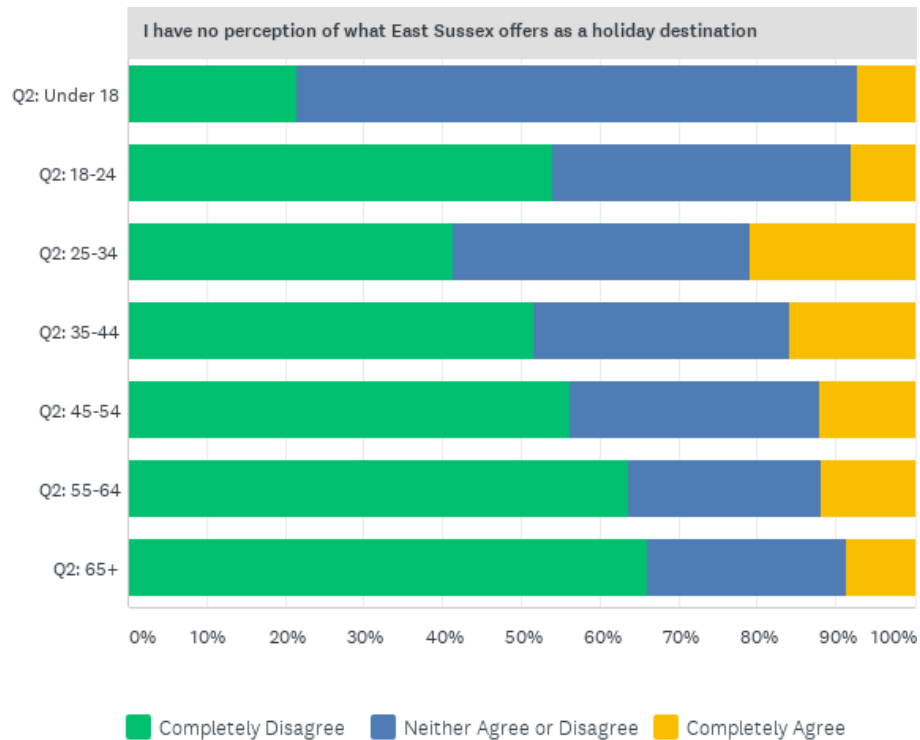
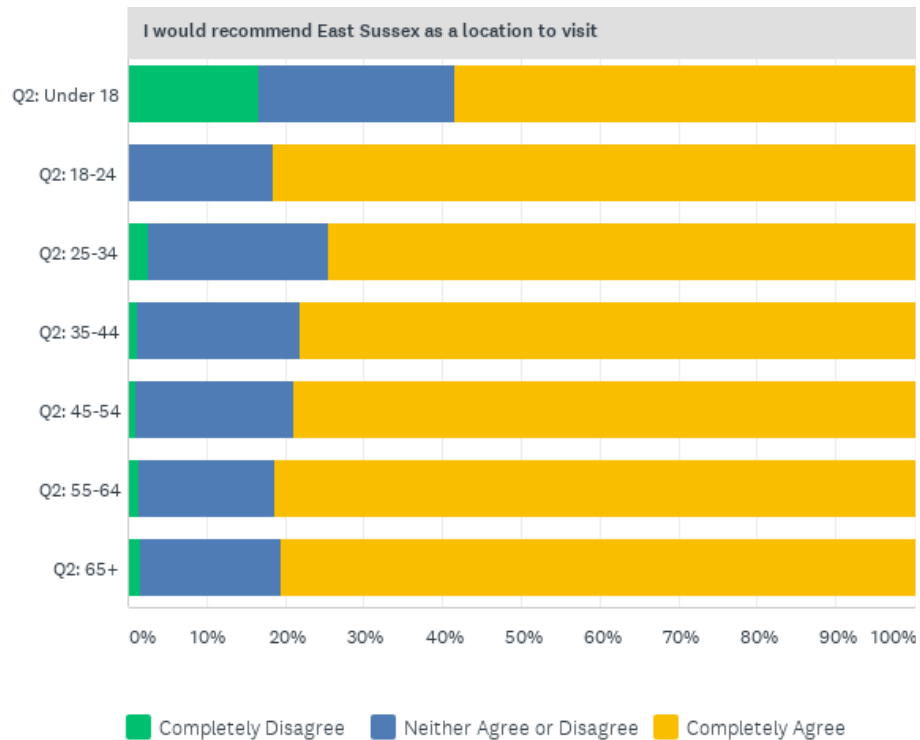
Completely Disagree Neither Agree or Disagree Completely Agree



