South Downs National Park Authority

Visitor Survey 2015

Final report

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Authors

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1. Background

This is the third visitor survey to have been undertaken since the formation of the South Downs National Park (SDNP). Previous surveys were conducted in 2011 and 2014.

In July 2015 Tourism South East Research were commissioned to conduct the fieldwork on behalf of the South Downs National Park Authority (SDNPA). Thirteen 'honey pot' survey sites in the South Downs National Park (SDNP) were selected and over 1,000 face to face interviews were conducted with visitors between July and September 2015. The table below shows the 2015 and 2014 comparison of interviews achieved at the 13 survey sites.

Table 1. Interviews achieved by site

	2015		2014		
Survey site	No. ints achieved	% all ints.	No. ints achieved	% all ints.	Variance
Devil's Dyke	91	8.9%	100	9.9%	-0.9%
Seven Sisters Country Park	90	8.8%	100	9.9%	-1.0%
Alice Holt Forest Park	90	8.8%	80	7.9%	0.9%
Midhurst	90	8.8%	76	7.5%	1.3%
Beachy Head	90	8.8%	74	7.3%	1.5%
Lewes	89	8.7%	96	9.5%	-0.7%
Old Winchester Hill	89	8.7%	67	6.6%	2.1%
Queen Elizabeth Country Park	88	8.6%	102	10.1%	-1.4%
Ditchling Beacon	62	6.1%	75	7.4%	-1.3%
Alfriston	61	6.0%	68	6.7%	-0.7%
Pulborough Brooks	60	5.9%	80	7.9%	-2.0%
Harting Down	59	5.8%	50	4.9%	0.9%
Weald and Downland Museum	59	5.8%	45	4.4%	1.4%
Total	**1018**	**100%**	**1013**	**100%**	

This report compares the results from the 2015 survey with those from 2014[1].

[1] Note that the results are not comparable with the 2011 survey as this was conducted at a different time of year and alongside much larger scale pieces of research such as an economic study. In addition, few of the questions were the same.

2. Key findings and recommendations

The key findings were:

1. 99% of visitors rated their enjoyment as high or very high
2. Slight increase in public transport usage when compared to 2014
3. Slight decrease in the use of car/van/other private vehicle as main mode of transport
4. In general people are visiting the South Downs National Park to walk, watch wildlife or cycle.
5. Three quarters of visitors are day visitors or local residents
6. Spend/day/person is higher amongst overnight visitors compared to day visitors
7. Accommodation spend by those staying outside the park is almost £10/night/person higher

Key recommendations:

Focused campaigns in individual visitor attractions such as the Weald and Downland Museum have strong potential for growth in sustainable transport use.

Potential for encouraging sustainable transport use by linking promotions with popular activities such as visiting pubs/cafes/tea rooms.

Future surveys would benefit from breaking down accommodation type used to deepen understanding of visitor spending habits. Also determining whether the national park is the primary reason for visiting the area could create a strong business case for income generation in the tourism sector.

3. Introduction

The 2015 South Downs National Park (SDNP) visitor survey was undertaken to compare the survey results with previously obtained baseline data. The purpose was to assess any change in visitor behaviour as a result of the impact of recent initiatives undertaken by the South Downs National Park Authority (SDNPA)

The survey was undertaken at 13 sites across the SDNP and involved face to face interviews with 1,018 visitors between July and September 2015. Interviews were conducted at different times of day and on different days of the week at these locations to ensure a broad range of visitors were represented in the sample.

The 2015 survey was broadly similar to the 2014 survey to allow certain comparisons to be made. Key differences in the 2015 survey are as follows:

- Addition of the option '*with family and friends'* to the question 'Who are you visiting with today'?
- Gender and age question combined with the question regarding the number of people in a party to more accurately capture whole group composition
- Removal of questions around whether respondents had visited that part of the SDNP before
- Removal of the question about visitors' mode of transport *within* the SDNP – we are more interested in their main mode of transport *to* the SDNP
- Removal of the question asking the main factor in the decision to use the main mode of transport and motivators for change. We have enough data from previous surveys around this issue, as well as around motivators for change of transport mode
- Inclusion of additional response options for the question on factors contributing to enjoyment to gather even more useful information
- Inclusion in 2015 of a question around what people plan to do in the area that day (*this is in line with the New Forest National Park who added this to their 2015 survey*)
- Separation out of accommodation spend into a separate question so we now have two questions on visitor spend.

