Portsmouth
Economic Impact Research

TOURISM SOUTH EAST

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Registered in England No. 01345038

Registered office:
40 Chamberlayne Road
Eastleigh
Hampshire
Tel: +44 (0) 23 80625459

VAT Registration No. GB 190 0026 08

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1 INTRODUCTION

1.1 Study purpose

The purpose of this study was to provide Portsmouth City Council with a better understanding of the economic impact of visitors to Portsmouth and Southsea using a bespoke methodology to enable real time local data to be used rather than rely on national data that is often not available until months after it was collected. The data provided will be used to develop plans, post Covid, to help inform future decision making.

The programme aims to be a three-year long research project with the key elements, such as accommodation audit, visitor survey and visual car park counts collected once every three years. The project can then repeat itself replicating the same program of research.

1.2 Research methodology

The following elements were decided to be the key drivers for the study:

- Visitor accommodation audit
- Occupancy survey
- Car park data
- Coach numbers
- Attraction visitor numbers
- Festival/event visitor numbers
- Face to face visitor survey

The accommodation audit was conducted using online searches of data from a number of sources, including through the Internet and the Thomsons Business Database. Using a combination of desktop-research and follow-up telephone calls, where necessary. Once this data was collated, a telephone occupancy survey was conducted amongst businesses.

Car park data, including number of spaces, income and usage was obtained from the council. In addition to this, observations were made on several days each month at various key car parks in Southsea to establish the number of people in each car. This was then used in conjunction with the data obtained from the council to help estimate the number of visitors to the city and the average length of stay.

Attraction visitor numbers, festival attendance numbers and coach counting were all also used to estimate the number of visitors.

Finally, a face to face survey was conducted on several days each month to help build a picture of type of visitor, mode of transport, length of stay. The data was combined with all other data obtained in a computer model to then estimate the current economic impact of tourism on Portsmouth.

Further to this, Cambridge Economic Impact Models have been run for the past five years to provide a baseline for comparison.

1.3 Presentation of findings

Key findings are presented under the following headings:

- Cambridge economic impacts data 2016 to 2020
- Accommodation study
- Visitor estimates 2021

Results are presented in table or graph format when applicable with additional commentary highlighting key points. The appendices contain a copy of the visitor survey questionnaire, links to a map of car park locations and the full accommodation audit, a list of visitor attractions and a list of festivals and events.

It should be borne in mind that this is an ongoing programme of research and, as such, some assumptions have been made due to incomplete data at this point in time. Once a full year of visitor survey data has been collected, recalculations will be made and some figures may be adjusted at this point.

2 CAMBRIDGE ECONOMIC IMPACT DATA 2016 TO 2020

2.1 Overview

Cambridge Model results were last produced for Portsmouth in 2016, a time when the national day visits survey had changed its methodology and so making the day visit data incomparable with previous years. The Cambridge Model has now been run for each year since and the results are presented here.

It should be noted that due to the Covid-19 travel restrictions in 2020 the collection of data for national surveys that are used to support the Cambridge Model templates was not available. Following discussions with an economic advisory consultant, it was advised that the only valid way to provide figures for 2020 was to apply the published national decline in visitor numbers and spend (where available) to the Cambridge Model data from the previous year. Therefore, the data provided for 2020 should be seen as an indicative overview of that year rather definitive and treated with a level of caution.

2.2 Overnight visits

Due to several periods of lockdown across the country in 2020 and varying travel restrictions being imposed the number of domestic overnight visits fluctuated throughout the year. The average decline of 61% in domestic trips and a national estimated annual average decline of 29% in serviced accommodation occupancy was used to estimate the figures.

In 2020 overseas visits were confined to the first quarter of the year and then very few essential or work-based trips throughout the remainder of the year. Based on the Visit Britain figures of a decline in overseas visitor number by 73% and overseas spend by 78% we have calculated the figures for Portsmouth in 2020.

Table 1: Staying trips

	Domestic	% change	Overseas	% change	Total	% change
2016	617,000		109,000		726,000	
2017	652,000	6%	119,000	9%	771,000	6%
2018	625,000	-4%	112,000	-6%	737,000	-4%
2019	567,000	-9%	117,000	4%	684,000	-7%
2020	207,000	-63%	35,000	-70%	242,000	-65%

Table 2: Staying nights

	Domestic	% change	Overseas	% change	Total	% change
2016	1,606,000		679,000		2,285,000	
2017	1,726,000	7%	880,000	30%	2,606,000	14%
2018	1,632,000	-5%	784,000	-11%	2,416,000	-7%
2019	1,501,000	-8%	781,000	0%	2,282,000	-6%
2020	547,000	-64%	231,000	-70%	778,000	-66%

