South Downs National Park Authority

Visitor Survey 2018

Final report

March 2019

Author

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Contents

1. Key findings and recommendations

- At <u>Blackdown</u>, a new site for this survey, 85% of respondents were **local residents**, 30% more than any other site and almost ten times the proportion seen at <u>Seven Sisters Country Park</u> (9%)

- <u>Eastbourne</u> (53), <u>Brighton</u> (39), <u>Lewes</u> (20) and <u>Alfriston</u> (11), attracted the most overnight visitors

- Eight in ten respondents (82%) noted that they were **aware of being inside the South Downs National Park**

- **28%** indicated that the National Park had been a factor in their **decision to visit the area.** Although this rose as high as **60%** for Overnight visitors staying in the park

- **AirBnB / Homestay** made up **23%** of the accommodation use of *all paid overnight visitors*, second only to **Hotels** at **32%**

- The overall **average length of stay** of overnight visitors has *dropped* from **5.28** nights in 2015 to **4.66** in 2018

- Median expenditure on non-accommodation costs remained static at **£6.67.** Although increased maximum expenditure meant the mean rose to **£12.31** from **£9.97**

- Respondents rating their **overall level of enjoyment** as **very high** rose from **60%** to **64%** in 2018

- **Scenic landscape &/or breath-taking views** retained its top spot for the most mentioned contributing factor for enjoyment at 77%

- **Queen Elizabeth Country Park** has seen a very positive shift in people accessing the site by **Bicycle**, increasing almost **7%** from **4.5%** in 2015 to **11.25%** in 2018

- Representation of **16-24 year olds**, already the most unrepresented age group, has decreased by more than half, falling from **9%** in 2015 to **4%**

- **Germany, USA, Australia** and **Holland** accounted for **50%** of our overseas visitors

2.   Introduction

This report outlines the findings from the fourth South Downs National Park (SDNP) visitor survey. Previous surveys were undertaken in 2015, 2014 and 2011. Where possible, comparisons will be made to previous years data.

In July 2018 Tourism South East (TSE) were commissioned by the South Downs National Park Authority (SDNPA) to undertake the field work component of the survey. 1,193 10 minute face to face interviews were completed with visitors at 16 sites across the national park between July and September 2018.

Four new sites were surveyed: Blackdown, Arundel, Winchester City Mill, and Petworth. The Weald and Downland Museum was removed as a survey site, the reason being to get a better geographic distribution as well as a better representation of the urban environment. Table 1 below shows the distribution of the interviews across the survey sites as well as comparison to the previous survey in 2015.

Table 1. Interviews achieved by site

Survey Site	No. interviews achieved
Devil's Dyke	92
Lewes	92
Alice Holt Country Park	80
Arundel	80
Blackdown	80
Midhurst	80
Old Winchester Hill	80
Queen Elizabeth Country Park	80
Seven Sisters Country Park	80
Pulborough Brooks	79
Beachy Head	72
Alfriston	60
Ditchling Beacon	60
Harting Down	60
Petworth	59
Winchester City Mill	59
Total	**1193**

A number of other changes were made to the survey with several new questions added. A majority of previous questions were retained in their original format to allow for comparisons with historical data. The key question differences between the 2018 and the 2015 survey were as follows:

- Addition of a section on awareness of the national park, frequency of visit to the area and whether the designation was a factor in their decision to visit the area
- New closed question on accommodation type
- Additional options on activities to be undertaken by visitors
- New closed question on resources used to plan a visit
- New open question on what improvements could be made to increase visitor satisfaction
- Edited gender options to include Non-binary / Third gender to bring the survey in line with best practice and ensure full representation was available to respondents
- New questions on disability and ethnicity were added to provide a more detailed profile of our visitors
- All demographic questions were moved to the end of the questionnaire to improve flow and bring in line with best practice[1].

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[1] See Appendix 1 for the 2018 survey questionnaire

3.   Visitor Type

There has been little to no change in the overall visitor type when compared with the previous visitor surveys – see chart 1 which compares the results for the 2018 and 2015 surveys. **Day visitors** continue to make up the largest proportion of our visitors (39% in both 2018 and 2015) and **overnight visitors staying within the park** the smallest, although with a small growth from 5% to 6% between 2015 and 2018.

Chart 1. Visitor type
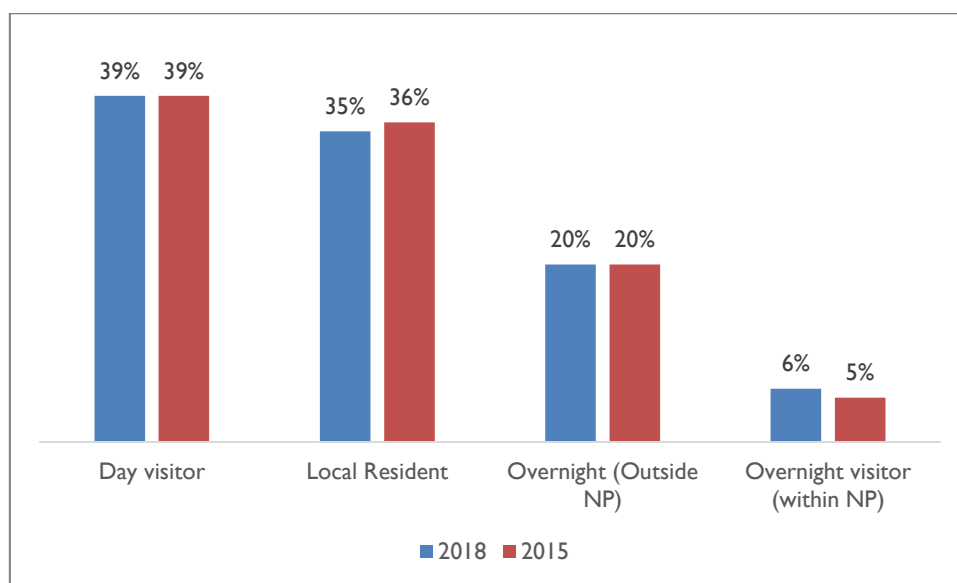
Base: 1193

There was however a large amount of variation in visitor profile when comparing locations – see Table 2 below. At Blackdown, a new site for this survey, 85% of respondents were **local residents**, 30% more than any other site and almost ten times the proportion seen at Seven Sisters Country Park (9%). Blackdown is popular and well used but this low proportion of external visitors may be a cause for action, especially for a site that is two miles from a major 'park gateway' (Haslemere Station) and on a promoted long distance route (Serpents Trail).

Recommendation 1: Consider how we can increase the promotion of Blackdown as a destination for non-local residents

Alfriston and Lewes had the highest proportion (17%) of **overnight visitors staying within the NP**. At both sites a majority of respondents were staying within the respective towns. Over half of respondents (54%) at Seven Sisters Country Park were **overnight visitors staying outside the NP** with a majority staying in either Brighton or Eastbourne. In contrast the 51% of **overnight visitors staying outside the NP** at Arundel were staying at multiple locations across the south coast.

