

South Downs National Park Visitor Travel Survey



Report of Findings

Prepared by:

TSE Research Services

40 Chamberlayne Road

Eastleigh

Hampshire SO50 5JH

TSE
RESEARCH



Images taken from our land website

Table of contents

1	Executive summary.....	- 1 -
1.1	Introduction	- 1 -
1.2	Visitor profile	- 1 -
1.3	Trip features.....	- 1 -
1.4	Travel behaviour	- 2 -
2	Introduction.....	- 2 -
2.1	Survey aims and objectives	- 3 -
2.2	Methodology	- 3 -
2.3	Outline of report	- 4 -
3	Visitor profile	- 5 -
3.1	Trip type	- 5 -
3.2	Gender and age.....	- 6 -
3.3	Group composition.....	- 6 -
4	Trip features	- 8 -
4.1	New vs repeat visitors.....	- 8 -
4.2	Average visitor expenditure	- 8 -
4.3	Overall enjoyment with visit	- 10 -
4.4	Aspects which make the South Downs special	- 11 -
5	Visitor travel behaviour.....	- 12 -
5.1	Main mode of transport used to travel to the South Downs	- 12 -
5.2	Main mode of transport used to travel around the South Downs	- 16 -
5.3	Information on travelling in environmentally friendly ways	- 20 -
5.4	Key factor which would encourage sustainable travel.....	- 21 -
6	Appendix 1: Additional tabulations	- 22 -
7	Appendix 2: Copy of questionnaire	- 30 -

List of figures

Figure 1: Visitor by type of trip.....	- 5 -
Figure 2: Visitor gender distribution.....	- 6 -
Figure 3: Age distribution of visitors	- 6 -
Figure 4: Group composition	- 7 -
Figure 5: Proportion of new and repeat visitors	- 8 -
Figure 6: When last visited among repeat visitor	- 8 -
Figure 7: Level of overall enjoyment	- 10 -
Figure 8: Factors contributing most to enjoyment.....	- 10 -
Figure 9: Aspects which make South Downs special.....	- 11 -
Figure 10: Main and all modes of transport used to travel to South Downs	- 12 -
Figure 11: % of visitors who have changed transport type to travel to South Downs	- 16 -
Figure 12: Main and all forms of transport used to travel around the South Downs.....	- 17 -
Figure 13: % of visitors who have changed transport type to travel around South Downs.	- 20 -
Figure 14: One main factor which would encourage use of transport other than car	- 21 -

List of tables

Table 1: Sample site and distribution	- 3 -
Table 2: Average spend per head per day	- 9 -
Table 3: Main mode of travel to South Downs – comparative data	- 12 -
Table 4: Main mode of transport to get to South Downs by visitor type.....	- 13 -
Table 5: Main factor in decision to use transport mode to get to South Downs.....	- 15 -
Table 6: Main reason for transport used by main mode of transport to South Downs.....	- 16 -
Table 7: Main mode of transport to travel around South Downs by visitor type	- 17 -
Table 8: Main factor in decision to use transport mode to travel around the South Downs	- 19 -

Table 9: Whether seen any information prior and during visit.....	- 20 -
Table 10: Whether seen any information on various channels	- 21 -
Table 11: List of factors contributing to trip enjoyment.....	- 22 -
Table 12: 'Other' factors in decision to use main mode of transport to get to South Downs-	24 -
Table 13: List of reasons why transport to get to South Downs has changed	- 25 -
Table 14: 'Other' factor in the decision to use main mode of transport to get around SDs	- 26 -
Table 15: Reasons for changing transport type to get around South Downs	- 27 -
Table 16: What would make visitors consider forms of transport other than car	- 28 -

1 Executive summary

1.1 Introduction

- 1.1.1 A visitor survey was designed and delivered to provide the evidential baseline to assess recent initiatives to encourage greener forms of travel to and around the South Downs National Park.
- 1.1.2 The survey involved face-to-face interviews with a random sample of just over 1000 visitors across key sites within the National Park between the 4th July and 26th September 2014 using a standard questionnaire developed by Cumbria Tourism.
- 1.1.3 Key findings are presented in sections 1.2 to 1.4.

1.2 Visitor profile

- 1.2.1 The visitor market in the South Downs is predominately a leisure day market; only 8% of all visitors stay overnight in holiday or other types of accommodation within the park boundary. The majority (78%) are visiting from their homes and returning to their homes on the same day. Of these visitors (58%) are day visitors from homes outside the South Downs and a fifth (20%) are local day visitors living in settlements within the South Downs. A further 15% are visiting as part of a day excursion whilst staying overnight in accommodation outside the South Downs.
- 1.2.2 Visiting the South Downs is a social activity carried out with a spouse/partner (32%), with family members (35%), or with friends and other social groups (19%). However, a sizeable minority (15%) visit alone. These group compositions give rise to an average party size of 2.9 people of which 2.2 are adults and 0.6 are children.
- 1.2.3 Just over half (55%) of all visiting parties contain visitors aged between 35 and 59 years of age and a quarter contain children under 16 years of age, reflecting the sizeable family market. However, older children and young adults aged between 16 and 24 years are under-represented as only 10% of all visiting parties include visitors of this age

1.3 Trip features

- 1.3.1 The vast majority of visitors (79%) have visited previously, and among these, just over three quarters (78%) have visited at some point within the past 12 months including 21% who visited very recently within the past week.
- 1.3.2 The average trip expenditure per person among non-local day visitors (day visitors from homes outside the South Downs as well as those visitors staying overnight outside the South Downs but visiting it as part of a day excursion) is £9.01. Local resident expenditure is only slightly higher at an average of £9.37 per person per day
- 1.3.3 Visitors staying overnight in the South Downs spend on average £29.51 per night on accommodation (this average includes those who incurred no expenditure by staying in the home of a friend/relative or in their second home). With this additional expenditure on accommodation, the average expenditure per person among staying visitors is £51.12 per night and £265.82 over the entire duration of the visit.
- 1.3.4 Visitors to the South Downs experience a high level of trip satisfaction - 97% rate overall enjoyment as high' or 'very high'. The beauty of the landscape and the tranquillity visitors find make the South Downs a special and very enjoyable place to visit.

1.4 Travel behaviour

- 1.4.1 There is a significant difference in the main mode of transport used by visitors to *get to* the South Downs and to *travel around* the South Downs. The main and most dominant type of transport to get to the South Downs is the car (81%). Non-car use is generally very low as a mode of transport to reach the South Downs.
- 1.4.2 Once visitors are at the South Downs, travelling around on foot becomes more important. Over two thirds (66%) of all visitors travel around the South Downs on foot as the *main* mode of transport and 73% of all visitors use walking as one of the modes of transport for travelling around. The use of the private motor vehicle is reduced to 31% as one of the modes of transport used for travelling around and to a quarter as the main mode of transport used for travelling around.
- 1.4.3 To travel to the South Downs, the top and most dominant reason for choosing a particular type of transport is 'Convenience' (mentioned by 65% of all visitors and by 74% of car users). For 15% of visitors their choice of transport is driven by their view that there is no suitable alternative. However, given the increase in the proportion of travel on foot, 'Part of the experience' and 'Health benefits' become more important factors behind transport choices for travelling around the South Downs.
- 1.4.4 For the overwhelming majority of visitors, their choice of transport for travelling and around the South Downs has not changed in the past 12 months.
- 1.4.5 Nearly half of all car users (48%) are unwilling to change into using non-car transport as they feel there are no convenient and practical alternatives which would suit their needs, particularly if they needed to bring with them heavy outdoor equipment, young children (involving pram/pushchairs), or their dog(s).
- 1.4.6 The other half, however, would consider changing to more environmentally friendly forms of transport but there are prerequisites: non-car forms of transport need to offer convenience, practicality, reliability, and affordability.

2 Introduction

2.1 Survey aims and objectives

- 2.1.1 This report presents the results of a visitor travel survey carried out across key locations in the South Downs National Park.
- 2.1.2 The survey was designed to provide the evidential baseline to assess recent initiatives to encourage greener forms of travel to and around the South Downs. These initiatives are linked to a LSTF programme involving the South Downs National Park and the New Forest National Park though they form part of a separately funded visitor travel case study led by Cumbria Tourism. The purpose of the latter is to share best practice in developing sustainable visitor travel to optimise economic benefit and carbon reduction.
- 2.1.3 For brevity, we refer to the South Downs National Park as ‘the South Downs’ in this report.

