New Forest National Park
Recreation and Leisure Visits

October 2018

Commissioned by: New Forest National Park Authority
On behalf of the Recreation Management Strategy Steering Group.

RJS
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Executive Summary

In 2004/05 research, undertaken by Tourism South East (TSE), found that were 13.55m visitor days to the New Forest National Park area for the purposes of leisure and recreation. Six organisations are working together to update the New Forest National Park Recreation Management Strategy 2010-2030. They wanted to know to what extent this figure has changed and is likely to change in the future. The approach adopted was to develop a model that applied relevant existing data (or drivers of change) to the 2004 base.

The key findings of this process were:

1. The New Forest National Park had an estimated 15.2m visitor days in 2017.
2. Visitor days in 2017 were up 12.4% on 2004 levels.
3. There were approximately 13.9m trips to the New Forest National Park in 2017.
4. These trips were made by 1.4m unique visitors in 2017.
5. The number of unique visitors has increased by nearly 22% since 2004. Trips have increased by 12.3%.
6. Walking the dog and going for a short walk were the main activities among visitors.
7. Main visitor activities varied by different visitor groups.
8. The pattern of main visitor activities is broadly the same as 2014.
9. Staying visitor groups (i.e. holiday makers staying in the NFNP, and visitors making day trips from holiday accommodation outside the NFNP) peaked in summer.
10. Day visitors from home were less seasonal – with trips spread more evenly throughout the year.
11. The greatest number of visitor days are generated by a small number of local walkers who visit very frequently throughout the year.
12. By 2037 there could be 17.6 million visitor days to the National Park.

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1 Introduction

1.1 Background

In 2004/05 a comprehensive piece of research was undertaken by Tourism South East (TSE). This looked at the numbers of visitors to the area that was to become the New Forest National Park, their characteristics and the resulting levels of different kinds of recreational activities. A key finding was that there were 13.55m visitor days to the National Park area for the purposes of leisure and recreation.

Six organisations are working together to update the New Forest National Park Recreation Management Strategy 2010-2030. They wanted to know to what extent the figure of 13.55m visitor days has changed and is likely to change in the future.

1.2 Approach and data

The approach adopted was to develop a model that applied relevant existing data (or drivers of change) to the 2004 base.

No new data were collected and the existing datasets that were used had some limitations. For example:
- Few datasets with consistent time series elements, particularly tourism ones, date back to 2004.
- Comprehensive and reliable data relating specifically to the New Forest do not exist.

This means that, as in 2004, the results can only be estimates. Pragmatic decisions and assumptions have been made in the modelling process as outlined in appendix 1.

1.3 Key terms

Figures within this report are concerned with visits to the New Forest National Park for **leisure or recreational purposes**.

As in the 2004 estimates, recreational visits **exclude** trips to the New Forest National Park for business and visiting friends and relatives (for personal and social reasons).

Key terms used in this report:
- **Trips** – the number of individual visits to the National Park.
- **Visitor days** – the total number of days (or part days) spent in the National Park. For a person visiting for the day, the number of visitor days will be the same as trips. A staying visitor is likely to generate multiple visitor days depending on their length of stay in the National Park and the number of days they spend outside the National Park.
- **Unique visitors** – the number of individual people visiting the National Park in a year. A unique visitor could make multiple trips and generate multiple visitor days over a year.
- **Day visitors from home.** A person travelling to the National Park from home and returning home on the same day. Day visitors are subdivided into four groups (or zones):
  - Zone 1: people living within the New Forest National Park boundary;
  - Zone 2: people living in areas adjacent to the National Park;

- o Zone 3: living in the urban areas of Southampton and Bournemouth beyond zone 2;
- o Zone 4: day visitors from further afield.
- **Holidaymakers staying in the New Forest National Park.** Visitors staying overnight for at least one night within the New Forest National Park area. This includes visitors staying in all forms of accommodation (including friends or relatives) and visiting for leisure purposes. They equate to one trip, and typically multiple visitor days.
- **Day trips from holiday accommodation outside the New Forest National Park.** These visitors are staying in the surrounding area (typically elsewhere in Hampshire but also Dorset, Bournemouth and Wiltshire) and visiting the National Park for the day from their holiday base. They equate to one trip, and one visitor day.
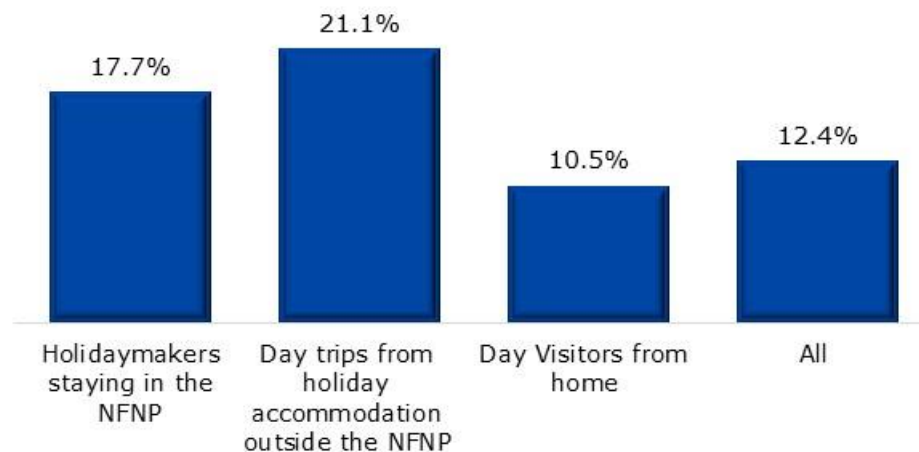
2 Visitor Days

Key finding 1: The New Forest National Park had an estimated 15.2m visitor days in 2017.

Visitor days are summarised in the following table.

