TOURISM
SOUTH EAST

Brighton Cultural Quarter Venue Visitor & Economic Impact Study

Final Report

Submitted by Tourism South East on behalf of Brighton & Hove City Council

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Contents

Key economic terms

Multiplier

The multiplier concept is based on the premise that initial expenditure by visitors permeates through the rest of the economy with some of the expenditure “leaking out” of the economy. When visitors spend their money in hotels, restaurants, transportation services, visitor attractions and retail outlets, this will create direct income for recipient businesses. These businesses in turn re-spend a proportion of this income earned within the local area, leading to indirect and induced effects. For instance, when the visitor spends money in a restaurant, the restaurant will spend some of the money it receives on food and beverage supplies, some of it on transport, heating and lighting, accountancy and other business services, and so on.

All of these subsequent activities are classified as indirect effects, as the suppliers front-line tourism-related businesses find the demands for their services increase. It is often the case that these suppliers in turn go on to spend some of their earned income in the local area. In this case there will be further subsequent rounds of spending and this will continue, with the amount of money circulating getting smaller at each successive round of activity as money leaks out of the economy in the form of savings and imports, until the amount of money circulating in the economy as a result of the initial tourism spending becomes negligible.

The induced effects occur because at the direct and indirect levels of economic impact, income will accrue to residents of the local economy. Some of this money will be saved and some will leak out of the system (e.g. by spending a proportion of salaries elsewhere), but some of it will be spent on goods and services within the local economy and this will generate further rounds of economic activity. This additional activity and its subsequent effects reflect the induced effects of the initial change in tourist spending.

The multiplier effect refers to the sum of these different levels of impacts.

Additionality

A critical part of quantifying the economic impact is to establish what proportion of expenditure is genuinely additional, the net value. This means subtracting the expenditure that would have occurred anyway (the ‘deadweight’, see below).

Economic impact refers to 'new' money that has been 'injected' into the local economy (from outside) that would not otherwise have been present had the attraction/event not existed. So for example, all money spent by attendees at a festival who live close to where the festival is located is excluded from the 'net economic impact' estimate (money spent by this group of people is viewed as money which would have been spent in the local economy with or without the festival). Also, only money spent by attendees that were motivated to visit the area because of the attraction/event is included (see Attributability below).

Substitution or deadweight

It is assumed that if demand for the output of one industry is transferred to another, then it is unlikely to stimulate an economy. All expenditure made by local residents has to be excluded from the net economic impact of attractions/events as it is probable that this expenditure would still have been spent within the local area even if the attraction did not exist/the event did not happen. The vast majority of local visitors therefore get excluded at this stage from subsequent calculations of net economic value.

Attributability

In estimating the direct expenditure impacts it is important to determine the importance on the attraction/event on visitors’ decisions to visit the area under study. Broadly, the higher profile the attraction/event, the more likely it is that visitors are in the area solely to attend it. Those visiting an attraction whilst simply passing by, or those trip to the area has been motivated for some other reason are not included in the calculation of net economic impact.

Displacement

This is potential expenditure that is withdrawn from the local area because of the attraction/event. An example would be tourists who decided not to visit the area when a large event is taking place, possibly due to costs such as traffic congestion or increased prices for hotel rooms. Another example is the opening of a new attraction, which draws visitors away from another existing local attraction. An effect such as this is difficult to measure without conducting a much wider study to determine how many people were displaced.

1 Executive summary

1.1 Introduction

1.1.1 This report presents results from a face-to-face survey with a random sample of visitors at four of the cultural venues in Brighton between August 2010 and July 2011. These are the Brighton Dome, the Brighton Museum & Art Gallery, the Royal Pavilion, and the Theatre Royal. The survey also included interviews with visitors at a series of Brighton Festival events and exhibitions over May 2011. In total, 1,780 visitors were interviewed over the survey period combined across all venues.

1.1.2 The aim of the survey was to gather data on the profile of visitors, motivations for visiting, and visitor expenditure. The latter was gathered to assess the contribution these cultural venues make to the local economy of Brighton & Hove through visitor spending and associated multiplier effects.

1.2 Economic impact

1.2.1 Direct gross visitor expenditure generated by the Cultural Quarter venues is estimated to be approximately £108.4 million. Once deductions are made to account for deadweight and trips not attributed to the venue, the gross expenditure figure is reduced to a net figure of £43 million direct visitor expenditure

1.2.2 In addition to the direct net economic effects of visitor expenditure, the spending of visitors has a range of indirect and induced effects on the local economy – the multiplier effect. Using this approach an additional £12.8 million is generated through indirect impacts and £8.3 million through induced impacts.

1.2.3 Total net impact of visitor expenditure is estimated to be £64 million.

1.2.4 The direct, indirect and induced expenditure supports 1,164 FTE jobs in Brighton & Hove.

1.2.5 The cultural venues themselves spend a significant proportion of their revenue in Brighton & Hove, and in so doing support local jobs and businesses. It is estimated approximately £7 million is spent by the venues in total on wages of staff from the local area and on the purchase of goods and services from local businesses.

1.2.6 However, earned income which comes from visitors through the latter's purchase of tickets, merchandise, and food and drink is already accounted for in the calculation of visitor expenditure in the area. Venue expenditure from visitor derived revenue is thereby discounted in this analysis. Revenue spent in the area which is also derived from grants from Brighton & Hove City Council is also discounted as this expenditure is deadweight.

1.3 Visitor profile

1.3.1 Trip type was found to be similar among Brighton Museum and Royal Pavilion visitors. A significant proportion – 44% of Museum visitors and 60% of all Pavilion visitors were on an overnight visit staying away from home. A quarter of Museum visitors (25%) and Pavilion visitors (23%) were tourism day visitors. These are same-day visitors who live outside Brighton & Hove. The respective proportion of tourism day visitors for the Pavilion was 25%.

1.3.2 The Dome and the Theatre Royal appear to attract relatively few overnight visitors compared to the other two venues. Most Dome and Theatre visitors were found to be either day visitors or local residents.

1.3.3 Over half of all visitors attending the Brighton Festival (58%) were found to be local residents. A quarter were day visitors and 14% were on an overnight trip.

1.3.4 At all venues a small proportion of visitors fell into the 'Other' category. In most instances these visitors were language students, visitors on education-related trips or business-related trips, travelling from residences outside Brighton & Hove for the day.

1.3.5 The vast majority of visitors at each of the venues were found to be UK residents. Compared to the other three venues, a far higher proportion of overseas visitors were encountered at the Royal Pavilion (accounting for 27% of all visitors interviewed). The Brighton Museum also attracted a significant volume of visitors from overseas (accounting for 15% of all visitors interviewed).

1.4 Trip features

1.4.1 Around 38% of the total sample (684 visitors out of the 1,780 in the sample) visited or planned to visit other visitor attractions in Brighton. Overall, based on results for the total sample, Brighton Pier was the most popular other attraction visited or planned to be visited (67% of total sample).

1.4.2 A significant number of visitors (23% of the total sample) mentioned a number of other places visited which were not listed on the questionnaire, including locations outside Brighton.

1.4.3 The vast majority of visitors interviewed at the Dome (93%), the Theatre Royal (83%) and the Brighton Festival (82%) stated that their main reason for being in Brighton was to visit that particular venue. Visitors interviewed at the Museum and the Pavilion provided more mixed responses.

1.4.4 Visitors who replied that the venue visited was not the main reason for being in Brighton that day (694 visitors out of the 1,780 interviewed, representing 39% of the overall sample), were asked to indicate what their main reason for visiting Brighton was. Overall, the most popular reason for visiting Brighton was that they were there on holiday or for a leisure day out.

1.5 Visitor expenditure

1.5.1 Based on average spend per head by visitor type, the survey found that overnight visitors spent between £228.16 per person per trip (Brighton Pavilion) to £362.66 per person per trip (Brighton Festival).

1.5.2 Tourism day visitors spent on average £23.62 per person per day (Brighton Museum) to £37.35 per person per day (Theatre Royal).

1.5.3 Local residents spent on average £11.89 per person per day (Brighton Museum) to £28.16 per person per day (Theatre Royal).

2 Introduction

2.1 Study background

2.1.1 Where they have taken place, investigations of the economic significance of the cultural sector have provided valuable input to local and central government decision-making regarding the support for cultural venues, festivals and activities. Significant evidence is required to quantify economic benefits so that the sector can justify requests for funds from public sources, based on reliable information that demonstrates return on investment and value for money.

2.1.2 Brighton & Hove City Council commissioned TSE Research to undertake a study to determine the economic impact of the key venues within Brighton's cultural quarter on the economy of Brighton & Hove. The cultural quarter venues included the Brighton Dome, the Brighton Festival, the Brighton Museum & Art Gallery, the Royal Pavilion, and the Theatre Royal.

2.1.3 The specific objectives of the study were as follows:

- To increase understanding of the combined impacts of the individual venues within the cultural quarter,
- To assess potential economic impact of cultural quarter venues on the local economy.
- To demonstrate the impacts clearly and show supporters and stakeholders (current and future) the value of the work undertaken, and the benefits created by their investment
- To inform future development strategies and support plans for future investment.
- To establish a framework for the ongoing evaluation of the economic impact of the Cultural Quarter venues.

2.1.4 The study involved gathering key data from visitors via a face-to-face exit survey at each venue to establish the income generated for local businesses through the purchase of local goods and services, and the number of jobs supported in the local economy.

2.1.5 We are entirely aware that this study is one-dimensional. It focuses only on the direct and indirect impact of the venues on the local economy. The cultural and creative sector deliver highly significant social and educational services which cannot be captured in economic impact studies. It would therefore be a mistake to measure a venue's entire performance against the single criterion of measurable economic benefit from visitors.

2.1.6 The economic impacts presented in this report should ideally be assessed along with other measures of performance including the value placed on the services provided by local residents and visitors from outside the area.