Table 3: Staying spend

	Domestic	% change	Overseas	% change	Total	% change
2016	£109,659,000		£44,767,000		£154,336,000	
2017	£123,454,000	13%	£52,331,000	17%	£175,785,000	14%
2018	£116,031,000	-6%	£46,729,000	-11%	£162,760,000	-7%
2019	£104,790,000	-10%	£57,238,000	22%	£162,028,000	0%
2020	£37,679,000	-64%	£17,942,000	-69%	£55,621,000	-66%

2.3 Day visits

Domestic day trips were also impacted by the numerous lockdowns and travel restrictions in 2020 with the number of trips down by 22% and the spend down by 64%. This significant decrease in spend compared to trips is attributed to a number of factors including; increase in trips being taken in the countryside or open air locations; the number of retail and eating establishments that were closed due to the pandemic; social distancing and cautiousness in indoor spaces.

Table 4: Day visitor trips and spend

	Trips	% change	Spend	% change
2016	13,060,000		£423,000,000	
2017	12,830,000	-2%	£425,900,000	1%
2018	13,472,000	5%	£459,972,000	8%
2019	14,200,000	5%	£453,000,000	-2%
2020	11,218,000	-21%	£149,490,000	-67%

2.4 Value of tourism

In addition to overnight and day visitor spend, further 'additional expenditure' spent by visitors on second homes / boats and by friends and relatives, whom visitors are staying with or visiting, needs also to be accounted for as this represents a significant additional source of income for local businesses.

Table 5: Total other trip related spend
(second homes, boats, static caravans, friends and family)

	Total	% change
2016	£11,622,000	
2017	£12,319,000	6%
2018	£11,808,000	-4%
2019	£11,203,000	-5%
2020	£4,429,000	-60%

Table 6: Businesses in receipt of direct visitor spend

	Staying	% change	Day	% change	Total	% change
2016	£153,031,000		£296,787,000		£449,818,000	
2017	£174,828,000	14%	£408,863,000	38%	£583,691,000	30%
2018	£162,216,000	-7%	£441,573,000	8%	£603,789,000	3%
2019	£161,487,000	0%	£434,880,000	-2%	£596,367,000	-1%
2020	£55,929,000	-65%	£143,510,000	-67%	£199,439,000	-67%

In addition to the business turnover generated in those businesses directly receiving visitor income, successive rounds of expenditure, that is spending by these businesses on local supplies (indirect impacts) and spending by employers in the local area (induced impacts), the multiplier impact comes into effect.

Drawing together direct business turnover, supplier and income induced expenditure, and the additional expenditure spent on second homes and by friends and relatives, the total value of tourism activity in Portsmouth can be estimated.

Table 7: Income for local businesses generated by trip expenditure

	Direct	% change	Supplier and income induced	% change	Total	% change
2016	£449,818,000		£151,743,000		£601,561,000	
2017	£583,691,000	30%	£195,743,000	29%	£779,434,000	30%
2018	£603,789,000	3%	£201,133,000	3%	£804,922,000	3%
2019	£596,367,000	-1%	£198,654,000	-1%	£795,021,000	-1%
2020	£199,439,000	-66%	£66,649,000	-66%	£266,088,000	-66%

2.5 Employment

The number of jobs both directly and indirectly supported by tourism in Portsmouth is based on the population and employment figures provided by the Office for National Statistics. Many of these jobs are part-time or seasonal in nature and are spread across a wide range of service sectors from catering and retail to public service jobs such as in local government, not just tourism.

Table 8: Local employment supported by the visitor economy

	FTE	% change	Actual	% change
2016	9,102		12,574	
2017	11,754	23%	16,249	29%
2018	12,092	3%	16,726	3%
2019	11,945	-1%	16,525	-1%
2020	4,003	-66%	5,533	-67%

Table 9: Proportion of total district jobs supported by tourism

	Total	% change
2016	12.2%	
2017	15.5%	+3.3%
2018	15.9%	+0.4%
2019	15.6%	-0.3%
2020	5.5%	-10.1%

3 ACCOMMODATION STUDY

3.1 Accommodation audit

The audit of visitor accommodation established that, at present, there are 8,636 bedspaces available to visitors in Portsmouth and Southsea. 63% of these were in serviced accommodation and 37% in non-serviced accommodation. Hotels made up 92% of all serviced accommodation. Full details of establishments can be found in Appendix 3.

