

#### 4. PRESENTATION OF KEY FINDINGS

##### 4.1.3 Visitor profile & social characteristics

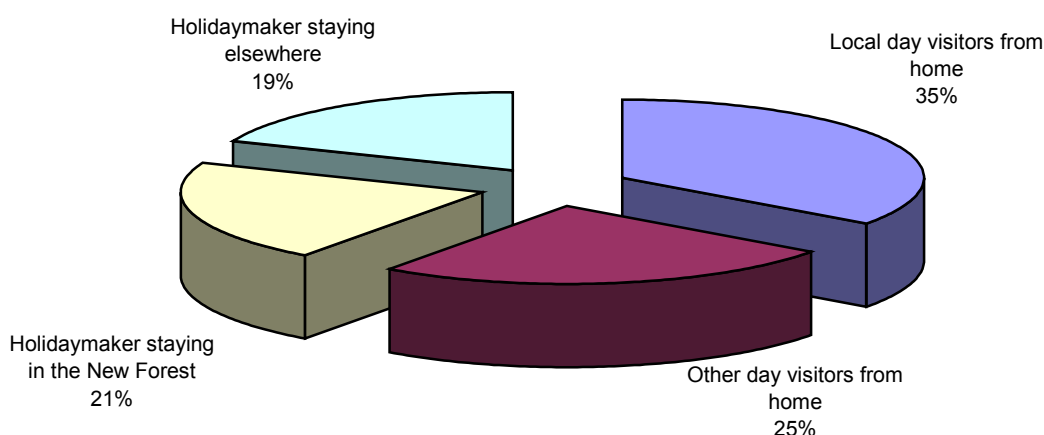
##### 4.1.3 Visitor type

On average, 40% of all visitors interviewed at the survey sites were on holiday, staying away from home. This included 21% of all visitors who were staying overnight within the New Forest and 19% who were staying overnight elsewhere.

The remaining 60% of all visitors surveyed at the survey sites were day visitors from home. Local day visitors from home accounted for 35% of all visitor groups interviewed at the survey sites, while visitors who had travelled to the New Forest for the day from homes in Bournemouth, Southampton and further afield accounted for 25% of all visitors.

The 1994 APVS found that holiday makers were the dominant visitor type, representing 55% of all visitors to the New Forest. The recent survey results indicate a contraction in the size of the holiday market and an increase in the size of the leisure day market. Holiday makers still represent a more significant market in the New Forest compared to the neighbouring proposed South Downs National Park where 26% of visitors were found to be on holiday, with only 4% of these visitors staying overnight in the proposed boundary area (TSE, 2003).

Figure 1: Visitor type - all survey locations



##### 4.1.3 Variation between peak, shoulder & off-peak period

Variations in the usage of the New Forest at different times of the year by different types of visitors were found.

Staying visitors accounted for 50% of all visitor groups surveyed during the peak summer period, 45% of all visitor groups surveyed during the 'shoulder' period and 20% of all visitor groups surveyed during the off-peak winter months.

Day visitors were generally found to have less seasonal variation in the usage of the Forest. Local day visitors from home, accounted for 30% of all visitor groups surveyed in the peak summer months, increasing to 50% of all visitor groups surveyed during the off-peak period. Other day visitors from homes further afield accounted for 20% of all visitor groups during the peak summer months, 27% of all visitor groups during the 'shoulder period' and 31% of all groups surveyed during the off-peak months.

The spread of staying visitors and day visitors interviewed at individual sites over the summer and winter months are presented in Table 13. Significant differences are highlighted with some sites such as Dibden Inclosure being visited

predominately by local day visitors all year long, and others such as Ober Corner being predominately visited by holiday makers in the peak period. In market towns such as Brockenhurst and Sandy Balls the vast majority of leisure visitors encountered for interview were holidaymakers.

### 4.1.3 Age & gender

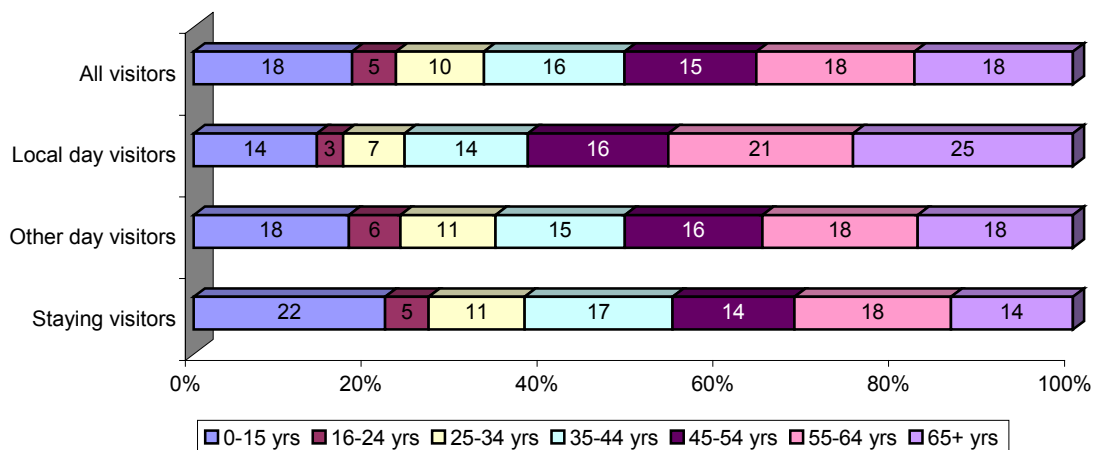
Females were more likely to be represented within visitor groups than males (53% and 47% respectively). This finding was consistent across all visitor types.

Adults (over 16 years of age) accounted for a relatively high proportion (82%) of all individuals represented within the visitor groups surveyed. Children under 16 years accounted for just 18% of all individuals represented within the survey, varying between 14% of individuals represented in local day visitor groups, 18% of individuals represented in other day visitor groups and 22% of individuals represented in staying visitor groups.

Overall, visitors were relatively evenly distributed between the age categories, but with a slight bias towards the older age categories. Relatively few visitors were encountered in the 16-24 and 25-34 age categories.

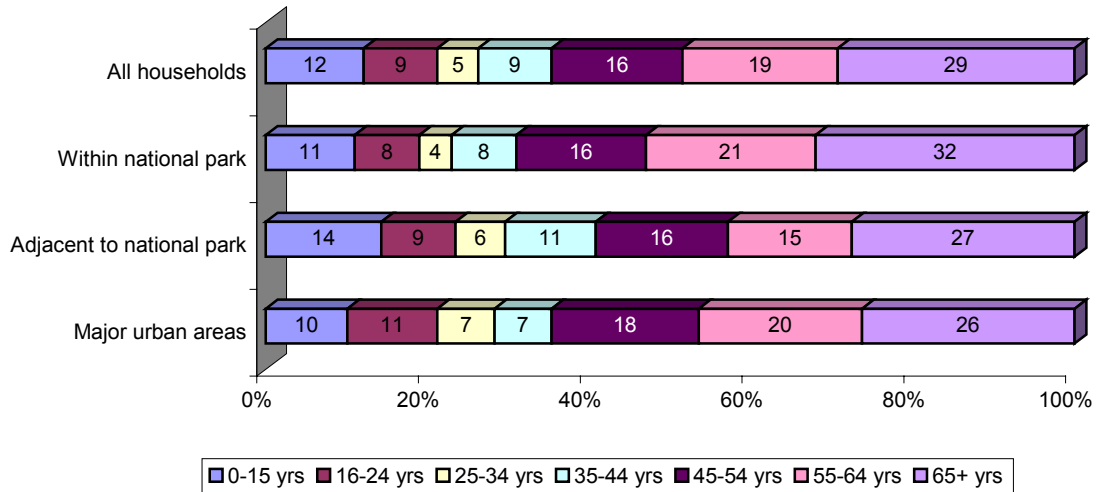
Age was not specifically reported on in 1994 APVS so there is no comparative data to compare with. Comparative data can be drawn from the proposed South Downs National Park visitor survey, which found a similarly mature group of visitors with 79% of all groups containing adults, of which 40% were over 55 years of age.

**Figure 2a: Age profile - all visitors represented within the onsite survey**



The slightly older age profile of local day visitors is consistent with the age profile of local visitors interviewed as part of the household survey.

**Figure 2b: Age profile - all visiting households represented within the household survey**



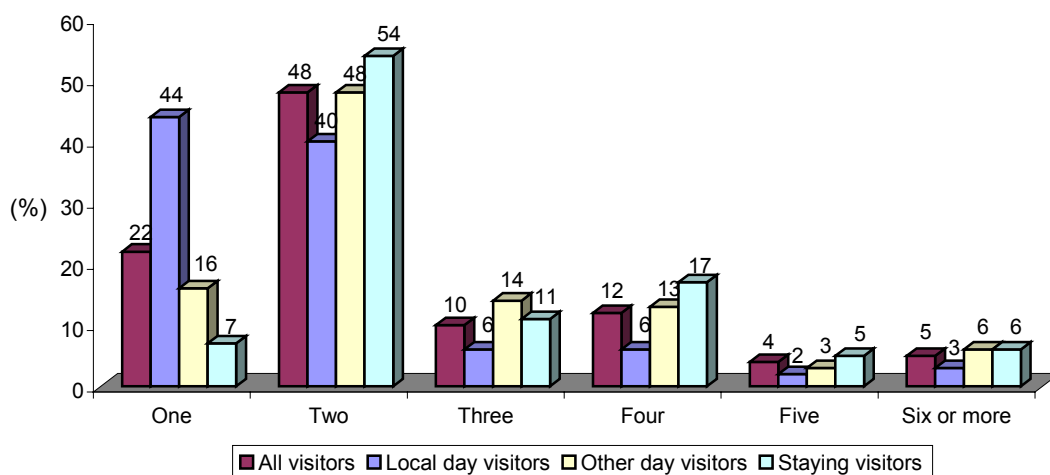
**4.1.3 Group size & composition**

The most frequently encountered group composition was two adults (46% of all visitor groups surveyed), remaining relatively unchanged since the 1994 APVS. 22% of all groups consisted of a lone adult, although this varied between 44% of all local day visitor groups and 7% of all staying visitor groups.

Smaller proportions of groups consisted of three adults (4%) or four or more adults (5%).

Groups including children were most likely to include two adults and one or more children (13%). 4% of all visitor groups consisted of a single adult with one or more children, while 6% of all groups consisted of three or more adults with one or more children.

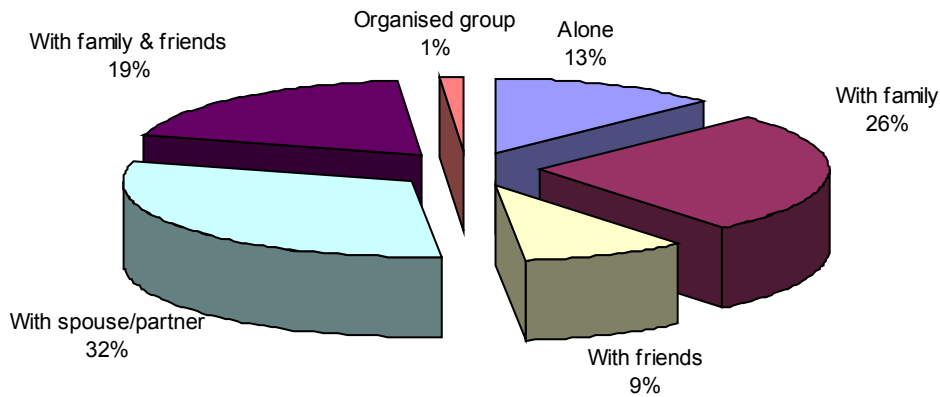
**Figure 3: Group size (persons) - all survey locations**



Groups encountered in the onsite survey ranged between 1 and 51 individuals, resulting in an average group size of 2.6 people. When larger groups of 10 or more people are excluded, the average group size was 2.4 people.

The household survey looked at who visitors travelled with, and did not specifically examine group size and composition.

**Figure 4: Person/group travelled with - all household visiting parties**



A third of households, which visited the New Forest, replied that they usually visited with a spouse or partner. Visiting the New Forest with family was the second most popular social group found.

#### **4.1.3 Socio-economic profile**

Based on the occupation of their household's highest income earner, 24% of all visitors interviewed at the survey sites fell into the affluent 'AB' socio-economic group (higher and intermediate managerial/ professional occupations) and 48% were 'C1's (all other white collar occupations).

19% of all visitors surveyed fell into the skilled manual worker category (C2) and 10% fell into the lowest 'DE' group (semi-skilled and unskilled manual occupations plus long-term unemployed).

The proportion of 'ABC1' visitor groups was similar across all visitor types (average 72%). Local day visitor groups included a relatively high proportion of 'AB's (27%) while staying visitor groups included lower proportions of 'AB's (20%) and higher proportions of 'C1's (52%).

The household survey revealed a slightly more affluent profile of local visitors. 34% of visiting households fell into the 'AB' socio-economic group. Only 6% of visiting households fell into the lower 'DE' socio-economic group.

The findings from this survey are consistent with previous surveys in the New Forest and countryside recreational user surveys from other National Parks and countryside areas around the UK (Section 2.2.1).

#### **4.1.3 Disability**

Overall, 8% of visitor groups represented in the onsite survey included one or more person(s) with a disability. This proportion was similar across all visitor types.

Groups were most likely to include visitors with a physical disability. Relatively few visitor groups including persons with a learning disability or a sensory impairment were encountered during the survey period.

13% of local households interviewed for the household survey included a person who was registered disabled. Members of households including person(s) with a disability were less likely to have visited the New Forest than those in households without a disabled person (78% and 88% respectively had visited the New Forest for recreational purposes within the previous 12 months).