2.2 Economic impact assessment

2.2.1 The venues deliver direct economic benefits for the local economy, through (but not limited to) the spending by the visiting public. Many others contribute to the overall economic impact such as the venues themselves (through spending earned income in the local area and paying salaries to local residents) as well as performers/artists, production companies, and journalists through their spending on restaurants, hotels, and transport.

2.2.2 However, in order to qualify as genuine economic impact visitor expenditure (as well as other visitors such performers/artists, production companies, and journalists) must: originate from outside Brighton & Hove (i.e. be 'new' money); be incurred with local businesses; and, not be expatriated from the local economy ('leaked out').

2.2.3 Economic impact studies routinely discard the expenditure of people living locally since this expenditure is assumed to be a substitution of their spending which would have occurred elsewhere in the local economy regardless of the venues. Consequently, expenditure by Brighton & Hove residents is exempt from the *net economic impact* calculations and is classed as 'deadweight' under the terms of the research. Local resident expenditure is however included in the *gross visitor expenditure* estimates to give the venues some insight into the importance of this market[1].

2.2.4 Furthermore, the net economic impact is also based on the expenditure of those non-local visitors who were motivated to visit the area as a *direct result* of the venues; thus, the money they spend can be attributed to the venues themselves. However, if they are in Brighton & Hove for other reasons and happen to visit one of the venues whilst there, their expenditure cannot be attributed to the venue.

2.2.5 In this context, economic impact is defined as the *net change* in the local economy that is directly attributable to the cultural venues. The significance of this definition is that it measures the 'additionality' of the venues, which is recognised best practice in the Treasury Green Book[2] and DCMS White Book[3].

2.2.6 Ideally, the economic impact of the venues would also be assessed by tracking expenditures made by the venues themselves including their employees, visitors and suppliers through the economy, to identify the impact on other local firms and the effects in supporting incomes and employment. However, this is a very data hungry exercise, which is impossible without a major (and costly) study.

2.2.7 An alternative approach involves the application of standard multipliers that assess the direct, indirect and induced effects of expenditures on overall income and employment in the local economy. Standardised economic multipliers for the local level are provided by the English Partnerships Additionality Guide[4]. In this study we draw on the Guide but also use our own multipliers developed over a number of years (the Cambridge Model[5] which measures the local economic impact of tourist spending).

2.2.8 It is also worth making a note about potential displacement effects. One could argue that the cultural venues draw some visitors away from other attractions in the City. Regrettably we did not include any specific questions in the visitor survey to address this. However, we believe that as these venues represent a unique cultural service not offered elsewhere in Brighton & Hove, the level of displacement is likely to be very low.

2.2.9 Finally, we should stress that as the focus of this study is on those key venues located in the cultural quarter of the city, it did not include the many other museums and galleries

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[1] *A small proportion of local resident expenditure is included in the net additional spend figure for the Brighton Festival. This is based on the argument that this expenditure will have migrated outside Brighton & Hove if it was not for the presence of the Festival. See Section 5 on Economic Impact.*

[2] *http://www.hm-treasury.gov.uk/green_book.htm*

[3] *http://www.culture.gov.uk/reference_library/publications/3690.aspx*

[4] *Additionality Guide. A standard approach to assessing the additional impact of interventions. Method statement. Third Edition. English Partnerships.*

5 The Cambridge Model is a computer-based mathematical model developed to provide indicative estimates of the volume, value and economic impact of tourism on a county or district basis. It is tourism specific and draws on the combined experience of Geoff Broom Associates and the English Regional Tourist Boards. The model utilises a standard methodology capable of application across the UK, and thus offers the potential for direct comparisons with similar destinations throughout the country.

located in Brighton & Hove. We also emphasis to readers that the economic impact estimates generated by this study for the Brighton Festival is not strictly comparable to the figures produced for the 2004 Festival. The 2004 Festival included a number or large outdoor events, which are now part of the Brighton Fringe and not organised by Brighton Dome & Festival Limited. There are also methodological differences between the 2004 study and ours which limit direct comparability[6].

2.3 Visitor survey

2.3.1 The main method of data gathering has been a visitor survey at each of the venues, which asked visitors, among other things:

- How far they had travelled to visit the venue;
- Whether they were on a day trip or staying in the area;
- How many nights, if any, they were staying in the area;
- The size of their party;
- The importance of the venue in encouraging them to visit the area;
- Whether they had purchased various items locally as part of their visit;
- How much they had spent on these different items.

2.3.2 A copy of the Visitor Questionnaire is provided in Appendix 1.

2.3.3 The results where used to estimate expenditures in the local economy by non local day trippers and staying visitors.

2.3.4 The sample achieved at each venue is presented in Table i below.

Table i: Interviews by site		
Base (All visitors)	1780	
Brighton Dome	232	13%
Brighton Festival	371	21%
Brighton Museum and Art Gallery	463	26%
Royal Pavilion	485	27%
Theatre Royal	229	13%

2.3.5 Interview sessions were spread across weekdays and weekends to ensure a representative sample of visitors were interviewed. The timing and dates of interview sessions for the Brighton Dome and Theatre Royal were also informed by the calendar of shows and concerts held at the two venues.

2.3.6 The survey was carried out between September 2010 and 31 August 2011 to provide a full 12 month of data. The exception was the survey carried out for the Brighton Festival. This survey took place over three weeks in May 2011.

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[6] *An independent study was commissioned to establish the economic impact of the 2004 Brighton Festival. The study was carried out by Sussex Arts Marketing. There are a number of key methodological differences between the 2004 study and ours. The latter study included a number of large outdoor events which are now part of the Brighton Fringe and thus were not included in our study. For this reason the 2011 attendance figures are considerably lower than those of 2004. The other major difference is that as far as we understand the 2004 did not discount deadweight or consider additionality. For example, all visitors were included in the calculation regardless as to whether their main motivation for being in Brighton was the Festival or not.*

2.3.7 All sample surveys are subject to statistical error that varies with the sample size. Table ii presents the margins within which one can be 95% certain that the true figures will lie (assuming the sample is random).

2.3.8 This means, for example, that for the Brighton Dome, we can be 95% certain that, if 50% of all visitors surveyed are found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies within the range of +/- 6.4%, i.e. between 43.6% and 56.4%. The margins of error shown below should be considered when interpreting the results contained in this report.

Table ii: Margin of error at 95% confidence limit

	Plus or minus	
Base (All visitors)	1780	
Brighton Dome	232	6.4%
Brighton Festival	371	5.1%
Brighton Museum and Art Gallery	463	4.6%
Royal Pavilion	485	4.4%
Theatre Royal	229	6.5%

2.4 Presentation of results

2.4.1 All results are presented in tabulated form with commentary. Most results are cross-tabulated by visitor type to provide insights into the differences between overnight visitors, day visitors and those who live in Brighton & Hove.

2.4.2 Section 3 to 5 presents the results from the survey. Section 3 begins by presenting the results on the profile of visitors. Section 4 looks at key features of the visit to the venue. Section 5 examines visitor expenditure for all venues and assesses combined gross and net economic impact of the Cultural Quarter venues.

3 Survey findings: Visitor profile

3.1 Visitor type

3.1.1 Trip type was found to be similar among Brighton Museum and Royal Pavilion visitors. A significant proportion; 44% of Museum visitors and 60% of all Pavilion visitors were on an overnight visit staying away from home. A quarter of Museum visitors (25%) and Pavilion visitors (23%) were tourism day visitors. These are same-day visitors who live outside Brighton & Hove. The respective proportion of tourism day visitors for the Pavilion was 25%.

3.1.2 The Dome and the Theatre Royal appear to attract relatively few overnight visitors compared to the other two venues. Most Dome and Theatre visitors were found to be either day visitors or local residents.

3.1.3 Over half of all visitors attending the Brighton Festival (58%) were found to be local residents. A quarter were day visitors and 14% were on an overnight trip.

3.1.4 At all venues a small proportion of visitors fell into the 'Other' category. In most instances these visitors were language students, visitors on education-related purposes or business visitors, travelling from residences outside Brighton & Hove for the day.

Table 1: Visitor type - by venue

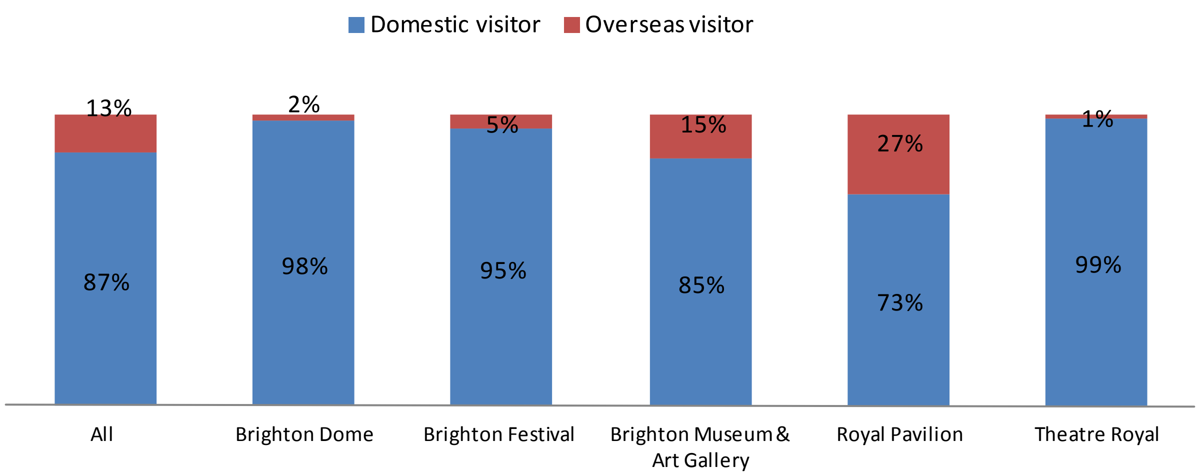
	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	1,780	232	371	463	485	229
Overnight visitor	33%	9%	14%	44%	60%	10%
Day visitor	29%	43%	24%	25%	23%	45%
Local resident	32%	47%	58%	24%	9%	42%
Other	5%	1%	4%	8%	8%	2%

Note: 'Other' visitors are made up of language students and other on educational visits and business visitors not residing in Brighton & Hove.