Table 2. Visitor type by survey site

Location	Day visitor	Local Resident	Overnight (Outside NP)	Overnight (within NP)	Base
Alfriston	52%	17%	15%	**17%**	60
Alice Holt Country Park	40%	56%	3%	1%	80
Arundel	26%	18%	51%	5%	80
Beachy Head	39%	13%	47%	1%	72
Blackdown	14%	**85%**	1%	0%	80
Devil's Dyke	35%	45%	20%	1%	92
Ditchling Beacon	23%	47%	18%	12%	60
Harting Down	42%	45%	7%	7%	60
Lewes	35%	14%	34%	**17%**	92
Midhurst	43%	36%	14%	8%	80
Old Winchester Hill	48%	48%	3%	3%	80
Petworth	**66%**	17%	10%	7%	59
Pulborough Brooks	**67%**	24%	5%	4%	79
Queen Elizabeth Country Park	46%	39%	8%	8%	80
Seven Sisters Country Park	30%	**9%**	**54%**	8%	80
Winchester City Mill	34%	41%	20%	5%	59
All	**39%**	**35%**	**20%**	**6%**	**1193**
Base	*471*	*413*	*235*	*74*	

Of the 304 **overnight visitors** staying within and outside the National Park, 108 different locations were mentioned. <u>Eastbourne</u> (53), <u>Brighton</u> (39), <u>Lewes</u> (20) and <u>Alfriston</u> (11) were the most noted locations with all others attracting less than ten mentions.

4.   Awareness and influence of the national park designation

4.1   Awareness of the National Park

This section was a new addition in the 2018 survey, and as such has no historic comparison. The question was phrased as to whether the respondents were aware they **'were in'** the South Downs National Park. For this reason we must discount responses from Winchester City Mill and Arundel as, although gateways, the questionnaire sites aren't within the park boundary.

Chart 2. Awareness of the South Downs National Park
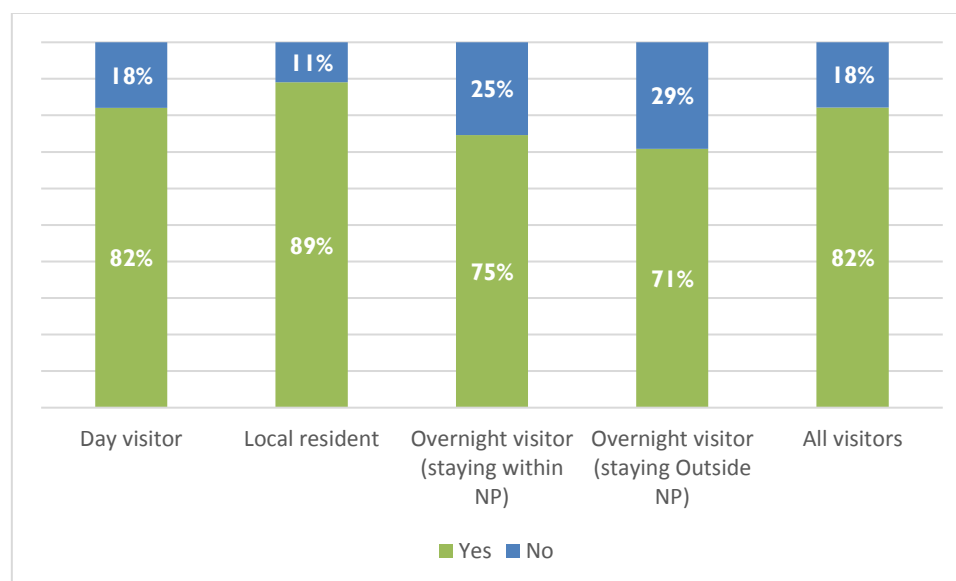
Base: 1193

As shown in Chart 2 above over eight in ten respondents (82%) noted that they were **aware of being inside the South Downs National Park.** This is a very strong result, however, the leading nature of the question may have caused false positives. This should be considered for any future surveys.

> **Recommendation 2:** Research team to consider the wording of the awareness question to make it less leading. In addition consider the routing of the questionnaire for sites on or outside the boundary

As expected local residents were **most aware of the designation.** Overnight visitors were least likely to know of the designation - continued work alongside accommodation providers in and around the park to provide information on the National Park could move to resolve this gap.

Level of awareness was less consistent across visitor type. There was a large amount of variation by survey site with only **41%** of visitors at Alice Holt Country Park **aware of the designation** rising to a high of **98%** at Harting Down.

> **Recommendation 3:** Tourism lead to work with accommodation providers to raise awareness of the South Downs National Park designation

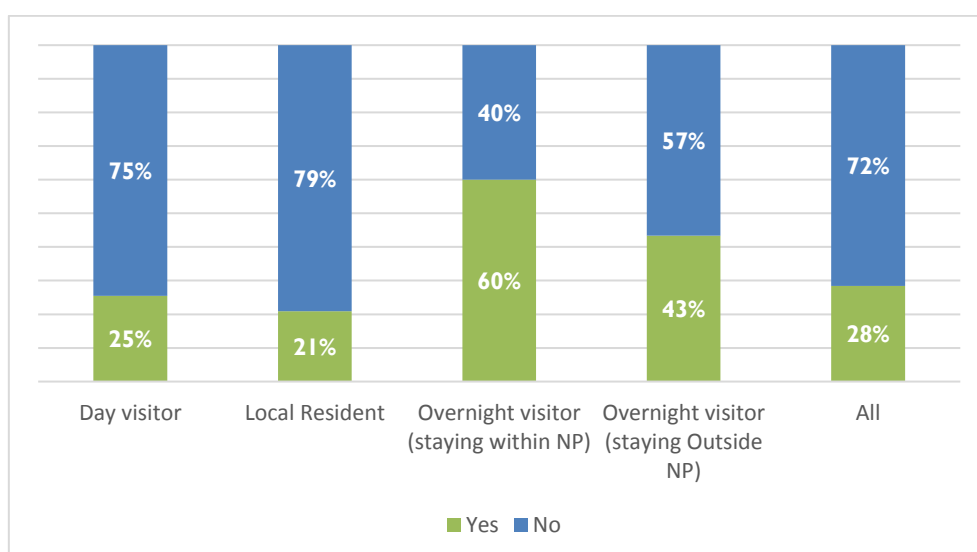## 4.2   Designation as a factor in decision making

Of the respondents who were aware of the designation (866 people), only **28%** indicated that the National Park had been a factor in their **decision to visit the area**. There was a lot of variation amongst the survey sites. At <u>Alice Holt</u> only **6%** (2 people) stated that the designation had been a factor; in contrast at <u>Ditchling Beacon</u> and <u>Seven Sisters Country Park</u> it was **65%** and **63%** respectively.