B&Bs	**Rooms/ Units**	**Bedspaces**
Broad Street 35	3	6
Ferry House Lodge	12	24
Fortitude Cottage	2	4
The Pier	6	12
The Sailmakers Loft	4	9
Hamilton House Bed & Breakfast	9	26
The White Lodge B&B	4	7
	40	**88**
Guesthouses	**Rooms/ Units**	**Bedspaces**
The Pembroke Park Hotel	8	16
Everley Guest House	9	16
Homestead Guest House	6	13
Britannia Guest House	7	22
St Margaret's Lodge	14	27
Upper Mount House	14	37
Rydeview Guest House	14	28
The Moorings Guest House	8	16
Esk Vale Guest House	8	16
Albatross Guest House	8	16
Fairlea Guest House	4	10
Waverley Park Lodge Guest House	12	27
Stylish Maritime Pods	5	10
	117	**254**
Inns	**Rooms/ Units**	**Bedspaces**
Innkeeper's Lodge Portsmouth/ Red Lion	16	32
The George Hotel	10	20
Acapulco Rooms	3	3
Duke of Buckingham	17	34
The Lady Hamilton	11	22
	57	**111**
Restaurants with rooms	**Rooms/ Units**	**Bedspaces**
Becketts	6	12
	6	**12**

Hotels	Rooms/ Units	Bedspaces
Stattons Boutique Hotel	9	18
Portsmouth Marriott Hotel	174	348
Somerset House Boutique Hotel	6	16
Florence House Hotel	7	18
Florence Gardens Boutique	6	12
Florence Suite Boutique Hotel	8	16
The Clarence Boutique Hotel	8	16
Ye Spotted Dogge	6	12
Ibis Portsmouth Centre	144	288
Farmhouse and Innlodge	74	150
Royal Beach Hotel (Best Western)	124	239
Seacrest Hotel	27	54
G8 Boutique Hotel	17	34
Ocean Hotel & Apartments	35	70
Ibis Portsmouth Budget	120	240
Southsea Rocks Hotel	10	45
Queen's Hotel	74	148
Royal Maritime Club	101	202
The Sandringham Hotel (rooms + apartments)	50	100
Keppel's Head Hotel	30	62
The Ship Leopard Hotel	13	26
Holiday Inn Express Gunwharf Quays	130	260
G! Boutique Hotel	14	28
Hoilday Inn Portsmouth	173	346
Premier Inn Portsmouth North Harbour	65	130
Premier Inn Portsmouth (Port Solent)	108	216
Premier Inn Portsmouth Southsea	48	96
Premier Inn Southsea	40	80
Premier Inn City Centre	84	168
Holiday Inn Express Portsmouth North	150	300
Ashbys Boutique Accommodation	10	35
Premier Inn Portsmouth Dockyard	120	240
Travelodge Portsmouth Hilsea	33	66
Travelodge Portsmouth	108	303
Travelodge Portsmouth City Centre	152	304
Village Hotel	153	306
	2431	**4992**
Total serviced	**Rooms/ Units**	**Bedspaces**
	2651	**5457**

Self catering	Rooms/ Units	Bedspaces
Old Victory House	1	11
Battery House	1	8
Portsmouth Inns Apartment	1	2
Flat 2 St Helen's House	1	4
St Helens House Flat 2 and 3	2	17
White House	1	2
Ocean Apartments	9	32
South Parade Apartments	10	48
Atlantic Apartments	7	26
Admiralty Apartments	4	18
Salisbury Apartments	5	10
GWQ Apartments	10	20
Apartment 10 Queensgate	1	10
In the Heart of Southsea Apartments 1 and 2	2	17
Somers House	1	7
Thirty Barons	1	8
Work Rest and Play	6	12
Blue Star House	1	5
Victorin House	1	13
Orchard Apartment	1	6
Orchard Garden Apartment	1	6
Upper Strand Apartment	1	5
40 The Retreat	3	10
Angeldale	1	9
Balmoral by the Beach	1	5
Bayfields	1	5
Cavendish Place	1	4
City Centre Apartment	1	6
Coastal Retreat	1	2
Consul Court Apartments Flat 4	1	5
Cottage Grove Guest Rooms	1	4
Court Side Apartment	1	4
Easy By the Beach	1	
Elegante Apartment	1	4
Flat 17 The Berkeley	1	4
Greenhays Business/Holiday Accommodation	1	4
Gunwharf Quays Apartment	1	2
Home by Unilife Serviced Apartments	123	246
Isambard Brunel Road Apartment	1	4
Kings Lodge Flat 3	1	8
Liss Rooms	1	
Lowcay Apartment D	1	4
No 14 (Apartment)	1	4
Pitcroft Lane	1	4