3.2 Visitor origin

3.2.1 The vast majority of visitors at each of the venues were found to be UK residents. Compared to the other three venues, a far higher proportion of overseas visitors were encountered at the Royal Pavilion (accounting for 27% of all visitors interviewed). The Brighton Museum also attracted a significant volume of visitors from overseas (accounting for 15% of all visitors interviewed).

Figure 1: Visitor origin



3.2.2 Table 2a to Table 2e list the 5 top location of residence for domestic visitors. The first column presents the aggregated results for the county in which visitors reside and include local residents of Brighton & Hove. The second and third column presents the results on where visitor residing outside Brighton & Hove came from.

3.2.3 The aggregated data reveal that for three venues: the Brighton Dome, the Brighton Festival, and the Theatre Royal, a significant proportion of visitors came from East Sussex (these three venues had the highest proportion of local residents within the sample of visitors).

3.2.4 Overnight visitors came from all parts of the UK; a significant proportion of overnight visitors for all venues came from London. Day visitors were most often visiting from other parts of East Sussex, from districts in West Sussex and from London Boroughs.

Table 2a: Brighton Dome – top five visitor origins					
All visitors incl. residents		Overnight visitor		Tourism day visitor	
East Sussex	62%	Hampshire	16%	West Sussex	42%
West Sussex	19%	London	11%	East Sussex	30%
Surrey	4%	Cambridgeshire	11%	Surrey	8%
London	3%	East Sussex	5%	London	5%
Hants	3%	Surrey	5%	Kent	4%

Table 2b: Brighton Festival– top five visitor origins					
All visitors incl. residents		Overnight visitor		Tourism day visitor	
East Sussex	71%	London	20%	East Sussex	38%
West Sussex	9%	Cheshire	8%	West Sussex	35%
London	7%	Essex	5%	London	18%
Cheshire	1%	Hampshire	5%	Surrey	3%
Dorset	1%	Hertfordshire	5%	Hampshire	2%

Table 2c: Brighton Museum – top five visitor origins					
All visitors incl. residents		Overnight visitor		Tourism day visitor	
East Sussex	34%	London	12%	West Sussex	27%
London	12%	Somerset	6%	London	23%
West Sussex	9%	Kent	5%	East Sussex	19%
Kent	4%	Essex	4%	Surrey	7%
Somerset	3%	Suffolk	4%	Kent	5%

Table 2d:Royal Pavilion – top five visitor origins					
All visitors incl. residents		Overnight visitor		Tourism day visitor	
East Sussex	17%	London	7%	London	21%
London	11%	Kent	6%	West Sussex	17%
Kent	6%	Essex	4%	East Sussex	13%
Surrey	6%	Cheshire	4%	Surrey	13%
West Sussex	5%	Somerset	4%	Hants	10%

Table 2e:Theatre Royal – top five visitor origins					
All visitors incl. residents		Holiday maker		Tourism day visitor	
East Sussex	59%	London	20%	West Sussex	55%
West Sussex	25%	West Midlands	15%	East Sussex	33%
Kent	4%	Kent	10%	Kent	5%
London	3%	Hampshire	10%	Hampshire	4%
Hampshire	3%	East Sussex	5%	London	2%

3.2.5 Overall 13% of all visitors were from overseas. Foreign visitors represented a wide range of countries, the most dominate of which were Germany, Canada, the USA and Australia.

3.2.6 A full list of all countries of residence is presented below.

Overseas country of residence:

Brighton Dome	
	4
Germany	50%
Canada	25%
S. Arabia	25%

Brighton Festival	
	17
U.S.A.	18%
Germany	18%
Finland	12%
Sweden	12%
Australia	12%
Canada	6%
Rep. of Ireland	6%
Spain	6%
Mexico	6%
Taiwan	6%

Brighton Museum	
	67
Germany	12%
France	9%
Netherlands	9%
Australia	9%
U.S.A.	7%
Italy	7%
Switzerland	4%
Belgium	3%
Spain	3%
Sweden	3%
Norway	3%
Japan	3%
Russia	3%
Canada	1%
Austria	1%
Rep. of Ireland	1%
Luxembourg	1%
Turkey	1%
Israel	1%
Czech Rep.	1%
Argentina	1%
Chile	1%
Mexico	1%
China	1%
Korea	1%
Croatia	1%
Estonia	1%
Latvia	1%
Ukraine	1%

Royal Pavilion	
	132
Australia	16%
U.S.A.	14%
France	14%
Germany	9%
Canada	6%
Netherlands	6%
Sweden	5%
Belgium	4%
Switzerland	4%
Austria	2%
Rep. of Ireland	2%
Italy	2%
Spain	2%
Norway	2%
Brazil	2%
S. Africa	2%
Japan	2%
Finland	1%
Greece	1%
Cyprus	1%
Hungary	1%
Hong Kong	1%
New Zealand	1%
China	1%
Malaysia	1%
Thailand	1%
India	1%
Philippines	1%

Theatre Royal	
	3
Canada	33%
Qatar	33%
Australia	33%

3.3 Visitor age

3.3.1 The visitor age data is based on the ages of each member of the visiting party and not just the respondent interviewed (this includes all adults and children accompanying the respondent on their trip).

3.3.2 Based on this data, the figure below clearly shows that the Museum, Pavilion and Theatre attract far more visiting parties with children 15 years and under than the Dome and the Brighton Festival.

3.3.3 The age bands of adult visitors was found to be spread across the ranges, though overall groups containing young adults – 16 years to 25 years were lower in numbers, accounting for only 10% of all visitors.

Table 3: Visitor type - by venue

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	1,780	232	371	463	485	229
Total 0-15 years	17%	7%	12%	21%	22%	17%
Total 16-24 years	10%	12%	6%	14%	10%	8%
Total 25-34 years	13%	16%	14%	14%	12%	8%
Total 35-44 years	12%	16%	13%	6%	10%	18%
Total 45-54 years	13%	16%	16%	10%	10%	17%
Total 55-64 years	20%	16%	23%	18%	22%	18%
Total 65-74 years	10%	9%	12%	10%	10%	10%
Total 75+ years	5%	8%	3%	7%	3%	3%

3.4 Visitor group size & composition

3.4.1 Based on the total sample of visitors interviewed, the mean average group size was 2.56 people, ranging from 2.80 people for visiting parties at the Pavilion to 2.18 people for visiting parties attending the Brighton Festival.

3.4.2 For all venues, the most popular group composition was two adults. Overall, 54% of all visiting parties consisted of two adults (see Table 5).

3.4.3 Overall half of all visitors (58%) were visiting with a family member, in most cases a spouse or partner (see Table 6).

Table 4: Average group size – by venue

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Total children	0.32	0.16	0.20	0.36	0.38	0.48
Total adults	2.24	2.21	1.98	2.24	2.43	2.30
Total people	2.56	2.37	2.18	2.60	2.80	2.77

Table 5: Visitor group composition –by venue						
	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
	1,780	232	371	463	485	229
1 adult (no children)	12%	10%	23%	11%	10%	6%
2 adults (no children)	54%	65%	55%	50%	49%	60%
3 adults (no children)	8%	10%	5%	8%	9%	6%
4 adults (no children)	7%	6%	3%	8%	7%	10%
5 or more adults	2%	2%	1%	2%	3%	2%
1 adult & 1 child	2%	2%	1%	2%	2%	3%
1 adult & 2 or more children	2%	2%	1%	5%	2%	1%
2 adults & 1 child	4%	1%	4%	5%	5%	3%
2 adults & 2 or more children	4%	1%	3%	4%	7%	7%
3 adults & 1 child	2%	0%	1%	2%	3%	1%
3 adults & 2 or more children	1%	0%	1%	2%	1%	2%
4 or more adults & 1 or more children	2%	0%	2%	2%	2%	0%

Table 6: Social make-up of group						
	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
	1,780	232	371	463	485	229
Alone	12%	10%	23%	10%	7%	6%
With family	58%	56%	48%	56%	65%	63%
With friends	20%	28%	25%	22%	12%	21%
With family and friends	6%	6%	4%	6%	8%	8%
Club/organised group	4%	0%	0%	6%	7%	1%
Other	0%	0%	0%	1%	0%	1%

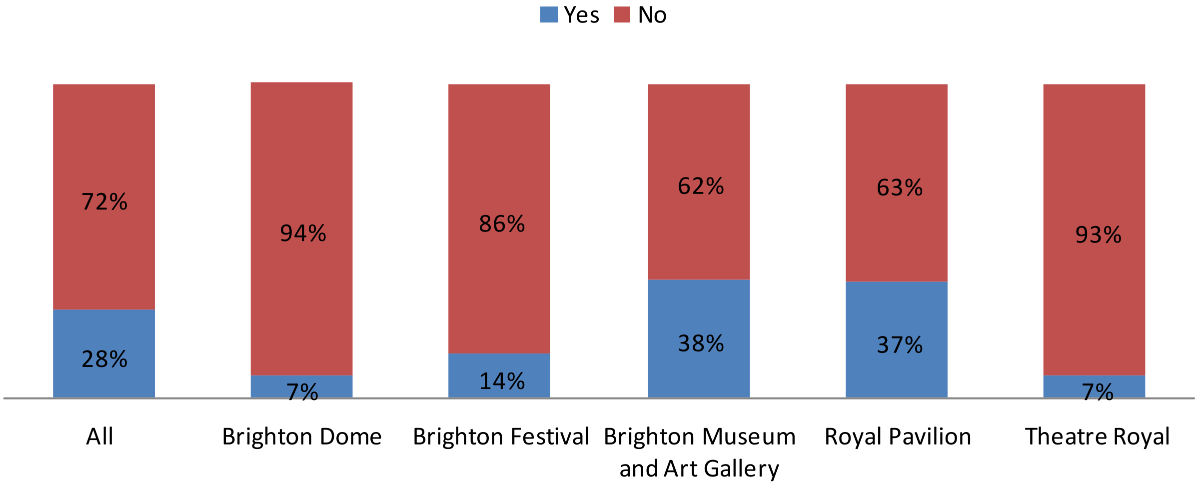
4 Survey findings: Trip features

4.1 Frequency of visits

4.1.1 All visitors excluding local residents were asked whether they were visiting Brighton for the first time. The vast majority of visitors were found to be return visitors – those who have visited Brighton previously. The proportion of return visitors was highest for the Dome and the Theatre Royal (both 93%), followed by the Brighton Festival (86%).