As there is only a years' gap between surveys it is unlikely that any significant changes occurred in that time. However, when the survey is next undertaken in three years' time

(2018), we would expect to see greater variance between key findings – most notably mode of transport to survey sites due to the significant work the organisation is currently undertaking around promoting public transport usage and investment in cycling infrastructure.

We have provided a breakdown by survey site for key results where 88 or more interviews were achieved. These sites are highlighted in the table on page 1. Do note however that these sample sizes are still small and therefore the results should be treated with some caution.

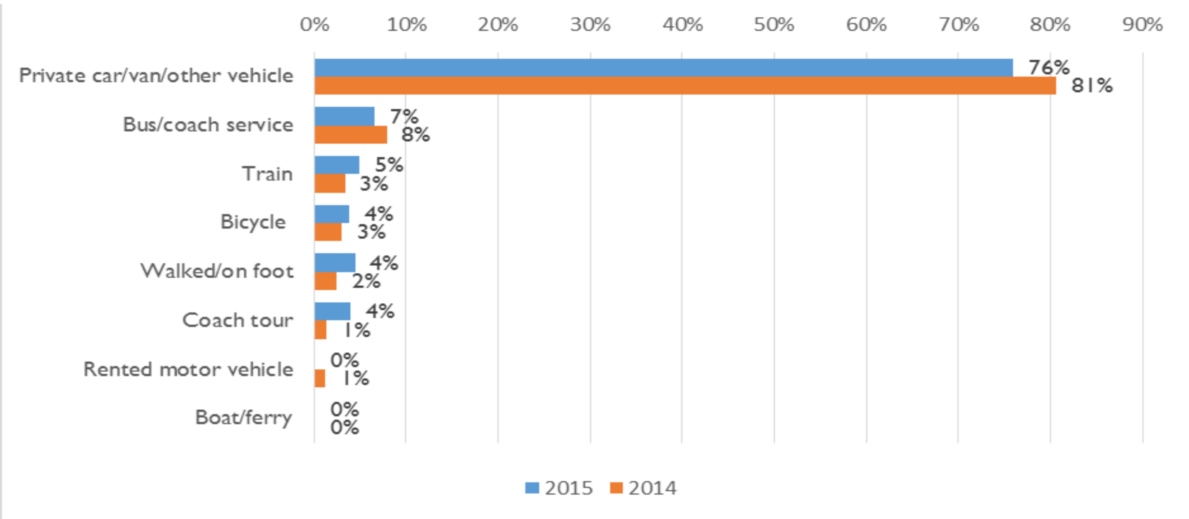
Note that survey results are presented as whole percentages, therefore this rounding up or down to the nearest whole number meaning some totals may equal more than 100%.

4. MAIN mode of visitor transport

As can be seen in the chart below, there has been a 5% *decrease* in visitors using a **private car/van/other vehicle** as their MAIN mode of transport to get to the area – down from 81% in 2014 to 76% in 2015. This is a continuation of a positive trend towards usage of more sustainable modes of transport, with 2011 and 2004 visitor studies showing 83% and 84% car use respectively.

Perhaps as a direct result of the increased promotional activity the SDNPA has undertaken around encouraging usage of sustainable forms of transport[2], public transport usage has seen a slight increase. Up from 11% of visitors surveyed using bus/coach or train in 2014 to 12% in 2015.

Chart 1. Main mode of transport



Base (all who provided a response to this question): 1,009 (2015); 1,013 (2014)

Note that cycling was split into two options in 2015. 3.7% of respondents used their own bicycle and 0.2% hired one. It is anticipated that in three years' time we will see an increase in those using their bicycle as their MAIN mode of transport, due to major initiatives the SDNPA is undertaking, such as resurfacing and/or extending off road cycle paths to major sites in the South Downs.

[2] From 2012 to 2016, the SDNPA has been a partner in the Department for Transport's Local Sustainable Transport Fund programme. The Two National Parks LSTF Partnership has invested in specific behaviour change measures and marketing to encourage use of non-car travel modes including public transport and cycling.