2.2 Methodology

- 2.2.1 Data gathering involved a face-to-face survey with a random sample of just over 1000 visitors at key sites across the South Downs between the 4th July and 26th September 2014 (see Table 1 for distribution of sample) using a standard questionnaire developed by Cumbria Tourism.
- 2.2.2 The interview sites were carefully chosen to reflect ‘honey point’ locations and maximise opportunities to encounter visitors travelling to and around the South Downs using a range of transport modes. Visitors included both local visitors living in settlements within the National Park boundary and visitors travelling from further afield.

Table 1: Sample size and distribution

	Number	Proportion
Queen Elizabeth Country Park	102	10%
Devil's Dyke	100	10%
Seven Sisters Country Park	100	10%
Lewes (town centre/high street)	96	9%
Alice Holt Forest Park	80	8%
Pulborough Brooks	80	8%
Midhurst	76	8%
Ditchling Beacon	75	7%
Beachy Head	74	7%
Alfriston	68	7%
Old Winchester Hill	67	7%
Harting Down	50	5%
Weald & Downland Museum	45	4%
Total	1013	100%

- 2.2.3 The interview schedule was designed to ensure that the survey captured visitors at different times of the day and over different days of the week to ensure that the sample represented a cross-section of visitors. However, it is worth highlighting that the survey took place over a period which is well known to be the peak tourism season and this is reflected in the relatively high proportion of non-local visitors represented in the sample.
- 2.2.4 It is also worth noting that the focus of the research was on outdoor recreational based visits to the South Downs, such as walking, running, cycling, walking the dog etc. It did not include visits

carried out for routine domestic activities such as local residents travelling for the purpose of routine household shopping.

2.3 Outline of report

- 2.3.1** Chapters 3 to 5 present the results of the survey. In Chapter 3 visitor profile in terms of trip type, gender, age and group composition is presented. Chapter 4 looks at results on key features of the visit to the South Downs such as frequency of visits, expenditure and overall satisfaction.
- 2.3.2** In Chapter 5 attention is turned to the findings on visitor's travel behaviour. Modes of transport used to travel to and around the South Downs are reviewed. The results on whether visitors have changed to more environmentally friendly forms of transport over the past 12 months are presented along with a review of factors that would encourage the adoption of non-car travel. The chapter includes selected results from the 2011/12 visitor survey on transport use to provide a baseline from which the current findings can be evaluated.
- 2.3.3** Selected results are also presented by specific sites where the sample is 80 or more in size. Results are presented for type of visitor, visitor expenditure and mode of travel to and around the South Downs. However, it should be noted that as the sample at site level is still small there is a greater margin of error associated with the results. Thus, the findings at site level should be treated with a degree of caution.
- 2.3.4** Where an * appears this indicates a result of less than 1%. When responses add up to more than 100% this is a consequence of rounding, or because it was possible for respondents to give more than one answer to a question.

3 Visitor profile

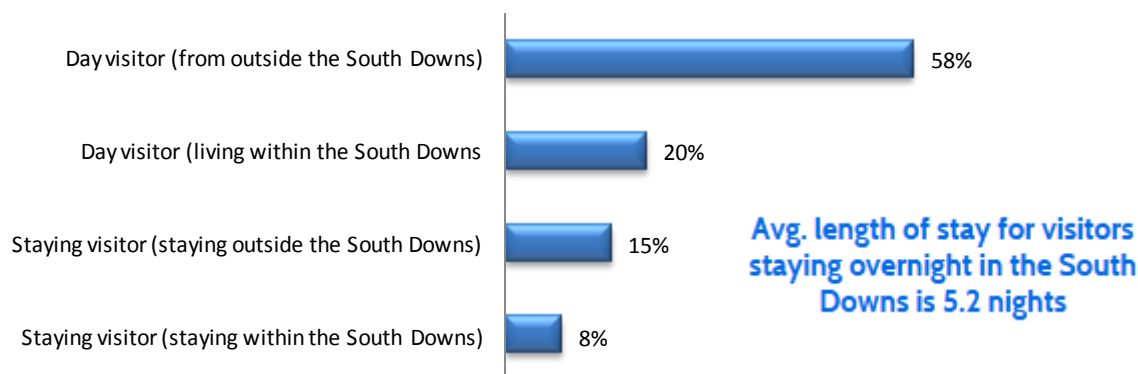
3.1 Trip type

3.1.1 Over half of all visitors (58%) were travelling from homes and returning to homes outside the South Downs on the same day. Two in 10 visitors (20%) were local day visitors travelling from homes located within the South Downs.

3.1.2 Overnight visitors staying in accommodation within the South Downs accounted for 8% of all visitors and a further 15% were also visitors on an overnight trip of one or more nights but these visitors were staying in accommodation outside the South Downs and visiting as part of a day excursion.

3.1.3 Visitors staying overnight in the South Downs spent on average 5.2 nights on their stay.

Figure 1: Visitor by type of trip



3.1.4 The results by selected sites reveal that day visitors from homes outside the South Downs made up the vast majority of visitors at Alice Holt and Queen Elizabeth Country Park (83% and 80% respectively). They were also the main visitor type found at Devil's Dyke (77%).

3.1.5 Local residents accounted for a significant proportion of visitors at Pulborough Brooks (43%) and also Lewes (25%), albeit a smaller proportion. The overnight visitor market was found to be strongest in Lewes (nearly a fifth, 18%) and around a third of all visitors at Seven Sisters Country Park were on day trip excursions whilst staying overnight outside the South Downs (31%).

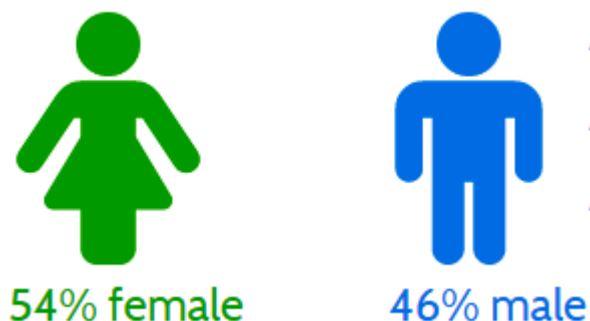
Table 2: Visitor type by sites with sample size of 80 and above

	Alice Holt	QECF	Pulborough Brooks	Devil's Dyke	Lewes	Seven Sisters
Base	80	102	80	100	96	100
Day visitor (living within SDs)	18%	13%	43%	4%	25%	7%
Day visitor (from outside SDs)	83%	80%	51%	77%	43%	53%
Staying visitor (staying within SDs)	0%	2%	1%	6%	18%	9%
Staying visitor (staying outside SDs)	0%	5%	5%	13%	15%	31%

3.2 Gender and age

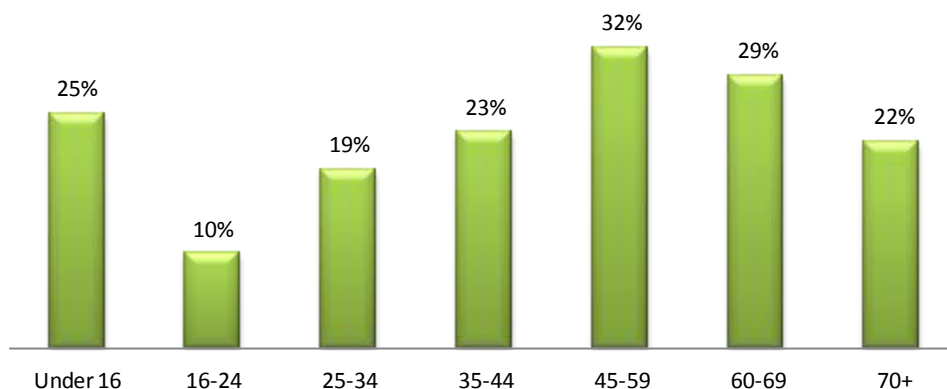
- 3.2.1 A higher proportion of visitors taking part in the survey were female. Over half (54%) of all visitors interviewed were female and 46% were male.

Figure 2: Visitor gender distribution



- 3.2.2 The profile of visitor age (presented in Fig. 3) is based on data gathered for each member of the visiting party if the respondent was visiting with others. As many groups included one or more additional people, several different age groups were represented within a visitor party
- 3.2.3 The results reveal that a quarter of all visiting parties included children under the age of 16 years. The most common age group was 45-59 years with a third of all visiting parties (32%) including visitors in this age group. A relatively low proportion of visiting groups contained people aged 16-24 years (represented within 10% of all visiting parties only).