4.1.2 The Museum and Pavilion drew far more first time visitors. Thirty-eight per cent of Museum visitors and 37% of Pavilion visitors were found to be visiting Brighton for the first time.

Figure 2: Whether first time visitor



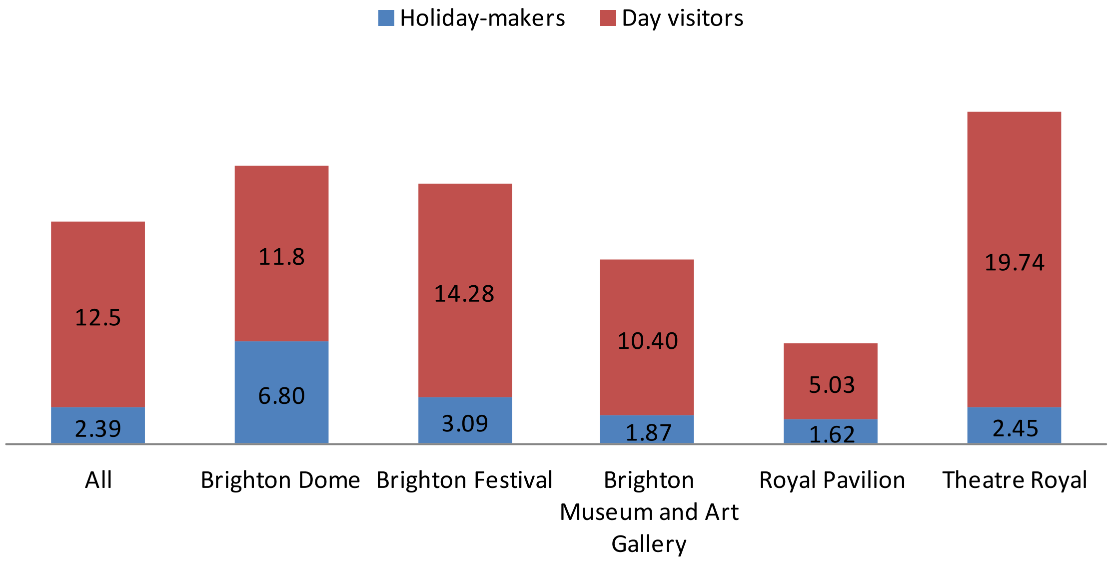
4.1.3 Out of the total sample of visitors (excluding local residents), 49% replied that they intended to visit Brighton again over the next 12 months. This ranged from 82% of Theatre Royal visitors at the top end to 27% of Pavilion visitors at the low end.

Table 7: Whether visit again in next 12 months– by venue

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base (non-residents)	1196	121	153	351	441	130
Yes	49%	74%	75%	44%	27%	82%
No	51%	26%	25%	56%	73%	18%

4.1.4 On average, overnight visitors planning on visiting Brighton again, expected to visit 2.39 times over the next 12 months, whereas day visitors expected to visit on average 12.5 times over the next 12 months.

Figure 3: Average number of visits over next 12 months: results for holiday makers and tourism day visitors



4.2 Overnight trip location stayed at

4.2.1 The majority of visitors staying overnight (non-locals) were found to be staying in Brighton.

Location of accommodation base:

Brighton Dome		**Brighton Festival**		**Brighton Museum**		**Royal Pavilion**		**Theatre Royal**	
	23		63		229		328		26
Brighton	65%	Brighton	79%	Brighton	66%	Brighton	57%	Brighton	77%
Hove	9%	Hove	6%	Eastbourne	11%	Eastbourne	7%	Hove	8%
Burgess Hill	9%	London	6%	London	7%	London	7%	Henfield	4%
Balcombe	4%	Chichester	2%	Laughton	1%	Worthing	3%	Burgess Hill	4%
Newhaven	4%	Worthing	2%	Haywards Heatl	1%	Hove	2%	Hastings	4%
Hassocks	4%	Newhaven	2%	Hove	1%	Chichester	2%	Chichester	2%
Hurstpierpoint	4%	Hampshire	2%	Worthing	1%	Hastings	2%		
		Canterbury	2%	Hastings	1%	Arundel	1%		
				Lewes	1%	Hailsham	1%		
				Seaford	1%	Henfield	1%		
				Newhaven	1%	Shoreham	1%		
				Hurstpierpoint	1%	Ditchling	1%		
				Winchester	1%	Littlehampton	1%		
				Selsey	1%	Bexhill	1%		
						Rye	1%		
						Lewes	1%		
						Seaford	1%		
						Uckfield	1%		
						Pevensey Bay	1%		
						Wittering	1%		
						Aylesbury	1%		
						Crawley	1%		

4.3 Overnight trip accommodation type

4.3.1 Of the total sample of overnight visitors, 59% stayed overnight in a hotel. The second most popular accommodation (albeit significantly smaller in volume) was the home of a friend or relative (15%), followed by B&B accommodation (13%).

Table 8: Type of accommodation stayed at – by venue						
	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
	23	63	229	328	26	23
Hotel	59%	47%	38%	60%	64%	60%
Home of friend or relative	15%	33%	44%	12%	9%	25%
B&B/Guest house	13%	7%	6%	13%	16%	10%
Self catering	3%	7%	6%	3%	2%	0%
Caravan/Camping	3%	0%	0%	2%	5%	5%
Other	3%	7%	6%	3%	1%	0%
Youth hostel	2%	0%	0%	3%	1%	0%
University accommodation	1%	0%	0%	1%	0%	0%
Pub/Inn	0%	0%	0%	1%	0%	0%
Boat/Yacht	0%	0%	0%	1%	0%	0%
Holiday home/Timeshare	0%	0%	0%	1%	0%	0%

4.4 Overnight trip average length of stay

4.4.1 On average, overnight visitors spent 4.85 nights on their trip (this includes both visitors staying overnight in Brighton and those staying overnight elsewhere). This ranged from an average of 6.23 nights among Museum visitors at the top end to an average of 3.57 nights among Pavilion visitors at the lower end.

Table 9: Avg. length of trip – by venue	
All	4.85
Brighton Dome	4.00
Brighton Festival	5.52
Brighton Museum	6.23
Royal Pavilion	3.57
Theatre Royal	5.64

4.5 Awareness of the venue

4.5.1 Most visitors did not find out about venue from the sources listed on the questionnaire. Overall, out of the total sample, 59% mentioned 'other' sources (see Table 10a below).

4.5.2 Of the sources of awareness listed on the questionnaire, 'Word of mouth' was the most popular response.

Table 10a: How found out about the venue – aggregated results

	All visitors	Overnight visitor	Tourism day visitor	Local resident	Other
	1604	538	459	515	92
Other	59%	54%	59%	66%	50%
Word of mouth	25%	28%	24%	22%	36%
'Visit Brighton' website	4%	8%	3%	2%	5%
Other website	3%	3%	5%	1%	2%
Venue flyer/leaflet	3%	2%	2%	3%	4%
Venue website	2%	1%	3%	2%	0%
TV/Radio	2%	5%	1%	1%	1%
Newspaper/Magazine	2%	2%	3%	3%	0%
Posters	1%	1%	0%	1%	1%
E-mail announcements	1%	0%	1%	1%	0%
Other flyer/leaflet	1%	0%	1%	1%	1%
Signage	0%	0%	0%	0%	0%
Banner	0%	0%	0%	0%	0%

Table 10b: How visitors found out about the Brighton Dome

	All visitors	Overnight visitor	Tourism day visitor	Local resident	Other
	203	20	89	92	2
Other	48%	10%	48%	57%	0%
Word of mouth	19%	50%	16%	15%	0%
Other website	8%	20%	13%	1%	0%
Venue website	7%	15%	8%	4%	0%
Venue flyer/leaflet	6%	0%	2%	11%	50%
Newspaper/Magazine	4%	0%	6%	3%	0%
'Visit Brighton' website	3%	15%	2%	1%	0%
Posters	2%	0%	1%	3%	50%
E-mail announcements	2%	0%	2%	2%	0%
TV/Radio	1%	5%	1%	0%	0%
Other flyer/leaflet	1%	0%	1%	2%	0%
Banner	0%	0%	0%	1%	0%

Table 10c: How visitors found out about the Brighton Festival					
	All visitors	Overnight visitor	Tourism day visitor	Local resident	Other
	370	53	89	215	13
Other	65%	62%	63%	66%	69%
Word of mouth	23%	25%	25%	22%	31%
'Visit Brighton' website	2%	2%	3%	2%	0%
Venue website	2%	0%	1%	3%	0%
Other website	2%	2%	6%	1%	0%
E-mail announcements	2%	2%	2%	2%	0%
Newspaper/Magazine	2%	0%	1%	4%	0%
Venue flyer/leaflet	2%	0%	2%	2%	0%
TV/Radio	1%	2%	0%	1%	0%
Posters	0%	2%	0%	0%	0%
Signage	0%	2%	0%	0%	0%
Banner	0%	2%	0%	0%	0%
Other flyer/leaflet	0%	0%	0%	0%	0%