Completely Disagree Neither Agree or Disagree Completely Agree

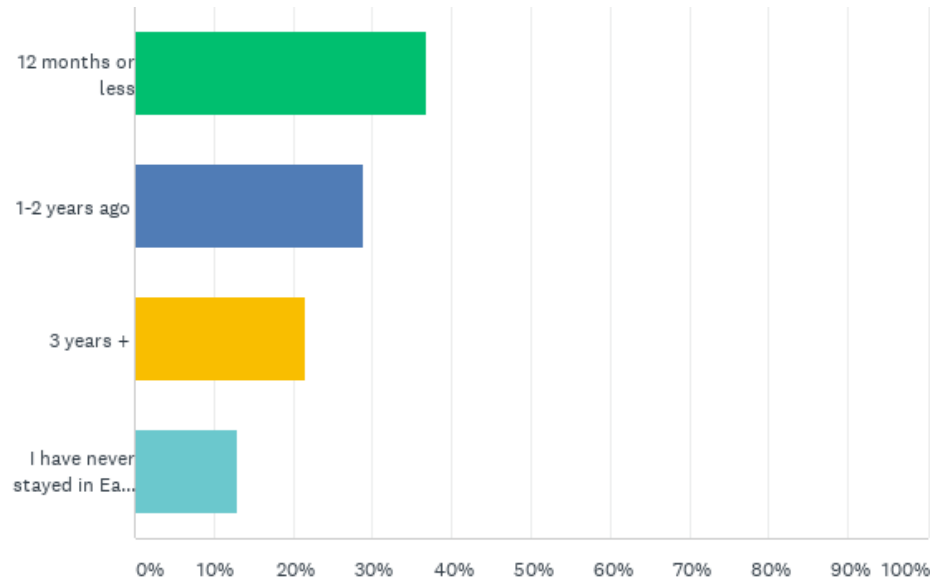
Q17: Below are some statements which refer specifically to East Sussex. For each statement, please indicate to what extent you agree or disagree. All data by Age

Answered: 3,091 Skipped: 163



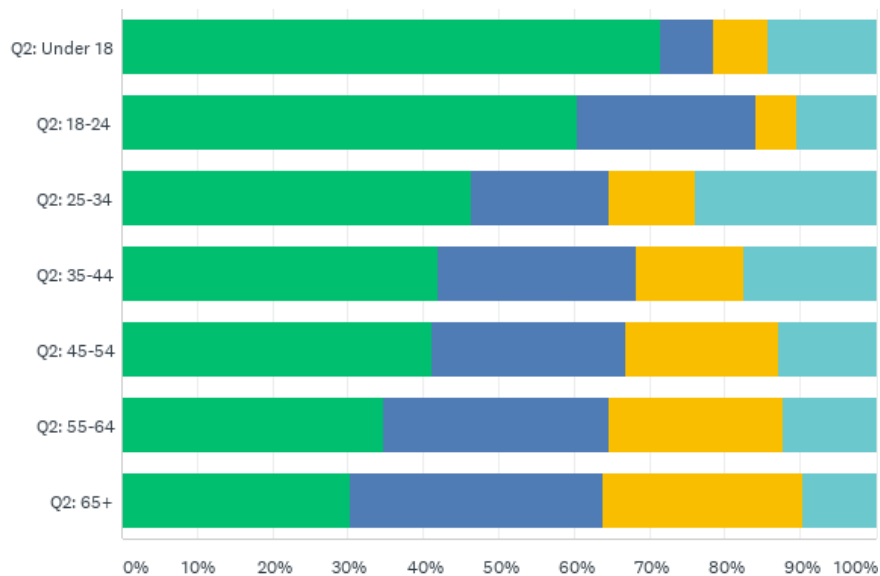
When was the last time people stayed in East Sussex? (Reference Q18)

- 37% of all respondents have stayed in East Sussex in the last 12 months.
- 29% last visited 1-2 years ago
- 21.5% have not visited for 3+ years
- 13% of respondents have never stayed in East Sussex!



