**ENVIRONMENT OVERVIEW AND SCRUTINY PANEL – 11 JUNE 2020**

# NEW FOREST VISITOR STUDY 2018/19

## 1.1 INTRODUCTION

1.2 It has been recognised for some years that additional development in and around the New Forest has a potentially harmful impact on the nature conservation designations within the National Park, and that to comply with both national and international legislation to protect the designated sites within the New Forest measures need to be taken to avoid or mitigate these harmful impacts. Since 2009 this Council's Local Plans have had specific policies required to mitigate the potential harm resulting from recreational pressures from new development. However, the approach taken by other local planning authorities in the area around the New Forest to the recreational impacts on the New Forest arising from development in their area has been patchy.

1.3 In January 2018 a new study was commissioned by a partnership of local planning authorities - Test Valley Borough Council, Eastleigh Borough Council, New Forest District Council, New Forest National Park Authority, Southampton City Council and Wiltshire Council – working together with Natural England and Forestry England with funding from central government. Phase one of the study has concentrated on establishing a robust evidence base to understand future pressure on the internationally protected habitats of the New Forest from increased population and visitor numbers. This has now been completed. The second phase will be to develop a joint strategic mitigation framework.

1.4 The research is the most comprehensive survey of recreational use of the New Forest since 2004/5 when Tourism South East surveyed visitors to the area that was to become the National Park. (It did not specifically look at the visitor use of the protected nature conservation sites.)

## 2. THE SURVEYS

2.1 Specialist consultants Footprint Ecology were commissioned by the partnership organisations to undertake the visitor surveys on their behalf. Footprint Ecology have done similar work in protected habitats across the UK and have a good knowledge of the New Forest, having done previous studies in the area.

2.2 For the research three different types of surveys were undertaken.

- On-site visitor surveys
- Telephone surveys
- Vehicle counts

## 2.3 On-site Visitor Surveys

2.4 In a period between 2018 to 2019 surveys took place at 60 locations, mostly car parks across the New Forest SPA/SAC/Ramsar. At each location, 40 hours of survey work were conducted, split to cover a weekday and a weekend day in the autumn/winter (October – November), a weekday and a weekend day in the spring (April – May) and a single day in the summer (late July – August, school holiday period). Surveys were broken into two-hour periods that were spread to cover different parts of the day (i.e. including early mornings and late evenings). Tally counts of people, dogs, bikes and horses were maintained for each two-hour survey period and a random selection of

people seen were approached and interviewed. In total 5,236 interviews were conducted.

2.5 **Telephone Surveys**

2.6 A survey of 2,000 people living with 25km of the New Forest SPA/SAC/Ramsar sites was undertaken by telephone. People were randomly selected. Sampling was weighted to the nearer 5km bands to ensure more interviews were conducted with those living relatively close to the New Forest. Within each band, a target number of interviewees was identified that reflected the amount of housing within each local authority. (The Isle of Wight was excluded.) The questionnaire identified households who had visited the New Forest and asked questions relating to the reasons for visiting, activities undertaken and their visit patterns. For those that did not visit the New Forest woodland and heathland the questions probed the reasons for not visiting. For all visitors, basic visitor profile data were also collected.

2.7 **Vehicle counts**

2.8 Five transect routes were driven concurrently on 15 survey dates, spanning an entire year between October 2018 and September 2019. The routes were chosen to ensure that all formal car parks within the New Forest SAC/SPA/Ramsar site were included in the counts and also numerous more informal parking locations (lay-bys etc.). Locations such as grass verges (where people sometimes park at random) and town/village centre car parks were not included. The 15 survey dates spanned a range of day types, including weekends and weekdays, as well as periods during term time and the school holidays, and bank holidays and the festive period. In total 270 parking locations (comprising 147 formal car parks, 33 gateways/start of tracks, and 90 laybys), with a total capacity of 4,813 parking spaces were covered.

2.9 The reports of these three surveys can be viewed on the New Forest National Parks website at: https://www.newforestnpa.gov.uk/conservation/managing-recreation/future-forest/research-into-recreational-use-of-the-new-forests-protected-habitats-footprint-ecology-2020/ .