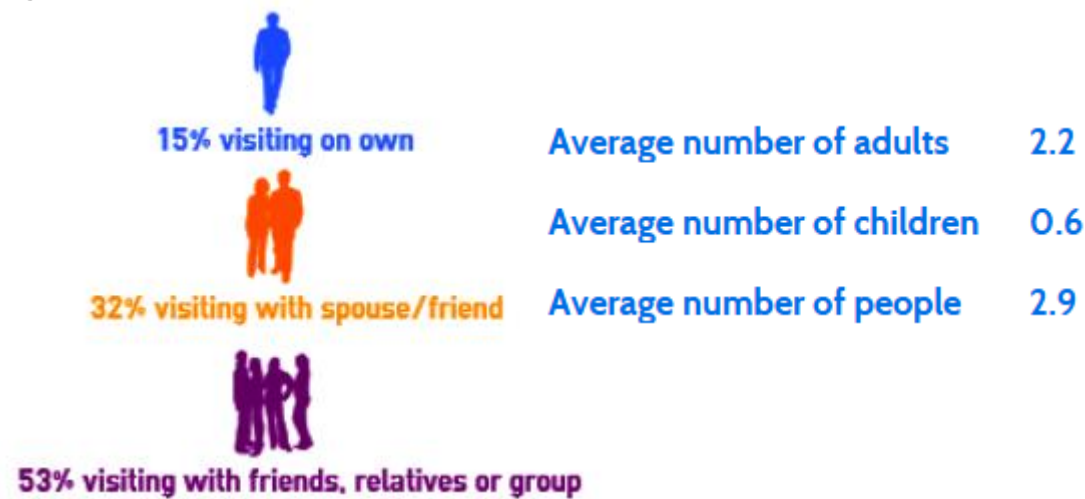
Figure 3: Age distribution of visitors



3.3 Group composition

- 3.3.1 Visits to the South Downs are mostly undertaken with other people. Just over half of all visitors (53%) were found to be visiting with either friends, family members, or as an organised group. Among this half, 35% were visiting with family members, 17% were visiting with friends and only 2% were visiting as part of an organised group.
- 3.3.2 A third of all visitors (32%) were found to be accompanied by their spouse/partner. Those visiting on their own accounted for 15% of all visitors.
- 3.3.3 The average group size was 2.9 people of which 2.2 were adults and 0.6 were children.

Figure 4: Group composition

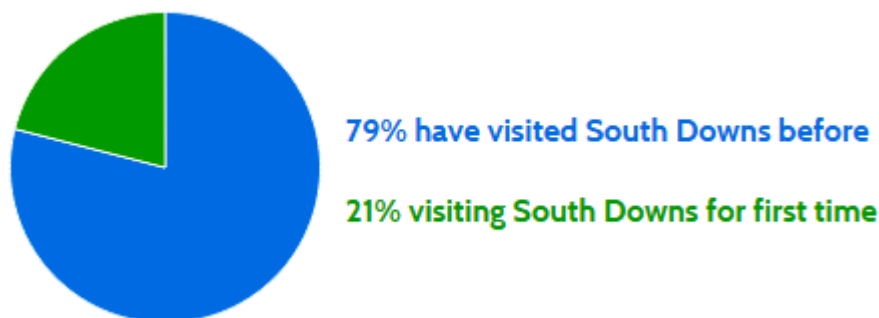


4 Trip features

4.1 New vs. repeat visitors

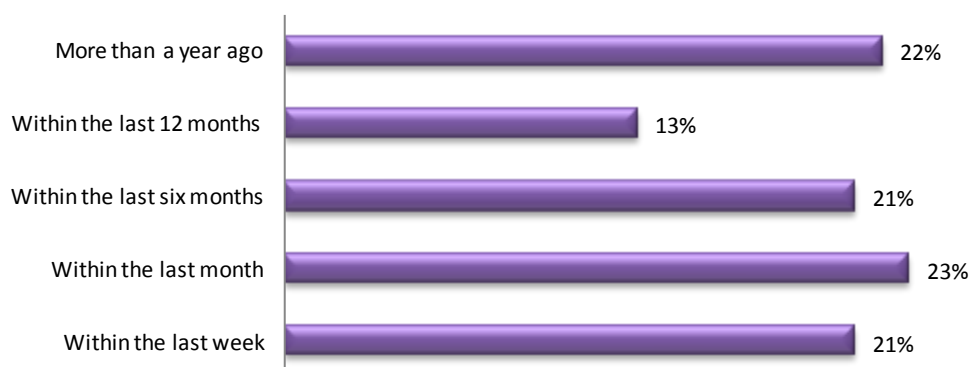
4.1.1 The majority of visitors (79%) have visited the South Downs previously.

Figure 5: Proportion of new and repeat visitors



4.1.2 Among those who have visited previously, a fifth (22%) last visited more than a year ago and 13% had visited within the last 12 months. For others, the last visit was more recent; 21% visited within the last six months, 23% visited within the last month and 21% visited within the last week.

Figure 6: Repeat visitors - when last visited



4.2 Average visitor expenditure

4.2.1 The average trip expenditure per person¹ among non-local day visitors was £9.01. This average includes day visitors travelling to the South Downs from their home and returning to their home on the same day as well as those visitors staying overnight outside the South Downs but visiting it as part of a day excursion.

4.2.2 Local resident expenditure was very similar at an average of £9.37 per person per day.

4.2.3 Visitors staying overnight in the South Downs spent on average £29.51 per night on accommodation (this average includes those who incurred no expenditure by staying in the home of a friend/relative or a second home). With this additional expenditure on accommodation, the average spend per person per night among staying visitors was £51.12. With an average trip length of 5.2 nights, total trip expenditure for staying visitors came to an average of £265.82 per person.

¹ The average figures include visitors who did not incur any expenditure during their visit.

Table 3: Average expenditure per head per day

	Non-local day visitors*	Local day visitor	Staying overnight
Base	734	201	78
Accommodation	-	-	£29.51
Travel / transport	£1.78	£1.56	£4.38
Food and drink	£4.73	£4.57	£11.85
Visitor attractions	£0.53	£0.60	£1.76
Other leisure and recreation	£0.18	£0.12	£0.28
Shopping for daily needs	£0.34	£1.20	£1.34
Other shopping	£1.36	£1.21	£1.74
Any other expenses	£0.09	£0.11	£0.26
Total average	£9.01	£9.37	£51.12

*includes day visitors from home and those visiting as part of day trip excursion whilst staying overnight outside South Downs

4.2.4

Further cross-tabulation of expenditure between overnight visitors who paid for their accommodation and those who did not, reveal that on average the former spent £37.27 more on their visit to the South Downs than the latter. However, it should be noted that the results are based on a small sample of only 78 visiting parties.

Table 4: Average expenditure between visitors staying in paid for and free accommodation

	Paid accommodation	Free accommodation
Base	49	29
Accommodation	£37.66	£0.00
Travel / transport	£4.62	£3.70
Food and drink	£11.82	£12.69
Visitor attractions	£1.12	£1.48
Other leisure and recreation	£0.35	£0.00
Shopping for daily needs	£1.44	£0.95
Other shopping	£1.50	£2.54
Any other expenses	£0.11	£0.00
Total average	£58.62	£21.35

Note: Per head per 24 hours

4.2.5

Results for the six selected sites reveals that for all sites with the exception of Lewes expenditure data can only be provided for day visitors, as the number of overnight visitors is too low (fewer than 10 visiting parties) to provide reliable results. The day visitor expenditure is a combined average for all day visitor types - local residents, day visitors from homes outside the South Downs and those visiting for the day whilst staying in accommodation outside the South Downs. The sample by site is too low to provide any other sub-group division among visitors.

Table 5: Average expenditure per head per day

	Base	Day visitors	Overnight visitors
Alice Holt Forest Park	80	£2.79	-
Queen Elizabeth Country Park	100	£5.11	-
Pulborough Brooks	79	£10.50	-
Devil's Dyke	94	£6.58	-
Lewes	97	£29.94	£95.44
Seven Sisters Country Park	81	£6.01	-

Note: Sample for overnight visitors too small to provide results for all sites except Lewes.

Lewes overnight expenditure based on 17 visiting groups only of which an avg. of £58.87 was spent on accommodation.

- 4.2.6 The results reveal significant variation in the average visitor expenditure among day visitors at each site, ranging from an average expenditure of only £2.70 per person at Alice Holt Forest Park to £29.94 at the historical town of Lewes.