Q18: When was the last time you stayed in East Sussex? All data by age

Answered: 3,091 Skipped: 163



■ 12 months or less
 ■ 1-2 years ago
 ■ 3 years +
 ■ I have never stayed in East Sussex

	12 MONTHS OR LESS	1-2 YEARS AGO	3 YEARS +	I HAVE NEVER STAYED IN EAST SUSSEX	TOTAL
Q2: Under 18	71.43% 10	7.14% 1	7.14% 1	14.29% 2	0.45% 14
Q2: 18-24	60.53% 23	23.68% 9	5.26% 2	10.53% 4	1.23% 38
Q2: 25-34	46.35% 89	18.23% 35	11.46% 22	23.96% 46	6.21% 192
Q2: 35-44	42.06% 151	26.18% 94	14.21% 51	17.55% 63	11.61% 359
Q2: 45-54	41.25% 257	25.52% 159	20.39% 127	12.84% 80	20.16% 623
Q2: 55-64	34.64% 327	29.98% 283	23.20% 219	12.18% 115	30.54% 944
Q2: 65+	30.29% 279	33.55% 309	26.49% 244	9.66% 89	29.80% 921
Total Respondents	1,136	890	666	399	3,091

Where did people stay when they last visited East Sussex? (Reference Q19)

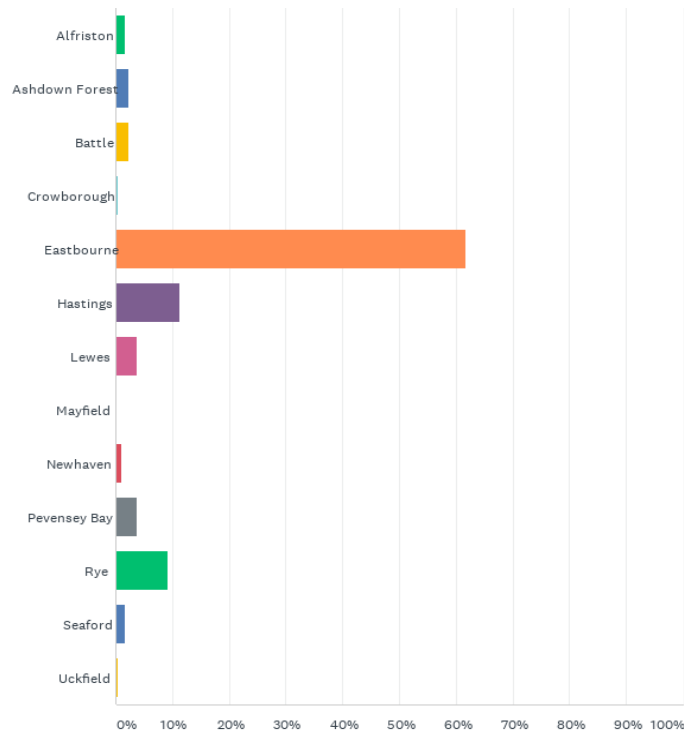
- 62% named Eastbourne as the location where they stayed when last visiting East Sussex. Eastbourne is by far the highest-ranking location in East Sussex.
- Hastings received the next highest score with 11%.
- Rye ranked third, with 9% of respondents stating it was the location they last stayed in when visiting East Sussex.
- These trends are broadly consistent across all ages, although Lewes was mentioned by 12% of 18–24-year-olds.

➤ **Insight: Remember a high proportion of respondents were from the Visit Eastbourne database which may skew the data!**

Q19: In which location did you stay when you last visited East Sussex?