Reginald Budget Accommodation	1	6
Utopia 007	3	9
Willow Retreat	1	6
Accudo House	4	12
	223	**658**
Additional self catering (also on AirBnB)	**Rooms/ Units**	**Bedspaces**
Southsea Studios	1	2
Berkeley by the Beach	1	4
Albany Garden Apartment	1	5
Orchard Loft	1	4
Canterbury Hollow	1	4
Cathedral View	1	3
Elm View	2	6
Fawcett Folly	2	4
Francis Heights	2	6
Hannah House	2	6
Harold House	4	10
Jessie Rooms	4	8
Lady Hamilton Cottage	1	2
Linda's BNB	1	2
Lion 9	1	3
Little Connaught House	1	6
MooMoo Beach House	2	4
Morley Cottage	3	8
Nelson Suite	1	2
Penny Perfect	3	6
Sandpiper Place	1	4
Seagull Place	2	6
Solent Retreat	1	4
Spice Cottage	3	6
St George's Balcony Suite	1	4
Ted House	3	6
The Beach at the end of the Road	2	8
The Coach House	1	4
The Lodge	2	4
The Musicians Seaside Getaway	1	4
The Potters	3	6
	55	**151**
Caravan and camping	**Rooms/ Units**	**Bedspaces**
Harbourside Park	78	312
Southsea Leisure Park	176	624
	254	**936**

Group accommodation	Rooms/ Units	Bedspaces
Catherines House Campus Accommodation	165	165
Rees Hall	264	279
The Peter Ashley Activity Centre	15	100
University of Portsmouth	890	890
	1334	**1434**
Total non-serviced	**Rooms/ Units**	**Bedspaces**
	1886	**3179**
Total accommodation stock	**Rooms/ Units**	**Bedspaces**
	4517	**8636**

3.2 Occupancy survey

A telephone survey was conducted amongst all accommodation listed in the audit to establish room or unit occupancy in 2021. Originally, we had envisaged conducting an online occupancy survey, but having recently attempted a similar survey of our members and having such a poor uptake, we thought it would be more successful to contact businesses directly by telephone. It should, however, be borne in mind that occupancy surveys are notoriously difficult to conduct due to reasons such as proprietors being suspicious of the motives for data collection and unwilling to supply information, smaller establishments being difficult to contact and being unable to speak to the relevant person in larger establishments.

With this in mind, we managed to obtain occupancy data from a quarter (23%) of the establishments.

Serviced accommodation reported an overall average of 57% room occupancy during the year and non-serviced establishments reported an average unit occupancy of 70% over the year.

57% **70%**

We are currently sorting a licence to enable us to obtain occupancy data from AirDNA. When obtained, this may alter the overall occupancy level to some degree.

4 VISITOR ESTIMATES 2021

4.1 Background

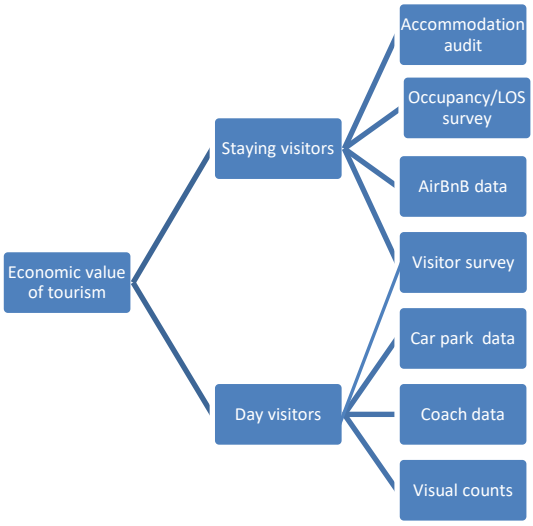
The alternative to estimating economic impact data using the Cambridge Model, and therefore relying on increasingly unreliable national data, is to go with a bottom-up methodology dependant on local data. Both top-down and bottom-up methodologies come with varying margins of error and the bottom-up approach does tend to be more expensive because of the additional data collection required. However, using this approach does mean that data is available more quickly and, once a baseline is established, it can be updated year on year by monitoring some of the key indicators to keep costs down.

4.2 Methodology

The two types of visitor that economic impact models measure are staying and day visitors. Staying visitors are relatively easier to calculate because their numbers relate directly to the amount of bedstock in the city. An accommodation audit for Portsmouth and Southsea was conducted including AirBnB data, which has become a key component of the visitor economy over the last five or so years. To establish occupancy and length of stay, a telephone survey of accommodation providers was conducted. It can be a challenge to persuade accommodation operators to participate in this type of survey and only a few were able to provide meaningful length of stay, therefore this was established from the face to face visitor survey.

The bigger challenge is to calculate the volume and value of day visitors. In the case of Portsmouth and Southsea day visitors are mainly concentrated in Southsea, Gunwharf Quays and the Historic Dockyard. Using the visitor survey as a base to estimate the proportion of people arriving by car and the percentage of day visitors, car park usage data was provided by the council (via ticket sales) and Gunwharf Quays (data still to be supplied by the Historic dockyard). At this point in the research, we are having to assume that all car park users are visitors, however, we are working on a more robust way to estimate the proportion that are visitors for the final report. A visual count of the number of occupants in cars arriving and leaving at key sites was conducted to provide an average number of people per car. A calculation was then applied to estimate the number of day visitors to the city arriving by car. The mode of transport data from the visitor survey then allowed us to apply this percentage to the figure obtained for those arriving by car to obtain a total estimate of day visitors to the city in 2021.