Table 10d: How visitors found out about the Brighton Museum					
	All visitors	Overnight visitor	Tourism day visitor	Local resident	Other
	413	194	97	88	34
Other	63%	62%	61%	75%	38%
Word of mouth	23%	20%	24%	24%	44%
'Visit Brighton' website	7%	10%	4%	2%	9%
Newspaper/Magazine	3%	3%	2%	5%	0%
Venue flyer/leaflet	3%	3%	3%	2%	3%
Other website	2%	3%	2%	1%	3%
Posters	1%	1%	1%	0%	0%
Other flyer/leaflet	1%	1%	2%	0%	3%
Venue website	0%	1%	1%	0%	0%
TV/Radio	0%	0%	1%	0%	0%
Signage	0%	1%	1%	0%	0%

Table 10e: How visitors found out about the Royal Pavilion					
	All visitors	Overnight visitor	Tourism day visitor	Local resident	Other
	422	247	96	41	38
Other	56%	51%	66%	66%	55%
Word of mouth	31%	33%	28%	29%	32%
TV/Radio	8%	11%	3%	5%	3%
'Visit Brighton' website	5%	6%	3%	5%	5%
Venue flyer/leaflet	2%	1%	2%	2%	5%
Venue website	1%	0%	3%	2%	0%
Other website	1%	2%	1%	0%	3%
Newspaper/Magazine	1%	2%	0%	0%	0%
Other flyer/leaflet	0%	0%	1%	0%	0%

Table 10f: How visitors found out about the Theatre Royal					
	All visitors	Overnight visitor	Tourism day visitor	Local resident	Other
	196	24	88	79	5
Other	58%	21%	59%	68%	60%
Word of mouth	24%	29%	25%	22%	40%
Other website	4%	8%	5%	1%	0%
Newspaper/Magazine	4%	0%	5%	4%	0%
'Visit Brighton' website	3%	21%	0%	1%	0%
Venue website	3%	8%	2%	1%	0%
Venue flyer/leaflet	3%	13%	2%	1%	0%
Posters	1%	0%	0%	1%	0%
TV/Radio	1%	0%	1%	0%	0%
Other flyer/leaflet	1%	0%	1%	0%	0%

4.5.3 Visitors providing ‘Other’ responses where invited to state what these were. The responses have been grouped and presented below. Finding out through simply walking past, through previous visits and in the case of the Brighton Festival, through Festival guides and information on the web were the main other sources.

Other ways of finding out about the venue:

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	947	97	239	259	238	114
Driving/Walking past	32%	15%	14%	63%	28%	19%
Previous knowledge/visit	32%	72%	7%	22%	30%	75%
Festival guidebook/website	18%	2%	69%	0%	0%	0%
School/University	8%	6%	2%	5%	21%	4%
Guidebook/brochure	5%	1%	3%	4%	11%	0%
Language school	3%	1%	2%	0%	7%	2%
Tourist Information Centre	1%	1%	0%	2%	3%	0%
Maps	1%	0%	0%	5%	0%	0%
Historical books	0%	0%	1%	0%	1%	0%
Burma campaign	0%	0%	1%	0%	0%	0%
Involved with/work for show/event/venue	0%	0%	1%	0%	0%	0%
TV documentary	0%	0%	0%	0%	0%	0%
Flickr	0%	0%	0%	0%	0%	0%
Ticketmaster	0%	1%	0%	0%	0%	0%

4.6 Other venues/attractions visited

4.6.1 Around 38% of the total sample (684 visitors out of the 1,780 in the sample) visited or planned to visit other visitor attractions in Brighton during their trip. Overall, based on results for the total sample, Brighton Pier was the most popular other attraction visited or planned to be visited (67% of total sample).

4.6.2 A significant number of visitors (23% of the total sample) mentioned a number of other places visited which were not listed on the questionnaire, including locations outside Brighton. Results are presented overleaf.

Table 12: Other attractions visited					
	All	Brighton Dome	Brighton Museum	Royal Pavilion	Theatre Royal
Base	684	28	295	337	24
Brighton Pier	67%	54%	69%	67%	38%
Royal Pavilion	24%	25%	52%	0%	21%
Other attractions	23%	21%	20%	23%	42%
Brighton Museum and Art Gallery	17%	18%	1%	31%	17%
Brighton Marina	16%	0%	14%	17%	38%
Brighton Sea Life Centre	10%	7%	8%	10%	13%
Brighton Dome	5%	14%	5%	4%	13%
Volks Electric Railway	5%	4%	5%	5%	8%
Brighton Fishing Museum	3%	0%	3%	3%	0%
Brighton Toy and Model Museum	3%	4%	3%	2%	0%
City Sightseeing, Brighton Tour	3%	0%	3%	3%	4%
Theatre Royal Brighton	3%	0%	2%	3%	0%
Booth Museum of Natural History	2%	4%	2%	1%	4%
Hove Museum and Art Gallery	2%	4%	3%	2%	0%
Concorde 2	1%	0%	1%	0%	0%
Komedia	1%	4%	0%	2%	0%
Preston Manor	1%	0%	1%	1%	4%
Stanmer Rural Museum	0%	0%	0%	0%	0%

Note: Multiple responses permitted so results do not add up to 100%

Other attractions visited:

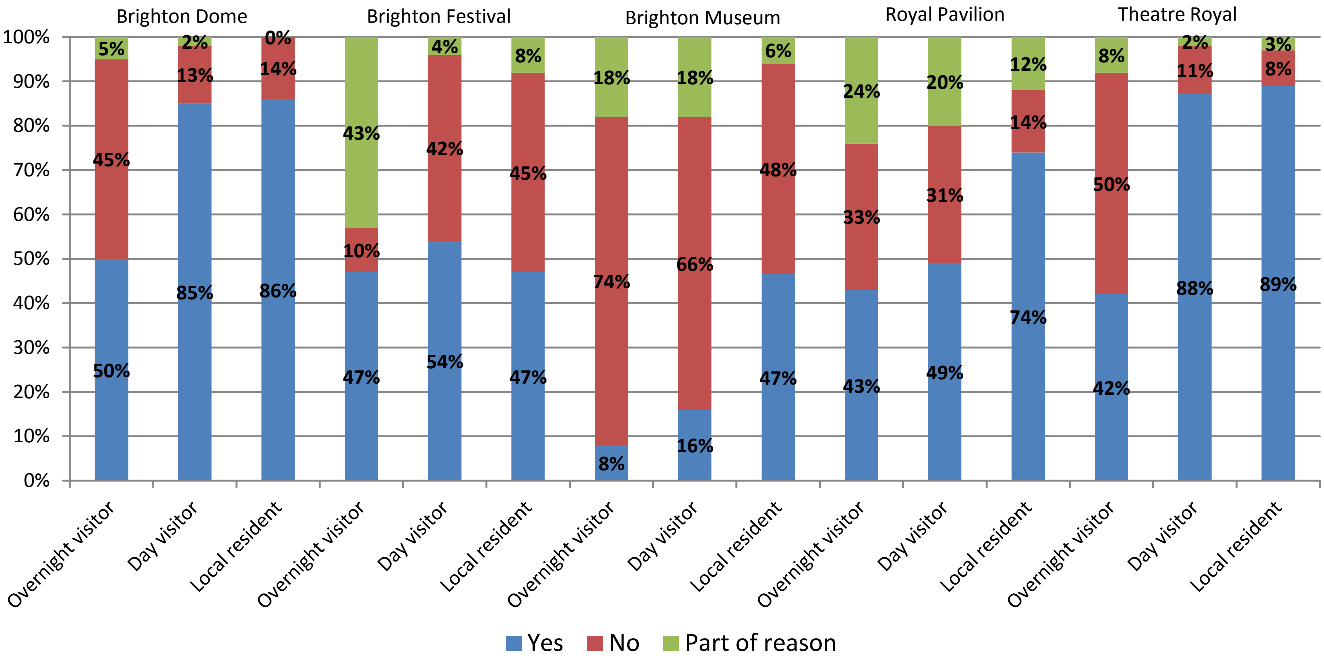
	All	Brighton Dome	Theatre Royal	Royal Pavilion	Brighton Museum	Brighton Festival
Base	204	6	10	79	59	50
The Lanes	59%	50%	50%	85%	73%	6%
Fabrica	14%	0%	0%	3%	0%	52%
The beach	5%	0%	0%	6%	8%	0%
Phoenix Gallery	5%	17%	0%	0%	3%	14%
The library	3%	0%	10%	0%	8%	0%
The ice rink	2%	33%	10%	3%	0%	0%
Brighton Festival event	2%	0%	10%	0%	0%	8%
St Anns Gardens	2%	0%	0%	0%	0%	10%
Fringe venue	2%	0%	0%	0%	0%	10%
Seven Sisters Country Park	1%	0%	0%	1%	3%	0%
Sussex Cricket Ground	1%	0%	10%	3%	0%	0%
Queens Park	1%	0%	0%	0%	2%	2%
Charleston House	1%	0%	0%	1%	0%	2%
Cinema	1%	0%	0%	0%	0%	4%
Photo festival	0%	0%	0%	0%	2%	0%
Sallis Benney Theatre	0%	0%	0%	0%	2%	0%
Boat trip	0%	0%	10%	0%	0%	0%
Race course	0%	0%	0%	0%	2%	0%
Ghost Walk	0%	0%	0%	0%	2%	0%

4.7 Venue as main reason for visiting Brighton

4.7.1 The vast majority of visitors interviewed at the Dome (93%), the Theatre Royal (83%) and the Brighton Festival (82%) stated that their main reason for being in Brighton that day was to visit that particular venue.