There are marked differences in transport usage dependent upon where in the South Downs National Park people are visiting. Perhaps unsurprisingly, where train and bus services are poor or relatively non-existent in the western side of the National Park, in general 90% or more visitors reported that their main mode of transport was their **car/van/other motor vehicle**. Interestingly, the one outlier in the western part of the SDNP was **Midhurst**; whilst over two thirds of visitors interviewed drove to the area (76%), 13% stated they **walked/were on foot**, as 39% of visitors were local residents (see section 5), this is perhaps unsurprising.

Those locations in the eastern side of the SDNP where 88 or more visitors were interviewed were Beachy Head, Devils Dyke, Lewes, and Seven Sisters. Of particular interest is the finding from **Lewes**, where over a third (34%) travelled to the town by **train**. At **Seven Sisters Country Park**, almost a quarter of visitors interviewed (24%) had travelled to the site by **coach/bus service**.

At **Beachy Head** over one in ten interviewees (12%) stated that their main mode of transport was **walked/on foot**, and at **Devil's Dyke** 15% of the 91 visitors interviewed utilised the **bus/coach service** as their main mode of transportation to the area.

Of the 180 respondents who **also used** another form of transport in addition to their MAIN mode, the most common was **walked/on foot** (79%).

Recommendations:

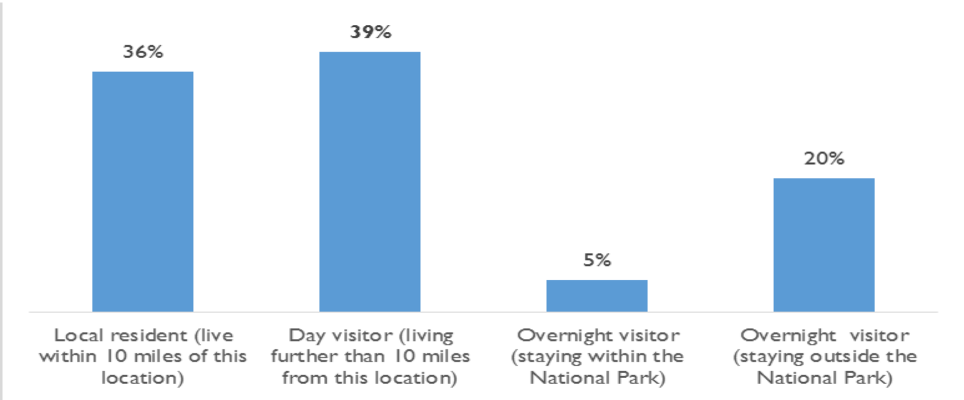
Continue work with bus companies running services to Seven Sisters & Devil's Dyke to try and increase take up. Focusing on these sites in the East already showing an appetite for public transport will have a better chance of initial success.

Key visitor attraction routes in the West such as Chichester to the Weald and Downland Museum or Havant and Petersfield to Queen Elizabeth Country Park are strong areas of opportunity and growth in public transport use in the future. Promoting these routes on attraction websites and branded adverts at point of disembarkation could achieve this.

5. Type of visitor

As with previous years, visitors to the South Downs National Park are predominantly **day visitors or local residents** (75%). Over a third of day visitors (36%) were **local residents**.

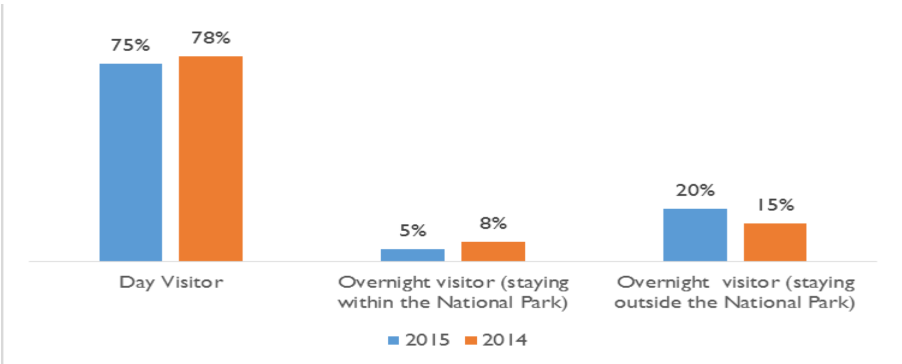
Chart 2. Visitor type



Base: 1,017

When comparing the 2015 survey findings with those from 2014[3], Chart 3 reveals that there has been a very slight *decrease* in the proportion of **overnight visitors staying within the National Park** – from 8% in 2014 to 5% in 2015.