Table 3. Designation as a factor in decision making by survey site

Location	No	Yes	Base
Alfriston	63%	37%	51
Alice Holt Country Park	94%	**6%**	33
Beachy Head	48%	52%	63
Blackdown	85%	15%	73
Devil's Dyke	60%	40%	75
Ditchling Beacon	35%	**65%**	52
Harting Down	80%	20%	59
Lewes	80%	20%	61
Midhurst	91%	9%	70
Old Winchester Hill	77%	23%	75
Petworth	88%	12%	43
Pulborough Brooks	86%	14%	72
Queen Elizabeth Country Park	80%	20%	76
Seven Sisters Country Park	37%	**63%**	63
All	**72%**	**28%**	**866**

When split by visitor type we can see that the designation is a much larger factor with more traditional tourists. An impressive **60%** of <u>overnight visitors staying in the park</u> stated that the designation *was a factor* in their decision to come to the area.

Chart 3. Designation as a factor in decision making by visitor type

	Day visitor	Local Resident	Overnight visitor (staying within NP)	Overnight visitor (staying Outside NP)	All
No	75%	79%	40%	57%	72%
Yes	25%	21%	60%	43%	28%

Yes ■ No ■

Many of the survey sites are popular, long standing tourist destinations and comparatively the National Park is still very young, having only been designated in 2010. Combined with the high proportion of local residents, this likely contributes to the recorded unimportance of the designation in decision making. Without an adjustment in these factors, such as a larger proportion of overnight visitors, positive movement in this indicator overall may be limited.

The development of the SDNP as an experiential tourism destination in its own right through initiatives such as the English National Park Collection with Visit England will likely lead to a positive movement in this indicator.

In addition, the increased integration of these popular sites and the visitor experience through the continued roll out of the visual identity and the forthcoming entry road signs will likely lead to a stronger recognition of place.

4.3   Regularity of visits

Another new question in the 2018 survey asked <u>respondents how often they had visited the area over the past 12 months</u>. Of the 1,193 respondents, **75% were repeat visitors**. This is unsurprising given the proportion of respondents who were day visitors or local residents.

As would be expected, <u>local residents</u> visit the *most regularly* with 43% of respondents visiting either **once a week** or **more than once a week**. <u>Overnight visitors both within and outside National Park</u> were more likely to be **visiting only once per year or less**.

Recommendation 4: Research and Evidence Officer to consider ordering and wording of repeat visit question to remove ambiguity regarding repeat visits. I.e. a repeat visit within week does not count if it is within the same "trip"

5. Accommodation type and spend

5.1 Paid vs Unpaid

There was a slight increase of **2%** between 2015 and 2018 in the proportion of **overnight visitors staying in paid accommodation**. However, when split by whether inside or outside the park there is a bigger discrepancy. Visitors staying **outside the park** in paid accommodation fell slightly in 2018 while overnight visitors **within the park** staying in paid accommodation increased by **14% (**from 67% to 81%)**.** Note however the small base size for overnight visitors within the park which will allow for larger fluctuations with smaller movements, and hence why this large increase only resulted in a relatively small movement in the overall figure.

Table 4. Paid vs Unpaid accommodation

	2018			2015		
	Paid	**Unpaid**	*Base*	**Paid**	**Unpaid**	*Base*
Within NP	**81%**	19%	*73*	**67%**	33%	*49*
Outside NP	73%	27%	*235*	74%	26%	*203*
All Overnight	**75%**	25%	*308*	73%	27%	*252*

5.2 Accommodation type

In this survey we added an additional question regarding 'accommodation type' to add more useful context to the survey results. This included all traditional forms of accommodation as well as sharing economy accommodation providers AirBnB and Homestay[2].

AirBnB / Homestay made up **23%** of the accommodation use of *all paid overnight visitors*, second only to **Hotels** at **32%** - see chart 5 below. There is a significant drop in hotel market share when comparing those staying outside the National Park to those staying inside, **37%** and **20%** respectively. This is likely to be largely due to the type of bed space available in these areas. When considering accommodation within the National Park only, **AirBnB / Homestay** had the *largest market share* (**23%**).

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[2] It is important to note that there are some caveats with regards to the definition of AirBnB. Although primarily a facility for private individuals to rent out their rooms or homes; traditional B&Bs and other accommodation providers can also use this platform.

Chart 5. Paid accommodation type

Legend: ■ AirBnB / Homestay ■ Glamping ■ B&B ■ Camping ■ Caravan ■ Hotel ■ Pub/Inn
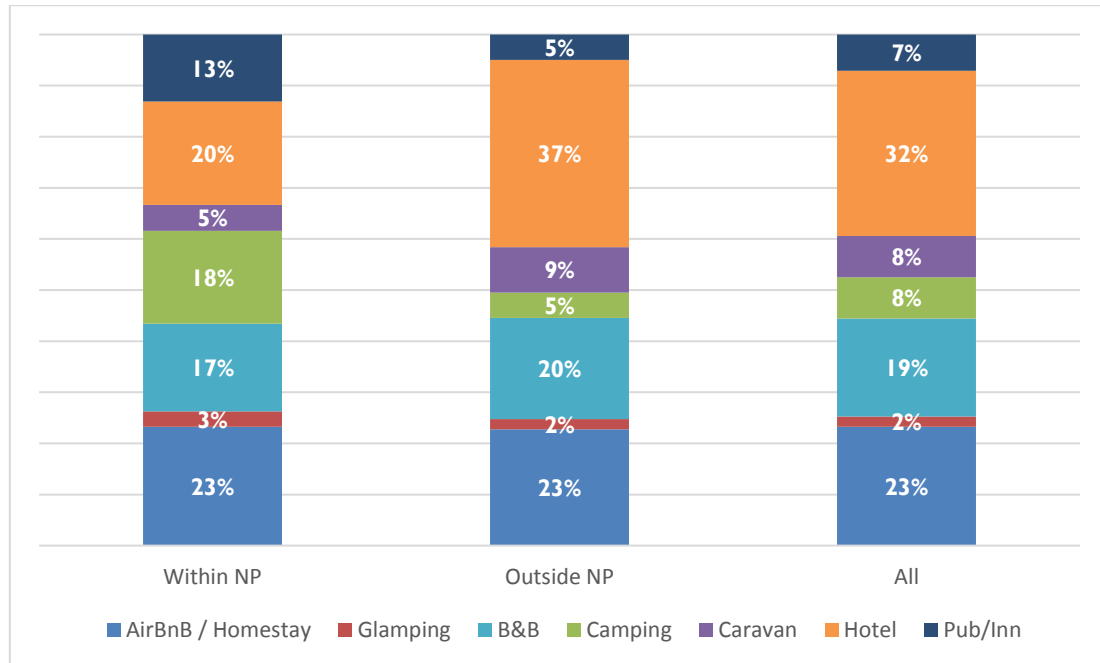
Base: 228

5.3 Length of stay

The overall **average length of stay** of overnight visitors has *dropped* slightly from **5.28** nights in 2015 to **4.66** in 2018 – see table 5 below. This fall is almost wholly driven by the reduction in the average number of nights respondents stayed in paid for accommodation *outside of the National Park* with a reduction from **5.44** nights in 2015 to **4.55** in 2018. There was little change between 2015 and 2018 in the average number of nights respondents stayed in <u>unpaid accommodation</u>, although there was a slight increase in unpaid accommodation within the National Park

Table 5. Average length of stay by whether in paid or unpaid accommodation

	Paid		Unpaid		Average	
	2018	2015	2018	2015	2018	2015
Within NP	3.32	3.30	7.62	6.38	4.10	4.31
Outside NP	4.55	5.44	5.61	5.75	4.84	5.52
Average	4.23	5.05	5.95	5.90	4.66	5.28

As can be seen in Table 6 below, **caravans** had the highest average length of stay at **6.5** days, whereas **pubs/inns** had the lowest average length of stay at **1.69** days.

