

1. INTRODUCTION

1.1 Background

This report presents the draft findings from the programme of research undertaken by Tourism South East on behalf of the Countryside Agency.

The New Forest is the last surviving medieval landscape in lowland England. It is a mosaic of heaths, commons, ancient woodland, stream and river valleys, interspersed with scattered small-holdings, farms, hamlets, towns and villages. It is a living landscape, created and maintained in large part by the continuing practice of commoning. This is a system of pastoral land management which stretches back over centuries of unbroken tradition.

Much of the Forest is of national and international importance for nature conservation. This includes areas designated as candidate Special Areas of Conservation (cSAC) under the EC Habitats Directive, Special Protection Areas (SPA) under the EC Wild Bird Directive and Wetlands of International Importance under the Ramsar Convention. The cSAC and SPA at the heart of the Forest covers some 290 square kilometres and is one of the largest Natura 2000 sites in England.

The Countryside Agency (and its predecessor body, the Countryside Commission) has long recognised its special importance, and has a long history of involvement in promoting the integrated management and enhancement of the New Forest.

In 1992, the Countryside Commission, in partnership with twelve local authorities, set up the New Forest Committee (NFC) to co-ordinate the management of the New Forest Heritage area. The NFC is an independent non-statutory committee that co-ordinates the work of the main organisations involved in caring for the New Forest¹.

In 1992, the Agency decided to begin the process of designating the New Forest as a National Park by exercising its powers under the National Parks and Access to the Countryside Act 1949. In September 2001, the Agency agreed a draft boundary for the National Park and the options for the administration of a subsequent National Park Authority. Public consultation on these proposals was carried out between November 2000 and January 2001. Formal consultation with affected local authorities took place during the spring of 2002.

A New Forest National Park Boundary Designation Order was issued in January 2002, encompassing 670 square kilometres of the New Forest area, and was submitted to the Secretary of State for confirmation. A report from the public enquiry relating to the boundary and administration arrangements for the proposed National Park (October 2002 to April 2003) was submitted to the Secretary of State towards the end of 2003. The final decision to confirm the order and proceed with the establishment of a National Park was published on 28th June 2004 by the Rural Affairs Minister.

On 1st March 2005 the New Forest National Park (Designation) Order 2002 was confirmed and on 1st April 2005 a new National Park Authority (NPA) for the New Forest National Park was established under the provisions of the Environment Act 1995. The NPA currently has a limited range of statutory powers and functions but will become fully operational on 1st April 2006.

The Environment Act 1995 defines the statutory purposes of National Park Authorities (NPAs) as:

- (a) To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Parks; and
- (b) To promote opportunities for the understanding and enjoyment of the special qualities (of the Parks) by the public;
- (c) And a duty to have regard to the socio-economic well-being of the Park's communities.

¹ The NFC is no longer in operation

1.2 The need for research

In order to fulfil its statutory purposes as outlined above, it is essential that the New Forest National Park Authority has access to accurate information on visitor numbers, visitor profiles and visit characteristics. However, the dearth of utilizable local data has limited a comprehensive assessment of the demand for countryside recreation and access in the New Forest.

In recognition of the lack of information on visitors and the volume of visits to the proposed New Forest National Park, the Countryside Agency commissioned Tourism South East to undertake an extensive programme of research. This would include the collation of base data to assist with the development of a spatial planning model (MASOOR) designed to assess visitor patterns and density flows at specific sites. The research would also deploy a methodology, which would enable comparisons with the 1994 APVS and with the 2002-3 GBDVS.

1.3 Research Objectives

The objectives of the research were as follows:

- To identify the profile of visitors to the proposed New Forest National Park in terms of visitor type (i.e. local residents, leisure day visitors and staying visitors), age, gender, disability and socio-economic characteristics;
- To explore the characteristics of visits to the proposed New Forest National Park in terms of transport used, activities undertaken and facilities used;
- To identify the main reasons why people visit the New Forest, exploring whether the visit meets their expectations and their perceptions of particular aspects of their visit.
- To gather primary data identifying where people go, what routes and access points are used, and what activities are undertaken at specific locations².
- To produce reliable estimates of visitor volumes and their resultant economic impact, based on accurate local information on the characteristics of visits, visitor expenditure and other key information.