## 4.2 Origin of visitors

### 4.2.3 Day visitors from home

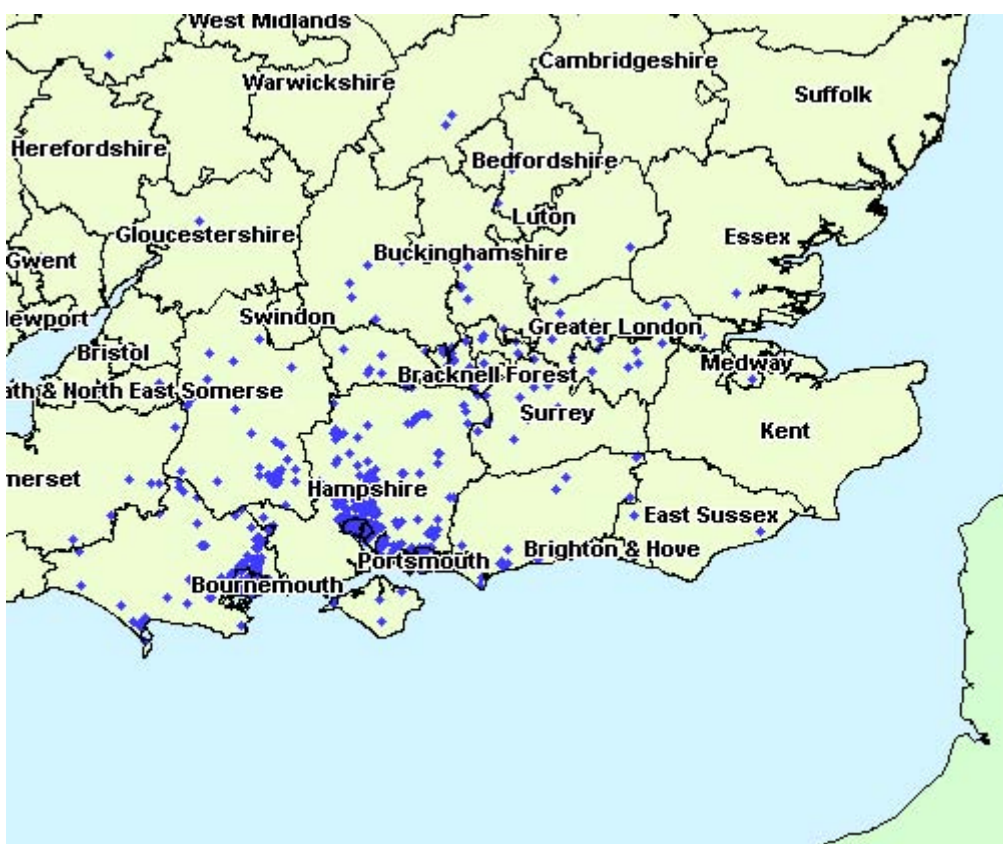
Excluding residents of the New Forest, the majority of people on day trips came from areas within easy reach of the New Forest.

52% of day visitors came from home locations elsewhere in Hampshire, including 28% who were residents of Southampton, Eastleigh and Chandlers Ford.

29% of day visitors came from home locations in Dorset, around half of whom were residents of Poole and Bournemouth.

7% of day visitors came from home locations in Wiltshire.

**Figure 5: Origin of day visitors from home (excluding 'local' day visitors)**



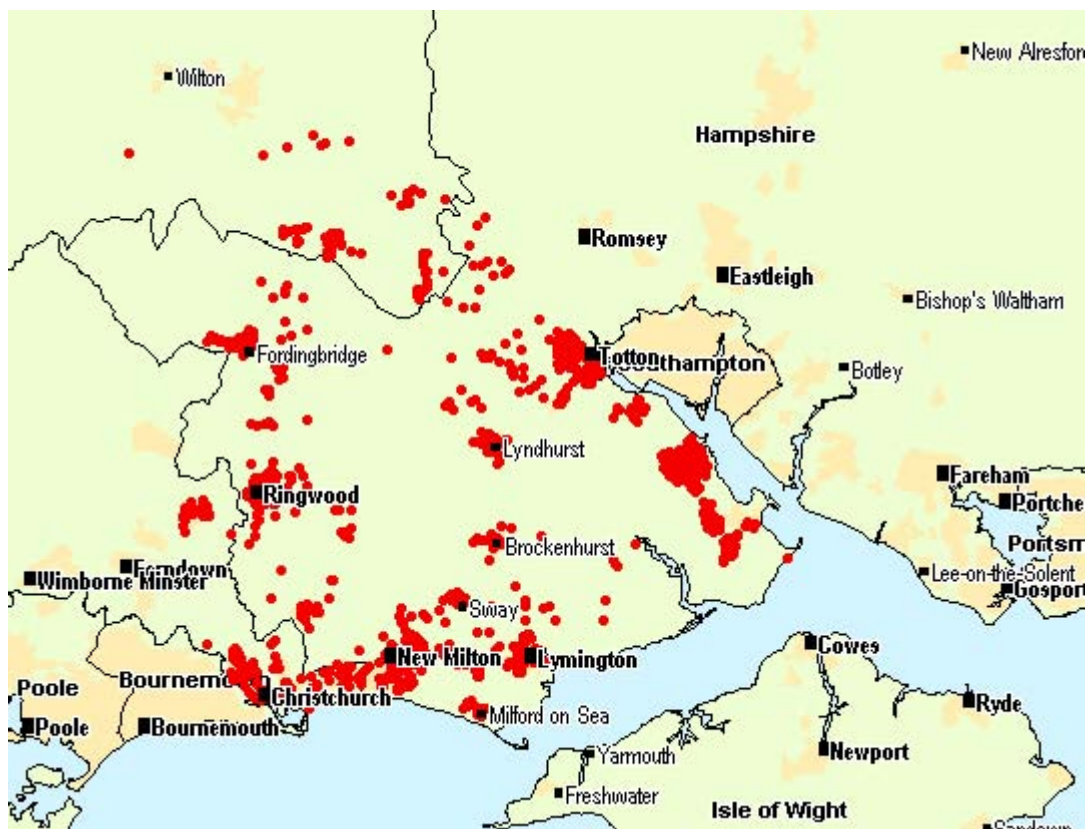
Smaller proportions of day visitors had travelled from home locations further afield, including Berkshire, Surrey, West Sussex and Greater London.

The 1994 APVS found that only 19% of day visitors originated from outside Hampshire compared to 36% in the recent survey. However, the results of the recent survey are not directly comparable to the 1994 APVS as the boundary of the New Forest has changed with the designation to national park status.

### 4.2.2 Day visitors from home

As shown in Figure 5, below, the home locations of 'local' day visitors were concentrated around the residential areas within the New Forest.

Figure 6: Home location of 'local' day visitors from home



30% of local day visitors came from homes in the Totton & waterside areas bordering the Forest to the east. 20% came from the south coast towns around Lymington, Milford, New Milton, Hordle and Sway. 12% came from homes in or around Ringwood, Poulner, Burley and Brangore to the west of the Forest.

Other local visitors came from smaller villages or population centres around and within the New Forest.

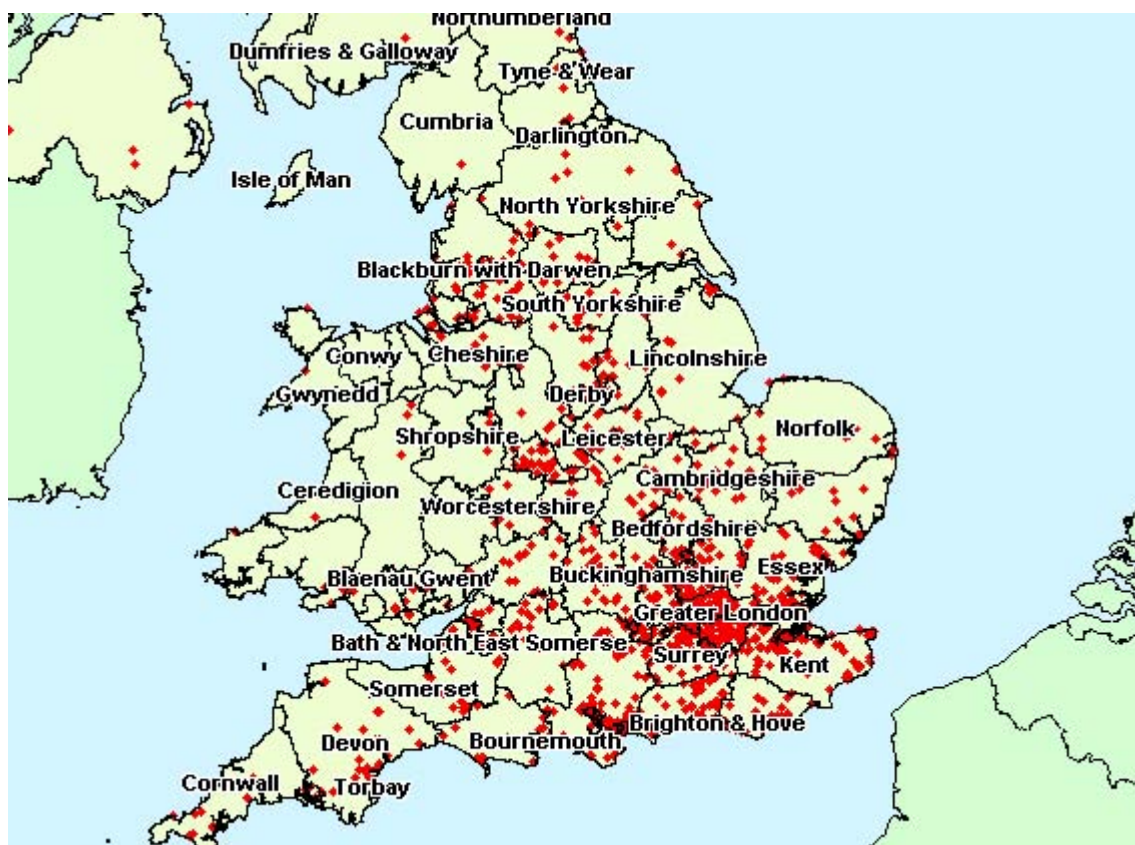
#### 4.2.3 Domestic holiday (staying) visitors

People visiting the New Forest on holiday trips (staying in the New Forest or elsewhere) came from a wide range of locations around the UK.

The highest proportion of domestic staying visitors came from Kent (9%), Hampshire (7%), West Sussex (6%), Surrey (6%) and Greater London (6%). Smaller proportions of holiday visitors came from Essex (5%), East Sussex (4%) and Hertfordshire (3%).

The findings are comparable to the 1994 APVS.

Figure 7: Origin of domestic holiday (staying) visitors



#### 4.2.3 Overseas visitors

Overseas visitors accounted for 2.4% of all visitor groups surveyed in the onsite survey overall, and 6% of all staying visitors. This is comparable to the 1994 APVS.

The countries most frequently represented among visitor groups surveyed include France, Australia, the USA, Germany and the Netherlands.

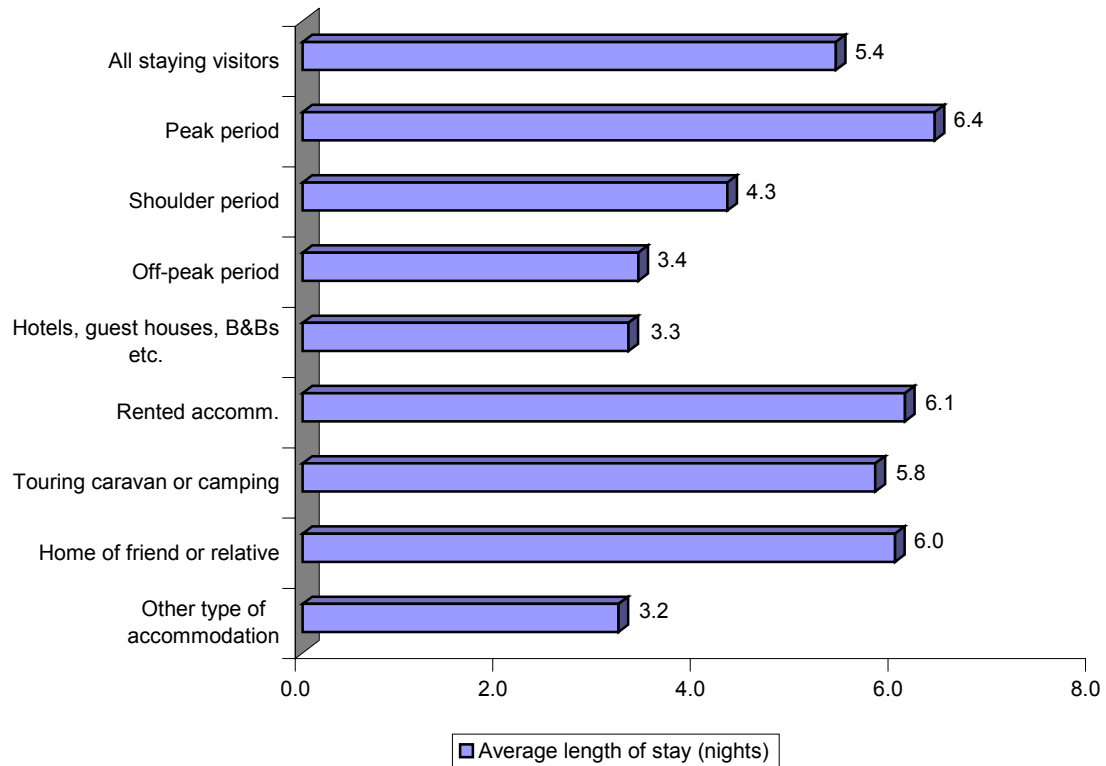
### 4.3 Holiday/ staying visitors

#### 4.3.1 Length of stay

Visitors staying overnight in the New Forest on leisure or holiday trips stayed for an average of 5.4 nights. This compares to an average length of stay of 7.8 nights reported by the 1994 APVS. The decline in the length of holidays is consistent with a wider national trend towards shorter holidays. Results from the 2003 UKTS indicate that the national average length of a holiday trip in the UK by domestic holidaymakers is 3.1 nights.

The average length of stay by type of accommodation used is shown in Figure 8, below.

