TOURISM
SOUTH EAST

South Downs Visitor & Tourism Economic Impact Study

Technical Report on the Research Findings

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GLOSSARY OF TERMS

Activity-Based Businesses	A business which provides goods for sale which are used for the pursuit of leisure/recreational activities
Activity Holiday & Excursion Operators	A business which arranges holidays and days out involving outdoor pursuits (i.e. Walking, cycling, fishing)
Commercial Accommodation provider	An accommodation provider which charges for the letting of rooms/units/pitches
Country House Hotel	A Country House Hotel with ample grounds or gardens, in a rural or semi-rural situation with an emphasis on peace and quiet.
Day Visitor	A visitor who travels into the Park area from home or holiday accommodation outside the South Downs
Guest Accommodation	This is made up of: **B&B** - Accommodation provided in a private house, run by the owner and with no more than six paying guests. **Guest House** - Accommodation provided for more than six paying guests and run on a more commercial basis than a B&B. Usually more services, for example dinner, provided by staff as well as the owner. **Farmhouse** - B&B or Guesthouse accommodation provided on a working farm or smallholding. **Inn** - Accommodation provided in a fully licensed establishment. The bar will be open to non-residents and provide food in the evenings.
Holiday Maker	A visitor staying away from home for leisure purposes
Hotel	Formal accommodation with full service. Minimum five guest bedrooms but more likely in excess of 20.
Leisure Visit	A leisure visit is defined as the use of a particular site for leisure purposes by a visitor or resident
Other Businesses	Business used mainly by local residents but which will receive a proportion of their turnover from visitors.
Staying Visitor	A visitor staying in accommodation in the South Downs National Park for tourism purposes, including leisure, business and/or social purposes
Visitor Attractions	The attraction must be a permanent established excursion destination, a primary purpose of which is to allow access for entertainment, interest, or education; rather than being primarily a retail outlet or a venue for sporting, theatrical, or film performances. It must be open to the public, without prior booking, for published periods each year, and should be capable of attracting day visitors or tourists as well as local residents.
Visitor Day	A day spent by the day or staying visitor during which they visit a site or sites within the South Downs

1 INTRODUCTION

1.1 Status of this report

1.1.1 This document provides a critical part of the evidence base for the South Downs National Park Management Plan and the Local Development Framework. The evidence base will also feed into the revision of The State of the National Park Report and the development of performance indicators. For brevity, in this report we refer to the South Downs National Park as the South Downs.

1.2 Study background

1.2.1 The South Downs National Park Authority commissioned an extensive programme of tourism research underpinned by the sustainable tourism development model – VERB (Visitor, Environment, Residents and Business). TSE Research, the research arm of Tourism South East, carried out the Visitor, Resident and Business elements. The Environmental aspect was covered in another research study carried out by Acorn Consultancy and has been reported separately. Relevant findings from the Environment Study are also discussed in this report.

1.2.2 The evidence gathering required updating an earlier study carried out in 2003/4 which involved a thorough analysis of the supply and demand of tourism within what was then the proposed South Downs National Park boundary. As with the 2003/4 study information is provided on key performance indicators including the volume and value of tourism visits, visitor profiles, visitor expenditure, and the range and type of tourism businesses operating in the South Downs.

1.2.3 The research carried out by TSE Research involved two main components:

- **Business Study**: a business audit was carried out to provide a current baseline of visitor-related businesses located in the South Downs against which future growth can be measured. A number of surveys were also carried out among businesses to identify business performance, future development plans, and the steps needed to encourage sustainable growth. This component covered the Business aspect of the VERB model.

- **Visitor** / **Resident Surveys**: the second element involved a survey among a sample of visitors and residents to gain insights into the profile of those who use the South Downs, how they use it, their experience of visiting, and to gain a better understanding of the impacts that visits to the South Downs have on local communities. This component of the research covered the Visitor and Resident aspect of the VERB model. Data gathering also included a survey among schools and organised groups to gain further insights into how the South Downs is used by different types of groups.

1.2.4 One of the primary aims of the research was to gather data which can be used to assess and calculate the economic impact of tourism activity in the South Downs. This has involved updating and enhancing the 2003/4 econometric model (used for the previous study) to quantify the annual number of visits to the South Downs and the impact of expenditure made during those visits on local business turnover and jobs.

1.2.5 As most of the research/survey instruments used in this study are similar to the 2003/4 study, we are able to provide a comparative assessment of 'then' and 'now' with regard to the supply of businesses, visitor profiles, South Downs usage patterns, and other key trip features[1]. New to the 2011/12 study is a more qualitative examination of local peoples and local businesses perceptions of tourism impacts on the South Downs.

1.3 Research methods

1.3.1 The **Business Study** involved three research methods. To provide a quantified picture of businesses which directly and indirectly benefit from visitor expenditure, an audit of tourism and other related businesses located in the South Downs was undertaken. The audit was supplemented with a business performance survey to help with our assessment of the level of leisure demand in the South Downs. The performance survey took the form of gathering monthly room/unit occupancy from a sample of commercial accommodation providers and monthly visitor admission figures from visitor attractions located in the South Downs. The third method involved an online consultation with a sample of businesses to identify issues around business growth, future development plans, and attitudes to sustainable management.

1.3.2 The **Visitor and Resident Survey** both involved face-to-face on site interviews using random sampling. The visitor survey was carried out on-site across the South Downs in locations used for recreational and leisure/holiday purposes. The resident survey was mainly carried out in the main towns and villages located in the South Downs. Both surveys gathered data on the demographic profile of visitors[2], key features of the visit, e.g. frequency of visits, activities undertaken and average expenditure, visitor satisfactions and visitor views on tourism impacts.

1.3.3 As with the 2003/4 study, two further surveys were added to provide supplementary data to help provide insights into the way particular groups use the South Downs. A survey was carried out among schools and colleges to establish the number and type of visits to the South Downs by educational establishments. A survey was also was undertaken among clubs, societies, and other social groups to assess the level of organised visits to the South Downs. However, the response rates to both these additional surveys were very low and thus the results yield only limited insights.

[1] *Boundary changes should be noted when making comparisons with the 2003/4 study findings.*

[2] *The Resident Survey also gathered data on the demographic profile of non-visitors and reasons for not visiting.*

1.3.4 **Volume and Value Modelling -** data from the aforementioned surveys was used to provide an indicative estimate of the total volume of leisure visits to the South Downs, and an estimate of business turnover and jobs sustained by visitor spending in the South Downs.

1.4 Outline of the report

1.4.1 Having briefly presented the background of the study, in the following three chapters we present our findings from the Business Survey. In **Chapter 2** the scale and nature of the visitor economy in the South Downs is discussed based on the available data. In **Chapter 3** we present a review of business performance and in **Chapter 4** we focus on business views on issues which are germane to this study, such as business needs, supports, and perceptions on sustainable business management practices.

1.4.2 **Chapter 5** presents results from the Resident Survey, providing insights into how the South Downs is used by local residents, and the reasons why a small minority of residents do not visit the South Downs for leisure visits.

1.4.3 In **Chapter 6** we present the results from the visitor survey shedding light on visitor profiles, trip features and how visitors experience the South Downs. This includes a limited set of findings from the survey among a sample of educational establishments and local social groups, clubs and societies.

1.4.4 Survey results on local people's views on the positive and negative impact of tourism flows into the South Downs, and how they think the South Downs can be enjoyed in a sustainable way is presented in **Chapter 7**. A comparative assessment of tourism impacts from the perspectives of visitors and land managers/managers of conservation and cultural heritage sites is also provided, drawing on the Visitor Survey and the Environment Survey.

1.4.5 **Chapter 8** presents the results of our bespoke modelling to estimate the annual volume of visits to the South Downs, and the impact of visitor spending on local business turnover and jobs.

1.4.6 In the concluding chapter, **Chapter 9** we present a set of recommendations about on-going visitor monitoring and identify areas for further research.

2 BUSINESS PROFILE

2.1 Introduction

The audit drew on data from a number of sources including searches through Yellow Pages, Thomson's Business Directory[3], the Office of National Statistics Business Demography publications, the Our Land website, as well as more general searches using the Internet. To ensure that only business located in the South Downs were included in the audit, a list of post-codes covering the South Downs boundary was used to cross-reference the location of each businesses using a specialist computer software package[4].

2.1.1 The audit is presented in an Excel database. It includes the name of the business, address, and contact details. For accommodation businesses we include additional information on the number of bedrooms and bed spaces, self-catering units, or camping and caravan pitches available. Each data set is categorised by type. There are 5 categories – **Commercial Accommodation** providers (hotel, B&B/guest house, including inn with rooms, self-catering, camping/caravan, hostels), **Visitor Attractions**, **Activity-Based Businesses**, **Walking & Activity Based Holiday Operators**, and **Other Businesses** which receive a proportion of their turnover from visitor expenditure. The latter include pubs, café/tea shop, petrol stations, bakers and clothes shops[5] (See Glossary for description of the categories).

2.1.2 Accommodation providers located in the South Downs were contacted to gather performance data on average room occupancy. A similar exercise was also carried out with visitor attractions to establish current levels of visitor admissions. Data was gathered via an online monthly form.

2.1.3 Comparative data from the 2003/4 study is available for the accommodation and visitor attraction sector[6]. However, it is important to note differences in the boundaries between the proposed park boundary as presented in 2003/4 and the final park boundary agreed in 2010 which includes Lewes. This should be borne in mind when making comparisons of the South Downs business demography between these two periods.

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[3] *This is a licence held database TSE Research has access to.*

[4] *Only businesses whose registered premises are physically located within the boundaries of the South Downs are included in the audit. B&Bs, self-catering cottages, attractions and so on close to the South Downs boundary are not included.*

[5] *The other business category does not represent a definitive list of all businesses a visitor may use during their visit to the South Downs. It is based on a list of the main industry sectors which are recognised in official government statistics (e.g. Office of National Statistic publications on tourism-related employment) as receiving an important proportion of their income from out-of-town visitors. These include the catering, retail and transport sectors.*

[6] *In the 2003/4 study Walking & Activity Based Holiday Operators were not included in the audit. A list of Other Businesses including pubs, tea-room, petrol filling stations, cycle shops and so on were included in the earlier audit but it included businesses located in towns which had close proximity to the proposed boundary. Given the wider geographical area covered and changes to the boundary we are unable to compare changes in these categories.*

2.2 Accommodation Sector

2.2.1 In total there are 386 accommodation businesses in the South Downs, of which nearly two-thirds (58%) are Guest Accommodation (B&B, Guest House including a few pubs with rooms). The majority are small businesses, which on average offer 3 bedrooms accommodating up to 6 guests (average bedspace of 6)[7].

Table 1: Total commercial accommodation stock in the South Downs

Visitor Accommodation	Number of businesses	Total bedspaces
Guest Accommodation	222	1,415
Hotel Accommodation	31	1,860
Caravan & Camping Sites	28	4,845
Self-catering Accommodation	100	552
Youth Hostels	5	216
All visitor accommodation	386	8,888

Fig. 1: Distribution of accommodation type

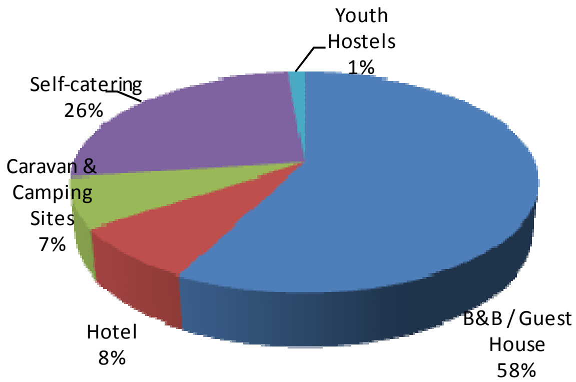
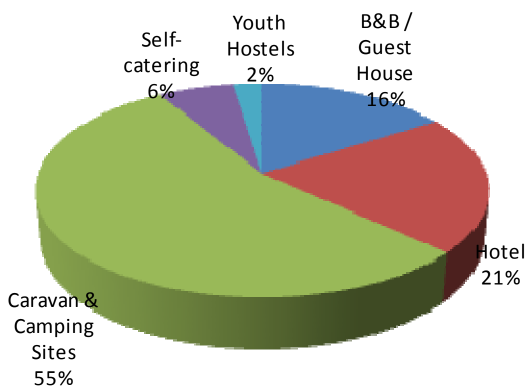


Fig. 2: Distribution of bedspace capacity



2.2.2 In terms of bedspace capacity (total number of people the accommodation sleeps), the largest accommodation sector is the caravanning and camping sector, which accounts for over half (55%) of total accommodation bedspace in the South Downs. The actual number of caravanning and camping sites in the South Downs is actually relatively small, accounting for only 28 businesses, but capacity is relatively high. The high capacity level is driven by three large campsites. These are the Ecclesden Farm campsite in Angmering which can accommodate up to 1,140 people, the Morn Hill Caravan Club campsite near Winchester which can accommodate up to 1,014 people and the Rookesbury Park Caravan Club Site in Wickham which can accommodate up to 684 people.

2.2.3 Most campsites are however, much smaller. Five of the 28 caravan and camping sites offer only five pitches which can accommodate up to 20 people.

2.2.4 There is some representation of hotel chains in the South Downs. These are the Holiday Inn in Winchester and two budget chain hotels – the Premier Inn in Arundel and another

[7] *Larger guest accommodation include the Burpham Country House guest accommodation which offers 10 rooms accommodating up to 19 guests, the Horse & Groom Guest House in East Ashling which offers 11 bedrooms, accommodating up to 22 guests, and Wetherdown Lodge in Petersefield which offers 15 rooms accommodating up to 35 guest.*

one in Petersfield. The remaining hotels are independents, of which the Amberley Castle Hotel near Arundel is a luxury boutique hotel.

2.2.5 A quarter (26%) of all visitor accommodation in the South Downs is self-catering cottages and houses. These are relatively small businesses, with most offering 2 bedroom accommodation, and thus only account for 6% of total accommodation bedspace in the South Downs (see Fig. 2 on previous page).

2.2.6 There are five youth hostels in the South Downs, three in East Sussex and two in West Sussex, run by the Youth Hostel Association (YHA). A new 68 bed youth hostel next to the Southease Railway Station in East Sussex is planned to open in the spring of 2013.

2.2.7 Overall, the largest concentration of commercial accommodation providers and of commercial bedspace is in the West Sussex part of the South Downs (accounting for 43% of accommodation businesses and 43% of total bedspace).

Fig. 3: Distribution of commercial accommodation

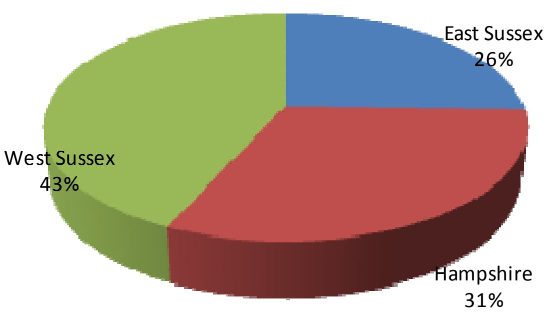
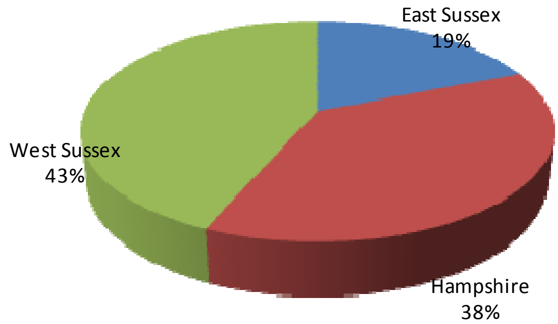


Fig. 4: Distribution of commercial bedspace



2.2.8 The number of accommodation businesses and bedstock is lower in the East Sussex part of the South Downs compared to the other two main counties (representing 26% of businesses and 19% of bedstock). The vast majority of accommodation stock in East Sussex is located outside the South Downs. A regional audit of commercial visitor accommodation carried out by TSE Research in 2009 and updated in 2011[8] established that there is just over 24,000 bedspaces in East Sussex. Notwithstanding potential changes to capacity since then, based on these figures, the volume of bedspaces available in the East Sussex part of the South Downs represents 7% of the county's total bedspace stock.

2.2.9 On the other hand, the volume of bedspaces available in the West Sussex part of the South Downs represents 18% of West Sussex's total bedspace stock (around 22,000 bedspaces available in West Sussex). The volume of bedspaces available in the Hampshire part of the South Downs represents 10% of Hampshire's total bedspace stock (around 35,000 bedspaces available in Hampshire).

[8] *Report: Meeting the data deficit: Baseline evidence gathering study for the South East Regional Development Agency. Confidential findings, not for publication.*

2.2.10 The distribution of accommodation stock by type of provider across each of the three main counties in the South Downs is presented in Tables 2 and 3.

Table 2: Commercial accommodation stock distribution in South Downs by county

	B&B / Guest House		Hotel		Caravan/Camp Sites		Self-catering		Youth Hostels	
	No.	% share	No.	% share	No.	% share	No.	% share	No.	% share
East Sussex	44	20%	7	23%	7	25%	37	37%	3	60%
Hampshire	85	38%	9	29%	9	32%	18	18%	0	0%
West Sussex	93	42%	15	48%	12	43%	45	45%	2	40%
Total	222	100%	31	100%	28	100%	100	100%	5	100%

Table 3: Commercial accommodation bedspace distribution in South Downs by county

County	B&B / Guest House		Hotel		Caravan/Camp Sites		Self-catering		Youth Hostels	
	No.	% share	No.	% share	No.	% share	No.	% share	No.	% share
East Sussex	331	23%	405	22%	630	13%	200	36%	122	56%
Hampshire	492	35%	643	35%	2,091	43%	109	20%	0	0%
West Sussex	592	42%	812	44%	2,124	44%	243	44%	94	44%
Total	1,415	100%	1,860	100%	4,845	100%	552	100%	216	100%

2.2.11 The previous audit carried out in 2003/4 identified 290 commercial accommodation businesses, suggesting an increase of 96 businesses since then. A review of changes since 2003/4 reveals an increase in all accommodation types with the exception of youth hostels which have remained at 5 establishments, though as mentioned earlier, a new youth hostel is planned to open in East Sussex in 2013.

Serviced[1] ↑ *Up from 196 businesses to 253 businesses*

Self-catering ↑ *Up from 78 businesses to 100 businesses*

Camping/caravanning ↑ *Up from 11 businesses to 28 businesses*

Youth hostels → *Same at 5 businesses*

[1] *Note serviced refers to guest accommodation and hotels*

2.2.12 Whilst it is important to factor in business closures during the period between the two studies and the changes to the boundary, our review suggests that growth has mainly been in the Hampshire part of the South Down, particularly in East Hampshire where the towns of Petersfield, Liss and Alton have seen the opening of a number of new accommodation businesses since 2003/4.

East Sussex — *Up from 91 businesses to 98 businesses*

Hampshire — *Up from 38 businesses to 121 businesses*

West Sussex — *Up from 161 businesses to 167 businesses*

2.2.13 In Winchester, the most recent addition to stock which falls within the boundary of the South Downs is the Holiday Inn which opened in 2010 adding 141 additional bedspaces.

2.3 Visitor Attraction Sector

2.3.1 There are over a 100 visitor attractions and places of interest in the South Downs. Given its special landscape it is not surprising to find that the most common visitor attractions and places of interest are nature reserves (24%), historic properties / sites (24%) and forest / woodland areas (14%). There are, however, a range of different types of attractions to draw visitors to the South Downs including art galleries, museums, vineries, gardens, and two large zoological parks; Drusillas Zoo in East Sussex and Marwell Zoological Park in Hampshire

2.3.2 The 2003/4 study identified a total of only 60 attractions within the proposed boundary as it was then. However, the earlier study adopted a more restrictive definition of what constitutes a visitor attraction and did not include nature reserves such as Birling Gap in East Sussex and forest / woodland areas of special interest such as the Forest of Bere in Hampshire. This makes it difficult to assess changes to the scale and nature of visitor attractions in the South Downs between the two study period.

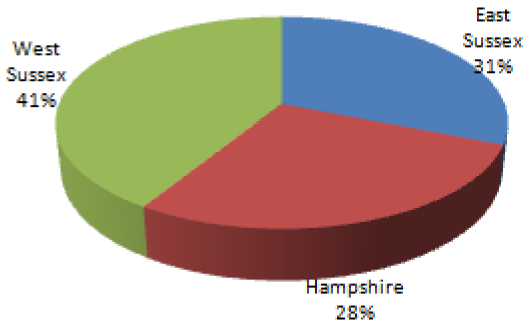
2.3.3 Moreover, as with the case of visitor accommodation, any assessment as to whether there has been any increase in the number of visitor attractions since 2003/4 is complicated by the fact that the new Park boundary is larger than the proposed boundary in 2003/4.

Table 4: Total no. of visitor attractions based in South Downs

Visitor Attractions	Number	Proportion
Nature reserves	29	24%
Historic properties/sites[1]	28	24%
Forest and Woodland	17	14%
Farm attractions	6	5%
Gardens	6	5%
Art galleries	5	4%
Country parks	5	4%
Museums	5	4%
Educational	4	3%
Potteries	4	3%
Vineyards	4	3%
Leisure centres	2	2%
Steam railway attractions	2	2%
Zoological parks	2	2%
Total	119	100%

Note:[1] includes historic houses, castles, monuments and a chapel

Fig. 5: Distribution of visitor attractions



2.3.4 As with the earlier audit, two community leisure centres - The Grange in Midhurst and The Taro Centre in Petersfield are included. Both are used mainly by local residents and are thus not 'visitor attractions' in the strict sense of the term. They are included to show the range of recreational services available in the South Downs.

2.3.5 Around 61% of the visitor attractions and places of interest in the South Downs are free to visit.

2.3.6 Of the 119 attractions and places of interest identified, 49 (41%) are located in the West Sussex part of the South Downs. A third (37 attractions / places of interest) are located in the East Sussex part of the South Downs, and the remaining 33 (28%) are located in the in the Hampshire part of the South Downs (see Fig. 5).

2.4 Activity holiday and excursion operators

2.4.1 In addition to commercial accommodation and visitor attractions, the study identified 21 holiday and leisure day excursion operators which provide activity based day trips and overnight holiday trips in the South Downs.

2.4.2 These are mainly walking and cycling holidays and days out and include Celtic Tours based in Chepstow and Footpath Holidays based in Wiltshire. Of these 21 operators, 11 are also based in premises in the South Downs. This includes Footpaths of Sussex based in Steyning and Walk & Cycle Britain based in Petersfield.

2.4.3 There are a number of other leisure operators which provide special day excursions in the South Downs including hot air balloon rides and boat trips which will have a role in bringing visitors to the South Downs.

2.4.4 The audit identified 8 hot air ballooning companies which arrange flights from various locations across the South Downs. Of these, however, only one company, The British School of Ballooning is based in the South Downs.

2.4.5 Beaufort Charters, based in Newhaven and Arundel Boat Yard & Riverside Tea Garden in Arundel, offer short boat trips to visitors.

2.5 Activity based businesses

2.5.1 The audit also involved identifying businesses located in the South Downs which provide more regular recreational and sporting experiences (i.e. paragliding centres, riding schools and golf courses) which have an important role to play in drawing visitors to the area (see Table 5, Fig.6).

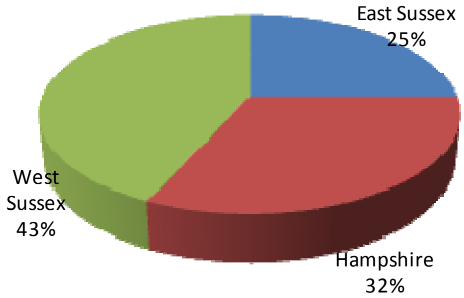
2.5.2 In total 44 activity-based businesses were identified. Of these, the most common, accounting for half of all businesses are equestrian centres offering riding courses. The second most common activity-based business are golf courses (45%).Two paragliding centres, one located in Lewes and one located in Alton also fall within the boundary of the South Downs.

2.5.3 The largest concentration (43%) of these activity-based businesses are located in the West Sussex part of the South Downs. A third a based in the Hampshire part of the South Downs and a quarter are based in the East Sussex part of the South Downs.

Table 5: Total no. of activity businesses based in South Downs

Activity based businesses	Number	Proportion
Equestrian centre/riding schools	22	50%
Golf courses & clubs	19	45%
Paragliding centres	2	5%
Total activity-based businesses	44	100%

Fig. 6: Distribution of activity-based businesses



2.6 Other businesses used by visitors

2.6.1 Visitor spending is not confined to the hospitality sectors of accommodation, attractions and other businesses offering recreational services. Whilst visiting a destination a wide range of goods and services will be purchased by visitors including bus and taxi fares, petrol from filling stations, food and beverages from cafes, tea-rooms, restaurants and pubs, cycle hire and retail items from corner shops to high-street fashion chains.