Visitor Days		
	Visitor Days	
Visitor Categories	**2004**	**2017**
Holidaymakers staying in the NFNP	1,552,900	1,827,700
Day trips from holiday accommodation outside the NFNP	1,423,300	1,723,300
Day Visitors from home		
Zone 1: New Forest National Park residents	*2,038,800*	*2,150,400*
Zone 2: Adjacent to the National Park	*3,883,800*	*4,096,500*
Zone 3: Southampton and Bournemouth	*2,237,100*	*2,732,600*
Zone 4: Further afield	*2,419,500*	*2,710,600*
Total day visitors from home	10,579,200	11,690,100
All Visitor Groups	**13,555,400**	**15,241,100**

Key finding 2: Visitor days in 2017 were up 12.4% on 2004 levels.

Increase in Visitor Days to the New Forest NP (2017 over 2004)

Related findings:

- Day visitors from home are the biggest category of visitor. They accounted for 77% of total visitor days and were up 10.5% on 2004.

3 Trips and Unique Visitors

**Key finding 3: There were approximately 13.9m trips to the New Forest National Park in 2017.**

Key finding 4: Trips to the New Forest National Park were made by 1.4m unique visitors in 2017.

Key finding 5: The number of unique visitors has increased by nearly 22% since 2004. Trips have increased by 12.3%.

| New Forest National Park: Trips and Unique Visitors 2017			
Visitor Groups	**Unique Visitors ('000)**	**Trips ('000)**	**Visitor Days ('000)**
Holidaymakers staying in the NFNP	252	472	1,828
Day trips from holiday accommodation outside the NFNP	886	1,723	1,723
Day Visitors from home			
Zone 1: New Forest National Park residents	19	2,150	2,150
Zone 2: Adjacent to the National Park	36	4,096	4,096
Zone 3: Southampton and Bournemouth	85	2,733	2,733
Zone 4: Further afield	149	2,711	2,711
Total day visitors from home	289	11,690	11,690
All Visitor Groups	**1,409**	**13,886**	**15,241**

Unique Visitors, Trips, & Visitor Days
(% change - 2017 over 2004)
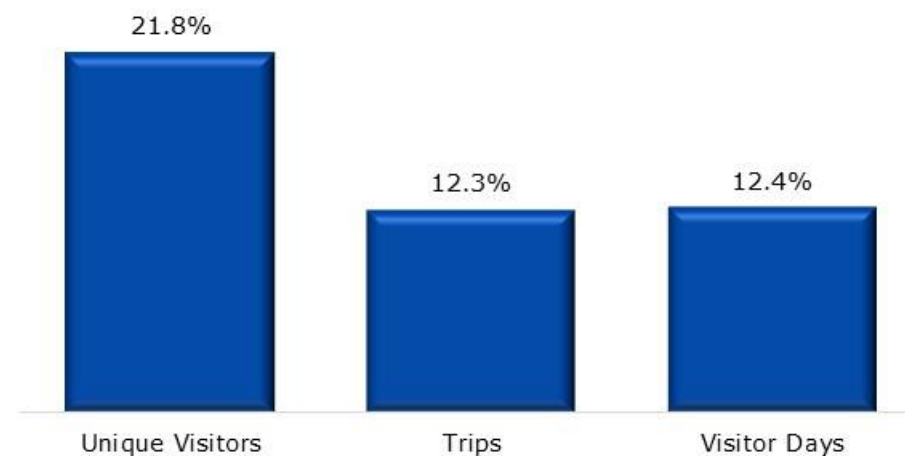
Related findings:

- The number of individual visitors increased from 1,156k in 2004 to 1,409k in 2017. Trips increased from 12,368k in 2004 to 13,886k in 2017.
- While 85% of trips were made by day visitors from home, they only accounted for 21% of unique visitors.
- Day visitors living in the National Park and the immediately adjacent area accounted for 45% of trips but only 4% of unique visitors. This was because these people, who live locally, have multiple trips each year.
- Day visitors from holiday accommodation outside the National Park were the largest group of unique visitors – they accounted for 62% of unique visitors but accounted for only 12% of trips.

Visitor group market share
- by visitor days, trips and unique visitors

Visitor Days	12%	11%	14%	27%	18%	18%
Trips	3%	12%	15%	30%	20%	20%
Unique Visitors	18%	62%	1%	3%	6%	11%
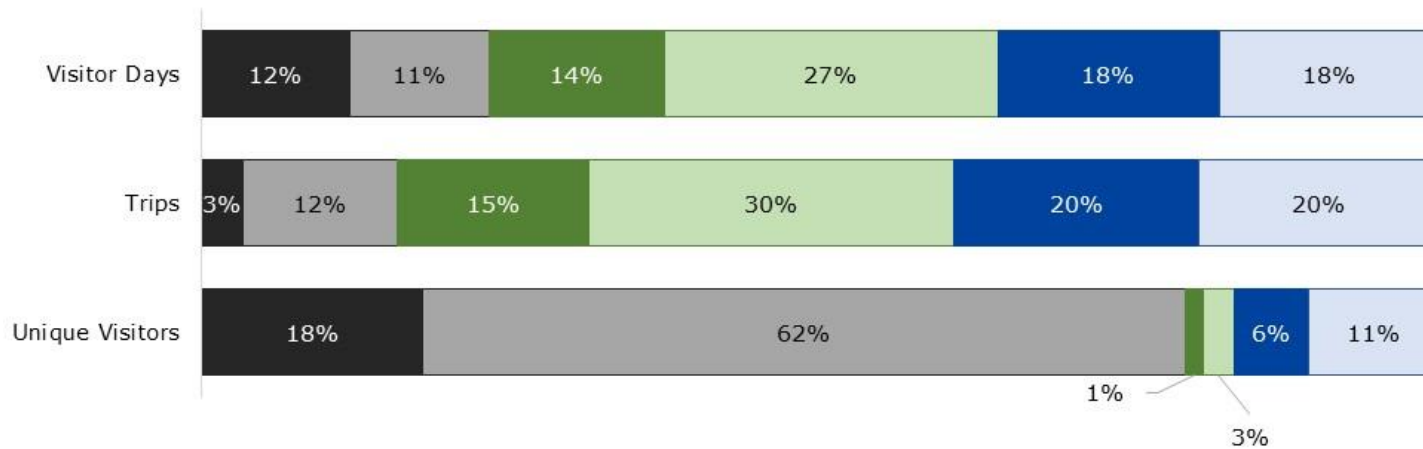
■ Holidaymakers staying in the NFNP   ■ Day trips from holiday accommodation outside the NFNP

■ Day visitors from home: NFNP residents   ■ Day visitors from home: Adjacent to NFNP

■ Day visitors from home: Southampton and Bournemouth   □ Day visitors from home: Further afield

4 Main Activities

Key finding 6: Walking the dog and going for a short walk were the main activities among visitors.