2.10 The key findings from the three types of survey are set out in Appendix 1 to this report.

## 3. OTHER REPORTS FROM THE STUDY

3.1 Two further reports have been prepared by Footprint Ecology as part of the study:

- Recreation use of the New Forest SAC/SPA/Ramsar: Overview of visitor results and implications of housing change on visitor numbers

- Recreation use of the New Forest SAC/SPA/Ramsar: Impacts of recreation and potential mitigation approaches

3.2 These two reports set out the context of the second phase of the work to develop a joint strategic mitigation framework. The survey work has already produced fresh evidence that residential development within 25km of the New Forest (and to a lesser extent beyond) has potential to produce adverse impacts on the New Forest because of its recreational use by residents. The research indicates local planning authorities beyond this district need to be seriously addressing the effects of development in their area on the internationally important nature conservation sites in the New Forest.

**Implications of housing change on visitor numbers**

3.3 The study found that around 129,222 new dwellings may come forward within 25km of the New Forest SAC/SPA/Ramsar over the period 2018-2036 (based on levels of planned development at the time of the study). This would represent a 16.4% increase in housing within the 25km. It is predicted that this would result in an increase of around 11.4% in the number of visits. This level of change solely relates to an increase in access from new housing within the 25km and additional visitors may come from further afield – for example tourist visits. Clearly, further increases in house numbers in the area will further increase pressures on the protected habitats. Of the extra visits predicted some 57% will be generated by new dwellings within 10km of the New Forest SPA/SAC/Ramsar site. 34% will arise from visits from dwellings in the 11-25km distance band, which stretches from Swanage in the west, Andover in the north and Portsmouth in the east.

3.4 Extra houses close to the SAC/SPA/Ramsar will lead to more extra visits to the SAC/SPA/Ramsar than the same number of extra houses further away as people who live closer visit more. Modelling work predicted that one dwelling in the 0-1km distance band around a given access point will, on average, generate a similar number of visits (to that access point) as 10 dwellings at 5km distance or over 90 dwellings at 10km.

**Impacts of recreation and potential mitigation approaches**

3.5 The report includes the following diagram which summarises the potential adverse recreational impacts of visitors.

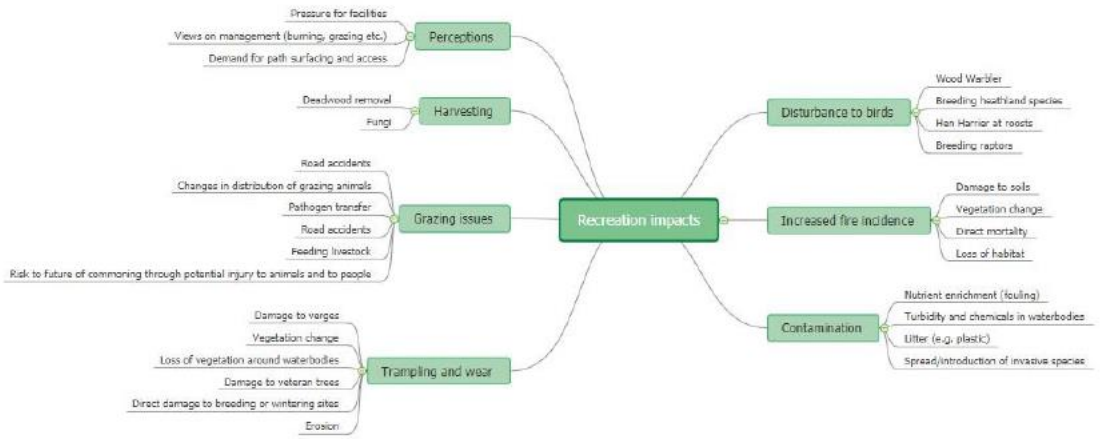


**Figure 2: Summary of recreation impacts including examples of features and species affected.**

3.6 Many species in the New Forest are already not doing well. More visitors will increase the pressure in general, exacerbate the current issues and there is the potential for further impacts.