2.6.2 To get a measure of the range of businesses available in the South Downs which receive a proportion of their turnover from visitor expenditure, the audit included a wider range of 'Other Businesses'. In total 357 'Other Businesses' which provide goods and services used by visitors were identified[9].

2.6.3 However, it should be noted that this does not provide a comprehensive list of every businesses located in the South Downs which a visitor may use. For example, a visitor may purchase a stamp from a post office during their holiday, but post offices are not included in the audit. The choice of businesses to include under 'Other' has been based on the list of the main industry sectors which are recognised in official government statistics (e.g. Office of National Statistic publications on tourism-related employment) as receiving an important proportion of their income from out-of-town visitors. These include the catering, retail and transport sectors.

2.6.4 Most of these other businesses are food and beverage businesses (63%) and a quarter are retail shops. Smaller numbers include angling/fish tackle shops, cycle shops/cycle hire, taxi services and petrol stations. The distribution of 'Other Businesses' across the

[9] *This is lower than the number of Other Businesses identified by the 2003/4 audit. The earlier study identified 578 are retail businesses used by visitors, 280 businesses in which visitors purchase food and drink, and 60 transport related businesses such as petrol filling stations, bus operators and taxi companies. However, the geographical area of study was much wider than the new study as it included towns which were in close proximity to the proposed boundary of the time. Given this and the boundary changes since then, we are not able to directly assess any changes to the supply and nature of the Other Business category.*

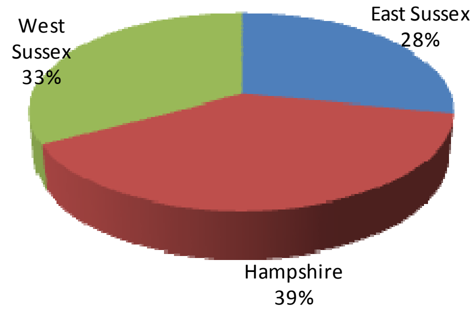
South Downs reveals that over a third are in the Hampshire part of the South Downs, a third are in the West Sussex part of the South Downs and 28% are in the East Sussex part of the South Downs.

Table 6: Total number of 'other businesses'

Other businesses	Number	Proportion
Food & beverage businesses [1]	224	63%
Retail shops [2]	87	24%
Transport businesses [3]	30	8%
Angling & fishing shops	9	3%
Cycle shops/hire	7	2%
Total	357	100%

Note: [1] includes bakeries, coffee shops, pubs, bars restaurants and takeaways
[2] includes corner shops, off-licences, clothes shops, gift shops, and farm shops
[3] includes taxi services and petrol stations

Fig. 7: Distribution of other businesseses



3 BUSINESS PERFORMANCE

3.1 Introduction

3.1.1 There are two broad performance indicators which help us gauge the health of the tourism industry. For accommodation providers, this is average room occupancy and for visitor attractions, this is admission numbers.

3.1.2 In addition to being key performance indicators, they are important data sources for calculating visitor volumes to a destination. In this study, occupancy data will play a role in helping us establish the number of commercial bednights spent in the South Downs[10].

3.1.3 Attraction admission figures are not often a direct driver in calculating visitor volumes to a destination, as the footfall data alone is unable to distinguish between visits made by local residents and those made by visitors from further afield. In this study, the attraction admission figures are first and foremost provided as an indicator of the size and performance of the attraction sector in the South Downs.

3.1.4 That said the nature of the "attraction sector" in the South Downs causes some problems as to how to measure performance. Given many of the places to visit in the South Downs are open access areas (i.e. nature reserves and forest/woodland areas); it is not possible to monitor visitor volumes on a regular and consistent basis. A few country parks (e.g. Seven Sisters Country Park and Queen Elizabeth Country Park), and forest/woodland areas (e.g. Alice Holts Forest) do keep a record of visitor footfall which are based on metered car park occupancy rates.

3.1.5 In addition to these three attractions, our admission figures are from attractions which keep records of visitor numbers which include art galleries, museums, historic houses, and sites, potteries, vineries, farm and steam railway attractions. Admission figures were not collected for the two community leisure centres, given that they are mainly used by local residents, many of whom are members of the centres and will use them very frequently.

3.1.6 Using a combination of direct contact with the attraction (online survey forms) to gather admission figures and supplementing that data with admission results from those attractions which participate in Visit England's quarterly England Attraction Monitor[11], we were able to gather admission figures for 59 attractions located in the South Downs.

3.1.7 We were less successful in gathering occupancy data from the South Downs's accommodation businesses. Of the 386 businesses identified, only 17 agreed to provide

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[10] *However, the main data source will be the results of the visitor survey. Overnight visitors were asked about the type of accommodation they stayed at, the length of the stay and their total expenditure on accommodation costs. The occupancy data will be used to help us calibrate the overall figures for overnight trips.*

[11] *Between 650 to 680 attractions take part in this survey quarterly. The survey is carried out by BDRC on behalf of Visit England and include a mix of attraction types.*

occupancy data. Of these 4 were self-catering cottages and 13 were serviced accommodation businesses (guest accommodation and hotels).

3.1.8 To supplement the data, we drew on the results from the England Occupancy Survey[12]. Occupancy results from a further 18 South Downs serviced accommodation providers were available from the national survey. In total, data was available from 31 serviced accommodation providers, representing 8% of total stock.

3.1.9 On their own, the unit occupancy results from the 4 self-catering establishments do not provide a reliable measure of performance so we have drawn from a number of other data sources to help assess likely occupancy rates[13]. Occupancy data was also obtained from the Camping and Caravanning club for the sites they manage in the South Downs.

3.2 Business performance

Serviced accommodation

3.2.1 Occupancy data was gathered to cover a 12 month period from July 2011 to June 2012. The results, albeit based on a very small sample established that occupancy rates for serviced accommodation (hotels and guest accommodation) vary significantly throughout the year from as low as 10% for some in January to a high of 94% for some in August.

3.2.2 The average annual bed occupancy rate[14] for serviced accommodation in the South Downs based on the results of the 31 businesses providing data is 49%. Although the results are based on a small sample, the performance figure is similar to that achieved at regional level.

3.2.3 The average for the South Downs is higher than that reported in the last study eight years ago. The average bed occupancy reported in the 2003/4 study for serviced accommodation was 43%[15].

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12 *The England Occupancy Survey (EOS) commissioned by Visit England measures, on a monthly basis, levels of bedroom and bedspace occupancy across the serviced accommodation sector*

13 *This has involved calibrating the results against the Cumbria Self-Catering Survey which produces monthly unit occupancy data. Apart from the Cumbria research there is a serious dearth of information on the performance of the non-serviced sector including self-catering and camping / caravanning parks. No survey exists at national level which gathers this data and since the demise of Regional Development Agencies, funding has ceased at regional level to gather local occupancy data.*

14 *Average bed occupancy is calculated using the following formula:*
Average annual bed occupancy = (annual number of beds occupied / annual number of beds available) x 100

15 *The 2003/4 serviced accommodation occupancy results were based on 19 establishments.*

Table 7: Serviced accommodation average bed occupancy

Month/year	Regional average	South Downs average
Annual	**48%**	**49%**
June 2012	58%	60%
May 2012	53%	52%
April 2012	49%	52%
March 2012	38%	33%
February 2012	37%	35%
January 2012	33%	36%
December 2011	38%	33%
November 2011	41%	30%
October 2011	46%	41%
September 2011	55%	55%
August 2011	61%	70%
July 2011	63%	69%

Non-serviced accommodation

3.2.4 The results from the four self-catering accommodation businesses indicate that three out of the four have low levels of seasonality and relatively high unit occupancy rates. During the shoulder and off-peak tourism season, bed occupancy is around 50% to 55%, whilst during the busy peak summer months it rises to highs of 80% to 90%, providing an average occupancy among all four businesses for the previous 12 months of 65%. Based on the establishments providing data in 2003/4, average bed occupancy recorded for self-catering establishments was 63%.

3.2.5 Given the small sample it is not possible to draw conclusions about the self-catering sector from this small sample alone. Comparative data from other rural destinations outside the South East such as Cumbria indicate self-catering average bed occupancy of around 40%[16]. There is some anecdotal evidence to suggest that average bed occupancy of 40% is far too low for South Down businesses. Whilst there is no regional self-catering occupancy survey to provide a benchmark, our destination level tourism impact studies[17] which involve gathering occupancy data from both serviced and non-serviced commercial accommodation sectors across the South East indicate that annual average self-catering average bed occupancy rates range from 45% to 65%.

3.2.6 Touring and static caravan occupancy rates were gathered from the Camping and Caravanning Club who manage two sites in the South Downs. The year to date figures indicate that performance has been lower this year (an average of 50% pitch occupancy) compared to the relative boom seen in this sector since 2009 – the year of the 'staycation', when average rates of 60% to 80% were seen across different parts of the region.

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[16] *Data obtained from Research Department, Cumbria Tourism*

[17] *The Cambridge Model tourism impact studies we carry out for local authorities across the South East involve gathering occupancy data from commercial accommodation providers in the area. Thus we have some insight into the performance of the self-catering sector in rural areas based on the data gathering process for the Cambridge Model studies.*

3.2.7 Drawing on the data received for the camping and caravanning sector, we estimate that the average bed occupancy rate[18] for the 12 month study period was around 45%. Feedback from several camping and caravan sites revealed that weekends have been particularly busy with many being fully booked. Weekdays have generally been quieter, suggesting that camping and caravan holidays have tended to be shorter in 2012, perhaps as a result of the inclement weather conditions seen this year.

3.2.8 The general national picture of the non-serviced accommodation sectors of self-catering and camping/caravanning, is that both sectors have experienced strong occupancy since 2009 due primarily to the effects of the economic downturn leading to reduced spend on overseas holidays with British consumers choosing to economise by holidaying at home. Results from the United Kingdom Tourism Survey revealed that 29% more camping trips were taken in Britain during 2009 than in 2008 and it was the first time camping was more popular than B&Bs. The Camping and Caravanning Club also reported a 23% rise in bookings during 2009 when compared to 2008. This strong occupancy continued into 2010 and 2011. It is highly likely that the wet weather conditions over the summer this year curtailed the growth which was expected for 2012.

Visitor attractions

3.2.9 Visitor admission data was gathered to cover a 12 month period from July 2011 to June 2012. Data was available for 59 attractions.

3.2.10 Based on the results of the 59 attractions in the sample, the five largest attractions receive between 250,000 to 499,999 visitors a year. Four attractions are in the tier below, each receiving between 100,000 to 249,999 visitors a year.

3.2.11 The majority of attractions (52%) are, however, relatively small attractions receiving less than 4,999 visitors a year.

Table 8: Annual attraction admission numbers

Visitor numbers	Number of attractions	Proportion
250,000 – 499,999	5	9%
100,000 – 249,999	4	7%
50,000 – 99,999	7	12%
25,000 – 49,999	2	3%
10,000 – 24,999	5	9%
5,000 – 9,999	5	9%
Less than 4,999	31	52%
Total	59	100%

3.2.12 To provide further contextual data, we have drawn on results from the quarterly England Visitor Attractions Monitor[19] for the period Q3 2011 (July to September) and Q4 2011

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[18] *We have made a further calculation to convert pitch occupancy into bed occupancy by estimating the average group size occupying each pitch.*

[19] *England Attractions Monitor commissioned by Visit England is an online panel to help provide the attractions industry with rapid feedback on current trends in visits to attractions in England. Every quarter around 700 attraction submit performance data.*

(October to December) and Q1 2012 (January-March) and Q2 (April to June) to cover the same time-frame as this study.

3.2.13 The results indicate that overall 2011 was a positive year for outdoor attractions, especially gardens and wildlife attractions. This perhaps reflects the unusually warm, dry weather in the shoulder periods (September, October and November 2011) which had the effect of extending the season for many. Outdoor attractions bounced back from a generally challenging year in 2010 when the summer period was characterised by dull weather. Conversely, museums / art galleries experienced a challenging year with visits down -1% overall, following a positive year in 2010.

3.2.14 Trading conditions, however, change again by the second quarter of 2012 (April to June). Overall we see a buoyant first quarter, with Easter and May-June this year posing more challenging conditions, despite the holidays and Jubilee celebrations. Visitor numbers are reported to have fallen by an average of 2% in the April to June period. A colder, wetter Easter and June this year was reported to be the primary factor.

3.2.15 We see a more divided market picture this year with some attractions benefiting at the expense of others, most notably outdoor attractions losing visitors to indoor alternatives, at the hands of the weather. This pattern continues into the summer months of July and August this year which experienced one of the wettest periods in the last 100 years according to weather records. Moreover, the Olympics caused disruption in trading conditions for a number of London based attractions and attractions close to London. However, we have no evidence of any impact the 2012 Games had on visitor admissions for attractions based in the South Downs.

4 BUSINESS ATTITUDES & ASPIRATIONS

4.1 Introduction

4.1.1 As part of the evidence gathering process, accommodation businesses and visitor attractions were invited to take part in an online consultation to shed light on a number of business issues. These included establishing the extent to which sustainable business practice is used, how this can be expanded, and what hurdles prevent progress. It also covered business owners and managers motivations for ownership (financial, lifestyle), future business development plans (expansion, status quo or retraction), and knowledge of the national park status of the South Downs and its purpose.

4.1.2 In total 398 businesses[20] were invited to take part in the survey of which 94 responded, providing a response rate of 24% which is typical for online surveys. However, of the 94 businesses taking part in the online survey, 74 (77%) are visitor accommodation businesses, 16 are visitor attractions and 4 businesses left their details anonymous so it is not possible to identify which sector they represent. The skew towards accommodation businesses clearly reflects their dominance in the overall sample invited to take part in the survey – 331 accommodation businesses and only 51 visitor attractions. Thus, the overall response rate is consistent with the proportions in the overall sample. See Appendix 1 for a copy of the questionnaire.

4.2 Awareness of South Downs National Park designation

4.2.1 Awareness of the South Downs status as a national park is high among the businesses located there. All but 6 businesses were aware that their business is located within the South Downs National Park boundary. Of these, 72% believed designation was granted due to its special landscape needing protection.

Table 9: Reasons for of National Park designation

Base	88
It has special habitat/wildlife which needs protection	2%
It has special archaeological interest which needs protection	0%
It has special landscape which needs protection	72%
It has a unique cultural heritage which needs protection	2%
It needs special management to promote sustainable growth	1%
Not sure reasons for designation/don't know	12%
Other responses	10%
Total	100%

[20] *The Business Survey was carried out in March 2012 and the record of 389 businesses is based on the number of accommodation businesses, visitor attractions, and activity-based leisure operators (e.g. golf courses, riding schools) identified up to that point in time. This included 331 accommodation businesses, 51 visitor attractions and 16 other activity based businesses. Since then, the record of South Down businesses has growth, see Business Audit for final list.*

4.3 Motivations for running a business in the South Downs

4.3.1 The results from the online consultation indicate that for commercial accommodation and attraction businesses, the main motivations for running a business in the South Downs can be grouped into two broad camps.

4.3.2 There are those businesses which are essentially ‘life-style’ focused. They are run by people who seek to combine their desire to live in the South Downs to enjoy its special landscape and at the same time earn an income from doing something they enjoy. This includes both people who have moved to the South Downs from outside the area to start a business, as well as local residents who let out a room in their own home.

“*I moved here 12 years ago and was attracted by the beauty of the area/countryside and also nearness to the coast. The area has retained much of its historic architecture and has good road and rail links, restaurants, pubs. Therefore seemed a good bet to start a B&B and people from all over the world are captivated by the pretty villages, country pubs, walks etc”.*

“It is an area of outstanding natural beauty and we were lucky enough to live here and have a home that allowed us to do Bed and Breakfast”.

“Originally we moved here for personal reasons, and people kept asking us if they could stay, so we opened up as a B&B. We are in a beautiful area and there are plenty of walkers and cyclists that need accommodation”

“*We were looking for a bed and breakfast nationally and we found the price was right for us here and also it was a lifestyle choice for us. It had to be somewhere we wanted to live and this area filled those criteria”.*

4.3.3 The second camp appears to be more driven by pure financial imperatives.

“I have been in this area for 77 years. In the 1990s the Government said we had to diversify in order to exist. That's when we started our business”.

“I was living in this area when my marriage broke up and I was able to use my home to do bed and breakfast. I love the area myself and when I took on another property, I stayed in the same area”.

“ It was purely financial. We had the room to do B&B and we needed the money”.

4.4 Future development plans

4.4.1 Half of all businesses surveyed had no plans to grow or downsize their operations. However, 40% of businesses did have plans for growth whilst 1 in 10 were looking to scale down.

4.4.2 Our research suggests that the reasons for businesses remaining as they are or seeking to scale down vary from legal constraints (planning permission being denied/building being a listed building), personal issues (happy with current performance and see no need to change, or nearing retirement and seeking to scale back), to increased competition and the impact of the recession on reducing trade.

4.4.3 Those seeking to expand, on the other hand, are often already operating at full capacity and needed more staff or more space or both. A quarter reported that their future development plans are connected to the recent National Park designation, seeing this as an opportunity to attract more custom.

4.4.4 Just over half (56%) believe that the fact that the area is a National Park has benefited their business.

4.5 Sustainable business practices

4.5.1 The vast majority of businesses surveyed were positive about sustainability. Forty-four percent of businesses reported that sustainability is ‘Somewhat important’ whilst around a half of all businesses (49%) reported that sustainability is ‘Very important’ to their business.

4.5.2 Whilst nearly all businesses have taken a number of actions at the level of business operations, ranging from using local suppliers, recycling, growing their own produce (see Table below), only 14% are part of a green accreditation scheme, the most popular one being the Green Tourism Business Scheme.

Table 10: Actions taken to make business more sustainable

Base	88
Energy usage, e.g. heating/lighting/vehicle fuel/car sharing/carbon neutral & offsetting	79%
Waste, e.g. the reduction, reuse, and recycling of waste produced by the business	88%
Water - e.g. the reduction and recycling of water produced by the business	59%
Grow, e.g. make own produce/ use locally produced food and drink	71%
Information provision, e.g. provide visitors with information on public transport and local wildlife	76%
Sustainable build - e.g. solar panels or using local building materials	41%
Promotion of other local businesses, e.g. use local suppliers and recommend local businesses	93%

NB: multiple responses permitted

4.5.3 Some businesses reported to find it hard to be sustainable (around 44% of the total sample) with the main hurdle being the initial high set up costs (67% mentioned this hurdle), followed by the difficulty in directly measuring the benefits in a tangible way (33% mentioned this hurdle).

4.6 Support from the South Downs National Park Authority

4.6.1 Marketing/promotion of the South Downs and the provision of visitor information are the two top actions businesses believe the South Downs National Park Authority should take to develop the South Downs in a way which helps their business to grow.

Table 11: How the SDNPA can add value

Base	94
By providing visitor information	74%
Promoting more sustainable tourism	68%
By developing customer focused training to ensure visitors experience a high level of customer care	38%
By working in partnership to market and promote the South Downs as a place to visit and stay	80%
By facilitating partnership working between local businesses to develop the unique offer at particular sites	53%
By developing a strong Brand for the area	61%
Other	28%

NB: multiple responses permitted

4.6.2 A number of other areas requiring action are also identified, including influence on planning policies:

"*There could be better planning. There are a lot of restaurants, tea shops and cafes opening in this area, which is all added competition".*

"Relax planning controls on converted farm buildings, as very isolated properties are not easy to let for holidays during winter".

4.6.3 The provision of funding:

"Provide funding for local businesses".

"By subsidising facilities for visitors to use like shops, toilets, car parking and litter bins. Things like taps for dog water".

4.6.4 As well as further engagement with businesses:

"By being pro-active in seeking the ideas and needs of local businesses. By making personal contact with local business owners. By providing information about proposed publicity, managing visitors, vision for the SDNP".

"By being proactive and increasing their visibility. They are difficult to contact and so far have kept a low profile".

4.6.5 Businesses see the South Downs National Park Authority as having an important role in providing support and information / advice on sustainability and taking a lead role in developing the South Downs as a sustainable tourism destination.

Table 12: Role SDNPA can play in encouraging sustainable business practices

Base	88
By providing support and information / advice on sustainability	71%
By subsiding green accreditation schemes such as Green Tourism Business Scheme	58%
By taking a lead role in developing the South Downs as a sustainable tourism destination	75%
By taking a lead role in developing a local sustainable tourism network	64%
Other	21%

NB: multiple responses permitted

4.6.6 A few businesses wanted help with grants to support implementing sustainable business practices.

"Provide subsidies or access to grants for energy efficiency etc".

"Provide funding to help with set up costs".

"Provide funding to encourage sustainability".

"Make it easier for businesses to access information on grants for sustainable practices. We just don't have the time to wade through the bureaucracy of this".

5 RESIDENT SURVEY RESULTS

5.1 Introduction

5.1.1 The 2003/4 study established that parts of the South Downs are used extensively by local residents for outdoor recreational activities, such as walking, running, cycling, walking the dog etc. The earlier study also established that a small but significant minority of local residents did not visit the South Downs for leisure-related purposes. To enable an assessment of the scale and nature of informal visits by local people, a face-to-face survey of local residents was undertaken.

5.1.2 The survey provided information on the frequency, location, expenditure and other characteristics of informal visits by local residents, and in conjunction with the site visitor survey data, enabled estimates to be made concerning the value and volume of this group of visitors. Data was also gathered from non-visitors to identify reasons for not visiting.

5.1.3 The interviews involved a degree of qualitative enquiry which focused on the views and experiences of local communities with regard to how they perceive the impact of visits to the South Downs in terms of positive and negative elements of those visits. These perceptions of visitor impacts are reported separately in Chapter 6. See Appendix 2 for copy of *Resident Survey Questionnaire*.

5.1.4 Local residents were interviewed close to home mainly in town and village centres across the South Downs.

5.1.5 In total 244 interview sessions were carried out between the hours of 10 am to 6pm, over a selection of weekdays and weekends. Over the 12 month interview period (from October 2011 to September 2012) 2,356 local residents were personally interviewed across 20 different locations. Some locations were very quiet with footfall adversely affected by the inclement weather seen over the survey period (i.e. near Stanmer Park, East Dean village and Ebernoe Common). Town centre footfall was generally higher in the larger towns with higher resident populations and plenty of local amenities leading to higher samples (i.e. Lewes, Midhurst and Petersfield).

5.1.6 The number of interview sessions arranged per site was strongly influenced by the weather (e.g. the need to provide shelter during wetter periods) and anticipated throughput of residents to maximise contact rates.

5.1.7 Overall there was even representation of interview locations across East Sussex, Hampshire and West Sussex parts of the South Downs. However, the Hampshire locations were simply a lot busier and consequently far more residents were interviewed.

Table 13: Resident survey sample distribution

Interview location	No of interviews days	Sample achieved	Proportion
Alfriston village centre	12	102	4%
Amberley village centre	10	108	5%
Arundel town centre	20	103	4%
Chanctonbury	4	25	1%
Ditchling village centre	10	79	3%
East Dean village centre	8	25	1%
Ebernoe Common	3	22	1%
Lewes town centre	25	239	10%
Liss town centre	8	64	3%
Midhurst town centre	25	297	13%
Petersfield town centre	25	367	16%
Petworth village centre	18	109	5%
Pulborough Brooks Reserve	14	55	2%
Selborne village centre	8	116	5%
St Catherine's Hill	22	350	15%
Near Stanmer	2	16	1%
Near Stansted House	7	80	3%
The Trundle	6	35	1%
Twyford Locks & Meadows	11	87	4%
West Meon village centre	6	77	3%
Total achieved sample	**244**	**2,356**	**100%**

5.2 Awareness of South Downs National Park designation by residents

5.2.1 Awareness of the South Downs National Park is relatively high; 86% of local residents reported that they are aware. Around half of those who reported to be unaware of the South Downs (representing 18% of the total sample), did in fact visit the South Downs when shown a map of locations (see section 5.3).

5.2.2 Of those aware of the national park status, the two top reasons they believe lay behind the designation are 'It has special landscape which needs protection' (46%) and 'It has special habitat/wildlife which needs protection' (42%).

5.2.3 Just over a fifth (22%) reported that they are not sure why the South Downs had been designated as a national park.

