

Local Sustainable Transport Fund

Visitor Travel Case Study

Final Report



Produced by Cumbria Tourism in association with:

- Lake District National Park Authority
- New Forest National Park Authority
- South Downs National Park Authority

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Contents

		Page
1	Executive Summary	2
2	Introduction	6
2.1	Context and purpose	6
2.2	Why focussing on visitors is important	9
2.3	The three national parks and the LSTF programmes	10
3	The Monitoring Programme	14
3.1	Project Monitoring	14
3.2	Visitor Surveys	15
3.3	Business Surveys	17
3.4	Sustainable Transport User Surveys	19
3.5	Mosaic Segmentation	20
4	Findings	21
4.1	Introduction to the five themes	21
4.2	Visitor Bus Services	22
4.3	Cycling	25
4.4	Pay-as-you-drive cars	29
4.5	Hubs and parking	31
4.6	Marketing and branding	35
4.7	Mosaic Segmentation Analysis	41
5	Lessons and Discussion	47
5.1	Introduction to Lessons and Discussion	47
5.2	Relationships with local businesses	47
5.3	Motivations to use sustainable transport	48
5.4	Marketing and Branding	49
5.5	Programme Delivery	50
5.6	Realisation of Aims	51
5.7	Financial Sustainability	54
5.8	Behaviour Change	54
5.9	Planning for the Future	55
ANNEX A	Project Monitoring Report	57
ANNEX B	Business Survey Analysis	73
ANNEX C	Sustainable Transport User Analysis	102
ANNEX D	Mosaic Segmentation Analysis	144

1. Executive Summary

Background

The Local Sustainable Transport Fund¹ (LSTF) supported investment in 96 local sustainable transport programmes between July 2011 and March 2015.

The LSTF invested in programmes that were designed to meet two core policy objectives:

- To support the local economy and facilitate economic growth, for example by reducing congestion, improving the reliability and predictability of journey times, or enhancing access to employment and other essential services; and
- To reduce carbon emissions, for example by bringing about an increase in the volume and proportion of journeys made by low carbon sustainable modes including walking and cycling.

This case study examines two LSTF programmes within three national parks which seek to address the issues arising from car-borne visitor travel through the implementation of sustainable transport schemes. These sustainable transport schemes aim to preserve and enhance the economic viability of the national parks and decrease carbon emissions.

The case study outlines the interventions that were implemented across the visitor areas and examines their potential impact on visitor travel behaviour. Lessons are also drawn on the implementation and delivery of LSTF funded measures across the visitor areas studied.

The study documents what outputs have been delivered in the national parks and presents an overview of how the various activities have been used to meet the Fund's objectives. The study examines how the fund has been spread across the different modes of travel and provides insights about the performance of the key outputs and how these are helping to influence visitor travel behaviour. The study is not a full impacts or outcomes analysis or a comprehensive assessment of the scales of carbon reduction and economic benefit that can be attributed to specific interventions.

The case study explores a range of monitoring and survey data to provide insights into the following research questions:

1. Have the programmes delivered their objectives?
2. How have the programmes had an economic impact?
3. Which initiatives and interventions are most effective?

The Lake District, South Downs and New Forest are three of the ten national parks in England designated under the National Parks and Access to the Countryside Act 1949. The three national parks are world class, iconic landscapes, generating a combined total of over 60 million visitor days per year; most visitors use the private car as the preferred means of travelling to and around the parks.

Transport authorities covering each of the national parks submitted applications to the Department for Transport (DfT) LSTF which secured funding to progress a range of sustainable transport initiatives to increase economic growth and reduce carbon. The Lake District LSTF programme, led by Cumbria County Council, secured £4.9m through tranche one of the LSTF, with implementation of activity between 2011 and 2015. The New Forest and South Downs collaborated on a joint submission, led by Hampshire County Council, and secured £3.85m in tranche two of the LSTF, with implementation between 2012 and 2015.

¹ www.gov.uk/government/collections/local-sustainable-transport-fund

Notably, the Lake District LSTF programme chose to focus on a subset of the wider national park, defining the central and southern Lake District as a visitor travel 'beacon area', due to its popularity with visitors and the opportunities for providing high quality alternatives to the private car. The New Forest and South Downs programme focussed on the whole of both parks.