4.7.2 Visitors interviewed at the Museum and the Pavilion provided more mixed responses.

Figure 4: Whether venue main reason for trip



4.8 Other main reasons for visiting Brighton

4.8.1 Visitors who replied that the venue visited was not the main reason for being in Brighton that day (694 visitors out of the 1,780 interviewed, representing 39% of the overall sample), were asked to indicate what their main reason for visiting Brighton was. Overall, the most popular reason for visiting Brighton was that they were there on holiday or for a leisure day out.

Table 13: Main reason for visiting Brighton when venue not the main reason – by venue

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	694	38	173	301	150	32
Leisure or holiday visit	43%	21%	12%	54%	63%	22%
To attend a cultural event/attraction	17%	53%	23%	14%	5%	44%
Visiting friends or relatives	15%	21%	14%	13%	18%	25%
Festival event (e.g. food festival)	9%	0%	32%	1%	1%	0%
Business or work	5%	0%	7%	5%	5%	3%
Shopping trip (special or non-regular)	5%	0%	6%	5%	0%	3%
Shopping trip (regular)	2%	0%	3%	2%	5%	3%
Study	2%	5%	2%	3%	2%	0%
Other event	1%	0%	1%	2%	1%	0%

4.8.2 Visitors who replied that the venue visited was *part of the reason* for being in Brighton that day (representing 12% of the overall sample), were asked to indicate what their other main reason for visiting Brighton was.

4.8.3 Once again, 'Leisure or holiday visit' was the most popular response (mentioned by 51% of this group).

Table 14: Main reason for visiting Brighton when venue part of the reason for visiting – by venue

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
	218	4	33	68	107	6
Leisure or holiday visit	51%	0%	21%	49%	66%	0%
To attend a cultural event/attraction	17%	0%	18%	29%	6%	67%
Visiting friends or relatives	11%	25%	21%	9%	8%	0%
Shopping trip (special or non-regular)	10%	50%	0%	0%	12%	33%
Festival event (e.g. food festival)	5%	0%	30%	0%	0%	0%
Business or work	3%	0%	9%	3%	2%	0%
Study	3%	25%	0%	3%	3%	0%
Shopping trip (regular)	1%	0%	0%	6%	3%	0%
Other	0%	0%	0%	1%	0%	0%

4.9 Overall trip enjoyment

4.9.1 Overall trip enjoyment was found to be very high. Out of an average score of 1 to 5, where 5 indicates the highest level of enjoyment, venue visitors provided an average score of 4.43.

4.9.2 Enjoyment levels were found to be high among visitors at each of the five venues. Enjoyment was highest among Pavilion visitors, which received an average score of 4.67 out of 5.00.

Table 15: Overall trip enjoyment - by venue

	All	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	515	87		162	212	54
Mean	4.43	4.23	4.33	4.37	4.67	4.25
Very high	53%	40%	47%	47%	71%	42%
High	38%	44%	42%	44%	26%	44%
Average	8%	13%	9%	9%	3%	12%
Low	1%	2%	2%	0%	0%	1%
Very low	0%	1%	1%	0%	0%	1%

4.9.3 Visitors were invited to comment on what they most liked about their visit to the venue and what, if anything, they found disappointing or in need of improvement. Individual comments were reviewed and where several similar comments were encountered, these were grouped into specific themes.

4.9.4 Overall 92% of the sample mentioned things they particularly enjoyed about the venue, with the top responses being the attractive presentation of the layout, the ascetics of the building and the general ambience.

4.9.5 Thirty-seven percent of the sample mentioned things which could be improved. The top responses included providing more information, more seats and lowering prices. A full list of responses is provided in Appendix 3.

5 Survey findings: Trip expenditure

5.1 Average trip expenditure

5.1.1 The expenditure data presented in this section is based on averaging out the expenditure among all visitors in the sample to provide a 'spend per head figure'. This includes adding visitors who spent nothing on certain items. For example, not all visitors will have spent money on shopping, but they are still included in the calculation as '£0' spend.

5.1.2 Overnight accommodation spend per head includes visitors who did not spend any money on their accommodation, such a those staying in the home of a friend or relative or in a second home.

5.1.3 Overnight trip spend is full trip spend which has been calculated by multiplying the average day spend by the average number of nights spent in Brighton & Hove. In this study, the whole trip spend is included in the economic impact assessment if the reason given for being on an overnight trip in Brighton & Hove is to visit the venue. For all trips, a weighting adjustment factor[7] is added to those who replied that their reason for being in Brighton & Hove was *partly* due to the venue.

5.1.4 The expenditure data is based on all purchases which are related to the trip (over the whole duration of the trip, so during the day and evening and in the case of overnight visitor, for each night spent in Brighton & Hove) and which took place in Brighton & Hove only. The average spend per head includes expenditure incurred at the venues themselves such as on tickets, merchandise, food and beverages.

5.2 Overnight visitors

5.2.1 The average spend per 24 hours/per trip is relatively similar among those visiting the Museum, Pavilion and the Theatre Royal.

5.2.2 Overall average expenditure per person per trip is highest among Brighton Museum visitors due to the longer average length of the trip.

Table 17: Average trip expenditure per person: Overnight visitors

	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	21*	53	203	291	24*
Eating & drinking	£14.84	£15.16	£13.75	£12.91	£8.37
Shopping	£16.84	£15.12	£10.92	£13.45	£5.68
Entertainment	£19.55	£9.37	£2.91	£7.17	£12.40
Travel/transport	£3.19	£1.50	£1.71	£2.28	£1.72
Accommodation (per head)	£21.73	£24.55	£18.35	£28.10	£23.97
Total average expenditure per night	**£76.15**	**£65.70**	**£47.64**	**£63.91**	**£52.14**
Total average expenditure per trip	**£304.60**	**£362.66**	**£296.80**	**£228.16**	**£294.07**

** Please note small sample base for Dome and Theatre Royal*

[7] *The weighting adjustment is based on the recommended approach used by VisitBritain, DCMS and the National Audit Office for assessing the influence of marketing promotions on tourism trips. According to this recommended approach only additional trips 'definitely' influenced by the promotions are counted in full, while trips that were 'probably' or 'possibly' influenced by the promotion are only counted after applying a weighting factor of 50% and 20% respectively. For simplicity, this survey used the term 'partly influenced' rather than probably and possibly, and a weighting of 35% has been applied to trips said by survey respondents to be partly influenced by the venues.*

Note: This is an average across all overnight visitors incl. those who stayed with friends and relatives or second homes and incurred no accommodation expenditure.

5.3 Average expenditure – Tourism day visitor

5.3.1 Average spend per person per trip among tourism day visitors was found to be highest among Theatre Royal visitors at £37.35 per head, and lowest among Brighton Museum visitors at £23.62 per head.

5.3.2 Brighton Dome and Theatre Royal tourism day visitors spend the largest proportion of their money on entertainment (which includes ticket fees).

Table 18: Average trip expenditure per person: Tourism day visitor

	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	100	89	116	112	104
Eating & drinking	£8.47	£8.61	£10.21	£11.79	£10.50
Shopping	£3.99	£8.55	£10.72	£6.81	£3.51
Entertainment	£21.75	£10.77	£1.71	£7.31	£20.90
Travel/transport	£2.81	£2.03	£0.98	£1.74	£2.44
Total average expenditure	**£37.02**	**£29.96**	**£23.62**	**£27.65**	**£37.35**

5.4 Average expenditure – Local residents

5.4.1 A similar distribution in spend was found among local residents to that of tourism day visitors. Average spend per head was highest among those visiting the Theatre Royal (at £28.16) and lowest among those visiting the Brighton Museum (at £11.89).

Table 19: Average trip expenditure per person: Local resident

	Brighton Dome	Brighton Festival	Brighton Museum	Royal Pavilion	Theatre Royal
Base	109	216	109	42	96
Eating & drinking	£5.78	£6.99	£5.76	£7.85	£6.18
Shopping	£3.32	£11.03	£4.85	£6.35	£4.26
Entertainment	£17.38	£7.00	£0.62	£4.11	£22.35
Travel/transport	£1.31	£1.00	£0.66	£0.89	£1.55
Total average expenditure	**£27.79**	**£26.03**	**£11.89**	**£19.19**	**£28.16**

5.5 Average expenditure – Other visitor types

5.5.1 Other visitor types included language students and those visiting the venue whilst on work-related business in Brighton & Hove for the day. As the overall sample for this group is exceptionally low, we have aggregated the expenditure results for each venue under tourism day visitor volume and spend.

5.6 GROSS visitor expenditure

5.6.1 Taking the average spend per person at each of the venues and applying it to the total number of visitors[8] is a matter of a simple multiplication. We have used the visitor results on trip type to distribute total admission numbers for the survey period by type of visitor. By doing this, it is calculated that the total direct gross visitor expenditure generated by visits to the Cultural Quarter venues is approximately £108.4 million.

5.6.2 The largest proportion of expenditure (84%) came from overnight visitors by virtue of the fact that their trip involves additional expenditure on accommodation and because their expenditure includes all items purchased each night of the trip and not just on the day of the visit.

5.6.3 The venue with the largest proportion of gross visitor expenditure was the Royal Pavilion. Gross expenditure associated with trips to the Pavilion is estimated to be around £48,947,000. The figure is pushed up by the high volume of overnight visitors attracted to the Pavilion.

5.6.4 The attendance figures for the Brighton Festival do not include events which are part of the Brighton Fringe. It should be noted that the last Economic Impact Study of the Brighton Festival of 2004 included attendance numbers of events which are now part of the Fringe. For comparability, if we add Fringe event attendance, total attendance increases to 435,000 and gross expenditure increases to £32.3 million. This includes local residents and is significantly greater than the £20 million estimated to have been spent by Festival visitors in 2004.