4.3 Overall enjoyment with visit

- 4.3.1 Overall enjoyment of the visit to the South Downs was found to be exceptionally high. Almost all visitors rated the overall enjoyment of their visit as either 'high' or 'very high' (97% in total).

Figure 7: Level of overall enjoyment



- 4.3.2 The factors contributing most to the overall enjoyment with the visit was the tranquil scenic environment of the South Downs (mentioned by 86% of visitors) in terms of the sense of peace and quietness they found there and the beauty of the natural landscape.
- 4.3.3 Other factors mentioned less frequently but still mentioned by a sizeable proportion of visitors included being in a location where there was easy access to the countryside (mentioned by 34% of visitors) and being in a place where there was plenty of things to do and see (mentioned by 28% of visitors). For another fifth of visitors the general ease of travel to the South Downs in terms of it being served by a number of main roads (mentioned by 22% of visitors) was a central factor in overall trip enjoyment.
- 4.3.4 Another fifth (19%) mentioned the local heritage of the local area as a key factor driving overall enjoyment and a similar proportion (18%) mentioned the quality of places to eat and drink.
- 4.3.5 A full breakdown of results is presented in Table 20 in Appendix 1.

Figure 8: Factors contributing most to enjoyment



4.4 Aspects which make the South Downs special

- 4.4.1 A wide variety of aspects were mentioned by visitors when they were invited to give their opinion as to what made the South Downs special compared with other places. The full list which includes 46 different aspects is presented in Table 21 in the Appendices.
- 4.4.2 By far the most popular and dominant aspect mentioned by the vast majority of visitors (87%) was the natural beauty of the landscape and included comments on a range of features from rolling hills to spectacular sea views and the diversity of the flora and fauna. Several other features strongly related to the landscape were also mentioned but given the breadth of responses no one particular aspect was mentioned by more than 20% of visitors and included features such as the unspoilt and peaceful nature of the area (mentioned by 16% of visitors) and its 'uniqueness' (mentioned by 6% of visitors).
- 4.4.3 Having the South Downs literally on one's doorstep and its closeness to major urban conurbations which makes it easy to get to (served by a good network of main roads and train stations), was a special feature mentioned by 30% of all visitors. One in 10 visitors mentioned the quality of the footpaths, walks and cycle routes.

Figure 9: Aspects which make South Downs special



5 Visitor travel behaviour

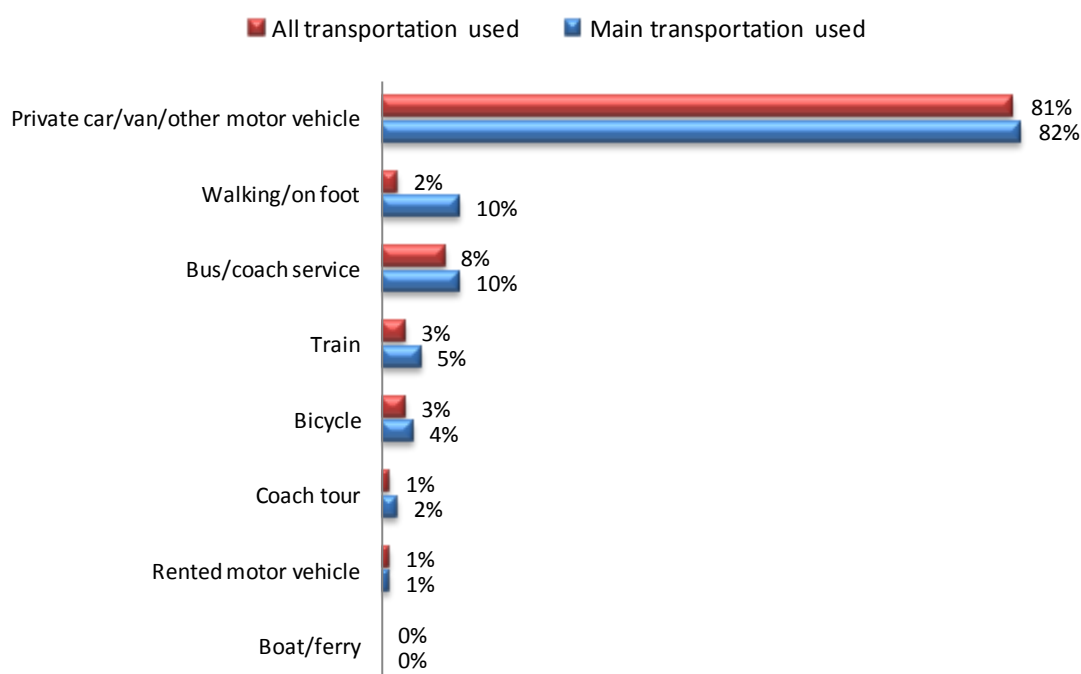
5.1 Main mode of transport used to travel to the South Downs

5.1.1 Visitors were asked about modes of transport used to travel to the South Downs and of *all the modes* used, the one which was their *main mode* of transport.

5.1.2 The results show little difference between *all* and *main* mode of transport used to travel to the South Downs. By far the most dominant mode of transport is the car (the results also include vans, campervans and motorcycles) with 81% of visitors mentioning this among all the modes of transport used and with 82% of visitors using it as their main mode of transport.

5.1.3 Non-car use is generally very low as a mode of transport to reach the South Downs.

Figure 10: Main and all modes of transport used to travel to South Downs



5.1.4 The relatively high car use is similar to the level found 10 years ago (when 85% of visitors were found to have travelled by car/van/motorcycle). The proportion of those travelling by car/van/motorcycle is also similar to the proportion identified by the visitor survey carried out in 2011/12 (80%).

Table 6: Main mode of travel to South Downs – comparative data

	2014	2011/12	2002/3
Private car/ van/ other motor vehicle	81%	80%	85%
Bus/ coach service	8%	9%	3%
Bicycle	3%	2%	2%
Train	3%	2%	1%
Walking/ on foot	2%	5%	5%
Rented motor vehicle	1%	n/a	-
Coach tour	1%	1%	2%

Source: 2011/12 Visitor Survey carried out by TSE Research and involved interviews with 6,815 visitors across the year. The 2002/3 Visitor Survey was also carried out by TSE Research and involved interviews with 7,420 visitors across the year. Comparable results from the earlier surveys are based on the summer period only.

- 5.1.5 Results on the main mode of transport used to reach the South Downs by visitor type reveals that private vehicle use is highest among local visitors. This high proportion of car use among local residents was also found in the 2011/12 survey and appeared to be driven by a large volume of local visitors travelling by car to specific sites from home to walk their dog(s).

Table 7: Main mode of transport to get to South Downs by visitor type

	All visitors	Day visitor (living within the SDs)	Day visitor (from outside the SDs)	Staying visitor (within the SDs)	Staying visitor (outside the SDs)
	1013	201	586	78	148
Private car/ van/ other motor vehicle	81%	87%	83%	71%	69%
Rented motor vehicle	1%	1%	1%	4%	3%
Bus/ coach service	8%	4%	8%	6%	16%
Coach tour	1%	-	0%	6%	5%
Bicycle	3%	3%	4%	3%	1%
Train	3%	2%	4%	4%	4%
Walking/ on foot	3%	5%	2%	5%	2%
Boat/ ferry	0%	-	-	1%	-

- 5.1.6 Results for the six selected sites reveal significant differences (see Tables 8 and 9). Car travel is by far the most dominant mode of transport used to reach Alice Holt Forest Park and Pulborough Brooks (both for all and main mode) with less than 10% of all visitors using other transport types. Car travel is also the most dominant mode of transport used to reach Queen Elizabeth Country Park (88% among all modes and 87% as main mode), but smaller numbers of visitors were found to have cycled, walked or used public transport among all the modes of transport used to get to the country park.
- 5.1.7 Public transport travel was found to be used more often by visitors travelling to Devil's Dyke, Lewes and Seven Sisters Country Park. Around a fifth of all visitors interviewed at Devil's Dyke and Lewes and a quarter of all visitors interviewed at Seven Sisters Country Park had used scheduled bus/coach services among all the modes of transport used to get there. The train service was also found to be an important mode of transport to travel to Lewes; a quarter of visitors used the train as one of the modes of transport.
- 5.1.8 Given that a significant proportion of visitors in the sample for Lewes were local residents, it is not surprising to find that many will have travelled to the town centre/high street on foot (where interviews took place). The survey found that half of all visitors to Lewes town centre had arrived on foot.