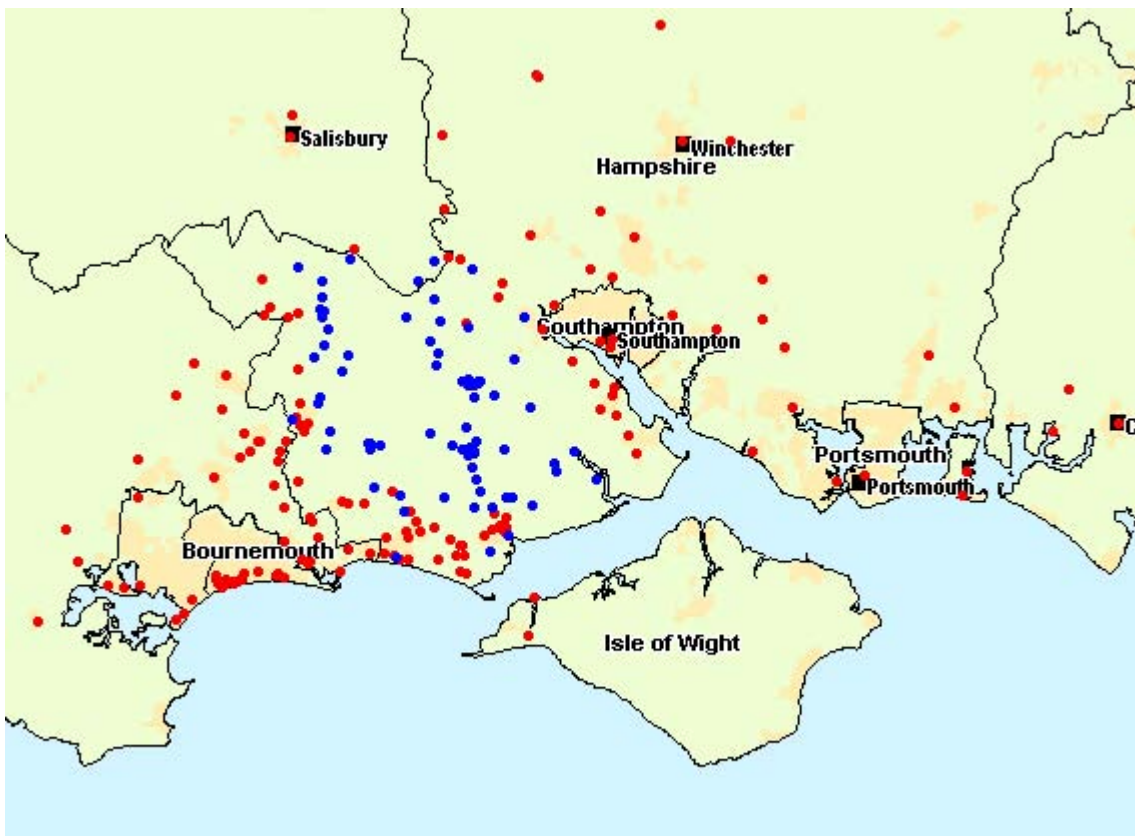
**Figure 8: Average length of stay (nights) - all visitor groups staying in the New Forest by survey period & type of accommodation used**



**4.3.2 Where visitors stayed**

52% of all holiday visitors were staying overnight for one or more nights in commercial or non-commercial accommodation within the New Forest National Park area. The remaining 48% were visiting the New Forest for the day while staying away from home in accommodation bases elsewhere.

**Figure 9: Location of accommodation – visitors staying overnight within the National Park area**



### 4.3.3 Type of accommodation used by staying visitors

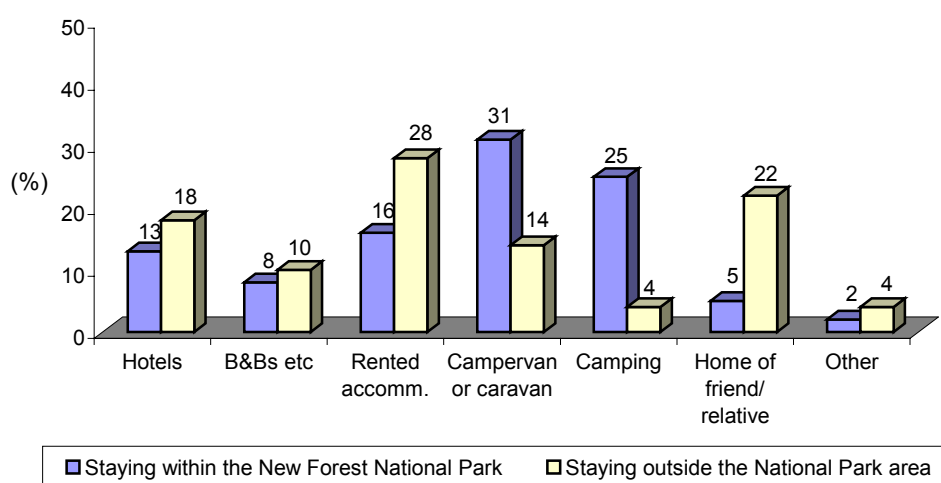
Of the visitor groups staying overnight within the New Forest National Park area, 21% were staying in serviced accommodation including hotels (13%), B&Bs (6%) guest houses, pubs or inns (1%).

The highest proportion of holiday visitors (72%) were staying in various types of self-catering accommodation including, touring caravans, tents or campervans including rented houses, cottages or flats, static caravans, chalets or log cabins.

5% were staying in the homes of friends or relatives during their visit to the New Forest.

This proportion is similar to the findings of the 1994 All Parks Visitor Survey.

**Figure 10: Type of accommodation used - all staying visitors**



Holiday visitors staying in accommodation *outside* the New Forest were also likely to be using self-catering accommodation (46%), followed by serviced accommodation (28%), and staying in the home of friends or relatives (22%).

### 4.3.4 Type of transport used to travel to the accommodation base

96% of holiday visitors staying within the National Park used a car or private vehicle as the main mode of transport to their accommodation base, 2% used public transport (trains or buses) and 2% used other modes of transport including boats, ferries etc.

The majority of those staying outside the New Forest area also used cars or private vehicles (92%), with 4% using public transport services and 2% arriving as part of a coach tour.

## 4.4 Visit characteristics

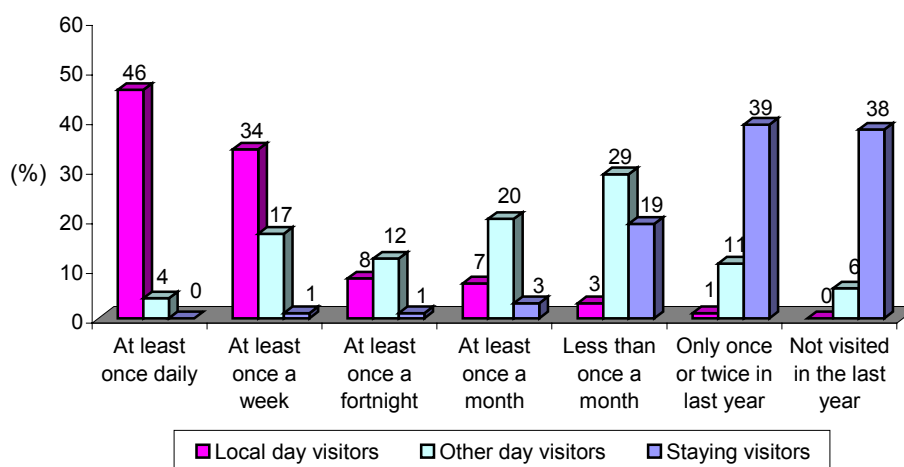
### 4.4.1 Previous visits to the New Forest & frequency – by visitor type

Visitors were asked how many times they had visited the New Forest within the last 12 months. Responses ranged from 0 to 1095 times, reflecting both rare or occasional visits and those who visit the Forest up to three times a day all year round. Overall, local day visitors are the largest frequent users of the New Forest, supporting the findings of earlier studies (Portsmouth, 1996).

Local day visitors from home had made an average of 257 recreational visits to the New Forest during the previous 12 months. 46% indicated that they visit at least once daily all year round, 34% visit at least once a week and 8% visit at least once a fortnight. The household survey found a smaller percentage of households located within the New Forest reporting to visit the New Forest ever day (33%). This difference may be due to the generally older age profile of households located within the New Forest, which agreed to participate in the survey. Notwithstanding, the household survey provides further evidence that the number and frequency of local visits to the New Forest tends to be relatively consistent throughout the year (see Tables 63a-63c in section 5.2.3).

The onsite survey found that other day visitors from home had made an average of 45 recreational visits to the New Forest in the last year. A small proportion of these indicated that they visit the Forest daily (4%), 17% indicated that they visit at least once a week and a further 32% visit at least once a month. 6% had not visited at all within the last year and 11% had visited only once or twice in the last year. These results support results from the household survey, which found a similar pattern of usage among visiting households residing within the major urban catchment areas (see Table 62).

**Figure 11: Recreational visits to the New Forest in the last 12 months**



Visitors staying overnight in the New Forest at the time they were interviewed had made an average of 3 visits to the New Forest in the last year. A small proportion of these had visited at least once a month on average (5%), but the majority had either not visited in the last year (38%) or had only visited once or twice during this time (39%).

A similar pattern of visitation was evident for those visiting the Forest while on holiday elsewhere.

The 1994 APVS revealed a high incidence of repeat visits; however, it is not possible to directly compare the results with the recent survey as the time span used to record previous visits differed. The 1994 APVS used a time span of 'last 5 years' to 'more than 10 years ago' to record previous visits. For the purpose of the recent survey, it was felt that this time span was too wide.

#### 4.4.2 Mode of transport used (to that site)

As in previous surveys, the majority of visitor groups (85%) had travelled to the New Forest in their own private vehicles. 12% had walked or cycled from home or from their accommodation base to the site visited on the day they were interviewed. Use of public transport services (buses, trains etc.) was low (2%). The results are comparable to the mode of transport found to be used by visitors travelling to the proposed South Downs National Park (TSE, 2003).

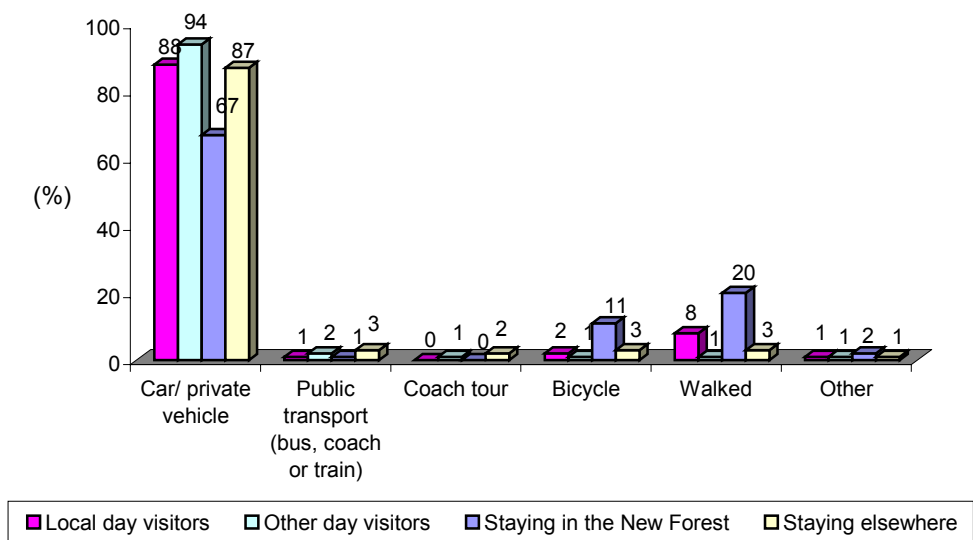
Results split by visitor type reveal that 87% of visitors staying outside the New Forest area and 94% of non-local day visitors from home used a car or private vehicle to travel to the site where they were interviewed. According to the 2002-3 GBDVS 86% of tourism day leisure visits to the countryside involved travelling to the destination by car.

Visitors staying overnight in the Forest were less likely to use their car to travel to the site visited (67%), with 20% walking and 11% cycling from their accommodation base. However, as reported on earlier in section 4.3.4, 92% had travelled to their accommodation base from home using their private motor vehicle.

Despite living within the New Forest, 88% of local day visitor groups used a car or other private motor vehicle to travel to the site where they were interviewed. Only 10% of local visitors had either walked or cycled to the survey location. The household survey results on this area differed, finding 64% of all visiting households within the New Forest usually used a car or other private motor vehicle to travel to chosen areas.

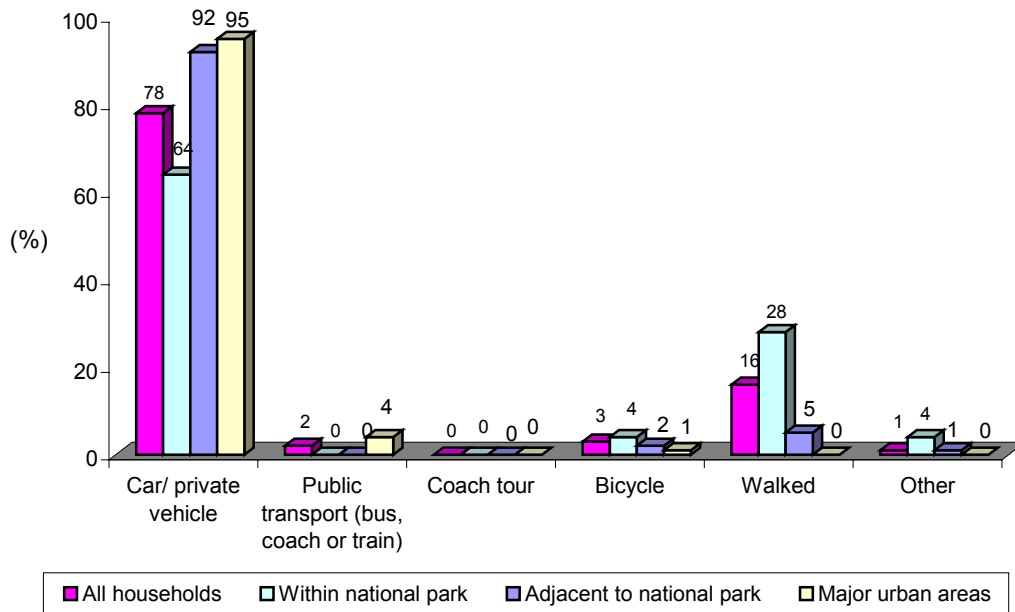
The results suggest a small decrease in car usage among visitors since the 1994 APVS, which reported that 97% of day visitors and 96% of holidaymakers<sup>1</sup> travelled to the New Forest in their own private vehicle.