Below is a flow chart which summarises the approach.



As the counting and survey elements are not complete for a year (the project started in August 2021), the figures may alter slightly when a year of data is available. Data on coach visitors is still to be formalised.

The nature of this project is that when new data is available it can be easily added to the template to update results and can be replicated for future years.

4.3 Overnight visitors

The process for calculating overnight visitors has been calculated separately for serviced and non-serviced accommodation due to the difference in occupancy levels and the way occupancy is calculated.

For non-serviced accommodation the total number of units available is multiplied by occupancy rate to give the number of nights used. This is then multiplied by the average group size (taken from the visitor survey). This figure is the number of nights in non-serviced accommodation which, when divided by the average length of stay (taken from the visitor survey), provides the number of trips associated with stays in non-serviced accommodation. The audit currently assumes that all establishments are open all year. Further research will be conducted to verify when establishments are open during the year to ensure more accurate estimates in future reports and the data used from the visitor survey will alter once a full year of data is available.

Total units available	x	Occupancy	=	Unit nights occupied	x	Average group size	=	Total nights
24,388	x	70%	=	17,072	x	2.92	=	341,850

Total nights	/	Average length of stay	=	Total trips
341,850	/	7.08 nights	=	48,284

To calculate results for serviced accommodation the total number of rooms available is multiplied by occupancy rate to give the number of room nights used. This is then multiplied by the average number people occupying a room (figure taken from previous research – but the question will now be included in the current survey) to give the number of nights in serviced accommodation. This figure is then divided by the average length of stay (taken from the visitor survey), provides the number of trips associated with stays in serviced accommodation.

Total rooms available	x	Occupancy	=	Room nights occupied	x	Average people per room	=	Total nights
1,014,104	x	57%	=	578,039	x	1.8	=	1,040,470

Total nights	/	Average length of stay	=	Total trips
1,040,470	/	2.41 nights	=	431,730

To obtain a figure for those staying with friends or relatives we need to await a complete year of visitor survey data.

4.4 Day visitors

To calculate the number of day visitors the total number of car park spaces occupied was multiplied by the average number of people in cars. An assumption was made that on street free parking spaces were occupied for half the year but for twice a day (based on the average length of stay of day visitors from the visitor survey). This assumption will need to be refined to better reflect monthly usage patterns and some additional parking data still needs to be obtained (eg. the car park opposite Wightlink car ferry terminal and Historic Dockyard car park). Due to the lack of car park data from the Historic Dockyard, their published visitor numbers for 2021 were added to the end figure.

Car park spaces occupied **x** Average number of people per car **=** Total day visitors by car + Dockyard visitors **/** Percentage arriving by car **x** Percentage using other transport **=** Total day visitors
2,693,735 x 2.74 = 7,380,834 + 438,376 / 78 (100,246) x 22 (2,205,418) = 10,024,628 day visitors

It should be noted that this figure is liable to change once a full year of data from the visitor survey and car park counts has been achieved. The figure also only represents those visiting the Dockyard area and Southsea. A number of issues will be redressed when the data is recalculated at the end of a full year of survey work as this is an under-representation of day visitors.

4.5 Total economic impact estimates

To estimate the total economic impact of visitors to the Portsmouth economy, we multiply the number of staying and day trips calculated above by the average spend per person per trip taken from the visitor survey.

Table 10: Value of tourism

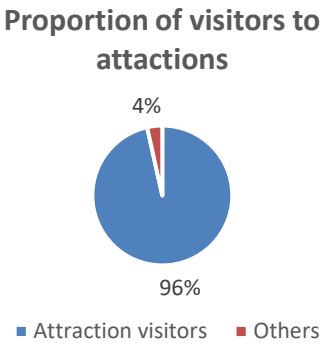
	Number	Ave.spend per head	Total spend
Staying nights	1,382,320	£115.23	£159,284,734
Day visitors	10,024,628	£37.52	£376,124,043
Total	11,409,948		£535,408,777

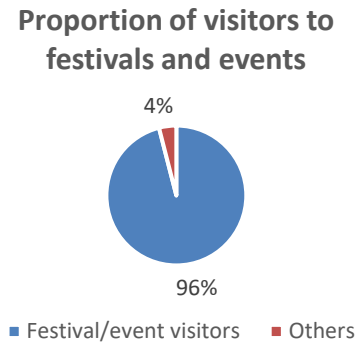
The total impact on businesses and therefore jobs created will be calculated once a full year of data has been collected.