Table 8: Main mode of transport to get to South Downs by site (1)

Site	Alice Holt		QECP		Pulborough Brooks	
Base	80		102		80	
All & Main modes of transport	All	Main	All	Main	All	Main
Private car/ van/ other motor vehicle	94%	94%	88%	87%	96%	96%
Rented motor vehicle	4%	4%	0%	0%	1%	1%
Bus/ coach service	1%	1%	2%	2%	0%	0%
Coach tour	0%	0%	1%	1%	0%	0%
Bicycle	1%	1%	6%	4%	1%	1%
Train	0%	0%	2%	2%	0%	0%
Walking/ on foot	0%	0%	9%	4%	1%	1%
Boat/ ferry	0%	0%	1%	0%	0%	0%

Table 9: Main mode of transport to get to South Downs by site (2)

Site	Devil's Dyke		Lewes		Seven Sisters	
Base	100		96		100	
All & Main modes of transport	All	Main	All	Main	All	Main
Private car/ van/ other motor vehicle	67%	67%	75%	70%	72%	70%
Rented motor vehicle	0%	0%	1%	1%	2%	2%
Bus/ coach service	22%	21%	18%	9%	24%	17%
Coach tour	0%	0%	4%	3%	1%	1%
Bicycle	9%	9%	1%	0%	1%	1%
Train	1%	1%	24%	16%	10%	8%
Walking/ on foot	6%	2%	50%	0%	4%	1%
Boat/ ferry	0%	0%	1%	1%	0%	0%

5.1.9 In Table 10 average expenditure among all visitors (per person per 24 hours) has been cross-tabulated with main mode of transport used to travel to the South Downs.

5.1.10 It shows, perhaps surprisingly, that those who travelled by bicycle spent on average more than those arriving by car, bus and coach (tour). This is a result of a higher spend among cyclists on food and drink. Excluding accommodation costs, those arriving by train spent the most overall (£19.54 per person per day) and those arriving on foot spent the least (£4.79 per person per day).

5.1.11 However, those arriving by car were more likely to be staying overnight in the South Downs and thus incurred additional expenditure on accommodation – an average of £28.86 per person per night. Unfortunately the sample for overnight visitors is too small to provide average expenditure on accommodation by mode of transport except for the car (incl.vans, motorhomes & motorcycles).

Table 10: Average spend per head per day by transport mode (used to get to the South Downs)

	Car	Bus	Coach tour	Bicycle	Train	On foot
Base	829	80	14	30	34	25
Travel / transport	£1.78	£1.81	£0.00*	£0.69	£8.81	£0.09
Food and drink	£5.20	£4.87	£3.67	£9.53	£5.78	£4.27
Admission charges/ spending at attractions	£0.72	£0.05	£0.86	£0.00	£0.32	£0.00
Other leisure and recreation	£0.20	£0.08	£0.17	£0.00	£0.00	£0.00
Shopping for daily needs	£0.59	£0.18	£1.03	£0.31	£0.45	£0.22
Other shopping	£1.40	£0.43	£1.26	£0.00	£3.97	£0.22
Any other expenses	£0.08	£0.25	£0.34	£0.00	£0.20	£0.00
Average spend	£9.98	£7.67	£7.34	£10.53	£19.54	£4.79
<i>Accommodation (free and paid for)</i>	<i>£28.86</i>					

Note: these are aggregated results for all visitor types.

Accommodation average expenditure based on sample of 51 visiting groups travelling by car.

* It is unlikely that those travelling with a coach tour will spend any additional money of travel/transport as this will be included in the trip package.

5.2 Reasons for choosing transport mode to get to the South Downs

- 5.2.1 Convenience was the top and most dominant reason mentioned by visitors (65%) for using the main mode of transport they did for travelling to the South Downs. A further 15% reported that their choice of transport was driven by their belief that there was no suitable alternative mode of transport available to reach the South Downs.

**65% of visitors report
convenience is main reason for
transport choice to get to
South Downs**

- 5.2.2 These two reasons – convenience and perceived lack of alternatives for the choice of transport were the same two top reasons provided by visitors in 2011/12 (59% mentioned convenience and 20% mentioned lack of alternatives).
- 5.2.3 In this year's survey a minority of visitors (5%) mentioned other reasons for using the transport they did and a review of these comments shows many of them to be strongly related around convenience and practicality, such as travelling in a van to bring over canoes. See Table 22 in Appendix 1 for a full list of 'other' responses.

Table 11: Main factor in decision to use transport mode to get to South Downs

Base	1013
Convenience	65%
Lack of alternatives	15%
Other reasons not listed	5%
Cost	4%
Part of the experience	4%
Will need this transport once at the destination	3%
Health benefits	3%
Speed	2%
Environmental impact	1%
Incentives	0%
Promotions/ marketing activity	0%

- 5.2.4 The above results split by the main mode of transport used to travel to the South Downs (see Table 12 overleaf) reveals unsurprisingly that 'convenience' was the main reason given by a greater proportion of visitors arriving by car compared to other transport modes, and that 'Part of the experience' and health benefits were more likely to be reasons given by those arriving on bicycle or on foot.
- 5.2.5 Cost was the main reason given by a fifth of all visitors arriving by scheduled bus and coach services and travelling as part of a coach tour.

Table 12: Main reason for transport used by main mode of transport to South Downs

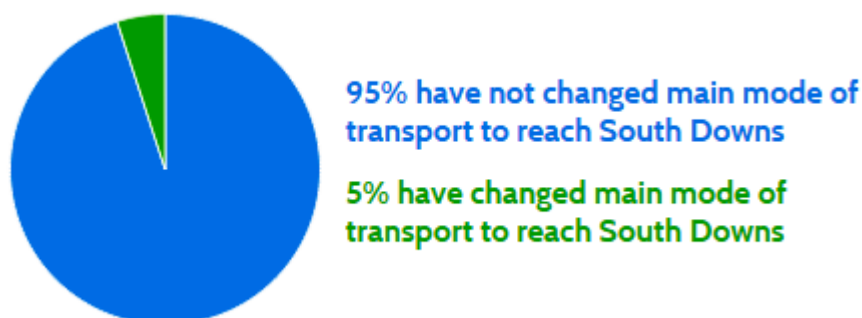
	All	Private car	Rented motor vehicle	Bus/coach service	Coach tour	Bicycle	Train	Walking/on foot
Base	1013	817	12	80	14	30	34	25
Convenience	65%	74%	50%	34%	29%	*	47%	4%
Lack of alternatives	15%	16%	8%	20%	7%	*	18%	4%
Part of the experience	4%	1%	25%	10%	14%	33%	6%	20%
Cost	4%	2%	*	20%	21%	*	9%	*
Health benefits	3%	0%	*	1%	*	47%	*	44%
Will need this transport once at the destination	3%	3%	8%	*	*	*	*	*
Speed	2%	2%	*	*	*	*	18%	*
Environmental impact	1%	*	*	4%	*	10%	*	4%

Note: Private car includes vans and motorcycles

5.3 Whether transport used to travel to the South Downs has changed

5.3.1 The overwhelming majority of visitors (95%) reported that their choice of transport for travelling to the South Downs had not changed in the past 12 months.

5.3.2 Among the 5% of visitors who had changed their mode of transport for travelling to the South Downs in the past 12 months, most were visitors who travelled by car (75%) and appear to have switched to the car from using other modes previously. For example five visitors mentioned that they normally cycled, but particularly needed the car for this trip, whilst a few others stated they switched from using the train to using a car as a result of now having a car of their own or finding driving cheaper than coming by train. See Table 21 in Appendix 2 for full list of responses.