Chart 3. A comparison of visitor type between 2014 and 2015



Base: 1,017 (2015); 1,013 (2014)

[3] Note that the classification of local resident changed very slightly in the 2015 survey. Therefore, we have combined the two categories of day visitor/local resident into one 'day visitor' category for comparison purposes.

Overnight visitors were staying in a variety of locations; most notable of these were **Eastbourne** and **Brighton** where 19% and 15% of respondents respectively were staying.

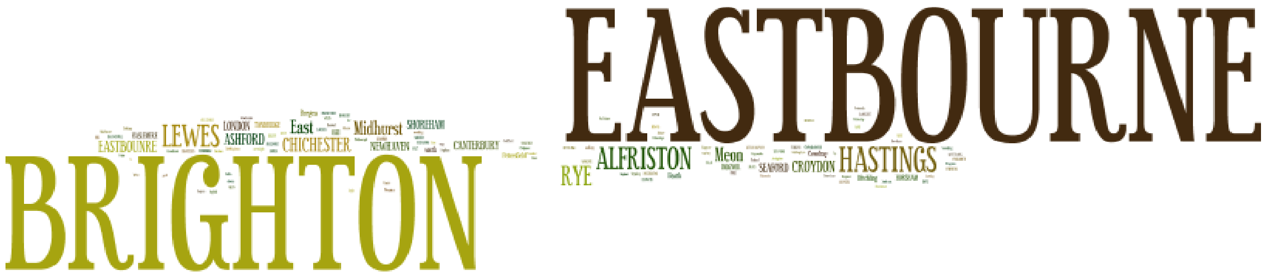


Table 2. Visitor type composition by location

Location	Base	Local Resident	Day Visitor	Overnight (inside NP)	Overnight (outside NP)
Alfriston	61	31%	23%	11%	34%
Alice Holt Forest Park	90	48%	44%	0%	8%
Beachy Head	90	17%	20%	2%	61%
Devil's Dyke	91	**51%**	16%	3%	**30%**
Ditchling Beacon	61	48%	30%	10%	13%
Harting Down	59	31%	54%	14%	2%
Lewes	89	46%	15%	**3%**	36%
Midhurst	88	39%	44%	10%	7%
Old Winchester Hill	89	45%	49%	3%	2%
Pulborough Brooks	60	18%	**72%**	5%	5%
Queen Elizabeth Country Park	88	40%	55%	3%	2%
Seven Sisters Country Park	89	33%	33%	2%	33%
Weald and Downland Museum	59	8%	**71%**	2%	19%

Table 2 above reveals that, at both **Pulborough Brooks** and the **Weald and Dowland Museum,** seven in ten or more respondents were *day visitors* (72% and 71% respectively). . This suggests that these attractions have a strong individual pull with people travelling large distances in a day to reach them. As such it would be extremely beneficial to connect them more strongly with train and bus routes to Pulborough and Chichester respectively, especially in light of the fact that the vast majority of respondents travelled to both sites by **private vehicle.**

Six in ten visitors (61%) to **Beachy Head** were *overnight visitors from outside the national park*. It is likely that many of these were staying nearby in Eastbourne which falls just outside the national park boundary.

Comparison between 2015 and 2014 is unavailable for *day visitors* due a slight change in classification. However, regarding *overnight visitors*, **Lewes** has seen a large decline from 18% of people staying within the national park boundary in 2014 to just 3% in 2015. Although this does seem to have been somewhat accounted for by a rise in *overnight visitors staying outside the national park* from 15% in 2014 to 36% in 2015. **Devils Dyke** also saw a large rise in *overnight visitors staying outside the national park* from 13% in 2014 to 30% in 2015.

Recommendations:

In the next iteration of the survey close attention should be paid to the proportion of those staying inside or outside of the park to see whether the trend in Lewes and other destinations is a true reflection of change or a representation of the small sample size.

6. Length of stay and spend on accommodation

Table 3. below shows that, on average, visitors stayed inside the national park for **4.31** nights. This compares to **5.15 nights** in 2014. This is possibly driven by a *decrease* in average length of stay in paid accomodation from **4.3** days in 2014 to **3.3** in 2015. Length of stay in unpaid accomodation remained largely the same at **6.38** days compared to **6.5** in 2014.

