Lewes Visitor and Business Surveys 2021

Final Report

October 2021

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Summary of Key Findings

Key Points in Relation to Visitor Survey

Respondents mainly travel to Lewes by car (51%) or on foot (34%).

Those travelling by car most commonly use a paid car park (48%), followed by a supermarket car park (39%).

The average distance travelled by respondents visiting Lewes is estimated to be at least 4.34 miles, but with this reflecting a mix of many people that live very close to the centre of Lewes and many others that live greater than 10 miles away.

Overall, respondents were broadly split between residents of Lewes or the outskirts of Lewes (54%) and residents living 2 miles or more from Lewes (47%).

The most common main reason given by respondents for visiting Lewes was shopping (50%), followed to a significantly lesser extent by using services (12%) and just looking around town (11%). Additional reasons given for visiting Lewes were eating or drinking out (29%), shopping (21%), just looking around town (13%) and other social or leisure (10%).

The vast majority of respondents had visited both the pedestrianised precinct on Cliffe High Street (88%) and School Hill on High Street (71%) on the day of interview. The vast majority of respondents interviewed in the School Hill / High Street area (76%) said they were also visiting the pedestrianised Precinct / Cliffe High Street area. By contrast, only 38% of those interviewed in the Precinct / Cliffe area said they were also visiting the School Hill / High Street area.

The majority of respondents say they visit Lewes at least once a week (63%) for reasons other than to shop in supermarkets. Visitors interviewed in the Precinct / Cliffe area were slightly more likely to visit the area at least once a week (68%), compared with those interviewed in the School Hill / High Street area (60%).

The average spend amongst respondents per visit to in the areas of Precinct / Cliffe and School Hill / High Street including individual shops, market stalls, takeaways, visits to the Castle Museum etc. but **excluding** expenditure at supermarkets and edge of town retail such as Homebase and Majestic Wine is £30.47. Amongst almost half of respondents (48%) the level of spend was under £20.

Key Points in Relation to Visitor Survey (continued)

When they visit the Precinct / Cliffe and School Hill / High Street areas, 45% of respondents indicate that they usually visit 2-3 shops (excluding supermarkets and edge of town retail) but with a further 23% saying they visit 4-5 shops and 21% that they visit more than 5 shops. The average time spent in the area (“dwell time”), excluding time spent at supermarkets and edge of town retail, is 96 minutes.

Half of respondents say they spend equal amounts of time in the Cliffe / Precinct area and School Hill / High Street areas while visiting Lewes, though a substantial minority (39%) say they spend most of their time in the Cliffe / Precinct area and comparatively fewer say spend most of their time in the School Hill / High Street area (10%).

Potential changes that respondents were most likely to think would make a positive change in the upper High Street area are more planting (76%), a hop on / off bus going up and down the High Street (68%), more bench seating on pavements (66%) and wider pavements in some places (61%). A majority also think that the area would be made better by reduced vehicle traffic (56%), more cycle parking stands (also 56%) and more tables and chairs outside cafes (561%. The only option where a higher proportion gave a “worse” rather than “better” rating related to a ban on through traffic (36% better compared to 41% worse).

A significant minority of respondents (28%) would be interested in using an electric delivery service (van or bike) from the independent shops in Lewes. Interest in such a service is higher amongst male respondents (34%) compared with female respondents (25%). The service also tends to be more likely than average to appeal to younger age groups with interest in 47% of 25-34 year olds and 39% of 35-44 year olds.

Key Points in Relation to Business Survey

Business respondents’ estimate of the average distance travelled by customers visiting Lewes is 5.68 miles, which is slightly higher than the 4,34 miles estimated in the visitor survey.

Businesses estimate that their customers are broadly split between residents of Lewes or the outskirts of Lewes (52%) and residents living 2 miles or more from Lewes (49%). Their perceptions of where their customers come from in this regard are broadly in line with the evidence from the visitor survey.

KEY POINTS IN RELATION TO BUSINESS SURVEY (CONTINUED)

Businesses believe that customers mainly travel to Lewes by car (52%) or on foot (23%), which is again broadly in line with the evidence from the visitor survey, though appears to slightly underestimate the proportion that travel on foot.

Businesses perceive that the vast majority of their customers that travel by car use paid for car parks (75%) and that only 7% use supermarket car parks; this appears to underestimate the proportion that use supermarket car parks, which was recorded as 39% in the visitor survey.

Most commonly, businesses estimate that their customers visit 4 to 5 shops or premises when they visit Lewes, excluding supermarkets and edge of town retail (35%), although a significant proportion say they visit 2 to 3 shops or premises (30%) or visit 5 or more shops or premises (30%). Allowing for the question needing to be phrased in a slightly different way for businesses, their perceptions again appear to be broadly borne out by the feedback from the visitor survey.

1.0 BACKGROUND, OBJECTIVES AND METHODOLOGY

BACKGROUND

1.1 Lewes Living Streets and Cycle Lewes, together with support from Lewes Town Council, Lewes District Council and others, are leading a project to develop designs to get people back in the High Street by giving more space to pedestrians and managing traffic to create a healthier, safer, vibrant, low traffic space that encourage pedestrians and cyclists to use it.

1.2 As part of this project, a survey of visitors to the High Street area and businesses operating within the central areas of Lewes was conducted to gather the views of visitor and businesses on the best ways to improve the High Street area of Lewes town.

1.3 These surveys were carried out by IBP Strategy and Research during August 2021 and this report presents the findings from these surveys, with the findings of each survey being set out separately but with comparisons between the two being drawn when appropriate.

OBJECTIVES

1.4 The visitor survey investigated the following issues:

- Methods of travel to Lewes.
- Parking behaviour amongst those visitors arriving by motor vehicle.
- Visitor locations and distance travelled.
- The main reasons for visiting Lewes.
- A profile of the specific areas visited in Lewes.
- The frequency with which people visit the central parts of Lewes, excluding trips to visit supermarkets.
- Average spend whilst visiting Lewes, excluding expenditure in supermarkets and edge of town retail.
- The number of shops / premises usually visited.

- The average time spent in Lewes including the time spent in each of the Cliffe / Precinct area and the School Hill / High Street areas.
- Views on potential changes to the High Street area in terms of their having a positive effect on making it more attractive to visitors.
- Interest in an electric vehicle delivery service from independent shops in Lewes.

The feedback in relation to each of these issues is explored herein.

1.5 A broadly similar set of issues were explored in the business survey, with business perceptions and views being explored in relation to:

- Visitor locations and distance travelled.
- Methods of travel to Lewes.
- Parking behaviour amongst those visitors arriving by motor vehicle.
- The number of shops / premises usually visited.
- Views on potential changes to the High Street area in terms of their having a positive effect on making it more attractive to visitors.
- Interest in an electric vehicle delivery service from independent shops in Lewes.

The specific results from the business survey are provided in the relevant section, with comparisons being drawn to the evidence gathered in the visitor survey.

METHODOLOGY

1.6 The visitor survey and business survey questionnaires were developed by IBP Strategy and Research in partnership with Lewes Living Streets and Cycle Lewes. The questionnaires are included as Appendix 1 (visitor survey) and Appendix 4 (business survey).[1]

[1] Appendices are included under separate cover for reasons of space.

1.7 The visitor survey was carried out face-to-face with visitors to the School Hill / High Street and Precinct / Cliffe areas of Lewes over the period from Thursday 5th August to Saturday 7th August. Interviewing was targeted to achieve a broadly even split of achieved interviews at the School Hill / High Street and Precinct / Cliffe areas, with an overall target of 300 interviews.

A total of 310 in-street visitor surveys were achieved (160 in the School Hill / High Street area, 144 in the Precinct / Cliffe area and 6 in Market Street). A sample of 310 margin of error of +/-5.57%.[2]

1.8 A hard copy business survey was delivered by representatives of Living Streets Lewes and Cycle Lewes to businesses within the central area of Lewes, these being issued around the same time as the visitor survey took place; our understanding is that the survey was issued to 230 businesses within the area concerned. Businesses were able to respond by sending back a hard copy survey or by completing the survey online, at the web address provided in the survey material. Responses came in throughout August and into-September. In total, 74 completed surveys were returned (66 hard copy and 8 online) representing a response rate of 32%. In our experience, this is a good response rate for a survey of this kind. The margin of error for this sample size and population is +/-9.9%.[3]

[2] Based on a 50% answer and a 95% confidence level. The margin of error is better for more "extreme" responses.

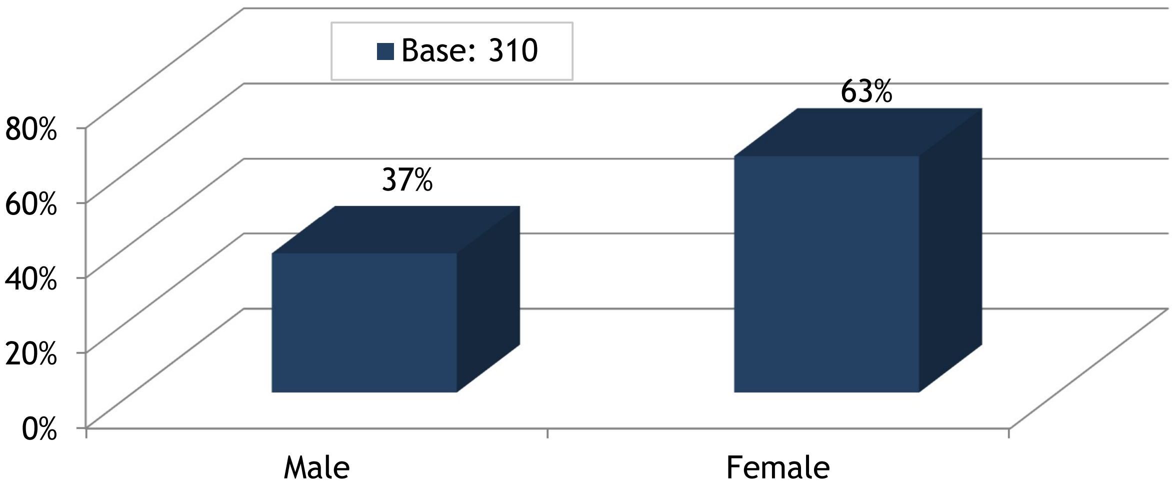
[3] Again, this is based on a 50% answer and a 95% confidence interval and the margin of error is better for more "extreme" responses.