Related findings:
- People walking the dog as their main activity generated the largest proportion of visitor days (approximately 28% - or 4.2m visitor days).
- People on a short walk generated almost as many visitor days (25% - or nearly 3.9m visitor days).

New Forest National Park - Main Activities (Visitor Days ('000s) 2017)				
Main activity	**Day visitors from home**	**Holiday makers staying in the NFNP**	**Day trips from holiday accommodation outside the NFNP**	**All visitor groups**
Walking the dog	3,960	145	110	4,215
Short walk	3,116	413	338	3,866
Relaxing / enjoying view / picnicking etc	1,172	326	371	1,868
Long walk	777	170	114	1,060
Cycling - off-road	586	185	86	857
Visiting a town or village	304	213	300	817
Watching wildlife / nature / ponies	337	67	90	494
Driving around	266	46	83	395
Visiting a tourist attraction	98	39	53	191
Shopping	110	31	41	182
Visiting a pub, cafe or tearoom	101	33	34	168
Jogging / running	117	8	2	127
Horse riding	79	16	0	94
Cycling - on-roads mainly	55	32	5	93
Educational trip	55	30	5	90
Kite-flying	25	2	0	28
Water-based activities	11	2	7	20
Fishing	11	0	5	16
Other	511	71	79	661

Key finding 7: Main visitor activities varied by different visitor groups.

Related findings:

- Day visitors from home were much more likely to be walking the dog as their main activity than other visitor groups
- Holiday makers staying in the NFNP were more likely than other groups to be cycling (on and off-road), going for a long walk, and on an education trip as their main activity.
- Visitors on day trips from holiday accommodation outside the NFNP were more likely to be watching wildlife etc., driving around or visiting a tourist attraction as their main activity. Water-based activities and fishing were also, in relative terms, more important activities for this group.
- Both groups of staying visitors (i.e. those staying in the NFNP and those staying outside and visiting for the day), were more likely to be relaxing/ enjoying a view etc. or visiting a town or village as their main activity.
- Going for a short walk was a common activity across all visitor groups.

[1] NB data on main activities is based on the findings from the 2004 TSE Visitor Survey. A visitor survey, due its methodology, may under-represent certain groups. Road cyclists is potentially one group (since given the nature of their activity they are difficult to interview) Data from MENE suggests this group might be larger (in the region of 2-3% of trips).

New Forest National Park - Main Activities (% of visitor days 2017)				
Main activity	**Day visitors from home**	**Holiday makers staying in the NFNP**	**Day trips from holiday accommodation outside the NFNP**	**All visitor groups**
Walking the dog	33.9%	7.9%	6.4%	27.7%
Short walk	26.7%	22.6%	19.6%	25.4%
Relaxing / enjoying view / picnicking etc	10.0%	17.8%	21.5%	12.3%
Long walk	6.6%	9.3%	6.6%	7.0%
Cycling - off-road	5.0%	10.1%	5.0%	5.6%
Visiting a town or village	2.6%	11.7%	17.4%	5.4%
Watching wildlife / nature / ponies	2.9%	3.7%	5.2%	3.2%
Driving around	2.3%	2.5%	4.8%	2.6%
Visiting a tourist attraction	0.8%	2.2%	3.1%	1.3%
Shopping	0.9%	1.7%	2.4%	1.2%
Visiting a pub, cafe or tearoom	0.9%	1.8%	2.0%	1.1%
Jogging / running	1.0%	0.4%	0.1%	0.8%
Horse riding	0.7%	0.9%	0.0%	0.6%
Cycling - on-roads mainly[1]	0.5%	1.8%	0.3%	0.6%
Educational trip	0.5%	1.6%	0.3%	0.6%
Kite-flying	0.2%	0.1%	0.0%	0.2%
Water-based activities	0.1%	0.1%	0.4%	0.1%
Fishing	0.1%	0.0%	0.3%	0.1%
Other	4.4%	3.9%	4.6%	4.3%

Key finding 8: The pattern of main visitor activities is broadly the same as 2014.

Related findings:

- While the number of visits that involved walking the dog has increased from 2004, as a main activity it has decreased in relative terms (from 29.2% of visitor days in 2004 to 27.7% in 2017).
- A number of main activities have increased slightly in relative terms. These included going for a long walk, cycling (on-road and off-road), visiting a town or village and jogging/running.

Main Visitor Activites (% of total visitor days)

Activity	2004	2017
Walking the dog	29.2%	27.7%
Short walk	25.3%	25.4%
Relaxing/enjoying view/picnicking etc	12.3%	12.3%
Long walk	6.7%	7.0%
Cycling - off-road	4.9%	5.6%
Visiting a town or village	5.0%	5.4%
Watching wildlife/nature/ponies	3.3%	3.2%
Driving around	2.5%	2.6%
Visiting a tourist attraction	1.3%	1.3%
Shopping	1.1%	1.2%
Visiting a pub, cafe or tearoom	1.1%	1.1%
Jogging or running	0.7%	0.8%
Horseriding	0.7%	0.6%
Cycling - on-roads mainly	0.5%	0.6%
Educational trip	0.6%	0.6%
Kite-flying	0.2%	0.2%
Water-based activities	0.1%	0.1%
Fishing	0.1%	0.1%
Other	4.4%	4.3%

■ 2004 ■ 2017

5 Seasonality

Key finding 9: Staying visitor groups (i.e. holiday makers staying in the NFNP, and visitors making day trips from holiday accommodation outside the NFNP) peaked in summer.