4.6 Estimated proportion of visitors to attractions and festivals

The estimated number of people visiting Portsmouth and Southsea attractions last year was estimated to be 406,200. This is 4% of the total estimated visitors to the city.

The estimated number of people attending a festival or event in Portsmouth last year was estimated at 486,877. This calculates to 4% of the total estimated visitors to the city.





5 APPENDICES

APPENDIX 1: Visitor survey questionnaire

PORTSMOUTH VISITOR SURVEY 2021/22

Date: / /21 **Time:** ..... **Interviewer initials:** .....
Interview location: Clarence Pier 1 South Parade Pier 2 Southsea Castle 3

Good morning/afternoon, I'm from the regional tourist board (Tourism South East). We are conducting a survey of visitors to Portsmouth/Southsea. It should take no more than 10 minutes. Would you be willing to take part?

A. Do you live in Portsmouth/Southsea?
(Postcodes PO1-PO6)
YES 1 *(Thank & Close)* *Keep tally* .....
NO 2 *(Continue)*

B. How close to the end of your visit are you?
Just going 1 *(Continue)*
Staying a while longer 2 *(Continue)*
About half way through 3 *(Continue)*
Just arrived 4 *(Thank & Close)*

Keep tally of closed interviews .....

C. What is your MAIN reason for visiting Portsmouth/Southsea?
(SHOWCARD 1 - one response only)

Leisure/holiday	1	
Visiting friends or relatives	2	
Special shopping trip (non-reg)	3	
Language student	4	
To catch a ferry	5	
Go to a restaurant/pub	6	
Attend an event *(specify)*	7	
.....		
Shopping trip (household/ regular shopping)	8	*(Thank & Close)*
Work/study here	9	*(Thank & Close)*
Other e.g. wedding *(specify)*	10	*(Thank & Close)*

Keep tally of closed interviews .....

1. What is your normal place of residence?

Town.....

County or Country.....

2a. Have you come from there today?
Yes 1 No 2

2b. Are you returning there today?
Yes 1 No 2

If 'YES' to both Q2a & Q2b, Go to Q5a

3. What sort of accommodation are you staying in?

Hotel	1
B&B	2
Pub/inn	3
Rented self-catering house/cottage/flat	4
Touring caravan	5
Static caravan – owned	6
Static caravan – rented	7
Camping	8
Youth Hotel	9
Boat/yacht	10
Holiday centre/village	11
Language school	12
Home of friend/relative	13
Second home	14
University accommodation	15
Other *(specify)*.....	16

4.Where are you staying?

Portsmouth/Southsea	1 *(Go to Q4a)*
Elsewhere *(specify nearest town)*	2 *(Go to Q5a)*

.....

4a. How many nights are you spending in total in Portsmouth/Southsea? *(STAYING visitors only)*

[ ] nights

4b. Could you tell me the total cost of your accommodation for the whole period you and your group are staying there? *(round to nearest pound)*

£.....

Don't know/Can't recall/Refused -1
NB: Put "0" if spent/expect to spend nothing

4c. We are interested in your opinions on the SATISFACTION of your accommodation. On a scale of 1 to 6 where 1 = 'not at all important' and 6 = 'very important' *(SHOWCARD 2)* how would you rate the following:

Very poor 1 Good 4
Poor 2 Excellent 5
Satisfactory/average 3 Don't know 6

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

Go to Q6

6a. Approximately what time did you arrive in Portsmouth/Southsea today? *(DAY visitors only)*

..... (24 hr clock – to the nearest hour)

6b. Approximately what time do you expect to leave Portsmouth/Southsea today? *(DAY visitors only)*

..... (24 hr clock – to the nearest hour)

6. Is this your first ever visit to Portsmouth/Southsea?
YES -1 *(Go to Q8)* NO -2 *(ask Q7)*

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

DAY trips:	STAYING visits:
[ ]	[ ]

8. When did you decide to visit Portsmouth/Southsea?

Whilst passing through	1
Earlier today	2
This week (i.e. last 7 days)	3
Within last month	4
1-3 months ago	5
3-6 months ago	6
More than 6 months ago	7

9. Had you seen any advertisements, leaflets or promotions for Portsmouth/Southsea prior to your visit? *(READ LIST – circle all that apply)*

Leaflets/brochures	1
Posters	2
Newspaper/magazine adverts	3
Radio adverts	4
Web site *(specify)*.....	5
Other *(specify)*.....	6
NONE	7

10. Can you tell me what FEATURES or IMAGES first come to mind when you think of Portsmouth? *(up to 3)*

1) .....

2) .....

3) .....