2.0 VISITOR SURVEY

RESPONDENT PROFILE

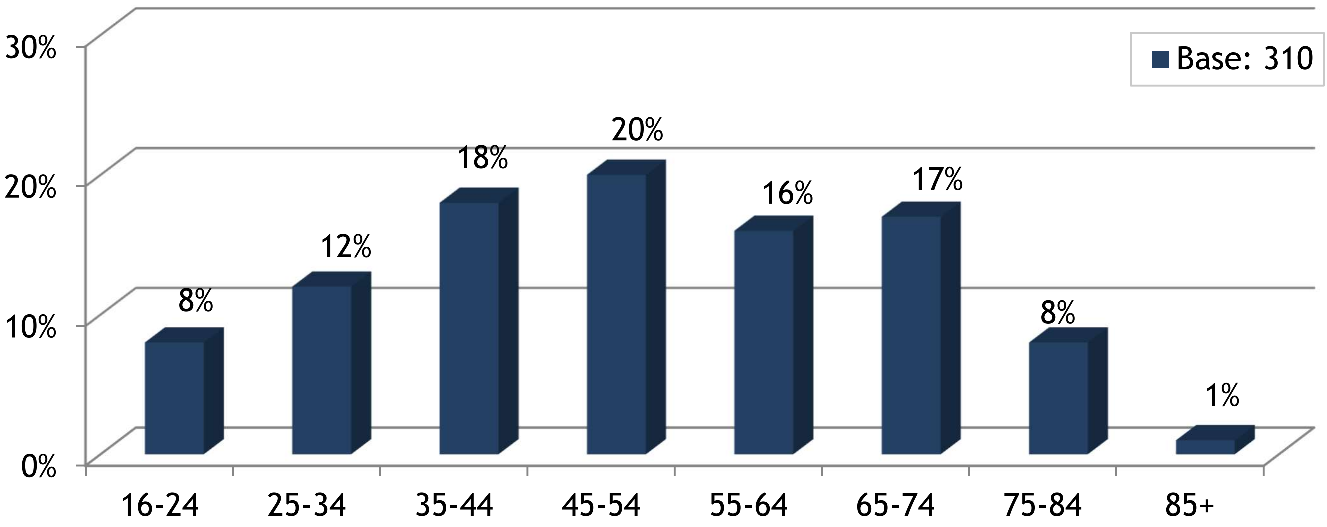
2.1 The profile of respondents by gender is illustrated in Figure 2.1. This shows that respondents were more likely to be female than male which is common in surveys of this nature.

Figure 2.1: Gender



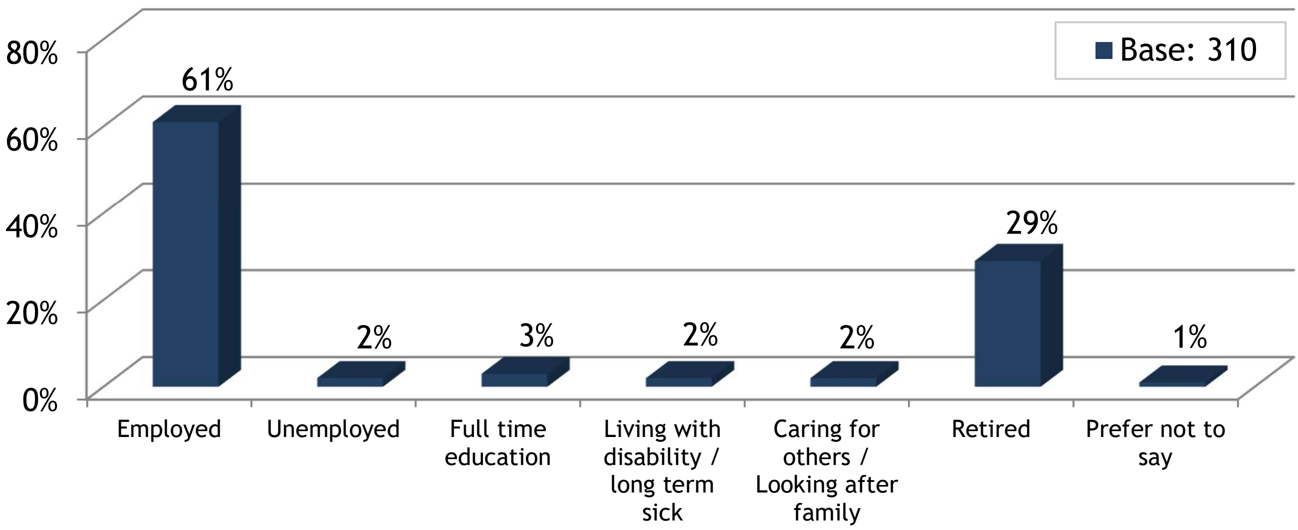
2.2 Figure 2.2 illustrates the age ranges of respondents. As shown, there are a wide range of ages with the majority of respondents (62%) over the age of 45.

Figure 2.2: Age of Respondents



2.3 Figure 2.3 illustrates that the majority of respondents are employed (61%) and a significant minority are retired (29%).

Figure 2.3: Working Status



2.4 The profile of interviews by interview location is detailed in Table 2.1.

Table 2.1: Interview Location

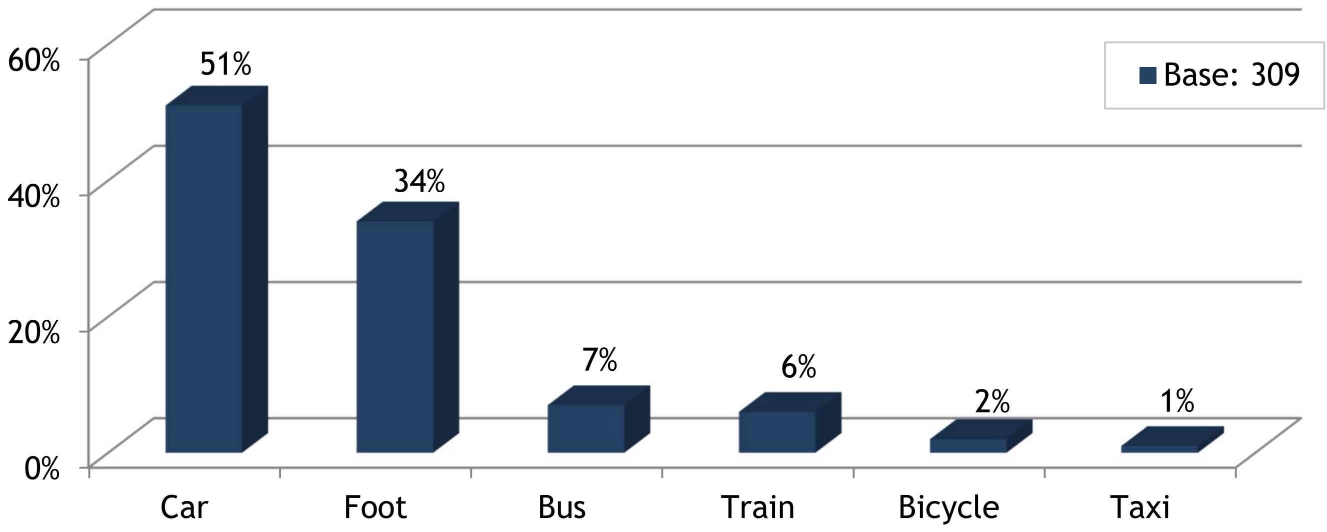
Location	%
School Hill / High Street	52%
Precinct / Cliffe	46%
Market Street	2%
Base	**310**

2.5 Appendix 2 provides a detailed breakdown of responses by these characteristics and Appendix 3 provides a full listing of responses to the open-ended questions that were asked in the survey.

2.6 Figure 2.4 illustrates respondents' main method of travel to Lewes on the day of the interview.

Figure 2.4: Main Method of Travel

What was your main method of travel to this area of Lewes today?

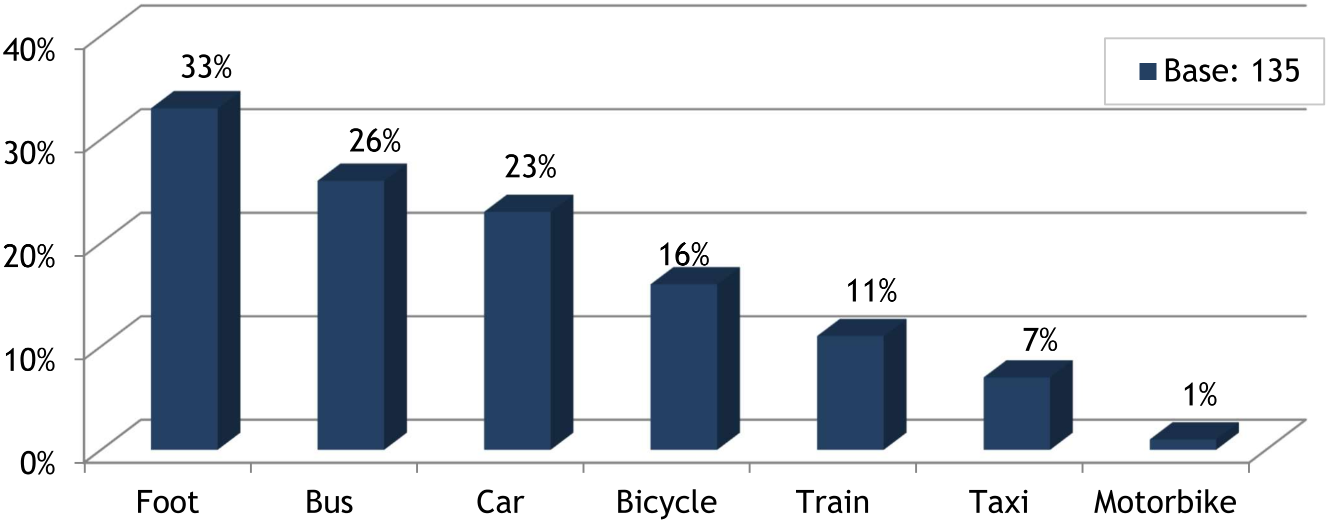


On the day respondents were interviewed, they had most commonly travelled to Lewes by car (51%), followed by a significant minority that travelled on foot (34%). Other methods of travel represented less than 10% in each case.

2.7 44% of respondents say they sometimes use other methods of travel to Lewes. These results are illustrated in Figure 2.5 (it should be noted that the base here is only those that used such "other" methods).

Figure 2.5: Other Methods of Travel

What other modes do you sometimes use to travel here?