Key finding 10: Day visitors from home were less seasonal – with trips spread more evenly throughout the year.

Related findings:

- 31% of trips by staying visitor groups (i.e. staying in or around the National Park) took place in July and August.

Seasonality of Trip
(% of trips)

Legend: ■ Day visitors from home ■ Staying visitors (in and around NFNP)
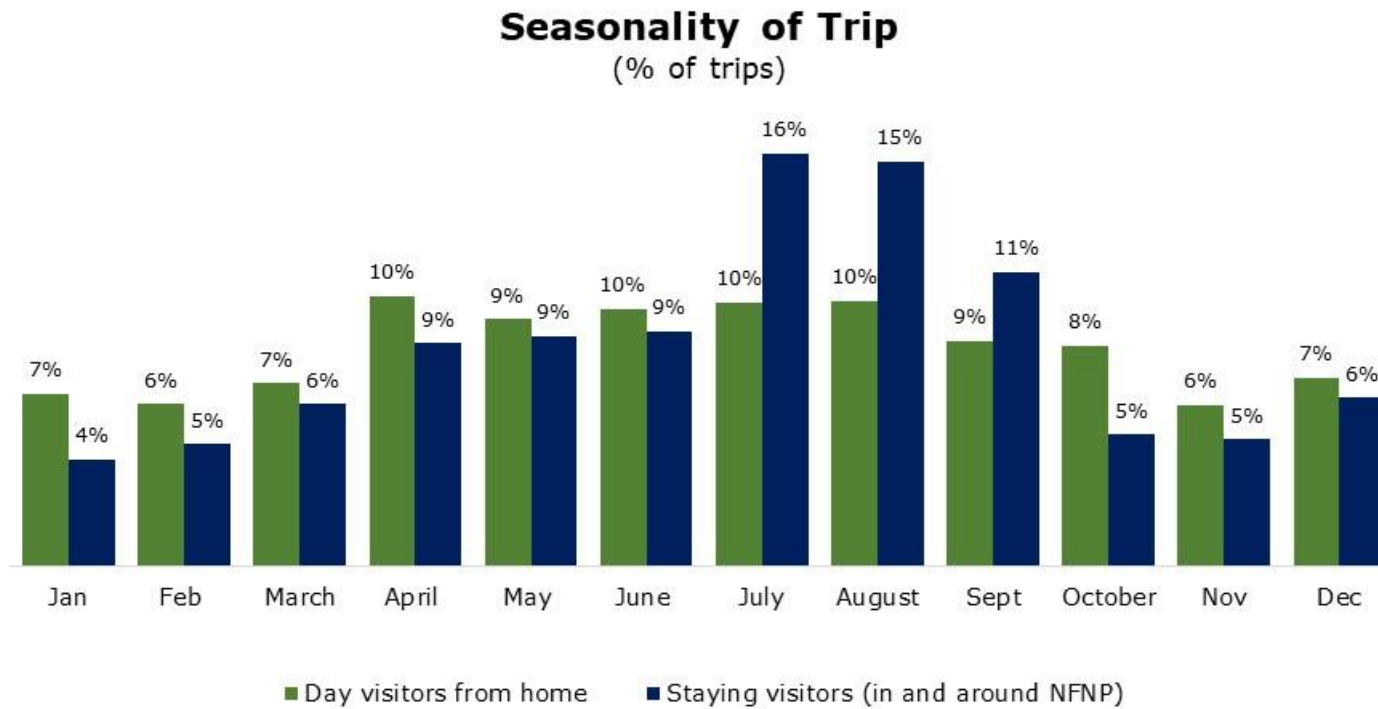
6 Implications

This section looks at the implications of previous sections in terms potential ease of engagement with different visitors. The chart (right) shows seven different market groups that visit for different activities, at different times of year and with differing frequencies. These factors will impact on the ease with which information can be provided to these people to help them enjoy recreation and avoid potential negative impacts.

The chart on the following page is similar but based on the number of unique visitors instead of visitor days. The seven groups are defined below.

Group	Definition
Walkers - local	Visitors resident in the NFNP and adjacent area (i.e. day visitor zones 1 and 2) and going for a short walk or walking the dog.
Walkers - day visiting	Day visitors from further afield (i.e. day visitor zones 3 and 4) going for a short walk or walking the dog
'Potterers' - day	Day visitors from home (all zones) whose main activities include visiting an attraction, town/ village, café/pub, driving around and shopping.
Outdoor leisure - day	Day visitors from home (all zones) whose main activities include relaxing, enjoying views, picnicking, and watching wildlife.
Outdoor active - day	Day visitors from home (all zones) those main activities include going for a long walk, cycling, horse-riding, fishing, flying kites, jogging, and water-based activities.
'Potterers' - staying	'Potterers' (as above) but staying (either in NFNP or the surrounding area).
Outdoor active / leisure - staying	'Outdoor actives' and 'outdoor leisure' (as above) but staying (either in NFNP or the surrounding area).

Key finding 11: The greatest number of visitor days are generated by a small number of local walkers who visit very frequently throughout the year.

This is a group that, in recreational management terms, will be one of the easiest to communicate with.