11. How influential were each of the following factors in your decision to visit Portsmouth? *Read list (SHOWCARD 3 – circle one response for each row)*

	Very imp.	Quite imp.	Not very imp.	Not imp. at all
Beaches and water based activities	-4	-3	-2	-1
Scenic environment	-4	-3	-2	-1
Interesting historic ships, buildings or sites	-4	-3	-2	-1
Good shopping	-4	-3	-2	-1
Good evening entertainment/shows	-4	-3	-2	-1
Local events	-4	-3	-2	-1
Good range of restaurants/pubs/places to eat	-4	-3	-2	-1
Good for sport/hobbies	-4	-3	-2	-1
Good range of alternatives in the event of wet weather	-4	-3	-2	-1
Peace and quiet	-4	-3	-2	-1
Free admission/access to sites	-4	-3	-2	-1
Plenty of things for adults to see & do	-4	-3	-2	-1
Plenty of things for children to see & do	-4	-3	-2	-1
Availability of special offers	-4	-3	-2	-1
Good base for touring	-4	-3	-2	-1
Other factors – specify	-4	-3	-2	-1

12. How much do you estimate that you and your immediate party will have spent today and this evening in total on: *Put "0" if spent/expect to spend nothing*

a) **Eating & drinking** *(in cafes, restaurants, pubs, hotels etc)* £.....
Don't know/Can't recall/Refused ☐

b) **Shopping** *(souvenirs, guidebooks, clothes, sweets, drinks, food, other)* £.....
Don't know/Can't recall/Refused ☐

c) **Entertainment** *(inc. admission to attractions, cinema/theatre, tours etc)* £.....
Don't know/Can't recall/Refused ☐

d) **Travel & transport in Portsmouth** *(inc. fuel, fares, car parking charges etc)* £.....
Don't know/Can't recall/Refused ☐

13. How many people do these amounts cover?

☐ People

14. During this visit which of these places of interest have you visited or do you intend to visit? *(SHOWCARD 4 – circle all responses)*

Historic dockyard/historic ships	1
HMS Victory	2
Mary Rose	3
HMS Warrior 1860	4
National Museum of the Royal Navy	5
Harbour tours	6
D-Day Story	7
Blue Reef Aquarium	8
Southsea Castle	9
Charles Dickens' Birthplace	10
The seafront	11
Old Portsmouth	12
Hotwalls Studios	13
Gunwharf Quays	14
Southsea funfair/Clarence Pier	15
RN Submarine Museum (Gosport)	16
Spinnaker Tower	17
Portsmouth City Museum	18
Cumberland House Natural History Museum	19
Aspex	20
Southsea	21
City Centre shops	22
South Parade Pier	23
Canoe Lake	24
Other *(specify)*.....	25
NONE	26

15. What was the MAIN form of transport you used to reach Portsmouth/Southsea? *(ONE response only)*

Car/van/motorcycle/motorhome	1
Park and Ride bus	2
Bus/coach service	3
Coach tour	4
Train	5
Ferry	6
Private yacht/boat	7
Bicycle	8
Walked/on foot	9
Other *(specify)*	10

16. **We are interested in your opinions on the SATISFACTION of various aspects of your visit. On a scale of 1 to 6 where 1 = 'not at all important' and 6 = 'very important' *(SHOWCARD 6)* how would you rate the following:**

Very poor	1	Good	4
Poor	2	Excellent	5
Satisfactory/average	3	Don't know	6

Visitor attractions & other places to visit:						
-range	1	2	3	4	5	6
-quality of service	1	2	3	4	5	6
-value for money	1	2	3	4	5	6
Places to Eat & Drink:						
-range	1	2	3	4	5	6
-quality of service	1	2	3	4	5	6
-value for money	1	2	3	4	5	6
Shops:						
-range	1	2	3	4	5	6
-quality of the shopping environment	1	2	3	4	5	6
-quality of service	1	2	3	4	5	6
Ease of finding way around:						
-road signs	1	2	3	4	5	6
-pedestrian signs	1	2	3	4	5	6
-display maps & info. boards	1	2	3	4	5	6
Beach/sea/seafront:						
Quality of environment and appearance:						
- cleanliness of sea	1	2	3	4	5	6
Public toilets:						
-availability	1	2	3	4	5	6
-cleanliness	1	2	3	4	5	6
Tourist Information Centres						
- ease of finding	1	2	3	4	5	6
- quality of service	1	2	3	4	5	6
- usefulness of info received	1	2	3	4	5	6
Cleanliness of streets	1	2	3	4	5	6
Upkeep of parks & open spaces	1	2	3	4	5	6
Availability of public seating	1	2	3	4	5	6
Choice of nightlife/ evening entertainment	1	2	3	4	5	6
Overall impression of Portsmouth in terms of:						
-general atmosphere	1	2	3	4	5	6
-feeling of welcome	1	2	3	4	5	6
Quality of public realm and streets:	1	2	3	4	5	6

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

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

PORTSMOUTH is not too overcrowded	1	2	3	4	5	6
I feel quite safe from crime in PORTSMOUTH	1	2	3	4	5	6
As a pedestrian in PORTSMOUTH I feel quite safe from traffic	1	2	3	4	5	6

18. **How would you rate the overall enjoyment of your visit to Portsmouth?** *(Read list)*

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

18. **How likely are you to recommend Portsmouth/Southsea to others?** *(Read list)*

Very unlikely	1 *(Go to Q19a)*
Unlikely	2 *(Go to Q19a)*
Possibly	3
Likely	4
Very likely	5
Don't know	6

18a. **Why do you say that?**

.....