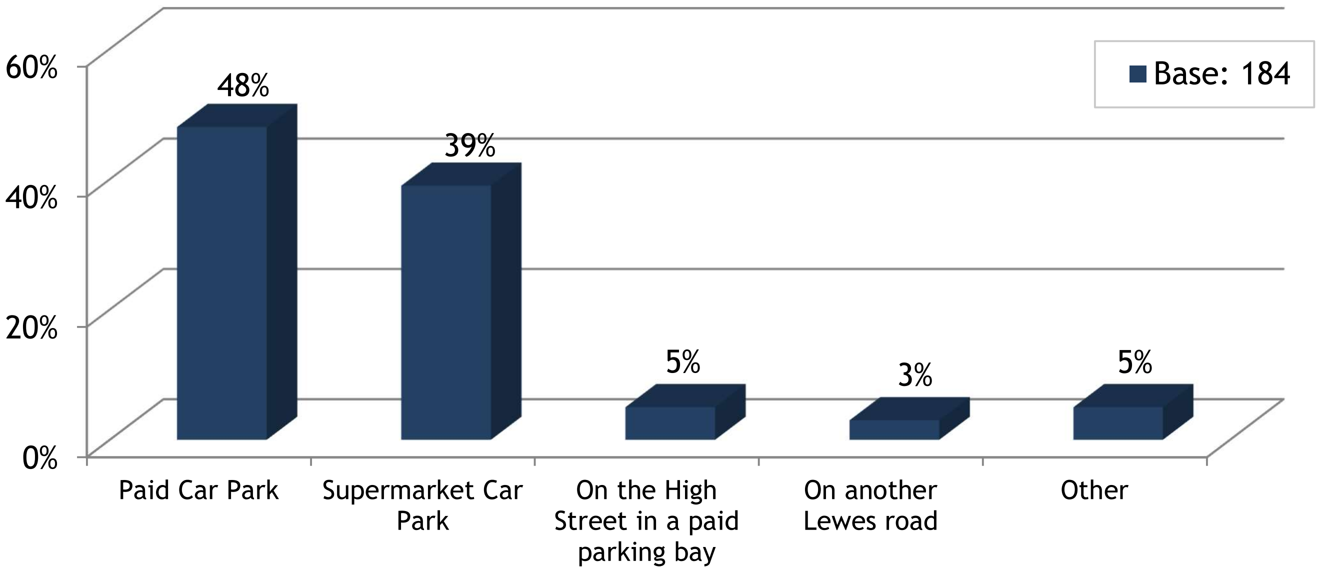


Other methods of travel used to travel to Lewes are most commonly travel on foot (33%), by bus (26%) or car (23%).

2.8 Amongst those that ever travel by car, the locations they most often park are illustrated in Figure 2.6.

Figure 2.6: Most Common Parking Locations

If you ever come by car, where do you most often park?

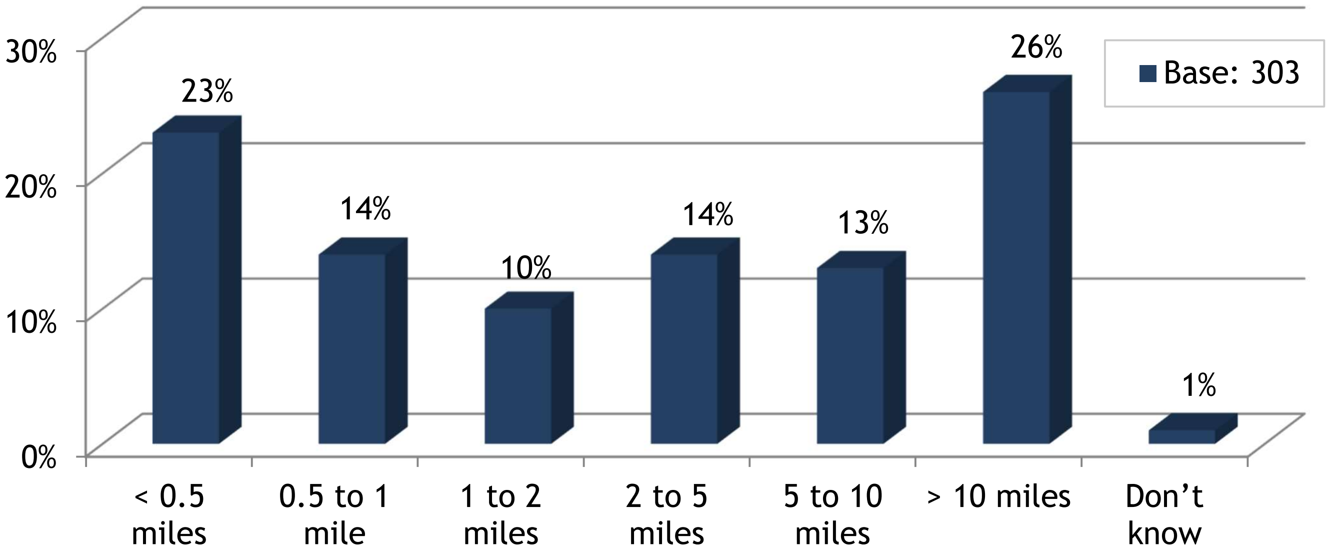


Respondents with cars most often park in paid for car park (48%) or a supermarket car park (39%). Comparatively few say they park elsewhere)for example, on the High Street (5%) or another road (3%)).

2.9 Figure 2.7 illustrates the distance respondents usually travel to get to Lewes.

Figure 2.7: Distance Travelled

Approximately how far do you usually travel to get here?



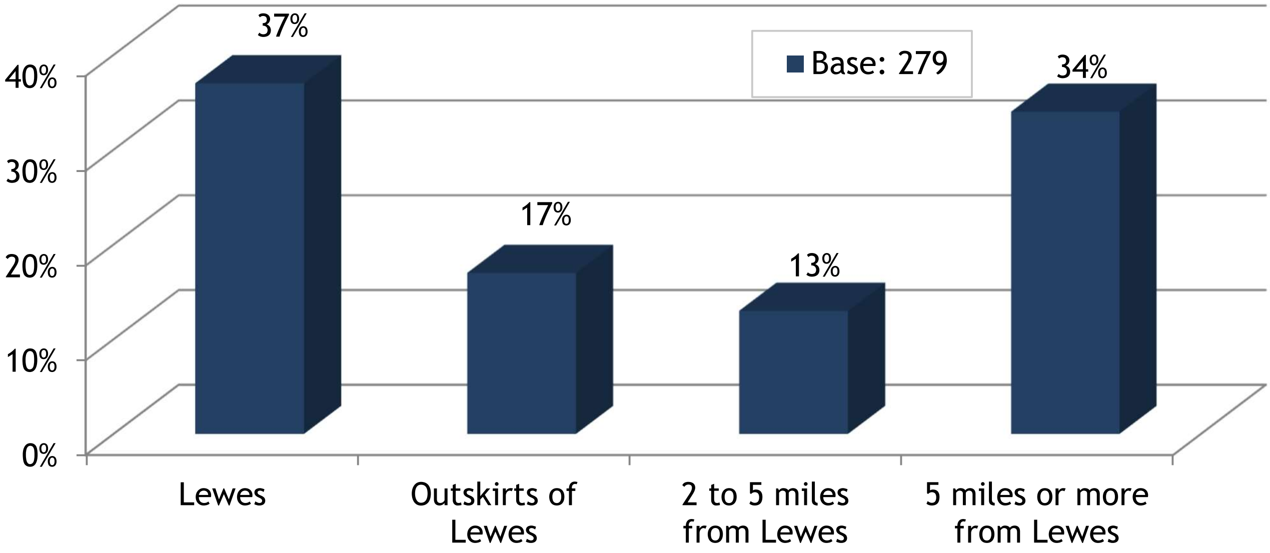
There is clearly a broad spread here, with the two single most common groups being those that say they travel fewer than 0.5 miles, so are clearly based very locally to the central area and those that say they travel greater than 10 miles.

Taking the mid-point values from the above mileage bands and assuming "more than 10 miles" as 10 miles, we have calculated the average distance travelled amongst respondents to be 4.34 miles. However, it should be noted that many of those travelling more than 10 miles will have travelled significantly more than 10 miles and therefore the actual average distance travelled will be much higher.

2.10 Respondents were then shown a map of Lewes and asked to indicate which area they live in (a copy of this map can be found in the questionnaire which forms Appendix 1 to this report). The results are illustrated in Figure 2.8.

Figure 2.8: Where Respondents Live

I am going to show you a map of Lewes and the surrounding areas? Can you tell me in which of these areas you live in?



As shown above respondents were broadly split between residents of Lewes or the outskirts of Lewes (54%) and residents living 2 miles or more from Lewes (47%).

2.11 Analysis of respondent postcodes shows the broad geographic spread of where respondents live in the pin drop map in Figure 2.9.

Figure 2.9: Pin Drop Map of Where Respondents Live

Can I ask you to give me your postcode?

Respondents living 5 or miles or more from Lewes come from a relatively wide range of different areas surrounding Lewes. In addition, there are some outliers to the above map which come from places as far as Somerset, Leicestershire, Lancashire and Yorkshire.

2.12 Respondents' main reason for visiting Lewes on the day they were interviewed is detailed in Table 2.1 together with additional reasons for visiting Lewes. Figures for additional reasons do not sum to 100% because respondents could choose more than one option.

Table 2.1: Main Reason and Additional Reasons for Visiting Lewes

What is your main reason for visiting today?
And what additional reasons do you have for visiting today?

Reason	Main Reason	Additional Reasons
Shopping	50%	21%
Using services (e.g. post office, bank, hairdresser, beauty, osteopath or financial services, doctors, dentist etc)	12%	6%
Just looking around town	11%	13%
Visiting friends or relatives	9%	6%
Other social or leisure	6%	10%
Eating/drinking out	5%	29%
On your way to work or study	4%	2%
Travelling through	2%	2%
Using public amenities (courts, police station, library etc)	1%	1%
Another reason	0%	2%
None	-	36%
Base	**309**	**309**

Respondents' main reason for visiting Lewes was most commonly for shopping (50%), followed to a significantly lesser extent by using services (12%) and just looking around town (11%). Other reasons represented fewer than 10% of responses in each case.

When asked to give additional reasons for visiting Lewes, 36% said there were no other reasons. However, 29% said they also visited Lewes for eating or drinking out, 21% for shopping, 13% for just looking around town and 10% for other social or leisure. Other additional reasons given represented fewer than 10% of respondents in each case.

2.13 Table 2.2 details the areas and shops that respondents indicated they were visiting on the day of the interview. Figures do not sum to 100% due to multiple responses being allowed.

Table 2.2: Areas / Shops Visited

Which of the following areas/shops are you visiting today?

Area / Shop	%
The pedestrianised Precinct/Cliffe High Street (and off of here)	88%
School Hill / High Street (up the Hill from opposite Boots)	71%
Waitrose	16%
Needlemakers and off the upper High Street	12%
Tesco	7%
Aldi	2%
Western Road shops	1%
Other retailers on Brooks Street (edge of town)	1%
Base	**308**

The vast majority of respondents were visiting the pedestrianised precinct on Cliffe High Street (88%) during their visit to Lewes, followed by 71% that were visiting School Hill on High Street. Fewer (though still a significant proportion) were visiting each of Waitrose (16%) or Needlemakers (12%) and fewer than 10% were visiting Tesco (7%), Aldi (2%), Western Roads shops (1%) or other retailers on Brooks Street (1%).