Table 6. Average length of stay by accommodation type

	AirBnB / Homestay	B&B	Camping	Caravan	Glamping	Hotel	Pub/Inn
Within NP	5.00	2.90	1.91	**9.00**	4.50	2.67	1.63
Outside NP	6.15	3.59	5.50	6.00	3.00	4.02	1.75
All	**5.87**	3.43	3.42	**6.50**	3.60	3.80	**1.69**
Base	*53*	*44*	*19*	*18*	*4*	*74*	*16*

AirBnB / Homestay also has a higher average length of stay than all other brick and mortar accommodation. When you combine this with its high market share this provision could be making up a significant proportion of occupied bed spaces.

5.4 Accommodation spend

Table 7 Cost of accommodation by year

£/p/n	All Accomodation	
	2018	**2015**
Outside NP	39.13	44.76
Within NP	42.19	34.92
All Overnight	39.91	42.63

The average cost per person per night of accommodation has reduced from **£42.63** in 2015 to **£39.91** in 2018 – see table 7 above. This is largely caused by a significant decrease in the average spend on accommodation outside the National Park. This does however mask an *increase* in the average spend on accommodation **within the National Park** from **£34.92** in **2015** to **£42.19** in **2018**. This may be a sign of a lack of affordable options within the park

Table 8 Cost of accommodation by type

£/p/n	AirBnB / Homestay	B&B	Hotel	Pub/Inn	Camping	Caravan	Glamping
Outside NP	33.65	44.32	50.66	32.94	8.66	15.09	31.28
Within NP	45.31	47.44	60.63	64.44	9.00	8.83	15.00
All Overnight	**36.57**	45.03	52.27	48.69	8.85	14.05	27.21
Base	*53*	*44*	*74*	*16*	*19*	*18*	*4*

When we look at the *cost of accommodation split by accommodation type* - see table 8 – **Camping, Caravan** and **Glamping** are the cheapest accommodation types **AirBnB / Homestay** produces the <u>lowest average £/person/night</u> of any brick and mortar accommodation. It is important to note that the bases here, especially when considering the split by accommodation type are very small.

<u>**A note on AirBnB / Homestay**</u>

The use and prevalence of peer to peer accommodation has rapidly expanded over the past few years (Barron et al 2018) moving from a predominantly urban, early adopter tool to a mainstream source of accommodation. This trend is set to continue. It is important that the SDNPA understand and keep ahead of this emerging market, not only for its opportunities in providing much needed bed spaces within the park but also through potential risks such as the loss of rental and housing stock, as seen in Barcelona, New York and beyond (Wachsmuth et al 2018). This occurs when this tool moves from a majority 'owner occupiers', renting their spare rooms, unlocking spare redundant capacity, to landlords opting for lucrative short term lets over traditional rental tenants. There is also potential for AirBnB to increase the tourist concentration of an area causing strain on infrastructure (Martin et al 2018).

6.   Visitor spend on non-accommodation costs

The average expenditure per person on non-accommodation costs has *increased* from **£9.97** in 2015 to **£12.31** in 2018. However, this average increase seems to be from a larger number of outliers or 'big spenders', as median expenditure has remained static at **£6.67** – see table 9 below.

In the 2018 survey there were 19 records of expenditure of £75/person or above across all four visitor types. This is a large increase on 2015 where there were only two, both of whom were day visitors. All other visitor types in 2015 had a maximum of £62 or less.

Table 9: Average spend by type of visitor

Spend per person per day	Local Resident		Day visitor		Overnight visitor (staying within NP)		Overnight visitor (staying Outside NP)		Total	
	2018	2015	2018	2015	2018	2015	2018	2015	2018	2015
Max	100.00	60.00	200.00	116.67	125.00	50.00	250.00	62.50	250.00	116.67
Average	5.97	6.31	12.50	9.26	24.24	17.26	18.72	16.52	12.31	9.97
Median	2.50	4.00	8.75	6.67	15.00	12.92	10.75	13.33	6.67	6.67
Base	358	346	425	377	68	48	214	174	1065	949

Recommendation 5 Research and Evidence Officer to consider how we might capture expenditure by item to better understand what money is being spent on

7. Visitor enjoyment and influencing factors

7.1 Overall enjoyment

There was a very slight drop in the proportion of respondents rating their enjoyment as **very high/high**, from 99% in 2015 to 98% in 2018. However, this masks an increase in overall levels of enjoyment as the proportion of respondents rating their enjoyment as **very high** *increased* from 60% in 2015 to 64% in 2018.

Chart 6: level of overall enjoyment
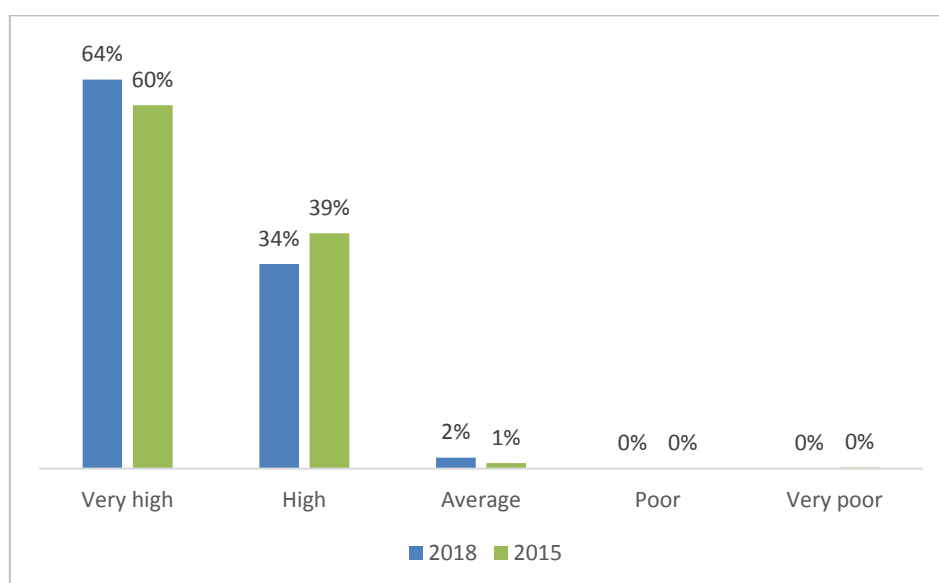
Base: 1193

7.2 Factors contributing to enjoyment

Scenic landscape &/or breath-taking views retained its top spot as the factor most likely to contribute to enjoyment, with over three quarters of respondents (77%) choosing this option. **Nature/wildlife** saw the largest growth in mentions (+10% to 57%) rising to second with **tranquil/unspoilt places** remaining static at 52% and dropping to third. Other big gains were seen in **easy to get to** and **rich cultural heritage** with 9% and 7% rises respectively – see table 10 overleaf. **Outdoor recreation activities** saw a drop of 4% while **Good value for money** fell 8% (from 20% to 12%).