Table 3: Average length of stay (days)

	Paid	Unpaid	Average
Inside the national park	**3.30**	6.38	**4.31**
Outside the national park	5.44	5.75	5.52
Average	5.05	5.90	**5.28**

Of those *staying overnight within the national park*, 67% (33 of 49) were staying in **paid for accommodation**. This compares with 63% in 2014. The average spend per person for those *staying inside the park* is **£34.92,** slightly less than the **£37.66** in 2014 – see table 4 below. Of the eight in ten respondents who were staying *outside the national park, 75%* were staying in *paid accommodation.*

Table 4. Accommodation expenditure per person per night

Spend per night per Person (£)	Overnight (All)	Overnight Inside SDNP	Overnight Outside SDNP
Minimum	3.60	3.60	4.17
Maximum	240.00	125.00	240.00
Average (Mean)	42.63	**34.92**	**44.76**
Base	**138**	**30**	**108**

As can be seen in table 4 above, average spend per night for those staying *outside the national park* is almost **£10** higher than for those staying *inside*. This could be because a higher proportion of those staying outside the park are in hotels, or, there is a discrepancy in accommodation pricing between SDNP and the surrounding area. However, the South

Downs Visitor Accommodation Review[4] found that hotels within the park are usually operating at or above market rates so this may be a discrepancy of the sample data[5].

It is important to note that the maximum amount spent on accommodation by those staying *outside the national park* (£240) is almost double that of those staying inside (£125).

Recommendations:

There may be a perception issue regarding the price of accommodation or the accessibility of key places within the national park. As more visitors stay in paid accommodation outside the national park a programme of action is needed to raise awareness of the range of accommodation available in the national park, as well as the affordability.

It would be beneficial to include an additional question in the next iteration of the visitor survey, probing in more detail the **type of accommodation** people are staying in (for example, campsite, B&B, hotel, etc), in addition to the cost of their accommodation. This would allow us to assess whether the lesser amount spent on accommodation in the national park is due to accommodation usage (e.g. more campers in the national park) or regards accommodation price variance (e.g. hotels within the national park are generally cheaper than those outside). This would also allow us to more ably demonstrate the difference in day expenditure between accommodation types. (It is however important to note that the findings would still need to be treated with an element of caution due to the relatively small base sizes we are achieving for those staying in paid accommodation inside or outside the national park. We might want to undertake some booster sampling of those specific visitor types to ensure our findings are more robust and representative of these visitor groups.).

In the next iteration of the survey, it would also be useful to ask those staying outside the park whether the South Downs National Park was a primary reason for choosing this area to holiday or whether it was something they discovered once here/a nice bonus. If we can show that the National Park is a primary tourist draw of benefit to the surrounding local

[4] The South Downs Visitor Accommodation Review is a supporting evidence document for the emergin South Downs Local plan and is available at https://www.southdowns.gov.uk/planning/planning-policy/national-park-local-plan/evidence-and-supporting-documents/

[5] It should be noted that the results for those staying within the national park are based on a very small sample of only 30 visiting parties.

economies it would be easier to bring organisations, hotels etc on board with campaigns or even to provide some income generation through corporate social responsibility programs.

Irrespective of whether visitors are staying inside the national park or outside, they are more likely to stay for longer periods if they are not paying for their accommodation. Therefore, our target audience for visitors in paid for accommodation within the national park, looks to be those on long weekend / short mid-week breaks.

7. Visitor spend on non-accommodation costs

Visitors were asked to state approximately how much they and their immediate party expected to spend in the SDNP that day, excluding accommodation (which was asked separately). Table 5 shows that the overall mean average expenditure per person was **£9.97**cross all visitor types.

Table 5. Spend per person per day

Spend per person per day	Total	Local resident (live within 10 miles of survey site)	Day visitor (living 10+ miles from survey site)	Overnight visitor (staying within SDNP)	Overnight visitor (staying outside SDNP)
Min	0.00	0.00	0.00	0.00	0.00
Max	116.67	60.00	116.67	50.00	62.50
Average	9.97	6.31	9.26	17.26	16.52
Median	6.67	4.00	6.67	12.92	13.33
Base	**949**	**346**	**377**	**48**	**174**

N.b. One outlier of £266/person/day expenditure was removed due to it being well over double the next highest level of expenditure.