3.7 The report sets out a suite of mitigation measures that should be considered, and notes that different approaches may be needed in different areas (related to distance from the New Forest). Many of the measures identified have formed part of the mitigation package which this Council has been applying to enable development since 2014, and as revised in the Local Plan Review (Policy ENV1).

3.8 Measures identified come under the broad headings:

- Alternative recreational greenspace sites and routes outside the New Forest SAC/SPA/Ramsar;
- Access management within the New Forest SAC/SPA/Ramsar;
- Educational and communications activities, both within and outside the New Forest SAC/SPA/Ramsar;
- Monitoring; and
- Other (siting of development to avoid/reduce impacts).

3.9 The report states that:

> "Together, the measures identified could form a 'package' of avoidance and mitigation measures that should resolve the cumulative impacts from recreation associated with housing growth around the New Forest. Such a package should enable Local Authorities to be able to rule out adverse effects on integrity to the New Forest SAC/SPA/Ramsar as a result of increased recreation associated with Local Plans. The measures will however not necessarily be easy to establish and will require significant impetus to achieve. Given the broad geographic scope and need for measures to dovetail, it will be important that there is a strategic, proportionate and co-ordinated approach, which will require partnership working across a range of local authorities and stakeholders."

## 4. NEXT STEPS

4.1 This Council has a well-established recreational impact mitigation strategy in place. The Council's approach has been confirmed as 'sound' at part of the Local Plan Review 2016-2036 public Examination. The results of the study confirm that additional residential development in the district outside the National Park, have a proportionately higher impact on the protected nature conservation sites than locating development further away, and as a consequence the mitigation measures required in this area are greater. However, the results of the New Forest Visitor Study do not indicate any need for a revised approach to mitigation in this Council's planning area (the district outside of the National Park). Nonetheless, the studies do provide valuable information about the nature of the recreational use of the New Forest by the district's residents and this information will assist in refining the design and implementation of our projects to provide alternative recreational greenspace sites and routes.

4.2 It is important that we continue to collaborate with adjoining Authorities in the development of a strategic, proportionate and co-ordinated approach to mitigation of recreational impacts on the New Forest in a wider geographical area.

## 5. CONCLUSIONS

5.1 The New Forest Visitor study provides a wealth of information which will improve the level of understanding and nature of the impacts on the New Forest arising from recreational visits, including those which will result from higher levels of development in the area.

5.2 It suggests a range of possible measures which local planning authorities will need to consider and implement to ensure development in their area does not result on harmful impacts on the New Forest SAC/SPA/Ramsar.

## 6. FINANCIAL IMPLICATIONS

6.1 No direct

## 7. CRIME & DISORDER IMPLICATIONS

7.1 None

## 8. ENVIRONMENTAL IMPLICATIONS

8.1 The understanding gained from the New Forest Visitor Study will contribute positively towards the long-term protection of the New Forest SPA/SAC/Ramsar sites.

## 9. EQUALITY & DIVERSITY IMPLICATION

9.1 None

## 10. DATA PROTECTION IMPLICATIONS

10.1 None

## 11. RECOMMENDATIONS

11.1 That the report be welcomed.

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**Background Papers:**

Published documents

**Appendix 1**

# Key Finding of Footprint Ecology Surveys

## Visitor Survey

• 83% of interviewees were on a short visit directly from home that day. Those staying away from home on holiday accounted for 14% of interviewees and a further 2% were staying with friends or family.

• During the summer there were relatively more holiday makers (22%) and fewer day visitors (76%), compared to the spring (12% and 85% respectively) and the winter (11% and 86%).

• For most interviewees the main activity was given as either dog walking (55%) or walking (26%). No other single main activity was named by more than 5% of interviewees.

• Dog walking was very much focussed around the peripheral areas of the SPA/SAC, while walking (without a dog) was the most common main activity at the more central survey locations. Cyclists were interviewed at scattered locations but notably those around Brockenhurst and also at Burbush Hill

• Overall, 61% of interviewees were accompanied by at least one dog and the maximum number of dogs per interviewed group was 12. In total, 4,807 dogs were counted accompanying interviewees, giving an average of 0.9 dogs per interviewee.