Table 14: Reasons for National Park designation

Reasons for designation	Base = 2,026
It has special landscape which needs protection	46%
It has special habitat/wildlife which needs protection	42%
It has a unique cultural heritage which needs protection	24%
Not sure of reasons for designation/Don't know	22%
It needs special management to promote sustainable growth	21%
It has special archaeological interest which needs protection	19%

Note: Multiple responses permitted

5.3 Frequency of visits to the South Downs by residents

5.3.1 Overall, 93% of local residents interviewed visit the South Downs for leisure/recreational purposes. This includes a small minority of local people who initially reported they were unaware of the South Downs National Park, but when shown a map of the area covered, did indeed visit one or more locations, sometimes on a regular basis and had not simply associated the area as part of a national park.

5.3.2 Around a quarter of local residents visit the South Downs every day to several times a week (9% every day and 16% several times a week). Another quarter of residents visit at least once a week. Just over a fifth (22%) of local residents visits the South Downs for a leisure visit at least once a month.

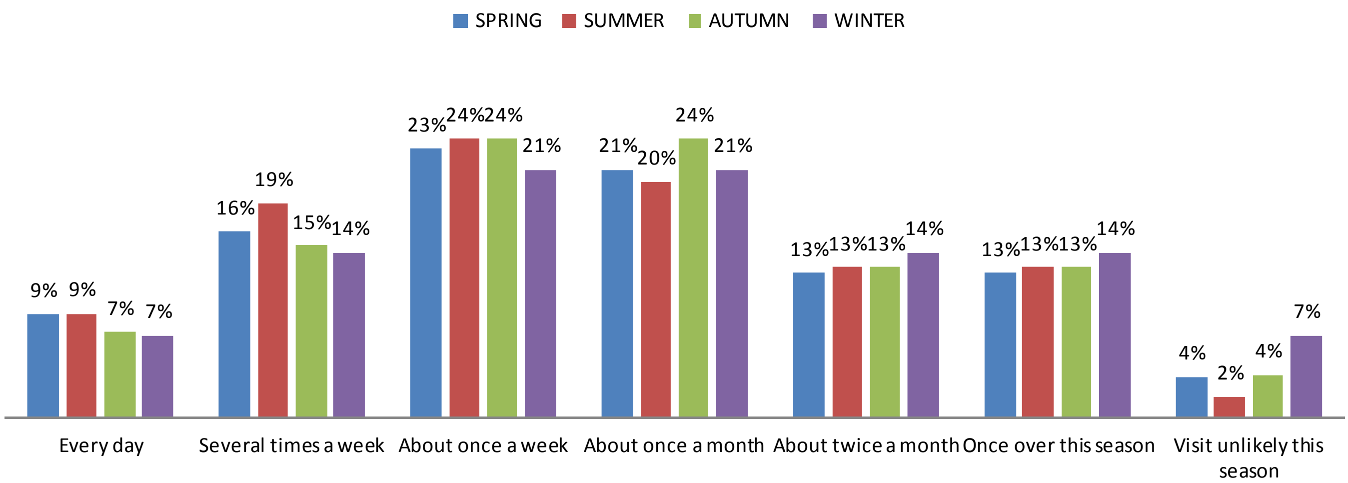
5.3.3 For around 13% of the resident population who reported that they visit the South Downs for leisure purposes, the frequency of visits was estimated to be about twice a month, or 24 times a year. A further 13% of local residents reported that they visited the South Downs for a leisure visit at least once each season, or at least 4 times a year.

Table 15: Frequency of visits by residents across the seasons

Frequency of visits	Base = 2,208
Every day	9%
Several times a week	16%
About once a week	24%
About once a month	22%
About twice a month	13%
Once over each season (4 times a year)	13%
Can't recall frequency – varies	4%

5.3.4 Interestingly, the pattern in the frequency of visits by local residents does not change in any significant manner over the different seasons of the year, reflecting the South Downs popularity for all year round activities such as walking and dog walking.

Fig 8: Frequency of visit among residents by season



5.4 Profile of residents visiting the South Downs

5.4.1 A typical resident who visits the South Downs for informal leisure visits will be white British, over 45 years, will not have a health related issue and will be from an ABC1 household. This profile appears almost unchanged compared to the findings of the 2003/4 study.

5.4.2 The survey found that only 1% of residents who visit the South Downs for leisure/recreational purposes are from non-white ethnic groups, the same proportion as in 2003/4. This finding, however, needs to be set against the generally very low proportion of residents living in towns and villages in the South Downs who are from the ethnic minorities. Only 11 residents with a Black or Ethnic Minority origin were interviewed.

5.4.3 The majority of residents who visit the South Downs (68%) are from ABCI socio-economic households. A third (32%) are from C2DE socio-economic households.

Fig. 9: Socio-economic background of residents visiting South Down

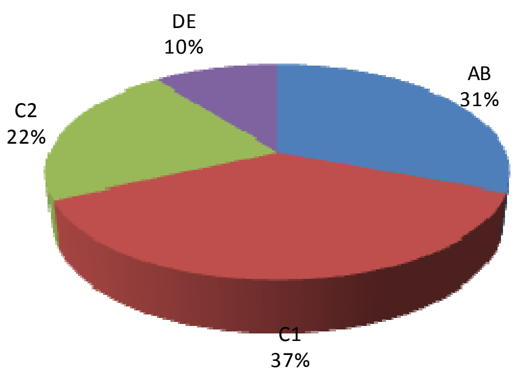


Fig. 10: Ethnic background of residents visiting the South Downs

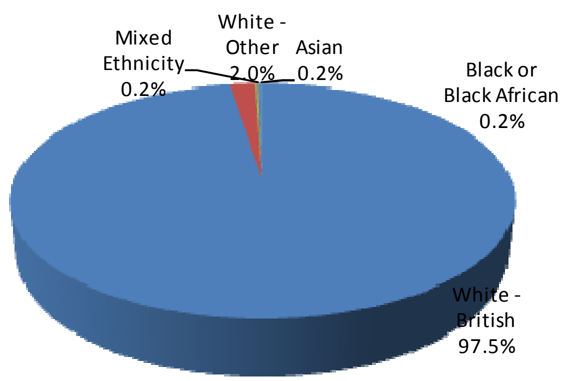


Table 16: Age profile of respondents visiting the South Downs

Age band	Base = 2,208
18-24 years	4%
25-34 years	8%
35-44 years	15%
45-54 years	20%
55-64 years	22%
65-74 years	22%
75+ years	9%
Total	100%

Note: the age reported is of the respondent and not the ages of all those who they typically visit the South Downs with

5.4.4 The age groups of residents who stated that they visited the South Downs for leisure/recreational purposes indicates a relatively mature profile. Almost three-quarters (73%) of all residents visiting the South Downs are aged between 45 years to 75 years and over. However the vast majority of visits are taken with other people, mostly family members and this will include children (see Table 17).

5.5 Group composition of visits

5.5.1 Just over a quarter of visits are made alone (27%) and a similar proportion of visits involve the company of a spouse. Just under a quarter are family outings involving parents and children (23%) and other family members and a similar proportion are visits made with both family and friends (22%).

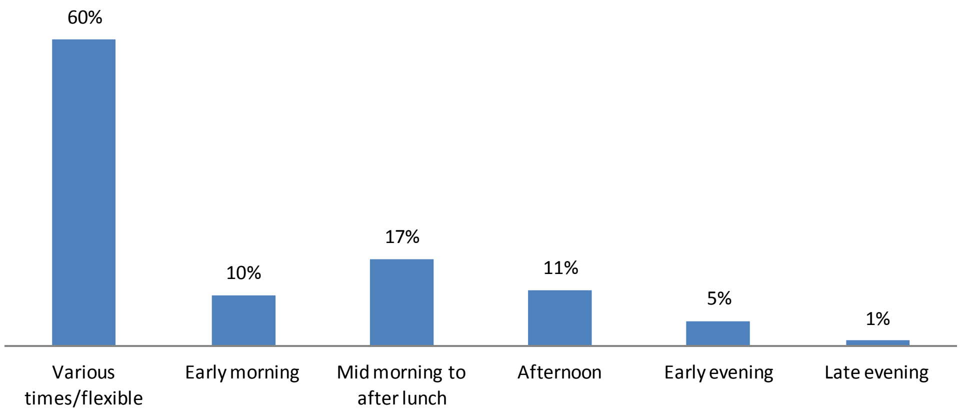
Table 17: Who visits are taken with

Who visited with	Base = 2,208
Alone	27%
With spouse	27%
Family/Children	23%
With family & friends	22%
Group of friends	6%
Members of club/association	2%
Work colleague	0%
Students	0%
Other	0%

5.6 Time of day most visited

5.6.1 The survey found no evidence that any particular time for visiting during the average day is more popular than other times. In total 60% of residents stated that they visit the South Downs at various times.

Fig. 11: Time of day South Downs visited



5.7 Location most visited

5.7.1 The majority of visits are taken to locations close to home. When asked to name the location of the place last visited in the South Downs for a leisure/recreational visit a total 157 different places were mentioned by residents. To assess the popularity of different locations by geographical distance, we have cross-tabulated the results by the county of residence. The top 20 locations mentioned are presented in Table 19 below. See Appendix 3 for a full list of responses.

5.7.2 For residents living in the Hampshire part of the South Downs, the most popular locations are St Catherine's Hill (very popular for dog walkers), followed by Queen Elizabeth Country Park and Petersfield.

5.7.3 The most popular locations for West Sussex residents are Petworth, Arundel, followed by Midhurst.

5.7.4 Residents living in the East Sussex part of the South Downs most frequently mentioned Lewes, Ditchling Beacon and Alfriston.

Table 18: Last location visited by county of residence (top 20)

Hampshire residents			West Sussex residents			East Sussex residents	
Base	1197		Base	604		Base	407
St Catherine's Hill	27%		Petworth	13%		Lewes	16%
QE Country Park	15%		Arundel	7%		Ditchling Beacon	11%
Petersfield	8%		Midhurst	6%		Alfriston	7%
Harting Down	6%		Cowdray Ruins	6%		Beachy Head	4%
Butser Hill	6%		Don't recall	5%		Stanmer Park	4%
Twyford Water Meadows	4%		Harting Down	4%		Devil's Dyke	4%
Old Winchester Hill	3%		The Trundle	4%		Birling Gap	4%
Midhurst	2%		Pulborough Brooks	3%		East Dean	3%
West Meon	2%		Petersfield	3%		Firle Beacon	3%
Petworth	1%		Amberley	3%		Don't recall	3%
South Harting	1%		Goodwood Country Park	3%		Seaford	3%
East Meon	1%		Chanctonbury Ring	3%		Seven Sisters Country Park	3%
South Downs Way	1%		Singleton	2%		Jack & Jill Windmills	2%
Itchen Abbas	1%		Weald & Downland	2%		Glynde	2%
Stansted Gardens	1%		Cissbury Ring	2%		Arundel	2%
Uppark House	1%		Bury Hill	2%		Ditchling village	2%
Arundel	1%		Bignor Hill	2%		South Downs Way	2%
Liss	1%		Heyshott Down	2%		Ringmer	2%
Selborne	1%		Cocking	1%		Fulking	2%
Singleton	1%		South Harting	1%		Hassocks	2%

5.8 Profile of residents not visiting the South Downs

5.8.1 Seven percent of local residents reported that they had not visited the South Downs within the last 12 months (148 out of 2,356). Most had visited the South Downs for a leisure or recreational visit sometime in the past. A third (31%) had visited previously over a year ago, a fifth had visited previously two years ago (20%) and small minority (6%) had previously visited three years ago[21].

[21] *Reference to the South Downs the designation, refers to the same geographical area covered by the designated national park boundary.*

Table 19: Last visit among residents who are lapsed visitors

When last visited	Base = 96
Over a year ago	31%
Two years ago	20%
Three years ago	6%
More than four years ago	43%

Note: Small sample size

5.8.2 In many instances, the previous visit was more than four years ago (43%). The actual proportion of residents who had never visited previously was actually very low. Only 2% out of the total sample of 2,356 have never visited the South Downs for a leisure/recreational visit despite living within the boundary.

5.8.3 The age profile of residents who either had not previously ever visited the South Downs for leisure and recreational purposes, or had not done so for some time, is indicated in all the age bands, though some age bands have a proportionately higher number of non/lapsed visitors than others. A fifth of non/lapsed visitors are aged 75 plus years, compared to only 9% of residents who visit the South Downs.

Table 20: Age profile of residents who are non-visitors/lapsed visitors

Age band	Base =148
18-24 years	10%
25-34 years	15%
35-44 years	13%
45-54 years	17%
55-64 years	15%
65-74 years	10%
75+ years	20%

Note: Small sample size

5.8.4 The higher incidence of older residents not visiting is strongly correlated with barriers to visiting which are connected to age specific reasons such as having problems walking around for too long and poor health (see section 5.9). Over a third (38%) of lapsed/non-visiting residents reported to have a long term health or disability issue which limits their daily activities.

Fig. 12: Socio-economic background of residents not visiting South Downs

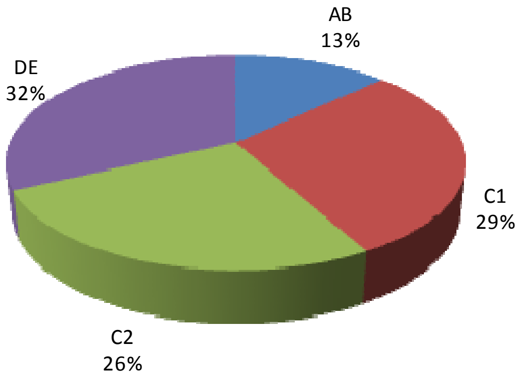
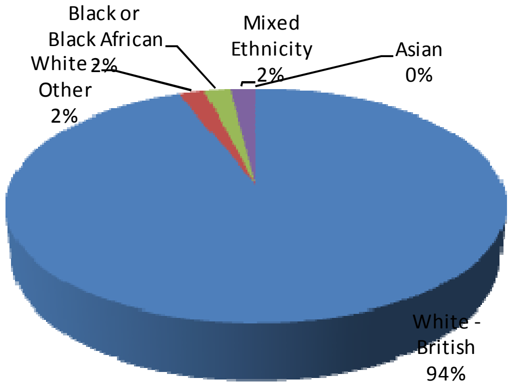


Fig.13: Ethnic background of residents not visiting South Downs



5.8.5 Compared to residents who visit the South Downs, non-visiting residents that were interviewed are more likely to be from C2DE socio-economic households. Overall 58% of non-visiting/lapsed visiting residents are from C2DE socio-economic households, compared to 32% of visiting residents.

5.8.6 The findings suggest that around 6% of non-visitors are residents with Black and Ethnic Minority origins. However, as we have noted earlier (see para. 5.4.2) the sample of residents with a non-white ethnicity who were interviewed was very small and this needs to be out into the context of the overall Black and Ethnic Minority population living in the South Downs which is very small.

5.9 Reasons for not visiting

5.9.1 Both lapsed visitors and those who have never visited the South Downs for a leisure visit were asked about the reasons for not visiting.

5.9.2 The top three reasons for not visiting are not having access to a car (27%), health issues (24%, this covers range of issues from having a bad back to being frail and having difficulty walking due to old age, to being in general poor health), and not having enough time (19%).

5.9.3 Around 14% of local residents reported that they had no particular reason for not visiting.

5.9.4 The proportion of local residents who reported they did not visit because they preferred to go elsewhere, do other things, or were simply not interested in the countryside was relatively small (accounting for 6% to 7% of non-visitors). For 5% of non-visitors perceived poor public transport was a barrier to visiting and three residents who were interviewed stated that places they might have considered visiting are simply too far to travel.

Table 21: Reasons among residents for not visiting

Reasons mentioned	Base = 148
No access to a car	27%
Health issues	24%
Lack of time	19%
Don't know/no particular reason	14%
Prefer to go elsewhere	7%
Prefer to do other things	7%
Not interested in the countryside	6%
Never heard of it/did not know about it	5%
Poor public transport	5%
Too far to travel	2%
Too many people/crowded	1%

Note multiple responses permitted and small sample size.

5.10 Actions which may encourage visits

5.10.1 Non and lapsed visiting residents were asked whether there was anything that could be provided or improved to encourage them to visit the South Downs. In total 54 different areas were mentioned by non/lapsed visitors, many of which were mentioned by only one or two respondents.

5.10.2 The top ten responses are listed below. See Appendix 4 for full list of responses.

5.10.3 Among this group there is a perception that visitor information along pathways is poor. The most frequently mentioned factor which would help to encourage visits among non-visitors/lapsed visitors is better signage on pathways including information boards providing maps. Seventy-five out of the 148 respondents mentioned this. It is worth noting here that the Environment Survey carried out among land managers highlighted an issue with general visitor information and signage along public rights of way (these findings are discussed in Section 7.5 of the report.

5.10.4 In addition to the perception of poor provision of visitor information along pathways was the view that pathways were in poor condition. Sixty-one out of the 148 respondents mentioned 'Better maintenance of pathways' when asked about provision or improvements which could be made which would encourage them to visit.

5.10.5 Sixty-six out of the 148 reported that the South Downs needed more dog bins and better provision with regard to dog bins would encourage them to visit. Again it is worth noting here that the Environment Survey identified that dog mess was a very common complaint among land managers and managers of conservation and cultural heritage sites in the South Downs (see section 7.5 and 7.6 in Chapter 7).

5.10.6 Improvements in public transport, so that the South Downs can be easily reached without the perceived need for a car was mentioned by 51 out of the 148 respondents.

5.10.7 Other responses in the top ten are more rubbish bins, extra car parking, more benches to sit on, better control of dogs and dog fouling, the provision of more toilets, and the emptying of rubbish bins more often.

Top 10 areas for improvements/improvements in provision which will encourage visits:

Better signage on pathways/more maps	*mentioned 75 out of the 148 respondents*
More dog bins	*mentioned 66 out of the 148 respondents*
Better maintenance of pathways	*mentioned 61 out of the 148 respondents*
Better public transport	*mentioned 51 out of the 148 respondents*
More rubbish bins	*mentioned 43 out of the 148 respondents*
Extra car parking	*mentioned 34 out of the 148 respondents*
More benches	*mentioned 33 out of the 148 respondents*
Better control of dogs/dog fouling	*mentioned 15 out of the 148 respondents*
Provide more toilets	*mentioned 15 out of the 148 respondents*
Empty rubbish bins more often	*mentioned 11 out of the 148 respondents*

6 VISITOR SURVEY RESULTS

6.1 Introduction

6.1.1 A comprehensive, face-to-face interview survey was undertaken to obtain information on the profile, origin, behaviour and perceptions of day and staying visitors to the South Downs. In addition to providing descriptive, attitudinal and behavioural data, the findings were used in the economic modelling work to assist in approximating total visitor volumes to the South Downs, their associated expenditure and their resultant economic impact. See Appendix 5 for copy of the *Visitor Survey Questionnaire*.

6.1.2 Visitors were sampled on a random basis at key locations across the South Downs National Park. As with the earlier 2003/4 study the interviews were undertaken at sites carefully selected to reflect the different type of users and the diverse landscape of the South Downs. In total 26 locations were selected as survey points.

6.1.3 As with the Resident Survey the survey period ran from October 2011 to September 2012 across weekdays and weekends, and between the hours of 10 am to 6 pm.

Table 22: Sample distribution among visitors

Survey locations	No. of interview days	Sample achieved	Proportion
Alfriston village	11	136	2%
Alice Holt Forest	22	341	5%
Arundel	20	273	4%
Beachy Head	20	341	5%
Birling Gap	29	477	7%
Chanctonbury/Steyning	10	204	3%
Devil's Dyke/Saddlescombe	24	409	6%
Ditchling Beacon/Jack & Jill windmills	10	136	2%
Firle Beacon/Bo Peep car park	10	68	1%
Harting Down	10	204	3%
Jane Austen's House/Chawton	17	341	5%
Kingley Vale, West Stoke	10	68	1%
Lewes	25	204	3%
Midhurst	25	204	3%
Old Winchester Hill	27	409	6%
Petworth	20	273	4%
Pulborough Brooks Reserve	16	204	3%
Queen Elizabeth Country Park	32	818	12%
Selborne	11	136	2%
Seven Sisters Country Park	32	409	6%
St Catherine's Hill	22	136	2%
Stansted House & Gardens	13	68	1%
The Trundle/Goodwood Country Park	15	136	2%
Twyford (lock and meadows)	9	68	1%
Weald & Downland Open Air Museum	23	545	8%
Whiteways cafe (Bury Hill)	14	204	3%
Total achieved sample	477	6815	100%

6.1.4 A sample of 7,000 visitors to the South Downs was the original target set. This sample size was deemed to be large enough to generate high levels of accuracy and allow sub-analysis for specific segments of the market. Interview sessions were severely hampered by the unprecedented spell of wet weather over the peak periods of April, June, July and August.

6.1.5 Despite the weather challenges, we reached close to the original sample target. The actual number of interviews successfully completed was 6,815 (compared to 7,437 completed in 2003/4).

6.1.6 To avoid any confusion which may arise, it is worth reiterating here that as one of the central purposes of the Visitor Survey was to gain insights into the ways in which the South Downs is used for leisure visits, the survey drew its sample from the total visiting population which also included local residents. Thus, in this Chapter, where useful, we have separated some results by resident visitors and visitors who reside outside the South Downs National Park boundary. References to residents in this Chapter should not be confused with the results presented in the previous Chapter.

6.2 Visit type

6.2.1 To assess the relative importance of holiday visits, leisure day visits, and other types of non-leisure based visits to the South Downs, visitors were asked to select the type of trip they were on based on the following categories:

- Visiting from home for a leisure day out
- Visiting as part of a holiday
- Visiting from home for a short trip (e.g. walk the dog)
- Visiting whilst seeing friends and/or relatives
- Visiting for work / business purposes
- Visiting for educational / study purposes

6.2.2 Just over half of all visitors are leisure day visitors (56%). A further 16% of visitors are also on a day visit from home and returning to their home on the same day, but these visitors are on a short visit, most likely to be local residents on informal leisure trips such as walking the dog.

Table 23: Breakdown of visit type

Visit type	Base = 6,815
Visiting from home for a leisure day out	56%
Visiting as part of a holiday	18%
Visiting from home for a short trip (e.g. walk the dog)	16%
Visiting whilst seeing friends and/or relatives	6%
Visiting for work purposes	2%
Visiting for education purposes	1%

Note: 6% of day visitors are South Downs residents

6.2.3 Holiday-makers make up 18% of those visiting the South Downs.

6.2.4 The proportion of people visiting the South Downs on a leisure/recreational visit whilst in the area to see friends is relatively small (accounting for 6% of all visits). Only a very small proportion of visits are for work or educational purposes (accounting for 3% of all visits).

6.2.5 Apart from holiday-makers, who are on a visit away from home, only a third of those visiting friends and relatives, or visiting for educational and work-related purposes involve staying away from home. Most of these visits are day trips.

6.2.6 Visit type alone cannot tell us about the relative proportion of visitors staying overnight in the South Downs, or the proportion of leisure visits made by local residents. Further cross-tabulation of the data by home residence, and in the case of holiday-makers, by location of accommodation base, reveals that only 5% of all overnight trips (a combination of holiday-makers and a proportion of those visiting friends and relatives) involve staying in accommodation in the South Downs. The vast majority of visitors on overnight trips stay elsewhere and can thus be described as 'day visitors staying in accommodation elsewhere'.

6.2.7 Distinguishing visitors by whether they live in the South Downs, are visiting for the day from elsewhere outside the South Downs, or are visitors staying overnight in the South Downs for holiday and other purposes is also critical for the estimation process involved in calculating the total volume of annual visits to the South Downs (this is presented in Chapter 8).

6.2.8 When we re-calculate the results to split the data by all visits involving a day trip and all trips involving an overnight stay in the South Downs, we see that 78% of visitors are on day trips from home (visiting from home, both in and outside the South Downs for a leisure day out as well as for short trips such as to walk the dog), 17% are visiting for the day whilst staying overnight outside the South Downs and the remaining 5% are on an overnight trip staying in the South Downs.

Table 24: Distribution between overnight and day visitors

	Proportion	Proportion
	2011/12	2003/4
Day visitor from home South Downs, of which:	78%	74%
Day visitors from homes outside South Downs	*72%*	*51%*
Day visitors from homes inside South Downs	*6%*	*23%* [1]
Day visitor from accommodation elsewhere	17%	22%
Overnight visitor in South Downs	5%	4%
Total	100%	100%

Note: [1] *Difference in classification of local residents in 2003/4 study*

6.2.9 Of the 78% of day visitors from home, only 6% are residents living in the South Downs. This may seem very low, but the relatively small resident population size of the South Downs needs to be put in the context of the large population of the urban conurbations of Hampshire, East and West Sussex closely surrounding the South Downs - the central catchment area generating visitors (see section 6.4 and Table 29 on visitor origins).