Table 10: Factors contributing to enjoyment

Factor of enjoyment	% in 2018	% in 2015	% change	Pos 2018	Pos 2015	
Scenic landscape &/or breathtaking views	77%	77%	0%	1	1	▬
Nature/wildlife	57%	47%	10%	2	3	▲
Tranquil/unspoilt places	52%	52%	0%	3	2	▼
Easy to get to	45%	36%	9%	4	5	▲
Good access to the countryside	40%	38%	2%	5	4	▼
Good places to eat and drink	34%	33%	1%	6	6	▬
Distinctive towns & villages	27%	29%	-2%	7	7	▬
Plenty of things to see and do	27%	24%	3%	8	9	▲
Rich cultural heritage	25%	18%	7%	9	11	▲
Outdoor recreation activities	23%	27%	-4%	10	8	▼
Good value for money	12%	20%	-8%	11	10	▼
Other (please specify below)	11%	5%	6%	12	13	▲
Availability of locally sourced produce	8%	6%	2%	13	12	▼

'Other' factors mentioned that contributed to respondents' enjoyment included **walking/cycling routes** (22 people). There were a large number who noted the availability of a **playground** (37), the vast majority of whom were visiting Alice Holt.

7.3 What could have made the day more enjoyable

This is the first year where respondents were asked **what factors, if any, would have made their day more enjoyable**. Only a quarter of respondents (25%) felt that any improvements needed to be made to enhance their enjoyment.

The majority of these improvements were site based, as follows:

-   Visitors to Ditchling Beacon were predominantly concerned with a lack of facilities, commenting that the presence of **toilets** (15 people), **a café** (13 people) or a **water tap** (7 people) would have made their day more enjoyable.
-   The presence of **dog faeces** was noted by 12 visitors to Blackdown as a factor affecting their enjoyment
-   **Traffic** was a key issue for 13 visitors to Alfriston; a known hotspot.

Recommendation 6 Rangers and/or site owners of relevant sites to see what practicable actions can be taken to address negative contributors to enjoyment

Some factors were noted across several locations; for example required improvements in **parking** was noted multiple times (57) across 11 of the 16 sites and *was the most noted single issue*. The need for clearer **directions to the site** and **information once on the site** were also mentioned across the majority of survey locations.

7.4   Activities undertaken

When asked **what activities they were planning to undertake on their visit**, those planning to go **shopping** saw the largest increase (6%) from 2015 – see table 11 below. However, this is likely due to the introduction of more urban survey sites, such as Arundel and Winchester which are able to provide these opportunities for visitors. Surprisingly, despite the increase in **wildlife/nature** as a factor contributing to enjoyment, **wildlife watching** as an activity fell by **2%** in 2018. Visitors seem to be swapping wheels for feet with the drop in **cycling** (-2%) picked up by those going for a **jog/run** (+2% between 2015 and 2018). Both of these activities do still however remain low with just 5% and 3% of visitors, respectively, intending to undertake these activities during their visit.

Table 11 Comparison of activities undertaken

Activity	2018	2015	% Change
Go for a walk	73%	74%	-1%
Visit cafe/pub/tea room	50%	49%	1%
Shopping	18%	12%	6%
Visit a historic house or gardens	16%	-	-
Walk the dog	15%	16%	-1%
Watch wildlife	15%	17%	-2%
Have a picnic	14%	21%	-7%
Visit a museum or gallery	6%	-	-
Cycle (on my own bike)	5%	7%	-2%
Go for a jog/run	3%	1%	2%
Cycle (on a hired bike)	1%	1%	0%
Other	17%	20%	-3%
base	1193	1020	

Amongst those who mentioned <u>other</u> activities, 36% stated that they were there to **visit the play park**; the vast majority of whom were from the <u>Alice Holt</u> survey site. This potentially suggests that the interviewer may be poorly positioned at this site. For 22 respondents, they undertook an **alternative outdoor activity**, 8 of which were **hang gliding** or **paragliding**. **Horse riding** only received a single mention.

Recommendation 7 Research team to review the inclusion of Alice Holt as a survey site or the placement of the interviewer on this site to better capture visitors
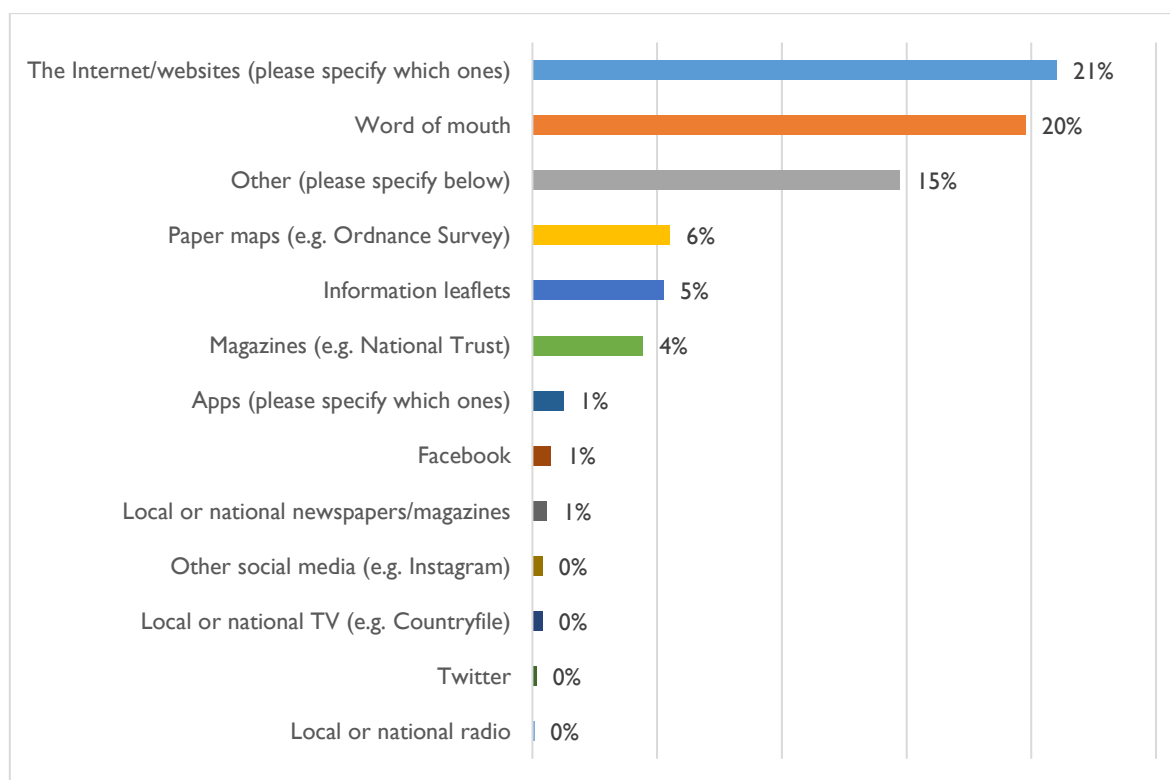
8.   Resources visitors used to plan their trip

One in two visitors reported that they *had not* **used any resources to plan their visit** that day. This is likely to be because of the high number of local residents and repeat visitors to the area. This is further supported when we consider that **71%** of the **176** visitors using **other** resources either had prior knowledge of the location, had been before, or were/had resided in the area.