Figure 12a: Mode of transport used to travel to the survey site



<sup>1</sup> It should be noted that the 1994 APVS did not differentiate between modes of transport used by staying visitors to their accommodation and to the actual site interviewed at.

**Figure 12b: Mode of transport used to travel to New Forest**



#### 4.4.3 Whether other transport mode considered, whether would use a Park & Ride

Car users were asked whether they had considered using any alternative mode of transport. Overall, 9% indicated that they *had* considered using other modes of transport, including 13% of local day visitors, 9% of visitors staying in the Forest, 6% of non-local day visitors from home and 5% of visitors staying away from home elsewhere.

Local day visitors were most likely to have considered walking or cycling. Other day visitors were most likely to have considered cycling or catching a train.

Visitors staying in the New Forest were most likely to have considered cycling, walking or catching a train, while visitors staying elsewhere were most likely to have considered cycling or catching a bus.

Not surprisingly, the reasons given for using a car rather than walking or cycling most frequently related to the weather. Lack of time and the practicality of transporting dogs were also significant factors. A number of visitors gave no specific reason for choosing to use a car over walking or cycling.

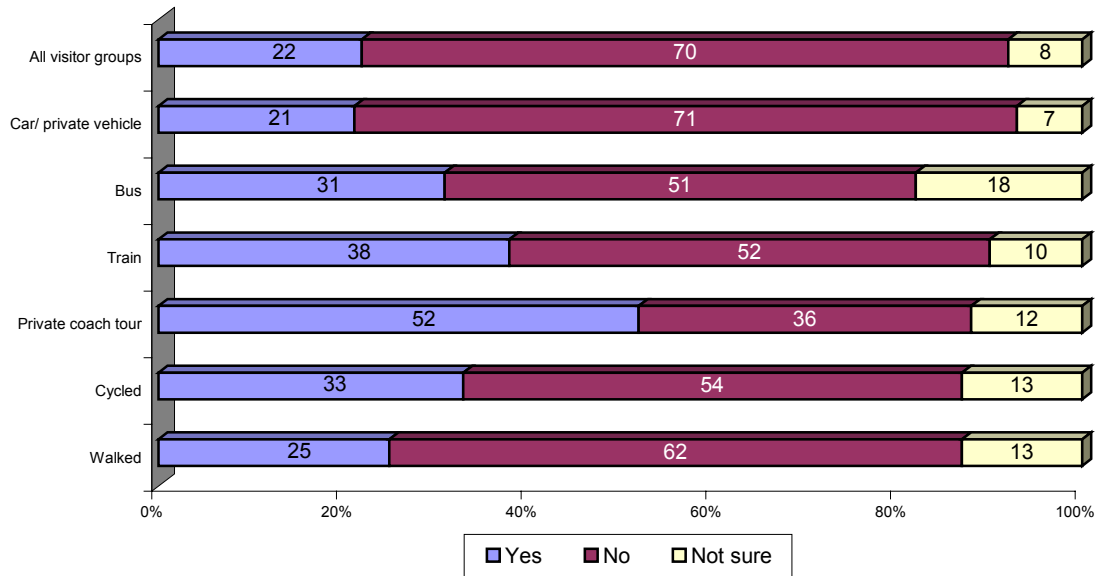
Those who considered using public transport instead of their car most frequently indicated that they were either going on to other places after visiting the survey site, or commented that buses and trains did not offer a service or a direct route to the site visited.

All visitors were asked whether they would consider using a Park & Ride service when visiting the New Forest. Overall, 22% of respondents would consider using such a facility.

Visitors staying in the New Forest and those staying on holiday elsewhere were most likely to consider using a Park & Ride service (36% and 32% respectively). Lower proportions of local day visitors and other day visitors indicated they would use a Park & Ride facility (11% and 20% respectively).

Those who had walked, cycled or travelled to the New Forest by public transport this visit were more likely to consider using a Park & Ride facility than those who had travelled by car or private vehicle.

**Figure 13: Whether would use a Park & Ride service - all visitor groups by type of transport used this visit**



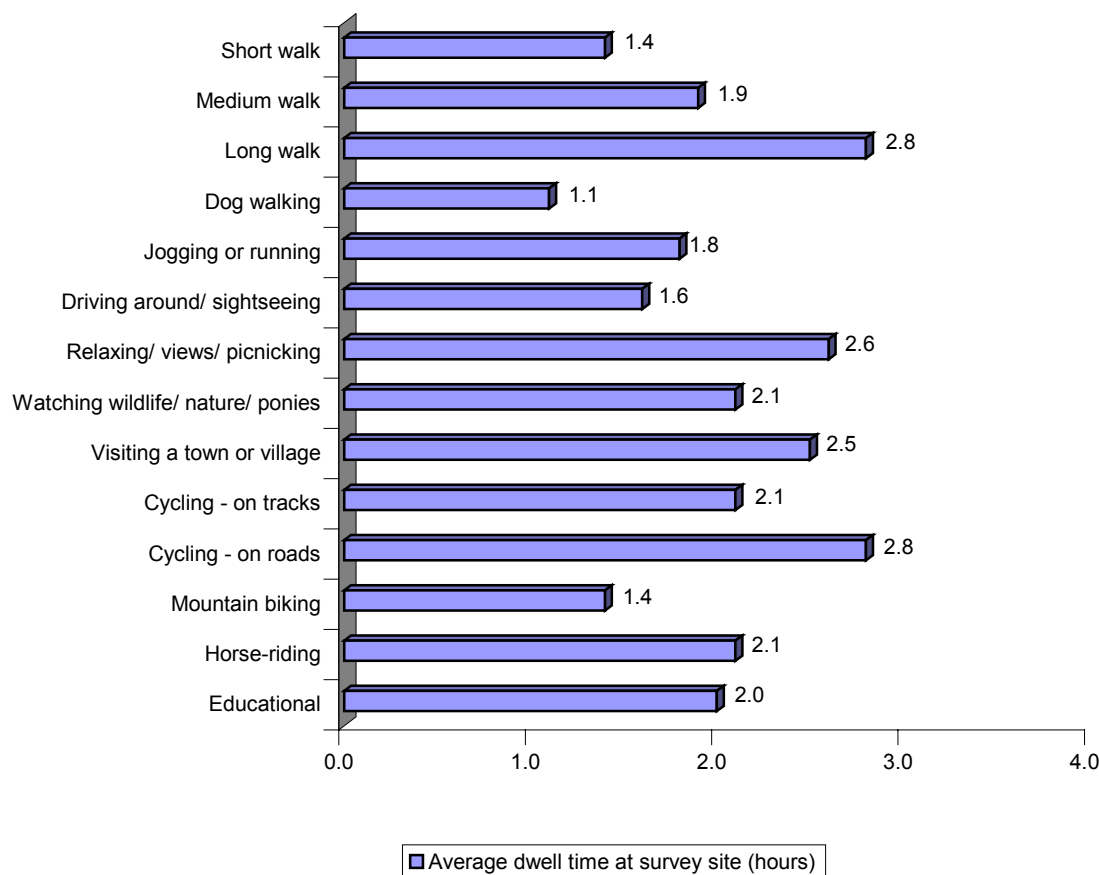
Those who were unlikely to use a Park & Ride facility were asked what factors would influence their decision.

The need to transport dogs and the need/ enjoyment of the freedom of using their own vehicle were most frequently mentioned as factors that would deter use of a Park & Ride service. Those living local to the Forest considered it unnecessary, and a number of visitors disliked the inconvenience they associated with using public transport. A full list of responses is provided in Table 35..

#### 4.4.4 Dwell time on site

Visitors spent an average of 1.9 hours at the site where they were interviewed. This varied between an average of 1.6 hours in the winter months and 2.0 hours in the summer months.

**Figure 14: Average dwell time at survey site - all visitor groups by main purpose of visit**



Visitors staying in the New Forest and those visiting for the day while staying away from home elsewhere spent an average of 2.2 hours at the survey site. The average dwell time for non-local day visitors from home was similar at 2.3 hours. Local day visitors tended to make shorter visits to the sites surveyed, spending an average of 1.3 hours at the site where they were interviewed. The shorter duration of visits by local residents can be linked to the primary purpose of trip. The survey found that a high number of local residents visited the park to walk the dog followed by short walks (see Table 36).

The 1994 APVS reported on the dwell time of non-local day visitors only and found that among this group of visitors, the average length of time spent in the New Forest was 3.8 hours. Interestingly, this is similar to the average time spent by tourism day visitors<sup>2</sup> reported by the 2002-3 GBDVS.

The difference in length of time spent reported by the different surveys does not conclusively indicate shortening in the time spent by visitors to the New Forest. The most recent survey to the New Forest asks visitors to report on what time they arrived at the location they were interviewed and what time they anticipate leaving to calculate average dwell time. The focus on the specific location the visitor was interviewed at was required to inform assessments of the scale of visitor flows to specific sites. Visitors may have visited or were planning to visit other sites in the New Forest but this would not have been factored in.

Figure 14 shows the average dwell time at the survey site by the main purpose of the visit to the New Forest that day.

<sup>2</sup> GBDVS differentiates tourism day visits from general leisure day visits. These are described as a subset of leisure day visits. They are defined as day visits, which involve over 3 hours duration and are taken on an irregular basis.

#### **4.4.5 Sources of information used to plan visits**

34% of all onsite visitor survey respondents indicated that they used maps or information sources to plan their visit to the New Forest. This varied between 61% of respondents staying overnight in the New Forest and 27% of non-local day visitors from home. Compared to the 1994 APVS there has been little change the use of information used to plan visits.

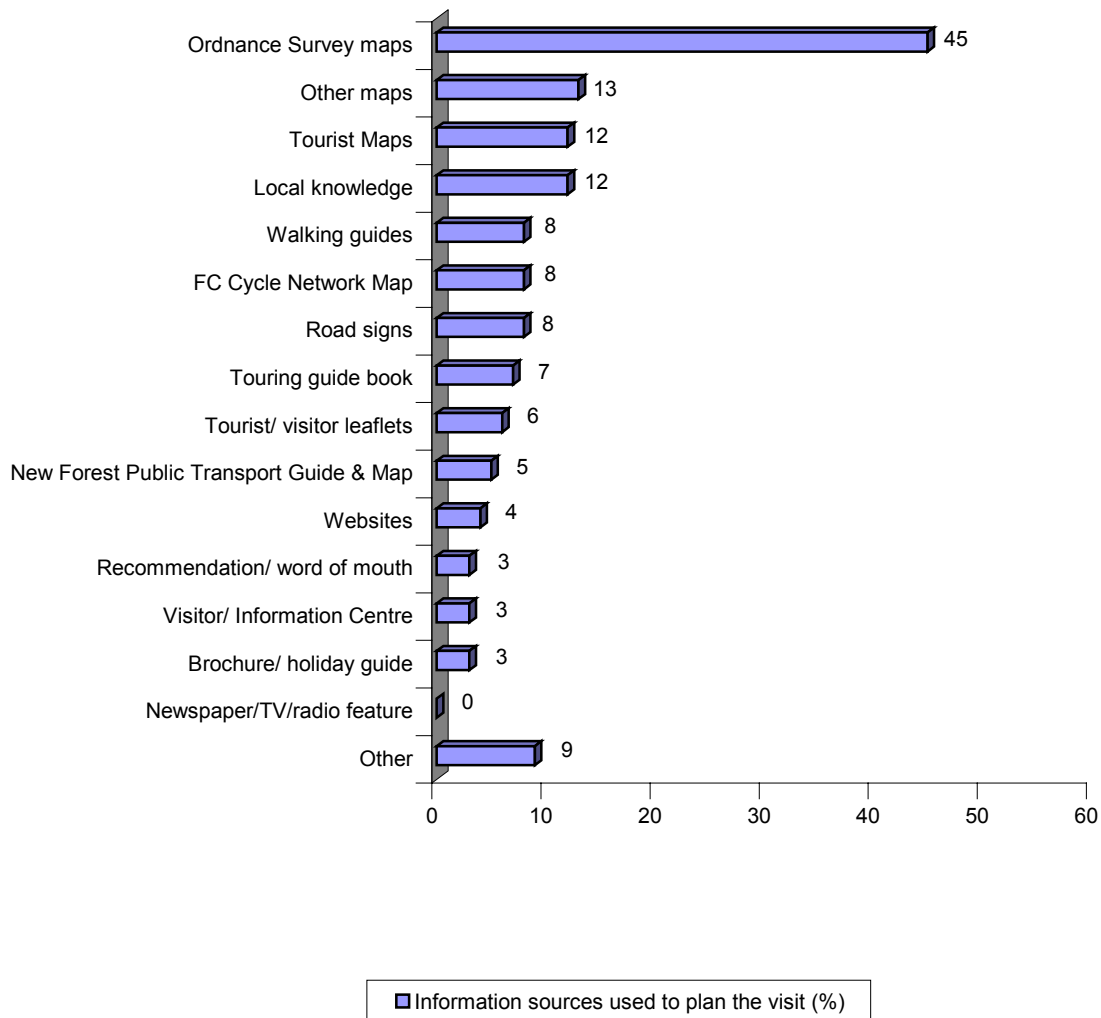
Of those who used information sources to plan their visit, Ordnance Survey maps, tourist maps and other maps were most frequently used to plan visits. Smaller proportions of visitors used walking guides, touring guide books, visitor leaflets or websites. Only 12% of local day visitors from home used printed information to plan their visit, relying on local knowledge instead.