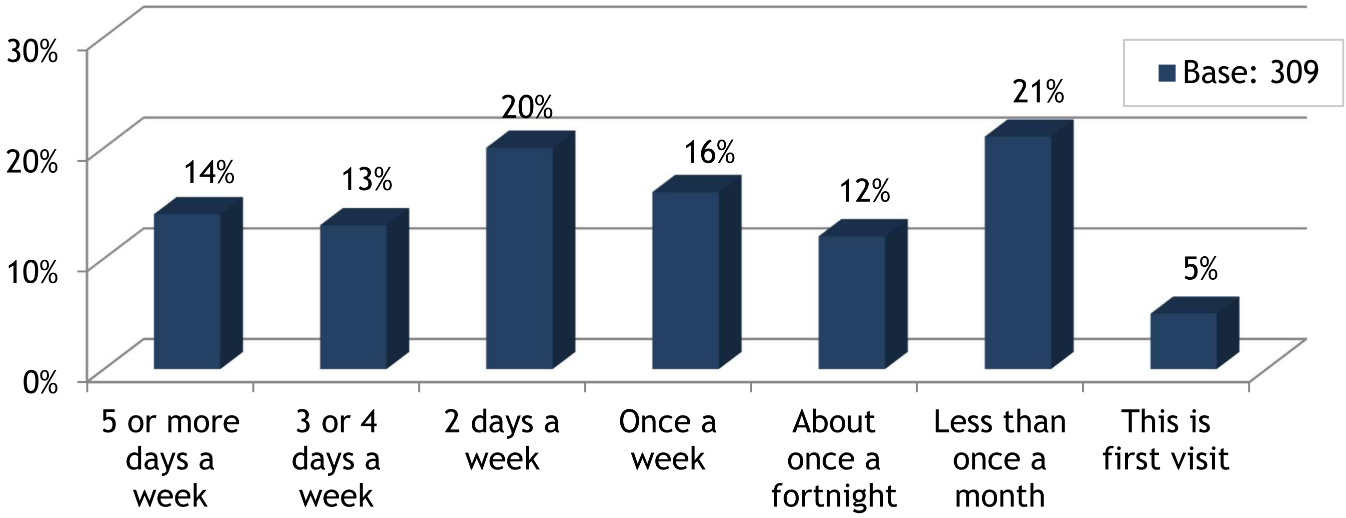
The vast majority of respondents interviewed in the School Hill / High Street area (76%) said they were also visiting the pedestrianised Precinct / Cliffe High Street area. By contrast, only 38% of those interviewed in the Precinct / Cliffe area said they were also visiting the School Hill / High Street area.

Visitors aged 45 to 74 and female visitors are slightly more likely than average to visit the Precinct / Cliffe area while visitors aged 24 to 44 and male visitors are slightly more likely than average to visit the School Hill / High Street area.

2.14 The frequency with which respondents visit Lewes, excluding trips to visit supermarkets, is illustrated in Figure 2.10.

Figure 2.10: Frequency of Visits (Excluding Trips to Supermarket)

Excluding trips solely to visit supermarkets, how often do you usually visit this area?



The majority of respondents say they visit Lewes at least once a week for reasons other than to shop in supermarkets (63%). A further 12% visit at least once a fortnight and 21% visit less often. The remaining 5% of respondents were visiting Lewes for the first time.

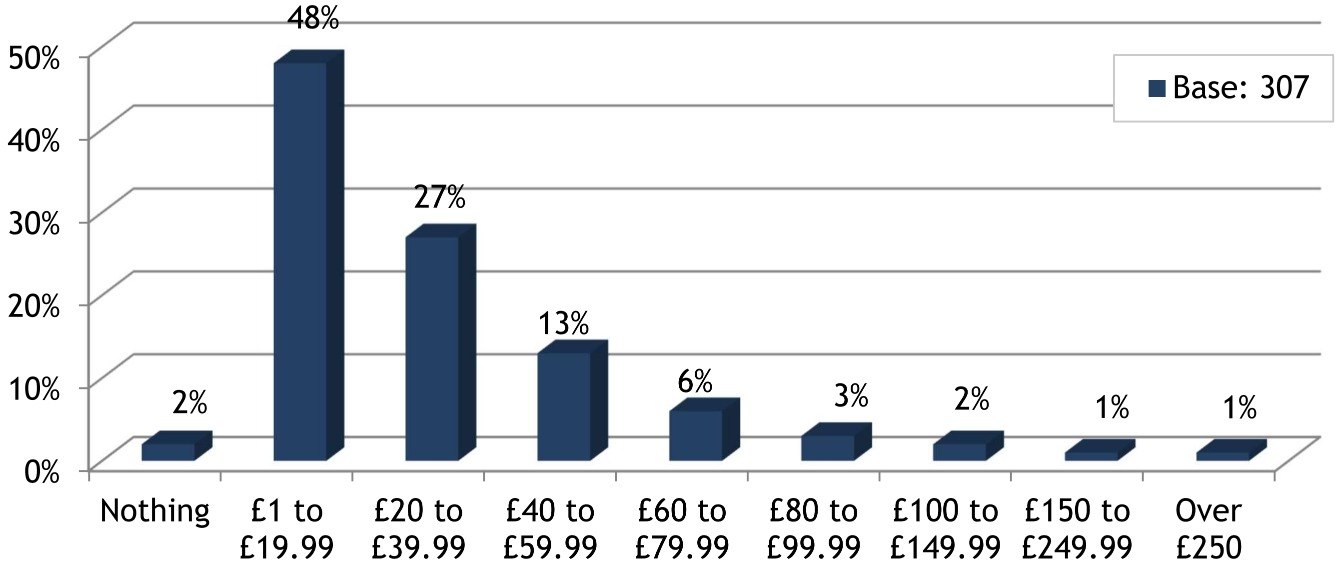
Visitors interviewed in the Precinct / Cliffe area were slightly more likely to visit the area at least once a week (68%), compared with those interviewed in the School Hill / High Street area (60%).

Male respondents were significantly more likely than female respondents to visit the area at least once a week (61%, compared with 46%).

2.15 Figure 2.11 illustrates the amount respondents say they usually spend on a visit to Lewes, specifically in the areas of Precinct / Cliffe and School Hill / High Street including individual shops, market stalls, takeaways, visits to the Castle Museum etc. and excluding expenditure at supermarkets and edge of town retail such as Homebase and Majestic Wine.

Figure 2.11: Typical Spend on Visit to Lewes

Approximately, how much money do you usually spend when you visit this area (or do you expect to spend if this is your first visit here)? For this question, we would ask you to include all shops and services in the areas of Precinct / Cliffe and School Hill / High Street including individual shops, market stalls, takeaways, visits to the Castle Museum and so on but NOT including expenditure at supermarkets and edge of town retail such as Homebase and Majestic Wine.



Taking the mid-point values from the above expenditure bands and assuming "over £250" as £250 we have calculated the average spend per visit to be £30.47. It is notable, however, that the average spend amongst a very significant proportion of the sample (48%) was under £20.

2.16 To further understand spend patterns, we have undertaken an analysis of weekly spend by method of travel to Lewes. In doing so, we have extrapolated the responses given for frequency of visit to estimate an average number of weekly visits and have taken the mid-points of average spend and applied these figures to the estimated number of visits.[4]

The results of this analysis are set out in Table 2.3 over the page:

[4] We have assumed a response of 5 or more days per week as 5 days and of less than once a month as once every eight weeks.

Table 2.3: Average Weekly Spend by Method of Travel

Method of Travel	Average Weekly Spend (£)	Base
Bicycle	£30.71	7
Bus	£43.94	20
Car	£31.18	145
Foot	£65.00	102
Taxi	£40.00	3
Train	£12.27	16
All respondents	**£42.87**	**293**

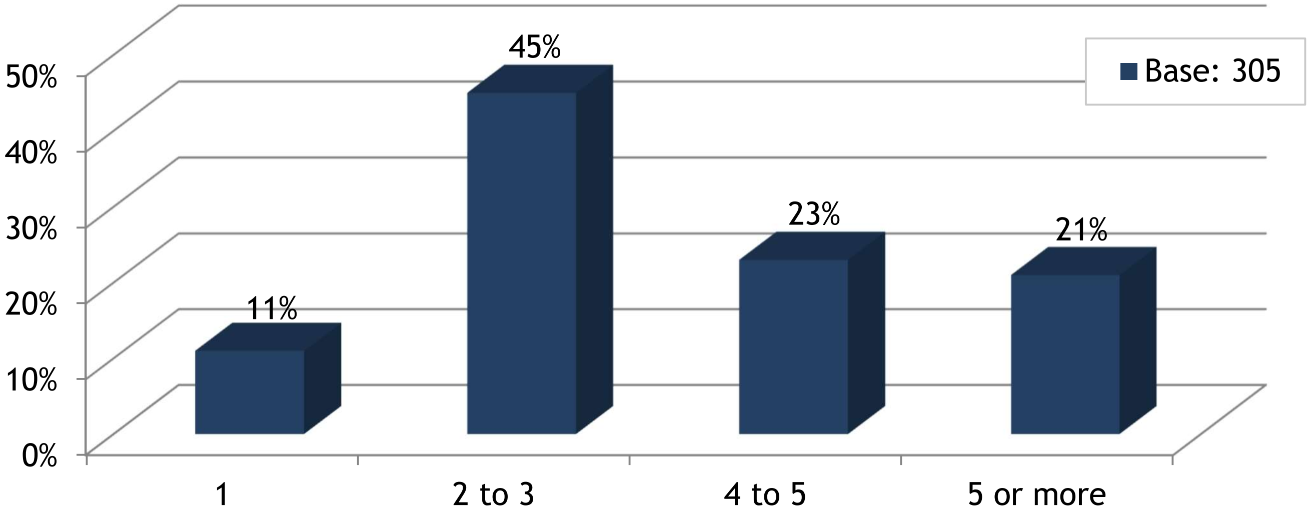
There is a notable finding here in that the average weekly spend amongst those that had travelled by foot on the particular day of interview is higher than that for other modes of travel, including travel by car (£65,00 compared to £31.18).

This pattern is largely driven by number of visits. Amongst those that had arrived by car on the day of interview, the average number of visits per week was 1.16 whereas amongst those that had arrived by foot the average number of visits per week was 3.08.

2.17 Again, excluding supermarkets and edge of town retail, the number of shops or premises that respondents say they usually visit is illustrated in Figure 2.12 over the page.

Figure 2.12: Number of Shops / Premises Usually Visited

How many shops/premises do you usually visit in this area, EXCLUDING supermarkets and edge of town retail such as Homebase and Majestic Wine?



Most commonly, respondents visit 2 to 3 shops or premises when they visit the Precinct / Cliffe and School Hill / High Street areas (45%), although a significant proportion say they visit 4 to 5 shops or premises (23%) or visit 5 or more shops or premises (21%).