It is important to note that this value is slightly inflated by several big spenders; the highest of which spent £116.67**,** as displayed in the table below. Furthermore, when considering the median average we can see that 50% of respondents spent **£6.67** or less. As we would expect, overnight visitors spent around twice as much as day visitors. There is however little difference in expenditure when comparing those staying inside or outside the national park.

The higher average expenditure of day visitors when compared to local residents could be due to the much larger proportion of local residents travelling on foot or by bike (16.3%) compared to day visitors (1.6%) as well as the increased likelihood of purchasing meals if travelling further afield.

When breaking down spend per person by location (table 6) it is notable that the amount spent by those visiting the more urban areas of Lewes and **Midhurst** was much higher (£19.52 and £14.16 respectively). This is likely to be because of the larger numbers of restaurants and higher charging tourist attractions available, such as Lewes Castle, notably mentioned as a primary reason for visiting the area. Interestingly the presence of a charged car park and café at **Queen Elizabeth Country Park** does not greatly increase expenditure (£4.59) when compared to **Old Winchester Hill** (£4.07) that doesn't have either these facilities.

Table 6. Expenditure per person per day

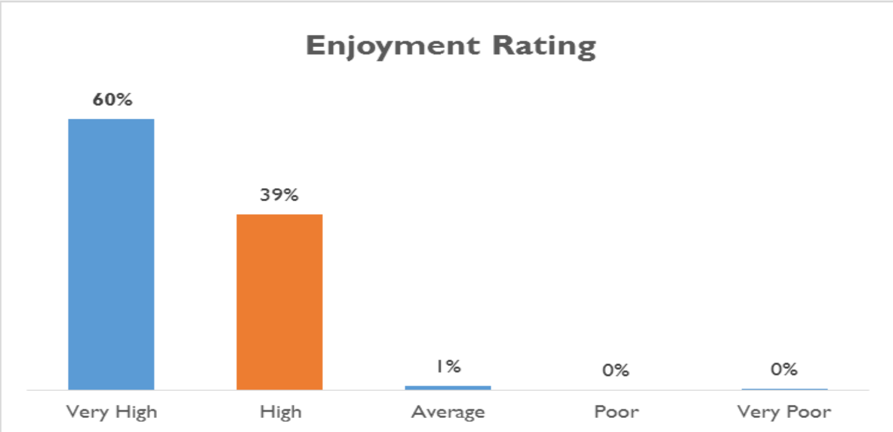
Location	Spend (£)	Base
Devil's Dyke	5.59	91
Alice Holt Forest Park	3.84	90
Old Winchester Hill	4.07	87
Midhurst	**14.16**	86
Lewes	**19.52**	80
Queen Elizabeth Country Park	**4.59**	78

Recommendations:

As would be expected, those staying overnight - both within and outside the national park - are spending more per person. For this reason it would be beneficial to encourage visitors to stay longer either through increased accommodation availability, advertisement or combined travel/accommodation deals. Again, breaking staying visitors into accommodation types, as mention in section 6, would allow us to see which staying visitor type contributes more to the local economy, although a larger base would be required (possibly through booster sampling).

