South Downs
National Park
Visitor Survey 2021

Final Report

March 2022

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Project details and acknowledgements

Title	South Downs National Park Visitor Survey 2021
Client	South Downs National Park Authority (SDNPA)
Project number	21066
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This project has been delivered to ISO 9001:2015, 20252:2019 and 27001:2013 standards.

Key findings at a glance

Visitors survey 2021

South Downs National Park Authority
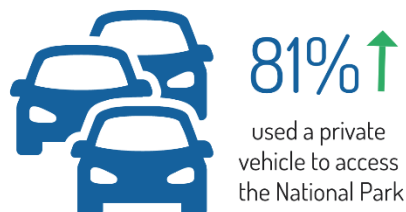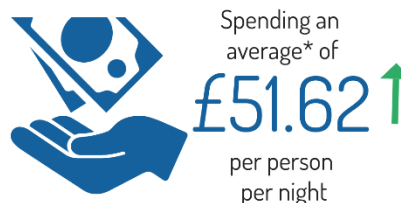
Tourism South East (TSE) were commissioned by the South Downs National Park Authority (SDNPA) to undertake the field work component of the survey. Overall, 2,239 10 minute face to face interviews were completed with visitors at 23 sites across the National Park between July and September 2021. A minimum of 100 interviews were required for locations with heavy footfall and 50 for locations that were visited less frequently.

PERFORMANCE INDICATORS

Indicates an increase ⬆, decrease ⬇ or no change ▬ since 2018
*mean

Visitors were staying an average of
3.9 ⬇
nights

Spending an average* of
£51.62 ⬆
per person per night

Spending an average* of
£35 ▬
while in the National Park

81% ⬆
used a private vehicle to access the National Park

Location — The most common places visitors were staying was Eastbourne (39) and Brighton (18)

Usage of private vehicle access was highest at West Walk (95%), Blackdown (93%), Old Winchester Hill (93%), Harton Down (92%), Alice Holt Country Park (91%) and Pulborough Brooks (91%)

Accommodation — The average spend per person each night is higher inside the National Park compared to those staying in South Downs outside of the National Park. This excludes those staying in a caravan, camping or a self catering accommodation.

98% rated their enjoyment of the National Park as high

Reasons for enjoyment

68% — Enjoying the fresh air

65% — Scenic landscape/ breathtaking views

51% — Nature/ wildlife
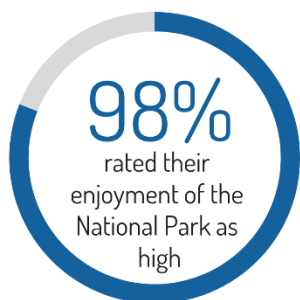
Results

89%
were aware they were in the National Park
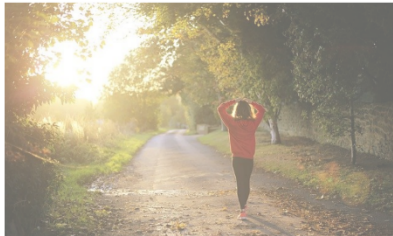
53%
said the location being in a National Park was a deciding factor for visiting

How often people visit

| 13% | 9% | 11% | 17% | 12% | 37% |

- ● More than once a week
- ● About once a week
- ● About once a month
- ● About four times this year
- ● About once this year
- ● This my first visit

Sub group variations
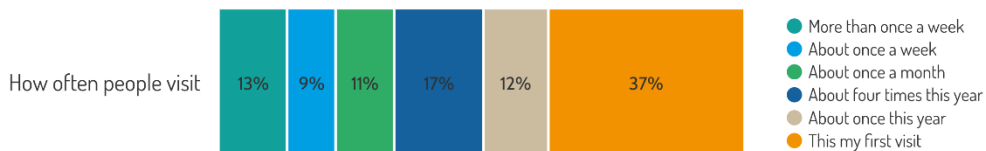
Overnight visitors

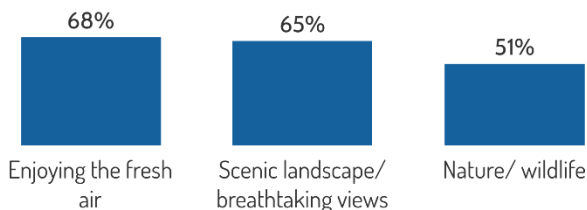Overnight visitors were most likely to be first time visitors, including both those staying within the National Park (77%) and outside the National Park (79%).

Local residents

Local residents were most likely to visit more than once per week.

Location

Those interviewed at Beachy Head were most likely to be first time visitors (64%).

Type of accommodation people were staying in

Hotel	34%
Staying with friends or family	17%
AirBnB/Homestay	11%
B&B	10%
Self catering	9%
Caravan	6%
Camping	6%
Pub/Inn	4%
Hostel	2%
Glamping	1%

Sub group variations
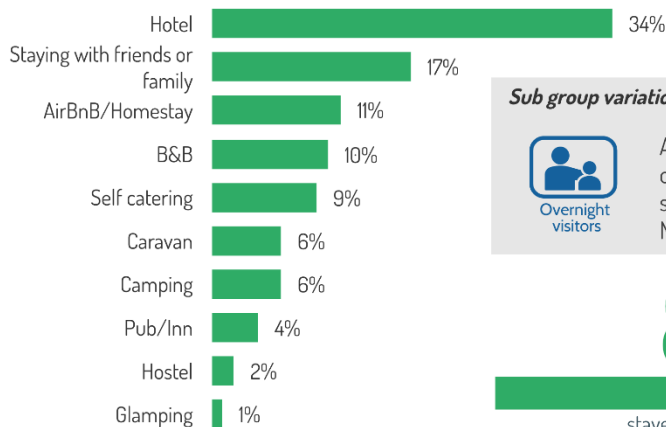
Overnight visitors

A hotel was the most common type of accommodation amongst visitors staying both within and outside of the National Park

83%
stayed in unpaid accommodation

Average length of stay

4.2 Nights — Paid accommodation

5.3 Nights — Unpaid accommodation

Average spend per person

£51.86 — Staying inside SDNP

£51.38 — Staying outside SDNP

Most common activities on the day

Activity	
Go for a walk	64%
Visit a cafe/ pub/ tearoom	33%
Dog walking	22%
Wildlife watching	15%
Picnic	13%
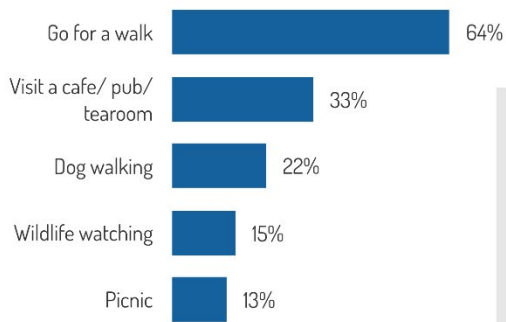
Sub group variations

Location

Alfriston was the most common location where respondents said they were visiting a café/ pub/ tearoom.

Pullborough Brooks was the most common location to go wildlife watching.

43%
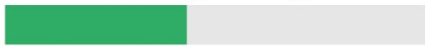
said being outside in nature has become more important during Covid-19.

Useful sources of information when planning a trip to the South Downs National Park [TOP 3]
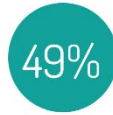
49%	23%	17%
Previous knowledge	Google search	Word of mouth

Summary of findings

The 2021 survey has shown that **one in four people** who visited the National Park were **local to the area** (within a 10-mile radius), while just over a third visited for the day but lived further away. Around a **fifth of people** spoken to were **staying overnight**, either inside or outside the National Park boundary. There have been minor variations as to where people visited the Park from, in comparison to the previous survey period (2018, pre-COVID-19). The most notable variation was the **lower proportion of international respondents in 2021** which is not a surprising finding given the pandemic restrictions and uncertainty. There have been variations in the age profile of the groups interviewed, with a decrease (-7% points) in younger under 16 respondents and an increase (+6% points) in older respondents (those aged 45 or older). Compared with the 2018 survey, there is a 10% increase in the proportion of respondents who realised they were in the South Downs National Park, most notably at Alice Holt Country Park. It should be noted that Alice Holt County Park sits just inside the National Park boundary. Although this site continues to have the lowest level of awareness of its association with the National Park, it is positive that awareness has increased by 31% since the 2018 survey.

There has also been a positive increase in the proportion of first-time visitors to the National Park since 2018 (+10%). Specifically, there has been a **significant increase** in the proportion of **BAME people** visiting the National Park **for the first time**. Overall, first time visitor were most likely have visited locations such as Beachy Head, Petworth, Seven Sisters and Alfriston.

The pandemic has altered many ways in which people now go on holiday, and this change in habits is no different amongst those visiting the South Downs National Park. The highest proportion of overnight respondents were staying in a hotel, whilst the proportion of respondents staying with family and friends has decreased since 2018. **This may not be surprising as many respondents may not have wanted to stay indoors around friends and family during the pandemic, with fears of catching or spreading COVID-19.** Overall, amongst the profile of respondents surveyed, there were more (+8%) respondents paying for accommodation rather than using unpaid options compared to 2018. The average length of overnight stays has fallen since 2018, from an average of 4.7 nights to 3.9 nights in the most recent survey period. Respondents were more likely to spend more nights in self-catering, caravan or AirBnB/Homestay accommodation when compared to other types of accommodation.

The average spend per person per night has however increased (+£11.71 on average per night) when compared to 2018. Although it should be noted that the variety of accommodation types used by respondents in 2021 is not consistent with that recorded in 2018. When comparing the results of accommodation type by average spend per person per night, the average spend per person per night

amongst those staying in a AirBnB, B&B or hotel is higher **inside the National Park** compared to those staying **outside the National Park**. On a total level, the average accommodation spend for respondents was just over £51 per night per person. When comparing these figures to 2018, accommodation spend per person, per night has risen by £12 outside and by £9 within the National Park.

Eight in ten respondents had either used a **petrol/diesel private vehicle** (77%) or, a private electric vehicle (4%) **to visit the National Park**. This result has remained relatively consistent compared to 2018. Petrol/ diesel private vehicle use was most likely to be seen amongst respondents visiting West Walk, Blackdown, Old Winchester Hill, Harting Down, Alice Holt Country Park and Pulborough Brooks. There were some sites that had **higher proportions of respondents walking** to the sites such as Truleigh Hill, Winchester City Mill, Petersfield Heath and Alfriston.

The most popular types of activities respondents had planned were going for a **walk** or **visiting a café**. However, **the proportion anticipating visiting a café/pub tearoom is down** by 17% since 2018 – likely as a result of the pandemic as some respondents may be trying to avoid visiting indoor facilities.
The **level of enjoyment** that respondents were getting from their visit to the National Park is **high** (98%), this result has remained stable since the previous survey period. Note that there has been **an increase in the proportion of respondents stating that their enjoyment was 'very high',** from 64% in 2018 to 69% in 2021, perhaps highlighting an increase in value being placed upon getting outdoors as a result of the COVID-19 pandemic. Exploring how respondents' experiences could be improved, **improving the facilities** and/or having them open for longer and having **better signage** or **information in the National Park** were most commonly mentioned. These were following by **improving and/or increasing the parking options** available.

Recommendations

Based on the data collated from the survey, a number of recommendations have been made based upon the feedback respondents have given in relation to their visit to the South Downs National Park and how visits could be improved going forward.

- National Parks' assets can offer opportunities for visitors and for the rural economy by tapping into the people who would prefer to holiday in the UK. Although the National Parks Tourism Officer does not directly market the SDNP, sustainable tourism initiatives could be developed alongside South Downs National Park and other marketing destination partners. Not only

would this help to bring more visitors to the National Park, it would ensure that this is done in a sustainable way as to not cause harm to the surrounding environment.

- When compared to 2018, there have been more overnight visitors within the South Downs National Park in 2021. It may be worth exploring why overnight stays increased during a pandemic as opposed to pre-pandemic 2018.

- Those with a long-term illness or disability are most likely to have visited Queen Elizabeth Country Park and Beachy Head. It may be of benefit to understand whether these sites are more accessible for visitors to the National Park who have a long-term illness or disability. This will help to understand whether any accessibility improvements could be made at other sites within the National Park.

- The increase in first-time visitors to the National Park is positive. Therefore, the Authority should continue to raise awareness of various locations throughout the area alongside the importance of the National Park and activities available.

- Some areas have seen a decrease in respondents being aware they were in the South Downs National Park, most notably those visiting the Queen Elizabeth Country Park and Pulborough Brooks. Further awareness raising around these areas may be required to ensure those visiting these sites are aware that these areas make up part of the South Downs National Park.

- As hotel accommodation seems to be preferred by respondents staying overnight, the SDNPA could look at building up relationships with providers by signposting to each other's services e.g. activities in the park etc.

- The National Park Authority should look to reassure people coming to the National Park to visit café/pubs etc. of the associated measures being taken to mitigate the risk of COVID-19.

- There has been an increase in the diversity of first-time visitors when compared to 2018, meaning previous knowledge of the National Park may not be there for people when making the decision to visit the National Park. The data highlights that Google searches and other online websites are an important tool for BAME respondents. Therefore it is important to make sure there is up to date online content for visitors coming to the site for the first time, to ensure they make the most of their visit which will in turn encourage repeat visitation.

- It is clear that the National Park has a positive impact on visitors' experience and offers an outlet for those who are less able and more likely to be impacted (both physically and

mentally) by the fall out of the pandemic. The National Park Authority therefore should continue to recognise, promote and connect with other service providers e.g. statutory services to see how they can improve access and involvement in the National Park, for example linking into social prescribing initiatives.

- As the majority of people visiting the National Park are using vehicles, further work may be needed to encourage visitors to use more sustainable ways to travel to the National Park. This could be in the way of initiatives such as offering discounts and working alongside transport operates who operate within the National Park to provide initiatives to further encourage use.

Background

Introduction

This report outlines the findings from the fifth South Downs National Park (SDNP) visitor survey. Previous surveys were undertaken in 2018, 2015, 2014 and 2011. Where appropriate, comparisons have been made to the 2018 survey.

Tourism South East (TSE) were commissioned by the South Downs National Park Authority (SDNPA) to undertake the field work component of the survey. Overall, 2,239 face to face interviews of 10 minutes in length were completed with visitors at 23 sites across the National Park between July and September 2021. A minimum of 100 interviews were required for locations with heavy footfall and 50 for locations that were visited less frequently. Table 1 below shows the distribution of the interviews across the locations.

Table 1: Distribution of visitor interviews by location

Locations	Interviews	%
Alfriston	108	5%
Alice Holt Country Park	125	6%
Arundel	123	5%
Beachy Head	115	5%
Birling Gap*	115	5%
Blackdown	115	5%
Butser Hill*	74	3%
Cissbury/Chanctonbury*	70	3%
Devil's Dyke	106	5%
Ditchling Beacon	96	4%
Harting Down	100	4%
Kingley Vale*	50	2%
Lewes	99	4%
Midhurst	117	5%
Old Winchester Hill	102	5%
Petersfield Heath*	60	3%
Petworth	90	4%
Pulborough Brooks	107	5%
Queen Elizabeth Country Park	115	5%
Seven Sisters	156	7%
Truleigh Hill*	56	3%
West Walk*	60	3%
Winchester City Mill	80	4%
Total	**2,239**	**100%**

*   = seven new sites included in the 2021 sampling.

The sample size of visitors in 2021 (2,239) is almost double that collected in 2018 (1,193). When making comparisons to the 2018 data, it should be recognised that 485 interviews, or 22% of the sample in 2021, have come from sites not covered by the 2018 data*. In particular, this change has the potential to influence site-specific survey responses e.g. the mode of transport used that day and the reasons for visiting the area on the day of the interview.

Icon glossary

📍	Location	♿	Long term health problem or disability
👥	Ethnicity	🚹🚺	Gender

Differences in the views of sub-groups of the population were compared using z-tests. Statistically significant results (at the 95% level) are indicated in the text. Statistical significance means that a result is unlikely to have occurred due to chance (i.e. It is a real difference in the population). However it should be noted that the profile of the respondents may not be representative of the true population of all South Downs National Park visitors.

Owing to the rounding of numbers, percentages displayed visually on graphs and charts within this report may not always add up to 100% and may differ slightly when compared with the text. The figures provided in the text should always be used. Where figures do not appear in a graph or chart, these are 3% or fewer respondents. The 'base' or 'n=' figure referred to in each chart and table is the total number of respondents who provided a valid response. Analysis should be taken with caution when viewing a subgroup with a base lower than 30.

*All sites surveyed fell within or on the boundary of the National Park and, during the most recent survey period, seven new sites were included in the 2021 sampling due to an increased desired sample. Feedback from onsite staff also suggests these sites had an increase in visitor numbers since the start of the COVID-19 pandemic

Section 1: Visitor profile

Visitor type

Across the total sample there was a fairly even split between local residents (40%) and day visitors (37%). One in eight (12%) were overnight visitors staying outside of the National Park and 10% were overnight visitors staying within the National Park (Figure 1).