5.6.5 For the purpose of this study we have only included attendance at event organised by the Brighton Dome & Festival Ltd

Table 20: Gross visitor expenditure – All venues

Type of visitor	Total spend by visitor type	% distribution
Overnight visitor	£91,085,122	84%
Tourism day visitor	£10,325,473	10%
Local resident	£6,954,811	6%
Total	**£108,365,406**	

Table 20a: : Gross visitor expenditure - Brighton Dome

Type of visitor	% split	% split applied to total admission number	Avg. spend per head per trip	Avg. spend applied to admission number
Overnight visitor	9%	19,627	£304.60	£5,978,418
Tourism day visitor	44%	95,955	£37.02	£3,552,245
Local resident	47%	102,497	£27.79	£2,848,395
Total		**218,079**		**£12,379,058**

8 *Attendance data was supplied direct by the venues.*

Table 20b: : Gross visitor expenditure - Brighton Festival				
Type of visitor	% split	% split applied to total admission number	Avg. spend per head per trip	Avg. spend applied to admission number
Overnight visitor	14%	21,088	£362.66	£7,647,593
Tourism day visitor	28%	42,175	£29.96	£1,263,563
Local resident	58%	87,363	£26.03	£2,274,046
Total[9]		**150,625**		**£11,185,202**

Table 20c: : Gross visitor expenditure - Brighton Museum				
Type of visitor	% split	% split applied to total admission number	Avg. spend per head per trip	Avg. spend applied to admission number
Overnight visitor	44%	104,882	£290.80	£30,499,662
Tourism day visitor	32%	76,278	£23.62	£1,801,681
Local resident	24%	57,208	£11.89	£680,207
Total		**238,368**		**£32,981,550**

Table 20d: : Gross visitor expenditure - Royal Pavilion				
Type of visitor	% split	% split applied to total admission number	Avg. spend per head per trip	Avg. spend applied to admission number
Overnight visitor	60%	199,521	£228.16	£45,522,711
Tourism day visitor	31%	103,086	£27.65	£2,850,324
Local resident	9%	29,928	£19.19	£574,321
Total		**332,535**		**£48,947,356**

Table 20e: : Gross visitor expenditure – Theatre Royal				
Type of visitor	% split	% split applied to total admission number	Avg. spend per head per trip	Avg. spend applied to admission number
Overnight visitor	10%	4,886	£294.07	£1,436,738
Tourism day visitor	47%	22,963	£37.35	£857,660
Local resident	42%	20,520	£28.16	£577,842
Total		**48,857**		**£2,872,240**

[9] *The total attendance number is based on 58,425 ticketed attendance plus 95,200 free outdoor event attendance.*

5.7 Net additional visitor expenditure

5.7.1 In keeping with standard tourism economic impact approaches, we have removed local resident expenditure to calculate the overall net impact. We have also removed those visitors who were in Brighton for some other reason and visited the venue during their trip – that is to say their visit to Brighton & Hove was not a direct result of the venue. Thus, for these visitors, their trip expenditure in Brighton & Hove would have taken place regardless of the venue.

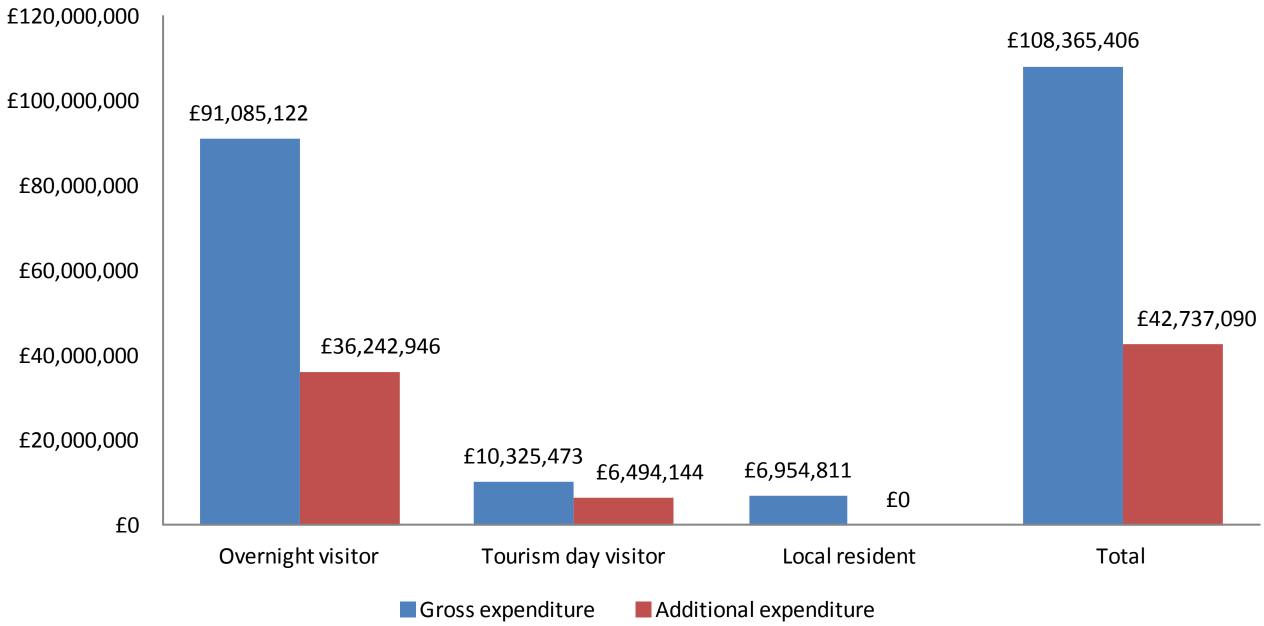
5.7.2 Once we allow for this adjustment, the total direct net visitor expenditure contributed by Brighton & Hove's Cultural Quarter venues is £43 million, representing an overall additionality of 36% out of gross expenditure.

5.7.3 Additionality is high for the Brighton Dome, at 64% followed closely by the Brighton Festival (61%) and the Theatre (61%), although the actual volume of trips and expenditure is considerably higher for the Festival. This high level of additionality suggests these venues play a central role in drawing new and repeat visits to Brighton & Hove who are drawn to the area because of their presence there.

Table 21: Additional visitor expenditure – All venues

Type of visitor	Additional spend by visitor type	% distribution
Overnight visitor	£36,242,946	84.7%
Tourism day visitor	£6,494,144	15.2%
Local resident[10]	£68,221	0.2%
Total	**£42,805,312**	
% of additionality	36%	

Figure 5: Gross and net additional visitor expenditure - all venues



[10] *A small proportion of local resident expenditure has been included as 'additional'. See 5.7.5 to 5.7.9 for explanation.*

5.7.4 The low level of additional for the Brighton Museum should not be interpreted as evidence of its lower importance in visitor's decisions to make a trip to Brighton & Hove. The results suggest that visits to the Museum tend to form part of an itinerary of things to do and see whilst in Brighton & Hove, forming part of an overall experience visitors seek rather than being the main driving force.

5.7.5 In the Brighton Festival net additional visitor expenditure figure we have allowed for a small proportion of local resident expenditure. In a standard economic impact appraisal all local resident expenditure is discounted as their expenditure is seen as simply displacing expenditure from somewhere else in the local economy.

5.7.6 However, there are some notable exceptions: if an event or venue can claim that it prevented the migration or leaking out of household income by keeping residents in their home town/city and encouraging them to spend money at home, arguably it has played a role on retaining household income which would otherwise be lost to that particular town/city.

5.7.7 However, few if any event or attraction can make such an incredulous claim. That said, in the case of high profile events which may only take place once over a year or once over several years, their uniqueness and absence of direct competition from other attractions in the area, may indeed encourage residents who may otherwise go away somewhere else over that particular weekend or week(s) to stay at home instead. This seems an entirely reasonable inference. Unfortunately there are few studies which can prove this.

5.7.8 The study we have used to guide our analysis on this is the Impact Study of the Edinburgh Festival of 2011. Surveys carried out with residents found that 97% would have done something else in Edinburgh if they had not visited the Festival (displacement) – only 3% of residents stated that they would have left Edinburgh during the period of the Festival and visited another place outside Edinburgh if it wasn't for the presence of the Festival (leakage of household income).

5.7.9 Regrettably our survey did not include any specific questions to measure the additionality of local resident trips. For this reason we are using evidence from the Edinburgh Festival to apportion 3% of local resident expenditure at additional.