8. What do visitors like to do in the South Downs National Park?

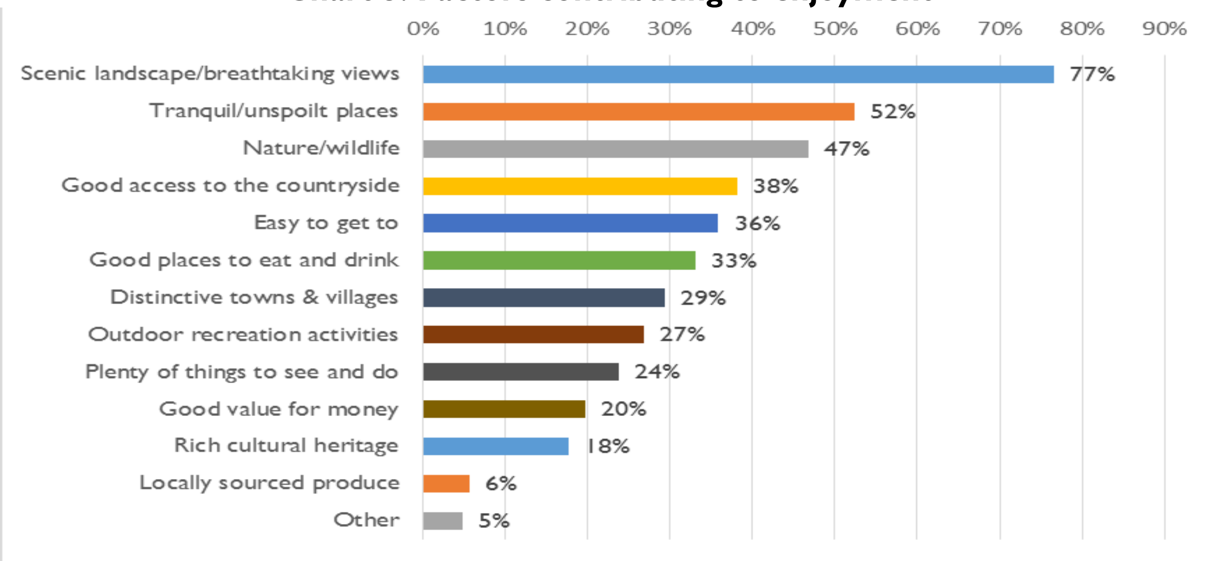
Visitors' **level of enjoyment** of the South Downs National Park is historically high and has remained so in 2015, with 99% of respondents stating it was **very high/high**. This is an increase of 2% from 2014.



Base: 1,003

The factor that *most* contributed to visitors' enjoyment of their visit was **scenic landscape and/or breathtaking views** (77%), followed by **tranquil/unspoilt places** (52%, see chart 5). This is in line with the findings from the 2014 visitor survey and continues to prove that the landscape of the South Downs National Park is a huge draw for people.

Chart 5. Factors contributing to enjoyment

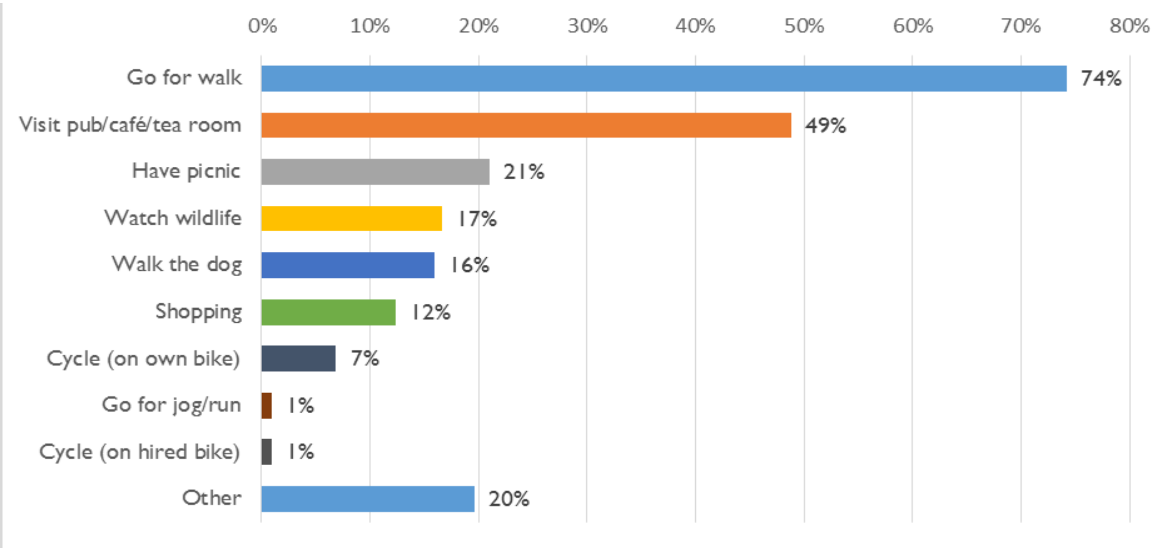


Base (multiple choice question): 1,018

In the main, visitors planned to be outside in the National Park be it **going for a walk** (74%), **having a picnic** (21%), **watching wildlife** (17%), **walking the dog** (16%) or **cycling** on their own or a hired bike (8%), see chart 6.

Refreshments after all that fresh air are also most welcome, with almost half of those interviewed (49%) intending to **visit a pub, café or tea room**.

Chart 6. What do you plan to do here today?