In 2021, a higher proportion of visitors were local residents, when compared to 2018 (40% compared to 35%). There has been little change in the proportion of visitors who were staying overnight between 2018 and 2021 (22% in 2021, and 26% in 2018). As expected there was a slight drop in the proportion staying overnight in 2021, which reflects the impact of COVID-19 on peoples' willingness and ability to stay away from home overnight

Figure 1: Visitor type by survey period
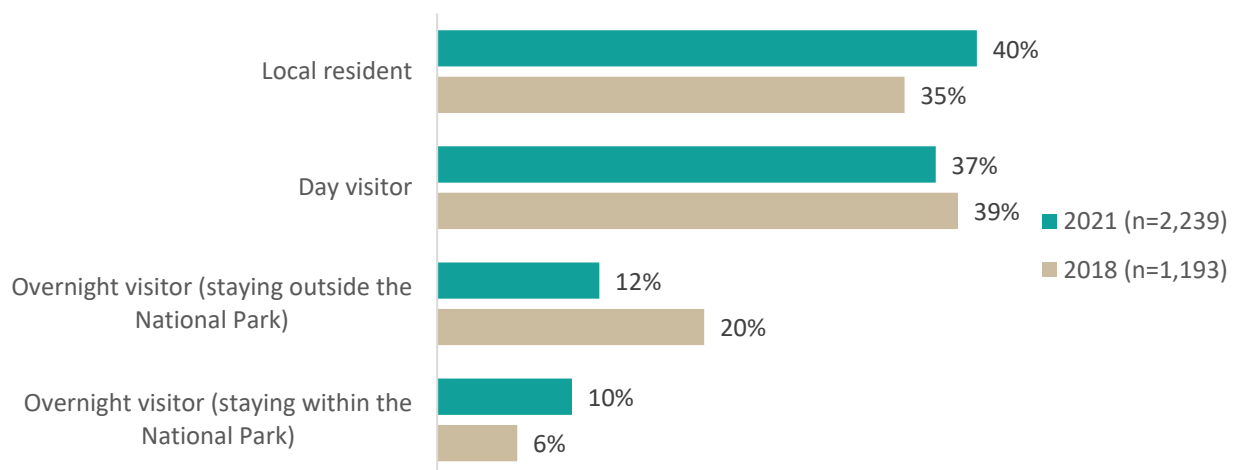
Comparing the type of visitors by location (Table 2) shows that **Beachy Head** was the only area that had **more overnight visitors** (59%) than non-overnight visitors (42%). Other locations with comparatively high proportions of overnight visitors include Alfriston (41%), Petworth (40%) and Lewes (39%). The locations where local residents (i.e. those living within 10 miles) made up the majority (50% or more) of visitors were:

- West Walk 82%
- Blackdown 79%
- Petersfield Heath 67%
- Kingley Vale 64%
- Cissbury/Chanctonbury 60%

Table 2: Visitor type by location *(sorted highest to lowest by overnight visitor total)*

Survey site	Local resident	Day visitor	Overnight visitor within NP	Overnight visitor outside NP	Non-overnight visitor total	Overnight visitor total
Beachy Head	12%	30%	3%	56%	42%	59%
Alfriston	22%	37%	24%	17%	59%	41%
Petworth	20%	40%	21%	19%	60%	40%
Lewes	33%	27%	31%	8%	60%	39%
Birling Gap	27%	38%	15%	20%	65%	35%
Truleigh Hill	45%	23%	27%	5%	68%	32%
Ditchling Beacon	42%	28%	3%	27%	70%	30%
Winchester City Mill	28%	43%	20%	10%	71%	30%
Arundel	37%	34%	11%	19%	71%	30%
Devil's Dyke	45%	29%	4%	22%	74%	26%
Seven Sisters	27%	50%	15%	8%	77%	23%
Midhurst	49%	33%	15%	3%	82%	18%
Old Winchester Hill	37%	48%	7%	8%	85%	15%
Kingley Vale	64%	24%	4%	8%	88%	12%
Butser Hill	47%	41%	8%	4%	88%	12%
Harting Down	36%	52%	6%	6%	88%	12%
Pulborough Brooks	37%	52%	4%	7%	89%	11%
West Walk	82%	12%	2%	5%	94%	7%
Blackdown	79%	13%	3%	4%	92%	7%
Queen Elizabeth Country Park	40%	54%	3%	3%	94%	6%
Cissbury/Chanctonbury	60%	34%	4%	1%	94%	5%
Alice Holt Country Park	46%	52%	2%	1%	98%	3%
Petersfield Heath	67%	32%	0%	2%	99%	2%

In terms of overnight stays within the National Park, the proportion of those staying has increased the most since 2018 in Alfriston, Petworth, Lewes, Winchester City Mill and Seven Sisters. The proportion of those staying overnight within the National Park has seen the greatest reduction compared to 2018 in Ditchling Beacon and Queen Elizabeth Country Park.

Table 1: Visitor type by location (2021 vs. 2018) *(sorted highest to lowest by overnight visitor total)*

Survey site	2021		2018	
	Overnight visitor within NP	Overnight visitor outside NP	Overnight visitor within NP	Overnight visitor outside NP
Beachy Head	3%	56%	1%	47%
Alfriston	24%	17%	17%	15%
Petworth	21%	19%	7%	10%
Lewes	31%	8%	17%	34%
Birling Gap	15%	20%	N/A	N/A
Truleigh Hill	27%	5%	N/A	N/A
Ditchling Beacon	3%	27%	12%	18%
Winchester City Mill	20%	10%	3%	22%
Arundel	11%	19%	8%	49%
Devil's Dyke	4%	22%	1%	20%
Seven Sisters	15%	8%	6%	55%
Midhurst	15%	3%	9%	13%
Old Winchester Hill	7%	8%	3%	3%
Kingley Vale	4%	8%	N/A	N/A
Butser Hill	8%	4%	N/A	N/A
Harting Down	6%	6%	5%	8%
Pulborough Brooks	4%	7%	4%	5%
West Walk	2%	5%	N/A	N/A
Blackdown	3%	4%	0%	1%
Queen Elizabeth Country Park	3%	3%	8%	8%
Cissbury/Chanctonbury	4%	1%	N/A	N/A
Alice Holt Country Park	2%	1%	1%	3%
Petersfield Heath	0%	2%	N/A	N/A

To visually show the spread of respondents, Figure 2 (overleaf) shows the plotted resident postcodes of respondents by visitor type for the most recent survey period.

Figure 2: Plotted postcodes by visitor type

Plotted postcodes by visitor type
- ● Day visitor
- ● Local resident
- ● Overnight visitor (staying outside the National Park)
- ● Overnight visitor (staying within the National Park)
- ☐ National Park boundary

Scale: 1 : 2,019,331

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* Please note the postcode data has been plotted using the data provided by respondents themselves during the survey.

Amongst respondents, the most common areas to travel from were the Portsmouth, Brighton, Guildford, Redhill and Southampton post code areas. A full breakdown of site visitation by postcode area can be found in the appendix. Amongst those with a London postcode of SW, SE, E, N, NW, W, EC or WC, the most common site to visit was Seven Sisters (22), Devil's Dyke (13), Lewes (11) and Birling Gap (10).

A small number of respondents were international visitors. These were from the **12 different countries** listed below. Most commonly these international visitors were from Holland (5 respondents), France (3 respondents) and the USA (3 respondents). When comparing this to the previous survey period (pre-COVID-19), it is not surprising that the proportion of overseas visitors decreased in 2021 (10%/n=117 – 2018 compared to 2%/n=24 in 2021). Anecdotally, Birling Gap was the most visited amongst overseas respondents (8), every other site was visited by 2 or fewer respondents.

	Australia	Belgium	Bermuda	Canada	Denmark	France
	Germany	Holland	India	South Africa	Switzerland	USA

Age profile

The overall profile of respondents and group members by age group is shown in Figure 3. In total, **88% of respondents and those they were visiting with were aged 16 or older**. Visitors were most commonly in the 65+ age group (24%). Those aged 16-24 were less likely to have been interviewed or part of the group interviewed (4%). This proportion is unchanged since 2018 (also 4%). Aggregating the 2021 figures shows that 61% of the visitors in 2021 were aged 45 and over, which is higher than in 2018 (53%). The proportion of under 16s in the 2021 data was down 7% compared to 2018 (12%). While there appears to be a downward trend in the proportion of visitors aged under 16, it should be noted that visits by this group were likely to depend on the decisions of others, i.e. parents, guardians, teachers. It's worth noting that demographic data was not collected amongst respondents who did not complete the survey. The demographic profile of those who did not want to take part will be collected during fieldwork of the next survey to allow comparison going forwards.

Figure 3: Age group profile of all respondents and group members by survey period

Legend: ■ 2021 (n=3,346) ■ 2018 (n=2,964)

Age group	2021	2018
Under 16	12%	23%
16 to 24	4%	7%
25 to 34	9%	10%
35 to 44	14%	7%
45 to 54	17%	14%
55 to 65	20%	19%
65+	24%	20%
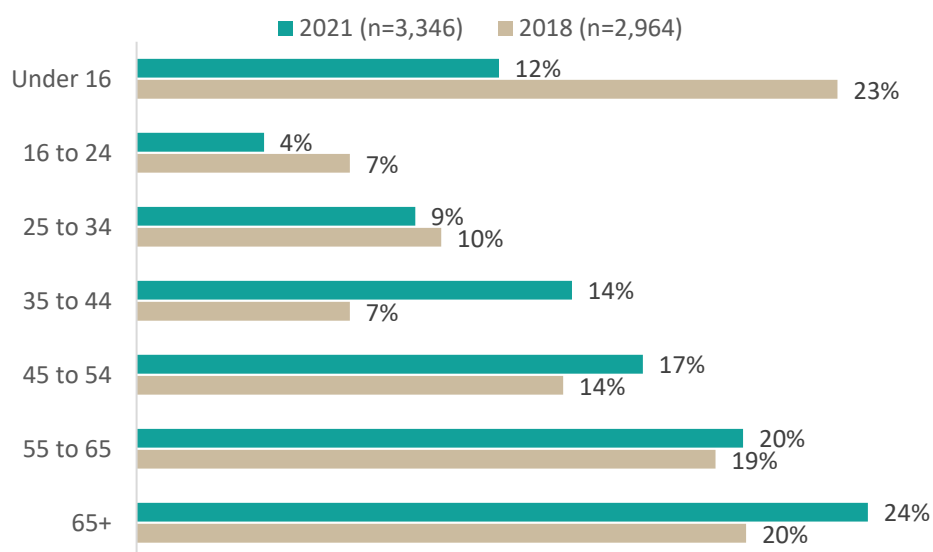
Analysis by age group (Table 3) shows that in all age groups a higher proportion were day visitors rather than visitors staying overnight. Those **aged 55 to 64** (26%) and **65-74** (27%) were most commonly visiting with an **overnight stay** of some description.

Table 3: Visitor type by age group

	Under 16 (n=398)	16 to 24 (n=140)	25 to 34 (n=306)	35 to 44 (n=478)	45 to 54 (n=556)	55 to 65 (n=666)	65 to 74 (n=555)	75+ (n=247)
Local resident	45%	40%	39%	43%	38%	36%	38%	45%
Day visitor	44%	42%	41%	40%	39%	39%	35%	31%
Overnight visitor (staying within the National Park)	4%	4%	11%	9%	10%	12%	12%	9%
Overnight visitor (staying outside the National Park)	6%	14%	9%	8%	12%	14%	15%	16%

Ethnicity

In total 4% (n=80) of respondents classified themselves as BAME[1] (Figure 4). When comparing this to the previous survey period, results were similar (2018: 3% BAME).

Figure 4. Ethnicity of visitors interviewed
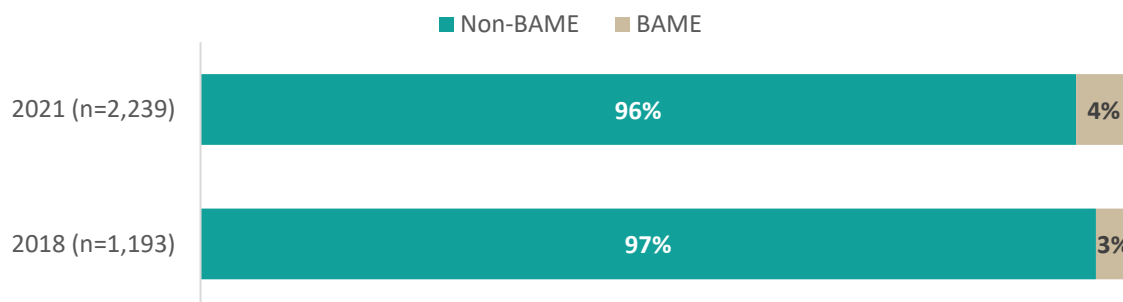
When comparing the ethnicity of respondents by visitor type (Figure 5), results show that non-BAME respondents were more likely to be local residents (42%) compared to BAME respondents (13%). Whilst **BAME respondents** were more likely to be **day visitors** (48% cf. 37%).

Figure 5: Ethnicity by visitor type

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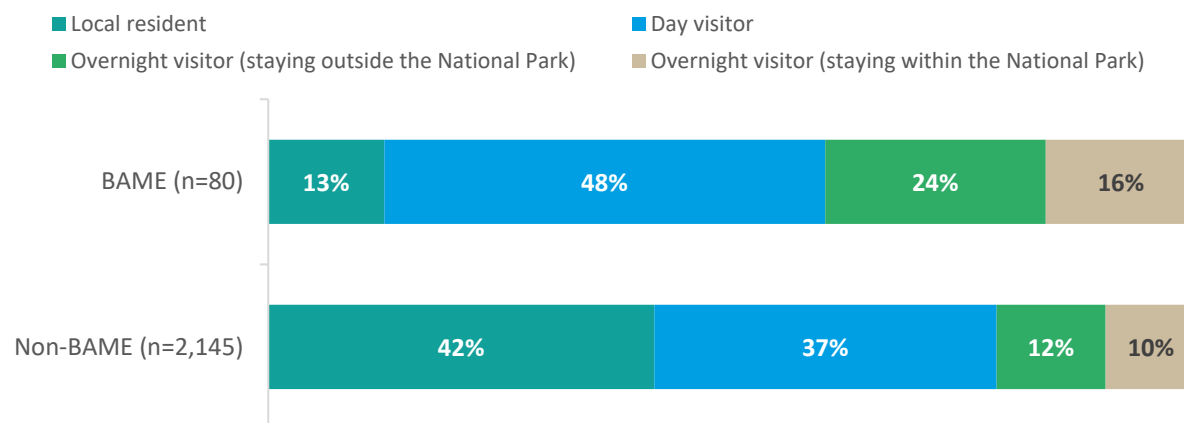
[1] Black, Asian and Minority Ethnic

As seen in Table 4 below, around one in six respondents surveyed in the **Seven Sisters area were BAME** (15%), a higher proportion than other areas. As highlighted on the previous page, BAME respondents are less likely to be local residents, so it is perhaps unsurprising to see the Seven Sisters area as the most visited amongst respondents as this area is notoriously a hotspot for tourists due to photography opportunities and walking along the iconic cliffs within the area.

Table 4: Ethnicity by location

	Non-BAME (n=2,145)	BAME (n=80)
Seven Sisters (n=156)	**85%**	**15%**
Birling Gap (n=115)	94%	6%
Beachy Head (n=115)	95%	5%
Devil's Dyke (n=106)	95%	5%
Winchester City Mill (n=80)	95%	5%
Arundel (n=123)	96%	4%
Butser Hill (n=74)	96%	4%
Kingley Vale (n=50)	96%	4%
Old Winchester Hill (n=102)	96%	4%
Alfriston (n=108)	97%	3%
Alice Holt Country Park (n=125)	97%	3%
Blackdown (n=115)	98%	2%
Ditchling Beacon (n=96)	98%	2%
Harting Down (n=100)	98%	2%
Lewes (n=99)	98%	2%
QECP (n=115)	98%	2%
Truleigh Hill (n=56)	98%	2%
Cissbury/Chanctonbury (n=70)	99%	1%
Midhurst (n=117)	99%	1%
Petworth (n=90)	99%	1%
Petersfield Heath (n=60)	100%	0%
Pulborough Brooks (n=107)	100%	0%
West Walk (n=60)	100%	0%

Disability

In total 9% of respondents said that their day-to-day activities ***were limited either a little or a lot.*** This could have been because of either a mental or physical health problem or disability which has lasted, or is expected to last, at least 12 months (Figure 6). . Results have remained relatively consistent compared to the 2018 survey period.

Figure 6: Disability by survey period
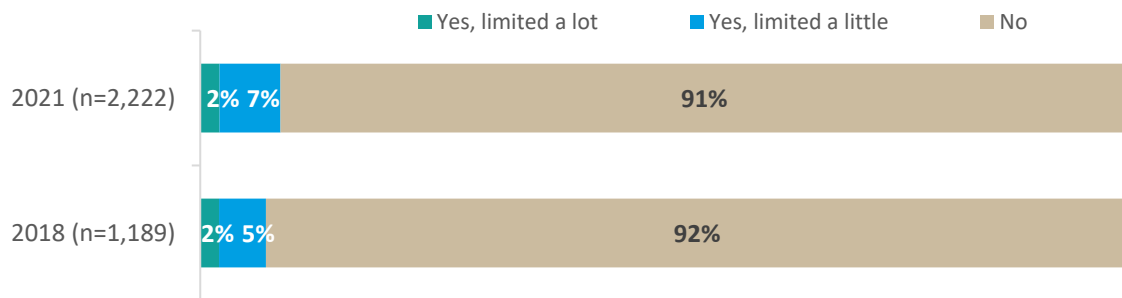
When comparing the levels of disability by location (Table 5), respondents were more likely to state they had a long-term illness or disability at the areas listed below. However, without more details on the nature of conditions individuals have, it is unwise to draw conclusions about whether these locations are more accessible than others (i.e. whether there is any underlying causal effect behind these variations).