All data

Answered: 2,604 Skipped: 650

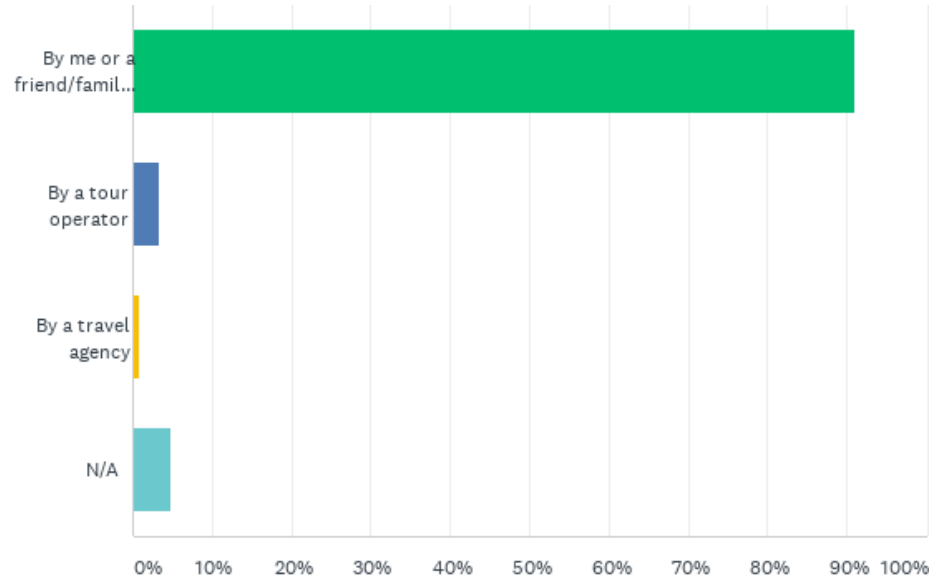


ANSWER CHOICES	RESPONSES	
Alfriston	1.73%	45
Ashdown Forest	2.30%	60
Battle	2.30%	60
Crowborough	0.46%	12
Eastbourne	61.64%	1,605
Hastings	11.25%	293
Lewes	3.76%	98
Mayfield	0.27%	7
Newhaven	1.08%	28
Pevensey Bay	3.84%	100
Rye	9.22%	240
Seaford	1.69%	44
Uckfield	0.46%	12
TOTAL		2,604

How do people organise their trips to East Sussex?

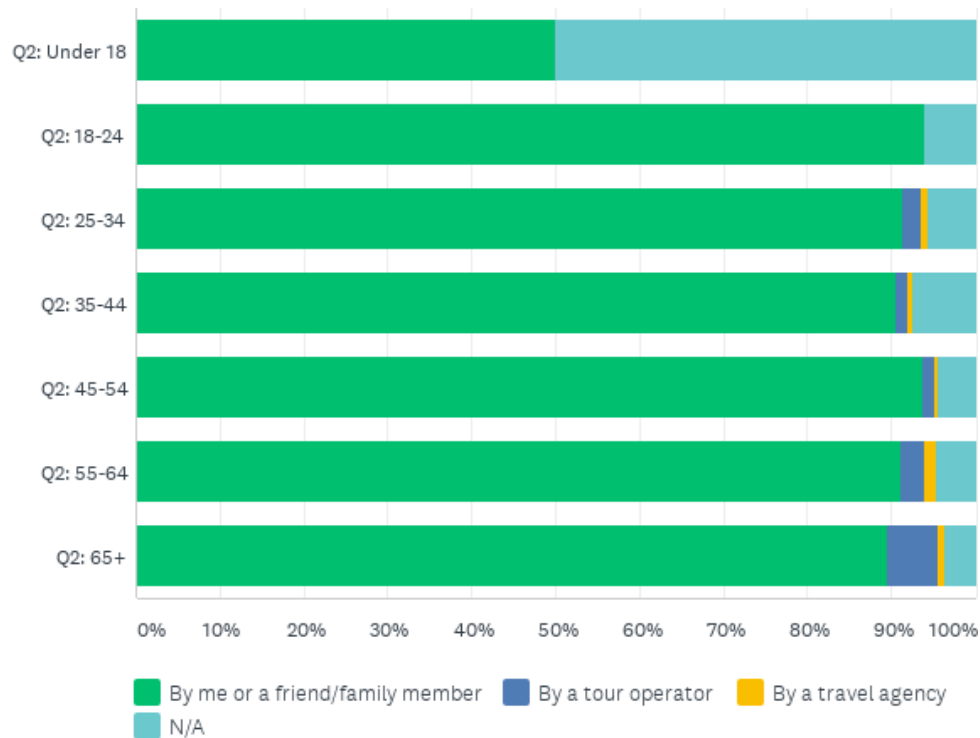
(Reference Q20)

- 91% of respondents visited East Sussex having organised the trip themselves or via a friend or family member.
- Only 3% visited East Sussex via a tour operator, although this rose to 6% within the 65+ age group.



Q20: How was your trip to this location organised?