Market groups - seasonality, frequency and visitor days
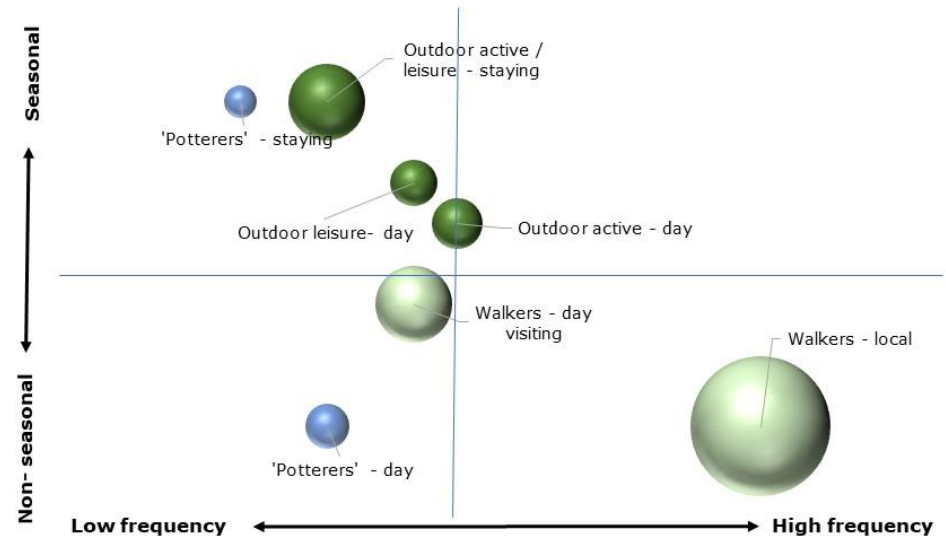
NB. Bubble size relative to number of visitor days.

Related findings:

- The two staying groups ('Potterers' and 'Outdoors') are the most seasonal showing a strong propensity to visit in summer. They comprise a large number of unique visitors who visit infrequently and may therefore be difficult to engage with.

Market groups - seasonality, frequency and unique visitors
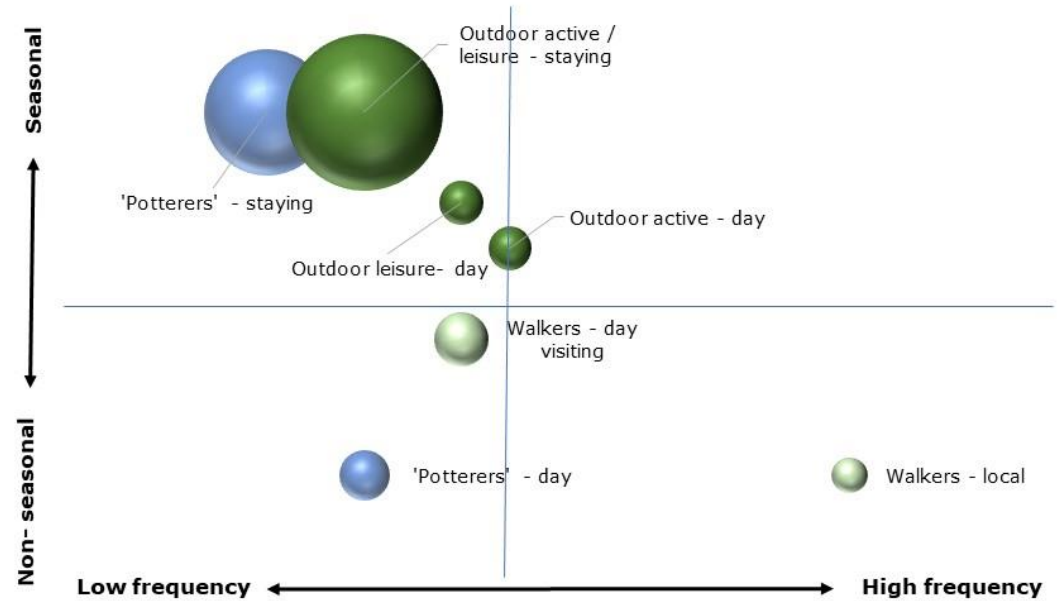
NB. Bubble size relative to number of unique visitors.

7 Future Visitor Days

Key finding 12: By 2037 there could be 17.6 million visitor days to the National Park.

The following table estimates the number of visitor days in 2027 and 2037. These are based on a **modest** growth scenario (see appendix 1).

New Forest National Park: Estimated Visitor Days in 2027 and 2037	Visitor Days ('000)		
Visitor Groups	**2017**	**2027**	**2037**
Holidaymakers staying in the NFNP	1,828	2,076	2,325
Day trips from holiday accommodation outside the NFNP	1,723	2,034	2,344
Day Visitors from home			
Zone 1: New Forest National Park residents	_2,150_	_2,251_	_2,336_
Zone 2: Adjacent to the National Park	_4,096_	_4,288_	_4,450_
Zone 3: Southampton and Bournemouth	_2,733_	_2,955_	_3,128_
Zone 4: Further afield	_2,711_	_2,892_	_3,013_
Total day visitors from home	11,690	12,386	12,928
All Visitor Groups	**15,241**	**16,496**	**17,597**

Estimated Visitor Days ('000s) – 2017 and 2037

12
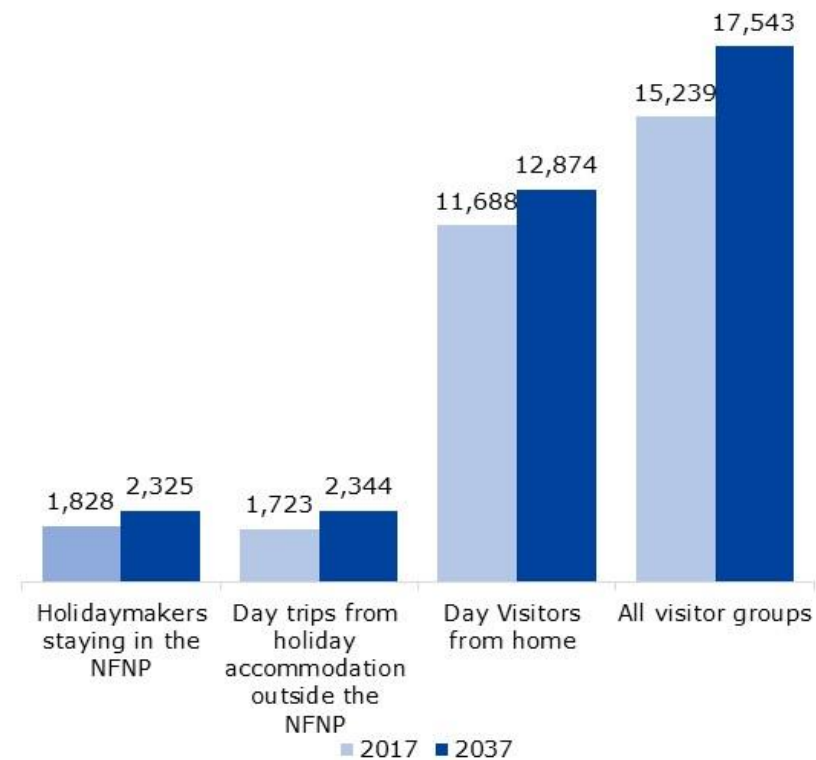
Appendix 1: Data Sources and Methodology

The 2004 Approach

In 2004/05 Tourism South East (TSE) undertook a major research project looking at visitor related research for the New Forest. This included three components: a visitor survey, a household survey and modelling estimates of trips and nights to the New Forest area.