Table 21a: Additional visitor expenditure – Brighton Dome

	Additional overnight visitor spend		Additional day visitor spend		Total additional spend
Main reason for entire trip	50%	£2,989,209	85%	£3,019,408	£6,008,617
Part reason for entire trip	5%	£298,921	2%	£71,045	£369,966
Weighting of part reason	0.35	£104,622	0.35	£24,866	£129,488
Total gross spend		£5,978,418		£3,552,245	£9,530,663
Total additional spend		£3,093,831		£3,044,274	£6,138,105
% of additionality		52%		86%	64%

Table 21b: Additional visitor expenditure – Brighton Festival					
	Additional overnight visitor spend		Additional day visitor spend		Total additional spend
Main reason for entire trip	47%	£3,594,369	54%	£682,324	£4,276,693
Part reason for entire trip	43%	£3,288,465	2%	£25,271	£3,313,736
Weighting of part reason	0.35	£1,150,963	0.35	£8,845	£1,159,808
Total gross spend		£7,647,593		£1,263,563	£8,911,156
Additional resident spend					£68,221
Total additional spend		£4,745,331		£691,169	£5,504,722
% of additionality		62%		55%	61%

Table 21c: Additional visitor expenditure – Brighton Museum					
	Additional overnight visitor spend		Additional day visitor spend		Total additional spend
Main reason for entire trip	8%	£2,439,973	16%	£288,269	£2,728,242
Part reason for entire trip	18%	£5,489,939	18%	£324,303	£5,814,242
Weighting of part reason	0.35	£1,921,479	0.35	£113,506	£2,034,985
Total gross spend		£30,499,662		£1,801,681	£32,301,343
Total additional spend		£4,361,452		£401,775	£4,763,227
% of additionality		14%		22%	15%

Table 21d: Additional visitor expenditure – Royal Pavilion					
	Additional overnight visitor spend		Additional day visitor spend		Total additional spend
Main reason for entire trip	43%	£19,574,766	49%	£1,396,659	£20,971,425
Part reason for entire trip	24%	£10,925,451	20%	£570,065	£11,495,515
Weighting of part reason	0.35	£3,823,908	0.35	£199,523	£4,023,430
Total gross spend		£45,522,711		£2,850,324	£48,373,035
Total additional spend		£23,398,674		£1,596,181	£24,994,855
% of additionality		51%		56%	52%

Table 21e: Additional visitor expenditure – Theatre Royal					
	Additional overnight visitor spend		Additional day visitor spend		Total additional spend
Main reason for entire trip	42%	£603,430	88%	£754,741	£1,358,171
Part reason for entire trip	8%	£114,939	2%	£17,153	£132,092
Weighting of part reason	0.35	£40,229	0.35	£6,004	£46,232
Total gross spend		£1,436,738		£857,660	£2,294,398
Total additional spend		£643,659		£760,745	£1,404,403
% of additionality		45%		89%	61%

5.8 TOTAL net economic impact of visitor expenditure

5.8.1 In addition to the direct net economic effects of the venues, the spending of visitors has a range of indirect and induced effects on the local economy.

5.8.2 The indirect or supplier linkage multiplier is estimated at 1:30 for the local economy. Thus every £1 of direct visitor expenditure associated with the venue will result in a further expenditure of 30 pence down the supply chain.

5.8.3 As a result of the direct and indirect effects the level of household income throughout the local economy will increase as a result of increased employment. A proportion of this increased income will be re-spent on goods and services in Brighton & Hove: this is the induced effect. The induced multiplier is estimated at 1:15 for the local economy. Thus every £1 of direct/indirect expenditure associated with the venues result in a further expenditure of 15 pence down the spending chain.

5.8.4 Using this approach an additional £12.8 million is generated through indirect impacts and £8.3 million through induced impacts. The total impact of visitor expenditure is estimated to be **£64 million**.

5.8.5 To establish the numbers of FTE jobs supported by visitor expenditure, turnover per job figures have been drawn from the tourism economic impact model widely known as the Cambridge Model. Based on this model, it is assumed that £55,000 is required to support each FTE job. Thus the direct, indirect and induced expenditure supports **1,164 FTE jobs in Brighton & Hove**.

Table 22: Total net effect – All venue		
Type Of Economic Benefit	Economic	Additional Economic Benefit
	Multiplier	(£)
Direct		£42,805,312
Indirect	0.30	£12,841,593
Induced	0.15	£8,347,036
TOTAL (direct/indirect/induced)		£63,993,941
FTE jobs supported		1,164

Table 22a Total net effect – Brighton Dome		
Type Of Economic Benefit	Economic	Additional Economic Benefit
	Multiplier	(£)
Direct		£6,138,105
Indirect	0.30	£1,841,432
Induced	0.15	£1,196,931
TOTAL (direct/indirect/induced)		£9,176,467
FTE jobs supported		167

Table 22b: Total net effect – Brighton Festival		
Type Of Economic Benefit	Economic	Additional Economic Benefit
	Multiplier	(£)
Direct		£5,504,722
Indirect	0.30	£1,651,416
Induced	0.15	£1,073,421
TOTAL (direct/indirect/induced)		£8,229,559
FTE jobs supported		150

Table 22c: Total net effect - Museum		
Type Of Economic Benefit	Economic	Additional Economic Benefit
	Multiplier	(£)
Direct		£4,763,227
Indirect	0.30	£1,428,968
Induced	0.15	£928,829
TOTAL (direct/indirect/induced)		£7,121,024
FTE jobs supported		129

Table 22d: Total net effect – Royal Pavilion		
Type Of Economic Benefit	Economic	Additional Economic Benefit
	Multiplier	(£)
Direct		£24,994,855
Indirect	0.30	£7,498,456
Induced	0.15	£4,873,997
TOTAL (direct/indirect/induced)		£37,367,308
FTE jobs supported		679

Table 22e: Total net effect – Theatre Royal		
Type Of Economic Benefit	Economic	Additional Economic Benefit
	Multiplier	(£)
Direct		£1,404,403
Indirect	0.30	£421,321
Induced	0.15	£273,859
TOTAL (direct/indirect/induced)		£2,099,583
FTE jobs supported		38

5.9 Venue expenditure in Brighton & Hove

5.9.1 In addition to the spending of visitors, the expenditures made by the venues themselves have an economic impact on the local economy. This includes items such as supplies and services from local businesses, building and grounds maintenance, accommodation and hospitality (mainly related to acting, creative and technical staff involved in productions), cleaning, and the wages of security, permanent, part-time and seasonal/casual staff.

5.9.2 Based on data supplied by the venues, approximately £7 million is spent by the venues in Brighton & Hove. However, as the Edinburgh Economic Impact Study recently highlighted, calculating the economic impact of expenditure made by the venues themselves is not straight-forward.

5.9.3 This is because there are inherent risks in double-counting expenditures. For example, some of the income spent on local goods and services by the venues from their total revenue, say on outside catering services, will have been from revenue generated by visitors themselves as a result of them purchasing tickets and buying on-site merchandise. As we have already captured data on how much visitors spent on tickets etc, we have already factored in ticket and on-site retail revenue in the visitor expenditure calculations; to include this revenue expenditure again would lead to double counting.

5.9.4 Finally income gained from local grants (which is then spent in the area) also needs to be discounted as arguably this income from Brighton & City Council is displacing funds which could be used to support other projects/enterprises in the City. If the venues did not exist, the funding would most likely be spent on some other activity in Brighton & Hove and is thus ‘deadweight’ in the same way local resident expenditure is.

5.9.5 Once these deductions are made, we find that all the expenditure incurred by the venues on local salaries and local businesses is derived from income generated by their visitors through ticket sales, on-site merchandise and catering (as in the case of the Theatre Royal) or through a combination of visitor derived revenue and through grants received from Brighton & Hove City Council (this includes Brighton Dome and Festival, and the Brighton Museum and Royal Pavilion). Thus there is no net additional income to include which has not already been accounted for in the visitor impacts.

6 Appendix 1: Copy of questionnaire

9 How did you first hear about this venue?
Circle all responses

Visit Brighton website	-1
Venue website	-2
Other website	-3
Word of mouth	-4
Posters	-5
TV/Radio	-6
Email announcements	-7
Newspaper/magazine	-8
Signage	-9
Banner	-10
Venue flyer/leaflet	-11
Other flyer/leaflet	-12
Other *(please specify)*	-13

....

10 Are you likely to visit any other venues or attractions within Brighton as part of your visit to the City?
Show Card 4 –circle all responses

Booth Museum of Natural History	-1
Brighton Dome (Concert Hall, Corn Exchange, Pavilion Theatre)	-2
Brighton Fishing Museum	-3
Brighton Marina	-4
Brighton Museum and Art Gallery	-5
Brighton Pier	-6
Brighton Sea Life Centre	-7
Brighton Toy and Model Museum	-8
City Sightseeing, Brighton Tour	-9
Concorde 2	-10
Hove Museum and Art Gallery	-11
Komedia	-12
Preston Manor	-13
Royal Pavilion	-14
Stanmer Rural Museum	-15
The Barlow Collection	-16
Theatre Royal Brighton	-17
Volks Electric Railway	-18
West Blatchington Windmill	-19
Other *(please specify)*	-20

11 How would you rate the overall enjoyment of your trip to this venue?

Very high	-5	Low	-2
High	-4	Very low	-1
Average	-3	Don't know	-0

12 What did you like most about this venue?

....

....

13 What, if anything, disappointed you or needs improvement?

....

....

14 During today and this evening, approximately how much are YOU AND YOUR IMMEDIATE PARTY likely to spend in total in Brighton & Hove on the following:

Eating & drinking **£**...............
in cafes, pubs, restaurants, hotels etc.

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

Shopping **£**................
including souvenirs, guidebooks, clothes, sweets, drinks, snacks, other purchases

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

Entertainment **£**...............
including admissions to attractions, cinema tickets,
guided tours etc.

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

Travel & transport - IN BRIGHTON & HOVE
£................
including fuel, fares, car parking charges

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

15 How many people do these amounts cover?

☐ People

16a Including yourself, how many people in your immediate party are male and female, and which of these age groups do they fall into?
Show Card 5 – write numbers in relevant boxes

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

16b Who are you with on this visit?

Alone	-1
With family	-2
With friends	-3
With family & friends	-4
Club/organised group	-5
Other *(please specify)*	-6

....

17 Finally, could I ask for your name and EMAIL address (for back-checking purposes only)?

This information will not be used for any other purpose and will not be held on any database or passed on or sold to any third parties.

Name ....

Email ....

If no email then take phone number

....

We want to establish the extent and importance of visitor spending in Brighton. Would you be interested in taking part in a follow-up survey where we would like to gather some more information on how much you spent over the duration of your trip to Brighton, for example on eating out?

If you are willing to take part in this survey we would like to do this online.

Yes agree -1 No thanks -2

Please be reassured that your email address will only be used for the purpose of contacting you for this survey and will not be kept on file or passed onto any third party.

<u>THANK YOU FOR YOUR TIME</u>