Answered: 2,604 Skipped: 650



	BY ME OR A FRIEND/FAMILY MEMBER	BY A TOUR OPERATOR	BY A TRAVEL AGENCY	N/A	TOTAL
Q2: Under 18	50.00% 4	0.00% 0	0.00% 0	50.00% 4	0.31% 8
Q2: 18-24	93.94% 31	0.00% 0	0.00% 0	6.06% 2	1.27% 33
Q2: 25-34	91.43% 128	2.14% 3	0.71% 1	5.71% 8	5.38% 140
Q2: 35-44	90.49% 257	1.41% 4	0.70% 2	7.39% 21	10.91% 284
Q2: 45-54	93.70% 491	1.53% 8	0.38% 2	4.39% 23	20.12% 524
Q2: 55-64	91.20% 736	2.85% 23	1.24% 10	4.71% 38	30.99% 807
Q2: 65+	89.60% 724	6.06% 49	0.62% 5	3.71% 30	31.03% 808
Total Respondents	2,371	87	20	126	2,604

What did people think having visited East Sussex? /1

(Reference Q21)

- 77% of all respondents completely agreed with the statement “*I am pleased that I decided to visit East Sussex*”.
- Only 46% of respondents completely agreed with the statement “*My visit to East Sussex exceeded my expectations*”. A further 34% somewhat agreed with the statement.
- 59% of respondents completely agreed with the statement “*I will speak highly of this tourist destination to my friends and colleagues*”. A further 28% somewhat agreed with the statement.
- 75% of respondents completely agreed with the statement “*I would choose to visit East Sussex again*”. 18% somewhat agreed with this statement.

What did people think having visited East Sussex? /2 (Reference Q21)

- 68% of respondents completely agreed with the statement “*I will recommend East Sussex to my friends and relatives*”. A further 22% somewhat agreed with this statement.
- 64% of respondents completely agreed with the statement “*I felt very welcomed in this destination*”. A further 23% somewhat agreed with this statement.
- Trends were similar across all age groups, although younger respondents aged under 24 disagreed more with the above statements in most cases, with the exception of feeling welcomed. Those under age 18 felt more welcomed than other age groups although those aged 18-24 felt the least welcomed.