- Queen Elizabeth Country Park (21%)
- Beachy Head (20%)
- Petersfield Heath (15%)
- Midhurst (12%)
- Birling Gap (11%)
- Cissbury/Chanctonbury (11%)

Table 5: Long-term illness or disability by location

	Yes, limited a lot	Yes, limited a little	Combined long-term illness or disability	No long-term illness or disability
QECP (n=115)	5%	16%	21%	79%
Beachy Head (n=115)	7%	13%	20%	80%
Petersfield Heath (n=60)	5%	12%	17%	83%
Midhurst (n=117)	1%	11%	12%	88%
Birling Gap (n=113)	4%	8%	12%	88%
Cissbury/Chanctonbury (n=70)	1%	10%	11%	89%
Pulborough Brooks (n=107)	5%	6%	10%	90%
Winchester City Mill (n=80)	0%	10%	10%	90%
Lewes (n=94)	1%	9%	10%	90%
Truleigh Hill (n=56)	2%	7%	9%	91%
Old Winchester Hill (n=102)	0%	9%	9%	91%
Ditchling Beacon (n=96)	2%	6%	8%	92%
West Walk (n=60)	0%	8%	8%	92%
Butser Hill (n=74)	3%	4%	7%	93%
Arundel (n=123)	1%	6%	7%	93%
Harting Down (n=100)	3%	2%	5%	95%
Blackdown (n=115)	1%	3%	4%	96%
Kingley Vale (n=50)	0%	4%	4%	96%
Seven Sisters (n=154)	2%	2%	4%	96%
Devil's Dyke (n=105)	1%	3%	4%	96%
Alfriston (n=108)	1%	3%	4%	96%
Petworth (n=83)	1%	2%	4%	96%
Alice Holt Country Park (n=125)	1%	2%	2%	98%

Section 2: Awareness of the National Park

All respondents were asked whether they were aware they were in the South Downs National Park. This question was added to this survey in 2018 and was retained for 2021. In response, 89% said that they were aware they were in the National Park (Figure 7), significantly higher than the 79% of respondents who said the same in 2018.

Figure 7: Were you aware that you are in the South Downs National Park?

2021 (n=2,036) — Yes 89%, No 11%

2018 (n=1,193) — Yes 79%, No 21%
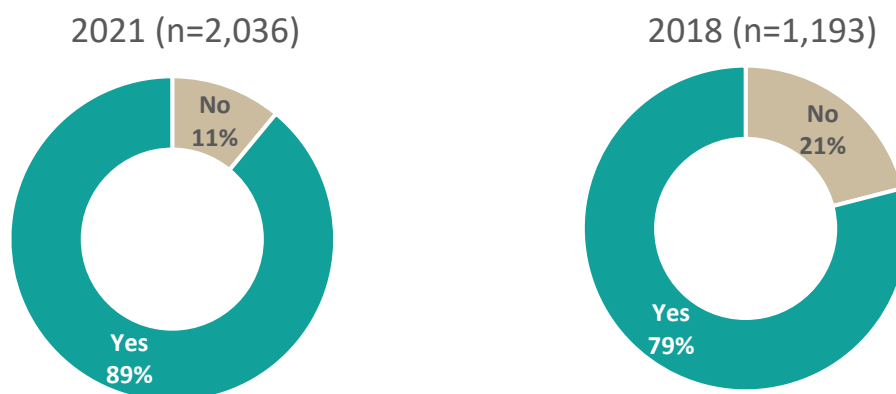
Sub-group analysis shows there were variations by location:

- Awareness that respondents were in the South Downs National Park was high in the majority of locations. **Awareness of this was lowest amongst those in Lewes** (76%) and **Alice Holt Country Park** (72%). It should be noted that Alice Holt Country Park, Arundel and Winchester City Mill are gateways to the National Park.

- Compared to 2018 the most notable increase in awareness of being in the South Downs National Park is at Alice Holt Country Park (+31%) Ditchling Beacon (+12%), Devils' Dyke (+10%) and Lewes (+10%). There has been an increase in road signs at key points in the National Park since the last survey which may have had an impact on awareness of being in the National Park when visiting these areas.

Table 5: Those that were aware that they were in the National Park by location and survey period

	2021	2018	Change in awareness
Ditchling Beacon (n=96)	99%	87%	12%
Harting Down (n=100)	98%	98%	0%
Kingley Vale (n=50)	98%		
Blackdown (n=115)	96%	91%	5%
Cissbury/Chanctonbury (n=70)	96%		

Truleigh Hill (n=56)	96%		
Midhurst (n=117)	95%	88%	7%
Butser Hill (n=74)	93%		
Old Winchester Hill (n=102)	93%	94%	-1%
West Walk (n=60)	93%		
Devil's Dyke (n=106)	92%	82%	10%
Birling Gap (n=115)	91%		
Petersfield Heath (n=60)	90%		
QECP (n=115)	86%	95%	-9%
Beachy Head (n=115)	85%	88%	-3%
Pulborough Brooks (n=107)	85%	91%	-6%
Seven Sisters (n=156)	82%	79%	3%
Alfriston (n=108)	81%	85%	-4%
Petworth (n=90)	80%	73%	7%
Lewes (n=99)	76%	66%	10%
Alice Holt Country Park (n=125)*	72%	41%	31%
*location just outside the National Park boundary			

South Downs National Park status as a driver of visits

Those who said they were overnight visitors, either staying within or outside the National Park, were asked whether the location in the South Downs National Park a deciding factor was in visiting the area (Figure 8). During the most recent survey period **47% said that it was a factor in visiting the area**, significantly more so when compared to the previous survey in 2018 (28%).

Figure 8: Was this location being in a National Park a factor in your decision to visit this area?

2021 (n=438)

Yes 47%

No 53%

2018 (n=939)

Yes 28%

No 72%
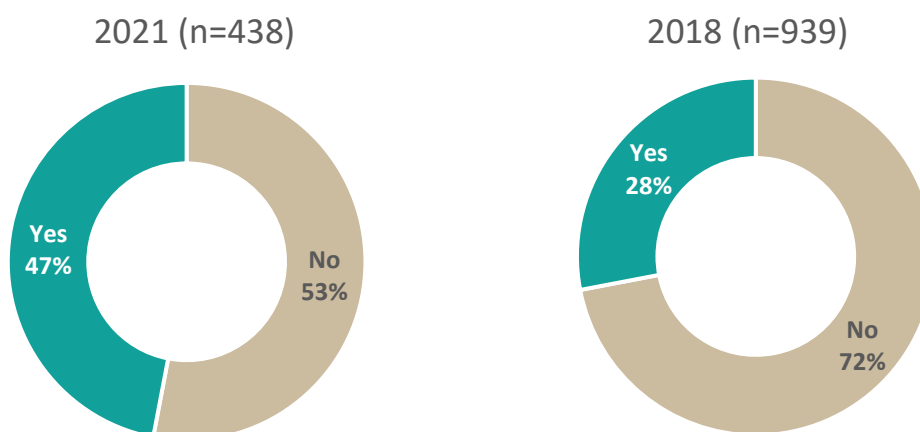
There was no significant variation by sub-group in regards to location being a driving factor of visitation.

How often people visit the National Park

Respondents were asked how often they had visited the area over the past 12 months. In total **37% of respondents said this was their first time visiting** (Figure 9), meaning that 63% were repeat visitors. This balance between new and repeat visitors has shifted since 2018, as 73% were repeat visitors in the 2018 survey. This will likely have been impacted by the ongoing COVID-19 pandemic over the last two years which hass drastically changed people's ability to travel. When interpreting these findings, it should be acknowledged that restrictions to international travel in 2021 have boosted domestic tourism and 'staycations'.

Figure 9: How often have you visited this area over the past 12 months?
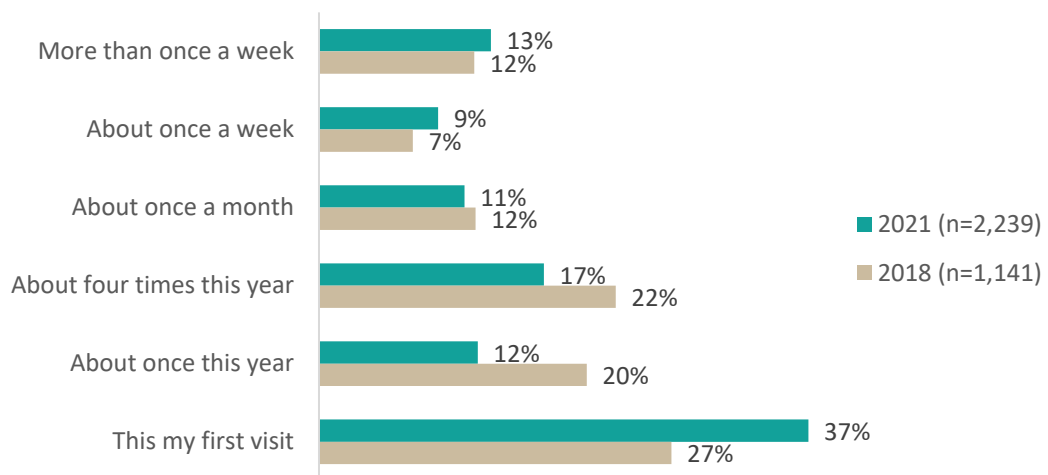
When comparing frequency of visits by visitor type, not surprisingly, **local visitors visit the most regularly.** Almost half (49%) of local resident respondents visited either 'once a week' or 'more than once a week' (Figure 10) – this was a similar result to the 2018 survey. Overnight visitors, both within and outside National Park, were more likely to be visiting for the first time (77% and 79% respectively). This suggests that the Park continues to attract new visitors albeit in rather small proportions.

Figure 10: Frequency of visits by visitor type

Legend:
- More than once a week
- About once a week
- About once a month
- About four times this year
- About once this year
- This my first visit

Local resident (n=905)
- This my first visit: 8%
- About once this year: 7%
- About four times this year: 18%
- About once a month: 19%
- About once a week: 19%
- More than once a week: 30%

Day visitor (n=836)
- This my first visit: 44%
- About once this year: 18%
- About four times this year: 23%
- About once a month: 9%
- About once a week: 4%

Overnight visitor (staying within the NP) (n=226)
- This my first visit: 77%
- About once this year: 14%
- About four times this year: 6%

Overnight visitor (staying outside the NP) (n=272)
- This my first visit: 79%
- About once this year: 13%
- About four times this year: 7%

Sub-group analysis shows there were variations by ethnicity and location:

- There has been a significant **increase in BAME respondents making their first visit to the National Park**. In 2018, 46% of BAME respondents said it was their first visit, this has increased by 23% points during the most recent survey period to 69% stating it was their first visit. This is a positive result as it suggests a more diverse range of visitors are now visiting the National Park.

Figure 11: Percentage stating it was their first visit to the National Park by Ethnicity

Legend:
- 2021 (n=2,225)
- 2018 (n=1,193)

Non-BAME
- 2021: 36%
- 2018: 25%

BAME
- 2021: 69%
- 2018: 46%

- When comparing how often people visit by location (Figure 12), the highest proportion of **first-time visitors** were at: **Beachy Head** (64%), **Petworth** (60%), **Seven Sisters** (57%) and **Alfriston** (56%). As can be observed in table 2, these locations are those less likely to be visited by local visitors.

Table 6: Location by frequency of visit (2021)

Legend:
- ■ First time visitors
- ■ At least once a week or more ■ About once a month
- ■ About four times this year ■ About once this year

Location	First time visitors	At least once a week or more	About once a month	About four times this year	About once this year
Beachy Head (n=115)	64%	6%	3%	10%	16%
Petworth (n=90)	60%	12%	7%	13%	8%
Seven Sisters (n=156)	57%	4%	4%	19%	15%
Alfriston (n=108)	56%	13%	6%	13%	14%
Birling Gap (n=115)	49%	10%	7%	18%	16%
Winchester City Mill (n=80)	49%	24%	4%	14%	10%
Lewes (n=99)	48%	14%	9%	13%	15%
Ditchling Beacon (n=96)	47%	14%	19%	10%	10%
Devil's Dyke (n=106)	44%	12%	17%	16%	12%
Harting Down (n=100)	41%	25%	7%	22%	5%
Arundel (n=123)	37%	24%	6%	16%	18%
Alice Holt Country Park (n=125)	33%	14%	15%	25%	13%
Pulborough Brooks (n=107)	32%	9%	15%	26%	18%
Truleigh Hill (n=56)	32%	21%	14%	21%	11%
Old Winchester Hill (n=102)	28%	24%	17%	17%	15%
Butser Hill (n=74)	27%	22%	14%	30%	8%
QECP (n=115)	26%	28%	10%	26%	10%
Cissbury/Chanctonbury (n=70)	21%	24%	16%	19%	20%
Blackdown (n=115)	15%	56%	18%	6%	5%
Petersfield Heath (n=60)	12%	44%	11%	21%	11%
Kingley Vale (n=50)	10%	44%	22%	12%	12%
Midhurst (n=117)	10%	46%	17%	16%	10%
West Walk (n=60)	10%	65%	10%	13%	2%

Section 3: Staying in the area

Respondents who stated that they were either **staying overnight inside or outside the National Park** were asked a series of questions, including the type of accommodation they were staying in, how long they were staying, and the cost of accommodation per night per individual.

Type of accommodation

A third (34%) of respondents visiting overnight were staying in a **hotel** (Figure 12), making it the most commonly used accommodation type, followed by **'staying with friends or family'** (17%) and 'AirBnB/Homestay' (11%). There has been an **increase in the proportion** (+10%) of overnight respondents **staying in a hotel** and a decrease (-8%) in the those staying with friends and family compared to 2018.

When combined into paid and unpaid categories[2] , 83% of overnight respondents are paying visitors, which represents an increase from 2018 when 75% of overnight visitors were paying visitors.

Figure 12: What type of accommodation are you staying in?
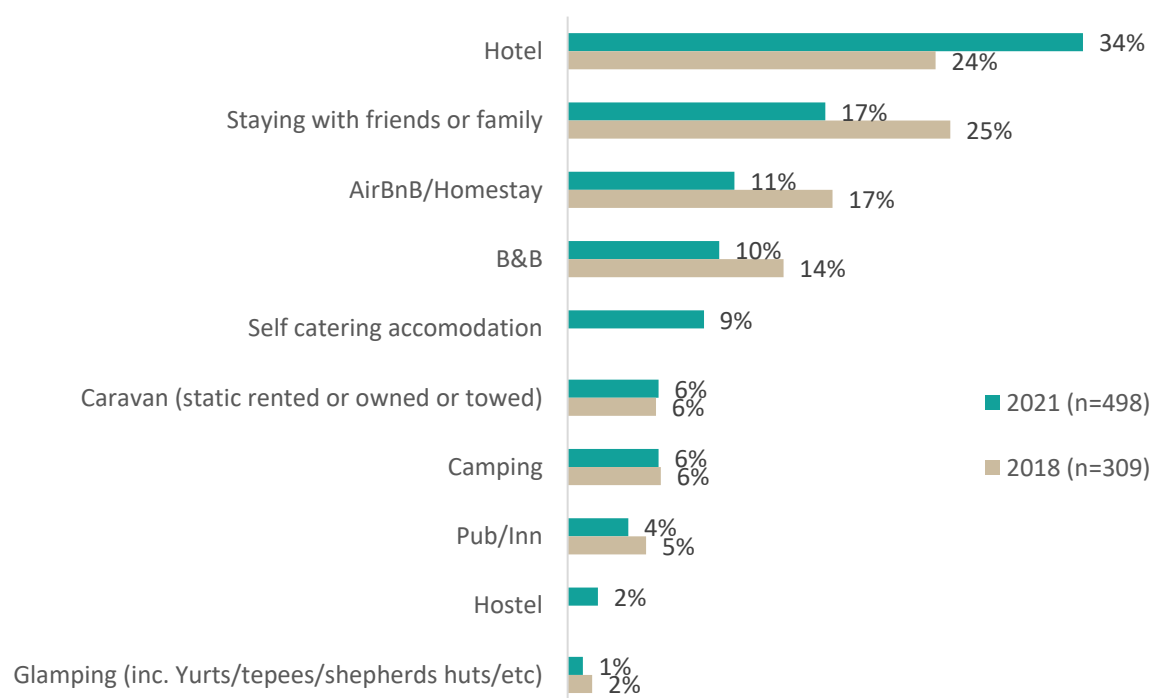
Table 7 shows that hotels are the most common accommodation type used by those staying within **and** outside the National Park. For those staying **overnight outside the National Park** 'staying with

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[2] Excluding the proportion of respondents who were staying with friends and family.

friends or family' (20%) and **'AirBnB/Homestay'** (14%) were the next **most common** choices. For those **staying within the National Park** there is a bigger emphasis on camping and hostel usage.

Table 7: Accommodation choice by overnight stay location

		Overnight visitor (staying within the National Park) (n=226)	Overnight visitor (staying outside the National Park) (n=272)
Paid accommodation	Hotel	34%	34%
	B&B	12%	9%
	Pub/Inn	6%	2%
	AirBnB/Homestay	8%	14%
	Caravan (static rented or owned or towed)	5%	8%
	Self-catering accommodation (cottage, unit, etc)	10%	9%
	Glamping (inc. Yurts/tepees/shepherds huts/etc)	1%	1%
	Camping	9%	3%
	Hostel	4%	0%
	Staying with friends or family	13%	20%

The most common locations amongst overnight visitors were the sizable urban centres of Eastbourne, Brighton and Lewes. All of the locations mentioned by 5 or more respondents are listed below alongside the counts of mentions.

