



Cuckmere Valley Visitor Survey

Public Evidence Meeting Presentation
County Hall, Lewes, 8 February 2011



Research team

- Tourism South East Research – research arm of the regional tourist board. We have a wealth of experience in visitor research – carry out on avg. 30 face-to-face visitor surveys per year;
- Project manager: Dr Parves Khan, Head of Research;
- Research manager: Sarah Regan, TSE Research;
- Fieldwork manager: Kerry Rayment, TSE Research;
- Team of 8 market researchers;
- Technical team for survey processing.



Research background

The objectives of the visitor survey were to identify:

- who visits the Cuckmere Valley;
- the main purpose of their visit;
- where they come from and how far they have travelled;
- how often they visit;
- the aspects of the Valley they value most;
- what other places they visited in the area;
- how much they spend in the local area;
- the main mode of transport used; and,
- how they found out about Cuckmere Valley.



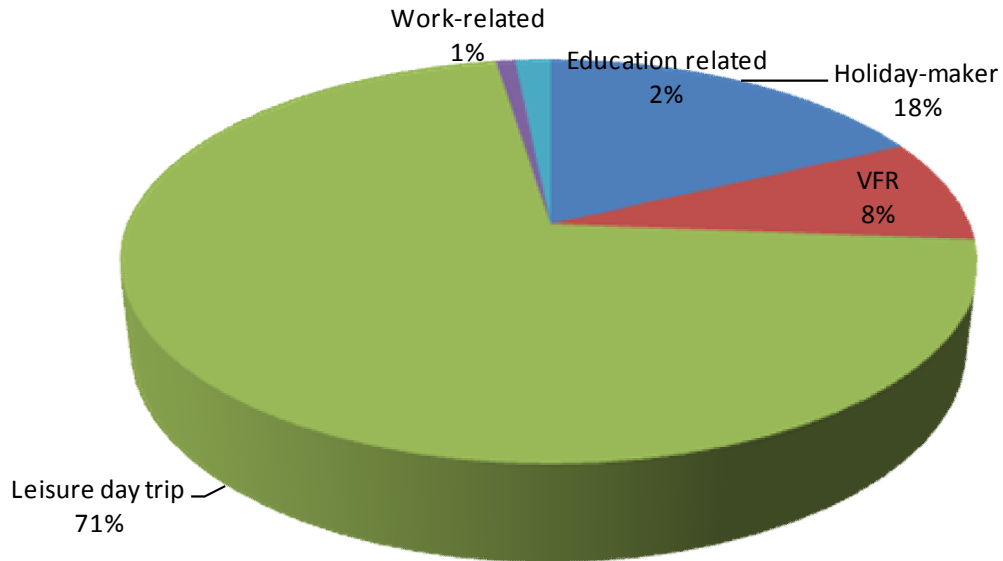
Survey methodology

- The survey involved face-to-face interviews with a random sample of visitors at 7 interview locations over the peak and off-peak period. These were:
 - Golden Galleon car park
 - Visitor Centre complex
 - Main visitor centre car park
 - South Barn Hill car park
 - Concrete Path
 - South Downs Way
 - Main entrance gate
- In total 693 visitors were interviewed



Study findings: visitor profile

Type of visitor



Age of visitors

Age profile of visitors – overall		
	Sum	%
Total 0-15	245	17%
Total 16-24	79	6%
Total 25-34	124	9%
Total 35-44	201	14%
Total 45-54	213	15%
Total 55-64	310	22%
Total 65+	243	17%
Total people	1415	100%

Majority of holiday-makers/VFR visitors were staying overnight in East Sussex; third stay 1-3 nights, avg. of 7 nights



Study findings: visitor profile

- Overall, the mean average group size was 2.67 people (median of 2).
- The majority of visiting groups were made up of adults only. 78% of all visiting groups contained only adults (same over the peak and off-peak periods).
- The vast majority of visitors (92%) were British residents. 60% of domestic visitors from East Sussex.
- 53 foreign resident visitors interviewed; came from a total of 24 different countries. The two dominant countries were Germany and France.