• Dog walkers accounted for a slightly lower proportion of visitors in the summer compared to the other times of year. 60% of dogs were seen off lead by the surveyor during the interview.

• 26% of interviewees tended to visit the New Forest SPA/SAC/Ramsar site on a daily basis.

• Dog walkers were the most regular visitors, with 41% of dog walkers indicating theyvisited on a daily basis and a further 14% of dog walkers indicating they visited more than once per day.

• Typical visit duration for all interviewees was around 95 minutes. Those visiting to play golf and for Duke of Edinburgh tended to visit for longer and those dog walking and running typically had relatively short visits.

• 64% visited equally all year round and did not tend to visit at a particular time of year.

• 90% had arrived by car/van or other motor vehicle.

• Reasons given for the choice of specific location to visit that day included: close to home (or work or holiday accommodation) (25%), previous knowledge or familiarity (16%), quick & easy travel route (10%), scenery/variety of views (10%) and for a change/variety (10%). Some 2% had stopped at random and 1% had been deflected from other locations because they were full or because the car park was shut.

• Interviewee routes were mapped as part of the interview. Route lengths tended to be shorter in the summer (for dog walkers and cyclists at least) and cyclists tended to do much longer routes than the other activities.

• Across all seasons, the typical (median) dog walk was 2.7km, typically extending to 922m from the start point. For walkers the equivalent values were 3.2km and 1,004m and for cyclists 12km and 2,828m.

• Factors influencing the choice of route included: previous knowledge of the location (22%), time available (13%), weather conditions (such as shade or shelter etc.,12%), following a marked trail or the paths available (12%) and activity specific factors (such as where the buggy could go, golf course etc., also 12%).

• Maps were the most commonly cited type of information used to plan interviewee's visits (15% of interviewees), followed by websites (8%) and recommendations from friends or family (7%).

• 67% of interviewees were aware of a wildlife habitat or species that could be affected by recreation and could give a named example. Breeding birds (including 'ground-nesting birds') were the most commonly named concern (40% of interviewees).

• For those interviewees on a short visit or day trip, travelling directly from home that day, 41% indicated that all their visits for their chosen activity took place within the New Forest SPA/SAC/Ramsar.

• A wide range of other, alternative locations were given. Those most frequently cited included Hengistbury Head (4%), Lepe Country Park (3%), Barton-on-sea/Barton-on-sea beach (2%), Purbeck (2%), Lymington Marshes (2%), Highcliffe/Highcliffe Beach (3%), Southampton Common (2%), South Downs (2%) and Bournemouth Beach (2%).

• The was little difference in the proportion of interviewees that would use a new Country Park or improved footpath network away from the New Forest SPA/SAC/Ramsar site, suggesting relatively little difference in these as mitigation approaches.

• 4,871 interviewees (91%) gave a full, valid UK postcode that could be geocoded using the national database.

• The Bournemouth/Poole conurbation was the single built-up area from which the most interviewees originated (12%), with the South Hampshire built-up area second (9%).

• 20% of interviewees on a short visit or day trip from home that day gave postcodes within the National Park boundary. A further 40% came from outside the National Park but within the New Forest District. Other local authorities accounted for relatively small proportions of the interviewees in comparison.

• 62% of interviewees lived within a 5km radius of the New Forest SPA/SAC/Ramsar site boundary. The median distance for all interviewees from their home postcode to the interview location was 7.75km and 75% originated from within 21.4km; for those on a short visit/day trip from home, the equivalent values were 6.1km and 13.8km.

## Telephone Survey

• 95% of interviewees visited greenspaces (any greenspaces, not just the New Forest) for recreation or leisure.

• Each interviewee typically makes around 130 visits to greenspaces (any greenspaces, not just the New Forest) per annum. Residents of the urban centres of Bournemouth, Southampton and Portsmouth all made slightly fewer visits to greenspaces (115, 104 and 102 visits per annum respectively).

• 1379 interviewees (70%) had visited the New Forest woodland and heathland in the previous 12 months.