Figure 11: % of visitors who have changed transport type to travel to South Downs

5.4 Main mode of transport used to travel around the South Downs

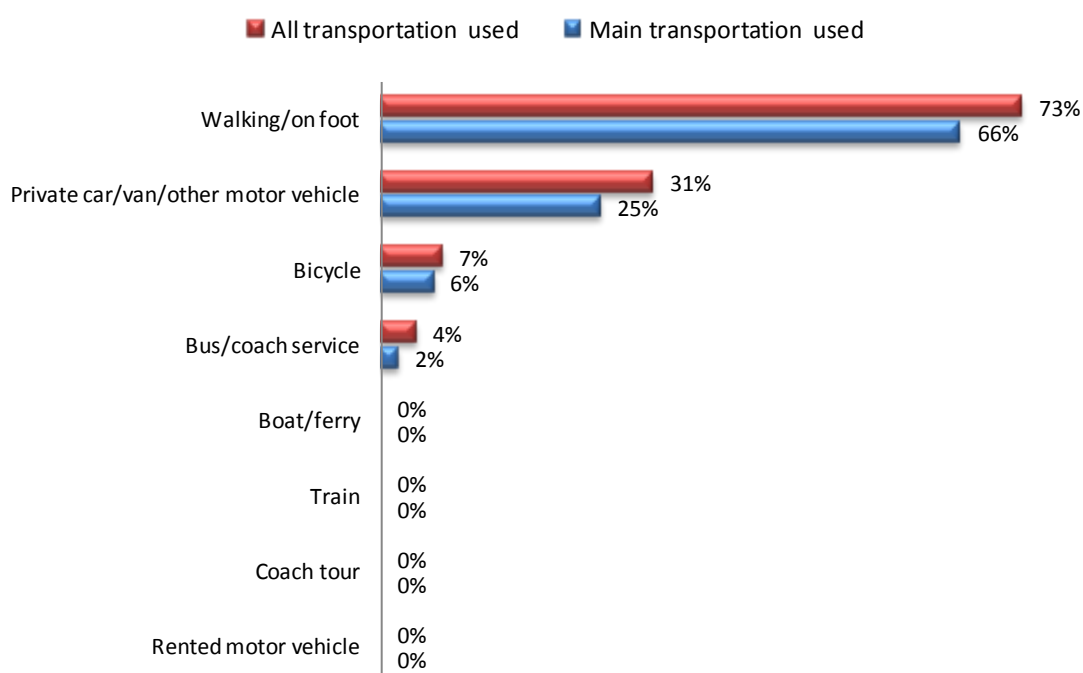
5.4.1 As with the question on transport used to travel to the South Downs, visitors were asked about *all* and *main* modes of transport used to travel around the South Downs once they had arrived.

5.4.2 The results show a significant difference in the main mode of transport used for travelling around the South Downs compared to the main mode used to travel to the South Downs. For travelling around the South Downs, walking is the most dominant with over two-thirds (66%) travelling around on foot as the main mode of transport and three quarters (73%) travelling around on foot as one of the modes of transport used.

5.4.3 The use of the private motor vehicle is reduced to 31% as a one of the modes of transport used for travelling around and to a fifth (25%) as the main mode of transport used for travelling around the South Downs.

5.4.4 The survey also found that the overall proportion of visitors using bicycles as one of the modes of transport to travel around the South Downs (7%) is double the proportion of visitors who used it as one of the modes of transport to travel to the South Downs (3%).

Figure 12: Main and all forms of transport used to travel around the South Downs



5.4.5 The results do not suggest any significant difference in the main mode of transport used to travel around the South Downs by visitor type. Travelling around on foot is the most popular for all visitor types though more dominant among day visitors than those on overnight trips and likewise travelling around by car is more common among staying visitors than day visitors.

Table 13: Main mode of transport to travel around the South Downs by visitor type

	All	Day visitor (living within the SDs)	Day visitor (from outside the SDs)	Staying visitor (within the SDs)	Staying visitor (outside the SDs)
Base	1013	199	578	78	147
Walking/ on foot	66%	66%	68%	60%	58%
Private car/ van/ other motor vehicle	25%	26%	23%	32%	30%
Bicycle	6%	5%	7%	5%	3%
Bus/ coach service	2%	3%	2%	1%	5%
Rented motor vehicle	0%	*	0%	*	2%
Coach tour	0%	*	0%	*	1%
Boat/ ferry	0%	1%	0%	1%	*
Train	0%	*	0%	*	*

5.4.6 The results split by the six selected sites reveal that travelling around on foot is the main mode of transport used by almost all visitors at Alice Holt (93%) and a small proportion travel around on

bicycle (8%)². Nearly all visitors to Lewes were found to have travelled around the area on foot as one of the modes of transport used, and car travel was used by only one in 10 visitors as the main mode of transport for getting around the town.

5.4.7 The results for the other sites indicate that visitors are likely to have interpreted the geography in question differently. From the responses it would appear that some visitors interpreted travelling around 'this area' as the specific site where they were interviewed, e.g. Alice Holt, but for others 'this area' may well have been understood to refer to the wider town or village in which the site is located, or even more general in terms of 'this part of the South Downs'.

5.4.8 This is because a proportion of visitors reported to travel around the area by car when clearly it is not possible to do so. For example, at Pulborough Brooks, visitors would normally walk along the public footpaths and bridleways to travel around the nature reserve and a motorised buggy is available for wheel chair users. Yet according to the visitor survey results 30% of visitors travelled around the area by car as one of the modes of transport and 25% travelled around by car as their main mode of transport. As visitors are actually unable to travel on the footpaths and bridleways by car, it is likely that visitors who reported to using their car were referring to a visit to the area which included the town of Pulborough, or the wider Arun Valley or both rather than just the nature reserve.

Table 14: All and main mode of transport to travel around the South Downs by specific sites (1)

Site	Alice Holt		QECP		Pulborough Brooks	
Base	80		102		80	
<i>All & Main modes of transport</i>	<i>All</i>	<i>Main</i>	<i>All</i>	<i>Main</i>	<i>All</i>	<i>Main</i>
Walking/ on foot	96%	93%	69%	68%	71%	71%
Bicycle	18%	8%	18%	14%	3%	3%
Private car/ van/ other motor vehicle	0%	0%	18%	18%	30%	25%
Rented motor vehicle	0%	0%	0%	0%	1%	1%
Bus/ coach service	0%	0%	1%	1%	0%	0%
Boat/ ferry	0%	0%	0%	0%	0%	0%

Table 15: and main mode of transport to travel around the South Downs by specific sites (2)

Site	Devil's Dyke		Lewes		Seven Sisters	
Base	100		96		100	
<i>All & Main modes of transport</i>	<i>All</i>	<i>Main</i>	<i>All</i>	<i>Main</i>	<i>All</i>	<i>Main</i>
Walking/ on foot	75%	69%	98%	87%	85%	68%
Bicycle	10%	10%	0%	0%	5%	3%
Private car/ van/ other motor vehicle	20%	19%	16%	10%	38%	20%
Rented motor vehicle	0%	0%	1%	1%	1%	1%
Bus/ coach service	2%	2%	5%	2%	12%	5%
Boat/ ferry	0%	0%	0%	0%	3%	3%

5.4.9 Comparable data on the transport types used to travel around the South Downs during the visit is not available from the two earlier surveys as this specific question was not included in the questionnaire.

² It should be noted that the bicycle hire hut at Alice Holt was shut over the summer and this may have led to a lower proportion of travel around the area by bicycle.

5.5 Reasons for choosing transport mode to travel around the South Downs

5.5.1 With regard to the reasons for choosing the mode of transport to travel around the South Downs, the survey found more of a mix of reasons. Just under a third (29%) mentioned that convenience was once again the main factor behind transport choices (mentioned by 63% of car users, see Table 17), and a quarter of visitors stated that the transport they chose was 'Part of the experience'.



5.5.2 A fifth (19%) reported that their transport choice was based on the health benefits it provided and 15% felt there was no other alternative. A further 7% mentioned other reasons and these included practical reasons such as needing to walk the dog and choosing the particular transport type because it was fun or recreational (e.g. bike hire). See Table 24 in Appendix 1 for a full list of 'other' responses.