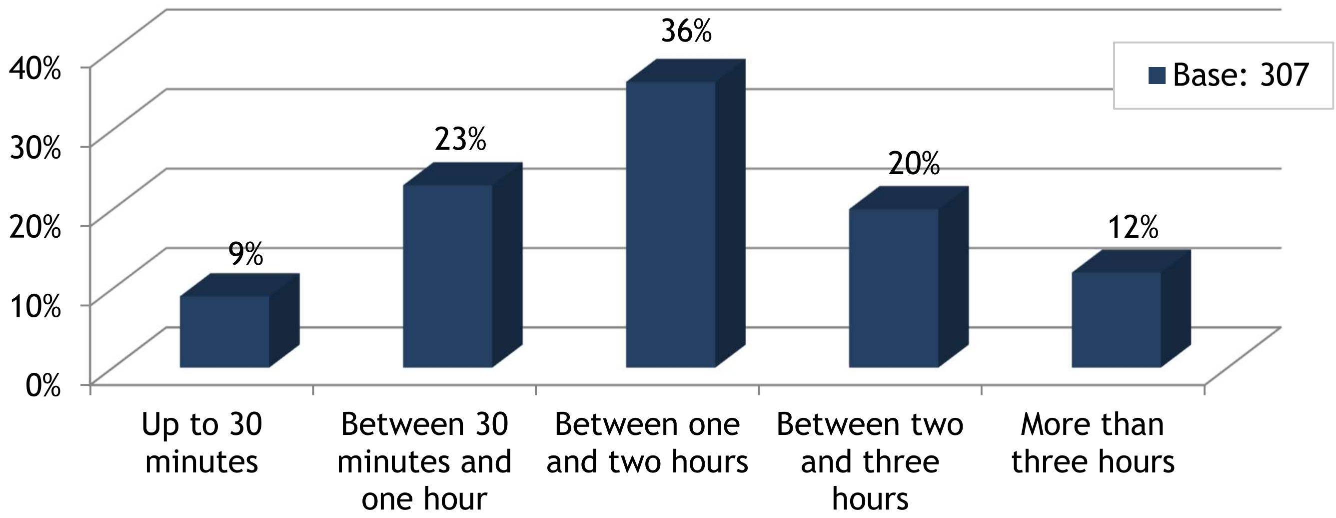
The number of shops visited does not vary greatly by interview location with 48% of those interviewed in the Precinct / Cliffe area visiting 2 to 3 shops and 42% of those interviewed in the School Hill / High Street area visiting 2 to 3 shops. Those interviewed in the School Hill / High Street are slightly more likely to visit 4 or more shops (46%), compared with those interviewed in the Precinct / Cliffe area (41%).

Female respondents were slightly more likely than male respondents to visit more than one shop (92%, compared with 84%).

2.18 Figure 2.13 over the page illustrates how long respondents say they usually spend in the area, again excluding time at supermarkets and edge of town retail.

Figure 2.13: Usual Time Spent in Area

Approximately how long do you usually spend in this area excluding time spent in supermarkets and edge of town retail such as Homebase and Majestic Wine?



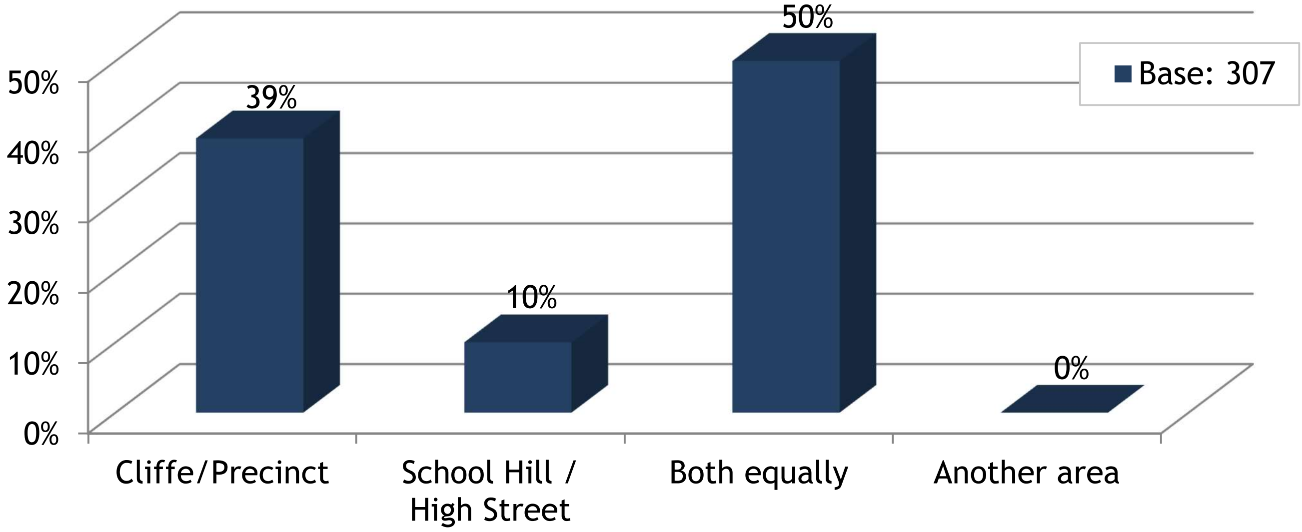
Taking the mid-point values from the above time bands and assuming "More than three hours" as three hours we have calculated the average time spent per visit ("dwell time") to be 96 minutes.

Average dwell time is slightly higher among respondents interviewed in the School Hill / High Street area (98 minutes), when compared to those interviewed I the Precinct / Cliffe area (92 minutes).

2.19 The areas that respondents usually spend most of their time are illustrated in Figure 2.14 over the page.

Figure 2.14: Area Visitors Spend Most Time

Which of these two shopping areas do you usually spend most of your time visiting?



Half of respondents spend equal amounts of time in the Cliffe / Precinct area and the School Hill / High Street area, while a large minority (39%) spend most of their time in the Cliffe / Precinct area. Comparatively fewer spend most of their time in the School Hill / High Street area (10%).

The majority interviewed in the School Hill / High Street area said that they spend most of their time equally between the Cliffe / Precinct area and the School Hill / High Street area (56%). By comparison, the majority of those interviewed in the Cliffe / Precinct area said they spend most of their time in the Cliffe / Precinct area (55%).

2.20 Respondents were then asked to say *why* they spend most of their time in either in the Cliffe / Precinct area, the School Hill / High Street area or both areas. An illustrative selection of comments under each location are listed in the table over the page:

Location	Comment
The pedestrianised Precinct/Cliffe High Street	*"Flat and less traffic."* *"Pedestrianised."* *"More shops."* *"More going on down here and no free parking up the top."*
School Hill / High Street	*"Has the shops I need."* *"More independent stores."* *"Shops are better."*
Both	*"Different shops."* *"Enjoyable places to visit and meet friends etc."* *"Nice shops, interesting place."*

Comments amongst those that spend most of their time in the Cliffe / Precinct area related to the variety and number of shops, as well as practical issues such being flat, pedestrianised and having free parking. Comments amongst those that spend most of their time in the School Hill / High Street area tended to reflect the specific shops and the independent stores available in that area that meet the needs of individuals. Amongst those the use both areas equally, comments tended to note that both have different things to offer such as different shops and places to meet friends and family.

A full listing of verbatim comments to this question can be found in Appendix 3.

2.21 A number of suggested changes to Upper High Street were read out to respondents who were then asked to say whether they thought these changes would make things better, worse or have no change. The results are detailed in Table 2.43, ordered by the proportion of respondents that answered "better".

Table 2.4: Suggested Changes to Upper High Street

Please say whether you think the following changes to the upper High Street would make things better or worse (or no real change).

Suggested Change	Better	No Change	Worse	Base
More planting	76%	20%	3%	302
Hop on/off bus going up and down the High Street	68%	21%	11%	276
More bench seating on pavements	66%	27%	7%	300
Wider pavements in some places	61%	28%	10%	297
Reduced vehicle traffic	56%	32%	13%	292
More cycle parking stands	56%	22%	22%	281
More tables and chairs outside cafés	51%	39%	10%	301
Slower traffic speeds	49%	38%	14%	296
More pedestrian crossings (informal, zebras or light controlled)	47%	37%	16%	287
Taking out some of the paid on-street parking bays (but allowing vehicle access for pick-ups, deliveries and disabled)	45%	28%	27%	272
Addition of a cycle lane down School Hill	41%	22%	38%	274
Measures to slow/reduce through-traffic on the High Street (e.g. narrowing of the carriageway at points)	37%	29%	33%	284
A ban on through traffic	36%	23%	41%	279

The majority of respondents think that more planting would be a positive change in the upper High Street area (76%), followed by a hop on / off bus going up and down the High Street (68%), more bench seating on pavements (66%) and wider pavements in some places (61%).

Other changes, where a majority of respondents gave a "better" response included reduced vehicle traffic (56%), more cycle parking stands (56%) and more tables and chairs outside cafes (51%).

Somewhat fewer respondents responded "better" in relation to each of slower traffic speeds (49%), more pedestrian crossings (45%), the addition of a cycle lane down School Hill (41%) and measures to slow / reduce traffic on the High Street (37%). In each case, however, the proportion of people giving a "better" rating was higher than the proportion giving a "worse" rating.

The only option where a higher proportion gave a “worse” rather than “better” rating related to a ban on through traffic (36% better compared to 41% worse).

2.22 Where respondents provided further comment on suggested changes to the upper High Street area, we have listed a selection of comments under specific themes below:

Theme	Comment
Traffic Issues	*“A town always needs cars to survive.”* *“Ban on traffic will kill town.”* *“Cars bring people in. Cycling is for outside town.”* *“Cycle lane will impact on parking.”*
Other	*“More pedestrianised areas.”* *“Not enough parking bays.”* *“Be lovely to have it modernised.”* *“More greenery.”*
General	*“Do things that can be cost effective and don't ruin the place.”* *“Get on with it.”* *“All sounds good ideas.”*

Comments most commonly related to the potential change of banning through-traffic and the perceived problems this would cause for local businesses.

Again, these comments are listed in full in Appendix 3.

2.23 Respondents provided other suggestions to make the upper High Street area more attractive and again we have listed a selection of comments under specific themes in the table over the page:

Theme	Comment
Appearance / Landscaping improvements	"Bunting across High Street." "I like the idea of more planting and benches." "More planting." "More trees"
Traffic Issues	*"Could stop on street parking but where do they go?"* *"Cycle lane makes it easier for cyclists."* *"Finding balance between people and vehicles in this town."* *"Way too much traffic."* *"Just enforce speed limit."*
Facilities	*"Benches on school hill as it steep."* *"More litter bins in Lewes in general."*
Shops	*"Fill empty shops."* *"Just more craft shops."*

Comments were diverse, but most often related to further enhancing the appearance of the town and to aspects of parking and traffic management.