Eastbourne - 39   Brighton - 18   Lewes - 13   Alfriston - 11

Chichester - 7   Winchester - 6   Midhurst - 5

Length of stay

To understand respondent habits, it's important to understand the average length of stay amongst respondents to better plan for the future. Mean scores were calculated to identify the average length of stay. **The average length of the overnight stays has fallen**, in 2018 respondents were staying for on average 4.8 nights, whilst we can see in 2021 the equivalent figure was 4.4 nights (Table 8). This could potentially affect the level of expenditure in the local economy. The overall average length of stay for those within the National Park was 3.2 nights, whilst for those staying overnight outside of the National Park the average length of stay was higher at 4.4 nights.

The table below highlights that respondents who were staying in unpaid accommodation stayed on average 1.1 nights longer compared to those in paid accommodation. This was higher in 2018, when,

on average, respondents were more likely to stay in unpaid accommodation for almost 2 nights longer than those in paid accommodation.

Within the National Park, stays of the longest duration are made by those in self-catering accommodation (6.0 nights), those staying in a caravan (5.9 nights) and those staying in an AirBnB/ Homestay (5.2).

Table 8: Average length of stay by accommodation type

	2021			2018		
	Average length of overnight stay within the National Park	Average length of overnight stay outside the National Park	Overall average length of stay	Average length of overnight stay outside the National Park	Average length of overnight stay within the National Park	Overall average length of stay
AirBnB/Homestay	5.2	3.2	4.2	6.15	5.0	5.9
B&B	3.0	2.6	2.8	3.59	2.9	3.4
Camping	3.6	2.5	3.1	5.5	1.9	3.4
Caravan	5.9	3.9	4.9	6.0	9.0	6.5
Glamping	2.5	2.0	2.3	3.0	4.5	3.6
Hostel	-	2.6	2.6	N/A	N/A	N/A
Hotel	3.3	3.1	3.2	4.02	2.7	3.8
Pub/Inn	2.8	2.2	2.5	1.75	1.6	1.7
Self-catering	6.0	4.5	5.3	N/A	N/A	N/A
Paid Accommodation	**3.1**	**4.2**	**4.2**	**3.3**	**4.6**	**4.2**
Staying with friends or family (Unpaid accommodation)	**3.2**	**3.9**	**4.4**	**4.1**	**4.7**	**4.8**
Overall	**3.2**	**3.9**	**4.4**	**4.1**	**4.7**	**4.8**
Bases	*226*	*272*	*498*	*73*	*235*	*308*

Accommodation spend

Respondents were asked what their average spend for accommodation was during their stay and how many people it covers so that the accommodation spend per person per night could be calculated. **Average accommodation spend for respondents was just over £51 per night** per person with no variation evident between those staying within the National Park and those staying outside it (Table 10). Compared to 2018, accommodation spend per person, per night has risen by £12 outside and by £9 within the National Park. While there was likely to be some inflationary uplift within these differences, it should be noted that the distribution of accommodation types used by respondents in 2021 is not consistent with that recorded in 2018 (with the choices of hostel, self-catering and staying with friends or family not present in the 2018 report). A different mix of accommodation choices is likely to play out into these costs.

Respondents were also asked how much money they intend to spend while in the National Park, excluding accommodation costs. Overall, respondents were planning to spend on average £35[3] (based on a sample of 1,595). Average spend per person amongst all respondents and their group members, the average spend per person for non-accommodation spends was £15.30. This is up from the average spend per person in 2018 of £12.31 and £9.97 in 2015[4] .

Table 10: Accommodation spend per person per night (All staying overnight)

	Average £ per person per night		Change
	2018	**2021**	
Staying outside the National Park	£39.13	£51.86	£12.73 ⬆
Staying within the National Park	£42.19	£51.38	£9.19 ⬆
Overall	**£39.91**	**£51.62**	£11.71 ⬆
Bases	*308*	*498*	

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[3] Based on the calculated mean
[4] Per person average calculated by taking total number of people including group members and dividing by the total spend.

Table 11 presents the average accommodation spend per person per night by accommodation type for the most recent survey period. With the exception of camping, caravanning and self-catering accommodation types, **the average spend per person per night is consistently higher inside the National Park compared to those staying outside the National Park**.

Table 11: Accommodation spend per person per night by accommodation type

		Average £ per person per night					
		AirBnB/ Homestay	B&B	Camping	Caravan	Hotel	Self-catering
2021	Staying outside the National Park	£41.89	£49.93	£20.42	£17.65	£65.53	£56.55
	Staying within the National Park	£60.32	£56.51	£9.78	£8.31	£71.56	£41.92
	Overall	**£51.10**	**£53.22**	**£15.10**	**£12.98**	**£68.54**	**£49.24**
	Bases	*57*	*51*	*28*	*32*	*168*	*47*
2018	Staying outside the National Park	*£33.65*	*£44.32*	*£8.66*	*£15.09*	*£50.66*	*N/A*
	Staying within the National Park	*£45.31*	*£47.44*	*£9.00*	*£8.83*	*£60.63*	
	Overall	*£36.57*	*£45.03*	*£8.85*	*£14.05*	*£52.27*	
	Bases	*53*	*44*	*19*	*18*	*74*	

Mode of transport

All respondents, regardless on their visitor type, were asked what mode of transport they used to get to the National Park. Eight in ten (81%) said they **either used a petrol/diesel private vehicle** (77%) or, a **private electric vehicle** (4%). This compares to 77% in 2018 who used a private vehicle, although the last survey did not give a petrol/diesel and electric split. **Walking has become a more popular choice** amongst respondents when compared to 2018 (11% cf. 7%), although the proportion using a bus or coach service has dropped (4% cf. 8%), which may be down to the impact of COVID-19.

Figure 13: What mode / modes of transport did you use to get here today?
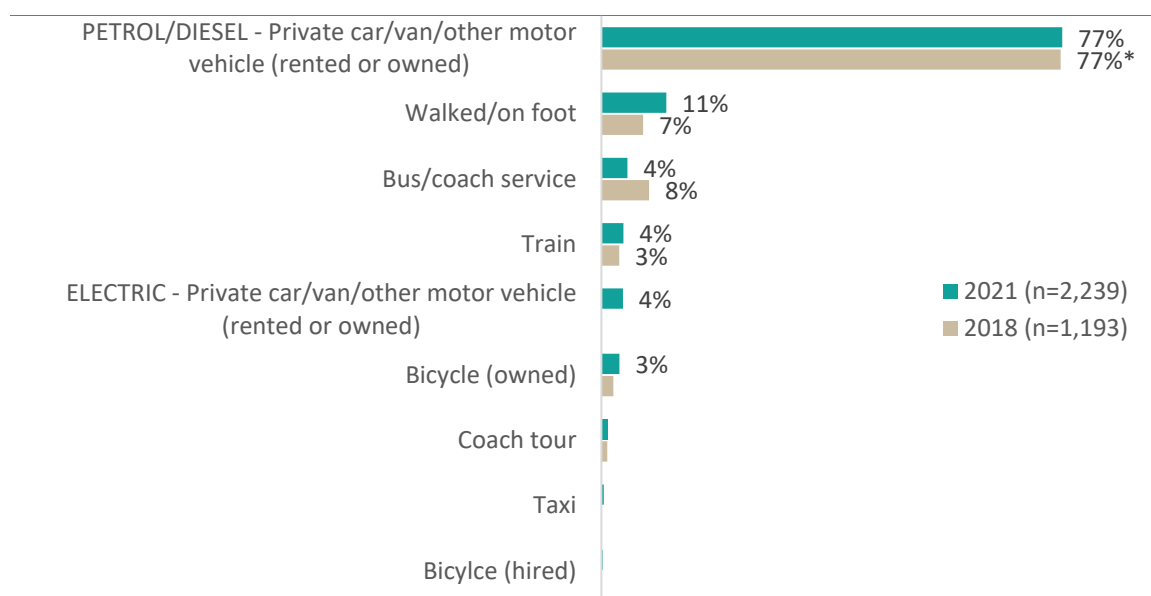
This is based on all those saying 'private car/ van/ other motor vehicle' – there was not a fuel/ electric split in the 2018 survey.

Sub-group analysis shows there were variations by location:

> o Further analysis by location shows there were variations in how each site was reached. In all but one instance (Lewes) a petrol or diesel private vehicle was used by a majority of respondents at each site. Those in **Lewes** were most likely to **use the train** (22%) compared to other sites. However, **there were particular sites that seemed particularly reliant on vehicular access** – namely **West Walk** (95%), **Blackdown** (93%), **Old Winchester Hill** (93%), **Harting Down** (92%), **Alice Holt Country Park** (91%) and **Pulborough Brooks** (91%). There is some evidence that reliance on private cars has slightly dropped, with levels of usage in 2018 extremely high in Harting Down (98%), Alice Holt Country Park (99%) and Pulborough Brooks (99%). Due to the geographical location of these areas, public transport links are generally less accessible compared to those areas in the east of the National Park, which explains the increased reliance on private transport.
>
> ▪ Other key variations evident are:

- Visitors to Truleigh Hill (45%), Winchester City Mill (26%), Alfriston (25%) and Petersfield Heath (25%) were **most likely to say that they walked** to these locations

- **Access via Bus or Coach** was highest amongst those at Birling Gap (15%) and Seven Sisters (14%).

- **Trains** were much more likely to be used amongst areas where private car usage is smaller – this is likely to be down to closer train station access reducing the need to use a private car. Those visiting **Lewes** (22%) were most likely to use this method of transport.

Table 12: Top 3 mode of transport by location

	Fuel – Private	Walked/on foot	Bus/coach service	Train
West Walk (n=60)	95%	2%	-	-
Blackdown (n=115)	93%	3%	-	-
Old Winchester Hill (n=102)	93%	2%	-	-
Harting Down (n=100)	92%	1%	-	-
Alice Holt Country Park (n=125)	91%	3%	1%	-
Pulborough Brooks (n=107)	91%	3%	-	2%
Kingley Vale (n=50)	88%	4%	-	-
Petworth n= (90)	87%	7%	2%	2%
QECP (n=115)	83%	7%	-	6%
Arundel (n=123)	80%	10%	2%	-
Cissbury/Chanctonbury (n=70)	80%	7%	-	-
Butser Hill (n=74)	78%	7%	1%	4%
Midhurst (n=117)	76%	21%	2%	-
Seven Sisters (n=156)	76%	13%	14%	10%
Devil's Dyke (n=106)	73%	9%	10%	2%
Birling Gap (n=115)	72%	9%	15%	5%
Petersfield Heath (n=60)	70%	25%	-	2%
Alfriston (n=108)	69%	25%	3%	5%
Beachy Head (n=115)	63%	16%	9%	7%
Ditchling Beacon (n=96)	61%	15%	5%	2%
Truleigh Hill (n=56)	61%	45%	5%	9%
Winchester City Mill (n=80)	54%	26%	9%	8%
Lewes (n=99)	45%	7%	12%	22%

Overnight visitors (either inside or outside the National Park) were asked if they would be using any other forms of transport during their stay (Figure 14). A total of 110 overnight visitors mentioned a second form of transport. Amongst this sub-group the dominant response was that they would also **walk/travel on foot** (57%).

Figure 14: What other modes of transport have you used / will you use during your stay

Mode	Percentage
Walked/on foot	57%
PETROL/DIESEL - Private car/van/other motor vehicle (rented or owned)	15%
Train	14%
Bus/coach service	9%
ELECTRIC - Private car/van/other motor vehicle (rented or owned)	5%
Coach tour	3%
Bicycle (own)	3%
Taxi	2%
Bicylce (rented)	1%
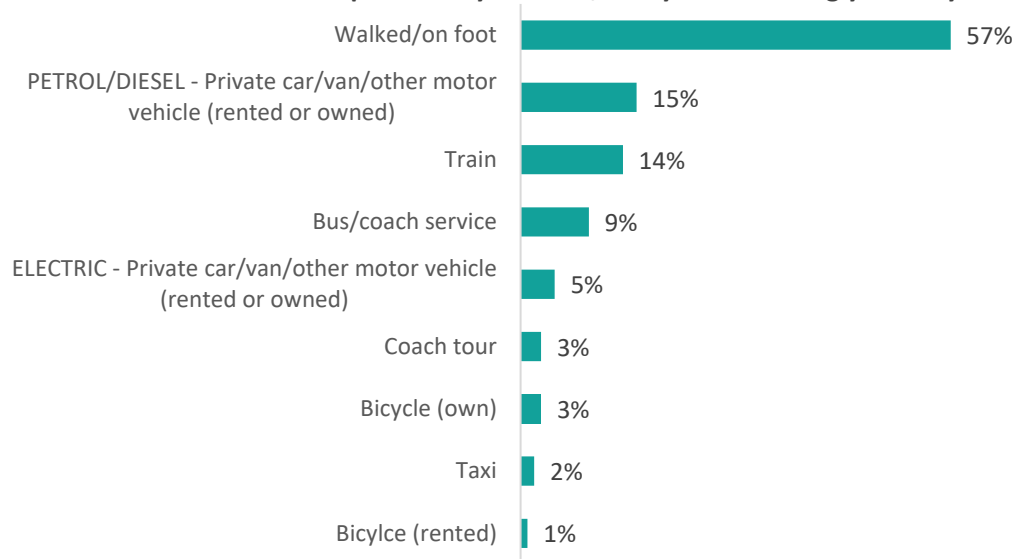
Sample base: 110

Plans while visiting the South Downs National Park

All respondents were asked what they were planning on doing during their visit to the National Park that day. **Going for a walk** (64%) and **visiting a café/ pub or tearoom** (33%) were the most common activities. These were the same two most popular activities that were recorded in 2018. However, **the proportion anticipating visiting a café/pub team room is down by 17% since 2018**. This and a drop in other indoor activities such as going shopping and visiting a historic house or museum could be a result of individuals assessing and mitigating COVID-19 risks. The changing mix of interviewing locations relative to 2018 could also be a factor here. There is little to indicate that there is a financial aspect impact activity spend when comparing the cost of overnight stay amongst respondents. Respondents spending over £50 for hotels, Airbnb's, B&B's or glamping are not significantly less likely to be doing less of any indoor activities which may occur more spending.

Figure 15: What do you plan to do on your visit to this area today?
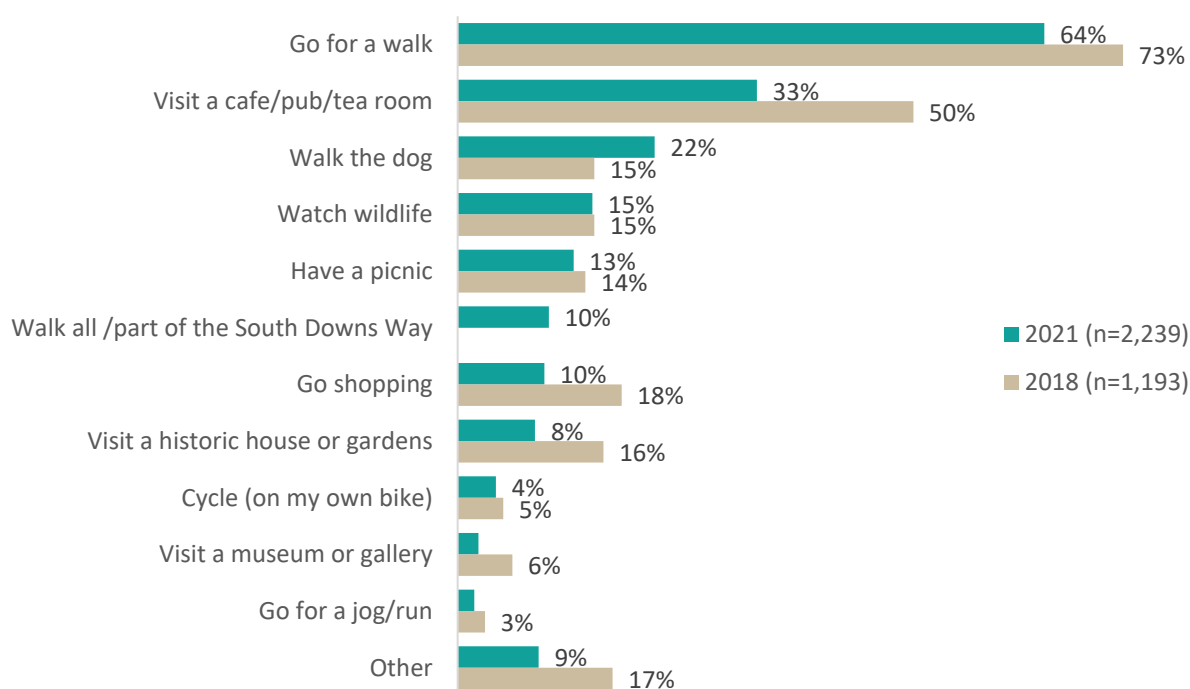
Sub-group analysis shows there were variations by location:

- When comparing planned activities by location:
  - **Visiting café/pub/tearooms** is potentially a key draw for respondents visiting **Alfriston, Birling Gap, Seven Sisters, Queen Elizabeth County Park and Truleigh Hill** in particular.
  - Respondents visiting **Pulborough Brooks, Seven Sisters, Alfriston, Cissbury/Chanctonbury and Birling Gap** were those most likely to be planning

to **watch wildlife**. In this context it would be interesting to assess whether these sites have a particularly strong offer in terms of wildlife/biodiversity.