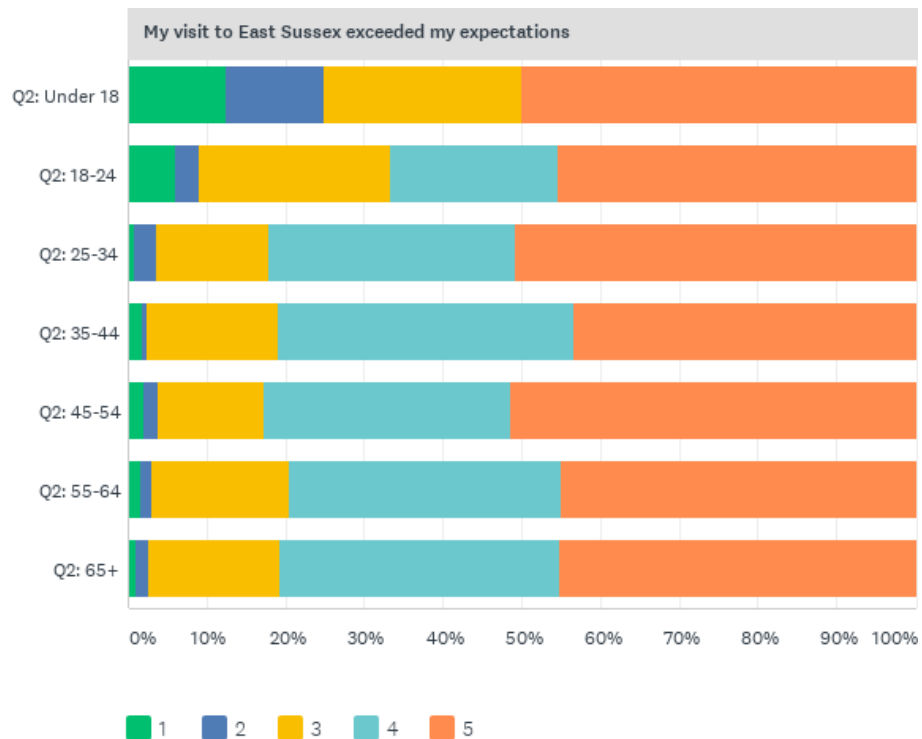
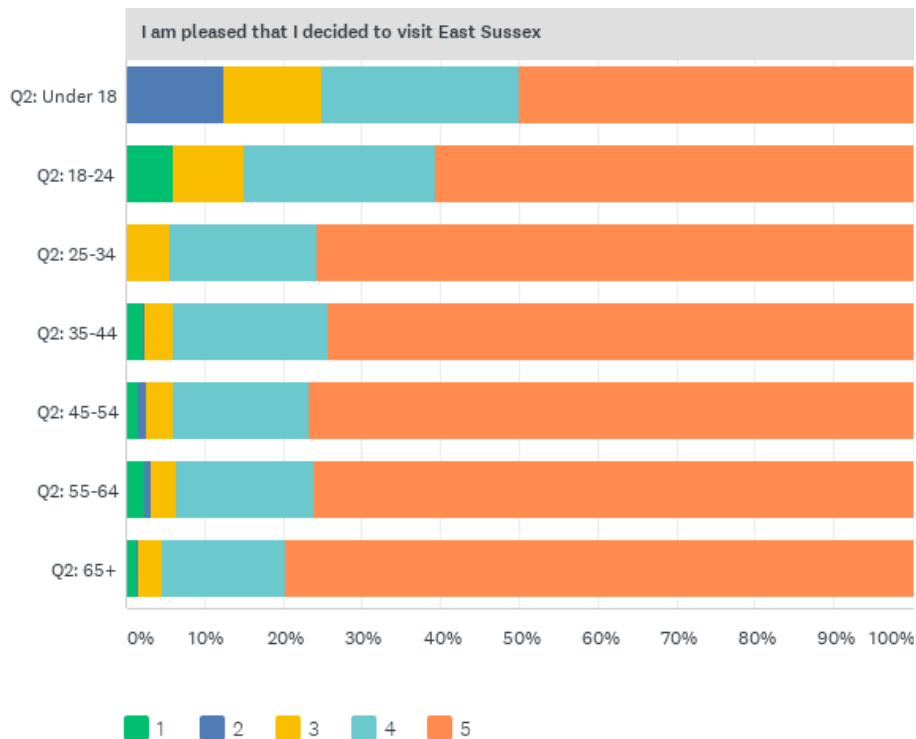
**Q21: To what extent do you agree with the following statements.
(1 means you completely disagree and 5 means you completely agree.)**

Answered: 2,604 Skipped: 650

	1	2	3	4	5	TOTAL
I am pleased that I decided to visit East Sussex	1.81% 47	0.62% 16	3.46% 90	17.28% 449	76.83% 1,996	2,598
My visit to East Sussex exceeded my expectations	1.54% 40	1.62% 42	16.29% 422	34.08% 883	46.47% 1,204	2,591
I will speak highly of this tourist destination to my friends and colleagues	1.39% 36	1.51% 39	9.65% 250	28.19% 730	59.27% 1,535	2,590
I would choose to visit East Sussex again	1.97% 51	0.54% 14	4.20% 109	18.35% 476	74.94% 1,944	2,594
I will recommend East Sussex to my friends and relatives	1.70% 44	0.89% 23	7.65% 198	21.55% 558	68.21% 1,766	2,589
I felt very welcomed in this destination	1.86% 48	1.24% 32	9.87% 255	23.49% 607	63.54% 1,642	2,584