Chart 7 below shows that **21%** of people used the **internet** to plan their visit, with **word of mouth** only just behind on **19.8%. Leaflets**, **paper maps** and **magazines** all followed with between 4% and 6% **of respondents using those resources**. Few (just 1%) used **apps** or **social media**. This would suggest that we should continue to utilise traditional hard copy formats to inform visitors[3], however, the cost and environmental considerations of these formats may not be worth it when considering this is still only a small section of the market.

> **Recommendation 8** Continue to utilise traditional hard copy formats to inform visitors, however, the cost and environmental considerations of these formats may not be worth it when considering this is still only a small section of the market

Chart 7: Resources used to plan trip/that influenced decision to visit

Resource	Percentage
The Internet/websites (please specify which ones)	21%
Word of mouth	20%
Other (please specify below)	15%
Paper maps (e.g. Ordnance Survey)	6%
Information leaflets	5%
Magazines (e.g. National Trust)	4%
Apps (please specify which ones)	1%
Facebook	1%
Local or national newspapers/magazines	1%
Other social media (e.g. Instagram)	0%
Local or national TV (e.g. Countryfile)	0%
Twitter	0%
Local or national radio	0%

Base: 889

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[3] This is supported by findings from the recent citizens panel survey in Spring 2018 where 71% of people used word of mouth when planning what to do in their free time, and 53% used leaflets.

Those who had used the internet to plan their visit were asked to state which websites they had used. Unsurprisingly **Google** came out a clear top (35% of those who had used the internet) – see table 12 below. The **National Trust, Forestry Commission** and **RSPB** websites also featured, this is likely due to the fact that between them they own a large number of the survey sites.

Recommendation 9 Due to the high use of partner websites such as FC, RSPB, and NT use South Downs shared identity on sites within the park. Consider best way to utilise trip advisor

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The South Downs National Park website was the third most used website. **Trip Advisor** was the only more traditional 'travel' website to be mentioned numerous times, suggesting that were we were to consider promoting the SDNP on a travel website this would be the best option. A further 35 websites were mentioned but only by one or two people, a number of local authority websites were included showing potential for further partnerships with these sites – see Appendix 3 for the full list of websites named.

Table 12: Websites used to plan a visit

| Website used	No.
Google	89
National Trust	23
South Downs National Park	20
Forestry Commission	17
RSPB	16
Trip Advisor	13

Recommendation 10 Research and Evidence Officer to revise 'none of these' to 'none' in this question as alternative resources are captured in 'other'

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9.   Mode of transport

There are only slight variations in the main mode of transport used by visitors since the 2015 survey as shown in chart 8. **Private car** use and **rented motor vehicle** unfortunately both increased by **1%**, however, there was some positive with **walking** increasing by **2%**. These increases came at the expense of public transport use with **Bus/Coach** and **Train** seeing reductions of **1%** and **2%** respectively.

Chart 8. Mode of Transport
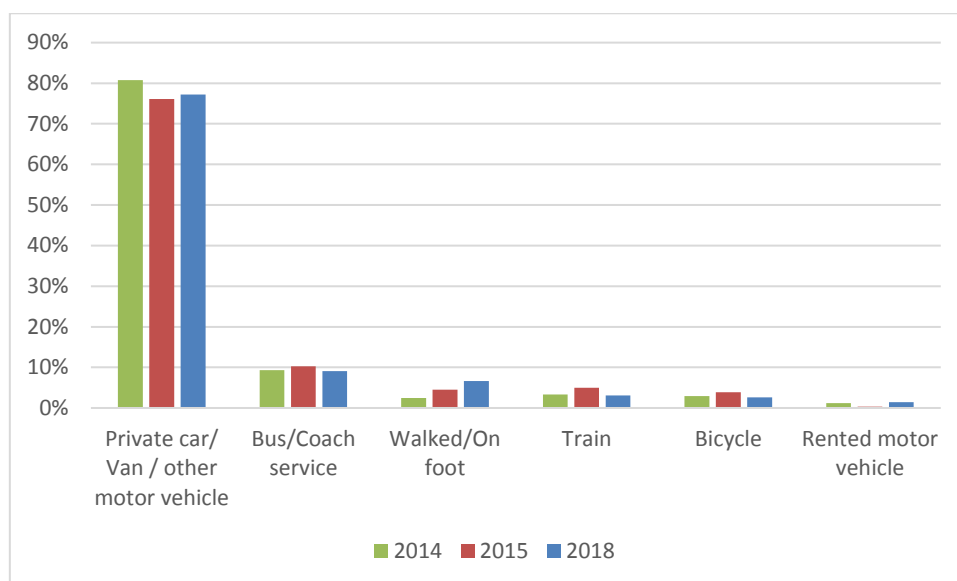
Base: 1193

Although the main mode of transport is fairly static at park level, this is not the case when we look at individual sites:-

Despite the overall negative trend, **Queen Elizabeth Country Park** has seen a very positive shift in people accessing the site by **Bicycle**, increasing almost **7%** from **4.5%** in 2015 to **11.25%** in 2018. This follows the completion of a multi-use path from Petersfield to QECP. As awareness of the new path continues to increase we could expect to see a continuation of this trend which will be measured in the 2021 survey.

As is to be expected the urban survey sites account for much of the public transport use with the rural sites **Alice Holt, Blackdown, Harting Down, Queen Elizabeth Country Park** not attracting a single journey. The notable exceptions is **Seven Sisters** which had the highest proportion (45%) of visitors using **bus or train** as their main mode of transport.

10. Visitor demographics

Comparisons to 2015 are slightly limited as we have made two adjustments to this section to bring it in line with industry best practice, as well as the addition of new survey sites. The changes include the addition of **non-binary/third gender** as a gender option and a re-banding of the age brackets.

There was a decline in the **average group size** from **3.1** in 2015 to **2.5** in 2018. The average group size tends to be smaller at the urban sites with Alfriston (1.8), Lewes (1.9) and Winchester (1.9) taking the three lowest group averages.

9.1 Age and Gender

The overall ratio of Male to Female has remained static, however there was a notable decline in the proportion of **female children** from **10.6%** in 2015 to **8.4%** in 2018. Over eight in ten visitors were adults (81.2%).