Table 16: Main factor in decision to use transport mode to travel around the South Downs

Base	1013
Convenience	29%
Part of the experience	25%
Health benefits	19%
Lack of alternatives	15%
Other reasons for listed	7%
Cost	1%
Speed	1%
Environmental impact	1%
Will need this transport once at the destination	1%
Incentives	*
Promotions/ marketing activity	*

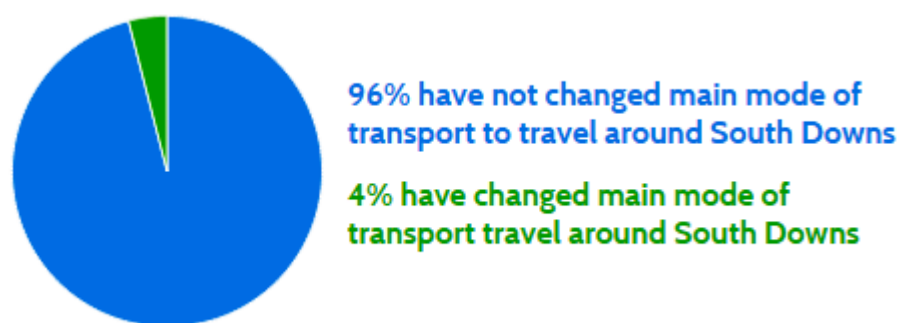
Table 17: Main reason for transport used by main mode of transport to get around the South Downs

	Private car	Bus service	Bicycle	On foot
Base	251	24	57	658
Cost	2%	21%	0%	1%
Convenience	63%	38%	7%	18%
Lack of alternatives	16%	17%	9%	15%
Speed	2%	4%	0%	1%
Environmental impact	0%	4%	2%	1%
Part of the experience	6%	8%	33%	32%
Will need this transport once at the destination	2%	0%	0%	0%
Health benefits	3%	4%	39%	25%
Incentives	0%	0%	0%	0%
Promotions/ marketing activity	0%	0%	0%	0%
Other reasons	6%	4%	11%	7%

5.6 Whether transport used to travel around the South Downs has changed

- 5.6.1 All but 4% visitors reported that their choice of transport for travelling around the South Downs had not changed in the past 12 months. This needs to be put in the context that the use of private motor vehicles is already relatively low as a mode of transport for getting around the South Downs.
- 5.6.2 The survey found that visitors who replied they had changed their choice of transport for travelling around the South Downs in the past 12 months were far more likely to have been travelling around on foot on this recent visit (76%) suggesting a switch from another transport mode used on previous visits.
- 5.6.3 However, the results do not suggest that visitors changed from previously using a car to changing to walking as the comments provided by these visitors on reasons for changing reveals that most of these visitors tended to alternate between cycling and walking around the South Downs, that is they may previously have cycled but this time are mainly walking (than having previously driven). See Table 25 in Appendix 1 for full list of responses.

Figure 13: % of visitors who have changed transport type to travel around South Downs



5.7 Information on travelling in environmentally friendly ways

- 5.7.1 Visitors were asked whether they had seen anything about travelling in environmentally friendly ways in the area, for example, advertising for buses, cycling or electric car hire, prior to their visit and during their visit. The survey found that fifth of visitors (19%) had seen information on travelling in environmentally friendly ways prior to their visit and 11% had across this information during their visit.

Table 18: Whether seen any information prior and during visit

Base 1,013	Yes	No	Don't know
Prior to your visit	19%	80%	1%
During your visit	11%	88%	1%

- 5.7.2 Visitors were also asked if they encountered information on travelling in environmentally friendly ways through four specific channels of communication. These were social media, the internet, print (e.g. poster, leaflet, newspaper) and 'other form of advert' (e.g. bus back).
- 5.7.3 The results reveal that printed material was mentioned most frequently, closely followed by another form of advert such as a banner advert on the back of a bus. Overall, however, relatively few came across such information through these channels.

Table 19: Whether seen any information on various channels

	Yes	No	Don't know
On social media	3%	96%	1%
On the web	6%	92%	1%
In print (e.g. poster, leaflet, newspaper)	12%	86%	1%
Other form of advert (e.g. bus back)	11%	87%	1%

5.8 Key factor which would encourage sustainable travel

- 5.8.1 Those travelling to and around the South Downs by car were asked whether there was one thing which would make them consider forms of transport other than the car. Nearly half of all car users (48%) felt they had no real choice but to travel with their car for a number of practical reasons such as carrying heavy outdoor equipment, travelling with several small children or with several dogs, and therefore did not foresee that it would be possible to change.
- 5.8.2 Around 1 in 10 (13%), however, reported that they would change if convenient and practical alternatives were made available, whilst others would consider change if low cost alternatives were available (6%).

Figure 14: One main factor which would encourage use of transport other than car



- 5.8.3 Other visitors articulated this interest in environmentally friendly modes of transport in terms of significant improvements made to existing provision such as a better public transport system (mentioned by 13% of visitors) including more train and bus routes, better time-tables, and a more reliable and regular service. Some visitors commented specially about a better local bus service (7%), particularly having more bus stops closer to home. See Table 26 in Appendix 1 for full list of responses.
- 5.8.4 The 2011/12 visitor survey did not pose a specific question to car users about whether they would consider using non-car travel for their next and future visits to the South Downs. However, all visitors were asked whether they would consider using public transport for their next visit and the results reveal car users were the most reluctant to change to public transport; 83% reported that they were unlikely to consider using public transport and most (68%) perceived that it was not convenient enough to do so.
- 5.8.5 Notwithstanding the difference in the wording of the question, this year's survey found a lower proportion of car users unwilling to change from car travel (45%), which may be indicative of an increase in the proportion of car users prepared to use non-car transport to get to and travel around the South Downs in the future. See Table 27 and Table 28 in Appendix 1 for full list of responses from the 2011/12 survey on responses to public transport use.

6 Appendix 1: Accompanying tables

Table 20: List of factors contributing to trip enjoyment

Base	1009	
Tranquil scenic environment	864	86%
Good access to the countryside	341	34%
Plenty of things to see and do	287	28%
Easy to get to	220	22%
Local heritage/ history	191	19%
Good places to eat/ pubs/ cafes	182	18%
Fresh air/ exercise/ enjoyment of the outdoors	145	14%
Local events	107	11%
Special qualities relating to the SD landscape	92	9%
Good weather	91	9%
Good value for money	79	8%
Child friendly activities/ environment	70	7%
Nature/ wildlife/ birds etc	57	6%
Signage/ walking & cycling routes/ paths/ trails	35	3%
Activities & facilities on offer	23	2%
Clean/ tidy/ well maintained	22	2%
Good for dog walking/ dog friendly	17	2%
Unspoilt/ uncrowded/ uncommercialised	14	1%
Good company/ friends/ family	13	1%
Safe	11	1%
Great place to visit	9	1%
Relaxing/ nice atmosphere/ ambience	6	1%
Variety	6	1%
Nice people/ friendly	5	0%
Accessible	5	0%
Nice local shops/ shopping environment	5	0%
Ice cream van	4	0%
Nostalgia/ memories	4	0%
Good for photography	4	0%
Something for all age groups	3	0%
New memorial to airmen/ memorials	2	0%
Easy to get around	2	0%
The opera at Glynde	1	0%
Harvey Brewery - quirky and different	1	0%
Changes over the seasons	1	0%
Bell ringing (Alfriston)	1	0%
Good for kayaking	1	0%
Birling Gap	1	0%
Autumn colours	1	0%
Lots to explore	1	0%
Educational	1	0%
Lots of improvements	1	0%

Multiple responses permitted

Table 21: Aspects which make the South Downs special

Base	959	
Natural beauty/variety of landscape and flora & fauna	833	87%
Proximity & ease of access	284	30%
Unspoilt and peaceful	156	16%
Good footpaths/ walks/ cycle routes/ trails	96	10%
Unique/ special/ nowhere quite like it/ different from home	60	6%
Lots to see and visit/ explore/ different activities on offer	42	4%
Open space/freedom to roam	46	5%
Familiarity/ nostalgia/ memories	41	4%
History/ historic houses & monuments	31	3%
Nice local towns/ buildings and shops	22	2%
Beautiful villages/ small villages	18	2%
Height & distance/ the size of it	16	2%
Hills/ terrain great for running/ cycling/ recreation	15	2%
Clean/ tidy/ well managed	14	1%
Friendly people/ environment	14	1%
Clean/ fresh air	13	1%
It has character/ ambience/ very 'English'	12	1%
Good weather/ nice climate relative to other places	10	1%
Nice cafes/ pubs/ good food/ good places to eat	9	1%
Good on site facilities	9	1%
The kids love it/ good for families/ child friendly	8	1%
Family/ friends live in the area/ good place to meet friends	8	1%
Accessibility (on site)	7	1%
Good information/ signage	7	1%
Individual/ independent shops/ antique shops	6	1%
Nice contrast to the sea	4	0.4%
Easy parking	4	0.4%
A feeling of belonging	4	0.4%
Art exhibition/ artists	4	0.4%
Special events/ activities/ courses	3	0.3%
River meanders/ Cuckmere river	3	0.3%
Lighthouse/ Beachy Head	3	0.3%
Glyndebourne opera house	2	0.2%
Always find something I haven't seen before	2	0.2%
Dog friendly	2	0.2%
Paragliding	1	0.1%
Golf	1	0.1%
Safe	1	0.1%
It's free	1	0.1%
Pedestrianised shopping area (Lewes)	1	0.1%
The Grange (Lewes) is why we come here	1	0.1%
Old hill forts	1	0.1%
Good for photography	1	0.1%
Juniper area (QECP)	1	0.1%
Good for the local economy	1	0.1%
Gardens	1	0.1%