Study findings: Purpose of visit

Main purpose of visit		
	Summer	Winter
Base	526	167
To walk	55%	54%
Walking the dog	11%	16%
Offers a good family day out	6%	5%
To discover/ explore somewhere new	6%	8%
Specifically visiting to explore the Valley	5%	2%
To bike ride	4%	1%
To have a meal/ drink	3%	2%
To bird watch	2%	3%
Part of the holiday itinerary	2%	2%
Convenience/ close to home	1%	1%
To canoe	1%	0%
Educational purposes	1%	2%

Walking was by far the most popular reason for visiting among leisure visitors over both the summer and winter period, with a sizeable minority of visitors also taking their dog for a walk.

‘Discover or explore somewhere new’ popular response among holiday-makers.



Study findings: Locations visited

During the peak period, popular places visitors had come to see were the shingle beaches and the Old Meanders.

Specific locations come to see		
	Summer	Winter
Base	526	167
Shingle beach (east side)	33%	19%
Shingle beach (west side)	27%	11%
Old Meanders	26%	14%
Coastguard Cottages	12%	10%
Lagoon (behind east beach)	7%	4%
Visitor Centre complex	6%	3%
Foxhole Cottage/ Campsite	1%	0%
Other responses	56%	78%

Significant number of visitors provided 'other' responses:

- *To walk or explore the area generally*
- *Countryside in general*
- *Scenery in general*
- *Nature/ wildlife*
- *Cliffs*
- *Seven Sisters*



Study findings: Main attractions of the Valley

Summer	526	Winter	167
The Meanders	38%	Views/ sea views/ scenery	33%
The Beach/ beaches	30%	Seven Sisters	23%
Views/ sea views/ scenery	20%	The Meanders	19%
Seven Sisters	13%	The River	13%
Coastguard Cottages	11%	Cliffs/ chalk cliffs	13%
Beach	20%	The sea	11%
Lagoon	7%	Beach	11%
The general environment/ area	7%	Nature/ wildlife	10%
Ideal place to walk / exercise	6%	The general environment/ area	9%
Cliffs/ chalk cliffs	6%	Walks (generally)/ exercise	9%
The River	4%	Peace & quiet	6%
Nature/ wildlife	3%	Coastguard Cottages	3%
Visitor Centre complex	3%	Birds	3%
The Downs	2%	The Downs	3%
Peace & quiet	2%	Open spaces	3%
Footpaths/ bridle paths	1%	Footpaths/ bridle paths	1%



Study findings: Important aspects of Valley

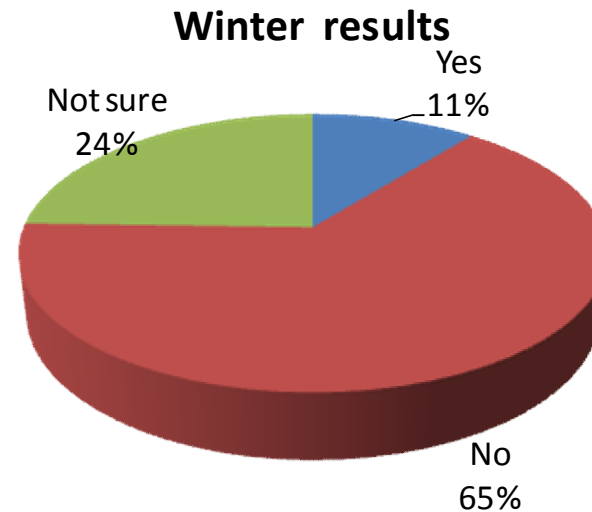
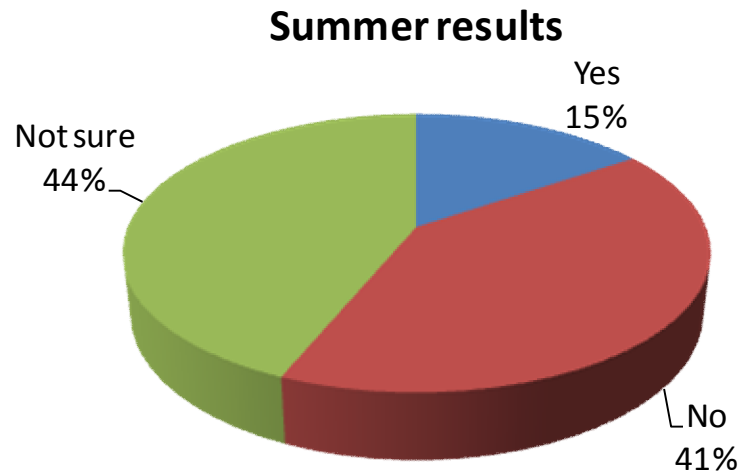
Most important aspects		
	526	167
Sea views/ views of chalk cliffs	79%	89%
Wildlife	52%	54%
Access to the beach	44%	43%
Well maintained footpaths	38%	32%
The Meanders	35%	43%
Provision of facilities	14%	17%
Views of the cottages	10%	7%
Other aspects	3%	2%