The modelling of visitor figures was based around three groups of visitors.

1. **Holidaymakers staying in the National Park**. Estimates for this group were based on accommodation supply, occupancy (derived from surveys for serviced, self-catering, and touring caravans) or ratios of performance (for static caravans, second homes, and marinas – these were derived from the Cambridge Model), and the 2004/05 Visitor Survey (for visitor length of stay).

   The modelling process identified visits by purpose (visiting friends and relatives (VFR), holiday, and business) and the proportion of holiday days spent outside the National Park area by people staying in the National Park area (derived from the visitor survey). Business and VFR trips, and holiday days spent outside the National Park were excluded from overall estimates of visitor days.

2. **Day trips from holiday accommodation outside the NFNP**. These were based on a ratio of visitors staying inside the New Forest to the proportion staying outside. This was derived from the Visitor Survey.

3. **Day visitors from home**. These were divided into four zones: residents of the National Park area (zone 1); people living in adjacent areas (zone 2); people in Bournemouth and Southampton (zone 3); and people from further afield (zone 4). Estimated visitor levels for zones 1 to 3 were based on data derived from the Household Survey conducted by TSE as part of the 2004 work and population data (effectively number of trips per household). Figures for zone 4 were based on a ratio derived from the 2004 visitor survey (i.e. the proportion of trips from 'further afield').

Overview of the 2017 Approach and Data Sources

Whilst the 2004 estimates were based on significant primary research from the Visitor Survey and Household Survey, the 2017 estimates are based on calculating potential growth within the different visitor groups and extrapolating this forward from the 2004 base.

Developing potential growth rates for the different visitor groups has been based on available existing data. These had some limitations. For example:

- Few datasets with consistent time series elements, particularly tourism ones, date back to 2004.
- Comprehensive and reliable data relating specifically to the New Forest do not exist.

The following table provides a summary of main data sources considered and whether they were used in the 2017 modelling process.

2017 Visitor Estimates –Data Sources considered		
Data Set	**Description**	**Usage for 2017 estimates**
New Forest Specific datasets		
New Forest Visitor Survey 2004/05	Conducted by Tourism South East (TSE) with a sample of 3800+ respondents, this provides baseline data on visitors – for example, activities undertaken, frequency of visit, where people are staying, origin and overseas/domestic splits.	Provided the 2004 baseline. Used in a number of stages of 2017 visitor modelling – e.g. to identify activity segments, splits within certain market groups, and frequency of visit.
STEAM 2009 -16	STEAM is a model that provides volume (and value) data on the New Forest National Park. Data is available from 2009-16. Day visitor estimates are based on a different definition to the original 2004 survey, so it is of limited use. For staying visitors, STEAM does not provide data on visitors from the surrounding area but does provide data on staying visitors to the National Park. This is based on accommodation stock and occupancy data (derived from regional sources and other similar destinations).	Used to provide some of the estimates for levels of staying visitors in the NFNP.
Cambridge Model	The Cambridge Model is another model for estimating volume and value of visitors to an area. It adopts a different modelling approach to STEAM. The latest available data covers 2015 but this is for New Forest District (not the National Park).	Not used
New Forest Visitor Survey 2015	A visitor survey of the New Forest, with a sample size of 657, conducted by Bournemouth University. This provides data on day/staying splits, where visitors were staying, type of accommodation, length of stay, and frequency of visit. There is some comparability with the 2004/05 Visitor Survey (albeit slightly different categorisation in some areas) but it lacks	Not used

	the depth of coverage of the previous 2004/05 Visitor Survey (both in terms of sample size and questions asked – e.g. activities).	
New Forest Visitor and Residents Survey 2011	As above with a sample of 919.	Not used
Audience Development Plan (2014)	Contextual document but limited data for modelling purposes.	Not used
Winter Bird Survey Dog and People analysis	Site specific counts of walkers and dogs undertaken by bird surveyors from October to March. This provides a time series data from 2011 to 2017.

Data is too limited in geographical and time coverage to be used for modelling purposes. | Not used |
| Accommodation Supply Data | The TSE 2004/05 study provided data on accommodation supply by different categories of accommodation. TSE do not have any accommodation stock data but Global Tourism Solutions (GTS) have provided contemporary data on accommodation stock used in the STEAM model. This includes serviced, self-catering, and caravan and camping accommodation excludes certain accommodation categories – including marinas and second homes.