Table 13: Key activities planned by location (top 5 highlighted)

	Go for a walk	Visit a cafe/pub/ tearoom	Walk the dog	Watch wildlife	Have a picnic
Seven Sisters (n=156)	94%	54%	16%	44%	18%
Birling Gap (n=115)	93%	61%	11%	24%	6%
Alfriston (n=108)	85%	77%	11%	41%	15%
Beachy Head (n=115)	84%	34%	7%	14%	8%
Devil's Dyke (n=106)	83%	43%	16%	8%	8%
Ditchling Beacon (n=96)	81%	31%	26%	7%	16%
Old Winchester Hill (n=102)	80%	2%	28%	8%	6%
Alice Holt Country Park (n=125)	77%	42%	20%	14%	44%
Cissbury/Chanctonbury (n=70)	71%	7%	39%	39%	17%
Pulborough Brooks (n=107)	70%	39%	12%	74%	36%
Petersfield Heath (n=60)	60%	35%	28%	2%	12%
Petworth (n=90)	58%	46%	3%	2%	4%
Butser Hill (n=74)	57%	4%	27%	4%	46%
QECP (n=115)	51%	53%	31%	1%	10%
Harting Down (n=100)	50%	9%	25%	1%	17%
Arundel (n=123)	46%	44%	7%	2%	2%
Lewes (n=99)	45%	10%	1%	1%	1%
Kingley Vale (n=50)	44%	2%	42%	-	-
Midhurst (n=117)	44%	17%	25%	-	1%
Truleigh Hill (n=56)	43%	48%	25%	14%	13%
Winchester City Mill (n=80)	40%	40%	-	-	1%
West Walk (n=60)	37%	-	70%	5%	3%
Blackdown (n=115)	33%	1%	63%	4%	3%

Overnight visitors were asked what other activities they were planning to do during the remainder of their visit to the area (Figure 16). In response, **visiting a café, pub or tearoom** (50%) and **going for a walk** (32%) were again the **most common activities**, followed by those saying they are going **shopping** (28%).

Figure 16: What else do you plan to do in the area for the rest of your trip? (Overnight visitors)

Activity	Percentage
Visit a cafe/pub/tea room	50%
Go for a walk	32%
Go shopping	28%
Visit a historic house or gardens	18%
Watch wildlife	14%
Walk all /part of the South Downs Way	12%
Visit a museum or gallery	12%
Walk the dog	7%
Have a picnic	6%
Go for a jog/run	5%
Cycle (on my own bike)	2%
Visit a vineyard	1%
Cycle (on a hired bike)	1%
Other	5%
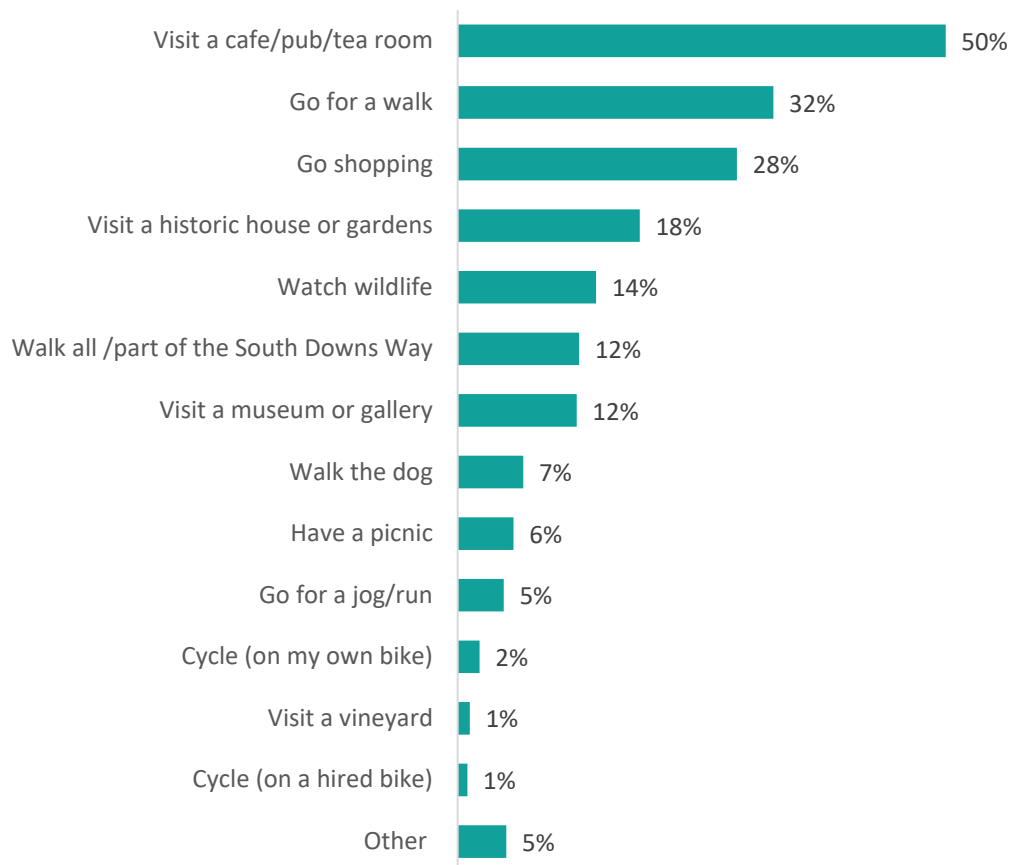
Sample base: 406

Sub-group analysis shows there were variations by location:

- When comparing other planned activities respondents have by location:

    o **Visiting café/pub/tearooms** is potentially a key draw for respondents as a secondary activity in **Lewes (73%),** as well as **Seven Sisters (66%)** and **Petworth (60%)**.

    o Those visiting **Seven Sisters** were most likely to say they would be going for a walk (91%) as a secondary activity, whilst those in **Old Winchester Hill (58%)** or **Birling Gap (35%)** were most likely to state they would be watching wildlife.

Table 14: Key activities planned by location (top 5 highlighted)

	Visit a cafe/pub/tea room	Go for a walk	Go shopping	Visit a historic house or gardens	Watch wildlife
Lewes (n=93)	73%	17%	49%	18%	5%
Seven Sisters (n=32)	66%	91%	16%	6%	16%
Petworth (n=25)	60%	16%	12%	36%	8%
Alfriston (n=25)	52%	68%	48%	12%	12%
Birling Gap (n=20)	50%	20%	65%	60%	35%
Midhurst (n=20)	50%	45%	60%	30%	0%
Beachy Head (n=48)	46%	42%	13%	15%	10%
Devil's Dyke (n=31)	45%	29%	19%	19%	10%
Old Winchester Hill (n=40)	13%	8%	0%	0%	58%

Resources when planning your visit

To understand if and how respondents planned their visit, all respondents were asked if they used any resources to plan their trip or used anything that influenced their choice (Figure 17). Just under half (49%) of respondents said **previous knowledge of the area was used** to plan their trip or made their decision to visit. Just under one in five (18%) used a **Google** search, whilst 12% said through '**word of mouth**'. In this iteration of the survey, the online option was broken down into multiple answer choices compared to a general online answer option used in 2018. This means that a limited comparison can be made due to the varying options listed in both surveys.

Figure 17: What resources did you use to plan your trip or influenced your choice/decision to visit?

Resource	Percentage
Previous knowledge of site/area	49%
Google search	18%
Word of mouth	12%
Other internet/website	6%
Paper mags (e.g Ordnance Survey)	5%
Information leaflets	3%
Magazines (e.g. National Trust)	2%
Apps (please specifiy which ones)	2%
Facebook	1%
Other	4%
None of these	17%
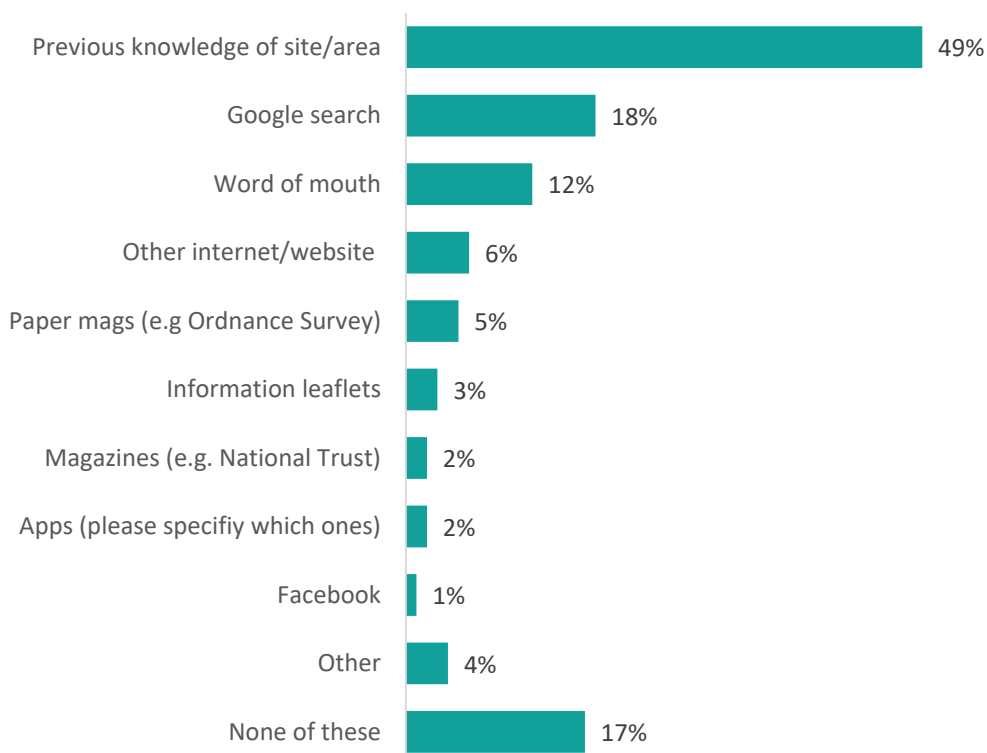
Sample base: 2,239

Sub-group analysis shows there were variations by ethnicity:

- Comparing the results by ethnicity, **BAME respondents were less likely to have previous knowledge of the area** compared to Non-BAME respondents. In contrast, **BAME** respondents were **more likely to source information via the internet**. This is important as in the most recent survey period there has been an increase in the diversity of first-time visitors and it is therefore important to make sure there is up to date, relevant online content for respondents coming to the site for the first time.

Figure 18: Resources used by ethnicity

■ Previous knowledge of site/area ■ Google search ■ Other internet/website

Non-BAME (n=2,145)
- 50%
- 17%
- 6%

BAME (n=80)
- 26%
- 39%
- 13%
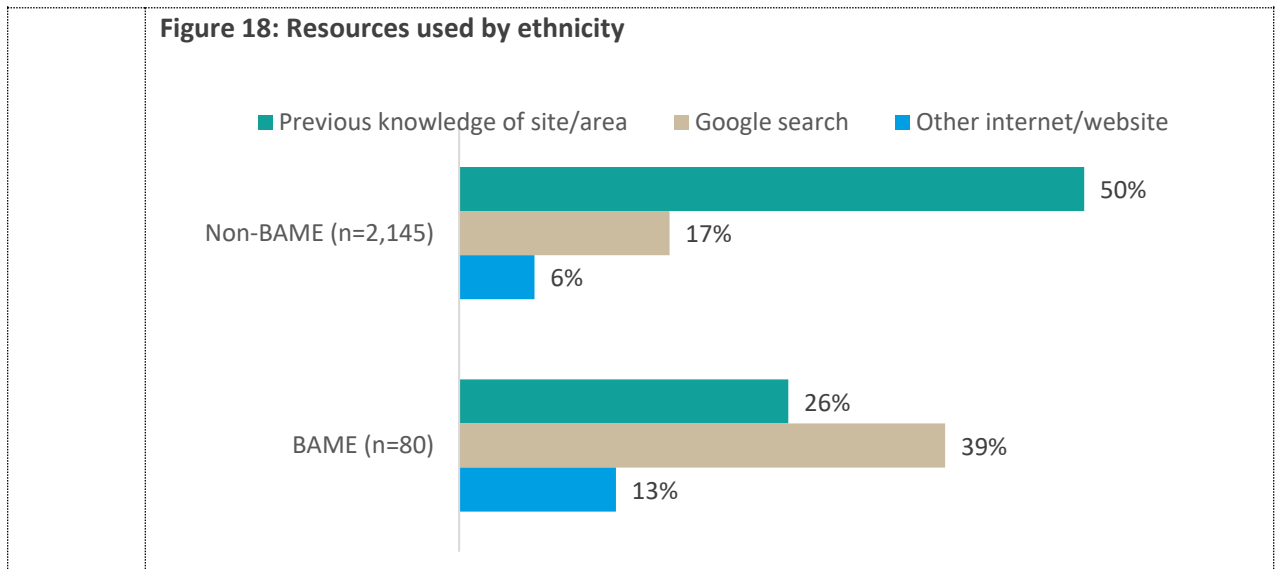
Previous knowledge of a site was the most common resource used amongst local respondents (68%). As may be expected, overnight visitors were less likely to be able to rely on previous knowledge compared to those that live in the area. Figure 19 outlines the most common sources of information among local respondents vs. overnight respondents, i.e. those with the greatest potential to positively impact the National Park economy. **Online searches and word of mouth** appear to be more prominent for overnight respondents compared to local respondents. Given the prevalence of word of mouth in shaping decisions, the fact that this research is showing extremely positive respondent feedback, is of even greater significance. It is also worth noting that 23% of local respondents cited 'none of these' as an option, compared to 13% of overnight respondents.

Figure 19: Key information planning resources by visitor type (Overnight respondent combined)

■ Local resident (n= 777) ■ Overnight visitor (n= 623)

	Previous knowledge of site/area	Google search	Word of mouth	Other internet/website	Apps
Local resident	79%	5%	5%	3%	3%
Overnight visitor	14%	32%	14%	12%	2%
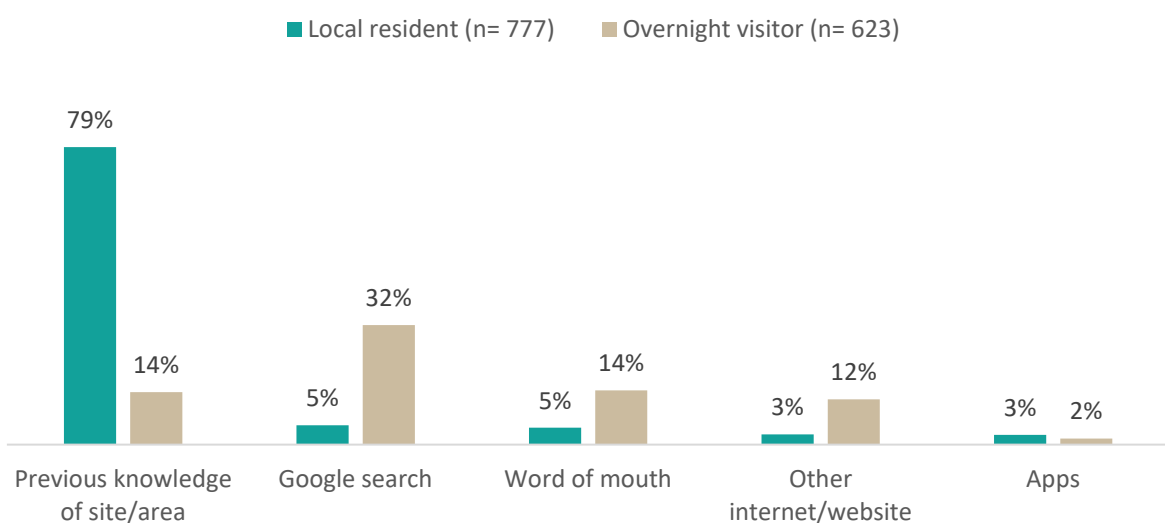
Section 4: Enjoyment and Impact of COVID-19

Overall enjoyment

Respondents were asked how they would rate the level of overall enjoyment when visiting the South Downs National Park (Figure 20). **Most respondents** (98%) **rated their enjoyment as either 'very high'** (69%) **or 'high'** (29%). Compared to 2018 the proportion of respondents providing an overall positive score has remained consistent, although there has been an increase in the most recent survey period in the proportion stating 'very high' from 64% in 2018 to 69% in 2021. Levels of high enjoyment can be observed in all locations, ranging from 100% enjoyment amongst those visiting Alfriston, Petersfield Heath, West Walk, Kingley Vale, Lewes, Arundel, Alice Holt Country Park and Pulborough Brooks, to 94% for respondents visiting Midhurst.