The 12% of local day visitors who used maps or information sources were most likely to use Ordnance Survey maps (57%) or rely on local knowledge (31%). Day visitors from further afield were more likely to use maps or information sources (27%), around half using Ordnance Survey maps (53%) and 16% using other maps. A further 16% relied on local knowledge from previous visits.

Almost two thirds of visitors staying in the New Forest and half of those visiting the Forest while staying elsewhere used maps or information sources to plan their visit (61% and 51% respectively). Ordnance Survey maps, tourist maps and other maps were frequently used to plan visits, as well as Walking Guides (7%), touring guide books (8%) and tourist leaflets (8%). Staying visitors were also more likely to use the Public Transport Guide and Map (6%) or consult websites (5%) than day visitors.

Information sources used by visitor type are shown in Table 41 (p83) for visitors interviewed as part of the onsite survey. Details of brochures, leaflets, websites, maps and other information sources used to plan visits to the New Forest are provided in Tables 42a to 42d.

**Figure 15: Maps or information sources used to plan the visit to the New Forest - all visitor groups**



*Base: 1292 visitor groups who used maps or information sources to plan their visits. Multiple responses permitted.*

Interestingly the household survey suggests a significantly larger number of visiting households use information sources to plan their visit to the New Forest. 79% of households located within the national park area, 80% of households bordering the national park and 70% of households located in the major urban catchment reported to use information to plan their visit. The majority of visiting households mentioned local knowledge and maps.

The difference could be due to the way 'local knowledge' was perceived by the respondent. Onsite interview respondents had the opportunity to see the printed version of the questionnaire and during the interview could have caught sight of the list of pre-coded responses to this question. The list included the response 'No information used'. Respondents may have chosen to use this instead of the response 'Local knowledge'.

Consistent with the onsite survey findings, local knowledge and maps are the main sources of information used (see Table 72).

The results from the recent onsite and household survey suggest that traditional forms of information continue to be significant in the planning of visits. Despite the pervasive nature of the information and communication superhighway, relatively few visitors used the internet for information.

#### **4.4.6 Main and secondary reasons for visiting**

As presented in Figure 15, the onsite survey found that walking the dog (24%), relaxing, enjoying views and picnicking (13%) and short walks (less than 1 hour) were most frequently mentioned as the main purpose of the visit. Walks of 1-2 hours (11%), longer walks of 2 or more hours (7%), visiting towns or villages (7%) and recreational cycling off-road on tracks (5%) were also frequently mentioned. The responses provided are relatively similar to those found in other visitor surveys of national parks. The most popular main reason for visiting the South Downs was to go for a walk (25%). Walking was closely followed by a visit to a tourist attraction or place of interest (24%) and relaxing/ enjoying the view (19%).

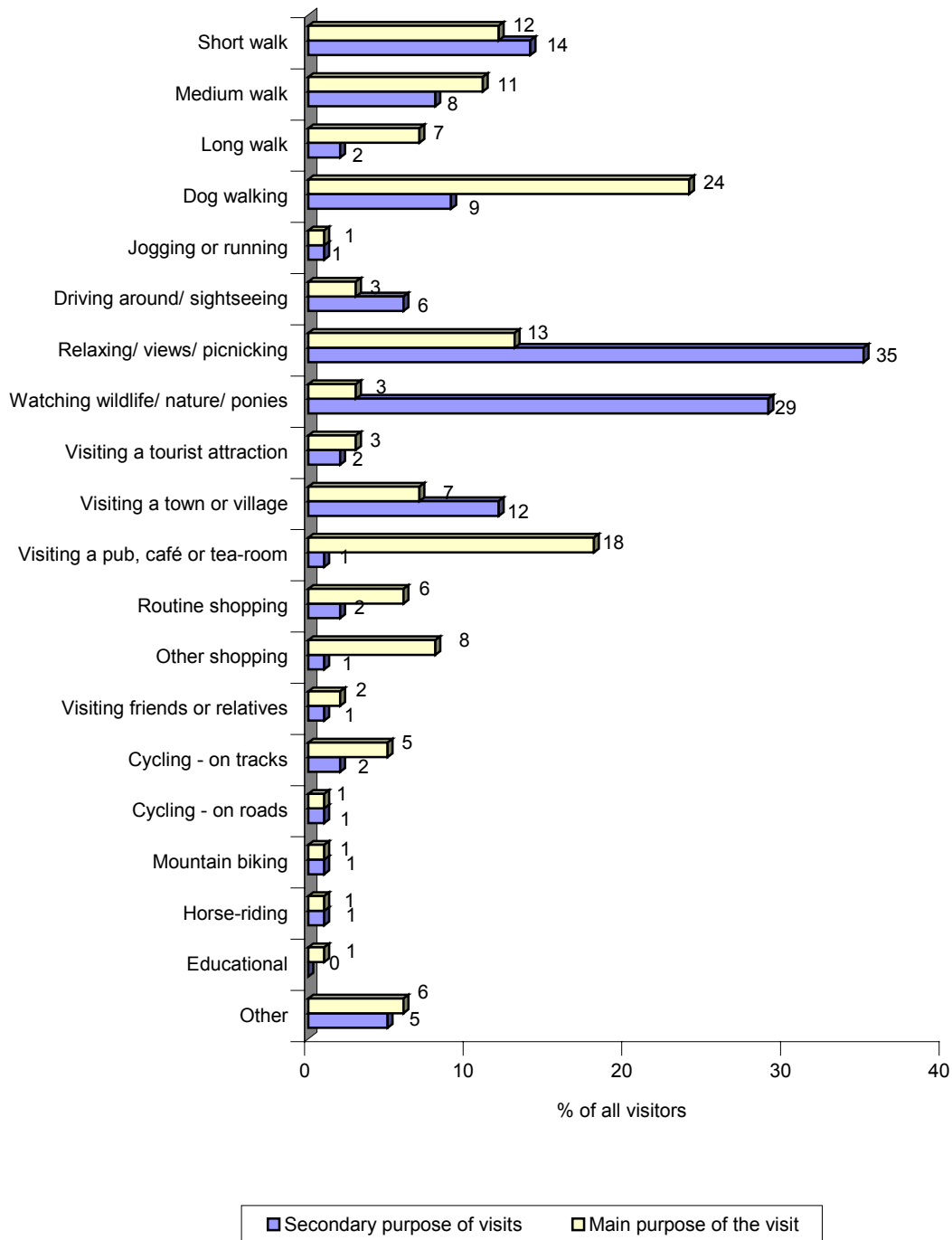
The onsite survey found that a slightly higher proportion of visitors mentioned short walks (less than 1 hour) and walks of 1 –2 hours as main reasons for visiting in the off-peak winter period. Dog walking was found to be a common main reason for visiting throughout the year, with an increase in dog walking as a main reason for visiting in the off-peak period. Seasonal variations in the purpose of visits and activities undertaken are shown in Tables 38 & 39.

Results split by visitor type reveal that a third of visitors staying on holiday in the New Forest gave their main purpose of visit to the survey site as going for a walk (32%), while 17% were mainly visiting for relaxation, enjoying views or picnicking. 11% were primarily visiting a town or village and 9% were visiting for recreational off-road cycling on tracks. The four most popular secondary reasons for visiting among this group of visitors are relaxing/enjoying views/picnicking (33%), watching wildlife/nature (26%), visiting a pub/café/tea room (24%) and visiting a town or village (20%). The main and secondary reasons for visiting by visitor type are shown in Tables 36 & 37.

For non-local day visitors from home, walking the dog (17%), relaxing/enjoying views/picnicking (15%), followed by short walks (less than 1 hour) and walks of one to two hours duration (14% respectively) were the four most popular reasons reported. The four most popular secondary reasons for visiting among this group are relaxing/enjoying views/picnicking (36%), watching wildlife/nature (30%), visiting a pub/café/tea room (20%), and visiting a town or village (12%).

For local visitors from home walking the dog was a particularly significant purpose of visit – 49% gave this as the main purpose of the visit, and a further 9% mentioned this as a secondary reason for visiting. A third of local day visitors indicated that walks (short, moderate or long) were the main reason for their visit that day (29%). The household survey found a relatively higher incidence of walking and dog walking as the main reasons for visiting, with around 81% of households mentioning visiting a pub/café/tea room as a secondary reason for visiting. Primary and secondary reasons for leisure visits to the New Forest by local residents and urban catchment area households are summarised in Table 67.

**Figure 16: Primary & secondary purpose of visits to the New Forest - all visitor groups**



*Base: 3838 visitor groups (onsite survey). Main purpose – single response only, secondary purpose – multiple responses permitted.*  
 Results from the 1994 APVS are not strictly comparable as the survey question was split between ‘All reasons’ and ‘Only or most important reason’. Among the latter reasons, the four most popular responses were scenery/landscape (18%), with 16% of visitors reporting that the most important reason for visiting is ‘because it is the New Forest’. The third most popular reason was because they had enjoyed a previous visit. The desire to visit a specific place/attraction/event was the fourth most important reason for visiting (11%).

Furthermore, the 1994 APVS distinguished between most important reason for visiting and activities undertaken. The results found that the four top activities undertaken by visitors were 'general sighting'; 62% of visitors were driving around and sightseeing and 36% did some sightseeing on foot. 40% mentioned a short walk and 32% mentioned 'picnicking'. As the response to the two areas are often the same, e.g. walking is the most important reason for visiting and walking is the main activity undertaken, it was felt for the purpose of this survey that activities could be captured in the question on the main purpose of visit.

#### **4.4.7 Use of local facilities**

Visitors were asked about use of specific facilities and services during their visits to the Forest. Car parks (83%), toilets (31%) and local shops (31%) were the facilities most frequently used by visitors. 16% used local pubs or inns and 15% used local cafes or tea-rooms during their visits.

Waymarked footpaths were used by 34% of all visitors, while smaller proportions used waymarked cycle paths (11%) or bridleways (9%). 10% used information boards and 6% used picnic sites.

Relatively few visitors (2%) were using any form of public transport of the day of their visit.

Car parks were least likely to be used by visitors staying on holiday in the New Forest (69%), but were used by high proportions of local day visitors (87%) and other day visitors (89%).

Public toilets, information boards, picnic sites, pubs/inns and cafes/ tea-rooms tended to be well-used by staying visitors and non-local day visitors, but by relatively few local day visitors. Staying visitors were also more likely to use local shops, Visitor Information Centres and visitor attractions than other visitor types (refer to Table 43).

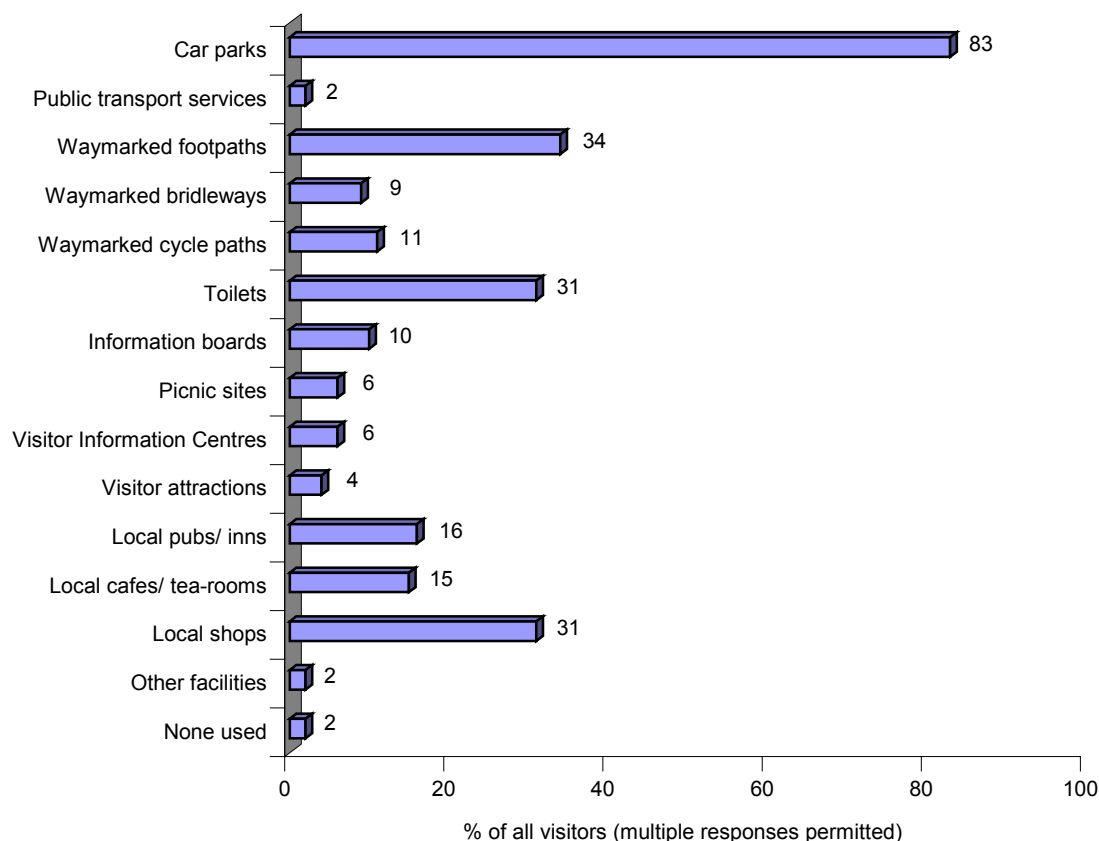
Waymarked footpaths were used by all visitor types, particularly local day visitors from home. Waymarked cycle paths and bridleways were used by smaller proportions of visitors, but particularly local and non-local day visitors and those on holiday in the New Forest.

The household survey found that car parks, local pubs/inns, other routes or open forest areas and waymarked footpaths are among the facilities/services most widely used by visiting households. The service most under-used the public transport service, with only 10% of visiting households using the bus or train.