2.24 Respondents were then asked what other changes, if any, they would like to see in the High Street or any other part of Lewes, including new shops, cafés, services, attractions, spaces, deliveries. Again, we have listed a selection of comments under specific themes in the table over the page:

Theme	Comment
Shops	"Better shops." "Better shops clothing especially younger age." "Better shops more big names." "Bring back more independent shops." Fill empty shops with local businesses."
Transport / Parking	*"Cheaper and more parking."* *"Could be good to exclude lorries vans to certain time zones."* *"Hop on / off electric buses up the hills."* *"More cycle lanes."*
Other	*"Cost of houses needs to come down for younger generation."* *"Just more seating around."* *"Less litter."* *"More hanging baskets outside pubs and shops."* *"More information signage."*

Comments often related to the desired variety of shops, including a mix of chain stores as well as independent stores, and ensuring that empty shops are filled Different aspects of traffic management, including reducing heavy traffic, cycle lanes, parking issues and hop on / off transport were also reflected in the comments.

Again, these are listed in full in Appendix 3.

2.25 28% of respondents say they would be interested in using an electric delivery service (van or bike) from the independent shops in Lewes while the majority (58%) would not. A further 13% are not sure and fewer than 1% claim to already use one.

Interest in such a service is higher amongst male respondents (34%) compared with female respondents (25%). The service also tends to be more likely than average to appeal to younger age groups with interest in 47% of 25-34 year olds and 39% of 35-44 year olds.

Key Points in Relation to Visitor Survey

Respondents mainly travel to Lewes by car (51%) or on foot (34%).

Those travelling by car most commonly use a paid car park (48%), followed by a supermarket car park (39%).

The average distance travelled by respondents visiting Lewes is estimated to be at least 4.34 miles, but with this reflecting a mix of many people that live very close to the centre of Lewes and many others that live greater than 10 miles away.

Overall, respondents were broadly split between residents of Lewes or the outskirts of Lewes (54%) and residents living 2 miles or more from Lewes (47%).

The most common main reason given by respondents for visiting Lewes was shopping (50%), followed to a significantly lesser extent by using services (12%) and just looking around town (11%). Additional reasons given for visiting Lewes were eating or drinking out (29%), shopping (21%), just looking around town (13%) and other social or leisure (10%).

The vast majority of respondents had visited both the pedestrianised precinct on Cliffe High Street (88%) and School Hill on High Street (71%) on the day of interview. The vast majority of respondents interviewed in the School Hill / High Street area (76%) said they were also visiting the pedestrianised Precinct / Cliffe High Street area. By contrast, only 38% of those interviewed in the Precinct / Cliffe area said they were also visiting the School Hill / High Street area.

The majority of respondents say they visit Lewes at least once a week (63%) for reasons other than to shop in supermarkets. Visitors interviewed in the Precinct / Cliffe area were slightly more likely to visit the area at least once a week (68%), compared with those interviewed in the School Hill / High Street area (60%).

The average spend amongst respondents per visit to in the areas of Precinct / Cliffe and School Hill / High Street including individual shops, market stalls, takeaways, visits to the Castle Museum etc. but **excluding** expenditure at supermarkets and edge of town retail such as Homebase and Majestic Wine is £30.47. Amongst almost half of respondents (48%) the level of spend was under £20.

Key Points in Relation to Visitor Survey (continued)

When they visit the Precinct / Cliffe and School Hill / High Street areas, 45% of respondents indicate that they usually visit 2-3 shops (excluding supermarkets and edge of town retail) but with a further 23% saying they visit 4-5 shops and 21% that they visit more than 5 shops. The average time spent in the area ("dwell time"), excluding time spent at supermarkets and edge of town retail, is 96 minutes.

Half of respondents say they spend equal amounts of time in the Cliffe / Precinct area and School Hill / High Street areas while visiting Lewes, though a substantial minority (39%) say they spend most of their time in the Cliffe / Precinct area and comparatively fewer say spend most of their time in the School Hill / High Street area (10%).

Potential changes that respondents were most likely to think would make a positive change in the upper High Street area are more planting (76%), a hop on / off bus going up and down the High Street (68%), more bench seating on pavements (66%) and wider pavements in some places (61%). A majority also think that the area would be made better by reduced vehicle traffic (56%), more cycle parking stands (also 56%) and more tables and chairs outside cafes (561%. The only option where a higher proportion gave a "worse" rather than "better" rating related to a ban on through traffic (36% better compared to 41% worse).

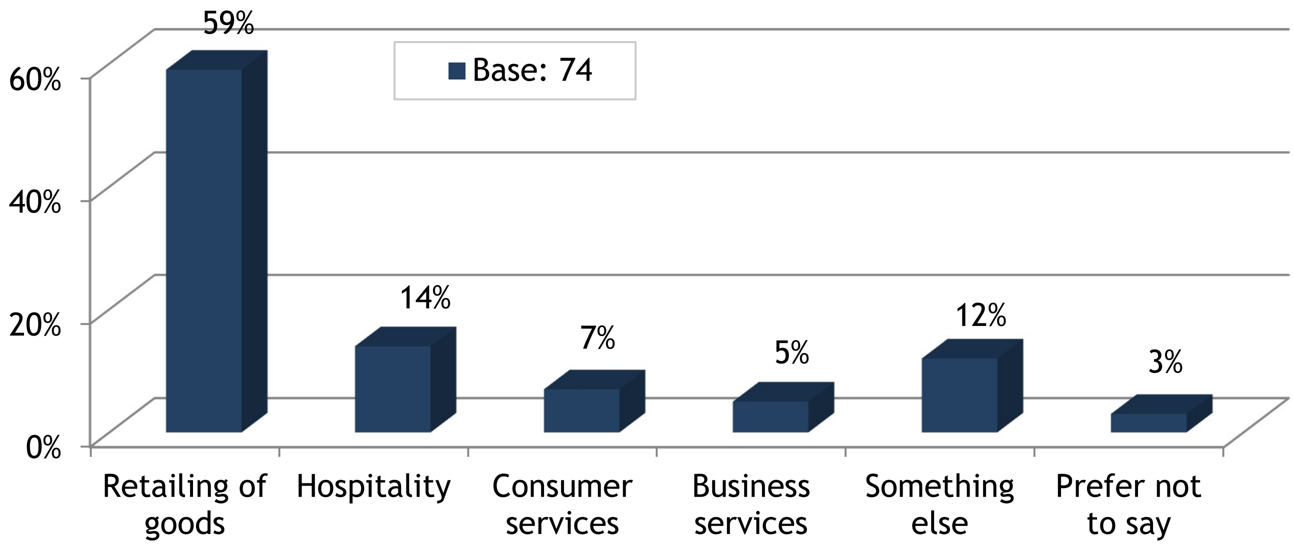
A significant minority of respondents (28%) would be interested in using an electric delivery service (van or bike) from the independent shops in Lewes. Interest in such a service is higher amongst male respondents (34%) compared with female respondents (25%). The service also tends to be more likely than average to appeal to younger age groups with interest in 47% of 25-34 year olds and 39% of 35-44 year olds.

3.0 Business Survey

Respondent Profile

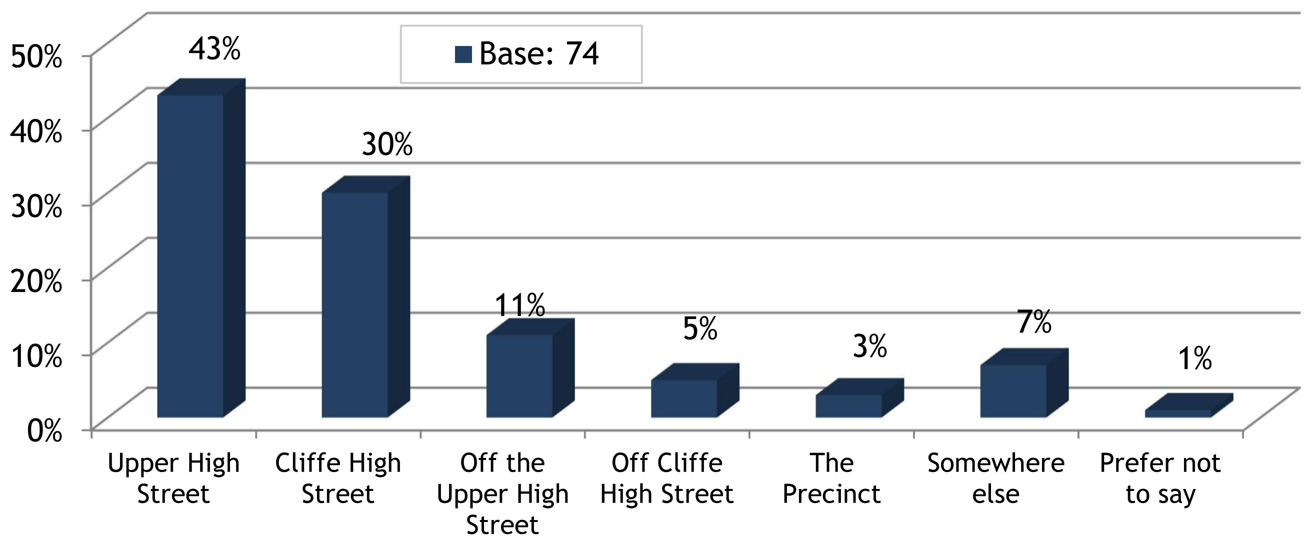
3.1 The profile of respondents by type of business is illustrated in Figure 3.1. This shows that respondent businesses were most commonly retailers.

Figure 3.1: Business Type



3.2 Figure 3.2 illustrates that respondent businesses were most commonly located on upper High Street and Cliffe High Street.