6.2.10 The combined resident population of Hampshire, East and West Sussex is 2,658,000 compared to only 110,400 within the South Downs, representing only 4% of the population from this wider catchment area.

6.2.11 That said, a further consideration is that the visitor survey is likely to undercount local residents, in that many of the leisure visits may be made 'out of working hours' when there was reduced survey activity (interviews typically took place between 10 am to 6pm), and that locals are likely to make use of a wider range of sites with local knowledge, including sites not included in the visitor survey.

6.2.12 The relative proportion of overnight visitors, leisure day visitors from outside the South Downs, and local resident visitors is different to that found by the 2003/4 visitor survey. However, it is very important to note that local residents were classified differently in the earlier visitor survey. All visitors living within a 10 mile radius of the South Downs location where they were interviewed at was included as a resident. This means a visitor from Horndean, Waterlooville visiting Queen Elizabeth Country Park (approximately 7.9 miles distance) would have been included as a local resident of the park despite the fact that Horndean is outside the park boundary.

6.2.13 In this study local residents are defined as those who live within the boundary of the South Downs National Park. Consequently, the proportion of local residents visiting the South Downs National Park for leisure purposes in this survey is lower than it would be if a wider local catchment (e.g. within 10 mile radius) was used.

6.3 Awareness of South Downs National Park designation by visitors

6.3.1 Just over three-quarters of visitors interviewed (77%) were aware that the place they were visiting is part of the South Downs National Park. Around a third were unaware of the national park status.

6.3.2 Awareness is highest among visitors who frequent the South Downs for short trips from home, who are most likely to be local residents or residents of neighbouring towns (88% of these visitors are aware of the designation).

Table 25: Visitor awareness by trip type

Base = 6,815	Aware	Not aware
Visiting as part of a holiday	64%	36%
Visiting whilst seeing friends and/or relatives	70%	30%
Visiting from home for a leisure day out	79%	21%
Visiting from home for a short trip (e.g. walk the dog)	88%	12%
Other visitor type	73%	27%

6.3.3 Of those aware of the designation, the most common reasons visitors believed it to be designated was the need to protect its special landscape and habitat/wildlife.

Table 26: Reasons for National Park designation

Reasons for designation	Base -= 6,815
It has special landscape which needs protection	43%
It has special habitat/wildlife which needs protection	33%
It needs special management to promote sustainable growth	15%
It has a unique cultural heritage which needs protection	14%
It has special archaeological interest which needs protection	12%
Not sure of reasons for designation/Don't know	24%

Note: Multiple responses permitted

6.4 Visitor profile

Visitor origin: domestic visitors

6.4.1 The visitor market is mainly domestic; 95% of all visitors are UK residents. In total visitors mentioned 50 different English counties as their main county of residence, indicating that visitors travel from all over England to visit the South Downs. Small numbers also travel from Scotland, Ireland and Wales. The top ten visitor origins among domestic visitors are presented in Table 27 below. The full list of visitor place of residence split by county is available in Appendix 6.

6.4.2 Just under a third (29%) of all visitors live in towns, cities and villages in Hampshire. A fifth are residents of West Sussex and 17% are residents of East Sussex. Overall, 66% of all visitors come from residences located within these three counties.

6.4.3 Around 1 in 10 visitors live in Surrey and around 5% are London residents.

6.4.4 Visitor origins differ by the type of trip with holiday-makers coming from a wide geographical remit, with no one place of origin dominating, whilst day visitors from home came mainly from East Sussex, Hampshire and West Sussex.

Table 27: Top 10 domestic visitor origins (by county) – all visitors

County of residence	Base = 6,474
Hampshire	29%
West Sussex	20%
East Sussex	17%
Surrey	10%
Greater London	5%
Kent	3%
Essex	2%
Berkshire	1%
Somerset (including Bristol)	1%
Hertfordshire	1%

Note: table represents top 10 counties visitors come from

Table 27(a) Top 10 domestic origins for visiting as part of a holiday

County of residence	Base =1,165
London	12.2%
Kent	7.4%
Surrey	7.2%
Essex	6.2%
East Sussex	5.2%
Hampshire	4.6%
West Sussex	3.3%
Hertfordshire	3.3%
West Midlands	3.3%
Berkshire	2.5%

Note: table represents top 10 counties visitors come from

Table 27(b) Top 10 domestic origins for visiting whilst seeing friends and/or relatives

County of residence	Base = 388
West Sussex	13.0%
Hampshire	12.4%
East Sussex	11.3%
Greater London	9.6%
Surrey	7.6%
Kent	5.6%
Somerset (including Bristol)	3.7%
Dorset	2.5%
Essex	2.3%
Oxfordshire	2.3%

Note: table represents top 10 counties visitors come from

Table 27(c) Top 10 domestic origins for visiting from home for a leisure day out

County of residence	Base = 3,626
Hampshire	36%
West Sussex	22%
East Sussex	18%
Surrey	13%
Greater London	4%
Kent	3%
Berkshire	1%
Essex	1%
Dorset	<1%
Oxfordshire	<1%

Note: table represents top 10 counties visitors come from

Table 27(d) Top 10 domestic origins for visiting from home for a short trip

County of residence	Base = 1,036
Hampshire	35%
West Sussex	30%
East Sussex	26%
Surrey	4%
Greater London	2%
Kent	1%
Berkshire	1%
Essex	<1%
Dorset	<1%
Oxfordshire	<1%

Note: table represents top 10 counties visitors come from

Table 27(e) Top 10 domestic origins for other visit type (i.e. educational or work related)

County of residence	Base = 194
West Sussex	25%
Hampshire	23%
East Sussex	21%
Surrey	11%
Greater London	6%
Kent	6%
Somerset (including Bristol)	1%
Devon	1%
Buckinghamshire	1%
Cambridgeshire	1%

Note: table represents top 10 counties visitors come from

Visitor origin: overseas visitors

6.4.5 Five percent of South Downs visitors (holiday makers and visiting friends and relative visitors) are from overseas, similar to the proportion found in 2003/4. In total, these visitors represented 44 different overseas countries. The top ten overseas countries is presented in Table 28 below (full list is available in Appendix 7).

Table 28: Top 10 overseas visitor origins

Country of residence	Base = 324
Germany	16.9%
Netherlands	14.2%
Australia	9.5%
France	9.2%
United States	8.0%
Belgium	5.5%
Switzerland	3.1%
Italy	2.8%
New Zealand	2.2%
Japan	2.2%

Note: table represents top 10 counties visitors come from

Visitor socio-economic profile

6.4.6 The survey findings indicate a small increase in the proportion of people visiting the South Downs from C2 socio-economic households; the proportion has increased from 15% in 2003/4 to 21% in 2011/12. However, the proportion of visitors from DE households remains the same at 7% and the majority of visitors continue to be from ABC1 households.

Table 29: Visitor socio-economic background

Occupational status	Proportion	Proportion
	2011/12	2003/4
AB	35%	32%
C1	37%	46%
C2	21%	15%
DE	7%	7%
Total	100%	100%

Visitor age profile

6.4.7 Only 3% of visitors reported to have a health or disability issue which impairs their daily activities, despite the fact that 18% are over the age of 65 years (of which 4% are 75 years and over).

6.4.8 Overall the age profile has not changed significantly since 2003/4. The ages which can be seen to constitute the family market (ages 0 to 44 years, typically parents with young children) make up 46% of visitors, the same as in 2003/4.

Table 30: Visitor age profile

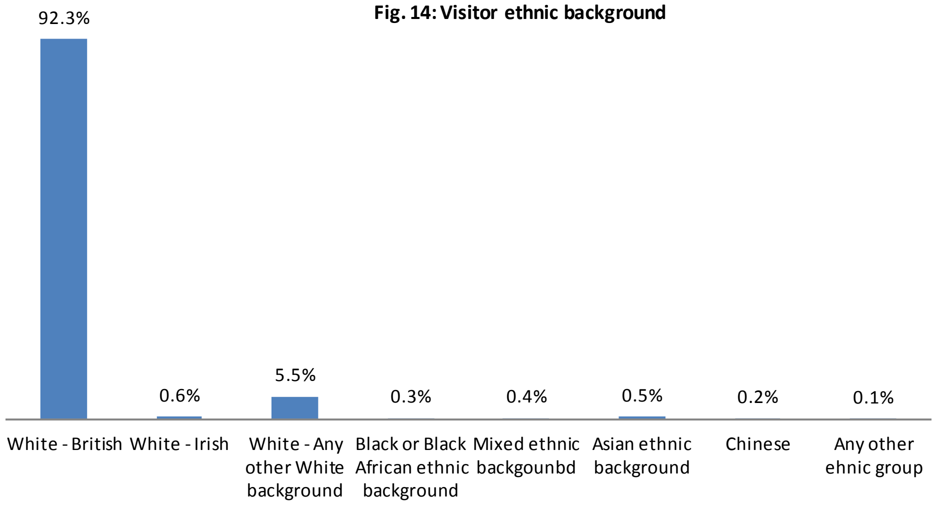
Age	Proportion	Proportion
	2011/12	2003/4
0-15 years	23%	20%
16-24 years	6%	5%
25-34 years	8%	8%
35-44 years	9%	13%
45-54 years	17%	14%
55-64 years	20%	16%
65-74 years	13%	20%
75+ years	4%	4%
Total	100%	100%

6.4.9 As in 2003/4 around 54% of visitors are aged 45 years to 75 years or more.

Visitor ethnic profile

6.4.10 The survey results indicate a very small increase in the proportion of visitors from the ethnic minorities. In the 2003/4 survey they constituted less than 1% of all visitors. The 2011/12 survey finds that 2% of visitors are from the ethnic minorities.

Fig. 14: Visitor ethnic background



6.5 Overnight visits

6.5.1 Overall a fifth of all visitors were visiting the South Downs whilst staying away from home. It was established earlier that of these visitors, only 5% stayed overnight in the South Downs itself. The vast majority stayed elsewhere outside the South Downs.

6.5.2 The 17% of visitors identified as visiting on day trip excursions whilst staying overnight elsewhere generally stay close by in neighbouring towns and cities in Hampshire, West and East Sussex. A small proportion visit for a day trip whilst staying overnight further afield in Surrey, London, and Kent.

6.5.3 On average, overnight visits spent in the South Downs last a duration of 5 nights, which is the same average length of stay reported in the 2003/4 study. Those staying outside the South Downs, tend to have slightly shorter trips, an average of 4 nights.

6.6 Factors influencing visits

6.6.1 The visitor survey found that the most popular main reason for visiting the South Downs among visitors is to go for a walk (29%, compared to 25% in 2003/4 when it was also the most popular main reason). Walking is closely followed by a visit to a tourist attraction or place of interest (19% compared to 24% in 2003/4).

Table 31: Main and other/secondary reasons for visiting the South Downs

Main and Other reasons for visiting		Base = 6,815
	Main	**Other**
Go for a walk	29%	28%
Visit an attraction	19%	10%
Get fresh air/enjoy great views	9%	56%
Take the dog for a walk	8%	7%
Meet up with friends/family	5%	17%
Visit a tea room/restaurant	4%	44%
Walk or ride the South Downs Way	3%	6%
Relax and find peace/tranquillity	3%	35%
Cycle around	3%	6%
Attend an event	3%	5%
Have a picnic	2%	17%
Go on a special shopping trip	2%	4%
Observe wildlife/fauna & flora	2%	24%
Get to easily from home/close to home	1%	20%
Visit a pub	1%	18%
Take part in other sports	1%	1%
Go to be inspired and generally feel better at end	<1%	26%
Find amenities like public loos/ice cream van	<1%	14%
Ride my/a horse	<1%	1%
Go canoeing/other watersports	<1%	<1%
Go fishing	<1%	1%
Go paragliding/hang gliding	<1%	<1%
Other [1]	2%	1%

Note: A small number of people gave other reasons for visiting such as visiting for nostalgic, personal reasons.

6.6.2 The most popular secondary reasons for visiting the South Downs are to get fresh air/ enjoy great views (56%), visit a tea-room or restaurant (44%) and relax and find peace/tranquillity (35%).

6.6.3 Results split by trip type indicate that there are some differences in the main reasons for visiting the South Downs between holiday makers, those visiting as part of a visiting friends and relatives trip and day visitors. The top five main reasons split by the 4 main visitor types are presented overleaf. See Appendix 8 for full results split by visitor type.

Visiting as part of a holiday	
Visit an attraction	29%
Go for a walk	22%
Get fresh air/enjoy great views	15%
Walk or ride the South Downs Way	8%
Relax and find peace/tranquillity	5%

Visiting whilst seeing friends and relatives	
Meet up with friends/family	33%
Go for a walk	23%
Visit an attraction	14%
Get fresh air/enjoy great views	7%
Take the dog for a walk	4%

Visiting from home for leisure day out	
Go for a walk	31%
Visit an attraction	22%
Get fresh air/enjoy great views	9%
Take the dog for a walk	5%
Meet up with friends/family	4%

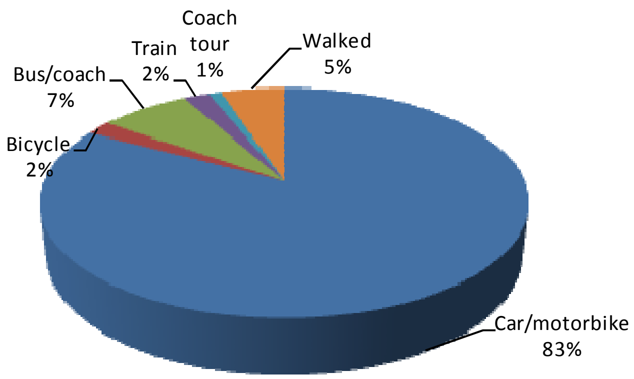
Visiting from home for short trip	
Go for a walk	35%
Take the dog for a walk	29%
Get fresh air/enjoy great views	6%
Meet up with friends/family	3%
Relax and find peace/tranquillity	3%

6.6.4 The results on the main reasons for visiting are similar to the 2003/4 study findings. The earlier survey found that the most popular main reason for visiting the South Down was to go for a walk (25%). Walking was closely followed by a visit to a tourist attraction or place of interest (24%) and relaxing/ enjoying the view (19%) as primary motivations for visiting. The most popular secondary reasons for visiting the South Downs were to relax/ enjoy the view/picnic (44%); go for a walk (37%); and visit a pub or tea-room (33%).

6.7 Mode of transport used

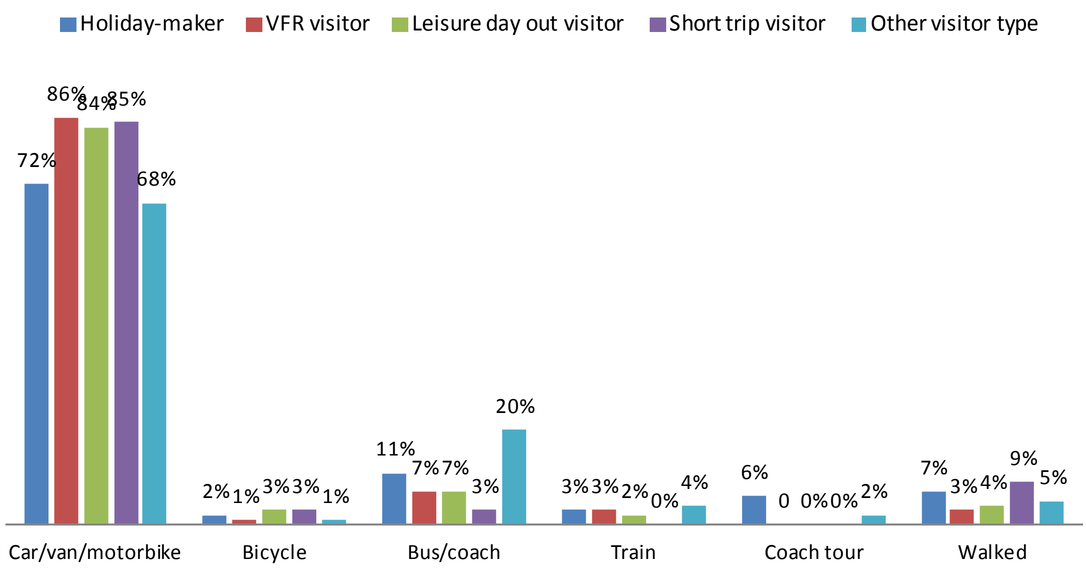
6.7.1 Eighty-three percent of all visitors had travelled to the South Downs by private motor vehicle, similar to the proportion who travelled by private motor vehicle in 2003/4 (84%).

Fig. 15: Mode of travel



6.7.2 The proportion of visitors on an overnight trip travelling by private motor vehicle is lower than day visitors. Eighty-four percent of visitors travelling from home for a leisure day out arrived by private motor vehicle, compared to only 72% of holiday-makers. Interestingly car use is high among visitors living in or close to the South Downs who visit for short trips, such as trips to walk the dog. Eighty-five percent of visitors travelling from home for a short trip arrive by private motor vehicle.

Fig. 16: Mode of travel by visit type



6.7.3 In 2003/4 81% of visitors reported that convenience was the main reason for their choice of transport, which in the vast majority of incidences were given by those travelling by private motor vehicle. Convenience was the top reason mentioned by visitors interviewed during the 2011/12 survey, but a lower proportion gave this reason (58%).

6.7.4 Around a quarter of visitors (23%) reported that their choice of transport was driven by their belief that there was no alternative mode of transport to reach the South Downs.

Table 32: Reasons for transport choice

Reasons mentioned	Base 6,815
Convenience	58%
No real alternative	23%
Ease of access	17%
Time/speed	8%
Health benefits	6%
Cost	4%
Safety - travelling alone/with children	4%
Environmentally friendly	3%
Part of a coach tour	2%
Don't own a car/have access to a car	2%
Inadequate public transport services	2%
Not aware of public transport services	1%
Best suited for these road conditions	0%
Other	2%

6.7.5 Only a fifth of visitors arriving by private motor vehicle (22%) stated that they would consider an alternative mode of travel. The majority did not feel it would be convenient to change their main mode of travel.

6.8 Frequency of visits

6.8.1 To establish the frequency of visits to the South Downs and assess the impact of seasonality of trip-taking, visitors were asked to think about their visits to the South Downs over the course of a year, and indicate how often they make a leisure-related visit over each of the four seasons of the year.

6.8.2 The results have been amalgamated to establish frequency of trips over the course of the year (see Table 33) and are also represented separately for each season (see figures 17 to 20).

6.8.3 The vast majority of visitors have visited the South Downs previously. Only 7% are first time visitors. One in 10 visits the South Downs for leisure/recreational visits every day and a further 8% visit several times a week. These frequent visitors are most likely to be local residents or visitors living very close to the South Downs boundary.

6.8.4 It is important to note when interpreting the data presented in Table 33 that previous visits can be any type of leisure visit. So for example, a holiday-maker may visit the South Downs once each season (up to 4 times a year), but these visits may be day trips from home, or maybe visits to see friends and relatives in the area, as well as other overnight holiday visits. Likewise, a day visitor on a leisure trip from home may visit the South Downs for other trip purposes including seeing friends and relatives or visit as part of an overnight holiday.

Table 33: Frequency of visits per year

Base = 6,815	Visitor type				
Frequency of visits	All	Visiting as part of a holiday	Visiting whilst seeing friends and/or relatives	Visiting from home for a leisure day out	Visiting from home for a short trip
Every day	10%	0%	0%	10%	14%
Several times a week	8%	2%	2%	7%	16%
About once a week	13%	1%	7%	15%	16%
About once a month	22%	8%	21%	26%	20%
About twice a month	12%	4%	10%	14%	14%
Once over each season (4x year)	19%	28%	32%	18%	13%
Can't recall frequency - varies	9%	27%	15%	5%	5%
Once so far/visiting for the first time	7%	30%	13%	4%	2%

6.8.5 Holiday-makers are more likely to be visiting for the first time (30% visiting for the first time) and are less frequent visitors.

6.8.6 Those visiting for a leisure day out or a short trip from home have a higher trip frequency pattern; with short trip visitors being the most frequent visitors. Seventeen percent of leisure day visitors and 30% of short trip visitors reported they visit the South Down National Park every day to several times a week.

6.8.7 To assess the influence of seasonality on trip taking, all visitors interviewed were asked to state the frequency of visits during each of the four seasons (spring, summer, autumn and winter). The results indicate very clearly that leisure visits take place all year round.

However, there are some notable differences in the seasonality of visits among the four main visitor types.

6.8.8 Holiday-makers are most likely to visit the South Downs in the summer months; 57% visit at least once during the summer, compared with 26% visiting at least once over the winter. Just over half of all holiday-makers (57%) also reported that they are unlikely to visit over the winter. Visiting at least once each season was the most common response from VFR visitors. Overall, visitors of a leisure day out and those visiting for short trips show less variation in trip-taking between the seasons compared to holiday-makers.