The 'Sea views / views of chalk cliffs' the most important aspect to the enjoyment of the trip. Followed by the 'Wildlife' 'Access to the beach', 'Well maintained footpaths, and 'The Meanders'.

Important aspects mentioned by visitors during both the peak and off-peak period



Study findings: Whether changes affect future visits



Overall results

Yes	14%
No	47%
Not sure	39%

Overall, a small stated that they would not visit the Cuckmere Valley if the landscape changed significantly. Just under half of all visitors replied that they would continue to visit the valley.

A significant proportion of visitors, representing 39% of the overall sample, replied that they were unsure as to whether future changes would stop them visiting.



Study findings: Facilities used

Facilities used during visit		
	Summer	Winter
Base	526	167
Car parks	83%	82%
Visitor/ Tourist Information Centre	34%	28%
Golden Galleon pub	20%	10%
Exceat Farmhouse restaurant	19%	14%
Other local restaurants/cafes/tea rooms	12%	15%
Bus services	10%	11%
Other local pubs	7%	12%
Local shops	6%	10%
Canoe launch	3%	0%
Other local attractions in the area	2%	1%
Cycle rental	2%	0%
Foxhole campsite	0%	1%
Other services	12%	13%

Most visitors used one or more facilities/services available.

Other responses:

- *Toilets*
- *Ice cream van*
- *Cycle routes*
- *Shelter building course*
- *Farmers Market*



Study findings: Frequency of visits

'Core' group visit every day and once a week.

Frequency of visits does not change significantly over the autumn/winter.

Frequency differs by visitor type with day visitors being more frequent visitors than the other visitor types over both periods.

Frequency of visits		
	Over peak	Over off-peak
	693	693
Every day	5%	4%
Once a week	13%	10%
Once a month	16%	14%
2-3 times	25%	19%
Once over the spring/summer	14%	15%
First visit or less often	28%	38%



Study findings: Mode of travel

Mode of travel		
	526	167
Car	81%	83%
Bus	9%	10%
Walked	6%	5%
Train	2%	1%
Bicycle	2%	1%
Motorcycle	1%	0%
Coach (private tour)	1%	0%
Other	0%	0%

The car was the most common mode of transport used by visitors to reach Cuckmere Valley.

The proportion of visitors arriving by car remained the same over the summer and winter period.



Study findings: Information sources used

Information sources used		
	526	167
	Summer	Winter
Previous knowledge of the area	64%	77%
Website	15%	12%
Personal recommendation	12%	7%
Tourist/ visitor leaflet	3%	1%
Walking guide	3%	5%
Touring guide book	2%	2%
Brochure/ holiday guide	1%	1%
Information/ visitor centre	1%	0%
Advertisement/ poster	1%	1%
Newspaper/ TV/ radio feature/ article	1%	2%
None used	10%	4%
Other	8%	14%

The majority of visitors relied on their previous knowledge of the area when it came to planning their trip.

Of the formal channels of communication, the internet and personal recommendation mentioned more times than other sources.



Thank you

Questions?