Figure 3.2: Business Location



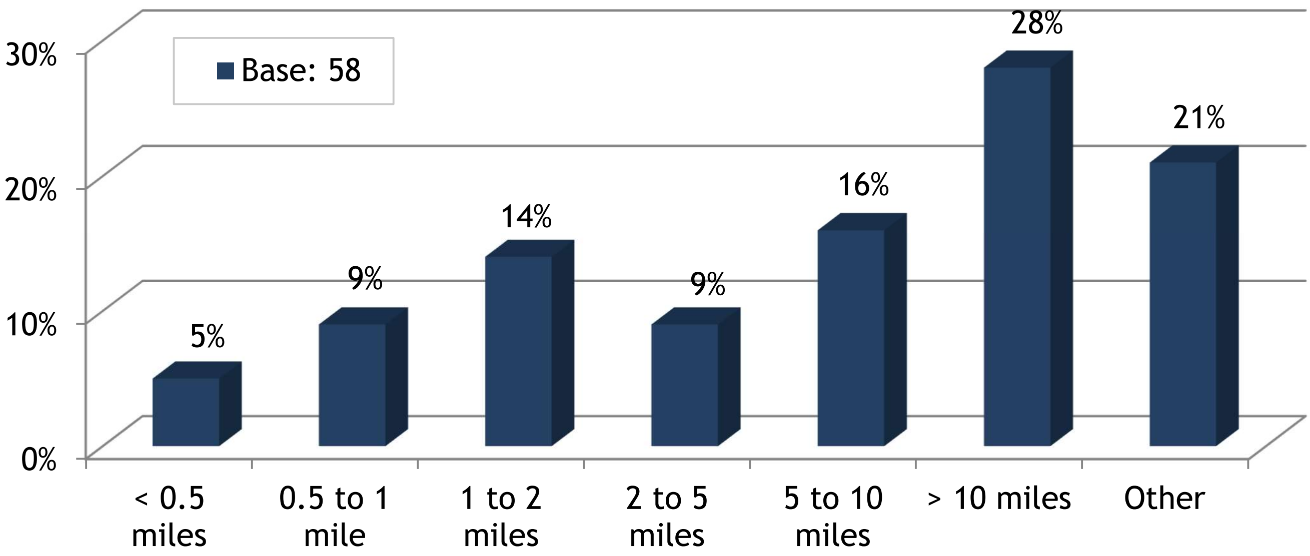
3.3 Given the relatively small sample size, we have broken down the sample by business type into retailing and "other". We have also broken down the sample into three broad categories by location, these being Upper High Street, Cliffe High Street and other locations together. Results broken down in this way are included as Appendix 5 and a full listing of the open-ended responses is included as Appendix 6.

Business Survey Findings

3.4 Business respondents' perception of the distance customers usually travel to get to the centre of Lewes is illustrated in Figure 3.3.

Figure 3.3: Distance Travelled

What distance would you say your customers most often travel to get to the centre of Lewes?



Taking the mid-point values from the above mileage bands and assuming "more than 10 miles" as 10 miles, we have calculated the average distance travelled amongst respondents to be 5.68 miles (compared to an estimated figure of 4.34 miles in the visitor survey).

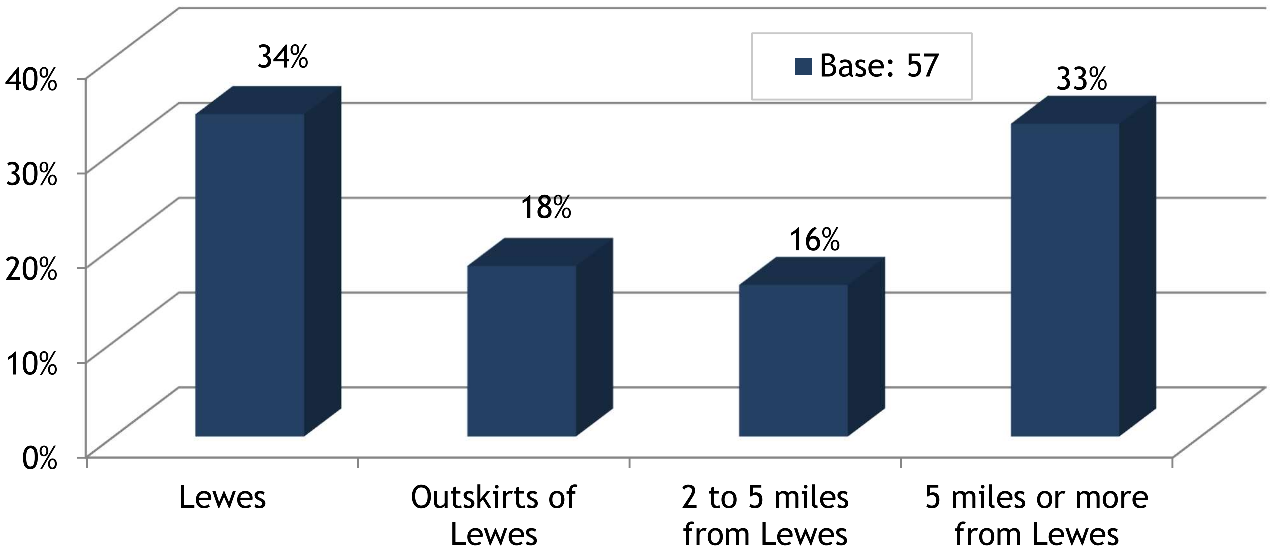
"Other" comments mainly highlighted the difficulties estimating the distance travelled as customers are local and from the surrounding area, but also from further afield, including nationwide and worldwide (and it is not always possible for businesses to estimate this accurately).

Even allowing for this high "other" response, these figures would suggest that businesses underestimate the total proportion of "local" customers in that the visitor survey showed 37% of visitors to come from less than one mile from the centre of Lewes and a total of 47% from within 2 miles whilst the figures estimated by business respondents, after taking out the "other" responses were 18% and 35% respectively.

3.5 As with the business survey, respondents were shown a map of Lewes. Whilst visitors were asked to indicate which area they came from, businesses were asked to indicate what proportion of their customers they thought came from each area and, from this, we have estimated average figures, which are set out in Figure 3.4.[5]

Figure 3.4: Where Customers Come From

Looking at the following map of Lewes and the surrounding areas, approximately what proportion (%) of your customers would you say come from each area? Please put a % figure next to each area to add to 100% (average figures calculated by IBP)



As shown above, businesses estimate that customers are broadly split between residents of Lewes or the outskirts of Lewes (52%) and residents living 2 miles or more from Lewes (49%).

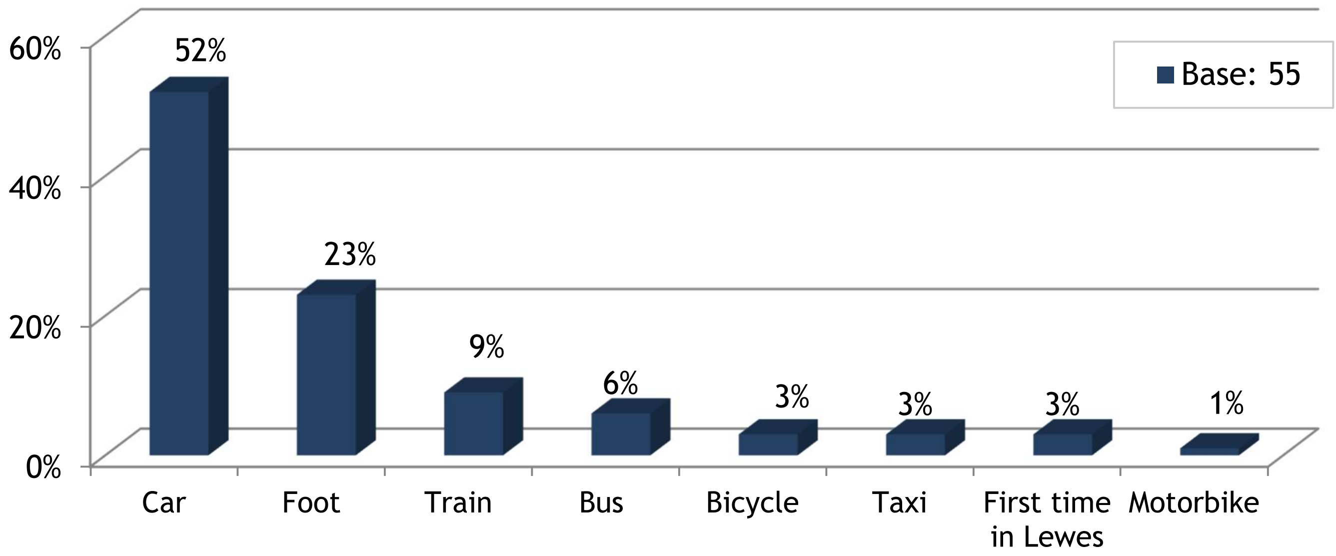
[5] These figures do not take account of the potential for figures to be affected by there being different sizes of business, as we do not have this data. Figures based only on those businesses that provided a useable response.

When presented in this way, the figures provided by businesses are actually very much in line with the "actual" figures recorded in the visitor survey. The figures given above (34%. 18%, 16%, 33%) compare to figures from the visitor survey of 37%, 17%, 13% and 34%).

3.6 Figure 2.4 illustrates business respondents' perception of the estimated proportion of customers that travel to Lewes by each form of transport (again, this is based on IBP's analysis of write-in % responses and excludes "don't know" responses).

Figure 2.4: Main Method of Customer Travel

Approximately what proportion (%), of your customers would you say travel to Lewes by each of the following modes of transport? Please put a % figure next to each area to add to 100%.



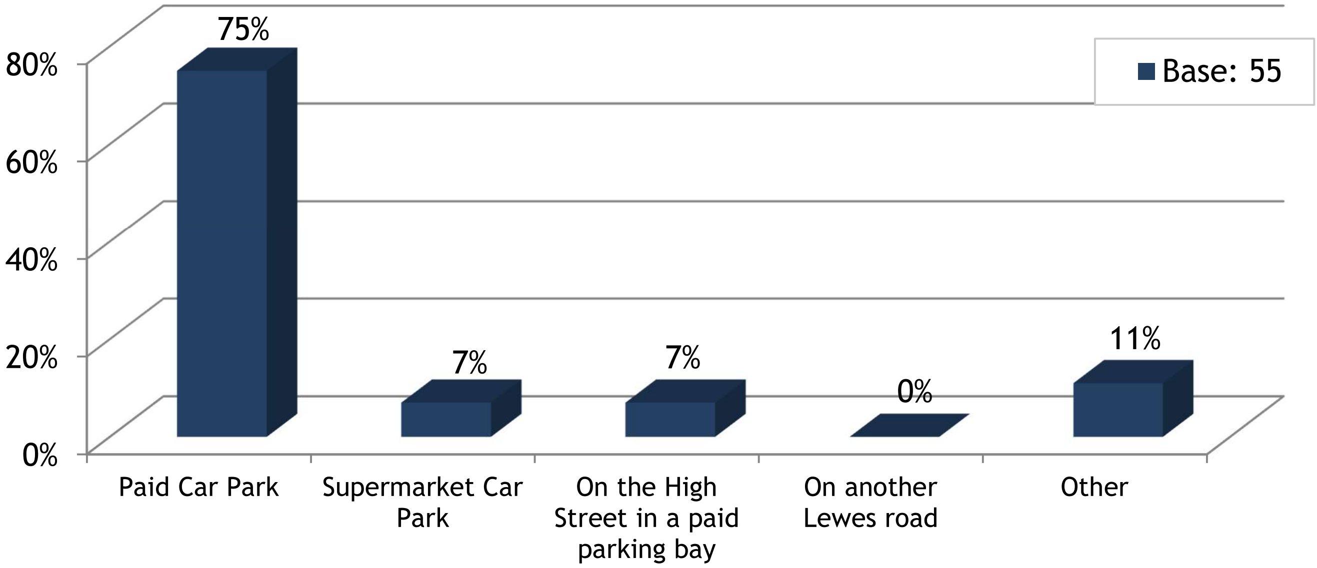
Businesses estimate that customers most commonly travelled to Lewes by car (52%), followed by a significant minority that travel on foot (23%). Other methods of travel represented less than 10% in each case.