Multiple responses permitted

Table 22: 'Other' factors in decision to use main mode of transport to get to South Downs

Base	47
Part of tour/ excursion	5
Walking/ riding/ cycling the South Downs Way	5
Disabled	5
Organised trip	4
Support vehicle for walkers/ cyclists	3
Ease of access	2
Dog(s) in car	2
Enjoyment & exercise	2
Went elsewhere before coming here	2
Weather	2
En route elsewhere	2
Distance	2
Novelty of open top bus	1
Race training	1
Entertainment for children (open top bus)	1
Carrying canoes	1
Easier to park a motorcycle than a car	1
Five dogs not feasible on a bus	1
Camping in the campervan	1
Touring Southern England by car	1
Easy parking	1
Used the bus last time I visited	1
Poor health/ recovering from an operation	1

Note results presented as counts and not percentages as sample is small

Table 23: List of reasons why transport to get to South Downs has changed

Base	51
Sometimes/ usually use the bus	5
Usually cycle, but needed the car today	5
Only recently purchased the car	4
Medical reasons	3
No longer have a car	3
Used train before (now have a car)	2
Sometimes use the car	2
Sometimes use the train	2
Cheaper to drive than come by train	2
Difficult route on the train	2
Discount card for the train so use this sometimes	1
Got back into cycling	1
Training for a charity bike ride	1
Now have a bus pass so will use buses more	1
Would have used a bus if coming straight here but had another place to go first	1
I don't drive - my family drove me this time	1
Can't use bus pass on open top bus	1
Sometimes use a motorcycle	1
Usually bring grandchildren	1
Moved - now closer to a bus route	1
Sometimes use the train to Petersfield then cycle	1
Easier to get around with the baby (might have used train/ cycle before)	1
If two of us come we get the bus - more economical in the car with 4 people	1
Now own a motorhome	1
Meeting friends here	1
Sometimes cycle, sometimes walk	1
Usually walk or run here	1
Recently retired so have more time	1
Visiting with an organised group this time	1
Have cycled before when visiting without the children	1
Sometimes need a wheelchair	1

Note results presented as counts and not percentages as sample is small

Table 24: 'Other' factor in the decision to use main mode of transport to get around SDs

Base	73
Walking dogs	29
Fun/ enjoyment/ recreation	12
Disabled/ limited mobility	8
Relaxing	3
Support vehicle for walkers/ cyclists	3
Sightseeing	2
Wanted to walk the South Downs Way	2
Part of a tour	2
Organised activities for children (nature walk etc)	2
Novelty of an open top bus	1
Using vehicle for work	1
Carrying canoe equipment	1
Cycling the South Downs Way	1
Shopping	1
Blackberrying	1
Wheelchair user on accessible walk	1
Teambuilding exercise	1
Unsettled weather	1
To see nature	1

Note results presented as counts and not percentages as sample is small

Table 25: Reasons for changing transport type to get around South Downs

Base	38
Sometimes cycle, sometimes walk	22
Recently purchased a car	2
Change in circumstances	1
New hobby	1
Got back into cycling	1
Medical reasons	1
No longer have a car	1
Fewer bus services	1
Sometimes use the train	1
Sometimes/ usually use the bus	1
Just recently got the dog - never walked before	1
Easier to get around with the baby	1
New powered mobility trike	1
Before my accident I used to walk all around the South Downs	1
Have cycled before when visiting without the children	1
Sometimes bring scooters	1

Note results presented as counts and not percentages as sample is small

Table 26: What would make visitors consider forms of transport other than the car

Base	862
Nothing is likely to make me change transport used	45%
Better public transport system	13%
Convenient/practical alternatives	13%
Better bus service	7%
Low cost alternatives	6%
Depends on distance	2%
More information	2%
Safer roads/ more (off-road) cycle paths	2%
Would consider alternatives if on my own	1%
If I could no longer drive	1%
Only if in better health/fitter	1%
Concessionary travel	1%
Obtaining bicycle to ride (own/hired)	1%
Better ease of access	1%
Making cycling more enjoyable	1%
Better advertising/ publicity	1%
Better railway service	0.4%
If I had more time	0.4%
Would change for health benefits	0.4%
Better cycle lanes	0.3%
Obtaining bike to ride (own/hired)	0.3%
Better train service	0.1%
Obtaining horse to ride (own/hired)	0.1%

Table 27: Whether would consider using public transport on next visit – results by main transport used from 2011/12 survey

	All	Car	Bicycle	Bus/coach	Train	Coach tour	Walked	Other
	3990	3194	98	353	83	57	195	10
Yes	25%	15%	24%	88%	96%	26%	45%	30%
No	73%	83%	74%	11%	4%	67%	50%	70%
Maybe	3%	3%	3%	1%	-	7%	5%	-

Table 28: Reasons for not using public transport on next visit - results by main transport used from 2011/12 survey

	All	Car	Bicycle	Bus	Train	Coach tour	Walked	Other
	2962	2693	72	41	3	42	104	7
Cost	3%	3%	6%	-	-	5%	3%	-
Ease of access	7%	7%	4%	10%	33%	10%	9%	14%
Time	5%	5%	4%	2%	-	5%	8%	-
Safety	2%	2%	1%	-	-	-	1%	-
Not very convenient	65%	68%	44%	42%	67%	43%	33%	43%
Not on route	14%	15%	7%	2%	-	-	11%	14%
Not aware of any public transport	10%	9%	3%	34%	-	41%	10%	14%
Weather	0%	0%	-	-	-	-	2%	-
Other reason	8%	5%	35%	12%	33%	7%	39%	29%

Q11. Which ONE of the following was the main factor in your decision to use this main mode of transport to get around the area?

(SHOWCARD 3: select ONE response)

Cost	-1
Convenience	-2
Lack of alternatives	-3
Speed	-4
Environmental impact	-5
Part of the experience	-6
Will need this transport once at the destination	-7
Health benefits	-8
Incentives	-9
Promotions/ marketing activity	-10
Other (please specify below)	-11

Q12. Has your choice of transport for this type of journey changed in the last 12 months?

Yes -1 No -2

If YES, please tell us why:

.....

.....

.....

Q13. Have you seen anything about travelling in environmentally friendly ways in this area, for example, advertising for buses, cycling or electric car hire?
(READ OUT and record a response for each row)

	YES	NO	Don't know
a) Prior to your visit	-1	-2	-3
b) During your visit	-1	-2	-3
c) On social media	-1	-2	-3
d) On the web	-1	-2	-3
e) In print (e.g. poster, leaflet)	-1	-2	-3
f) Other form of advert	-1	-2	-3
(e.g. bus back)			

Q14. What ONE THING would make you consider forms of transport other than the car?

.....

.....

.....

Q15. How would you rate your level of overall enjoyment of your visit to this part of the South Downs today?
Use 5 point scale where 1= 'very poor' and 5= 'very high'

Very poor -1 High -4
 Poor -2 Very high -5
 Average -3
 Don't know -6

Q16. What factors contributed to your enjoyment of the South Downs? DO NOT PROMPT. Select all mentioned or write other response(s) in the space provided.

Tranquil scenic environment	-1
Good value for money	-2
Good places to eat	-3
Plenty of things to see and do	-4
Easy to get to	-5
Good access to the countryside	-6
Local events	-7
Local heritage	-8
Other (please specify below)	-9
.....	
.....	
.....	

Q17. What aspects make the South Downs special compared to other destinations you have visited?
Write responses in the space provided

.....

.....

.....

.....

Q18. Please tell us approximately how much YOU AND YOUR IMMEDIATE PARTY expect to spend TODAY in the South Downs on the following?
Please do not leave blanks. Put '0' if spent nothing on any of the categories below.

Accommodation (only if staying overnight within the National Park)	£
Travel/ transport (incl. fares, fuel, parking etc) ...	£
Food & drink	£
Admission charges/ spending at attractions.....	£
Other leisure/ recreation	£
Shopping for daily needs	£
Other shopping	£
Any other expenses	£

Q19. Finally, please tell us your postcode

Note: this is for mapping and analysis purposes only – it will not be used for marketing or to identify individuals. Please probe for the FULL postcode. If non-UK visitor, please record the Country of residence.

Postcode:

Q20. Last of all, please 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 of this questionnaire.

Name of respondent: _____

Email / Tel: _____

THANK YOU FOR YOUR TIME