Fig 17: Frequency of visits among holiday-makers by season

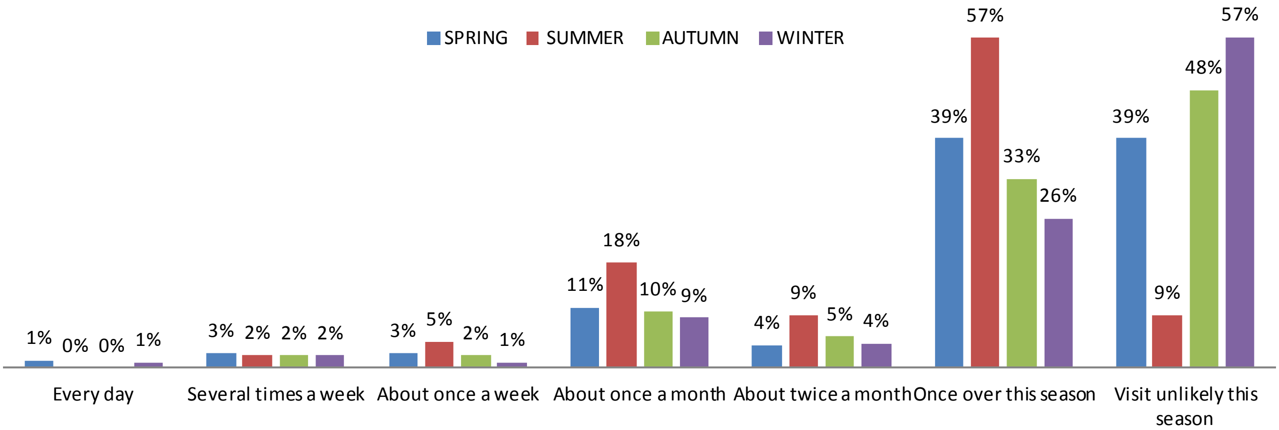


Fig 18: Frequency of visits among VFR visitors by season

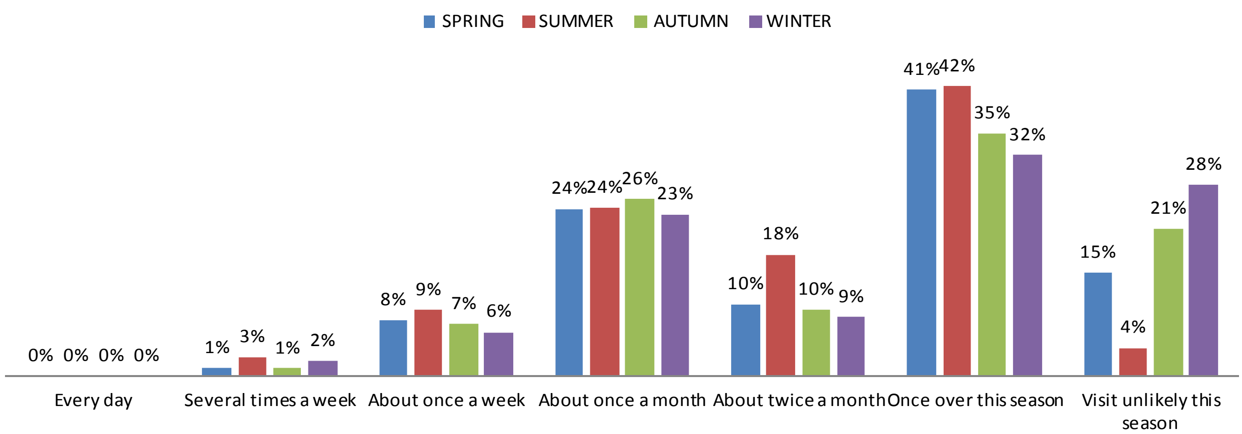


Fig 19: Frequency of visits among Leisure day visitors by season

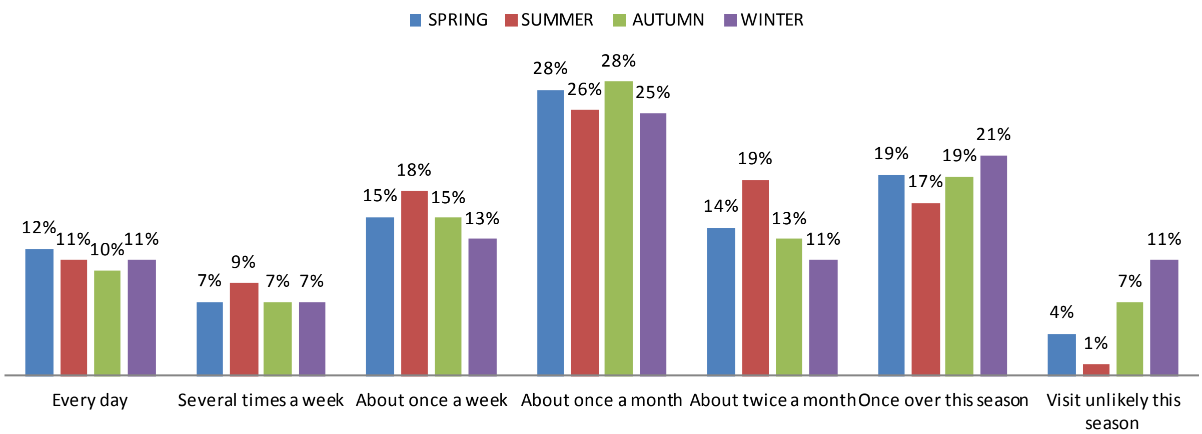
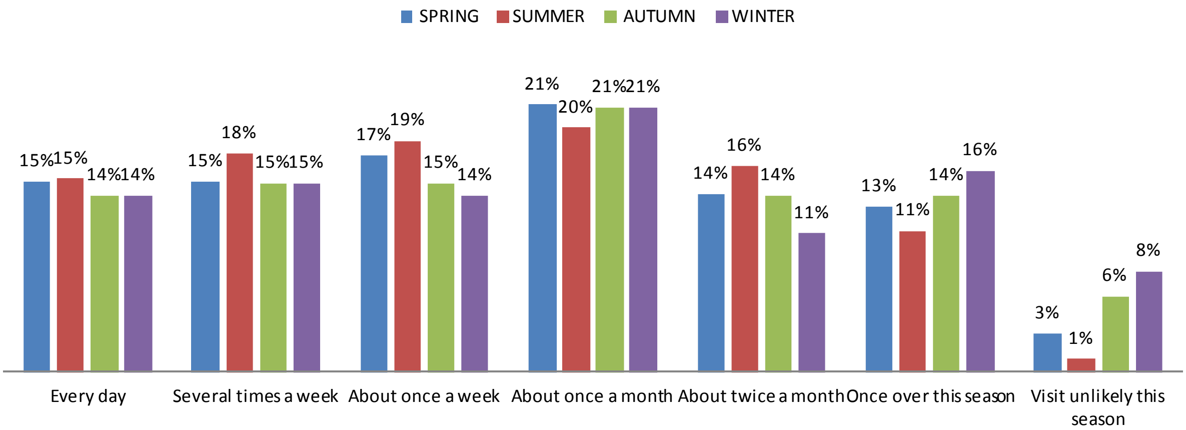


Fig 20: Distribution of visits among short stay day visitors by season

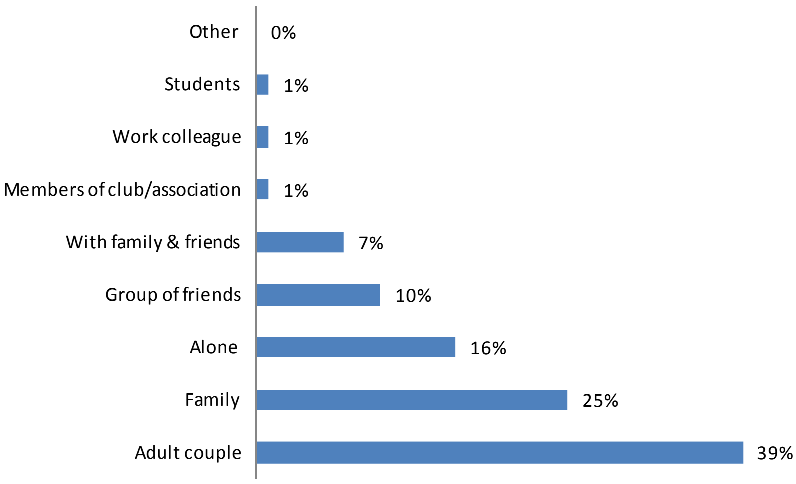


6.9 Group composition

6.9.1 The most popular group composition is an adult couple (39%). Forty-two percent of visitors are visiting with family, groups of friends or with family and friends. Sixteen percent are visiting alone, and 3% are visiting with an organised group or club, with work colleagues or students.

6.9.2 The average group size is 2.7 persons.

Fig. 21: Group composition



6.9.3 There are some differences in group composition between visit type. Those on holiday are more likely to be visiting as a party of two people (mostly an adult couple/spouse). Visitors on a leisure day out have a slightly higher proportion of families.

6.9.4 The results for group composition are similar to those found in 2003/4.

Table 34: Group composition by visit type

Base =	Visitor type				
Number of adults & children	Holiday-maker	VFR visitor	Leisure day out visitor	Short trip visitor	Other visit type
One adult	9%	18%	16%	26%	56%
2 adults	60%	34%	46%	46%	21%
3 adults	6%	12%	7%	5%	2%
4 adults	6%	9%	3%	3%	3%
5 or more adults	3%	3%	1%	1%	7%
Adult only groups	*84%*	*76%*	*73%*	*81%*	*89%*
1 adult & 1 child	1%	1%	2%	3%	0%
1 adult & 2 or more children	0%	2%	3%	2%	2%
2adults & 1child	3%	3%	6%	3%	0%
2 adults & 2 or more children	6%	7%	10%	6%	2%
3 adults & 1 child	2%	2%	1%	1%	1%
3 adults & 2 or more children	1%	5%	3%	2%	0%
4 or more adults & 1 or more children	2%	5%	3%	2%	4%
Adults with children	*15%*	*25%*	*28%*	*19%*	*9%*

Note: Percentage may not sum to 100% due to rounding

6.10 Visitor expenditure

6.10.1 The average expenditure per head figures presented in Table 35a and Table 35b are produced simply by dividing the total expenditure incurred by a visiting group by the number of people in the group. It includes visitors who did not spend any money on the categories of expenditure listed. So for example, the average expenditure on attractions, including those who did not spend any money on this category is £1.51. If we exclude those who spent nothing on attractions, it raises the average expenditure on attractions per visitor per trip to £4.08. Arguably, this is relatively low and reflects the high number of free attractions in the South Downs.

6.10.2 On average visitors spend £10.24 per person during their visit to the South Downs. Visitors staying overnight on holiday in the South Downs spend relatively more than other visitor types. Holiday-makers spend an average of £14.93 per person per day. The lowest average visit expenditure is among local visitors living in the South Downs; average spend per person per visit is only £5.50.

6.10.3 Those staying overnight, which accounts for around 5% of visits to the South Downs, spend on average a further £119.68 on accommodation per person over the duration of their stay, or £23.94 per person per night (based on average stay of 5 nights)[22]. Thus, a holiday maker staying in the South Downs will spend an average of £194.33 over a stay of 5 nights (or £38.87 per person per day including expenditure on food and drink,

[22] This accommodation expenditure is an average across all types of accommodation (both paying and non-paying). Some visitors will have stayed overnight in commercial accommodation and pay for their accommodation. The survey results indicate that 86% of holiday-makers staying overnight in the South Downs paid for their accommodation. The remaining 14% stayed in non-paying accommodation including the homes of friends and relatives and in second homes. The average accommodation expenditure among those paying for their expenditure is £143.33 per person per trip, or £28.67 per person per night. The average expenditure across all categories of accommodation (both paid for and free) is £23.94 per person per night.

shopping, transport and entertainment). Once again, it should be noted that the average expenditure figure includes those who did not spend anything on accommodation costs.

6.10.4 The results on expenditure on accommodation reveal that 35% of visitors interviewed who were staying overnight in the South Downs stated that they had not incurred any accommodation costs as they were staying with friends/relatives. Thus, two-thirds of visitors staying overnight in the South Downs incurred additional expenditure on accommodation.

Table 35(a): Average visitor expenditure per person per day

Base = 6,815	Visitor type					
	All	Holiday-maker	VFR visitor	Leisure day out visitor [1]	Short trip day visitor [2]	Resident visitor
Visit attractions	£1.51	£2.54	£1.67	£1.53	£0.19	£0.58
Food and drink	£4.72	£7.23	£5.95	£4.27	£3.24	£2.61
Transport	£1.96	£2.58	£3.01	£1.86	£1.17	£1.17
Shopping	£1.90	£2.45	£2.03	£1.71	£2.01	£1.13
Activities	£0.15	£0.14	£0.07	£0.11	£0.38	£0.01
Total average spend	**£10.24**	**£14.93**	**£12.74**	**£9.48**	**£8.91**	**£5.50**

Note: [1] and [2] expenditure are for day visitors residing outside the South Downs National Park.

Table 35(b): Additional overnight accommodation expenditure

Base 272	All accommodation	Paid for only
Avg. spend per trip per person	£119.68	£143.33
Avg. spend per 'visitor day' per person	£23.94	£28.67

6.11 Sources of information used to plan visits

6.11.1 As in 2003/4 a large proportion of visitors do not use any formal source of information to plan their visit (66% compared to 70% in 2003/4). Among the visitors who do consult official sources, most use the internet (17%) followed by maps (12%). When analysed by visit type, holiday-makers had a far higher usage (34%) of the web to find out about information than day visitors. See results presented in 6.11.4 to 6.11.7.

Table 36: Information sources used prior to visit

Information sources mentioned	Base = 6,815
Did not use any/relied on personal knowledge	66%
Websites	17%
Maps	12%
Specialist publications	7%
Friends/relatives/contacts	7%
Satellite Navigation/GPS device	6%
Signage	4%
Printed press	3%
Visitor Information Centre	3%
Social media networks	1%
Mobile phone app	1%
Radio/TV	0%
Other	2%

6.11.2 Results split by visitor type indicate some differences in whether or not information on the South Downs tends to be consulted prior to the trip or not and what type of information is reviewed. The top most frequently mentioned responses are presented below. See Appendix 9 for full list of information consulted split by visitor type.

6.11.3 Among holiday-makers the five most frequently mentioned responses are:

Websites	*34%*
Did not use any/relied on personal knowledge	*29%*
Maps	*25%*
Specialist publications	*16%*
Friends/relatives/contacts	*12%*

6.11.4 Among visiting friends and relatives visitors the five most frequently mentioned responses are:

Did not use any/relied on personal knowledge	*54%*
Friends/relatives/contacts	*32%*
Websites	*16%*
Maps	*9%*
Specialist publications	*5%*

6.11.5 Among leisure day visitors the five most frequently mentioned responses are:

Did not use any/relied on personal knowledge	*74%*
Websites	*14%*
Maps	*10%*
Specialist publications	*5%*
Satellite Navigation/GPS device	*5%*

6.11.6 Among short stay day visitors the five most frequently mentioned responses are:

Did not use any/relied on personal knowledge	*88%*
Maps	*7%*
Websites	*5%*
Signage	*2%*
Friends/relatives/contacts	*2%*

6.12 Impact on health and well-being

6.12.1 A number of areas of enquiry were more qualitative in nature in that the survey involved delving into visitor's opinions and perceptions (see Chapter 7 for views on visitor impacts). This included a question on the impact of visits to the South Downs on the visitor's general health & well-being. The terms could refer to physical fitness, feeling spiritually uplifted, or / and an improved mental state.

6.12.2 The survey results show that over half of all visitors (57%) reported that visits to the South Downs are "Very important" to their health and sense of well-being. A further third (34%) rated the importance of visits to the South Downs on health and well-being as "Important".

Table 37: Rating of importance of visits to SDNP on health and sense of well-being

Rating	6,815
Not very important	4%
Not important	5%
Important	34%
Very important	57%

6.13 Overall satisfaction with visit

6.13.1 Overall, the level of visitor satisfaction is high.

6.13.2 Nearly everyone interviewed rated their satisfaction as either “Very good” or “Good”. No one rated their overall satisfaction as “Poor” or “Very poor”.

Table 38: Overall trip satisfaction

Scale	6,815
Very good	77%
Good	22%
Average	1%
Poor	0%
Very poor	0%

6.14 Organised and educational visits to the South Downs

6.14.1 To gather insights into the frequency of organised trips social, youth, activity-based (i.e. rambling) and other types of groups to the South Downs, just under 600 social groups[23] were invited to take part in an online survey.

6.14.2 Unfortunately only 14 Hampshire and Sussex based social groups took part in the survey. Of these, only 11 arranged visits to the South Downs. Given the response rate, the results are not representative and thus are not useful for this study[24].

6.14.3 As with the organised visit survey, the educational visit survey was carried out to provide insight into the frequency of trips made by schools, indications on group size and popular places visited.

6.14.4 In total 922 schools across Hampshire, East and West Sussex were invited to an online survey of which 74 took part (a response rate of 8%). The response rate was disappointing but reflects the time constraints faced by busy head teachers.

[23] *In total 43 groups were identified as being located within the boundaries of the South Downs. However, as it is likely many groups, particularly activity-based and special interest groups such as environmental/conservational groups based elsewhere in neighbouring towns are also likely to visit, we extended the geographical remit to include other towns in Hampshire, Sussex, as well as in Surrey and Kent. Around 3,000 groups were identified; however, email addresses were only available for around 600 of these groups.*

[24] *On reflection, we have come to appreciate that these types of social / special interest groups are not well suited to online surveys.*

6.14.5 Based on the findings of the survey (with caveats added given the low response rate), some 60% of schools across Hampshire, East and West Sussex arrange school trips to the South Downs.

6.14.6 Group size tends to be large; around 30 to 40 including school children, teachers and support staff. Trips to the South Downs also tend to involve a full school day.

6.14.7 Expenditure on-site in the South Downs is generally very low. Just over half of school heads reported that nothing was spent during the school trip. What expenditure did take place tended to be up to the value of £2 per person per visit.

7 VIEWS ON TOURISM IMPACTS

7.1 Introduction

7.1.1 In addition to gathering descriptive data on the profile of visitors and key features of their visits, both the Resident and Visitor Surveys also included questions designed to gain insight into how residents and visitors travelling from outside perceive the impact of visits to the South Downs National Park. This included examining from their perspective:

- The positive elements of visits;
- The negative elements of visits;
- What they think are the best solutions to resolving local visiting issues;

7.1.2 In parallel to the Resident and Visitor Survey, the Environment Survey examined the impacts visitors have on the landscape, biodiversity and cultural heritage of the South Downs from the perspective of land managers and managers of nature conservation and cultural heritage sites[25]. Key results from all three surveys on visitor impacts are presented in this chapter.

7.2 Resident and visitor views on tourism impacts

7.2.1 To gauge views on the positive and negative elements of leisure visits to the South Downs, residents and visitors were asked to read four statements (two positive and two negative) about visitor impacts and asked to indicate whether they agreed or disagreed using the following scale: Strongly disagree, Disagree, Agree, and Strongly agree. A further 'don't know' or 'neither agree/disagree option was also available.

7.2.2 The views on visitor impacts indicate a high level of support for visits to the South Downs. Three-quarters (74%) of local residents "Agree" with the statement that visits to the South Downs creates income and jobs for the local economy through visitor expenditure and a further 16% "Strongly agree" with this statement.

7.2.3 Around a fifth (20%) of local residents "Disagree" or "Strongly disagree" with the statement that visits to the South Downs helps preserve rural services like buses, village shops and post offices. The majority (80% in total), however, "Agree" or "Strongly agree" with this statement.

7.2.4 A significant proportion of local people do, however, feel that visits cause some level of damage to the landscape. Over a third of residents (37% in total) "Agree" or "Strongly agree" with the statement that visits to the South Downs cause damage to the landscape: dog fouling, litter, erosion, fires, disturbance to livestock, vandalism. Most (63%), however, "Disagree" or "Strongly disagree" with this statement.

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[25] *The Environment survey involved undertaking two quantitative surveys: one with land managers of primarily privately owned or tenanted land, the other with specific nature conservation and cultural heritage sites.*

7.2.5 Around a quarter of local residents believe that visits cause traffic congestion and pollution. Whilst this is a significant minority, most local residents (73%) did not perceive this to be a problem.

Table 39: Resident views on impacts

Base = 2208	Strongly disagree	Disagree	Agree	Strongly agree
Visits to the South Downs creates income and jobs for the local economy through visitor expenditure	0%	9%	74%	16%
Visits to the South Downs helps preserve rural services like buses, village shops and post offices	1%	19%	62%	18%
Visits to the South Downs cause damage to the landscape: dog fouling, litter, erosion, fires, disturbance to livestock, vandalism	6%	57%	33%	4%
Visits to the South Downs causes traffic congestion and pollution	5%	68%	23%	3%

Note: Results exclude the small number of people who gave 'don't know/neither agree or disagree.

7.2.6 Interestingly visitors interviewed on-site during their visit to the South Downs appear to see the potential for more harm caused to the South Downs as a result of their visits than local residents. Although in total 64% of visitors "Agree" or "Strongly agree" with the statement that visits to the South Downs creates income and jobs for the local economy through visitor expenditure, this is lower than the 90% of residents who either "Agree" or "Strongly agree" with the statement.

7.2.7 Visitors are more positive about the role visits to the South Downs play in helping to preserve rural services like buses, village shops and post offices. In total 97% of visitors either "Agree" or "Strongly agree" with this statement (compared to 80% of residents who agree or strongly agree).

7.2.8 A very high proportion of visitors (89%) either "Agree" or "Strongly agree" that visits to the South Downs cause damage to the landscape: dog fouling, litter, erosion, fires, disturbance to livestock, vandalism. This compares to only 37% of residents either agreeing or strongly agreeing with this statement.

7.2.9 Finally, 38% of visitors either "Agree" or "Strongly agree" with the statement that visits to the South Downs cause traffic congestion and pollution, compared to 26% of residents. Around two-thirds (62%), however, disagree with the statement that visits cause traffic congestion and pollution.

Table 40: Visitor views on impacts

Base = 6815	Strongly disagree	Disagree	Agree	Strongly agree
Visits to the South Downs creates income and jobs for the local economy through visitor expenditure	3%	34%	54%	10%
Visits to the South Downs helps preserve rural services like buses, village shops and post offices	0%	3%	79%	18%
Visits to the South Downs cause damage to the landscape: dog fouling, litter, erosion, fires, disturbance to livestock, vandalism	0%	11%	72%	17%
Visits to the South Downs causes traffic congestion and pollution	4%	58%	35%	3%

Note: Results exclude the small number of people who gave 'don't know/neither agree or disagree.

7.3 Resident and visitor views on actions to influence visitor behaviour

7.3.1 Residents and visitors were asked about what actions they believed would influence visitor behaviour so as to protect the wildlife and special landscape of the South Downs (e.g. encourage visitors to be careful around sensitive sites such as where there are ground nesting birds). As with the question on visitor impacts, responses to a series of statements were gathered. Residents and visitors were asked whether they believed the following 9 actions were Very unlikely, Unlikely, Likely or Very unlikely to influence visitor behaviour in the desired way.

- The imposing of lower speed limits in vulnerable areas
- Putting up signs signalling what visitors should or shouldn't do
- Getting South Downs rangers to talk to visitors
- Producing printed information such as books and leaflets
- Putting information on websites and social networks
- Awareness raising through guided walks
- Awareness raising through local forums
- Keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas
- Closing car parks at times of the year when animal or plant species are vulnerable

7.3.2 Overall, there was support for all 9 actions, though some were deemed to be more influential than others.

7.3.3 The results indicate strong support for keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas. In total 66% of local residents felt that well-maintained footpath was “Very likely” to influence people’s behaviour to protect the South Downs and a further 32% felt this action was “Likely” to influence behaviour in the desired way (98% in total felt it would change behaviour in a positive way). Thus only 2% felt that it would not be useful.

7.3.4 The two other actions which got a high level of support were getting South Downs rangers to talk to visitors and putting information on websites and social networks. In total just over 91% of local residents felt these actions would have a positive influence on visitor behaviour.

7.3.5 Compared to the other actions mentioned earlier, relatively more local residents gave the response “Unlikely” to the actions of awareness-raising through local forums and closing car parks at sensitive times of the year. However, the majority of local residents believe that both these actions would be useful.

7.3.6 Among visitors, there is very strong support for three particular actions which they believe is “Likely” or “Very likely” to influence behaviour in a positive way. Overall, all but a small minority of visitors believe that getting park rangers to talk to visitors, putting information on websites and social networks, and keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas, are either “Likely” or “Very likely” to influence behaviour in a positive way.

Table 41: Resident views on actions to influence behaviour

Base = 2208	Very unlikely	Unlikely	Likely	Very likely
The imposing of lower speed limits in vulnerable areas	1%	24%	54%	20%
Putting up signs signalling what visitors should or shouldn't do	2%	22%	60%	16%
Getting South Downs rangers to talk to visitors	1%	9%	59%	32%
Producing printed information such as books and leaflets	1%	18%	63%	18%
Putting information on websites and social networks	0%	9%	57%	34%
Awareness raising through guided walks	0%	11%	62%	26%
Awareness raising through local forums	2%	36%	53%	9%
Keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas	0%	2%	32%	66%
Closing car parks at times of the year when animal or plant species are vulnerable	2%	32%	47%	19%

Note: Results exclude the small number of people who gave 'don't know/neither agree or disagree.

Table 42: Views on actions to influence behaviour

Base = 6815	Very unlikely	Unlikely	Likely	Very likely
The imposing of lower speed limits in vulnerable areas	2%	22%	57%	20%
Putting up signs signalling what visitors should or shouldn't do	1%	18%	66%	15%
Getting South Downs rangers to talk to visitors	0%	6%	61%	33%
Producing printed information such as books and leaflets	1%	16%	59%	24%
Putting information on websites and social networks	0%	8%	51%	41%
Awareness raising through guided walks	0%	10%	68%	21%
Awareness raising through local forums	5%	43%	46%	7%
Keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas	0%	1%	28%	70%
Closing car parks at times of the year when animal or plant species are vulnerable	5%	31%	47%	17%

Note: Results exclude the small number of people who gave 'don't know/neither agree or disagree.

7.4 Resident and visitor support for visitor pay back scheme

7.4.1 Resident and visitor views on the introduction of a Visitor Payback Scheme were sought. The scheme was briefly explained as a method designed to encourage visitors to make a voluntary contribution towards local environmental improvements, by donating a small amount of money e.g. this may be added to the cost of services such as food & beverages purchased in local shops or through a collection box. Support for the scheme was based on a rating scale of 'Very unlikely' to support to 'Very likely' to support.

7.4.2 Just over half of all local residents are likely to support a Visitor Payback Scheme (47% likely and 12% very likely). Follow through into recommendations

7.4.3 Just under a fifth (18%) reported not to be sure whether they would support it or not and the remaining 23% of local residents reported that their support was either unlikely (17%) or very unlikely (6%).

Table 43: Likelihood of supporting a Visitor Payback Scheme among residents

Base	2208
Very unlikely	6%
Unlikely	17%
Neutral/not sure	18%
Likely	47%
Very likely	12%

7.4.4 Overall 62% of visitors would support a visitor pay back scheme. Around half of all visitors (49%) reported that they are likely to support the scheme and 13% reported that they are very likely to support the scheme.

Table 44: Likelihood of supporting a Visitor Payback Scheme among visitors

Base	6815
Very unlikely	4%
Unlikely	18%
Likely	49%
Very likely	13%
Neutral/not sure	16%

7.5 Visitor issues impacting on land managers

7.5.1 Feedback from land managers who were consulted as part of the Environment Survey indicated that three-quarters (72%) experienced a number of negative visitor impacts. The majority of these reported issues relating to walking and dogs.