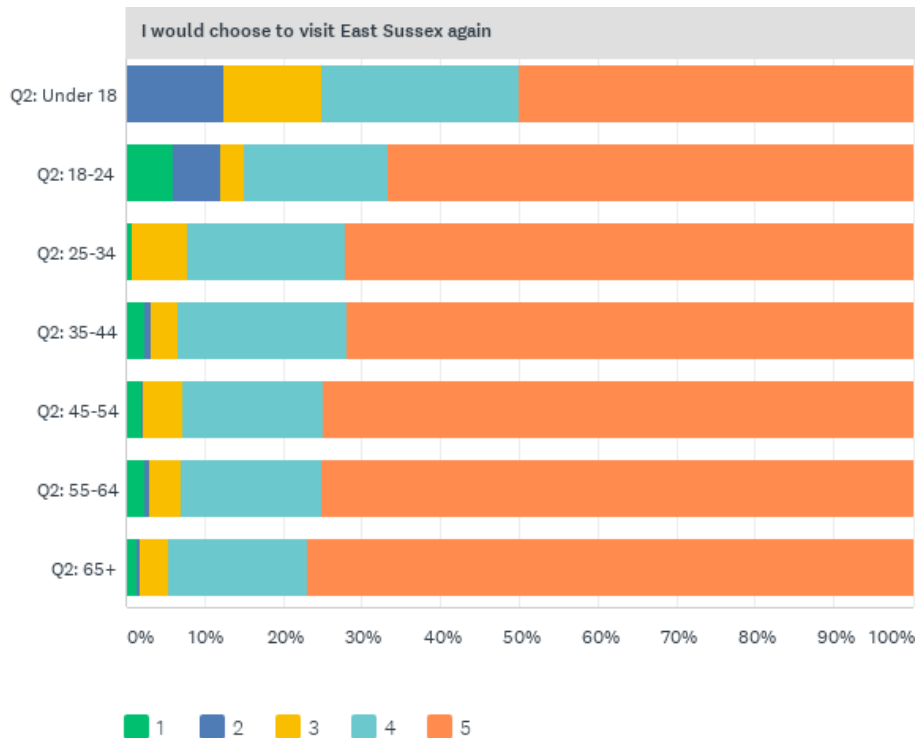
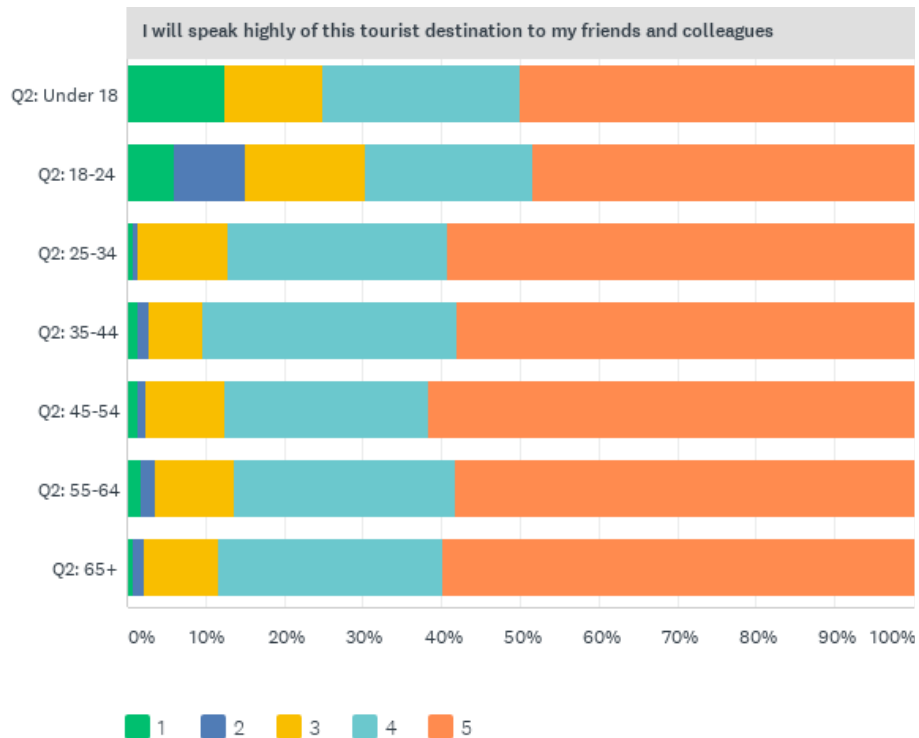
Q21: To what extent do you agree with the following statements - by age. (1 means you completely disagree and 5 means you completely agree.)