Again, these figures were broadly comparable with those found in the visitor survey, where 51% of visitors travelled by car but it is noted that businesses felt that 23% of their customers came by foot, compared to a figure of 34% that was recorded in the visitor survey.

3.7 Figure 3.6 sets out business perceptions as to where those respondents that arrive by car most often park.[6]

Figure 3.6: Most Common Parking Locations of Customers

For those customers that travel by car, where do they most often park?



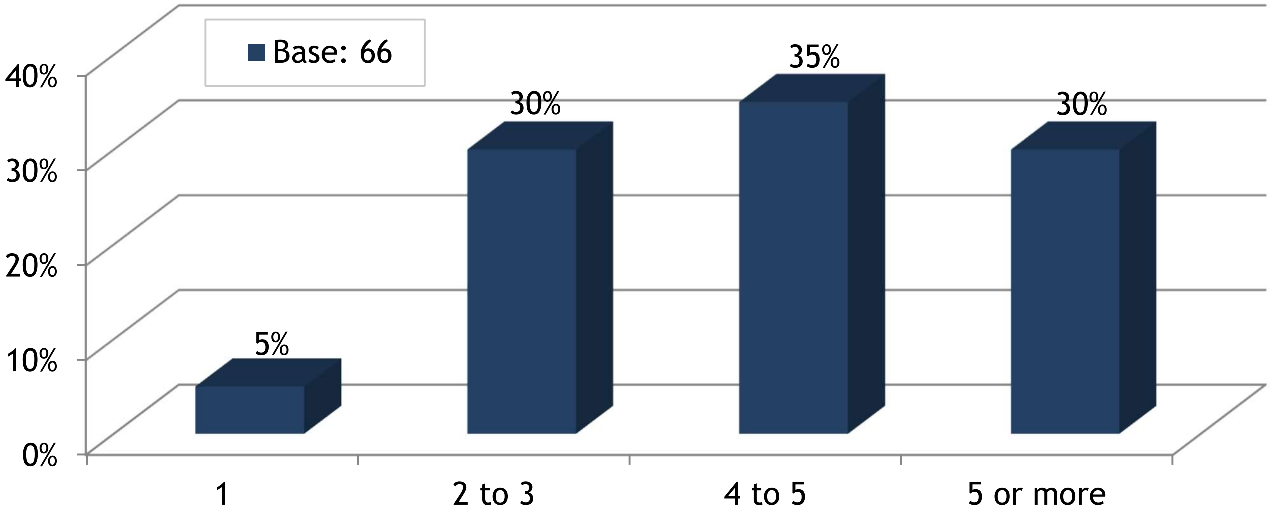
Businesses estimate that the majority of their customers park in a paid car park (75%) while comparatively fewer park elsewhere. This contrasts somewhat with the visitor survey where respondents most commonly said they parked in a paid car park (48%) but where a very significant proportion indicated that they parked in a supermarket car park (39%); the extent of the latter seems to be somewhat under-estimated by businesses.

[6] "Other" responses could not be allocated to one of the prompted categories and are listed in full in the appendices.

3.8 Excluding supermarkets and edge of town retail, the number of shops or premises that businesses say their customers usually visit when they come to Lewes shops is illustrated in Figure 3.7.

Figure 3.7: Number of Shops / Premises Customers Usually Visit

In your opinion, how many other businesses do you think MOST of your customers will visit when they come to Lewes shops (excluding supermarkets and edge of town retail/services)?



Most commonly, respondents estimate that their customers visit 4 to 5 shops or premises when they visit Lewes, excluding supermarkets and edge of town retail (35%), although a significant proportion say they visit 2 to 3 shops or premises (30%) or visit 5 or more shops or premises (30%). These figures are not strictly comparable to the visitor survey figures as they relate to "other" shops than that of the business themselves (where this is a retailer) and, allowing, for this, business perceptions are at least broadly in line with the figures from the visitor survey. In that survey, 45% indicated that they visited 2 to 3 shops, 23% that they visited 4-5 shops and 21% that they visited more than 5 shops.

3.9 As with the visitor survey, the business survey set out suggested changes to the upper High Street and respondents were then asked to say whether they thought these changes would make things better, worse or have no change. These results are detailed in Table 3.1.

Table 3.1: Suggested Changes to Upper High Street

Please say whether you think the following changes to the upper High Street would make things better or worse (or no real change).

Suggested Change	Better	No Change	Worse	Base
More planting	75%	13%	12%	68
Hop on/off bus going up and down the High Street	65%	10%	25%	63
More tables and chairs outside cafés	60%	18%	22%	67
More bench seating on pavements	55%	28%	16%	67
Slower traffic speeds	51%	43%	6%	69
Reduced vehicle traffic	45%	22%	33%	67
More cycle parking stands	45%	34%	20%	64
More pedestrian crossings (informal, zebras or light controlled)	44%	27%	29%	66
Wider pavements in some places	42%	34%	23%	64
Measures to slow/reduce through-traffic on the High Street (e.g. narrowing of the carriageway at points)	30%	17%	52%	69
Taking out some of the paid on-street parking bays (but allowing vehicle access for pick-ups, deliveries and disabled)	30%	11%	59%	64
Addition of a cycle lane down School Hill	22%	14%	64%	59
A ban on through traffic	17%	8%	76%	66

Businesses most commonly felt that more planting would be a positive change in the upper High Street area (75%), followed by a hop on / off bus going up and down the High Street (65%), more tables and chairs outside cafes (60%), more bench seating on pavements (55%) and slower traffic speeds (51%).

Other changes where a higher proportion of businesses gave a “better” rather than “worse” response included reduced vehicle traffic (45% compared to 23%), more cycle parking stands (45% compared to 20%), more pedestrian crossings (44% compared to 29%) and wider pavements in some places (42% compared to 23%).

Amongst business respondents, certain of these suggestions were considered more likely to make things "worse" rather than "better", including measures to slow or reduce through-traffic on the high street (30% better, 52% worse), taking out some of the paid on-street parking bays (30% better, 59% worse), addition of a cycle lane down School Hill (22% better, 64% worse), and a ban on through traffic (17% better, 76% worse.)

3.10 In order to compare visitor and business perceptions in relation to each of the above elements, Table 3.2 below sets out the "net support" for each element by respondent category.[7] [8]

Table 3.2: Suggested Changes to upper High Street - comparison

Suggested Change	Visitors - net support	Businesses - net support
More planting	+73%	+63%
Hop on/off bus going up and down the High Street	+57%	+40%
More bench seating on pavements	+59%	+39%
Wider pavements in some places	+51%	+9%
Reduced vehicle traffic	+43%	+12%
More cycle parking stands	+38%	+25%
More tables and chairs outside cafés	+41%	+38%
Slower traffic speeds	+35%	+45%
More pedestrian crossings (informal, zebras or light controlled)	+31%	+15%
Taking out some of the paid on-street parking bays (but allowing vehicle access for pick-ups, deliveries and disabled)	+18%	-29%
Addition of a cycle lane down School Hill	+3%	-42%
Measures to slow/reduce through-traffic on the High Street (e.g. narrowing of the carriageway at points)	+4%	-22%
A ban on through traffic	-5%	-59%

It is notable that, with the exception of "slower traffic speeds" the level of support for each initiative is greater amongst visitors than it is amongst businesses (sometimes significantly so).

[7] By "net support" we are referring to the proportion that give a "better" response less the proportion that give a "worse" response.
[8] Results are ordered by "net support" within the visitor survey.

3.11 Respondents were then asked what other changes, if any, they would like to see in the High Street or any other part of Lewes, including new shops, cafés, services, attractions, spaces, deliveries. We have listed a selection of comments under specific themes below:

Theme	Comment
Transport	*"Cycle markings that link to paths and one way."* *"Electric charge points for vehicles."* *"Instead of a cycle lane on the very steep School Hill, improve a cycle route along the river, up St John's Hill, through to reach the top end of the High Street."* *"Lower speed limit."*
Parking	*"Stop closing Friars car park for farmer's market. This has had a big impact on sales."* *"Better and cheaper long-term parking around centre for our staff on customers."* *"Better parking for shopkeepers. There's not enough parking for shopkeepers and visitors."* *"Cheaper or free parking. Park and ride options."*
Shops / Services	*"Encouraging independent businesses. Ensuring a good variety. More cafes/restaurants."* *"Fewer coffee shops and fewer clothes shops."* *"More useful shops such as hardware stores or general purpose shops. Not just trendy fashion shops."* *"Independent grocers/greengrocers. Weekend pedestrianised High Street for outdoor eating."* *"Less vacant shops."*
Appearance / Landscaping	*"Clean up the street furniture and the appearance of the town, it is looking very run down indeed."* *"Community street gardens."* *"Improved Christmas decorations throughout the town. Empty shops should not be allowed to be neglected."* *"More planting and cleanliness. Make the street feel more welcoming."*

Comments mainly related to the transport issues including cycle routes, speed limits, charging points, improved parking, the variety of shops on offer and aspects of improving the overall appearance of the town.

A full listing of these comments is set out in the appendices.

3.12 14% of respondents say they would be interested in joining a local electric vehicle (cargo bike or van) delivery service and 31% say they might be interested. 56% indicated that they would not be interested in this.

Key Points in Relation to Business Survey

Business respondents' estimate of the average distance travelled by customers visiting Lewes is 5.68 miles, which is slightly higher than the 4,34 miles estimated in the visitor survey.

Businesses estimate that their customers are broadly split between residents of Lewes or the outskirts of Lewes (52%) and residents living 2 miles or more from Lewes (49%). Their perceptions of where their customers come from in this regard are broadly in line with the evidence from the visitor survey.

Businesses believe that customers mainly travel to Lewes by car (52%) or on foot (23%), which is again broadly in line with the evidence from the visitor survey, though appears to slightly underestimate the proportion that travel on foot.

Businesses perceive that the vast majority of their customers that travel by car use paid for car parks (75%) and that only 7% use supermarket car parks; this appears to underestimate the proportion that use supermarket car parks, which was recorded as 39% in the visitor survey.

Most commonly, businesses estimate that their customers visit 4 to 5 shops or premises when they visit Lewes, excluding supermarkets and edge of town retail (35%), although a significant proportion say they visit 2 to 3 shops or premises (30%) or visit 5 or more shops or premises (30%). Allowing for the question needing to be phrased in a slightly different way for businesses, their perceptions again appear to be broadly borne out by the feedback from the visitor survey.