Web searches provided an updated figure for supply of marina berths in the New Forest NP. The supply of second home accommodation was updated by extrapolating the supply estimated in TSE 2004/05 study by an annual growth rate. This was calculated by comparing the number of second homes/ holiday lets/vacant houses available in New Forest District (the lowest level the data is available) from the 2001 and 2011 census. | Used to update estimates of staying visits in marina and second home accommodation. |

Accommodation Occupancy data	Occupancy data was available in the TSE 2004/05 study for serviced, self-catering, and touring caravan accommodation. TSE no longer collect this data. Serviced accommodation occupancy data is available but only at a regional (South East) level.	Not used
Annual Survey of Visits to Attractions	This is a national survey conducted by VisitEngland (VE). It provides annual data on some individual (but not all) attractions in England. Consistent data is available from 2004 on several attractions in and around the NFNP.	Used as a growth driver for the attractions day visitor segment.
New Forest Visitor Centre	Time series data on the number of visits to the visitor centre is available from 2007. This is too specific a dataset to use for modelling. In addition, visits to the centre could be influenced by wider changes in information provision (e.g. in destination use of digital sources) rather than reflecting wider trends of visitors to New Forest National Park.	Not used
Seawall Counters	Data on numbers of walkers (and bikes) from a variety of locations including Lymington Seawall, Keyhaven Marshes, Pennington Lane (all with data from 2009), Keyhaven Bottom, Pennington Lane (Bikes), and Ancient Highway (Footfall and bikes). The last three are generally available from 2015. Data is available on a monthly basis. The lack of consistent long-term data does not make this suitable for modelling potential growth. The monthly data does provide potential New Forest level seasonality data.	Used to provide data on seasonality of visit for certain visitor groups (day visitors – walkers and hikers)
Forestry Commission bike counters	Counters on five sites which provide monthly data from 2013. The data has gaps (due to counter related issues). This allied to the relatively short	Not used

	time series and site-specific nature does not make it suitable for model development purposes.	
National / Regional Data		
Monitor of Engagement with the Natural Environment (MENE)	This is a national survey of recreational countryside trips. The survey is funded by Natural England, with support from Defra and the Forestry Commission. Time series data is available from 2009 to 2018. The survey provides data on volume of trips by activities undertaken. Data is available for England, Hampshire and New Forest National Park but the trend data shows a mixed picture of peaks and troughs. Applying a trend line from 2004 indicates a 47% increase in trips at the England level, 60% in Hampshire but a 1% decrease at New Forest NP level (which suggests some sampling issues). MENE is the survey that has the closest definition of a visitor to the one used in the TSE 2004/05 study for New Forest visitor estimates.	Used to calculate growth drivers and seasonality for certain day visitor segments
GB Day Visitor Survey (GBDVS)	This is a national survey of leisure day trips conducted on behalf of VisitEngland. Time series is available for 2011 to 2016. GBDVS has a narrower definition of day trips than MENE (in terms of distance travelled / time spent). GBDVS data is available on volume of trips and different activities undertaken on visit (covering a different range of activities than MENE) at an England and SE regional level. Applying a trend line to the data back to 2004 shows the volume of trips at the England level declined by 5% and by 1% at the SE level.	Used to calculate growth drivers and seasonality for certain day visitor segments

International Passenger Survey (IPS)	The IPS is a national survey of inbound visitors to Britain. It is conducted on behalf of VisitBritain (VB). Time series data is available from 1979 at a national level, and from 1999 at a county level. Data on number of trips and nights is available on Hampshire, Dorset and surrounding counties.	Used to calculate growth drivers for overseas staying visits in the area surrounding the New Forest NP.
GB Tourism Survey (GBTS)	GBTS (previously the UK Tourism Survey) is a national survey on domestic staying tourism trips. The data collection methodology changed in 2006. New Forest district and county data is available on trips and nights (for all purposes and holidays) from 2008 (based on a three-year moving average to address sample size issues). Applying a trend line from 2004 to 2017 shows a 28% increase in trips to New Forest district, 33% to Hampshire and 4% to the South East as a whole.	Used to calculate growth drivers for domestic staying visits and seasonality in the area surrounding the New Forest NP.
Road usage	Annual Traffic counts for the New Forest area are available from the Department of Transport from 2000 with counters on a number of local roads - A31, A326, A336, A337, A338, A35, A36, and M27. The data shows a modest increase in road usage from 2004 to 2017 – 5%. This is in line with population growth.	Not used
Rail station usage	Data is available on station usage from the Office of Rail and Road 1998 for Ashurst New Forest, Beaulieu Road, Brockenhurst, Lymington Pier, Lymington Town, New Milton and Sway. From 2004 to 2017 the data shows an increase of 21% in usage.	Not used

Population data	Annual estimates are available from 2004 to 2036 for New Forest District, Hampshire, Dorset and the SE region, and relevant unitary areas (like Bournemouth and Southampton).	Used calculate growth drivers for day visitor segments.
Walking and cycling statistics	The Active Lives Survey provides data on leisure cycling and walking to a Local Authority level but only from 2016. Longer term data is available on cycling but as a mode of transport (as opposed to leisure usage).	Not used

Estimates of Visitor Days

Visitor days for 2017 were calculated by extrapolating from the 2004 base. Different drivers have been used to calculate a growth rate for different visitor groups.

1. **Holidaymakers staying within the National Park.** The original estimates were based on accommodation supply and occupancy data. The 2017 estimates adopted a similar approach. Estimates of visitor days (and trips) staying in serviced, self-catering and caravan accommodation were based on STEAM data. Estimates of visitor days (and trips) of people staying in marinas and second homes were based on updated supply data and the ratios of trips per accommodation unit that were used in the TSE 2004/05 report.

   These figures provided an estimate of all visitor days and trips by staying factors. This was the adjusted to exclude business and visiting friends and relatives (VFR) trips, and visitor days spent outside the New Forest National Park. This adjustment was based on the ratios used in the original 2004 estimates.

2. **Day trips from holiday accommodation outside the NFNP**. This involved several stages of analysis:
   - Firstly, identification of where visitors were staying in the surrounding area based on three areas (Hampshire, Dorset, and 'elsewhere'). This analysis was based on the 2004/05 Visitor Survey.
   - Second, the split of these groups by visitor origin (i.e. UK and overseas). Again, this analysis was based on the 2004/05 Visitor Survey.

   - Thirdly, the application of a growth rate from 2004 to 2017 to these groups. For UK visitors, these rates were based on the growth in holiday visits (calculated from GBTS data) for Hampshire, Dorset and the South East region (used for visitors staying 'elsewhere'). For overseas visitors, drivers were derived from IPS data (for the same areas).

3. **Day visitors from home**. There are a number of different datasets that give a potential indication of changes in levels of day visiting (e.g. MENE, GBDVS). These datasets suggest different (and conflicting) growth rates. As such, estimates of current levels of visiting have been based on two growth drivers – population and segment specific growth factors.