• 84% of interviewees in the closer (5km) distance band had visited the New Forest woodland and heathland in the previous 12 months; the percentage declined in successive distance bands to 54% beyond 15km.

• There was evidence that those who lived in flats, the more elderly (65+) and social grades C2, D and E (i.e. working class or non-working people including pensioners) were less likely to have visited the New Forest in the past year.

• Across all interviewees, the average number of visits to the New Forest woodland heathland was around 48 per year (this includes those who don't visit the New Forest at all, the average for those that do visit the New Forest was 72 visits per annum). For all those living within 0-5km (i.e. including those living within the New Forest) we estimated residents make an average of 122 visits to the New Forest woodland and heathland, this tailing off with distance to 18 visits per annum within the 20-25km band.

**For those 1,397 interviewees (70% of total) who had visited the New Forest in the past year:**

• 20% had stayed overnight in at least one of their visits to the New Forest

• Walking was by far the most commonly cited activity, (60%); other commonly cited activities included dog walking (19%) and enjoying the view/picnic (4%).

• Walkers tended to visit less frequently than other users. Taking into account the frequency of visit and using this to scale up the number of visits would suggest that around 47% of visits (from those living within 25km) are walking, 37% are dog walking and no other activity accounts for more than 5% of visits.

• Dog walking was particularly associated with the nearer distance bands (25% of interviewees from the 0-5km band cited dog walking as their main activity). Main activities that featured more among those living in the 20-25km band included camping (including campervans and caravans) (6%); bird/wildlife watching (4%), and going for a drive/motorbike ride (4%).

• A very wide range of locations were visited within the New Forest woodland and heathland; Lyndhurst was the most popular named destination, followed by Burley, Brockenhurst and Lymington.

• It was clear that sites such as Moors Valley Country Park and Avon Heath were thought to be part of the New Forest woodland and heathland by many interviewees, indicating that some local residents were not clear what the geographic bounds of the 'New Forest' are.

• 93% indicated they had travelled by car; other modes of transport included on-foot (8%), by bicycle (5%), train (2%) and bus (1%).

• The most common length of visit to the New Forest woodland and heathland was 4 hours+ (27%); also commonly cited were 1-2 hours and 2-3 hours (both 26%). Those visiting from the nearer distance bands (particularly 0-5km) tended to visit for shorter time periods. Dog walking was notable compared to other activities in that dog walkers tended to make shorter visits, with 41% of dog walkers visiting for 1-2 hours.

• Those living within 5km of the New Forest SPA/SAC/Ramsar showed a particularly strong affinity to the New Forest, (62% indicating that at least 75% of greenspace visits were to New Forest woodland and heathland). Across all distance bands 22% of interviewees indicated that at least 75% of greenspace visits were to New Forest woodland and heathland.

• Some 312 locations were named as other, alternative locations (beside the New Forest woodland and heathland) visited by interviewees. 230 of the 1,397 interviewees indicated they visited the coast as an alternative to the New Forest. Country Parks were among the most frequently named locations (albeit with relatively low levels of use), notably Royal Victoria Country Park was the most commonly named alternative location (54 interviewees), and Moors Valley Country Park (43 interviewees) and Queen Elizabeth Country Park (27 interviewees). Alternative destinations also included a wide range of other National Parks (11 other National Parks specifically named).

**For those 603 interviewees (30% of overall total) who had not visited the New Forest in the past year:**

• 67% had visited the New Forest at some time (just not in the past year)

• Key reasons for not visiting included lack of time or too busy (20%), too old/infirm (18%) and too far away (17%). Too far away was cited by as a reason for 2% of those that didn't visit in the 0-5km band, rising to 27% in the 20-25km band.

• The most commonly named greenspace sites visited were the Royal Victoria Country Park (22 interviewees, 4% of the 603 interviewees), Poole Park (18 interviewees, 3%), Queen

Elizabeth Country Park (15 interviewees, 2%), Upton Country Park (15 interviewees, 2%) and Bournemouth (15 interviewees, 2%).