Facilities and services used during leisure visits to the New Forest by local residents and urban catchment area households are summarised in Table 77.

Comparative data from the 1994 APVS was not available to us at the time of writing this draft report.

**Figure 17: Use of specific facilities & services during leisure visits to the New Forest - all visitors surveyed**



#### **4.5 Visitor enjoyment of the New Forest**

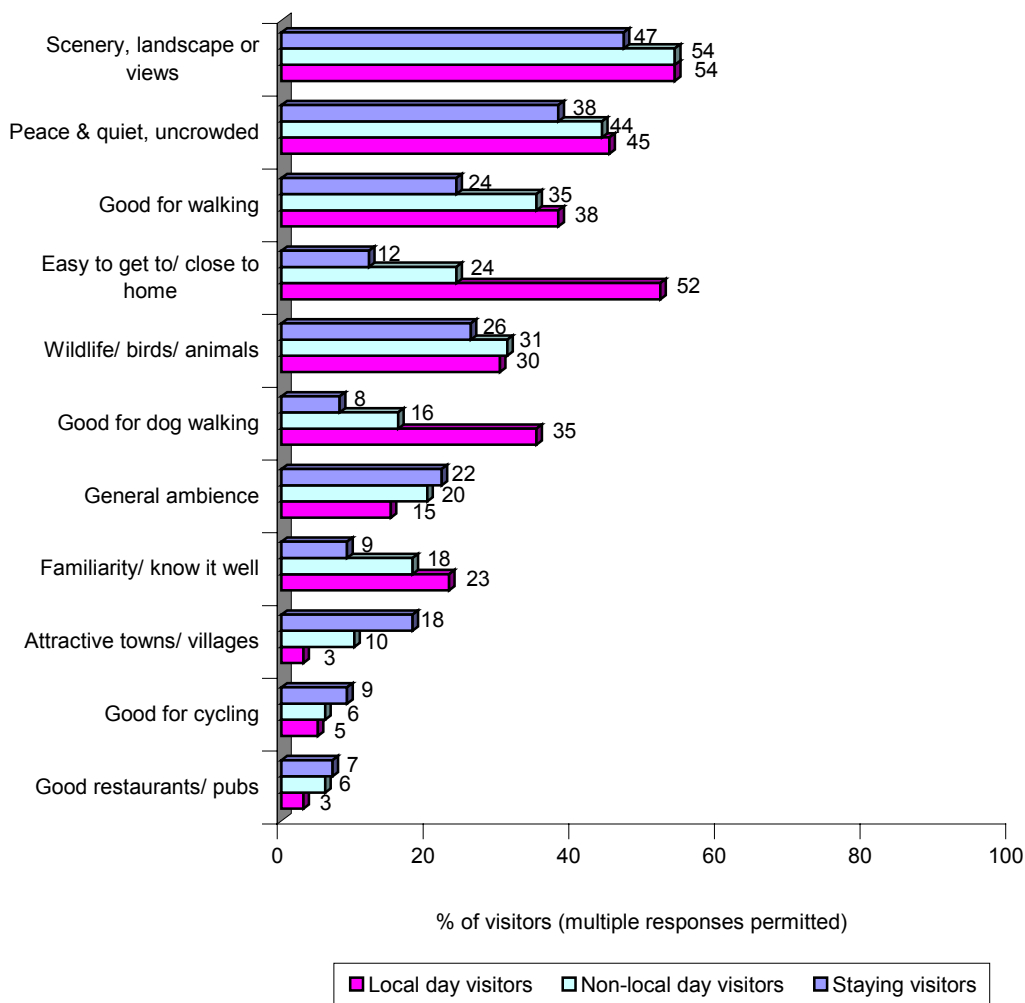
##### **4.5.1 Aspects visitors particularly liked**

Visitors were asked what they particularly liked about the location visited on the day they were interviewed. The findings suggest that the aspects which visitors interviewed for the 1994 APVS enjoyed are similar to the aspects which visitors enjoy now. The 1994 APVS found that 'scenery/landscape', 'fresh, clean air', 'peace & quiet' and 'wildlife' were the aspects, which contributed to their enjoyment the most.

In the recent onsite survey, the scenery, landscape and views were most frequently mentioned, followed by peace & quiet/ not too crowded, good for walking, wildlife, birds and animals. Local day visitors particularly valued the ease of access from home and good locations for dog walking.

A wide and varied range of responses was obtained. A full list of responses is provided in Table 44.

**Figure 18: What visitors particularly liked about that location - all visitors surveyed - by visitor type**



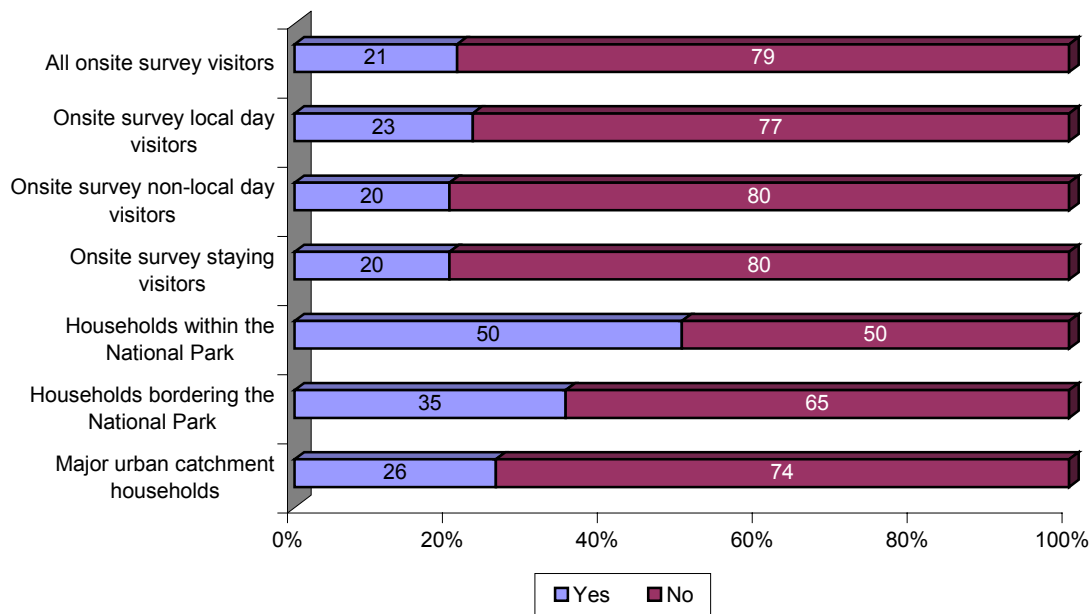
Residents of local and catchment area households interviewed for the household survey mentioned similar aspects. A full listing of particular likes about locations visited is provided in Table 78.

#### 4.5.2 Aspects spoiling the visit

Visitors interviewed at onsite survey locations were asked whether anything had spoiled the enjoyment of their visit that day. Satisfaction levels were generally very high with 79% reporting that nothing had spoiled the enjoyment of their visit. The 1994 APVS found a similarly high level of general satisfaction with 74% of visitors reporting that nothing had spoilt the enjoyment of their visit.

Aspects detracting from visitors' enjoyment were most likely to include bad weather (4% of all visitors), litter (3%), traffic congestion (2%) and dog mess (2%). Other issues included insufficient signposting/ waymarks (1% of all visitors), noise pollution (1%), lack of car parking (1%), pot holes and bad access roads into car parks (1%), overcrowding (1%) and dogs (1%). A wide variety of other issues and comments were mentioned. These are listed in full in Table 45.

**Figure 19: Whether anything spoils the enjoyment of visits to the New Forest - onsite visitor survey and household survey results**



In marked contrast to the onsite survey, residents of local and urban catchment area households surveyed as part of the household survey were more likely to mention aspects spoiling the enjoyment of their most recent visits to the New Forest.

Traffic congestion (11% of households surveyed), litter (8%), overcrowding (7%) and bad weather (5%) were most frequently mentioned. People driving too fast endangering the animals (3%), dog mess (3%) and lack of car parking (2%) were also issues of concern.

Again, a wide variety of issues were mentioned. These are listed in more detail in Table 80.

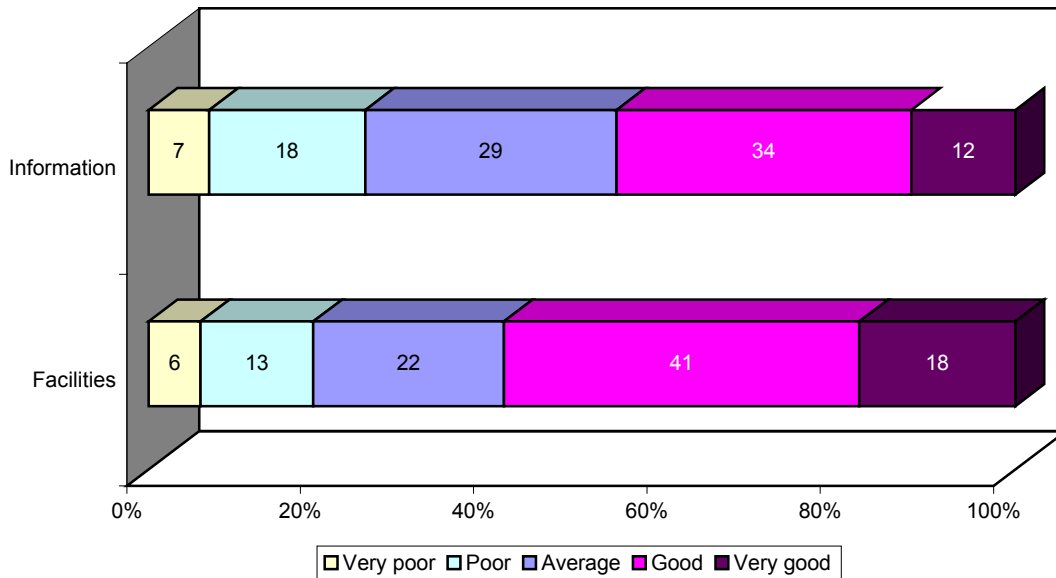
#### **4.5.3 Opinions on provision for disabled visitors**

Groups including disabled visitors encountered during the onsite survey were invited to comment on the provision of information and facilities for disabled visitors at the site where they were interviewed.

Of those who felt able to comment, around half (46%) felt that the provision of information for disabled visitors at that site was 'good' or 'very good'. 29% described this as 'average' and 25% as 'poor' or 'very poor'.

The provision of facilities for disabled visitors was rated more highly. 59% considered this to be 'good' or 'very good', 22% 'average' and 19% 'poor' or 'very poor'.

**Figure 20a: Disabled visitor opinions on the provision of facilities and information at that survey site**



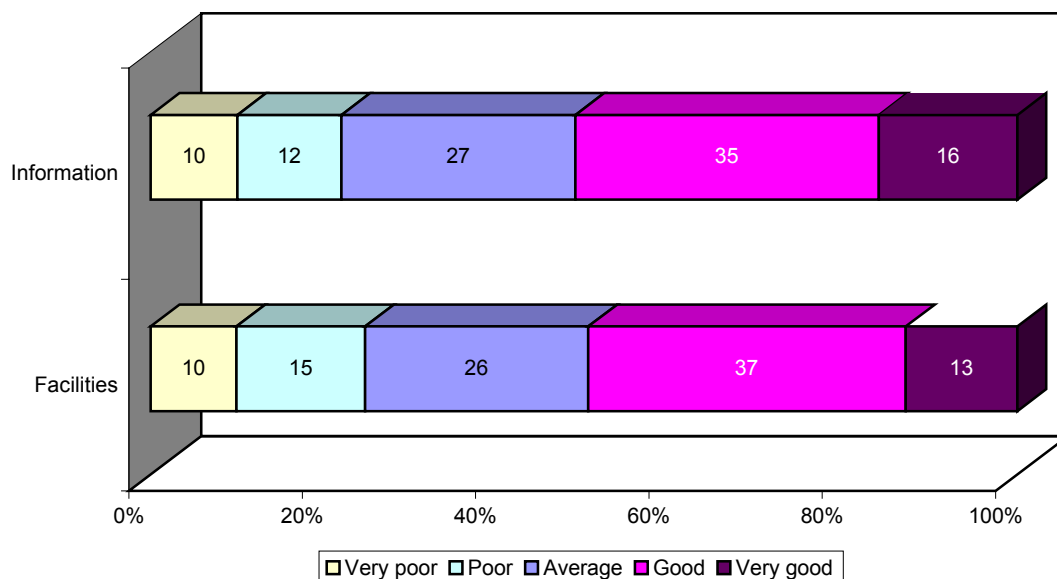
Disabled visitors were also asked whether the provision of information or facilities had influenced the choice of site visited. Overall 19% indicated that these aspects *had* influenced their choice of where to visit, varying between 18% of those with a physical disability and 31% of those with a sensory impairment.

When asked what could be improved or provided for disabled visitors, responses most frequently related to better paths or pavements (gravel is hard work for wheelchair users), toilets and disabled access to shops. Disabled visitors also expressed a need for more information boards, filling in of the potholes in the car parks, more seating and more disabled parking spaces.

Households including disabled persons were asked similar questions as part of the household survey. Overall, the provision of information for disabled people was considered to be 'good' or 'very good' by 51% of respondents, 'average' by 27% and 'poor' or 'very poor' by 22% of respondents.

Responses for the provision of facilities followed a similar theme. 50% of respondents rated this as 'good' or 'very good', 26% as 'average' and 25% as 'poor' or 'very poor'.

**Figure 20b: Households including disabled persons - opinions on the provision of facilities and information for disabled visitors**



When asked what could be improved or provided for disabled visitors, 43% felt unable to comment or offer suggestions and a further 15% felt that nothing was needed, or provision is fine as it is.

Among those offering comments or suggestions, more disabled toilets, better quality paths, more wide disabled parking spaces and better access to local shops and public buildings were again most frequently mentioned. A full list of comments or suggestions are provided in Table 88.