Base (multiple choice question): 1,018

One in five respondents (20%) stated that they were there to participate in an activity not listed above. Four in ten of these visitors (40%) reported that they planned to utilise the **play area**. A further 20% intended to visit a **National Trust property, castle or ruins**.

Recommendations:

Ensure signage, interpretation and maps are of a high standard for walkers, dog walkers and cyclists as the beautiful scenery of the South Downs National Park is the biggest draw for people.

Ensure key sites for wildlife have sufficient interpretation to include details of what wildlife can be seen when as well as potential information for behaviour change (dog walking on heathlands) or visitor giving schemes.

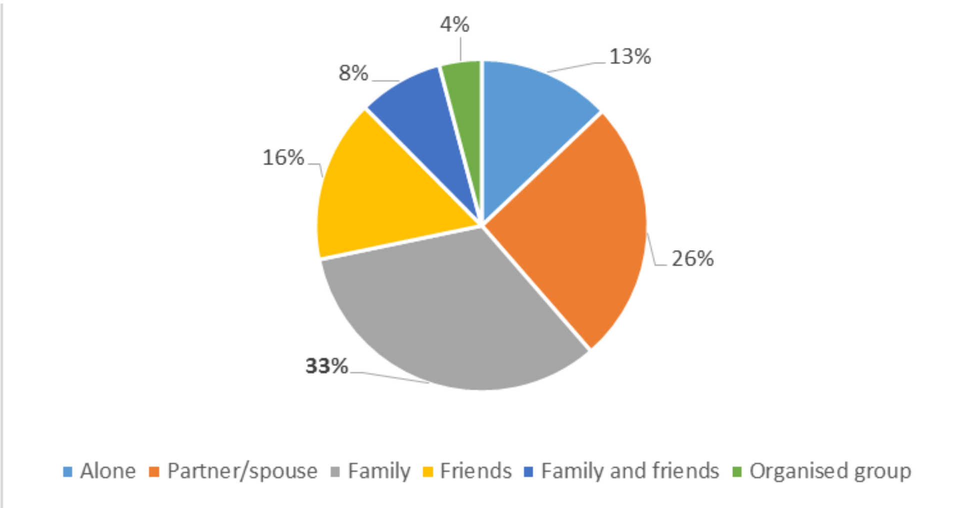
Link in with pubs/cafes/tea rooms to offer deals for those visiting by public transport as this is the second most popular activity and a big draw for visitors to the South Downs National Park.

A number of visitors were taking members of their group to play areas so there is huge potential here for linking in with this – for example free soft drink or ice cream for every child in a party travelling by public transport.

9. Other visitor demographics

A third of respondents visited with **family** (33%). This is reasonably consistent with 2014 (35%). A smaller proportion than in 2014 were accompanied by a **spouse/partner** (26% compared to 32% in 2014).

Chart 7. Who visiting with



Base: 1017

In 2014, the average party size was 2.9 people. This has slightly increased in 2015 to **3.1** members.

Table 7 below reveals that children account for two in ten members of a group (21%) and adults 79%. A higher proportion of females make up group composition.

Table 7. Visitor group profile by gender

	Male		Female		ALL	
	Number	%	Number	%	Total	%
Adults	1090	34.7%	1392	44.3%	2482	79.1%
Children	325	10.4%	332	10.6%	657	20.9%
Total	**1415**	**45.1%**	**1724**	**54.9%**	**3139**	**100%**

As illustrated in the table 8, there was a reasonably even split amongst all age groups – particularly those in the 'young family' age group categories up to 44 years (55% of all members of a party); the exception being in the 16-24 age category (just 9% of visitors in a party – this was 10% in 2014).

Table 8. Visitor group profile by age

	Under 16 years	16-24 years	25-34 years	35-44 years	45-59 years	60-69 years	70+ years	Total
Male	325	122	131	189	229	232	187	1415
Female	332	161	215	252	265	299	200	1724
Total	**657 *(21%)***	**283 *(9%)***	**346 *(11%)***	**441 *(14%)***	**494 *(16%)***	**531 *(17%)***	**387 *(12%)***	**3139 *(100%)***

Recommendations:

Target marketing at family groups. Affordability and convenience will be the biggest draws.

There is strong potential to increase numbers of 16-24 year olds through ties with the upcoming youth mosaic project.