7.5.2 Key findings are as follows:

- Over half (59%) of the issues relate to walking with/without dogs, of which 22% of issues were specifically related to dogs
- The main issue cited in relation to walking was people walking anywhere and off public rights of way with consequential damage to wildlife and disturbance of stock
- The main issue cited in relation to walking with dogs was dogs not being on leads and out of control with resultant disturbance to wildlife and stock.
- Cycling accounted for 12% of the issues with concerns relating to cyclists misusing footpaths and causing disturbance;
- Use of motor bikes, quad bikes and 4x4s accounted for 11% of issues with the main concern being inappropriate use of the countryside and rights of way
- Riding away from designated bridleways was the main concern associated with horse riding which accounted for just 8% of the issues.
- Damage to gates and fences and litter

7.5.3 The main issues around dogs were:

- Lack of control by owners (including professional dog walkers)
- Stock worrying (cattle, sheep, horses)
- Chasing wildlife, disturbing ground nesting birds
- Dog faeces not cleared up, plastic bags left on fences
- Dog faeces carrying Neospora

7.5.4 Most land managers felt that visitor management in the South Downs could be improved and some of the visitor impacts reduced through better signage of public rights of way and improved education about the meaning of public access with both visitors that travel away from home and those that live locally.

7.6 Visitor issues impacting on nature conservation and cultural heritage sites

7.6.1 Feedback from managers of conservation and cultural heritage sites indicated that around half experience problems with litter and dog fouling. Over a third (37%) mentioned problems caused by trampling on delicate areas of land, and a fifth mentioned soil erosion, with loss of wildlife habitats or species mentioned by managers at 16% of sites. These negative impacts were reported most frequently on chalk downland and in woodland and were primarily caused by walking with and without dogs and cycling on and off trails.

7.6.2 Most of the negative impacts (mentioned by 72% of sites) caused by visitors were thought to be reversible, with erosion of archaeological features/Scheduled Monuments being the main impact that was considered permanent. General wear and tear and tidying up after visitors was the most frequent cost incurred by sites, together with signage and interpretation and repairs to gates, fences and access roads. Relatively little was spent on the restoration of habitats and heritage features. Currently only 20% of sites produced interpretation materials that explained the impact of visitors have on the environment.

7.6.3 The positive impacts of visitors are mostly socio-economic; including education, health, income, employment. Environmental benefits arose from involving the public with volunteering, and increasing their knowledge and awareness, which supported conservation objectives. These positive outcomes were achieved where visitor activities were managed through guided walks or wildlife and photography.

8 VOLUME & VALUE

8.1 Introduction

8.1.1 In order to provide a basis for identifying the economic impact of visitors to the South Downs, it is necessary to generate an estimate of the volume of 'visitor days' spent within the park and the associated expenditure. The total number of 'visitor day' is the annual number of days spent visiting the South Downs by overnight visitors and those on day trips[26].

8.1.2 In generating the estimate, the process has been divided into three stages, namely:

- An estimate of the volume of visitor days by visitors staying in the South Downs, based on the capacity and use of accommodation in the area;
- An estimate of day visits to the South Downs from holiday accommodation outside the area, based on the relationship between visitors staying in the South Downs and those staying outside as determined by the visitor survey;
- An estimate of day visits from home both by those living in the South Downs and those from adjoining areas and further afield, based on the results of the visitor survey and resident survey.

8.2 Estimating visitor volumes

8.2.1 In order to estimate the number of visitors staying overnight within the South Downs National Park, results from the business audit, accommodation occupancy survey and on-site visitor survey are bought together and fed into a process of estimation.

Estimates of overnight visitors

8.2.2 The number of visitors staying in the South Downs will be determined by the capacity of the accommodation available and the occupancy levels achieved. In order to identify capacity, an audit of all commercial accommodation available within the South Downs was carried out. In total, 386 accommodation businesses located in the South Downs were identified, providing accommodation capacity of around 8,888 bedspaces.

8.2.3 Serviced accommodation (hotels and guest houses) accounts for 3,275 bedspaces and non-serviced accommodation accounts for 5,613 bedspaces (of which 552 are self-catering bedspaces, 216 are youth hostel bedspaces, and 4,845 are camping and caravanning park bedspaces) in the South Downs.

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[26] *Visitor Days are calculated by adding the number of nights spent in the South Downs by overnight visitors (staying in the South Downs) to the number of day visitors from home and day visitors on excursions whilst staying overnight outside the South Downs.*

Table 45: Total accommodation stock in the South Downs

	No. of businesses	Rooms/Units	Beds
Guest accommodation	222	708	1,415
Hotels	31	914	1,860
All serviced	*253*	*1,622*	*3,275*
Caravan and camping	28	1062	4,845
Self-catering	100	248	552
Youth hostels	5	72	216
All non-serviced	*133*	*1,382*	*5,613*
Total accommodation	**386**	**3,004**	**8,888**

8.2.4 Assuming that all 3,275 serviced accommodation bedspaces are available through a full year, this provides a total of 1,195,375 bed nights to accommodate guests. The occupancy survey we carried out among a sample of serviced accommodation providers established that the bed occupancy level over the 12 month study period averaged at around 49%. Assuming that 49% of the total beds available was occupied throughout the year, we calculate that **585,734** 'visitor days' were spent by visitors staying overnight in serviced accommodation in the South Downs (see Table 46 overleaf).

8.2.5 The self catering occupancy survey we carried out indicated a relatively high level of occupancy in the South Downs during the year, with bedspace being occupied for an average of 63% of the year. However, the occupancy figure is based on results from only 4 businesses and thus do not provide a reliable measure of performance. We believe a better measure can be obtained from the occupancy data gathered by TSE Research from destinations across the South East[27]. Our surveys indicate that typical self-catering average bed occupancy rates in many rural destinations in the South East range from 45% to 65%. We are confident that by applying the mean average of this range, which provides us with bed occupancy rate of 60%, we can obtain a good 'proxy' measure of occupancy within the self-catering sector in the South Downs.

8.2.6 On the basis of this level of occupancy, and on the basis that all bedspaces are available throughout the year (280,320 bedspaces available), it can be assumed that **168,192** 'visitor days' spent in the South Downs involved staying overnight in self-catering accommodation[28] (see Table 46 overleaf).

8.2.7 The main tourism season for the camping and caravanning sector runs from March to October, with most sites closing over the winter period. An eight month tourism season would provide a total of 1,201,560 bednights to accommodate visitors (based on a total of 4,845 bedspaces multiplied by 248 days). Based on feedback from several camping and caravanning sites, we have estimated an average bed occupancy rate of 45% (see Chapter 3 on business performance) for camping and caravanning sites in the South

[27] *Local occupancy surveys across destinations in the South East is carried out annually to gather data which feed into our Cambridge Economic Impact studies. Annual economic impact studies are carried out for several Local Authority tourism departments in Hampshire, East and West Sussex.*

[28] *We have included overnight stays in youth hostel accommodation in this figure. This has involved adding the total number of self-catering bedspaces with the total number of youth hostel bedspaces for the year. Separate occupancy figures for youth hostels were not available, but anecdotal evidence suggests occupancy levels of around 60% to 65% per year.*

Downs. Assuming that 45% of the total beds available was occupied throughout the tourism season, we calculate that **540,702** 'visitor days' were spent by visitors staying overnight in camping and caravanning accommodation in the South Downs.

8.2.8 Our calculation, based on the data available, indicate that just under 1.3 million visitor days were spent staying in paid for accommodation.

Table 46: Estimated overnight visitor volume

	Serviced	Self-cat. & hostels	Camping & caravan	Total
Total bedspaces	3,275	768	4,845	8,888
Total days available	365	365	248	
Total annual bednights [1]	1,195,375	280,320	1,201,560	2,677,255
Avg. bed occupancy [2]	49%	60%	45%	
Total visitor days	**585,734**	**168,192**	**540,702**	**1,294,628**

Note: [1] *Number of 'beds' available to sleep guests; one bed equates to one potential guest.*
[2] *% of beds which are actually occupied out of the total available.*

8.2.9 In addition to the commercial accommodation, a proportion of overnight visitors will stay with friends and relatives living in the South Downs. The Visitor Survey provides the key information to get a measure of the volume of visitor days generated by those staying in the homes of South Down residents. The Visitor Survey revealed that 65% of all visitors staying overnight in the South Downs stayed in commercial accommodation and 35% stayed in the home of a friend or relative. Based on this data it can be assumed that the estimated 1,294,628 visitor days spent in the South Downs in commercial accommodation represents 65% of all visitor days generated by overnight visitors. Therefore, a further 697,107 visitor days represents the 35% generated by overnight visitors who stayed in the home of a South Down resident.

8.2.10 The estimated number of 'visitor days' spent in the South Downs National Park by visitors staying overnight in the South Downs is shown by accommodation type in Table 47. It is estimated that around **1,991,735** visitor days were generated by visitors staying overnight in the South Downs.

Table 47: Total estimated overnight visitor volume by accommodation type

Estimates of overnight trips	
	Number of' visitor days' spent by overnight visitors
Serviced accommodation	585,734
Self catering & hostels	168,192
Camping & caravanning	540,702
Staying with friends/relatives [1]	697,107
Total nights	**1,991,735**

Note: [1] *includes a small proportion of visiting staying in other type of accommodation such as second homes*

Estimates of day visitors from accommodation elsewhere

8.2.11 There is a considerable concentration of holiday accommodation in the surrounding urban areas around the South Downs, particularly along the coast on the south side of the Park. Holidaymakers staying in this accommodation will make trips away from the accommodation base, with a considerable number venturing into the South Downs area.

8.2.12 The proportion of day visits from holiday accommodation outside the South Downs (day visitors from accommodation elsewhere) recorded in the Visitor Survey was 17% compared to only 5% of visitors staying in the area, so that the former amount to 3.4 times the volume of the latter. On this basis, the number of visitor days spent in the South Downs by visitors from holiday accommodation outside the South Downs amounts to **6,771,899** visitor days.

Estimates of day visitors from home (outside South Downs)

8.2.13 The Visitor Survey recorded 78% of the respondents to the survey as being day visitors travelling from home and returning to their home on the same day (of which 6% were found to be local residents) compared to 5% visitors staying in the South Downs. Thus the former outnumbered the latter by 15.6 times. On this basis the volume of day visitors from home amounts to around **31,071,066** visitor days.

Estimates of local resident visitors

8.2.14 Estimates of day visits from home can be made using data from the visitor survey. However, the visitor survey is likely to undercount local residents, in that many of the visits may be made out of working hours when there was reduced survey activity, and they are likely to make use of a wider range of sites, including sites not included in the visitor survey. Overall, only 6% of all leisure visits to the South Downs was represented by local residents living in the South Downs according to the Visitor Survey.

8.2.15 Whilst this proportion appears relatively representative when measured against the larger population stock of the neighbouring towns and cities, we know from the Resident Survey, that local visitors are frequent visitors to the South Downs and thus their overall volume in terms of visitor days is likely to be greater.

8.2.16 Our estimate draws on results from the Resident Survey, specifically the results on average frequency of visits (see Table 15, page 24). In calculating the average frequency, it is assumed that respondents will over estimate their trips in that they will not take into account time they spend away from the area, or are unable to undertake their normal activity because of illness or other causes. Thus in using the responses we have assumed the following levels of use:

- Every day assumes 301 visits per year
- Several times a week assumes 130 visits per year
- About once a week assumes 41 visits per year
- At least once a month assumes 10 visits per year
- At least twice a month assumes 20 visits per year
- Once over the season assumes 4 visits per year

8.2.17 Using these assumptions and excluding those households who make no visits during the year, the average number of visits by resident households is estimated at 63 per year, which translates to around **6,473,470** visitor days per year.

Table 48: Estimated volume of local residents visitor days

	%	Resident's visiting South Downns [1]	Visits per year	Total resident visitor days
Every day	9%	9,240	301	2,781,384
Several times a week	16%	16,428	130	2,135,578
About once a week	24%	24,641	41	1,010,292
About once a month	22%	22,588	10	225,878
About twice a month	13%	13,347	20	266,947
Once over this season	13%	13,347	4	53,389
Can't recall - varies [2]	4%			
Total		99,592		**6,473,470**
			Average number of visits per year	*63*

Note: [1] *This excludes non-visitors (represents 7% of the population) and the 4% who could not recall frequency of visits*
[2] *No trip volume is provided for those who responded that they could not recall how often they visit or could not quantify it.*

Summary of total visitor volume

8.2.18 The total number of visitor days spent in the South Downs amounts to **46,308,000** (rounded), made up of:

- **1,992,000** visitor days spent by overnight visitor in the South Downs (representing 4% of total volume);
- **6,772,000** day trips into the South Downs from holiday accommodation outside the boundary (representing 14% of total volume);
- **31,071,000** day trips into the South Downs from homes outside the area (representing 66% of total volume);
- **6,473,000** leisure visits made by local residents (representing 16% of total volume).

8.2.19 This represents a 18.2% increase in visitor days compared to the volume in 2003/4, or an annual year-on-year increase of 2.3% over the 8 years from 2003/4 to 2011/12.

Table 49: Total visitor days spent in the South Downs

	2011/12	2003/4
Total overnight visitors inside South Downs	1,992,000	1,357,000
Total day from accommodation outside South Downs	6,772,000	6,771,000
Total day from home outside South Downs	31,071,000	26,705,000
Total day from home inside South Downs	6,473,000	4,340,000
Total visits	**46,308,000**	**39,173,000**
% change overall of:		18.2%
Annual year-on-year increase since 2003/4 of:		2.3%

Note: Figures have been rounded

8.3 Tourism economic impacts

Total visitor expenditure

8.3.1 The average spend per visitor varies, with those on holiday staying in the area spending the most per day while day visitors from home spend least. Drawing on results from the Visitor Survey, we have calculated the average 'visitor day' expenditure for the four visitor categories we have used for the volume and value evaluation. These are:

	Avg. Spend per visitor day
Overnight visitors staying in the South Downs	£38.87
Day visitors visiting from accommodation bases outside the South Downs	£14.93
Day visitors visiting from homes outside the South Downs	£9.20
Day visitors visiting from homes inside the South Downs	£5.50

Table 50: Total estimated direct visitor expenditure

	Total visitor days	Avg. spend	Total visitor spend
Total overnight visitors	1,992,000	£38.87	£77,429,000
Total day from accommodation	6,772,000	£14.93	£101,106,000
Total day from home outside SDs	31,071,000	£9.20	£285,853,000
Total day from home inside SDs	6,473,000	£5.50	£35,601,000
Total visits and spend	**46,308,000**		**£499,990,000**

Note: Figures have been rounded

8.3.2 With the inclusion of local resident expenditure, it is estimated that visits to the South Downs National Park in 2011/12 generated an estimated **£499,990,000** for local businesses, ranging from accommodation providers, attractions, shops, pubs, restaurants, cafes to taxi's and petrol filling stations.

8.3.3 The 2003/4 study discounted expenditure incurred by local residents because such expenditure is not external money to the local economy. If there was no national park in the area, local residents would spend the same amount spent on countryside recreation on some other good or service bought from the local economy.

8.3.4 To provide a direct comparison with the total visitor expenditure reported in 2003/4 we need to remove the expenditure figure for local residents. With local resident expenditure discounted, the total visitor expenditure associated with visits to the South Downs is **£464,388,000**. This represents a growth in visitor expenditure of 39.4% since the last study (representing an annual year-on-year increase of 4.9% over the 8 years from 2003/4 to 2011/12). Total visitor expenditure amounted to £333,091,000 in 2003/4 (see Table 51 overleaf).

8.3.5 However, the percentage increase reported is an increase in nominal terms only. Since 2003/4 the prices of goods and services has increased, with inflation between 2004 and 2011 averaging at around 3.3% per year. This means that £333,091,000 is roughly worth

£419,608,000 in today's money[29]. Accounting for inflation means that the actual increase in the value of visitor expenditure (£464,388,000) since 2003/4 is smaller; an overall increase of 10.7%.

Table 51: Visitor expenditure compared to last study

Visitor spend 2011/12 v 2003/4	
Total visitor spend 2011/12	£464,388,000
Total visitor spend 2003/2004	£333,091,000
% change overall of:	39.4%
Annual year-on-year increase since 2003/4 of:	4.9%
% change overall adjusted for inflation:	10.7%

Jobs supported by visitor expenditure

8.3.6 Having identified the total value of visitor spending, it is possible to estimate the employment associated with that spending. We can do this by calculating that proportion of the expenditure received by businesses which is absorbed by wages for staff. The proportion will vary by business sector; generally wages are likely to be a smaller proportion of costs in retailing compared to accommodation or catering.

8.3.7 We draw on the standard ratios used in the Cambridge Tourism Impact Model to ascribe an average proportion of turnover taken by wage costs for tourism-related employment. Based on a series of previous studies[30], it is assumed that approximately 40% of total turnover will be taken by wage costs. This means that of the total £464,388,000 received by businesses, approximately £185,755,000 will be absorbed by wages for staff. With an average full-time salary of £26,628 for tourism-related employment[31], this turnover supports **6,976** full-time equivalent (FTE) jobs.

8.3.8 However, the total number of actual jobs will be higher when part-time and seasonal working is taken into account. In other words, one FTE job may represent two part-time jobs. Once again, we draw on standard ratios used in the Cambridge Tourism Impact Model to convert FTE jobs to actual jobs. Based on the model is it estimated that one FTE job represents 1.7 actual jobs. Thus, the total number of jobs supported including seasonal and part time jobs is estimated at **11,706** (see Table 52 overleaf).

8.3.9 Not all these jobs will be filled by residents living within the South Downs. Based on earlier research carried out by Geoff Broom & Associates[32], it is estimated that

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[29] *The Bank of England compiles and publishes a range of monetary and financial statistics. These include annual inflation and price converter calculators. The online calculator can be found on: http://www.bankofengland.co.uk/statistics/*
[30] *Standard ratio's used in the Cambridge Model are based on a number of previous business surveys carried out across England including rural business surveys for separate research carried out for the Surrey Hills AONB and the New Forest National Park.*
[31] *The average salary figure is derived from the 2011 Survey of Hours and Earnings.*
[32] *In order to gain a better understanding of the process and the factors affecting the pattern of retention and leakage associated with visitor spending in the countryside, the Countryside Agency commissioned an initial scoping study in 2004. Carried out by Geoff Broom & Associates, the study involved extensive business surveys among rural businesses to identify the breakdown of business turnover, and establish the proportion of turnover re-spent in the local area on local salaries and suppliers and the proportion which 'leaked' out.*

approximately 30% of local jobs are filled by employees who reside outside the South Downs National Park.

8.3.10 Excluding employees living outside the South Downs, it is estimated that visitor expenditure supports approximately 4,883 full-time equivalent jobs and 8,194 actual jobs, an increase of 13.5% compared to 2003/4.

Table 52: Total employment supported by visitor expenditure

	FTE jobs	Actual jobs
Total direct jobs supported by visitor expenditure of which:	6,976	11,706
30% supported outside South Downs	30%	30%
Jobs supported outside South Downs	2,093	3,512
Jobs supported inside South Downs	**4,883**	**8,194**
Jobs supported inside South Downs in 2003/4	4,137	7,218
% change compared to 2003/4	18.0%	13.5%

9 CONCLUSION & RECOMMENDATIONS

9.1 Importance of tourism to South Downs economy

9.1.1 The majority of those visiting the South Downs are attracted by the qualities it has to offer – the opportunity to get fresh air and enjoy the great views, to 'slow down' from the hectic pace of modern living, to spend quality time with friends and family, as well as to enjoy the space on one's own.

9.1.2 Whilst drawn to the above, most people visit to carry out recreational and leisure pursuits. The most common activity is walking followed by visiting an attraction. Other significant activities include visiting tea rooms, restaurants, and pubs.

9.1.3 Based on the data gathered by this study, it is estimated that just over 46 million visitor days were spent in the South Downs in 2011/12, of which around 6.4 million were more informal leisure visits made by local residents.

9.1.4 The net economic benefit comes from visitors travelling from outside the South Downs. Visitors will spend money in village shops, local attractions, tea-rooms, pubs and restaurants and in market towns. A proportion of those staying overnight will do so in hotels or inns, bed & breakfast establishments, self-catering accommodation, or on caravan parks or campsites, thus generating income for the accommodation sector. Based on the data gathered by this study it is estimated that around £464.4 million was spent by visitors (excluding residents) during their visit to the South Downs in 2011/12, supporting approximately 8,194 local jobs.

9.1.5 This places the South Downs as the national park generating the third largest visitor expenditure output (see Table 55 overleaf) after the Lake District (£952m) and the Pembrokeshire Coast (£498m). The actual volume of visits to both the Lake District and the Pembrokeshire Coast is significantly lower than the South Downs. However, both these national parks attract mostly visitors who stay overnight for one or more days. In fact the expenditure figures presented in Table 53 suggest that most other National Parks must attract a relatively large volume of overnight visitors. In general, staying visitor expenditure is much higher per head than day visitor expenditure. With the South Downs being surrounded by a large urban population, it is a key destination for day visitors whose spending will be lower than staying visitors.

9.1.6 Based in the South Downs are 386 commercial accommodation businesses, over a hundred visitor attractions/places of interest, along with over 400 other businesses from golf courses, cafes/tea-rooms to petrol stations which provide important services to visitors and in turn benefit from their custom. This study found that businesses see the South Downs National Park as having a key role in helping them harness the economic benefits generated by visits to the South Downs. The two top priorities for businesses are the marketing/promotion of the South Downs and the provision of visitor information.

Table 53: Comparative visitor volume and value figures across the National Parks

National Park name	Area (sq kilometres)	Population	Trips a year [1] (million)	Visitor days a year (million)	Visitor spend a year (£million)
Brecon Beacons	1344	32,000	4.1	5.1	£220
Broads	305	5,721	7.2	11.3	£419
Cairngorms	4,528	17,000	1.5	0.1	£185
Dartmoor	953	34,000	2.4	3.1	£111
Exmoor	694	10,600	1.4	2.0	£85
Lake District	2,292	42,200	15.8	23.1	£952
Loch Lomond and the Trossachs	1,865	15,600	4	.07	£190
New Forest	570	34,400	12.3	13.5	£123
Northumberland	1,048	2,200	1.5	1.7	£190
North York Moors	1,434	25,000	7	10.7	£411
Peak District	1,437	38,000	8.4	10.4	£356
Pembrokeshire Coast	621	22,800	4.2	13.0	£498
Snowdonia	2,176	25,482	4.27	10.4	£396
South Downs	1,624	110,400	44.7	46.4	£464
Yorkshire Dales	1,769	19,654	9.5	12.6	£400

Note: [1] Trips is the number of visits made, whilst a visitor day is the number of days spent during the trip. For example, an overnight visit of 5 days in the Park counts as 1 trip and 5 visitor days. A day visitor will count as 1 trip and 1 visitor day. For the South Downs, based on the average length of an overnight visit of 5 nights, the 1,992,000 visitor days generated by overnight trips to the South Downs, represent approximately 398,000 overnight trips. This figures added to the other day trip figures, provides a total figure of 44,714,000 actual trips and 464,388,000 visitor days.

Source: Published on http://www.nationalparks.gov.uk/learningabout/whatisanationalpark/factsandfigures.

For many of the National Parks, visitor numbers and visitor spend figures have been taken from STEAM reports, mostly from 2009. We are unable to verify whether the STEAM figures are for direct expenditure only, or whether they also include indirect expenditure. Thus we would advice that the comparative figures are treated with a degree of caution. The figures for the New Forest are derived from a volume and value study carried out by TSE Research/Geoff Broom in 2005. The 2011/12 South Downs figures have been added.

9.1.7 Despite the economic importance of visitor expenditure, a sustainable tourism industry cannot be predicated on economic factors alone. A key imperative of the Park Authority is to examine the impact that tourism has on the host community as a whole and the individuals who make up that community. The community, as hosts to visitors travelling from outside the park boundary, is vital in the visitor experience and may affect tourism development by its willingness, or otherwise, to support the tourism industry.

9.1.8 Local resident views of the impacts of tourism was gathered as part of the study and found that overall there was strong support for tourism. The role played by tourism in generating jobs and preserving rural services is widely recognised and just over half of all local residents are likely to support a Visitor Payback Scheme (47% likely and 12% very likely).

9.1.9 There are concerns, however, among a significant proportion of the community, about damage to the landscape caused by visits including disturbance to livestock, erosion of footpaths, dog fouling and litter. Relatively simple actions like providing more visitor information along footpaths, providing more litter bins and dog bins were perceived to be needed to tackle these problems.