• Main activities undertaken when visiting greenspace sites were walking (46%), dog walking (14%), enjoying the view/picnic (6%), and visiting the café/pub (3%). The are similar responses to those given by interviewees that visited the New Forest woodland and heathland, the key difference relates to the overall percentages, which are lower for those people who had not visited the New Forest in the past year. This would suggest that this group undertakes similar activities but overall potentially use greenspaces less frequently.

• Modes of transport used to access greenspace sites included car (59%), foot (25%), bus (6%) and bicycle (3%). Compared to those interviewees who visited the New Forest in the past year, a relatively high proportion travelled on foot.

**Views on new green infrastructure (asked of all 2,000 interviewees):**

Interviewees were asked to score three different options for green infrastructure improvements: 1) A large new country park with marked trails, a visitor centre, parking and other facilities – located somewhere around the periphery of the New Forest, 2) new smaller parks or small areas of open greenspace local to their home, and 3) improved footpaths, bridleways, cycle routes close to their home.

• In general, there was a greater level of interest in new small parks or improved footpaths close to home compared to a large new country park around the periphery of the New Forest.

• Those who had visited the New Forest in the past year were typically a little more positive about each option. For example, 67% of those who had visited the New Forest indicated they would be interested in seeing more local footpaths and better links compared to 55% of those who hadn't visited the New Forest in the past year.

• There was little evidence of a clear pattern across distance bands for any of the options, suggesting those that live nearby do not particularly favour different approaches to those living further away. The scores for a large single country park tended to be a little more positive for those living further away from the New Forest, particularly those interviewees in the 10-15 and 15-20km bands, whereas those living in the 0-5km band were particularly negative about this option.

• Comparing scores across the three options, there was a significantly higher proportion of interviewees than expected that did not score any one option higher than another, suggesting all approaches potentially have merit;

• Of those that did show a clear preference, smaller parks were the most common preference (18% of all interviewees);

• There were slight differences between walkers and dog walkers in that a higher proportion of dog walkers to walkers preferred a single country park while a higher proportion of walkers preferred improved footpaths and links.

## Vehicle Counts

• An average of 4% of the parking locations surveyed were closed/ inaccessible overall, with a high count of 11% closed during mid-March;

• A total of 17,182 vehicles were counted from all locations across the entire survey period, with an overall mean count per survey date of 1,146 vehicles and a median of 1,006 vehicles;

• An exceptionally high count of 2,908 vehicles was made across the entire survey area on Easter bank holiday Sunday (during a period of unseasonably warm weather), with a low count of 370 vehicles made in mid-March;

• Formal car parks contained the largest proportion of the vehicles counted, overall mean of 92%, with laybys accounting for 6%, and gateways/start of tracks accounting for 2%;

• The largest individual parking location totals were made from Queens (573 vehicles across the 15 transects), Blackwater (565 vehicles), Wilverley Plain (454 vehicles) and Bolderwood (453 vehicles) formal car parks;

• The smallest individual counts within formal car parks were made from Godshill Pit (4 vehicles) and Darkwater (7 vehicles);

• Cars comprised more than 85% (14,948) of the total number of vehicles counted, with vans comprising 6% (880), and camper vans 4% (578);

• Even on the exceptionally busy Easter Sunday count, the total number of vehicles across all surveyed parking locations was only 60% of the potential parking capacity available;

• Parking locations in proximity to urban areas, such as the towns and villages of Brockenhurst and Lyndhurst, and urban areas around the periphery were usually filled closer to capacity than those located elsewhere;

• Despite there being a broadly similar number of formal (147) to informal (123) parking locations, for large swathes in the core of the Forest the nearest parking location is often a formal car park;

• More vehicles were counted during the spring and summer months than during the autumn and winter, and weekends were busier than weekdays;

• More vehicles were counted on weekdays during the school holidays than during term time, and more cars were counted during the morning than in the afternoon;

• There were fewer vehicles on the days where there was rainfall (although few rainy days were surveyed).

• There were indications that a significant minority of vehicles were parked away from formal parking locations included in our counts. On some transects the vehicles parked on verges and other unmapped locations were counted (as a check rather than any systematic count) and these averaged an additional 7% of vehicles. The driving routes did not include every road and so this is a very indicative figure.