Figure 20: How would you rate your level of overall enjoyment of your visit to this part of the South Downs National Park so far today?
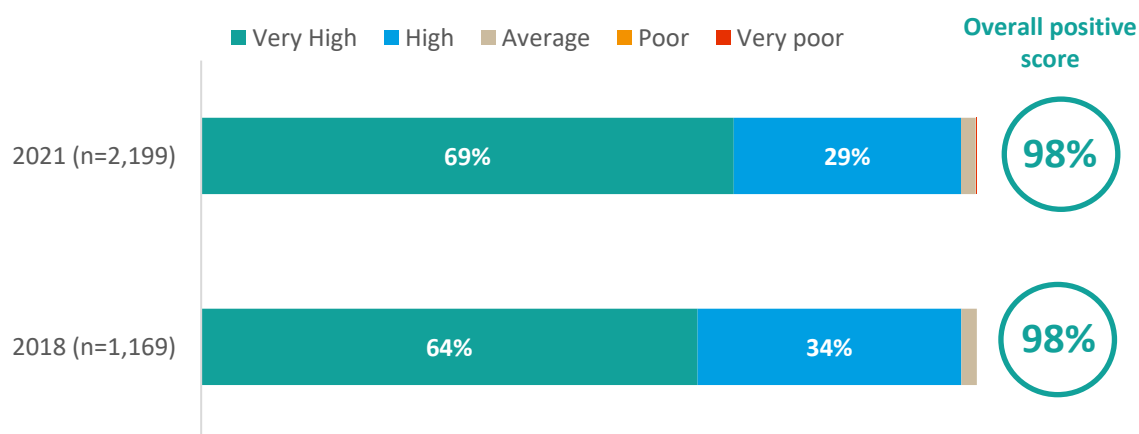
Reasons for enjoyment

When asked what factors contributed to their enjoyment during their visit to the South Downs National Park (Figure 21), **enjoying the fresh air** (68%), the **scenic landscape** and breath-taking views (65%) and **the nature/ wildlife** (51%) were the main reasons. Note that the list of explanatory factors presented to respondents for this question was revised in 2021, meaning that a direct comparison to 2018 is not possible.

Figure 21: What factors contributed to your enjoyment of your visit to this part of the South Downs National Park today?
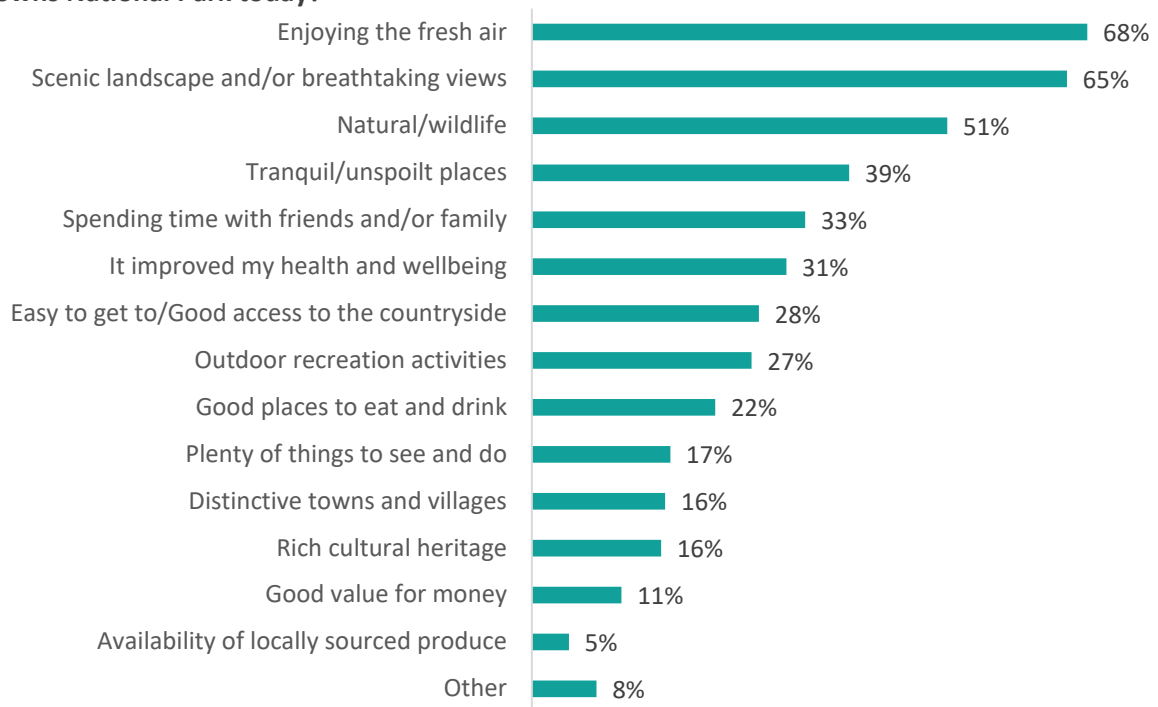
Sample base: *2,239*

There were no variations by sub-groups.

To help South Downs National Park Authority understand how they can improve the visitor experience all respondents were asked, what, if anything, would have made their visit that day more enjoyable (Figure 22). A total of 1,132 respondents made one or more suggestions. These suggestions were broad ranging and so that the insight that they provide is not lost, the suggestions made per site are provided in Appendix C of this report. The most commonly mentioned themes were **facilities being improved or open more** (11%), **better signage and information** (11%), **parking issues** (8%), **toilet facilities** (7%) and **dog control and fouling** (7%). The other comments (18%) shown in the figure below are those that cannot easily be categorised or are beyond SDNPA control such as: less wind, more sunshine, better weather.

Figure 22: Suggestions for visit improvements

Suggestion	%
Facilities to be better/open/more	11%
Better signage/information	11%
More/better parking	8%
More/ improved toilets	7%
Dog control/fouling	7%
Affordability	6%
Comments on site specific attractions	5%
More bins/ less Rubbish/litter	4%
Seating/picnic areas e.g. more benches	4%
Less traffic /congestion	4%
Improved refreshments/catering	4%
Improved routes/paths	2%
More/other attractions	2%
Walking/cycling comments	2%
Roads/highways/pedestrian areas	2%
Transport comments	1%
Positive comments	1%
Barriers/fencing/gate comments	1%
Reduced crowds/ fewer people	1%
Other	18%

Sample base: 945

An example of some comments can be seen overleaf:

Facilities to be better/ open more

"Not enough quality restaurants especially for evenings."
"More place to be open."
"Market closed too early, 1.30 is too early."
"A local market somewhere near."
"More cafes, less expensive ones."
"Better kiosk."

Better signage/ information

"Car park not clearly marked out needs to be easier."
"Better marked maps/clear signage for trails."
"Make better signage without spoiling [the area]"
"More information on nature of what might be seen."
"More up to date route planning information on site."
"Better signs for disabled access."
"Improve signs on walks."

More/ better parking

"More understandable [easy to use] parking machine."
"Better parking - metres hard to understand."
"Having to get a ticket to park even though National Trust number."
"Potholes need sorting out in car park."
"If the parking was cheaper."

Impact of the COVID-19 pandemic

Respondents were asked **How important being outside in a natural environment had become to them since the outbreak of COVID-19** (Figure 23). Just over **two fifths** (43%) of respondents said that **being outside in a natural environment has become more important** to them since the pandemic, while 57% said that it remains as important as always.

Figure 23: How important has being outside in a natural environment become to you since the outbreak of COVID-19?

Become more important 43%

As important as always 57%

Sample base: 2,239

Sub-group analysis shows there were variations by disability and ethnicity:

- Although not statistically significant, respondents with a **long-term illness or disability** were **more likely to feel that the outdoors has become more important** as a result of the pandemic compared to those with no disability (48% cf. 42%).

Figure 23: The importance of being outdoors by disability

■ Become more important
■ As important as always

	Become more important	As important as always
No disability (n=2,030)	42%	57%
Those with a disability (n=192)	48%	52%

- Comparing the results by ethnicity, the importance of **being outdoors** since the pandemic has become **significantly more important for those from a BAME background** (55%) compared to those classified as non-BAME (42%).

Figure 24: The importance of being outdoors by ethnicity

- Become more important
- As important as always

	Become more important	As important as always
Non-BAME (n=2,145)	42%	58%
BAME (n=80)	55%	45%

Ultimately, Covid-19 has had a profound impact on people's abilities to travel over the last two years, and the impact on tourism in the South Downs National Park is no different. Whilst habits of respondents have altered since 2018 in terms of their time spent at the National Park, where they stayed and how they got there, the fact remains that the South Downs National Park remains a popular destination for a break away or simply a day out, with many things on offer for people both locally and from further afield.

Appendix A: Suggested improvements from visitors

All respondents were invited to make up to three suggestions regarding how their visit could have been improved. The suggestions are provided per site in the table below.

Alfriston

Verbatim
A local market somewhere near
Better hotel
Better weather earlier in the day
Car park - no vision
Car park machine broken
Clearer signage on walks/pathways
Clergy house closed
Fewer cars in village centre
Fewer people
Free parking
Gates need attention
Getting a table at badgers
Getting up earlier
Improve pathways
It has been explained it is to protect the insects by a local
Less parking on pavements
Less space for cars and more for pedestrians
Less traffic
Less traffic
Less traffic
Loads of roadworks
Maintenance of bridleways
More car parks in area
More dustbins
More pubs
More sunshine
More tourist information
Moving street lights after night in the high street
No mention of covid
No public toilets
Not so expensive here
Parking a bit tricky
Petrol easier to buy
Petrol please
Public toilets

Repairs to footpaths
Shop we wanted was closed
Slower traffic
Speed of traffic
The weather
To live here
Too many cars in high street
Use a taxi more

Alice Holt Country Park

Verbatim
A few more tables in the shade
Archery back
Be able to take the dog in the cafe when i order a drink etc
Better marked maps/clear signage for trails
Better signage
Bike hire open
Car park not clearly marked out needs to be easier
Cheaper cafe prices
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Clear signage for parking in car park
Clear signs of trails
Couldn't find the Gruffalo
Dog bins available
Easy dog walk
Family
Family
Free parking
Free parking
Free parking
Free parking for disabled
Good place to relax
Good weather
If the parking was cheaper
Limit people coming in during school holidays
More bins
More bins around
More definitive trail
More dog bins
More dog facilities

More Gruffalo statues
More picnic areas in the shade
More shade in the picnic areas
More signage and information generally
More tables needed in the shady areas
More vegan options in the cafe healthy options
Need more dog bins around
Needs dog bins around the area
Nothing
Pond trails didn't follow map
Reduce car parking fee
Reduce price of parking
Sunny
Sunshine
Time
Time
Trail sign posts
Weather
Weather

Arundel

Verbatim
Water area for kids
Access to castle gardens
Art trail not usual standard
Better connections to Chichester
Better parking
Better parking
Better parking
Better parking
Better parking - metres hard to understand
Better parking and less cars
Better public transport
Better roads and parking
Buskers all gone, would prefer more
Castle bit expensive
Castle closed and not advertised that it is
Castle not shut
Castle pricing - no concessions
Castle pricing cheaper
Castle too expensive
Cheaper castle entry
Disabled parking
Dog accessibility

Festival not at usual standard
Get rid of campervans on mill road
Go in castle grounds for less
Lack of bins
Less cars
Less crowds
Less rats
Less traffic
Less traffic - lots of roadworks
Less traffic coming
Longer free parking
Lots of things shut
More accommodation
More antique shops
More dog bins
More food stalls
More masks inside
More parking
More parking
More parking
More parking
More parking
More parking
More parking
More public toilets
More shops
More stalls
More toilets
On the walk wildflowers amazing but leaflet doesn't identify them
Park and ride
Parking better
Parking better
Pedestrianised always
Pedestrianised always
Play areas for older children
Poo bins
Prices (bus/admission) too high
Prices food etc quite high
Public toilets better
Reduction in traffic
Signage of town outskirts could be better
Traffic
Zip line

Beachy Head

Verbatim
A few more benches
A long time - traffic roads single lane
Address traffic jams
Benches for older people
Cafe at burling gap grim
Cafe could be improved
Cafe needed
Certain places to get drink and food
Cheaper car park
Cheaper hotels
Cheaper parking
Chef in kitchen
Cigarette butts
Credit card/contactless
Cup of coffee
Cycle tracks
Dead fish
Do not pay for parking at new forest
Facilities and pub should be open
Free parking
Info difficult to access
Lighthouse not open public
Litter
Market it better signage without spoiling
More accessibility
More benches
More benches
More benches
More public transport
More research
More seating on walk towards burling park
No ticket is good
Not enough accommodation in school holidays
Open pubs earlier
Open the pub
Open the pub
Open the pub
Opportunity for a drink
Pick up litter
Pub being open
Pub closed no cup of tea
Pub open
Pub should be open

Quicker cup of coffee
Rope swing on a tree
Scruffy farm
Signage
Signage
Signposts not clear
South downs near Devils Dyke had few parking places only national trust some parking closed
Still unspoilt
Street clean
Styles and tracks need paving
Sunshine
Tea room
Toilets at sisters shut
Too much fencing
Use app for car park
Weekends so busy
Where is the tearoom

Birling Gap

Verbatim
Banning ghetto blasters
Better seating
Better weather
Better weather
Cafe not open
Cars park in road
Clearer signs
Dog fouling
Expensive
Fewer flies
Fly infestation
Food expensive
Have a public house nearby
Hot bacon sandwiches
Hotel affordable
Inconsiderate parking
Information
Information on walks
Lack of bins
Less flies
Less flies
Less people
Less wind

Less wind
Less wind
Less wind
Less windy
Less windy
Litter bins
More access to beach as one is very very busy
More benches
More seating outside
More sun
More sun
More translation
No flies
No recycling
No signal
Not much choice for lunch
Not so windy
Not tidy
Park and charge
Places closed
Poo bins and advice
Road works
Signage on tracks
Some sunshine
Sunshine
Sunshine again
Too busy and not real sign information
Too many cars
Traffic - less
Trail information clearer
Translation
Translations
Trays need clearing

Blackdown

Verbatim
Available poo bins
Benches
Benches
Bins
Cafe or kiosk
Cafe or kiosk somewhere
Car park more cars
Coffee hut

Coffee hut
Coffee shop
Dog bins
Dog bins
Dog poo
Dog poo bin
Dog poo bins
Dog poo bins
Dog poo bins
Dog poo bins
Dog poo bins needed
Dogs under control
Ice-cream station
Less dog poo
Less people
Litter
Litter bins
Manage area for RSPB wildlife
Mark the road to Blackdown with signs
More blackberries
More disability access for wheelchairs
More dog bins
More dog poo bins
More dog poo bins
More dog poo bins around
More signs
Nice coffee van on site
People pick up dog poo
Poo bins
Poo bins
Poo bins
Poo bins
Poo bins
Poo bins in car park
Potholes need sorting out in car park
Potholes repair in car park
Public amenities
Rubbish bins
Rubbish bins
Rubbish bins needed
Seats
Signs to say pick up your dog poo
Silver birch trees taking over
Sunshine
The potholes need to be repaired driving up
Toilets

Butser Hill

Verbatim
Benches on top of hill
Better kiosk
Better kiosk
Better kiosk
Better kiosk at top of hill
Better to find
Better toilets
Better toilets
Bring a dog
Car parking too expensive
Cheaper parking
Decent toilets
Dog poo not picking up
Free car park
Free parking
Garden care
Information at top
Less hot for dog
Maintenance for footpaths
More benches
More benches
More benches and places to sit
More benches on hill
More consistent signs
More dog bins
More dog poo bins
More dog poo bins
More dog poo bins
More dog poo bins
More facilities at top
More for younger kids
More loos
More segregation of bikes
Parking
Parking expensive
People parking off road
People pick up dog poo
Play area
Signage
Strimming footpaths
Toilets

Toilets
Toilets
Toilets not working
Toilets open
Toilets working
Water taps
Weather

Cissbury/Chanctonbury

Verbatim
Better local information
Bikers do not pay attention
Bins
Clear up dog mess
Consideration of dog walkers
Control of dogs
Control of some dogs
Dog bins in car park
Dogs of out of control
Explanation of area of SDNP and nt
Information
Information sign
Information summary
Keep free for dogs
Litter and dog bins
Local information
More information
More parking
More poo bins
More signage information
Number of dogs roaming off lead
Other cyclist awareness of all shared space
Parking
People need to clear rubbish
People take away poo bags
Poo bags
Poo bags
Poo bags
Poo bins
Rubbish bins
Seating
Signage
Signage
Signage

Slippage on undergrowth
Some pathways not cut back
Struggle in car park
Too many fences
Wood benches at top of ring to enjoy scenery
Would be great for poo bins

Devil's Dyke

Verbatim
Access to toilets
Access to toilets
Available toilets
Better pub experience
Better signage
Better signage from Upper Beeding
Better signage on cycle paths
Bus back to hove
Choice of coffee
Cold water tap
Easier parking
Few stops for the loo
Footpath disintegrated at last junction
Free car park
Free car park
Free parking
Keeping the paths clear
Lack of toilet facilities
Leaflets
Less litter in car park
Less people
Less wind
Less wind
Litter bins
Loo access
Maybe compost toilets
More benches
More daily buses
More dog bins
More for vegans etc
More information about transport
More parking
More seating
More sun

More sunshine
More toilets
More toilets
More toilets
More up to date route planning information on site
More viewing seats
More way points
Nicer weather
No charge at car park
Only just starting
Overflowing rubbish
Parking a struggle
Pub being open
Pub being open
Pub being open
Pub being open
Pub being open
Pub being open
Pub looking tired
Pub open
Public toilets
Sign posting improved/words highlighted
Signposting
Sunshine
Sunshine
Sunshine
Sunshine
Sunshine
Toilet access
Toilets
Toilets
Trains that don't get cancelled
Upgrade the paths
Warmer
Way markers disappeared
Wildlife info signs