9.1.10 Damage to wildlife and disturbance of stock as a result of visitors walking off public rights of way/footpaths or letting their dogs off their leads, along with dog fouling and litter were also key concerns among land managers and managers of nature conservation and cultural heritage sites in the South Downs. Many felt that visitor management in the South Downs could be improved and some of the negative visitor impacts reduced through better signage of public rights of way and improved education about the meaning of public access with both visitors that travel away from home and those that live locally. Currently only 20% of nature conservation and cultural heritage sites produce interpretation materials which explain the impact of visitors have on the environment, indicating that further support is needed is widening such provision across these sites as well as with many other businesses across the South Downs.

9.1.11 The provision of these and other measures to manage visitor impacts will need support from the National Park Authority. From the perspective of many businesses based in the South Downs, the National Park Authority will play a key role in developing the South Downs as a sustainable tourism destination as well as providing support and information / advice on sustainability for individual businesses.

9.2 Monitoring the future

9.2.1 In order to understand how the South Downs National Park area continues to perform economically, socially and environmentally (as required by the VERB sustainable tourism approach) it will be necessary to maintain an up to date record of key performance indicators and regular data collection will necessary for this.

9.2.2 The frequency of data collection will of course depend on resources available. It is not expected that resources will be available in the near future to cover the breadth and depth of data gathering which took place for this particular research exercise. Instead the recommendation is to channel smaller budgets into core areas of data needs, and when more resources are available to explore other research areas which may be for specific management and/or performance reporting tasks in specific contexts but where there is no advantage in collecting such data on a regular basis.

9.2.3 To get the greatest value for money out of budgets we recommend considering research methods which are significantly cheaper than face-to-face interviews and household surveys. To generate a view of the volume and value of tourism at regular intervals, existing ‘off-the-shelf’ modelling approaches can be utilised. Both the Cambridge Tourism Impact Model and the STEAM Model draw on a relatively limited set of local data including accommodation capacity and structural details of the local tourism economy, coupled with occupancy surveys and results from national tourism surveys, to generate estimates of visitor numbers, revenue and employment.

9.2.4 To obtain data on visitor experiences, information needs, perceptions of the South Downs, reasons for not visiting, and general levels of awareness of the South Downs, online survey panels offer a relatively simple and affordable research method, with the additional benefit of a very fast turnaround from survey delivery to the reporting of results.

9.3 Types of data collected

9.3.1 Data that should be collected fall into two broad categories: **core** and **supplementary**. It is our recommendation that core data should be collected on a regular basis, at least every three to four years, using a nationally consistent, standardised methodology, and should focus on establishing visitor numbers and the economic value of the South Downs visitor economy.

9.3.2 In contrast to core data, supplementary data needs are best dealt with on an ad hoc basis in response to a specific and fairly immediate need that is recognised at the time and/or in relation to a particular management activity. For example, a specific research exercise could focus on visitor information requirements conducted at a time when the South Downs is reviewing its website design and information.

Table 54: Core and secondary visitor data collection

Core data needs	Supplementary data needs
• Aggregate number of visitors and visitor days	• Spatial patterns of use within the South Downs
• Number of staying visitors	• Visitor information requirements (pre-visit and on-site)
• Number of leisure day visitor from holiday accommodation elsewhere	• Visitor experiences (deeper level of understanding)
• Number of leisure day visitors from homes outside South Downs	• Determinants of satisfaction/quality or experience, including:
• Number of leisure visits made by local residents	- Importance of park/services/facilities/attributes
• Average spend per day for each of the categories of visitors described above	- Sources of dissatisfaction
• Number of local jobs supported by visitor expenditure	• Detailed study on reasons for not visiting including identifying barriers/impediments to visiting

10 APPENDICES

10.1 Appendix 1: Copy of Business Attitude Survey Questionnaire

South Downs
National Park Authority

South Downs National Park - Attitudes Survey

NAME OF BUSINESS:

TYPE OF BUSINESS:

- Accommodation
- Attraction
- Activity
- Other

Specify Other:

Type of Accommodation provider

- *Hotel*
- *Guest House/Bed & Breakfast*
- *Inn with accommodation*
- *Self-catering houses/cottages/flats*
- *Caravanning & camping park/site*
- *Youth hostel*
- *Other*

Specify Other type of accommodation:

Type of Visitor Attraction

- *Historic Houses/Castles*
- *Other historic properties*
- *Museums/art galleries*
- *Gardens*
- *Visitor/heritage centres*
- *Wildlife attractions (e.g. farms and zoos)*
- *County Park*
- *Wildlife Nature Reserve*
- *Other*

Specify Other type of attraction:

Type of Activity providers

- *Walking holidays/events*
- *Horse riding*
- *Cycling*
- *Canoeing*
- *Fishing*
- *Paragliding*
- *Other*

Specify Other type of activity:

Are you aware that the area your business/business you manage is located in is within the South Downs National Park?

- *Yes I am aware*
- *No I did not know*

Do you know why the area has been designated a National Park?

- *YES it has special habitat/wildlife which needs protection*
- *YES it has special archaeological interest which needs protection*
- *YES it has special landscape which needs protection*
- *YES it has a unique cultural heritage which needs protection*
- *YES it needs special management to promote sustainable growth*
- *NO/not sure reasons for designation/don't know*
- *Other responses*

Specify Other:

Do you think the fact that the area is a National Park is of benefit to your business?

- *Yes*
- *No*
- *Maybe*

How do you think the National Park Authority can add value in developing the South Downs in a way which will help your business?

Tick all that apply

- *By providing visitor information*
- *Promoting more sustainable tourism*
- *By developing customer focused training to ensure visitors experience a high level of customer care*
- *By working in partnership to market and promote the South Downs as a place to visit and stay*
- *By facilitating partnership working between local businesses to develop the unique offer at particular sites*
- *By developing a strong Brand for the area*
- *Other*

Specify Other:

Are you a:

- *Commercial business*
- *Public funded*
- *Not for profit*

We are interested in exploring people's motivations for starting/running a business in this area. What are your main reasons for having a business in this area? Please write down your reasons briefly in the space below.

What are your future development plans?

- *Grow the business further*

Are your future development plans connected to any of the following

Tick all that apply:

- *Economic downturn*
- *Recession*
- *Reduced trade from fewer customers/customers buying less*
- *Banks not lending as much/not increasing overdrafts*
- *Increased prices/increase VAT*
- *Increase in trade/ more visitors*
- *Recent designation of National Park status of the South Downs*
- *Other*

Specify Other:

How important is sustainability to your business?

By sustainability we mean actively reducing the negative environmental and social impacts of a business's operation. There are many things one can do to promote sustainability such as reduce the amount of waste produced, install efficient lighting and heating, use renewable energy and use local produce.

- *Not very important*
- *Not at all important*
- *Somewhat important*
- *Very important*

What kind of things have you done to make your business more sustainable? Please tick the areas in which you have taken action

Tick all that apply

- *Energy usage, e.g. heating/lighting/vehicle fuel/car sharing/carbon neutral & offsetting*
- *Waste, e.g. the reduction, reuse, and recycling of waste produced by the business*
- *Water - e.g. the reduction and recycling of water produced by the business*
- *Grow, e.g. make own produce/ use locally produced food and drink*
- *Information provision, e.g. provide visitors with information on public transport and local wildlife*
- *Sustainable build - e.g. solar panels or using local building materials*
- *Promotion of other local businesses, e.g. use local suppliers and recommend local cafes, pubs restaurants etc to visitors or other attractions in the local area*

Is your business part of any green accreditation scheme?

- *Yes*
- *No*

If yes, which one?

- *Green Tourism Business Scheme*
- *Green Start*
- *David Bellamy Conservation Awards*
- *Green Mark*
- *ISO 14001 - Environmental Management Standard*
- *Other*

Specify Other:

Why is sustainability not important to your business?

Tick all that apply.

- ☐ *Set-up costs far too high - not affordable for us*
- ☐ *Don't see the point - one business can't make a difference to global warming*
- ☐ *There are no obvious marketing benefits*
- ☐ *Our customers aren't really interested*
- ☐ *We can't see what benefits we would gain as a business*
- ☐ *Application process too long winded / time-consuming*

What benefits have you seen for your business as a result of taking on sustainable practices?

- ☐ *Improved reputation and trust*
- ☐ *Lower costs/better efficiency*
- ☐ *More customers*
- ☐ *Improved staff morale*
- ☐ *None of these*
- ☐ *Others*

Specify Other:

How easy/hard do you find it to be sustainable?

- ◯ *Not very hard*
- ◯ *Not at all hard*
- ◯ *Somewhat hard*
- ◯ *Very hard*

What are the hurdles?

- ☐ *Knowing what sustainability actually is*
- ☐ *High set up costs*
- ☐ *Lengthy bureaucratic processes to access grant funding*
- ☐ *Not enough local government initiatives to help*
- ☐ *Often difficult to directly measure benefits, such as whether led to increased trade*
- ☐ *Application process too time consuming*
- ☐ *Others*

Specify Other:

In your opinion, what role do you think the National Park Authority can play in encouraging more businesses to adopt sustainable business practices?

- ☐ *By providing support and information / advice on sustainability*
- ☐ *By subsiding green accreditation schemes such as Green Tourism Business Scheme*
- ☐ *By taking a lead role in developing the South Downs as a sustainable tourism destination*
- ☐ *By taking a lead role in developing a local sustainable tourism network*
- ☐ *Other*

Specify Other:

THANK YOU FOR TAKING PART IN OUR SURVEY - YOUR PARTICIPATION IS VERY IMPORTANT TO US

10.2 Appendix 2: Copy of Resident Survey Questionnaire

SOUTH DOWNS RESIDENT QUESTIONNAIRE 2011 12

Date: / /12 **Interviewer:.......................................**

Interview location: ....

FILTER QUESTION: HELLO, ARE YOU A RESIDENT OF THIS TOWN/VILLAGE? YES – CONTINUE WITH INTERVIEW NO – END INTERVIEW

I'm .... from Tourism South East (Tourist Board). We are conducting a survey of leisure visits to the South Downs National Park on behalf of the National Park Authority. The results will be used to help the Authority get better insights into how the park is used by local residents. The survey should take less than 10 minutes. Would you be willing to take part?

Q1. First of all I would like to establish whether you have heard of the South Downs National Park?

Yes I have heard	-1 Go to Q2
No I haven't heard/not sure	-2 Go to Q3a

Q2. Do you know why the area has been designated a National Park? *Leave unprompted – circle codes which best match responses. After go to Q3b.*

YES it has special habitat/wildlife which needs protection	-1
YES it has special archaeological interest which needs protection	-2
YES it has special landscape which needs protection	-3
YES it has a unique cultural heritage which needs protection	-4
YES it needs special management to promote sustainable growth	-5
NO/not sure reasons for designation/don't know	-6
Other responses (specify)..	-7

Q3a. Although you have not heard of the South Downs National Park, you may well have visited it. *SHOW MAP.* **Having seen the map do you recall visiting any part of the park in the previous 12 months for a leisure purposes?** *E.g walking/waling the dog, cycling, jogging, visiting country pubs and tea rooms etc. (PROBE).*

Yes -1 Go to Q4a No -2 Go DIRECT to Q10

Q3b. Have you and/or a member of your household (spouse/child) visited the South Downs for a leisure visit in the previous 12 months? *Probe if needed as above*

Yes -1 Go to Q4a No -2 Go DIRECT to Q10

Q4a. Thinking about your visits to the South Downs over the course of a year, how often would you say you visit the South Downs for a leisure-related visit (*this includes day out, short walk, walking the dog*) over each of the four seasons of the year? *Show Card 1. Circle one response for each season*

Spring (Mar/Apr/May)		**Summer (Jun/Jul/Aug)**	
Every day	-1	Every day	-1
Several times a week	-2	Several times a week	-2
About once a week	-3	About once a week	-3
About once a month	-4	About once a month	-4
About twice a month	-5	About twice a month	-5
Once over this season	-6	Once over this season	-6
Visit unlikely	-7	Visit unlikely	-7
Visiting today for first time	-8	Visiting today for first time	-8
Autumn (Sep/Oct/Nov)		**Winter (Dec/Jan/Feb)**	
Every day	-1	Every day	-1
Several times a week	-2	Several times a week	-2
About once a week	-3	About once a week	-3
About once a month	-4	About once a month	-4
About twice a month	-5	About twice a month	-5
Once over this season	-6	Once over this season	-6
Can't recall/Visit unlikely	-7	Can't recall/Visit unlikely	-7
Visiting today for first time	-8	Visiting today for first time	-8

Q4b: Who do you normally visit with?

Alone	-1	With family & friends	-5
With spouse	-2	Members of club/association	-6
Family/Children	-3	Work colleague	-7
Group of friends	-4	Students	-8
Other	-9	....	

Q5: Are there any particular times in the day when you like to visit?

Various times/flexible	-1	Afternoon	-4
Early morning	-2	Early evening	-5
Mid morning to after lunch	-3	Late evening	-6

Q6: Can you remember the location you last visited? If yes, write in name below. *It may help to show map again to prompt.*

Q7. Please can you read through the list of potential impacts visits to the South Downs National Park may be having. In your opinion to what extent do you agree/disagree with the following statements: *Show Card 2. Circle one response*

Strongly disagree -1	*Disagree -2*	*Agree -3*	*Strongly agree - 4*	*Don't know - 5*
Visits to the South Downs creates income and jobs for the local economy through visitor expenditure				

Strongly disagree - 1	*Disagree - 2*	*Agree -3*	*Strongly agree - 4*	*Don't know - 5*
Visits to the South Downs helps preserve rural services like buses, village shops and post offices				

Strongly disagree -1	*Disagree - 2*	*Agree -3*	*Strongly agree -4*	*Don't know - 5*
Visits to the South Downs causes damage to the landscape: dog fouling, litter, erosion, fires, disturbance to livestock, vandalism				

Strongly disagree - 1	*Disagree - 2*	*Agree -3*	*Strongly agree -4*	*Don't know - 5*
Visits to the South Downs causes traffic congestion and pollution				

Q8: Which of the following do you think is likely to influence visitor behaviour so as to protect the wildlife and special landscape of the South Downs (*e.g. encourage visitors to be careful around sensitive sites such as where there are ground nesting birds*)? Please indicate response using the following scale: *Show Card 3. Circle one response*

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
The imposing of lower speed limits in vulnerable areas				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Putting up signs signalling what visitors should or shouldn't do				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Getting park rangers to talk to visitors				
Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Producing printed information such as books and leaflets				
Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Putting information on websites and social networks				
Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Awareness raising through guided walks				
Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Awareness raising through local forums				
Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas				
Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*

Closing car park at times of the year when animals or plant species are vulnerable				

Q9: How likely are you to support a Visitor Payback Scheme? These schemes are designed to encourage visitors to make a voluntary contribution towards local environmental improvements, by donating a small amount of money e.g. this may be added to the cost of services such as food & beverages purchased in local shops or through a collection box).

Very unlikely-1 Unlikely -2 Neutral/not sure -3

Likely -4 Very likely -5

ASK ONLY NON-VISITORS Q10 TO Q13 – otherwise go to Q14

Q10: Have you ever visited any part of the South Downs National Park (further than 12 months ago) for a leisure-related visit? *Show map as prompt.*

Yes -1 Go to Q11 No -2 Go to Q12

Q11: How long ago was your last visit?

Over a year ago	-1	Three years ago	-3
Two years ago	-2	More than 4 years ago	-4

Ask all non-visitors/lapsed visitors (those who visited some time ago) Q12 and Q13

Q12: Why have you never or not recently visited the South Downs National Park? *Show Card 4 and circle which apply.*

Never heard/did not know about it	-1
Prefer to go elsewhere *(probe where)*	-2
Prefer to do other things *(probe where)*	-3
Too far to travel	-4
Not interested in the countryside	-5
No access to a car	-6
Poor public transport	-7
Traffic congestion	-8
Too many people/crowded	-9
Lack of time	-10
Don't know/no particular reason	-11
Other *(specify)*..	-12

Q13: Is there anything that could be PROVIDED or IMPROVED to encourage you to visit the South Downs more frequently? *Open-ended question – write down comment in summary form.*

ASK ALL VISITORS

Finally we have some questions about you.

Q14. What age group do you fall into? *Show Card 5. Enter number by gender of respondent.*

	Age	M	F
A	18-24		
B	25-34		
C	35-44		
D	45-54		
E	55-64		
F	65-74		
G	75+		

Q15. Do you have a long term health issue or disability that limits your daily activity?

Yes -1 No -2

Q16. What is/was the principal occupation of the chief income earner in your household in terms of position/ job title / etc. *Check if retired and circle appropriate response and then take note of previous occupation. We want to know about number of retired visitors.*

....

Q16a. Retired Yes -1 No -2

Q17. How would you describe your ethnic group? *Show Card 6*

White:

British (inc. English, Welsh, Scottish)	-01
Irish	-02
Any other background (e.g. French, Australian, American etc)	-03

Black or Black African:

Caribbean	-04
African	-05
Any other background	-06

Mixed:

White & Black Caribbean	-07
White & Black African	-08
White & Asian	-09
Any other mixed background	-10

Asian or Asian British:

Indian	-11
Pakistani	-12
Bangladeshi	-13
Any other Asian background	-14

Chinese or other ethnic group:

Chinese	-15
Any other ethnic group	-16

Q20. Finally, could I have your name and email address or telephone number? This will be in the strictest of confidence and will only be used for back-checking this questionnaire.

Name of respondent: ______________________

10.3 Appendix 3: Full set of responses for last location visited by county of residence

Name of location last visited	Number	Proportion
Base	2356	100.0%
St Catherine's Hill	328	14.9%
Queen Elizabeth Country Park	184	8.3%
Petersfield	112	5.1%
Harting Down	97	4.4%
Petworth	96	4.3%
Butser Hill	73	3.3%
Lewes	68	3.1%
Midhurst	68	3.1%
Arundel	60	2.7%
Twyford Water Meadows	50	2.3%
Ditchling Beacon	47	2.1%
Old Winchester Hill	38	1.7%
Cowdray Ruins	38	1.7%
Alfriston	30	1.4%
Goodwood Country Park	27	1.2%
South Downs Way	24	1.1%
West Meon	24	1.1%
South Harting	23	1.0%
East Dean	22	1.0%
Beachy Head	22	1.0%
Singleton	22	1.0%
The Trundle	22	1.0%
Devil's Dyke	20	0.9%
Pulborough Brooks	19	0.9%
Amberley	19	0.9%
Uppark House	17	0.8%
Stanmer Park	17	0.8%
Birling Gap	16	0.7%
Chanctonbury Ring	15	0.7%
Itchen Abbas	14	0.6%
Firle Beacon	13	0.6%
East Meon	13	0.6%
Weald & Downland Open Air Museum	12	0.5%
Stansted House and Gardens	12	0.5%
Cissbury Ring	12	0.5%
Liss	12	0.5%
Bury Hill	11	0.5%
Kingley Vale	11	0.5%
Storrington	11	0.5%
Seaford	11	0.5%
Seven Sisters Country Park	11	0.5%
Bignor Hill	10	0.5%
Selborne	10	0.5%
Glynde	9	0.4%
Heyshott Down	9	0.4%
Jack & Jill Windmills	9	0.4%
Ditchling village	8	0.4%
Cocking	8	0.4%
Liphook	8	0.4%

Continued overleaf

Slindon	8	0.4%
Lavant	8	0.4%
Buriton	7	0.3%
Alresford	7	0.3%
Ringmer	7	0.3%
Iping Common	6	0.3%
Duncton Hill	6	0.3%
Fernhurst	6	0.3%
Fulking	6	0.3%
Hassocks	6	0.3%
Cuckmere Haven	6	0.3%
West Dean	6	0.3%
Findon	6	0.3%
Steep	6	0.3%
Black Cap	6	0.3%
Winnal Moors	6	0.3%
Chichester	6	0.3%
Kingston	6	0.3%
Plumpton Green	5	0.2%
Milland Valley	5	0.2%
Blackdown	5	0.2%
Meon Valley	5	0.2%
Wickham	5	0.2%
Upham	5	0.2%
Patcham	5	0.2%
Shoreham	5	0.2%
Hawkley Hangers	4	0.2%
Keymer	4	0.2%
Whiteways	4	0.2%
Durford Wood	4	0.2%
Mount Caburn	4	0.2%
Rodmell	4	0.2%
Alice Holt	4	0.2%
Shawford Down	4	0.2%
Hambledon	4	0.2%
Steyning	4	0.2%
Clanfield	3	0.1%
Hinton Ampner	3	0.1%
Stedham	3	0.1%
Graffham	3	0.1%
Lodsworth	3	0.1%
Chawton	3	0.1%
Denton	3	0.1%
Bepton Down	3	0.1%
Treyford	3	0.1%
Eastbourne	3	0.1%
Spring Head	2	0.1%
West Burton	2	0.1%
Fittleworth	2	0.1%
Beacon Hill	2	0.1%
Saltdean	2	0.1%
Upper Waltham	2	0.1%
Burpham	2	0.1%
Cheesefoot Head	2	0.1%
Houghton	2	0.1%
Stoughton	2	0.1%

Continued overleaf

Lavington	2	0.1%
Colden Common	2	0.1%
Sutton	2	0.1%
Friston	2	0.1%
Rottingdean	2	0.1%
Rackam Hill	2	0.1%
Tilton Hill	2	0.1%
Morestead	2	0.1%
Ebernoe Common	2	0.1%
Five Bridges Lane	2	0.1%
Alton	2	0.1%
Haslemere	2	0.1%
Lamport Bottom	2	0.1%
Sheffield Park	1	0.0%
Grittenham Farm	1	0.0%
Hooksway	1	0.0%
Sturrington Warren	1	0.0%
Hesworth Common	1	0.0%
Nymans Gardens	1	0.0%
Clayton Windmills	1	0.0%
Cowfold	1	0.0%
Peacehaven	1	0.0%
West Moors	1	0.0%
St Giles Hill	1	0.0%
Overton	1	0.0%
Staunton Country Park	1	0.0%
Sheet	1	0.0%
The Burgh	1	0.0%
Rogate	1	0.0%
Offham	1	0.0%
Southover Grange	1	0.0%
West Harting	1	0.0%
Hollingbury Park/Hillfort	1	0.0%
Kithurst Hill	1	0.0%
North Chapel	1	0.0%
Droxford	1	0.0%
North Stoke	1	0.0%
The Hangers	1	0.0%
Lancing Ring	1	0.0%
Newhaven	1	0.0%
Arlington Reservoir	1	0.0%
Horndean	1	0.0%
Bramber Castle	1	0.0%
Parham	1	0.0%
Iron Hill	1	0.0%
West Chillington	1	0.0%
Halstead	1	0.0%
Litlington	1	0.0%
Bo Peep	1	0.0%
West Tisted	1	0.0%
Ashdown Forest	1	0.0%
Woolbeding	1	0.0%
Don't recall/too many to mention	234	3.9%

10.4 Appendix 4: Full list of responses from residents of actions which will encourage visits

		Number of times mentioned
1	Better signage on pathways/more maps	75
2	More dog bins	66
3	Better maintenance of pathways	61
4	Better public transport	51
5	More rubbish bins	43
6	Extra car parking	34
7	More benches	33
8	Better control of dogs/dog fouling/more signs	15
9	Provide toilets	15
10	Empty rubbish bins	11
11	Special tracks for horses and bikes	10
12	Better advertising	9
13	More rangers	9
14	Better maintenance of car parks/mark bays	6
15	More organised coach trips	6
16	More public information about events	6
17	Put walks/maps on internet	6
18	Improved access for disabled/pushchairs	5
19	Maze needs maintenance	5
20	More tea rooms	5
21	Signs on entering and leaving National Park	5
22	Weir clearing	5
23	Guided walks	4
24	Control building	3
25	Free parking	3
26	More picnic areas	3
27	More toilets	3
28	Water tap in car parks for dogs	3
29	Areas to lock bikes	2
30	Fence weir off for safety	2
31	Higher penalties for dog fouling	2
32	Less signage/bureaucracy	2
33	Number to dial for ranger	2
34	Restrictions on where can cycle	2
35	Stiles are awkward for a lot of people/install gates	2
36	Traffic congestion	2
37	Better vehicle access	1
38	Car park permit to cover multiple car parks	1
39	Charges for dog walkers	1
40	Don't fence areas off	1
41	Drop off points for visitors	1
42	Higher penalties for fly tippers	1
43	Improve fencing onto farmland	1
44	Improve toilets	1
45	Increase amount of hedgerows	1
46	Keep livestock under control	1
47	Less commercialism	1
48	Less restriction on activities	1
49	More bike hire locations	1
50	More campsites	1
51	More parking with views	1
52	Signs to say about closing gates	1
53	Stiles need repairing	1
54	Stop pheasant shooting	1

10.5 Appendix 5: Copy of Visitor Survey Questionnaire

SOUTH DOWNS VISITOR QUESTIONNAIRE 2011 12

Date: / /12 **Interviewer:……………………..………**

Interview location: ………………………………………………

Good morning/afternoon. I'm ………… from Tourism South East (Tourist Board). We are conducting a survey of visitors to the South Downs National Park on behalf of the National Park Authority. The results will be used to help the Authority get better insights into visitor impacts and how it can enhance the visitor experience. The survey should take less than 10 minutes. Would you be willing to take part?