ABOUT YOU AND YOUR GROUP:

20. **Including yourself, how many people in your immediate party are male and female, and which of these age groups do they fall into?** *(SHOWCARD 7)*

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

21. **What is/was the principle occupation of the chief income earner in your household?** *PROBE*

.....

Finally, could I have your name and email or phone number for the purpose of random verification of the survey? I should emphasise that this will be treated in the strictest confidence and only used for the purpose stated. Your details will not be held on file for longer than two months and will not be forwarded to any other party.

Name of respondent: .....

Email/Phone number: .....

APPENDIX 2: Portsmouth car park maps

https://goo.gl/maps/EUqaDR7vh1HXi8vSA

APPENDIX 3: Accommodation audit

Portsmouth Visitor Accommodation Audit.xlsx

APPENDIX 4: List of attractions

Visitor Attractions 844,576 estimated visitors 2021 (incomplete)	
Aspex	National Museum of the Royal Navy
Baffins Pond	Nelson Trail Self-guided Walk
Birthplace of Australia' Monument	No. 6 Cinema
Blue Reef Aquarium	Open Top 26, Southsea
Boathouse 4	Playzone
Canoe Lake	Portmsouth Harbour
Charles Dickens' Birthplace Museum	Portsmouth Cathedral
Clarence Pier Amusement Park	Portsmouth Guildhall
Clip N Climb Portsmouth	Portsmouth Historic Dockyard
Cumberland House Natural History Museum	Portsmouth Museum and Art Gallery
Eastney Beach	Portsmouth Natural History Museum
Eastney Engine Houses	Portsmouth Naval Memorial
Exciting Escapes	Portsmouth WW1 Cenotaph
Exploria and The Pyramids Centre	Round and Square Towers
Flip Out Portsmouth	Royal Garrison Church
Fort Cumberland	Royal Garrison Church
Great Salterns	Saint Mary's Church
Groundlings Theatre	South Coast Wakepark
Gunwharf Quays	South Parade Pier
Hilsea Jubilee Splash Pool	Southsea Beach Huts (for hire)
Hilsea Lido	Southsea Castle and Museum
Hilsea Lines	Southsea Common
HMS Trident Memorial	Southsea Model Village
HMS Vernon Figurehead	Southsea Rock Gardens
HMS Victory	Southsea Seafront
HMS Warrior	Southsea Skate Park
Hotwalls Studios	Southsea Splash Pool
Hovercraft Viewing Platform	Spinnaker Tower
Irving and Co Brewery Tour	St James Hospital Chapel
Isambard Kingdom Brunel Memorial	St John's Roman Catholic Cathedral
Jack House Gallery	St Thomas' Anglican Cathedral
King James's and Landport Gates	Tenth Hole Pitch and Putt
King James's and Landport Gates	The D Day Story
Kings Theatre	The New Theatre Royal
Krazy Kaves	The Portsmouth Distillery
Lumps Fort	The Real Escape, Portsmouth
Mary Rose Museum	The Trafalgar Memorial
Millenium Promenade	The WW1 Remembrance Centre
Milton Common	The Yomper
Milton Locks Nature Reserve	Tomb of General Sir Charles James Napier G.C.B.
Milton Park	Treasure Island Adventure Golf
Monitor HMS M.33	Victoria Park
Mountbatten Centre	Zingers Adventure Golf

APPENDIX 5: Festivals and events

Festival/Event	Date
486,877 estimated visitors 2021	
Country on the Coast	April
The Big 90's and 00' RnB Festival	April
Portsmouth Tattoo Fest	April
Banff Mountain Film Festival	April
Making Waves Film Festival	April
Portsmouth Comic Con	May
Portsmouth Chilli and Gin Festival	May
Portsmouth Vegan Festival	May
Queen Platinum Jubilee events tbc	June
Golden Touch Festival	June
Sea Angling Classic	June
Southsea Food Festival	July
Portsmouth International Kite Festival	July
Warrior Fest: The Flaggon's Curse	August
Victorious Festival	August
Sausage & Cider Festival	September
Portsmouth Climate Festival	October/November
Guy Fawkes Day	November
Victorian Christmas Festival at Historic Dockyard	December