Answered: 2,604 Skipped: 650



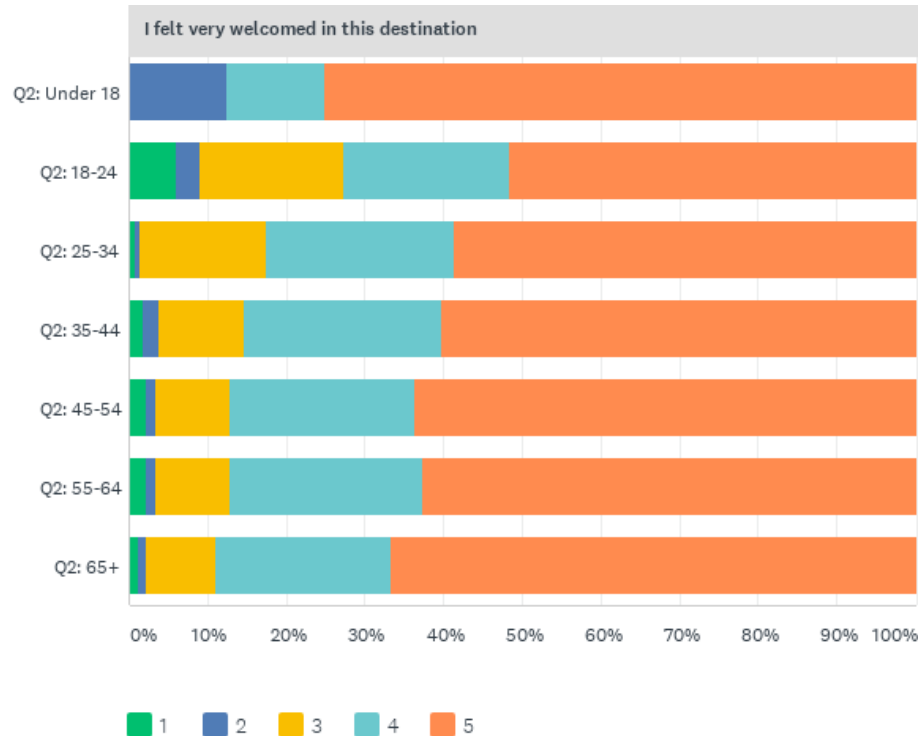
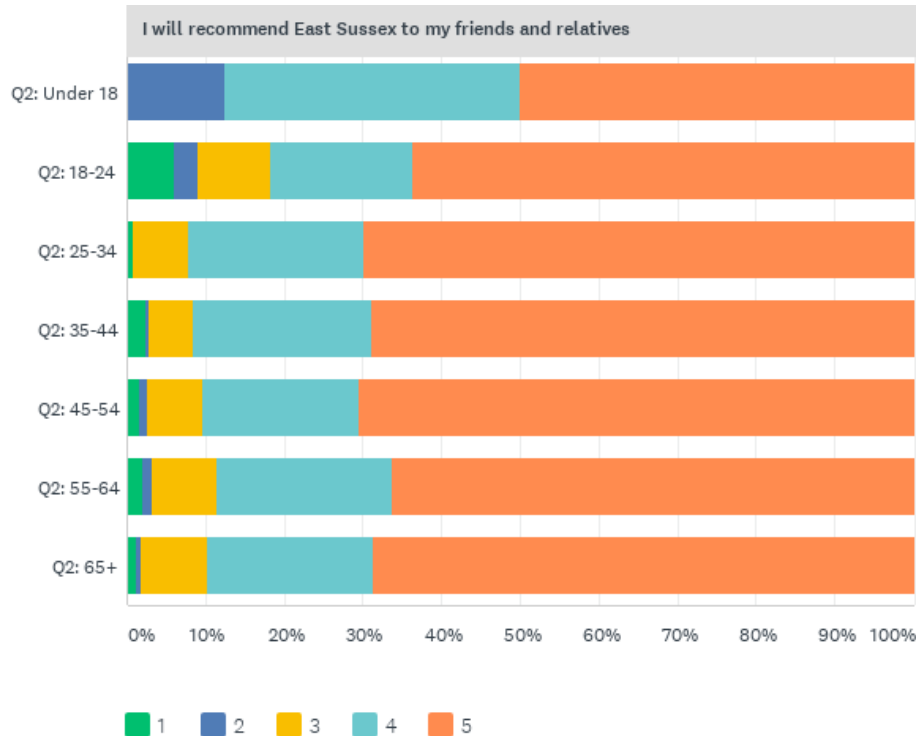
Q21: To what extent do you agree with the following statements – by age. (1 means you completely disagree and 5 means you completely agree.)

Answered: 2,604 Skipped: 650



Q21: To what extent do you agree with the following statements – by age. (1 means you completely disagree and 5 means you completely agree.)

Answered: 2,604 Skipped: 650



The End

Survey independently conducted by Prowse & Co. Ltd

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