1.4 Overview of the research programme

1.4.1 Literature review

To establish what information already exists, and to assist with contextualising the findings, the first stage took the form of desk-top research. The search of existing research included earlier visitor surveys of the New Forest, other AONBs and national park visitor surveys. This was supplemented by a search through tourism/leisure journals and publications for other relevant studies to provide further insights.

1.4.2 Site based interview & observation survey

A comprehensive onsite observation survey was carried out at a total of 62 locations within the New Forest. Sites were selected by the Countryside Agency, Forestry Commission and partner organisations in order to provide a representative cross-section of site types (in terms of levels of use), user profiles and environmental/habitat sensitivity.

² This element of the research was undertaken specifically to produce data inputs for the MASOOR model and will not be reported on in this report.

Observation took place over the full 12 months of the year, covering weekdays, weekends and public holidays. Survey days were scheduled to be representative of the peak, shoulder and off-peak periods of the year. A total of 730 survey days of up to 12 hours duration (typically 8am until dusk) were completed.

Visitor movements were recorded manually, and referenced to outlined site plans. Information recorded included the date, location, time of day, direction people were travelling from and to, the mode of transport used, number of people in the group, the number of dogs, whether dogs were on or off a lead and presence of children within the group.

A face to face interview survey was undertaken over the same period in order to obtain information on the profile, origin, behaviour and perceptions of local, day and staying visitors to the New Forest. Visitors were sampled on a random basis at the same locations used for the observation survey, plus other key locations within the Forest. A total of 3,838 face to face interviews was achieved.

1.4.3 Household telephone interview survey

It is known that the New Forest is used extensively by local residents and those living in towns and villages immediately adjacent to the boundary for outdoor recreational activities such as walking, running, cycling, horse riding, walking the dog etc.

A telephone survey of households located within the National Park boundary and adjacent areas was undertaken to allow an assessment of the scale and nature of informal visits by local people.

The survey also included Bournemouth and Southampton as major urban conurbations neighbouring the New Forest. Telephone interviews were conducted with 2,164 households. Information was gathered on recreational visits made to the proposed New Forest National Park over the previous 12 months.

1.4.4 Additional research components

Additional research components were added to provide supplementary data to help provide insights into the way particular user groups use the New Forest, thus helping to build a better profile of recreational visitor patterns and volume of use by different visitor groups.

- **Educational visits survey.** The main aim of this survey was to establish the number and type of visits to the New Forest by educational establishments.
- **Organised visits survey.** This survey was undertaken to assess the level and nature of organised visits to the Forest
- **Visitor attractions survey.** Figures for visits to attractions within the boundary were collated for inclusion in the economic impact component of the study³.
- **Serviced & non-serviced accommodation occupancy surveys.** Occupancy data was obtained from a range of serviced accommodation providers within the Forest (hotels, guesthouses and B&Bs) and also from the non-serviced sector, including self-catering houses, cottages and flats and touring caravan and camping sites. The known accommodation stock of the Forest and occupancy data from accommodation providers forms the basis of the economic impact component of the study.

1.4.5 Volume and value economic impact modelling

Data from the aforementioned surveys, together with national and regional information from other sources were used to provide indicative estimates of the volume and expenditure of leisure visitors to the New Forest National Park and the

³ Data from attractions are not presented in this report. On their own they provide little meaningful data on the nature and scale of tourism activity in the New Forest.

numbers of jobs directly and indirectly sustained by visitor spending in the area. The research involved the application of bespoke version of the Cambridge Tourism Economic Impact Model or ‘Cambridge Model’⁴.

1.5 Structure of the report

The report begins in Section 2 with a literature review. The review was undertaken to determine what information existing surveys could provide, particularly regarding insights into the characteristics of key visitor markets. This includes a review of research methods that helped to inform the research strategy for this study.

Section 3 provides an overview of the research methods used for this study, and where relevant draws out some of our experiences to guide future research.