Ditchling Beacon

Verbatim
Access to better parking facilities
Bins
Bus information
Dog poo bins/litter patrons
Expensive to park
Fixing boggy spots in winter
Free car park
Gates not shown on maps
Good signposting
Lack of signage
Less cyclists
Maps sorted out
More availability of public transport
More benches
More bins
More bins
More information boards
More obvious walks guided
More poo bins
More refreshment facilities
More seating areas spread out
More toilets
More wildlife
National trust book wrong postcode
Parking issues
Promoting volunteering opportunities
Regulate traffic
Running water tap
Sign posting
Signage more details
Small cafe
Stopping oil exploration on south downs
Toilet
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Traffic noise
Water taps more of them

Harting Down

Verbatim
A bin
Being allowed to stay overnight with horses
Better signs to car park
Better simple guide for area
Better value pubs
Bike rack for car park
Bin
Cafe
Car park better
Carpark needs work
Clearer signs
Cyclists
Dogs on leads
Easier parking
Easier parking
Free parking
Free parking
Free parking
Good bus on the way
Having to get a ticket to park even though NT member??
Highland cattle grazing
Improve signs on walks
Kiosk
Kiosk
Kiosk
Kiosk
Kiosk maybe
Kiosk/cafe
Less dog poo
Less dog poo on paths
Less people
More benches at view point
More bins
More poo bins
More sun
More sun
More sun
More viewpoint borders
Not paying for car park
Parking machine broken
Picnic benches
Place to get food and drink
Refine foods

Resurface car park
Rubbish bins
Security
Small footpaths are overgrown
Some gates swing back too quickly for horses
Somewhere to get coffee
Sun
Sun
Tea hut
Tea room
Toilet
Toilet
Toilet facilities
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Weather
Weather
Weather
Weather
Weather

Kingley Vale

Verbatim
A rubbish bin
Bigger car park
Cameras to stop thieves
Can't see any
CCTV camera
CCTV would be good
Coffee van
Dog mess on patch
Lack of signage
Less cycles
Less fly tipping
More cycle trails
Need CCTV
Not enough parking
People clearing dog poo
People collecting their dog mess
Picnic tables
Rubbish bin

Stop cyclists riding from cp	
Take the thieves away	
Toilet facilities	
Toilets	

Lewes

Verbatim
All good
All good
All good
All good its unspoilt
All great
All ok
All ok
All ok
All ok
Ban roadworks
Better road access
Can we have more shops open on Sundays
Can't think of anything
Car parking too expensive
Cheaper parking
Cheaper parking
Could do with more places to eat
Disabled toilets closed
Don't mind paying but machines don't always work
Get some traffic away from high street
Having to pay to park
Hotel should be better it was tired
Hotels not good
Just weather
Lack of toilets
Ladies not clean
Less traffic
Less traffic in centre of Lewes
Let the dog in the park
Lots of shops are closed
M25??
Main town park
Market closed too early, 1.30 is too early
More cafes, less expensive ones
More electric charging points
More parking
More public toilets in Lewes
More signposts for tourists

More street markets
No boutique hotels
Not enough quality restaurants especially for evenings
Not enough vegan options
Not really all good
Nowhere safe to leave our electric bikes, doesn't feel safe to leave
Only the weather
Parking
Parking expensive but train even more
Parking not enough spaces
Parking very busy
Pavements too uneven
Places to eat map
Please no branded shops
Poor internet where we are staying
Public toilets closed - men's
Public toilets terrible
Road works horrendous
Sign posting could be better
Some good Chinese or Indian restaurants
Sorry to see shops closed
Toilets are filthy
Too many roadworks they are horrendous
Too much traffic in town
Town map would be good
Town map would good
Very pleased south downs have become a dark sky park

Midhurst

Verbatim
A bypass
A couple of seats on path
A swimming pool
Better affordable shops
Better shops
Bridge needs to be organised for traffic problems
Bring back market
Bring back the market
Bring back the market
Cheaper hotels
Cleaning dog mess
Fewer large lorries
Get rid of weeds on path
Less lorries

Less motorcycles screaming around
Less traffic
Less traffic
Less traffic
Less traffic calms
More buses
More crossings
More free car parking
More hanging basket
More parking spaces
More places that are open
More rubbish bins
More shops open
Noisy motorcycles
Open a bank
Overgrown paths
Postcode to TB no longer exists
Proper post office
Reduction in traffic
Sunshine
Sunshine
Sunshine
Sunshine
Sunshine
Sunshine
Swimming pool
Too many motor bikes
Traffic
Traffic
Traffic on road
Train station
Walks that were signposted
Weather
Weather

Old Winchester Hill

Verbatim
A loo
A portaloo
Be with friends
Benches
Better weather
Better weather
Child pram friendly
Cut back bushes so can see sing to old hill

Higher barrier
Larger car park
Litter bin before fort
Loo
Loos
More parking near top
More people
More seats
More seats
More seats to look at view
More signs
More sunshine
No more building
No rain
Seating so one can sit and enjoy the view
Seats
Seats
Seats closer to car park
Seats to view car park
Toilet
Toilet
Toilet
Toilet
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Toilets
Weather
Weather

Petersfield Heath

Verbatim
Band stand with line music
Better bench upkeep
Better catering
Better parking
Better parking
Better parking
Better parking

Better parking
Better parking
Better parking
Better/more parking
Bit more information signage
Cleaner toilets
Dogs on lead
Duck food dispenser
Fencing around water annoying
Fencing unkempt
Got out the islands
Less dog mess
Less people
More paths
More seats by eating area
Signs too impolite
Some fencing looks abandoned
Sometimes needles about
Toilets are bad

Petworth

Verbatim
Better bus service
Better food in cafe
Better lighting of painting
Better lunch
Better pubs in Petworth
Better signs for disabled access
Cafe at top
Cake was poor
Decent cafe at top
Easier signage on car park
Easier to use parking machine
House furnished better
Less traffic
Less traffic
Less traffic
Less traffic spoils Petworth
More antique shops
More breakfast options
More cafes with staff so could get a drink
More events
More frequent buses
More parking
More transport for disabled

More understandable parking machine
Nice cafe to sit outside
No dogs
No parking police
Outdoor eating area
Queue at cafe a pain, took 25 minutes
Toilets at the house and by cafe
Top floor of house being open
Traffic on m25
Vegetarian options at cafe

Pulborough Brooks

Verbatim
Better cafe on food selection
Better cafe selection
Better disabled parking
Better lunch
Better parking for motorbikes
Better signs on the roads
Bigger park
Cafe being better
Cafe open properly
Cafe open properly
Cafe properly open
Cafe sorted
Cafe working properly
Chairs not comfortable
Dog poo
Dogs allowed on trails
Double story - view at higher viewpoint
Good area to walk with dogs
Keep as it is
Keep peaceful
Less artificial sweetener drinks
More birds
More birds
More birds
More birds
More birds seen
More choice at cafe
More information around the whole site
More information points
More local plants
More poo bins
More wildlife

Not well signposted
People walking round helping
See more birds
See some more bins
Seeing more birds
Signage

QECP

Verbatim
Another toilet block
Better bus info
Better coffee
Better signage
Better signage
Better toilets at top
Bike wash
Bike wash
Bike wash
Camping
Car payment
Car safety (break ins)
Cheaper
Cheaper accommodation
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Cheaper parking
Clearer mapping
Clearer parking signs
Clearer route markings
Control dogs better
Disabled toilet space
Dog park see saw
E bike charging points
Expensive
Extra dog bins
Food selection
Free car park
Free ice cream

Free map
Keep walking tracks clear
Maintain pond
Map key on website
Map of trails
More cafes
More car park info
More clear trail signs
More cycle route maps
More dog bins
More dog bins
More dog bins
More dog bins
More dog bins
More dog bins
More dog bins
More free info
More gluten free food
More ice cream places
More maps at top
More marked bike trails
More recycling bins
More seating areas
More signs
More signs
More trails
More water fountains
More wooden sculptures
Old menu was better
Online map of trails
Open toilets earlier
Open toilets earlier
Parking for free up to 4 hours
Play park
Play park
Pre covid menu
Prioritise walkers
Regulation of non-bike routes
Repair toilets
Sell bike parts
Share the trail signs
Shelter
Signage
Signs for car park
Smaller options
Staffing of cafe

Stricter on bikes
You are here on all maps/signs
You are here points

Seven Sisters

Verbatim
A sunny day would have been nice
Access to drinking water on way to beach
Accommodation
Better if open
Better parking very bumpy
Better signs to alternative car park
Bigger car park
Bigger car park
Bridge connecting coastal path at Cuckmere have would help
Cafe temp closed
Could not get lunch without prior booking
Dog bins - none found
Dog poo bins
Easier parking
Easier parking
Easier parking
Easier parking
Family reasons
Fewer cars in car park
Free beer
Free coffee
Free parking
Free parking
Had our swimming costumes with us
Halfway stop for refreshments
Have dedicated exercise path
Having water points along the way
If cafe open (cafe closed due to technical reasons)
If the cafe was open (it was a temporarily closed due to technical problems)
If warmer
Less people
Less rubbish about, it's not very nice
Less wind
Less wind
Less wind
Less wind
Less wind
Less wind
More access to car parks

More benches
More benches please
More bins
More cafes
More cafes
More catering facilities along the walk
More dustbins
More information on nature of what might be seen
More parking
More parking
More parking spaces
More places in car park for visitors
More poo bins
More public toilets needed
More regular train on Sundays from London to Eastbourne
More rubbish bins
More rubbish bins available
More signs
More spaces
More sun
More sun
More sunny weather
More sunshine
More sunshine
Need lines to tell people how to park
Nice weather
Not sufficient parking as had to cross dangerous road
Nothing
Nothing
Nothing
Places to leave muddy boots
Spending more time here, we should have come earlier
Struggle to find
Sunshine
Sunshine
Sunshine
Sunshine
Sunshine would be nice
The sun
The sun coming out
The sun is nowhere
The weather
The weather
Toilets on walk
Too busy the car park is too small
Too hot for what we are wearing

Train was late
Visitor centre closed
Wanted to see the "Wryneck"
Wearing shorts so hot
Weather
Weather
Weather could be sunnier

Truleigh Hill

Verbatim
£3 child's trail map
Bad bridle paths
Better surface to car park
Cafe open - no response to ringing the bell
Complete separation of walkers and cyclists - getting dangerous
Driving off
Footpaths not good either
Free maps £2 a lot of money
Free parking
Improve bus routes
Less cyclists on dog walking areas
Less traffic noise
More benches
More benches to sit on
More info
More local resources
More seating on route
Separate bike areas
Signposted better
Take away pylons

West Walk

Verbatim
A rubbish bin
Better paths
Dogs on leads
Easy to find, car park charges on lane
Fill in pot holes
Improve some paths
Improve the entrance
Increase the signposted walks
Less fumes from van

Less mud
Litter and rubbish
More dog poo bins
More facilities
More of it
More poo bins
Open longer cp hours
Pick up rubbish
Selling food
Something for toddlers
Sunshine
Update of play area

Winchester City Mill

1st mention
Park and ride having card facility
Accommodation costs too high
All shops occupied
Better bike paths
Better cleanliness
Better cycle access
Better maps and signage
Better parking
Better parking
Better public transport
Better public transport to leisure centre
City guides
Hotel not as good as expected
Ice cream stall
Info about dog friendly activities
Less busy
Less litter
Less traffic
Less traffic
Less traffic
More bins
More buskers
More independent
More shops opened particularly lover end of shops
More vegan friendly cafes
Museum tickets on QR code
Need to do something about traffic
No city app?

Pedestrianize high street
Prices of attractions more obvious so you can plan
Signs to Chesil car par
Signs to city mill and signs in general
There no normal pubs in city centre
Too many bikes on high street
Uneven pavement is bad

Appendix B: Survey Questionnaire

SOUTH DOWNS NATIONAL PARK SURVEY 2021   Location code: .... Interviewer: ....

Date: /   /21   **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

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

Yes	1	No	2	

2. 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
This is my first visit	6

3. Visitor type: *SHOW MAP & SHOWCARD 1*

Local resident (live within 10 miles of this location)	1	Go to Q10
Day visitor (living further than 10 miles from this location)	2	
Overnight visitor (staying within the National Park)	3	Go to Q4
Overnight visitor (staying outside the National Park)	4	

4. Was this location being in a National Park a factor in your decision to visit this area?

Yes	1			No	2	

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

Write in location eg. Midhurst [   ]

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

Number of nights staying [   ]

7. In what type of accommodation are you staying?

Hotel	1	Go to Q8
B&B	2	Go to Q8
Pub/Inn	3	Go to Q8
AirBnB /Homestay	4	Go to Q8
Caravan (static rented or owned or towed)	5	Go to Q8
Self catering accommodation (cottage, unit, etc)	6	Go to Q8
Glamping (inc. Yurts/tepees/shepherds huts/etc)	7	Go to Q8
Camping	8	Go to Q8
Hostel	9	Go to Q8
Staying with friends or family	10	Go to Q10

8. 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 £ [   ]

9. How many people does this cost cover?

Total people [   ]

10. What mode of transport did you use to get here today? *(Select from COLUMN 1) OVERNIGHT VISITORS ONLY and what other modes of transport have you used/will you use during your stay? (Select all that apply from COLUMN 2).*

	TODAY	REST OF TRIP
ELECTRIC - Private car/ van/ other motor vehicle (rented or owned)	1	1
PETROL/DIESEL - Private car/ van/ other motor vehicle (rented or owned)	2	2
Bus/ coach service	3	3
Coach tour	4	4
Taxi	5	5
Bicycle (own)	6	6
Bicycle (hired)	7	7
Train	8	8
Walked/On foot	9	9

11. What do you plan to do on your visit to this area TODAY? *(Select all that apply from COLUMN 1) OVERNIGHT VISITORS ONLY and what else are you planning to do during the rest of your stay? (Select all that apply from COLUMN 2).*

	TODAY	REST OF TRIP
Go for a walk	1	1
Have a picnic	2	2
Walk the dog	3	3
Go for a jog/run	4	4
Watch wildlife	5	5
Go cycling (on my own bike)	6	6
Go cycling (on a hired bike)	7	7
Walk all/part of the South Downs Way	8	8
Visit a vineyard	9	9
Visit a historic house or gardens	10	10
Visit a museum or gallery	11	11
Visit a cafe/pub/tea room	12	12
Go shopping	13	13
Other (please specify below)	14	14

....

12. 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
Previous knowledge of site/area	4
Google search	5
Other Internet/website *(please specify which ones)*	6
....	
Facebook	7
Twitter	8
Other social media (e.g. Instagram)	9
Local or national radio	10
Local or national TV (e.g. Countryfile)	11
Local or national newspapers/magazines	12
Apps *(please specify which ones)*	13
....	
Paper maps (e.g. Ordnance Survey)	14
NONE OF THESE	15
Other *(please specify below)*	16

....

13. 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

14. 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 breath-taking views	1
Enjoying the fresh air	2
Nature/wildlife	3
Tranquil/unspoilt places	4
Spending time with friends and/or family	5
Outdoor recreation activities	6
It improved my health and wellbeing	7
Distinctive towns & villages	8
Rich cultural heritage	9
Availability of locally sourced produce	10
Good value for money	11
Good places to eat and drink	12
Plenty of things to see and do	13
Easy to get to/Good access to the countryside	14
Other *(please specify below)*	15

....