## 4.6 Visitor expenditure

### 4.6.1 Spend by category & visitor type

Overall, 49% of visitor groups surveyed spent (or expected to spend) money on eating & drinking (in pubs, cafes or restaurants) during their visit to the Forest that day. 38% spent money on non-regular shopping (gifts etc.), 11% spent money on entertainment (attractions entry, tours etc) and 50% spent money on travel and transport (fuel, fares or parking paid for in the New Forest) on the day they were interviewed.

Table 7: Percentage of groups/households spending any money in the New Forest - by visitor type & category

	Eating & drinking	Non-routine shopping	Entertainm't	Travel & transport	Any category
Onsite visitor survey					
<b>Local day visitors from home</b>	24%	20%	7%	38%	53%
<b>Other day visitors from home</b>	47%	29%	9%	52%	73%
<b>Staying visitors (staying in the New Forest)</b>	73%	63%	18%	54%	91%
<b>Staying visitors (staying elsewhere)</b>	73%	52%	14%	67%	90%
All visitor groups surveyed	49%	38%	11%	50%	73%
Household survey					
<b>Visitors from households within the National Park</b>	47%	10%	6%	27%	61%
<b>Visitors from households bordering the Park</b>	50%	18%	6%	41%	72%
<b>Visitors from major urban catchment households</b>	65%	13%	7%	47%	80%
All household survey respondents	51%	13%	6%	35%	67%

NB: Spend figures for the household survey relate to recall of spend during the most recent leisure visit to the New Forest.

As might be expected, visitors staying overnight in the New Forest were more likely to spend money on the day they were interviewed than other visitor types (73% had spent some money during their visit). Local day visitors from home were least likely to spend any money during their visit that day.

Recall of the most recent visit to the New Forest among households interviewed for the household survey revealed that around two thirds had spent money in the New Forest during their visit. Again, visitors from households within or adjacent to the National Park boundary were less likely to spend money during their visit than those who had travelled from further afield.

Visitors of all types were more likely to spend money on eating and drinking or travel and transport expenses than on shopping or entertainment.

The 1994 APVS reported that 9 out of 10 (86%) visitors had spent some money during their visit. However, this included money spent outside the New Forest and excluded expenditure by local residents.

Table 8: Average spend (£ per person per day) - by visitor type

	<b>Eating &amp; drinking</b>	<b>Non-routine shopping</b>	<b>Entertainm't</b>	<b>Travel &amp; transport</b>	Total:
Onsite visitor survey					
<b>Local day visitors from home</b>	<b>£ 1.48</b>	<b>£ 1.56</b>	<b>£ 0.04</b>	<b>£ 0.67</b>	£ 3.75
<b>Other day visitors from home</b>	<b>£ 2.71</b>	<b>£ 1.72</b>	<b>£ 0.27</b>	<b>£ 1.21</b>	£ 5.91
<b>Staying visitors (staying in the New Forest)</b>	<b>£ 6.46</b>	<b>£ 4.32</b>	<b>£ 1.00</b>	<b>£ 1.47</b>	£ 13.25
<b>Staying visitors (staying elsewhere)</b>	<b>£ 5.41</b>	<b>£ 3.98</b>	<b>£ 0.50</b>	<b>£ 1.65</b>	£ 11.54
All visitor groups surveyed	£ 3.89	£ 2.80	£ 0.43	£ 1.22	£ 8.34
Household survey					
<b>Visitors from households within the National Park</b>	<b>£ 6.94</b>	<b>£ 0.91</b>	<b>£ 0.66</b>	<b>£ 0.64</b>	£ 9.15
<b>Visitors from households bordering the Park</b>	<b>£ 5.41</b>	<b>£ 1.38</b>	<b>£ 0.32</b>	<b>£ 0.76</b>	£ 7.87
<b>Visitors from major urban catchment households</b>	<b>£ 7.71</b>	<b>£ 0.84</b>	<b>£ 0.51</b>	<b>£ 1.09</b>	£ 10.15
All household survey respondents	£ 6.55	£ 1.06	£ 0.52	£ 0.76	£ 8.89

*NB: Expenditure figures for the household survey relate to recall of the most recent leisure visit to the New Forest. Figures include those who spent 'nothing', but exclude 'no replies'.*

Average spend (£ per person per day) on the above categories are shown by visitor type in Table 8. Average expenditure figures for each category include those who spent nothing.

#### **4.6.2 Staying visitor spend on accommodation within the New Forest**

As shown in Table 9, visitor expenditure on overnight accommodation within the New Forest varied considerably according to the type of accommodation used. It should be noted that average expenditure figures for serviced accommodation establishments (hotels, guest houses and B&Bs) seem relatively low.

Table 9: Average spend on accommodation (£ per person per night) – staying visitors (staying in the New Forest) – by type of accommodation used

	Base (groups )	Average spend per person per night	
<b>Hotels</b>	<b>192</b>	<b>£40.28</b>	
<b>Guest houses</b>	<b>15</b>	<b>£22.72</b>	
<b>B&amp;B, Pub or Inn</b>	<b>96</b>	<b>£22.33</b>	
<b>Self-catering houses, cottages or flats</b>	<b>169</b>	<b>£18.24</b>	
<b>Static caravans, chalets or log cabins</b>	<b>95</b>	<b>£10.53</b>	<b>* some possibly owned rather than rented</b>
<b>Home of friend or relative</b>	<b>197</b>	<b>£0.31</b>	
<b>Campervan/ touring caravan/ motorhome</b>	<b>299</b>	<b>£5.06</b>	<b>* prob. includes informal camping in car parks</b>
<b>Camping (tent)</b>	<b>198</b>	<b>£5.00</b>	<b>* prob. includes informal camping in car parks</b>
<b>Other accommodation (hostel etc)</b>	<b>31</b>	<b>£4.92</b>	

NB: Figures include those who spent 'nothing' and exclude 'no replies'.

A high proportion of visitors were based in touring caravans or tents in New Forest campsites. Given that some of these visitor groups spent nothing on accommodation, it is likely that this includes some informal camping in New Forest car parks. This is particularly likely over summer weekends, when most of the campsites are fully booked or full to capacity. The results suggest that expenditure levels have changed little over the past 10 years. The 1994 APVS found that on average a day visitor spent £5.10 and a holidaymaker staying in the New Forest spent £16.10, rising to £28.50 with the inclusion of accommodation costs on their visit.

The survey results are comparable with other recent studies. The proposed South Downs National Park visitor survey found that on average day visitors spent £8.29 on their visit; holidaymakers spent £11.28 per day, rising to £27.69 with the inclusion of accommodation costs.

According to the 2002-3 GBDVS the average spent per visit to the countryside is £8.60 for a general leisure day visit. The expenditure level is considerably higher however for a subset group of leisure day visitors defined as 'tourism day visitors'. These are described as leisure day visits involving more than 3 hours and are taken on an irregular basis. The average spent per visit to the countryside by a tourism day visitor is £20.70.

No specific data on the national average expenditure per person per visit on holidays in the countryside was available at the time of writing the report. Results published from the 2004 UKTS reveal that on average domestic holidaymakers taking a holiday in the UK spend £61 per day (with accommodation costs).

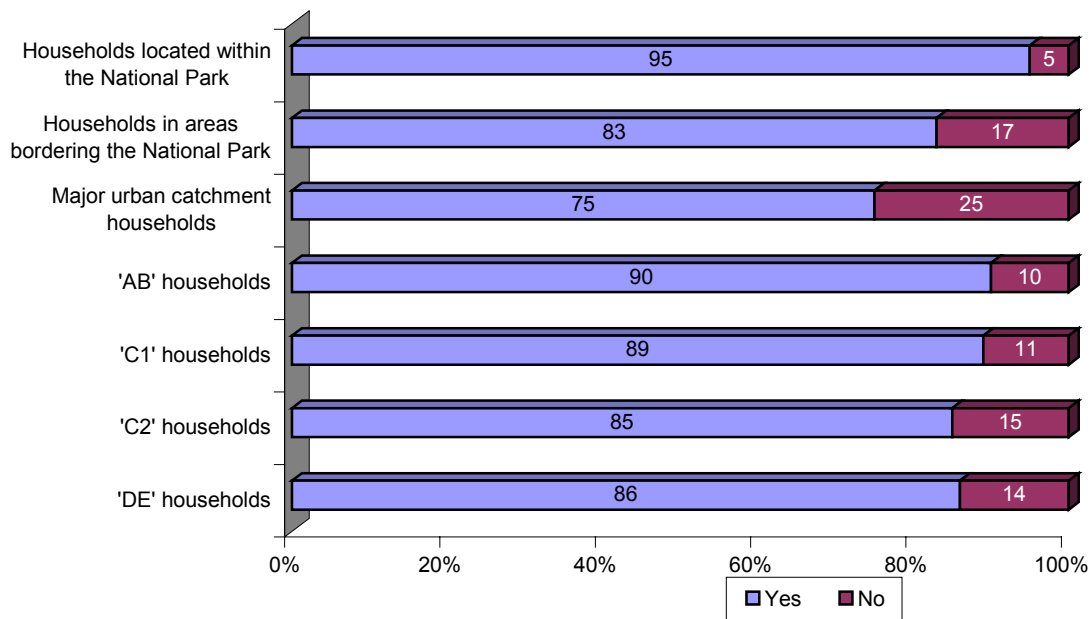
#### 4.7 Non-visitors

The level of non-visitation was generally very low (see Figure 20 overleaf). 87% of responding catchment area households contacted for household survey had made leisure or recreational visits to the New Forest within the previous 12 months. This included 95% of households located within the National Park, 83% of households located adjacent to the National Park and 75% of households in the major urban catchment towns/cities.

The results stand in marked contrast to the levels of local use of the proposed South Downs National Park. A local catchment area survey found that 51% of households had not visited the proposed National Park in the previous 12 months. Around 72% of these households could be described as lapsed visitors as they had visited the South Downs previously. For around 57% of these respondents, their last visit was four or more years ago. A minority of households surveyed (28%), had never visited the South Downs.

Visitors and 'non-visitors' were fairly evenly spread across the socio-economic categories, with 'ABC1' households only slightly more likely to have visited the Forest within the last 12 months than 'C2DE' households.

**Figure 20: Whether visited the New Forest for leisure or recreation within the last year- household survey results**



#### 4.7.1 Non-visitors & lapsed visitors

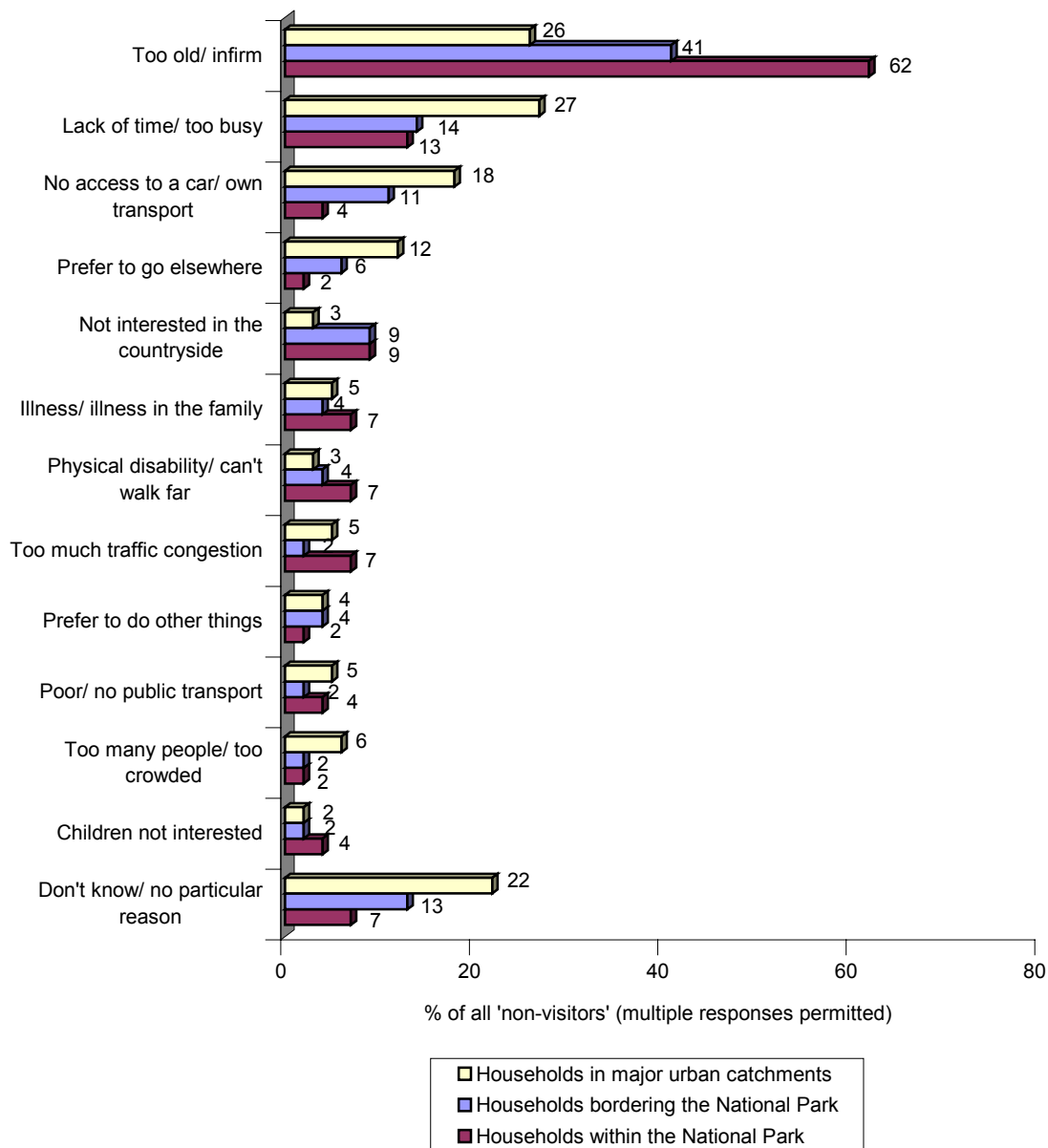
Of the 13% of catchment area households who had not visited the New Forest within the last year (n=281), 8% had never visited. 41% indicated that their most recent visit had been over a year previously, 16% had not visited for two years or more and 35% had not visited for 3 years or more.