Key findings from each survey are presented in Section 4. Tabulated results for each survey are presented in Section 5.

Estimates on the overall volume and economic impact of recreational visits to the New Forest are presented in Section 6. This includes a description of the method used to quantify volume and value.

1.6 Interpretation of results and statistical accuracy

The results of some questions may not sum to 100% due to respondents being able to give more than one answer to the question. Sample sizes may differ from question to question where interviewees have not given a response to the question, or where the question has not been relevant to them. Where responses have been made by less than three people, these may not be included in the tabulated results, but marked as ‘other’. Where ‘0%’ is presented, this refers to less than 0.5% of the total sample response.

All sample surveys are subject to statistical error that varies with the sample size. The larger the sample, the greater the accuracy in the results. The degree of precision may be measured in terms of the expected level of variation from a given survey mean. Tables of margins of error based on the 95% confidence interval are available to help establish the relationship between sample size and statistical accuracy.

Table (i) shows the overall sample achieved for the interview survey and gives the margins within which one can be 95% certain that the true figures will lie (assuming the sample is random).

At 95% confidence interval		10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	Sample	+/-	+/-	+/-	+/-	+/-
Onsite survey						
All respondents	3,838	1.0	1.3	1.5	1.6	1.6
Household survey						
All respondents	2,164	1.3	1.7	1.9	2.1	2.1

This means, for example, that if 50% of the overall household survey sample are found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies in the range of +/- 2.1%, i.e. between 47.9% and 52.1%.

⁴ The detailed methodology of the model is not presented in this report.

1.7 Glossary of terms

Local day visitors from home: Day visitors to the New Forest from homes within postcode areas SO40, SO41, SO42, SO43, SO45, BH23, BH24, BH25, SP5 2, SP5 3, SP5 4, SP6 1, SP6 2, SO51 5 & SO51 6, i.e. within the National Park area or within approximately 5 miles of the boundary.

Other day visitors from home: Day visitors to the New Forest from homes outside the postcode areas outlined above, including Southampton, Bournemouth, Salisbury and further afield.

Staying visitor: Visitors staying overnight for at least one night in accommodation within the New Forest National Park area or elsewhere for leisure, business and/or social purposes. This includes those staying with friends or relatives.

Holidaymaker: A visitor staying away from home for leisure purposes.

Visit: A visit is defined as the use of a particular site for leisure purposes by a visitor or resident.

Visitor day - A day spent by day or staying visitor during which they visit a site or sites within the New Forest National Park area.

Trips: The number of people visiting or staying in the area. For day visitors, the number of trips will be the same as the number of day visits, but staying tourist trips will involve two or more days.

Great British Day Visits Survey (GBDVS): The survey measures the extent of participation in leisure day visits by the adult population. The leisure day visits survey was last conducted in 2002-3 and covered approximately 5,000 respondent interviews.

United Kingdom Tourism Survey (UKTS): The United Kingdom Tourism Survey provides basic headline data on the volume and value of domestic tourism at a national, regional and county level. It is based on 1,000 telephone interviews per week (50,000 annually).

International Passenger Survey (IPS): The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 210,000 interviews are undertaken each year. IPS provides headline figures, based on the county or unitary authority, for the volume and value of overseas trips to the UK.

Accommodation Occupancy Rates:

Room occupancy (%) = $\frac{\text{Total bedrooms occupied}}{\text{Total bedrooms available}} \times 100$

Bedspace occupancy (%) = $\frac{\text{Total bedspaces occupied}}{\text{Total bedspaces available}} \times 100$

Unit/pitch occupancy (%) = $\frac{\text{Total units/pitches occupied}}{\text{Total units/pitches available}} \times 100$

1.8 Funding & acknowledgements

This research was funded by the Countryside Agency. We would like to thank the many individuals who through the provision of information, comment and local knowledge have helped us in the delivery of this research.

1.9 Definition of the New Forest

For the purpose of this report, the phrase 'the New Forest' should be taken to mean the area within the New Forest National Park boundary. This includes parts of New Forest District, Test Valley Borough and Salisbury District.