Table 13. Group make up by gender

	Male		Female		Non-binary/Third gender		All	
	Number	%	Number	%	Number	%	Total	%
Adults	1035	34.9%	1361	45.9%	10	0.4%	2406	81.2%
Children	310	10.5%	248	8.4%	0	0.0%	558	18.8%
Total	**1345**	**45.4%**	**1609**	**54.3%**	**10**	**0.3%**	**2964**	

Table 14 reveals there was a decline in all age groups **up to the age of 45.** Most worryingly the proportion of visitors in the **16-24 bracket**, already the most unrepresented age group, has over halved falling from **9%** in 2015 to **4%** in 2018.

Table 14. Comparison of visitor age

Age	% in 2018	% in 2015	% Change
Under16	19%	21%	-2%
16-24	4%	9%	-5%
25-34	10%	11%	-1%
35-44	12%	14%	-2%
45+	55%	45%	10%

Recommendation 11 Learning, Outreach and Volunteering Lead to consider implications of the drop in youth representation in visitor demographic

9.2 Ethnicity

This was the first year we have collected the ethnicity of visitors, as such there is no baseline to compare to. As shown in table 15 **86%** of respondents were **White British** and a further **10.4% White Other**. Representation in the **Black ethnic groups** is extremely low with only a single respondent.

Respondents that stated Other (11) tended to be European and an additional Eight respondents did not wish to answer the question.

Table 15. Ethnicity of respondents

Ethnicity	Count	%
White British	1018	**85.9%**
White Irish	11	0.9%
White Other	123	**10.4%**
Asian British	4	0.3%
Asian	13	1.1%
Black British	1	0.1%
Black	**0**	0.0%
Mixed	4	0.3%
Other	11	0.9%
Total	**1185**	

9.3 Disability

This question was another first for the visitor survey and as such has no comparable baseline.

1 in 20 respondents stated that their mobility was **limited a little**, the distribution across sites is fairly even, although **Arundel** (10) and **Lewes** (9) both saw over 1 in 10 respondents. A further **2%** of respondents reported their mobility was **limited a lot**, **Pulborough Brooks** (7) and **Beachy Head** (6) accounted for almost half of these visits suggesting there is potential learning from these sites that could be imitated elsewhere.

Recommendation 12 Learning, Outreach and Volunteering Lead and Access and Recreation Lead to assess if there are material reasons why Pulborough Brooks and Beachy Head attract a higher proportion of visitors with limitations to their day to day activities and consider how these successes can be replicated elsewhere

Table 16. Limitations on day to day activities

	Limited a lot		Limited a little		No		
	No.	%	No.	%	No.	%	base
Alfriston	1	2%	1	2%	58	97%	60
Alice Holt Country Park	1	1%	1	1%	77	97%	79
Arundel	4	5%	10	13%	65	82%	79
Beachy Head	6	8%	4	6%	61	86%	71
Blackdown	0	0%	4	5%	76	95%	80
Devil's Dyke	2	2%	5	5%	85	92%	92
Ditchling Beacon	0	0%	3	5%	57	95%	60
Harting Down	1	2%	2	3%	57	95%	60
Lewes	2	2%	9	10%	80	88%	91
Midhurst	1	1%	4	5%	75	94%	80
Old Winchester Hill	0	0%	5	6%	75	94%	80
Petworth	2	3%	3	5%	54	92%	59
Pulborough Brooks	7	9%	3	4%	69	87%	79
Queen Elizabeth Country Park	0	0%	0	0%	80	100%	80
Seven Sisters Country Park	1	1%	3	4%	76	95%	80
Winchester City Mill	0	0%	2	3%	57	97%	59
Total	28	2%	59	5%	1102	93%	1189

11. Overseas Visitors

Overseas visitors made up almost 10% of the respondents to the survey (117 people), with over a third of these (41) visiting <u>Seven Sisters Country Park</u>, making up over 51% of the total respondents at this site. This high proportion is especially stark when contrasted to <u>Beachy Head</u>**,** a site geographically very close that had less than 10% of respondents from overseas.

<u>Lewes</u> and <u>Arundel</u> also saw a significant number of overseas visitors (23% and 16% respectively).

There was diverse range of overseas visitors, with the **117** respondents representing **28** different countries or British Overseas Territories. However, there was clear strong representation from certain countries with 50% of visitors coming from four countries (in order of number of visitors): **Germany, USA, Australia** and **Holland**.

Awareness of the National Park designation amongst overseas visitors was lower than any specific visitor type, but still high at **57%**. Perhaps more importantly though, of those aware of the designation, **51%** said that it had been a factor in the decision to visit the area.

12.   Full list of recommendations

Recommendation 1: Consider how we can increase the promotion of Blackdown as a destination for non-local residents

Recommendation 2: Consider the wording of the awareness question to make it less leading. In addition consider the routing of the questionnaire for sites on or outside the boundary

Recommendation 3: Tourism lead to work with accommodation providers to raise awareness of the South Downs National Park designation

Recommendation 4: Research and Evidence Officer to consider ordering and wording of repeat visit question to remove ambiguity regarding repeat visits. I.e. a repeat visit within week does not count if it is within the same "trip"

Recommendation 5 Research and Evidence Officer to consider how we might capture expenditure by item to better understand what money is being spent on

Recommendation 6 Rangers and/or site owners of relevant sites to see what practicable actions can be taken to address negative contributors to enjoyment

Recommendation 7 Review the inclusion of Alice Holt as a survey site or the placement of the interviewer on this site to better capture visitors

Recommendation 8 Continue to utilise traditional hard copy formats to inform visitors, however, the cost and environmental considerations of these formats may not be worth it when considering this is still only a small section of the market

Recommendation 9 Due to the high use of partner websites such as FC, RSPB, and NT use South Downs shared identity on sites within the park. Consider best way to utilise trip advisor

Recommendation 10 Research and Evidence Officer to revise 'none of these' to 'none' in this question as alternative resources are captured in 'other'

Recommendation 11 Learning, Outreach and Volunteering Lead to consider implications of the drop in youth representation in visitor demographic

Recommendation 12 Learning, Outreach and Volunteering Lead and Access and Recreation Lead to assess if there are material reasons why Pulborough Brooks and Beachy Head attract a higher proportion of visitors with limitations to their day to day activities and consider how these successes can be replicated elsewhere

13. Appendix

Appendix 1. Questionnaire

SOUTH DOWNS NATIONAL PARK SURVEY 2018   Location code: .... Interviewer: ....