   The analysis process was:
   - Visitors from the four day visitor zones used in the original estimates (e.g. the New Forest, adjacent areas) were categorised into nine different segments based on their main activities within the New Forest. This analysis was based on data from the 2004/05 Visitor Survey.
   - A driver of change factor was calculated for each of the segments (by area). This was based on a combination of two factors. Firstly, population growth in the respective zone. Hampshire, Dorset (excluding Bournemouth), and Wiltshire's population growth was used for visitors from Zone 4 (further afield) since the 2004/05 Visitor Survey highlighted that most visitors from 'further afield' were from these areas.
   - The second growth factor was segment specific. The assumption was that while growth in day visitors to the New Forest will reflect population growth to some extent, other factors are relevant, e.g. changing

leisure patterns and consumption. There was evidence (from national surveys like MENE and GBDVS) that there has been differential growth in different market segments. Some activities are relatively mature, and growth would not necessarily be disproportionate. Other areas are emerging - with higher growth rates. For each segment a growth rate has been calculated (see below). Data sources for these varied slightly by segment.

- MENE trend data was used for six of the nine segments (Dog walkers, walkers, hikers, outdoor activities, cycling/jogging, and outdoor leisure). MENE was the most comprehensive for outdoor activities and closely mirrored most of the New Forest segments. The ratios of differential growth were based on England data (which has the most robust sample size). They were derived from percentage growth in a segment (e.g. cycling) relative to all trips. This ratio was then applied to population growth to produce a combined growth factor. So, for a segment that has grown at a faster than average (for example cycling), growth in the New Forest has been assumed to be greater than average population growth.
- GBDVS data was used for two of the segments ('Potterers' and 'Others'). The approach adopted was the same as above but GBDVS was felt to reflect these segments more closely than any of the activity groups covered in MENE.
- For one group (Attraction visitors) a different approach was used. This was an overall growth rate (as opposed to the combined growth rates for other segments) based on actual visits to attractions in and immediately around the

National Park. Data was derived from the Visits to Attractions survey using attractions with a consistent data set from 2004.

Numbers of Unique Visitors

The section above outlines the approach to estimating visitor days and trips. Data on frequency of visit to the New Forest National Park was used to translate the number of trips into number of unique visitors.

Frequency of visit for each visitor group (i.e. day visitor by zone, staying in and outside the National Park) and segment (based on activities) was derived from the 2004/05 Visitor Survey. Outlying values of frequency of visit were removed where these had a significant impact on the overall average. These were as follows:

- Day Visitors from home– zones 1 and 2: up to 364 visits a year
- Day Visitors from home – zones 3 and 4: up to 350 visits a year
- Holidaymakers staying within the National Park: up to 50 visits a year
- Day trips from holiday accommodation outside the Park: up to 50 visits a year.

Seasonality

Seasonality was calculated by applying data on month of trip to different visitor groups/segments. This was data was derived from a number of sources:

Market Group / Segment	Data source
Holidaymakers Staying in the National Park	STEAM
Day trips from holiday accommodation outside the NFNP	GBTS – holiday trips to the South East
Day Visitors from home	
Dog walkers	MENE (average 2014 and 2015)
Walkers	Seawall counters (average of 2015-17 data)[2]
Outdoor leisure	MENE (average 2014 and 2015)
Potterers	GBDVS (2016)
Cyclists and runners	MENE (average 2014 and 2015)
Outdoor Activities	MENE (average 2014 and 2015)
Hikers	Seawall counters (average of 2015-17 data)
Other	GBDVS (2016)

Future Visitor Days

Future visitor levels to the New Forest National Park will be influenced by a range of factors. These will include more local factors like product development (in accommodation and new attractions/activities), accessibility and transport infrastructure, population growth (which, in turn, influences and covers impacts on new housing development in the area), and broader factors like social trends, and economic factors (such as the exchange rate, interest rates, disposal income).

As a consequence, any projections of future visitor levels would be somewhat speculative.

The approach adopted to calculating future visitor days was similar to the approach to estimating 2017 visitor days. A growth rate was applied to the different market groups/segments. This was based on the growth factor used to calculate the 2004 to 2017 change and, in the case of day visitors, projected population growth. In some instances, segment specific growth factors were adjusted (from the ones used for 2004 to 2017 growth) where they were perceived to be either too high or low. This was largely a subjective view based on our experience.

The assumptions are based around a low to modest growth scenario.

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[2] Data from the Seawall counters was compared with MENE seasonality data for walkers. The datasets were similar. The Seawall data was used on the basis it was specific to the NFNP.

The following table summarises assumptions on growth factors,
and the annual growth rate per market group / segment.

Market Group / Segment	Annual growth rate (%) (2037 / 2017)	Assumptions / notes
Staying in the National Park	1.36	Assumed to be the same as 2004 - 2017
Staying outside the National Park	1.8	Assumption – based on 2004 – 2017 (where the modelled growth rate was 1.88% per annum)
Day Visitors		
Dog walkers	0.36	This is a mature / functional market and growth has assumed to reflect population growth.
Walkers	0.65	Assumed to grow at a slightly higher than population rate (reflecting social trends). The segment growth factor was the same as 2004/17.
Outdoor leisure	0.42	Mature market – assumed to grow in line with population.
Potterers	0.58	Assumed to grow at a slightly higher rate than population growth (but at a lower rate than 2004-17).
Cyclists / runners	0.78	Assumed to continue to be a growth market in line with social trends (but the growth rate assumed to be at a lower rate than 2004-17).
Outdoor Activities	0.43	Assumed to grow at a slightly higher than population rate (reflecting social trends). The growth factor was slightly higher than 2004/17 (which reflected a downturn in field sports).
Hikers	0.67	Assumed to grow at a slightly higher than population rate (reflecting social trends). The segment growth factor was the same as 2004/17.
Other	0.41	This is a diverse market. Growth has assumed to reflect population growth.