Households who had not recently visited the New Forest were most likely to be 'empty-nesters', i.e. households consisting of adults aged 55+ years, with no children present within the household.

#### 4.7.2 Reasons for not visiting the New Forest

Reasons given for never or not recently visiting the Forest were most likely to include age/ infirmity (40%), lack of time/ too busy (19%), no access to a car/ own transport (12%). 7% indicated that they prefer to go elsewhere, 7% were not interested in the countryside and 15% didn't know or had no particular reason for not visiting.

**Figure 21: Reasons for not visiting the New Forest - all household survey respondents who had never or not recently visited**



A variety of other reasons for not visiting were mentioned. These are listed in full on page 126.

#### 4.7.3 What could be done to encourage more visits

'Non-visitors' were asked what aspects could be improved or provided to encourage future visits.

Overall, 63% said that 'nothing' could be improved or provided that would encourage them to visit. This included high proportions of those who said they were too old or infirm (69%), those who lacked time or were too busy (67%), those whose children were not interested (71%) and those who preferred to do other things (80%).

7% of non-visitors indicated that better provision of public transport services (to the New Forest) would encourage more visits, a further 2% mentioned better public transport services *within* the Forest and 2% would like transport for elderly people to visit. Not surprisingly, provision of better public transport services was most likely to be mentioned by those without access to their own car or transport.

Smaller proportions of non-visitors would like to see less traffic (2%), less crowding generally (2%) or more information about paths or walks (2%).

21% of non-visitor households mentioned a variety of 'other' aspects that might encourage them to visit. These responses are listed in full on page 128.

#### **4.8 Educational group visits**

Of the 107 Hampshire, Dorset or Wiltshire schools responding to the educational visits survey 81% were intending to visit a countryside site within the current academic year, including 58% who had visited or were intending to visit the New Forest.

##### **4.8.1 Sites visited & seasonality of visits**

Those schools intending to visit the New Forest were most likely to mention Calshot Activity Centre, the New Forest Museum and Visitor Centre or Longdown Activity Farm as places visited with educational groups. A wide variety of other locations were mentioned, including towns and villages (Lyndhurst, Beaulieu etc.), attractions, study/ activity centres, campsites, coastal areas and rural/ countryside areas. A full list of mentions, along with the month(s) visits were most likely to take place is provided in Table 93, page 127.

When the frequency of visits to each location is taken into account, Calshot Activity Centre again came out top of the list, followed by Lyndhurst town centre, Bolton's Bench, the Countryside Education Trust, the New Forest Museum & Visitor Centre and Longdown Activity Farm.

Educational visits were most likely to take place during May, June, July or October. Relatively few schools indicated that they visit the Forest over the winter months between December and April, and no visits were made or planned for August, during the school summer holidays.

##### **4.8.2 Group size & dwell time**

Groups were most likely to consist of less than 40 persons, with 24% of schools indicating that their average group size would be 30-40 persons. 21% of school groups were likely to consist of 10-20 persons and 19% were likely to consist of 20-30 persons.

Educational groups were most likely to visit the New Forest for a full school day (63%), with 19% tending to visit for half a school day and 11% making relatively short visits of less than 2 hours.

34% of schools made overnight visits to the Forest. The length of stay varied between 1 and 5 nights, averaging 3.1 nights. Overnight visits were most likely to include camping or staying at an activity centre.

##### **4.8.3 Mode of transport used**

Schools most frequently used a private coach or school bus to bring groups to the New Forest (58% and 40% respectively). 8% were located close enough to visit on foot and 5% tended to use parents cars.

##### **4.8.4 Purpose of visit**

90% of responding schools indicated that their visits related to curriculum based subjects. Geography, science, history and PSHE (personal, social and health education) were the curriculum subjects most frequently mentioned, although a wide range of other subject areas were mentioned (Table 98, p129).

25% of schools visited for non-curriculum based activities, including Duke of Edinburgh Award activities, team-building and social/ personal development.

#### **4.8.5 Expenditure on site**

Educational groups visiting the Forest tended to spend relatively little during their visits. Average expenditure per person during visits was less than £1 for 10% of groups, between £1 and £5 for 44% of groups and more than £5 per person for 13% of groups. 34% of groups expected to spend nothing during their visits to the Forest.

#### **4.8.6 Aspects spoiling visits**

Schools were asked whether anything had spoilt the enjoyment of recent group visits to the New Forest. Overall the response was very positive, with 92% of schools indicating that nothing had spoilt the enjoyment of their visit.

Aspects or issues mentioned included wheelchair access on gravel paths, potholes in the car parks, lack of toilets, insect bites and pestering by ponies.

### **4.9 Other organised group visits**

242 social, sporting, youth or special interest groups located within Hampshire, Dorset and Wiltshire were contacted regarding visits made by their group to the New Forest. Only 60 groups provided a response, however, this included a wide cross section of group or organisation types (Table 102, p131).

Responding groups who had made (or were planning to make) visits to the New Forest were most likely to include youth organisations, rambling groups, ornithology/wildlife groups, orienteering groups or natural history and other special interest groups.

#### **4.9.1 Sites visited & seasonality of visits**

Foxlease, Cadmans Pool, Wilverley, Fritham and Godshill Wood/ Inclosure were most frequently mentioned as having been visited by organised groups, however, a wide variety of other sites and locations were also mentioned (Table 104, p132). In terms of the frequency of visits made, Wilverley came out top of the list, followed by Foxlease and Stoney Cross.

Overall, in terms of the months organised group visits were most likely to take place, May (38%), June (41%) and August (41%) were most popular. Fewest visits took place during January (19%), March (16%) and December (19%).

Some groups visited only once or twice a year, while other groups visited frequently all year round.

#### **4.9.2 Group size**

Organised groups most frequently consisted of less than 20 individuals (49%). 22% of groups included 20-30 persons and 11% of groups consisted of 30-40 persons. Relatively few groups were large groups of more than 40 persons (18%), however, this did include three organisations whose average groups size was 100+ persons.

#### **4.9.3 Expenditure on site**

51% of organised groups indicated that their group members tended to spend little or no money during their visits to the Forest (less than £1 per person on average). 27% said their members tended to spend between £1 and £5, and 14% expected to spend between £5 and £10 on average during their visit.

#### 4.9.4 Aspects most enjoyed

Groups were asked what they particular liked about the locations they visited. Overall, good access/parking (27%), open spaces and freedom to explore (22%), wildlife (16%) and beautiful countryside (14%) were most frequently mentioned.

Other responses frequently related to the suitability of the location for the particular interest (e.g. interesting natural history, fungi etc.) or the activity undertaken on site (e.g. good for walking, circular routes, access for horse-boxes, good tracks for pony driving etc.). A full list of responses is provided in Table 108, p135.

#### 4.9.5 Aspects spoiling visits

84% of groups responding to the survey indicated that 'nothing' had spoiled the enjoyment of their recent visits to the New Forest.

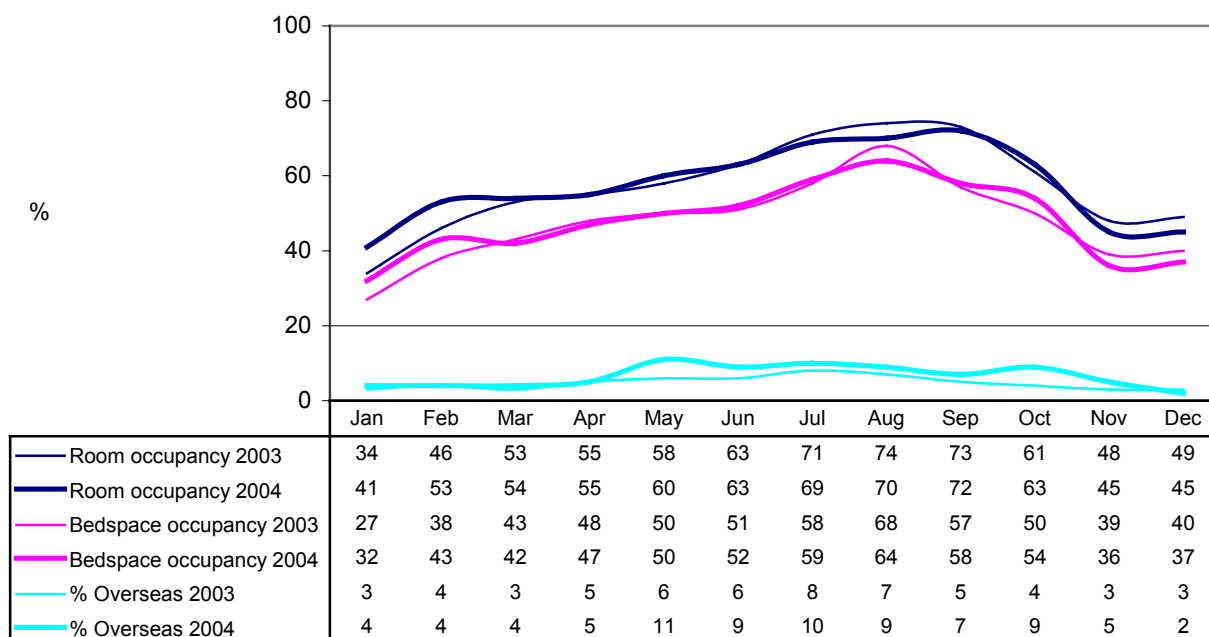
Of the remainder who mentioned aspects or issues of concern, theft from motor vehicles in car parks and parking restrictions or limitations at some sites were most frequently mentioned. Others mentioned car park closures without notice during the winter, traffic queues through Lyndhurst and the poor condition of some Forestry Commission car parks.

### 4.10 Accommodation occupancy

#### 4.10.1 Serviced accommodation occupancy

Room occupancy (for all serviced accommodation) averaged 55% during 2004, while bedspace occupancy (for all serviced accommodation) averaged 45%. Monthly room and bedspace occupancy levels show a seasonal trend, with highest occupancy levels achieved during August.

**Figure 22: New Forest serviced accommodation  
Average Room Occupancy (%), Bedspace Occupancy (%) & Percentage Overseas  
Guests**



The average length of stay in serviced accommodation in the New Forest (2004) was 1.8 nights.

The percentage overseas guests staying in serviced accommodation in the New Forest (2004) was 7%, comparable with the average for Hampshire (7%).

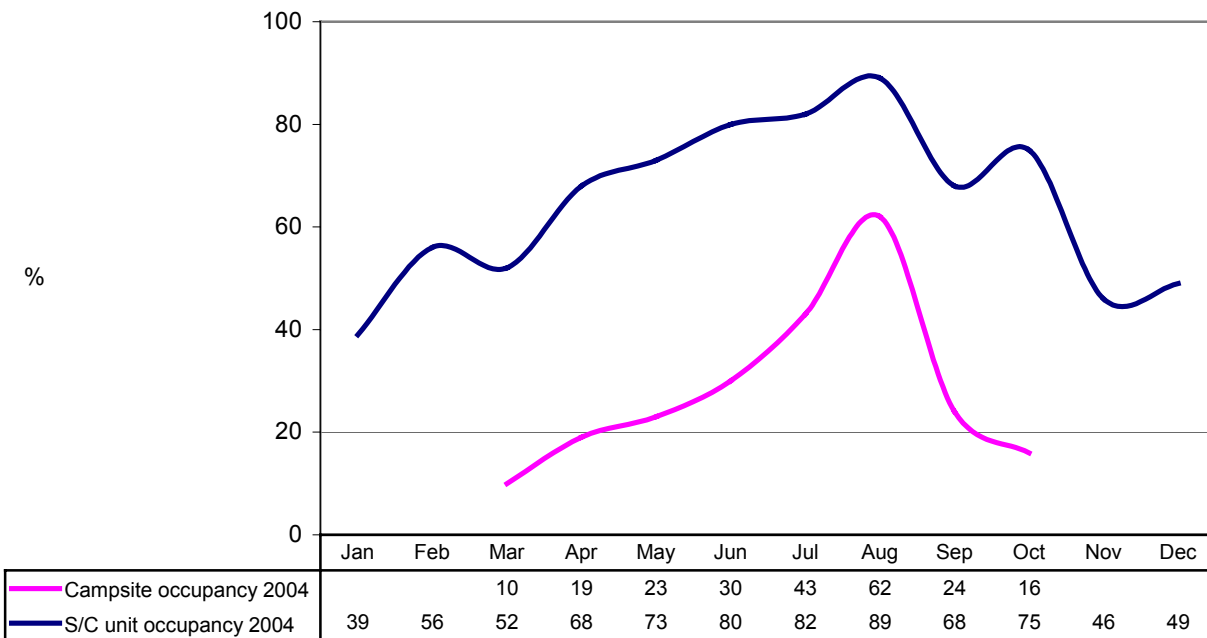
Weekday room occupancy in New Forest serviced accommodation establishments averaged 52% during 2004, while weekend room occupancy averaged 64%.

**4.10.2 Non-serviced accommodation occupancy**

Unit occupancy for New Forest self-catering accommodation (houses, cottages & flats) averaged 65% during 2004.

The majority of independent self-catering accommodation providers recorded full occupancy during the summer months, however, overall New Forest results include just under 500 ‘agency’ managed properties, not all of which achieved full occupancy during the summer months.

**Figure 23: New Forest non-serviced accommodation  
Average Unit Occupancy (%) for self-catering houses, cottages & Flats, Average Pitch  
Occupancy (%) for touring caravan and camping sites**



Pitch occupancy for New Forest touring caravan and campsites averaged 24% during 2004. Many of the campsites close over the winter months, so results are only shown where three or more campsites have been open for business and provided data.

Feedback from visitors and data returned from the participating campsites indicates that the New Forest campsites are full to capacity over weekends during the summer months, but had less than full pitch occupancy during the week.