Date: /   /18   **Time:** 8-10am 1   10am -12pm 2   12-2pm 3   2-4pm 4   4-6pm 5   6-8pm 6

Good morning/afternoon, my name is .... and I work for a company called Tourism South East. We are conducting a survey of leisure 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 about 7-8 minutes, would you be willing to take part?   Refusals:- 1   2   3   4   5   6

1. Were you aware that you are in the South Downs National Park?

Yes	1	Go to Q2	No	2	Go to Q3

2. Was the National Park designation a factor in deciding to visit this area?

Yes	1		No	2	

3. Is this your first visit to the area?

Yes	1	Go to Q5	No	2	Go to Q4

4. How often have you visited this area over the past 12 months? (Select one option)

More than once a week	1
About once a week	2
About once a month	3
About four times this year	4
About once this year	5

5. Visitor type: SHOW MAP & SHOWCARD 1

Local resident (live within 10 miles of this location)	1	Go to Q11
Day visitor (living further than 10 miles from this location)	2	
Overnight visitor (staying within the National Park)	3	Ask Q6
Overnight visitor (staying outside the National Park)	4	Ask Q6

6. Where are you staying overnight (name of town or village)?

Write in location eg. Midhurst [   ]

7. How many nights are you staying on your visit?

Number of nights staying [   ]

8. What type of accommodation are you staying?

Hotel	1	Go to Q9
B&B	2	Go to Q9
Pub/Inn	3	Go to Q9
AirBnB/Homestay	4	Go to Q9
Caravan (static rented or owned or towed)	5	Go to Q9
Glamping (inc. Yurts/tepees/shepherds huts/etc)	6	Go to Q9
Camping	7	Go to Q9
Staying with friends or family	8	Go to Q11

9. How much has your party spent on your accommodation for the DURATION of your stay (inclusive of breakfast if included in the price of your accommodation)? Write approximate figure to the nearest £.
Please leave blank if do not know.

Accommodation cost for duration of stay	£ [ ]

10. How many people does this cost cover?

Total people [   ]

11. Which mode/s of transport have you used to GET TO this area today, and which was the MAIN mode of transport used: Select only one main mode, and circle any others in the 'also used' column

	MAIN	Also used
Private car/ van/ other motor vehicle	1	1
Rented motor vehicle	2	2
Bus/ coach service	3	3
Coach tour	4	4
Bicycle (own)	5	5
Bicycle (hired)	6	6
Train	7	7
Walked/On foot	8	8
Boat/ ferry	9	9

12. What do you plan to do on your visit to this area? (Select all that apply)

Go for a walk	1
Have a picnic	2
Walk the dog	3
Go for a jog/run	4
Watch wildlife	5
Cycle (on my own bike)	6
Cycle (on a hired bike)	7
Visit a historic house or gardens	8
Visit a museum or gallery	9
Visit cafe/pub/tea room	10
Shopping	11
Other (please specify below)	12

....

13. What resources did you use to plan your trip or influenced your choice/decision to visit? (Select all that apply) SHOWCARD 2

Information leaflets	1
Magazines (e.g. National Trust)	2
Word of mouth	3
The Internet/websites (please specify which ones)	4
Facebook	5
Twitter	6
Other social media (e.g. Instagram)	7
Local or national radio	8
Local or national TV (e.g. Countryfile)	9
Local or national newspapers/magazines	10
Apps (please specify which ones)	11
Paper maps (e.g. Ordnance Survey)	12
NONE OF THESE	13
Other (please specify below)	14

....

14. How would you rate your level of overall enjoyment of your visit to this part of the South Downs National Park so far today? *Where 1= 'very poor' and 5= 'very high'*

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

15. What factors contributed to your enjoyment of your visit to this part of the South Downs National Park today? *SHOWCARD 3. Select all mentioned*

Scenic landscape &/or breathtaking views	1
Nature/wildlife	2
Tranquil/unspoilt places	3
Outdoor recreation activities	4
Distinctive towns & villages	5
Rich cultural heritage	6
Availability of locally sourced produce	7
Good value for money	8
Good places to eat and drink	9
Plenty of things to see and do	10
Easy to get to	11
Good access to the countryside	12
Other *(please specify below)*	13

16. Is there anything that would have made your visit today more enjoyable?

Yes	1	Go to Q17	No	2	Go to Q18

17. What do you feel would have made your visit today more enjoyable? *Please use as few words as possible and no more than three mentions.*

1. ....

2. ....

3. ....

18. Excluding any accommodation costs, please tell us approximately how much you and your immediate party expect to spend today in the South Downs National Park (for example on travel, food and drink, admission charges, shopping, etc) during your visit? *Write approximate figure to nearest 50p. Put '0' if spent nothing. Leave blank if unsure.*

Expenditure during visit	£

19. Please can you tell us how many people in your group fall within each of the age and gender ranges on this card? *SHOWCARD 4: enter number of people in each age/gender range*

Age range	Male	Female	Non-Binary/ Third gender
Under 16 years			
16-24 years			
25-34 years			
35-44 years			
45-54 years			
55-64 years			
65+ years			

20. How would you describe your <u>ethnic</u> origin? *SHOWCARD 5*

White British	1
White Irish	2
White Other	3
Asian British	4
Asian	5
Black British	6
Black	7
Mixed	8
Other ethnic group *(please specify below)*	9
Do not wish to answer	10

21. Are your day-to-day activities limited because of a mental or physical health problem or disability which has lasted, or is expected to last, at least 12 months?

Yes, limited a lot	1
Yes, limited a little	2
No	3
Do not wish to answer	4

22. Finally, please tell us your postcode. *This is for mapping and analysis only – it will not be used for marketing or to identify individuals. Probe for FULL postcode. If non-UK visitor, please record the Country of residence.*

Postcode:	

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

Name of respondent: _____

Email / Tel: _____

THANK AND CLOSE

Appendix 2 Factors that detracted from enjoyment

	Number of mentions
Parking	57
Weather	42
Toilets	31
Catering	30
Traffic	25
Directions	25
Information	13
Dog Poo	17
Public Transport	11
Access	11
Misc	10
Water Tap	10
Seating	10
Wildlife	8
Castle Shut	8
More facilities for young	6
Expense	5
Bins	5
Cyclists	5
Rubbish	5
Shopping	4
Disabled Access	3
Routes	3
Dog off lead	2
ATM	2
Dogs on lead	2
Accommodation	2
Building Work	1
Visitor Centre	1
Cow Poo	1
Phone coverage	1
Less information	1
Less People	1

Appendix 3 Full List of websites mentioned

Website	Number of mentions	Website	Number of mentions
Google	89	Blog	1
National Trust	23	Caravan Club	1
SDNP	20	Cottagedirect	1
Forestry Commission	17	Cycling	1
RSPB	16	Tripadvisor	1
Trip Advisor	13	Gliding Club	1
National Trails	5	Butterfly Conservation	1
Lewes	6	Hotel.Com	1
Booking.Com	3	Ifootpath	1
Brighton	3	Premier Inn	1
Seven Sisters	3	Queen Elizabeth Country Park	1
Visit Winchester	3	Ramblers	1
Weather	3	South East Tourism	1
Brighton Buses	2	Paragliding	1
Buyagift	2	Southern Rail	1
Vist Eastbourne	2	Travel Line	1
Walkingclub.Org	2	Visit Midhurst	1
Airworks	1	Wikipedia	1
Net Mums	1	Youth Hostel	1
Artwave	1	Misc	8