Q1.Before we ask about your visit, can I ask you whether you are aware that this area we are in is part of the South Downs National Park?

Yes I am aware -1 *Go to Q2*
No I did not know -2 *Go to Q3*

Q2. Do you know why the area has been designated a National Park? *Get them to state why. Leave unprompted – circle codes which best match responses.*

YES it has special habitat/wildlife which needs protection	-1
YES it has special archaeological interest which needs protection	-2
YES it has special landscape which needs protection	-3
YES it has a unique cultural heritage which needs protection	-4
YES it needs special management to promote sustainable growth	-5
NO/not sure reasons for designation/don't know	-6
Other responses (specify below)	-7
…………………………………………………………………………………	

Q3: Choosing from the following list, what visitor type best matches you (and your group). *Show Card 1. Circle one response only.*

Visiting as part of a holiday	-1 *Go to Q4a*
Visiting whilst seeing friends and relatives	-2 *Go to Q4a*
Visiting from home for leisure day out	-3 *Go to Q5*
Visiting from home for short trip (e.g. walk dog)	-4 *Go to Q5*
Visiting for work purposes	-5 *Go to Q4a*
Visiting for education purposes	-6 *Go to Q4a*
Visiting UK/this area because of the Olympics	-7 *Go to Q4a*
Other visit types (specify)	-8 *Go to Q4a*
…………………………………………………………………………	

Q4a. Are you staying away from home during your visit to the South Downs National Park?

Yes -1 *Go to Q4b* No -2 *Go to Q5*

Q4b. Can you tell me if you are staying within the South Downs National Park or outside? SHOW MAP

Yes – in South Downs National Park	-1
No – elsewhere in Hampshire	-2
No – elsewhere in West Sussex	-3
No – elsewhere in East Sussex	-4
No – elsewhere in Surrey	-5
No – elsewhere in London	-6
No – elsewhere in Kent	-7
No – none of the above/any other area	-8

Q4c. How many nights are you staying away from home on your trip?

☐ *Enter number of nights*

Q5. Which of the following factors have influenced/will influence your decision on places to visit in the South Downs National Park today? Please select only one Main factor but as many 'Other' factors. *Show Card 2.*

Somewhere I can:

	Main	Other
Go for a walk	-1	-1
Take the dog for a walk	-2	-2
Walk or ride the South Downs Way	-3	-3
Meet up with friends/family	-4	-4
Relax and find peace/tranquillity	-5	-5
Get fresh air/enjoy great views	-6	-6
Go to be inspired and generally feel better at end	-7	-7
Get to easily from home/ close to home	-8	-8
Find amenities like public loos/ice cream van	-9	-9
Visit an attraction (i.e. museum/gardens)	-10	-10
Have a picnic	-11	-11
Go on a special shopping trip (*incl. antique hunting, farmer's markets*)	-12	-12
Visit a pub	-13	-13
Visit a tea room / restaurant	-14	-14
Cycle around	-15	-15
Ride my horse/a horse	-16	-16
Observe wildlife/fauna & flora	-17	-17
Go canoeing/other watersports	-18	-18
Go fishing	-19	-19
Go paragliding/hang gliding	-20	-20
Take part in other sports (e.g. jogging, tai chi)	-21	-21
Attend an event	-22	-22
None of the above	-23	-23
Other *Please specify*	-24	-24
………………………………………………………………………………		

Q6a. What was the main mode of transport you used to get to this location today?

Car / van / motorbike	-1	Bicycle	-2
Bus / coach	-3	Train	-4
Coach tour	-5	Walked	-6
Boat	-7	Other	-8

Q6b. What led you to choose this particular mode of transport today? *Show Card 3. Circle all which apply*

Cost	-1
Environmentally friendly	-2
Ease of access	-3
Health benefits	-4
Time / speed	-5
Safety – travelling alone / with children	-6
Convenience	-7
No real alternative	-8
Part of a coach tour	-9
Best suited for these road conditions	-10
Don't own a car / have access to a car	-11
Inadequate public transport services	-12
Not aware of public transport services	-13
Other	-14
………………………………………………………………………………	

Q6c. Would you consider using public transport on your next visit?

Yes -1 *Go to Q7* No -2 *Go to Q6d* Maybe-3 *Go to Q6d*

Q6d. Why would you not choose/not be sure about choosing public transport? *Show Card 4. Circle all which apply*

Cost	-1	Not on route	-6
Ease of access	-2	Not aware of any public transport	-7
Time	-3		
Safety	-4	Weather	-8
Not very convenient	-5	Other reason	-9

Q7. Thinking about your visits to the South Downs over the course of a year, how often would you say you visit the South Downs for a leisure-related visit (*this includes day out, short walk, walking the dog*) over each of the four seasons of the year? *Show Card 5. Circle one response for each season*

Spring (Mar/Apr/May)		**Summer (Jun/Jul/Aug)**	
Every day	-1	Every day	-1
Several times a week	-2	Several times a week	-2
About once a week	-3	About once a week	-3
About once a month	-4	About once a month	-4
About twice a month	-5	About twice a month	-5
Once over this season	-6	Once over this season	-6
Visit unlikely	-7	Visit unlikely	-7
Visiting today for first time	-8	Visiting today for first time	-8
			-9
Autumn (Sep/Oct/Nov)		**Winter (Dec/Jan/Feb)**	
Every day	-1	Every day	-1
Several times a week	-2	Several times a week	-2
About once a week	-3	About once a week	-3
About once a month	-4	About once a month	-4
About twice a month	-5	About twice a month	-5
Once over this season	-6	Once over this season	-6
Can't recall/Visit unlikely	-7	Can't recall/Visit unlikely	-7
Visiting today for first time	-8	Visiting today for first time	-8

Q8: How would you rate the importance of your visits to the South Downs are on your health and sense of well-being on a scale of not very important to very important. *If first time, or only been few times before ask them about the importance of the visit today on their health & well-being. Circle one response*

Not very important	-1
Not important	-2
Important	-3
Very important	-4
Don't know/or neither important/unimportant	-5

Health & well-being can refer to physical fitness, feeling spiritually uplifted, and an improved mental state and so on.

Q9: What sources of information did you use to plan your visit today? *Show Card 6. Circle all which apply*

Did not use any/ Relied on personal knowledge	-1
Radio/TV	-2
Printed press	-3
Websites	-4
Specialist publications	-5
Social media networks	-6
Visitor Information Centre	-7
Signage	-8
Maps	-9
Satellite Navigation / GPS device	-10
Friends/relatives/contacts	-11
Mobile phone app	-12
Other (specify)	-13
……………………………………………………………………………	

Q10. Please can you read through the list of potential impacts visits to the South Downs National Park may be having. In your opinion to what extent do you agree/disagree with the following statements:
Show Card 7. Circle one response

Strongly disagree -1	*Disagree -2*	*Agree -3*	*Strongly agree - 4*	*Don't know - 5*
Visits to the South Downs creates income and jobs for the local economy through visitor expenditure				

Strongly disagree - 1	*Disagree - 2*	*Agree -3*	*Strongly agree - 4*	*Don't know - 5*
Visits to the South Downs helps preserve rural services like buses, village shops and post offices				

Strongly disagree -1	*Disagree - 2*	*Agree -3*	*Strongly agree -4*	*Don't know - 5*
Visits to the South Downs causes damage to the landscape: dog fouling, litter, erosion, fires, disturbance to livestock, vandalism				

Strongly disagree - 1	*Disagree - 2*	*Agree -3*	*Strongly agree -4*	*Don't know - 5*
Visits to the South Downs causes traffic congestion and pollution				

Q11: Which of the following do you think is likely to influence visitor behaviour so as to protect the wildlife and special landscape of the South Downs (e.g. encourage visitors to be careful around sensitive sites such as where there are ground nesting birds)? Please indicate response using the following scale: *Show Card 8. Circle one response*

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
The imposing of lower speed limits in vulnerable areas				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Putting up signs signalling what visitors should or shouldn't do				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Getting park rangers to talk to visitors				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Producing printed information such as books and leaflets				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Putting information on websites and social networks				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Awareness raising through guided walks				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Awareness raising through local forums				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Keeping footpaths/rights of way well-maintained to discourage walking on sensitive areas				

Very unlikely -1	*Unlikely -2*	*Likely -3*	*Very likely - 4*	*Don't know -5*
Closing car park at times of the year when animals or plant species are vulnerable				

Q12: How likely are you to support a Visitor Payback Scheme? These schemes are designed to encourage visitors to make a voluntary contribution towards local environmental improvements, by donating a small amount of money e.g. this may be added to the cost of services such as food & beverages purchased in local shops or through a collection box.

Very unlikely-1 Unlikely -2 Likely -3

Very likely -4 Neutral/not sure -5

WE WANT TO ESTABLISH THE IMPORTANCE OF VISITOR SPENDING IN THE SOUTH DOWNS AND IT WOULD BE MOST HELPFUL IS YOU COULD ASSIST US BY PROVIDING DETAILS OF YOUR SPENDING.

Q13a. Thinking of today as a whole, approximately how much do you expect that you and your immediate party will have spent in the South Downs on the following? *SHOW MAP to identify areas of expenditure. MUST be in the designated area. Enter '0' if spent nothing on the categories below. Leave blank if feel can't provide a figure.*

Attractions (entry fees, gifts etc) £........................
Food & drink £........................
Transport (petrol, parking, travel tickets) £........................
Shopping (souvenirs, gifts etc) £........................
Activity (cycle hire / horse riding etc) £........................

Q13b. How many people do these amounts cover?........

Q13c: If you stayed/are staying overnight in the South Downs, can you let us know what the TOTAL COST of your accommodation is for the entire duration of your trip?

£..

Enter '0' if spent nothing on the categories below. Leave blank if feel can't provide a figure. Get indication whether staying in home of friend/relative

Q13d. How many people do these amounts cover?........

Q14. How would you rate the level of overall enjoyment of your visit to the South Downs National Park today on a level of very good to very poor? *Use 5 point scale below*

Very good -1 Poor -4
Good -2 Very poor -5
Average -3

If reply poor or very poor ask for reasons why

....
....
....
....

FINALLY WE HAVE SOME QUESTIONS ABOUT YOU (AND IF APPLICABLE THE GROUP YOU ARE WITH). THIS INFORMATION IS ONLY USED FOR STATISTICAL PURPOSES.

Q15a. Do you live in the UK?

Yes -1 *Go to Q15b* No -2 *Go to Q16*

Q15b. Which town do you live in?

....

Q15c. What county is that in?

....

Q16. Which country do you live in?

....

Q17: Who are you visiting with today?

Alone	-1	With family & friends	-5
Adult couple	-2	Members of club/association	-6
Family	-3	Work colleague	-7
Group of friends	-4	Students	-8
Other	-9	....	

Q18. Including yourself which of these age groups do the people in your immediate party fall into? *Show Card 9. Enter number against each age by gender for all members*

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

Q19. Do you have a long term health issue or disability that limits your daily activity?

Yes -1 No -2

Q20. What is/was the principal occupation of the chief income earner in your household in terms of position/ job title / etc: *Check if retired and circle appropriate response and then take note of previous occupation. We want to know about number of retired visitors.*

....

Q20a. Retired? Yes -1 No -2

Q21. How would you describe your ethnic group?
Show Card 10.Circle one response

White: British (inc. English, Welsh, Scottish) -01
Irish -02
Any other background -03
(e.g. French, Australian, American etc)
Black or Black African:
Caribbean -04
African -05
Any other background -06
Mixed:
White & Black Caribbean -07
White & Black African -08
White & Asian -09
Any other mixed background -10
Asian or Asian British:
Indian -11
Pakistani -12
Bangladeshi -13
Any other Asian background -14
Chinese or other ethnic group:
Chinese -15
Any other ethnic group -16
Declined -17

Q22. Finally, could I have your name and email address or telephone number? This will be in the strictest of confidence and will only be used for back-checking this questionnaire.

Name of respondent: ______________________

Email / Tel: ______________________

10.6 Appendix 6: Full list of visitor place of residence split by county

	All	Holiday-maker	VFR visitor	Leisure day visitor	Short trip day visitor	Other visit type
Hampshire	29.4%	4.6%	12.4%	36.2%	34.8%	23.0%
West Sussex	20.3%	3.3%	13.0%	22.3%	30.0%	24.9%
East Sussex	17.2%	5.2%	11.3%	18.0%	26.2%	20.6%
Surrey	10.1%	7.2%	7.6%	12.7%	4.4%	10.5%
Greater London	5.2%	12.2%	9.6%	4.0%	1.5%	5.7%
Kent	3.4%	7.4%	5.6%	2.8%	0.8%	5.7%
Essex	1.5%	6.2%	2.3%	0.6%	0.3%	-
Berkshire	1.4%	2.5%	1.7%	1.3%	0.7%	0.5%
Somerset (including Bristol)	0.7%	2.5%	3.7%	0.2%	-	1.0%
Hertfordshire	0.7%	3.3%	1.1%	0.2%	0.1%	-
Dorset	0.6%	1.4%	2.5%	0.4%	0.2%	0.5%
Oxfordshire	0.6%	1.7%	2.3%	0.3%	0.2%	-
West Midlands	0.5%	3.3%	0.8%	-	-	-
Lancashire	0.4%	2.5%	0.8%	-	-	0.5%
Devon	0.4%	1.9%	1.1%	0.1%	-	1.0%
Cheshire	0.4%	2.0%	1.4%	-	-	-
Norfolk	0.4%	2.0%	0.8%	-	0.1%	-
Buckinghamshire	0.4%	1.0%	0.6%	0.2%	-	1.0%
Suffolk	0.4%	1.8%	0.8%	0.1%	-	-
Yorkshire - West	0.3%	1.8%	0.8%	-	0.1%	-
Cambridgeshire	0.3%	1.1%	1.4%	0.1%	0.1%	1.0%
Leicestershire	0.3%	1.9%	0.3%	0.0%	-	-
Nottinghamshire	0.3%	1.7%	1.1%	-	-	-
Wiltshire	0.3%	1.2%	0.3%	0.2%	-	0.5%
Scotland	0.3%	1.4%	1.1%	-	-	1.0%
Gloucestershire	0.3%	1.6%	0.3%	0.0%	0.1%	-
Yorkshire - South	0.3%	1.5%	0.6%	0.0%	0.1%	-
Bedfordshire	0.3%	1.1%	0.8%	0.1%	0.2%	-
Yorkshire - North	0.3%	1.4%	0.6%	0.0%	-	0.5%
Derbyshire	0.3%	0.7%	2.0%	0.0%	-	0.5%
Isle of Wight	0.3%	1.0%	0.6%	0.1%	0.1%	-
Lincolnshire	0.3%	1.4%	0.6%	-	-	0.5%
Wales - South	0.2%	1.1%	0.6%	0.0%	-	1.0%
Warwickshire	0.2%	1.1%	0.3%	0.1%	0.1%	0.5%
Cumbria	0.2%	0.6%	1.4%	0.0%	-	-
Northamptonshire	0.2%	0.9%	0.8%	0.0%	-	-
Shropshire	0.2%	0.6%	1.1%	-	-	-
Staffordshire	0.2%	0.9%	0.6%	-	-	-
Merseyside	0.1%	0.4%	0.8%	0.0%	-	-
Cornwall (and Scilly Isles)	0.1%	0.3%	1.1%	-	-	-
Worcestershire	0.1%	0.5%	0.6%	-	-	-
Durham	0.1%	0.5%	0.3%	-	-	-
Greater Manchester	0.1%	0.5%	0.3%	-	-	-
Tyne & Wear	0.1%	0.4%	0.6%	-	-	-
Northern Ireland	0.1%	0.6%	-	-	-	-
Channel Islands	0.1%	0.3%	0.6%	-	-	-
Northumberland	0.1%	0.2%	0.6%	0.0%	-	-
Yorkshire - East	0.1%	0.4%	0.3%	-	-	-
Cleveland (Tees Valley)	0.0%	0.1%	-	-	0.1%	-
Herefordshire	0.0%	0.2%	-	-	-	-
Isle of Man	0.0%	0.2%	-	-	-	-
Wales - Mid	0.0%	0.1%	0.3%	-	-	-

10.7 Appendix 7: Full list of visitor place of residence split by country

	All	Holiday-maker	VFR visitor	Leisure day visitor	Short trip day visitor	Other visit type
Country live in	325	255	36	9	3	22
Germany	16.9%	18.4%	11.1%	11.1%	-	13.6%
Netherlands	14.2%	16.5%	2.8%	-	-	13.6%
Australia	9.5%	7.8%	25.0%	-	33.3%	4.5%
France	9.2%	8.2%	8.3%	-	-	27.3%
United States	8.0%	7.5%	13.9%	11.1%	-	4.5%
Belgium	5.5%	6.3%	2.8%	-	-	4.5%
Switzerland	3.1%	3.9%	-	-	-	-
Italy	2.8%	3.1%	-	11.1%	-	-
New Zealand	2.2%	2.0%	2.8%	-	-	4.5%
Japan	2.2%	2.0%	-	-	-	9.1%
Republic of Ireland	2.2%	2.4%	2.8%	-	-	-
Sweden	1.8%	2.4%	-	-	-	-
Norway	1.8%	2.0%	-	-	33.3%	-
Canada	1.5%	1.6%	2.8%	-	-	-
Spain	1.5%	1.2%	2.8%	-	-	4.5%
Korea	1.5%	1.6%	-	11.1%	-	-
Austria	1.2%	0.8%	2.8%	11.1%	-	-
Denmark	1.2%	1.2%	2.8%	-	-	-
Portugal	1.2%	0.8%	2.8%	11.1%	-	-
China	1.2%	1.2%	-	11.1%	-	-
South Africa	1.2%	1.2%	2.8%	-	-	-
Brazil	0.9%	0.8%	-	-	-	4.5%
Hong Kong	0.9%	0.8%	2.8%	-	-	-
United Arab Emirates	0.6%	0.4%	-	-	33.3%	-
Czech Republic	0.6%	0.4%	-	-	-	4.5%
Hungary	0.6%	0.4%	2.8%	-	-	-
Mexico	0.6%	0.8%	-	-	-	-
India	0.6%	0.4%	-	11.1%	-	-
Finland	0.3%	0.4%	-	-	-	-
Greece	0.3%	0.4%	-	-	-	-
Turkey	0.3%	-	-	-	-	4.5%
Oman	0.3%	-	2.8%	-	-	-
Poland	0.3%	0.4%	-	-	-	-
Slovakia	0.3%	0.4%	-	-	-	-
Chile	0.3%	0.4%	-	-	-	-
Bermuda	0.3%	0.4%	-	-	-	-
Guyana	0.3%	0.4%	-	-	-	-
Jamaica	0.3%	-	2.8%	-	-	-
Russia	0.3%	0.4%	-	-	-	-
Zimbabwe	0.3%	0.4%	-	-	-	-
Thailand	0.3%	-	2.8%	-	-	-
Kenya	0.3%	0.4%	-	-	-	-
Mozambique	0.3%	0.4%	-	-	-	-
Philippines	0.3%	-	-	11.1%	-	-

10.8 Appendix 8: Full list of responses on reasons for visiting split by visit type

MAIN REASON	All	Holiday-maker	VFR visitor	Leisure day visitor	Short trip day visitor	Other visit type
Go for a walk	29%	22%	23%	31%	35%	15%
Take the dog for a walk	8%	3%	4%	5%	29%	3%
Walk or ride the South Downs Way	3%	8%	2%	2%	1%	3%
Meet up with friends/family	5%	4%	33%	4%	3%	1%
Relax and find peace/tranquillity	3%	5%	3%	3%	3%	1%
Get fresh air/enjoy great views	9%	15%	7%	9%	6%	5%
Go to be inspired and generally feel better at end	0%	1%	1%	0%	0%	0%
Get to easily from home/close to home	1%	0%	1%	1%	1%	1%
Find amenities like public loos/ice cream van	0%	0%	-	0%	0%	3%
Visit an attraction	19%	29%	14%	22%	3%	8%
Have a picnic	2%	1%	2%	3%	1%	1%
Go on a special shopping trip	2%	2%	2%	2%	3%	3%
Visit a pub	1%	0%	2%	1%	1%	1%
Visit a tea room/restaurant	4%	4%	2%	4%	3%	8%
Cycle around	3%	1%	1%	4%	3%	0%
Ride my/a horse	0%	-	-	0%	0%	-
Observe wildlife/fauna & flora	2%	1%	2%	3%	1%	3%
Go canoeing/other watersports	0%	0%	-	0%	-	0%
Go fishing	0%	-	0%	0%	-	-
Go paragliding/hang gliding	0%	0%	-	0%	0%	-
Take part in other sports	1%	0%	1%	1%	2%	1%
Attend an event	3%	1%	2%	3%	2%	7%
None of the above	0%	0%	-	0%	0%	7%
Other	2%	2%	1%	2%	1%	27%

OTHER REASON	All	Holiday-maker	VFR visitor	Leisure day visitor	Short trip day visitor	Other visit type
Go for a walk	28%	29%	33%	31%	18%	26%
Take the dog for a walk	7%	4%	7%	7%	12%	1%
Walk or ride the South Downs Way	6%	4%	4%	6%	6%	8%
Meet up with friends/family	17%	9%	26%	19%	14%	13%
Relax and find peace/tranquillity	35%	32%	25%	38%	33%	23%
Get fresh air/enjoy great views	56%	48%	48%	60%	60%	36%
Go to be inspired and generally feel better at end	26%	21%	20%	30%	22%	19%
Get to easily from home/close to home	20%	3%	7%	26%	26%	9%
Find amenities like public loos/ice cream van	14%	14%	11%	15%	13%	15%
Visit an attraction	10%	9%	10%	11%	6%	7%
Have a picnic	17%	8%	12%	22%	12%	7%
Go on a special shopping trip	4%	4%	3%	4%	3%	3%
Visit a pub	18%	15%	19%	19%	17%	10%
Visit a tea room/restaurant	44%	45%	39%	49%	31%	41%
Cycle around	6%	2%	1%	9%	5%	2%
Ride my/a horse	1%	0%	-	1%	0%	-
Observe wildlife/fauna & flora	24%	19%	18%	27%	20%	14%
Go canoeing/other watersports	0%	1%	-	0%	0%	-
Go fishing	1%	0%	-	1%	1%	1%
Go paragliding/hang gliding	0%	-	-	0%	0%	-
Take part in other sports	1%	0%	1%	2%	2%	-
Attend an event	5%	2%	2%	6%	4%	3%
None of the above	0%	0%	1%	0%	0%	3%
Other	1%	1%	1%	1%	1%	5%

10.9 Appendix 9: Full list of responses on information uses used split by visit type

Sources of information used to plan visit - Visiting as part of a holiday	
Did not use any/relied on personal knowledge	29%
Radio/TV	1%
Printed press	9%
Websites	34%
Specialist publications	16%
Social media networks	3%
Visitor Information Centre	8%
Signage	6%
Maps	25%
Satellite Navigation/GPS device	12%
Friends/relatives/contacts	12%
Mobile phone app	1%
Other	5%

Sources of information used to plan visit - Visiting whilst seeing friends/relatives	
Did not use any/relied on personal knowledge	54%
Radio/TV	1%
Printed press	2%
Websites	16%
Specialist publications	5%
Social media networks	1%
Visitor Information Centre	2%
Signage	3%
Maps	9%
Satellite Navigation/GPS device	5%
Friends/relatives/contacts	32%
Mobile phone app	1%
Other	2%

Sources of information used to plan visit - Visiting from home for a leisure day out	
Did not use any/relied on personal knowledge	74%
Radio/TV	0%
Printed press	2%
Websites	14%
Specialist publications	5%
Social media networks	1%
Visitor Information Centre	2%
Signage	4%
Maps	10%
Satellite Navigation/GPS device	5%
Friends/relatives/contacts	4%
Mobile phone app	0%

Other	1%
Sources of information used to plan visit - Visiting from home for a short trip	
Did not use any/relied on personal knowledge	88%
Radio/TV	0%
Printed press	1%
Websites	5%
Specialist publications	1%
Social media networks	0%
Visitor Information Centre	0%
Signage	2%
Maps	7%
Satellite Navigation/GPS device	2%
Friends/relatives/contacts	2%
Mobile phone app	1%
Other	0%