15. How important has being outside in a natural environment become to you since the outbreak of COVID-19?

As important as always	1
Become more important	2
Become less important	3

16. What, if anything, 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. ....

17. 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	£

18. 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	Other
Under 16 years			
16-24 years			
25-34 years			
35-44 years			
45-54 years			
55-64 years			
65-74 years			
75+ years			

How would you describe your ethnic 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 *(specify)*	9
Do not wish to answer	10

20. 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

21. 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: _____

Appendix C: Data tables

Q1

Were you aware that you are in the South Downs National Park?	Count	%
Yes	1802	89%
No	234	11%

Q2

How often have you visited this area over the past 12 months?	Count	%
More than once a week	292	13%
About once a week	209	9%
About once a month	253	11%
About four times this year	389	17%
About once this year	276	12%
This my first visit	832	37%

Q3

Visitor type	Count	%
Local resident	905	40%
Day visitor	836	37%
Overnight visitor (staying within the National Park)	226	10%
Overnight visitor (staying outside the National Park)	272	12%

Q4

Was this location being in a National Park a factor in your decision to visit this area?	Count	%
Yes	208	47%
No	230	53%

Q7

In what type of accommodation are you staying?	Count	%
Hotel	168	34%
Staying with friends or family	84	17%
AirBnB/Homestay	57	11%
B&B	51	10%
Self catering accommodation (cottage, unit, etc)	47	9%
Caravan (static rented or owned or towed)	32	6%
Camping	28	6%
Pub/Inn	19	4%
Hostel	8	2%
Glamping (inc. Yurts/tepees/shepherds huts/etc)	4	1%

Q10a

What mode / modes of transport did you use to get here today?	Count	%
PETROL/DIESEL - Private car/van/other motor vehicle (rented or owned)	1730	77%
Walked/on foot	244	11%
Bus/coach service	98	4%
Train	83	4%
ELECTRIC - Private car/van/other motor vehicle (rented or owned)	81	4%
Bicycle (owned)	68	3%
Coach tour	23	1%
Taxi	9	0%

Bicycle (hired)	5	0%

Q10b

What other modes of transport have you used / will you use during your stay?	Count	%
Walked/on foot	63	57%
PETROL/DIESEL - Private car/van/other motor vehicle (rented or owned)	17	15%
Train	15	14%
Bus/coach service	10	9%
ELECTRIC - Private car/van/other motor vehicle (rented or owned)	5	5%
Coach tour	3	3%
Bicycle (own)	3	3%
Taxi	2	2%
Bicycle (rented)	1	1%

Q11a

What do you plan to do on your visit to this area TODAY?	Count	%
Go for a walk	1441	64%
Visit a cafe/pub/tea room	735	33%
Walk the dog	484	22%
Watch wildlife	331	15%
Have a picnic	285	13%
Walk all /part of the South Downs Way	224	10%
Go shopping	213	10%
Other (please specify)	199	9%
Visit a historic house or gardens	190	8%
Cycle (on my own bike)	94	4%
Visit a museum or gallery	51	2%
Go for a jog/run	41	2%
Cycle (on a hired bike)	6	0%
Visit a vineyard	5	0%

Q11b

What else are you planning to do during the rest of your visit?	Count	%
Visit a cafe/pub/tea room	201	50%
Go for a walk	130	32%
Go shopping	115	28%
Visit a historic house or gardens	75	18%
Watch wildlife	57	14%
Walk all /part of the South Downs Way	50	12%
Visit a museum or gallery	49	12%
Walk the dog	27	7%
Have a picnic	23	6%
Other (please specify)table	20	5%
Go for a jog/run	19	5%
Cycle (on my own bike)	9	2%
Visit a vineyard	5	1%

Q12a

What resources did you use to plan your trip or influenced your choice/decision to visit	Count	%
Previous knowledge of site/area	1094	49%

Google search	394	18%
NONE OF THESE	388	17%
Word of mouth	263	12%
Other internet/website (please specify)	141	6%
Paper mags (e.g Ordnance Survey)	117	5%
Other (please specify)	89	4%
Information leaflets	64	3%
Magazines (e.g. National Trust)	51	2%
Apps (please specify which ones)	47	2%
Facebook	14	1%
Local or national TV (e.g. Countryfile)	7	0%
Local or national newspapers/magazines	6	0%
Other social media (e.g Instagram)	5	0%
Twitter	1	0%
Local or national radio	0	0%

Q13

How would you rate your level of overall enjoyment of your visit to this part of the South Downs National Park so far today?	Count	%
Very poor	1	0%
Poor	2	0%
Average	42	2%
High	644	29%
Very High	1510	67%
Don't Know	40	2%

Q14

	Count	%
Enjoying the fresh air	1512	68%
Scenic landscape and/or breathtaking views	1457	65%
Natural/wildlife	1131	51%
Tranquil/unspoilt places	864	39%
Spending time with friends and/or family	744	33%
It improved my health and wellbeing	693	31%
Easy to get to/Good access to the countryside	618	28%
Outdoor recreation activities	598	27%
Good places to eat and drink	499	22%
Plenty of things to see and do	377	17%
Distinctive towns and villages	363	16%
Rich cultural heritage	352	16%
Good value for money	244	11%
Other (please specify below)	176	8%
Availability of locally sourced produce	101	5%

Q15

How important has being outside in a natural environment become to you since the outbreak of COVID-19?	Count	%
As important as always	1282	57%

Become more important		953	43%
Become less important		4	0%

Location	Count	%
Alfriston	108	5%
Alice Holt Country Park	125	6%
Arundel	123	5%
Beachy Head	115	5%
Birling Gap	115	5%
Blackdown	115	5%
Butser Hill	74	3%
Cissbury/Chanctonbury	70	3%
Devil's Dyke	106	5%
Ditchling Beacon	96	4%
Harting Down	100	4%
Kingley Vale	50	2%
Lewes	99	4%
Midhurst	117	5%
Old Winchester Hill	102	5%
Petersfield Heath	60	3%
Petworth	90	4%
Pulborough Brooks	107	5%
QECP	115	5%
Seven Sisters	156	7%
Truleigh Hill	56	3%
West Walk	60	3%
Winchester City Mill	80	4%

Ethnicity	Count	%
White British	1992	89%
White Other	134	6%
Asian	27	1%
Asian British	24	1%
White Irish	19	1%
Do not wish to answer	14	1%
Mixed	11	0%
Other ethnic group	11	0%
Black British	5	0%
Black	2	0%

Ethnicity combined	Count	%
White	2145	96%
Non-white	80	4%

Disability	Count	%
Yes – limited a lot	46	2%
Yes – limited a little	146	7%

No	2030	91%
Do not wish to answer	17	1%

Age (all visitor group members)	Count	%
Under 16	398	12%
16-24	140	4%
25-34	306	9%
35-44	478	14%
45-54	556	17%
55-65	666	20%
65-74	555	17%
75+	247	7%

Gender (all visitor group members)	Count	%
Male	1745	48%
Female	1873	52%

Appendix D: Overnight visitor site by post code area

The tables below have been split due to the number of areas analysed and its impact on the size of the tables and to ensure the responses given are legible. The tables have simply been split alphabetically.

Table A: Visitor site by post code :

Alfriston	Alice Holt Country Park	Arundel	Beachy Head	Birling Gap	Blackdown
Butner Hill	Cissbury/Chanctonbury	Devil's Dyke	Ditchling Beacon	Harting Down	

Table B: Visitor site by post code :

Kingley Vale	Lewes	Midhurst	Old Winchester Hill	Petersfield Heath	Petworth
Pulborough Brooks	QECP	Seven Sisters	Truleigh Hill	West Walk	Winchester City Mill

Site	Grand Total	Alfriston	Alice Holt Country Park	Arundel	Beachy Head	Birling Gap	Blackdown	Butser Hill	Cissbury/Chanctonbury	Devil's Dyke	Ditchling Beacon	Harting Down
Grand Total	**1251**	84	68	78	59	70	24	39	26	56	53	61
PO - Portsmouth	**174**	4	8	8	1		2	18	2	2	7	20
BN - Brighton	**155**	28	1	8	3	12		1	7	9	10	2
GU - Guildford	**122**	3	25	5	2	2	6	5	1		2	15
RH - Redhill	**80**	4	3	6	1	6	1		5	7	5	1
SO - Southampton	**65**		2	1			4	4		1	1	5
TN - Tunbridge Wells	**47**	4			3	5		1	2	3		1
RG - Reading	**39**		8	2	1			1		1	2	2
SW - South West London	**35**	2	2	4	1	3				3	3	
KT - Kingston Upon Thames	**27**	2	4	5	1	1			1	1	2	2
SE - South East London	**23**	3			3	4	1		1	3		
CR - Croydon	**19**	1	5	3	2	3			1	1		
E - East London	**16**						1	1		2	3	
ME - Medway	**16**			1	1							
N - North London	**16**	3			2					3	1	
NW - North West London	**14**	1			1	2			1		1	1
SL - Slough	**14**	1		1	1	2					1	
TW - Twickenham	**12**		1	3					1			
BR - Bromley	**11**		1	2	1	2						
OX - Oxford	**10**	1		2					1		1	2
SM - Sutton	**10**		2	1	2				1			1
CO - Colchester	**9**			1					1		2	
SP - Salisbury	**9**	2	1		2							

	Total										
AL - St. Albans	8				1	1					1
BH - Bournemouth	8			1		1			1		
W - West London	8			2					1	1	
CM - Chelmsford	7	2		1		1					
CT - Canterbury	7	2	1			1					
HA - Harrow	7			1		2			1	1	
NG - Nottingham	7					1	1		1		
SS - Southend-on-Sea	7	1				1	1				
WR - Worcester	7	3	1			2			1		
B - Birmingham	6	1				1				1	1
BS - Bristol	6	2				1					
CB - Cambridge	6					1	2				
DE - Derby	6			2							
GL - Gloucester	6		1						1		1
HP - Hemel Hempstead	6			2		1		2			
LE - Leicester	6	1		1		1		1	1		
NN - Northampton	6			2							
NR - Norwich	6			1		1		1			
UB - Southall	6			1						1	
BA - Bath	5					1		1	1		
CF - Cardiff	5					2		1			
DA - Dartford	5	1		1			1		1		
HOLLAND	5						2	1	1		
IP - Ipswich	5			1			1		1		
PL - Plymouth	5								1		1
SG - Stevenage	5	1						1			

SN - Swindon	5	2											1
TA - Taunton	5							1					
YO - York	5						2			1			
EN - Enfield	4					1							
EX - Exeter	4						1				1		
MK - Milton Keynes	4						1				1		
NP - Newport	4												
S - Sheffield	4					1				1			1
ST - Stoke on Trent	4					2							
WA - Warrington	4					1				1	1		
CH - Chester	3	1	1										
DY - Dudley	3					1							
EH - Edinburgh	3							1					
FRANCE	3						1			1	1		
IG - Ilford	3	1								1			1
JE - Jersey	3									1			
LA - Lancaster	3									1			
LS - Leeds	3	1								1	1		
M - Manchester	3												
PR - Preston	3					1	1						
SK - Stockport	3								1				
SY - Shrewsbury	3	1					1						
TR - Truro	3						1				1		
TS - Teeside	3												
USA	3	1			1	1							
AB - Aberdeen	2		1										
BELGIUM	2						1						
BL - Bolton	2												

CA - Carlisle	**2**			1						
DL - Darlington	**2**									
DN - Doncaster	**2**	1								
DT - Dorchester	**2**									
EC - East Central London	**2**				1				1	
HX - Halifax	**2**									
KY - Kirkcaldy	**2**									
L - Liverpool	**2**	1								
LU - Luton	**2**									
NE - Newcastle-Upon-Tyne	**2**						1		1	
RM - Romford	**2**	1		1						
WD - Watford	**2**									
WS - Walsall	**2**				1					
AUSTRALIA	**1**									1
BB - Blackburn	**1**									
BD - Bradford	**1**									
BERMUDA	**1**									
BT - Belfast	**1**									
CANADA	**1**									
CAPE TOWN	**1**									
CV - Coventry	**1**			1						
CW - Crewe	**1**			1						
DENMARK	**1**							1		
DH - Durham	**1**		1							
G - Glasgow	**1**				1	1				
GERMANY	**1**		1							
HD - Huddersfield	**1**									
HR - Hereford	**1**									

INDIA	**1**					**1**							
ITALY	**1**					**1**							
KA - Kilmarnock	**1**					**1**							
PE - Peterborough	**1**												
PH - Perth	**1**											**1**	
PORTUGAL	**1**					**1**							
SA - Swansea	**1**						**1**						
SPAIN	**1**					**1**							
SWITZERLAND	**1**				**1**								
TQ - Torquay	**1**			**1**									
WC - West Central London	**1**			**1**									
WF - Wakefield	**1**												
WV - Wolverhampton	**1**												

Site	Grand Total	Kingley Vale	Lewes	Midhurst	Old Winchester Hill	Petersfield Heath	Petworth	Pulborough Brooks	QE CP	Seven Sisters	Truleigh Hill	West Walk	Winchester City Mill
Grand Total	1251	17	65	60	57	20	72	64	69	113	27	11	58
PO - Portsmouth	174	6	1	14	16	13	8	13	18	2	2	7	2
BN - Brighton	155	1	6	7	3		4	18	4	23	7		1
GU - Guildford	122		1	12	6	4	5	4	12	3	2		7
RH - Redhill	80	1	4	3			14	10	2	6			1
SO - Southampton	65	3	2	4	12	1	2	3	11		3		6
TN - Tunbridge Wells	47	1	7	3			1	4		10	1		1
RG - Reading	39			1	6	1	2		2	3			7
SW - South West London	35		5	1			2	1	1	3	2		2
KT - Kingston Upon Thames	27		1				3		1	3			
SE - South East London	23		1						1	5			1
CR - Croydon	19							1		2			
E - East London	16									8	1		
ME - Medway	16		6						1	4			3
N - North London	16		2				1			3			1
NW - North West London	14		2				1			2			2
SL - Slough	14			1	1				1	3			1
TW - Twickenham	12				1				1	3	1		1
BR - Bromley	11		1	1			1		1	1			
OX - Oxford	10			1						2			

	Total												
SM - Sutton	**10**						1	1	1				
CO - Colchester	**9**			1					3				1
SP - Salisbury	**9**			1				2					1
AL - St. Albans	**8**			1			1		2				1
BH - Bournemouth	**8**		1			1		1					2
W - West London	**8**		1					1	1				1
CM - Chelmsford	**7**					2						1	
CT - Canterbury	**7**			1	1							1	
HA - Harrow	**7**					1			1				
NG - Nottingham	**7**		1		1								2
SS - Southend-on-Sea	**7**		1		1	1			1				
WR - Worcester	**7**												
B - Birmingham	**6**				1				1				
BS - Bristol	**6**						1	1					1
CB - Cambridge	**6**								1	1			1
DE - Derby	**6**		2						1	1			
GL - Gloucester	**6**		1	1			1						
HP - Hemel Hempstead	**6**								1				
LE - Leicester	**6**												1
NN - Northampton	**6**	1	1				1						1
NR - Norwich	**6**		1						1			1	
UB - Southall	**6**							1	2				1
BA - Bath	**5**					2							
CF - Cardiff	**5**						1		1				
DA - Dartford	**5**												1
HOLLAND	**5**						1						

	Total												
IP - Ipswich	5				1						1		
PL - Plymouth	5			1						1		1	
SG - Stevenage	5				1		1						1
SN - Swindon	5				1		1						
TA - Taunton	5	1		1				1	1				
YO - York	5												2
EN - Enfield	4		1							2			
EX - Exeter	4						1				1		
MK - Milton Keynes	4		1							1			
NP - Newport	4		2				2						
S - Sheffield	4												1
ST - Stoke on Trent	4						1		1				
WA - Warrington	4		1										
CH - Chester	3							1					
DY - Dudley	3						2						
EH - Edinburgh	3									1	1		
FRANCE	3												
IG - Ilford	3												
JE - Jersey	3						2						
LA - Lancaster	3				1		1						
LS - Leeds	3												
M - Manchester	3		2	1									
PR - Preston	3						1						
SK - Stockport	3						1						1
SY - Shrewsbury	3		1										
TR - Truro	3									1			
TS - Teesside	3							2	1				
USA	3												

AB - Aberdeen	**2**			1								
BELGIUM	**2**			1								
BL - Bolton	**2**		1						1			
CA - Carlisle	**2**		1									
DL - Darlington	**2**					1					1	
DN - Doncaster	**2**											1
DT - Dorchester	**2**			1		1						
EC - East Central London	**2**											
HX - Halifax	**2**					1				1		
KY - Kirkcaldy	**2**	1					1					
L - Liverpool	**2**					1						1
LU - Luton	**2**	1	1									
NE - Newcastle-Upon-Tyne	**2**											
RM - Romford	**2**											
WD - Watford	**2**			2								
WS - Walsall	**2**							1				
AUSTRALIA	**1**											
BB - Blackburn	**1**		1									
BD - Bradford	**1**							1				
BERMUDA	**1**								1			
BT - Belfast	**1**											1
CANADA	**1**	1										
CAPE TOWN	**1**			1								
CV - Coventry	**1**											
CW - Crewe	**1**											
DENMARK	**1**											
DH - Durham	**1**											
G - Glasgow	**1**											

GERMANY	**1**										
HD - Huddersfield	**1**		1								
HR - Hereford	**1**					1					
INDIA	**1**										
ITALY	**1**										
KA - Kilmarnock	**1**										
PE - Peterborough	**1**					1					
PH - Perth	**1**										
PORTUGAL	**1**										
SA - Swansea	**1**										
SPAIN	**1**										
SWITZERLAND	**1**										
TQ - Torquay	**1**										
WC - West Central London	**1**										
WF - Wakefield	**1**		1								
WV - Wolverhampton	**1**					1					

Appendix E: Reliability, analysis and reporting

Statistical reliability

The findings are based on the results of a face-to-face <u>sample</u> survey of visitors – hereafter referred to as respondents. Findings are therefore subject to sampling tolerances. With 2,239 visitors having completed the survey, this returns a confidence interval of ±2% for a 50% statistic at the 95% confidence level. This simply means that if 50% of respondents indicated they agreed with a certain aspect, the true figure (had the whole population been surveyed) could in reality lie within the range of 48% to 52% and that these results would be seen 95 times out of 100. The table below shows the confidence intervals for differing response results (sample tolerance).

Surveys completed overall

Size of sample	Approximate sampling tolerances*		
	50%	30% or 70%	10% or 90%
2,239 surveys	±2	±1.9	±1.2

Analysis and reporting

In the report, cross-tabulations were generated for key variables including gender and age, whether respondents had a disability or not, ethnicity and location of survey. It should be note that age group comparisons could not be made due to the nature of how this data was collected i.e. multiple age groups could have been collected for each survey response as visitors were asked 'Who else they visited with'. Therefore it is difficult to attribute trends to a specific age group.

Differences in the views of sub-groups of the population were compared using z-tests. Statistically significant results (at the 95% level) are indicated in the text. Statistical significance means that a result is unlikely due to chance (i.e. It is a real difference in the population). Although it should be noted that the profile of the respondents may not be representative of the true population of all South Downs National Park visitors. Owing to the rounding of numbers, percentages displayed visually on graphs and charts within this report may not always add up to 100% and may differ slightly when compared with the text. The figures provided in the text should always be used. Where figures do not appear in a graph or chart, these are 3% or fewer respondents. The 'base' or 'n=' figure referred to in each chart and table is the total number of respondents who provided a valid response. Analysis should be taken with caution when viewing a subgroup with a base lower than 30.

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