Both programmes were designed to offer the best opportunity to change visitor travel behaviour based on a geography, product and visitor demographic. Whilst programme content varied based on a local circumstance, both programmes were consistent in their investment in visitor bus services, marketing and branding and maximising the potential of rail stations as hubs. Across all parks the target audience was day and staying visitors, but with benefits to residents also offered by many of the interventions.

The main period for assessment of impacts was 2013 to 2015, enabling meaningful analysis between LSTF funded activity and baseline data prior to bid submission. However, it is worth noting that research activity was restricted to the financial years of 2013/14 and 2014/15, during delivery of programmes, rather than on, or post-completion.

Monitoring

Together, the *Lake District Visitor Transport Beacon Area* and *Two National Parks* programmes formed an LSTF Monitoring and Evaluation Visitor Travel Case Study, coordinated through Cumbria Tourism. The case study was designed to understand the extent to which expected LSTF outcomes had materialised, the effectiveness of different delivery approaches and the extent to which the scale of impact varied across local contexts.

The key data sources for the case study were:

- **Project Monitoring:** compilation of annual datasets relating to fixed indicators such as traffic counts, number of visitor bus passenger journeys, cycle counts, as well as bespoke indicators such as number of bikes hired, number of bikes carried on waterbuses, and number of miles driven in pay-as-you-drive cars.
- **Visitor Surveys:** individual visitor data collected at key sites across each of the three parks, to monitor year-on-year changes in the ratio of car to public transport visits, as well as the desirability of travelling sustainably, and the effectiveness of campaign messages.
- **Business Surveys:** A one off survey conducted at the end of the 2014 visitor season to gather qualitative and quantitative data from 300 business within the programme areas, using a mix of businesses which had been engaged with the LSTF programmes, and those which hadn't.
- **Sustainable Transport User Surveys:** Annual surveys in each park involving those visitors with direct experience of using project initiatives e.g. who had hired bikes or used visitor bus services.
- **Mosaic Segmentation Analysis²:** Annual geodemographic segmentation of visitors undertaken through the analysis of postcode data set out in four key visitor surveys.

Summary of Findings

The case study considered evidence from across all three national parks. Findings were grouped into five key themes to provide focus and consistency in reporting; a summary of the key findings against each theme is set out below with more detail in section four of this report:

² www.experian.co.uk/marketing-services/products/mosaic-uk.html

- **Visitor Bus Services:** The overall trend for visitor bus journeys in LSTF areas increased by 3.7% between 2012 and 2014 (555,715 journeys in 2012 and 576,068 journeys in 2014). Rates of increase have been mixed, with the largest observed increase to service levels nearly three times greater than at baseline (from 860 journeys in 2012 to 2,375 journeys in 2014) and the greatest decrease in service at -9.4% (from 89,141 journeys in 2012 to 80,763 journeys in 2014).
- **Cycling:** Significant growth in the South Downs, with an average 93% increase between 2012 and 2014 at cycle counter locations (2,326 counts in 2012 and 4,485 counts in 2014), compared to a 24% growth in the New Forest between 2012 and 2014 (395 counts in 2012 and 491 counts in 2014). The Lake District demonstrated a 30.7% increase in the number of cycles carried on the Windermere Bike Boat between 2013 and 2014 (1,164 cycles in 2013 and 1,521 cycles in 2014).
- **Pay-as-you-drive Cars:** This Lake District only initiative experienced challenges and after a positive 2013, popularity declined in 2014 (a 38% decrease overall from 9,463 miles in 2012 to 5,851 miles in 2014).
- **Hubs and Parking:** The number of train passengers accessing the parks via the rail network, overall increased by 2.8% (station entries and exits 19.81 million in 2012 and 20.37 million in 2014), ranging from a decrease of -1.8% in the New Forest (station entries and exits 2.41 million in 2012 to 2.37 million in 2014) and increase of 5.7% in the Lake District (station entries and exits 1.04 million in 2012 to 1.10 million in 2014). Slight overall increases in vehicle traffic were evidenced over the project period, but are likely to reflect wider economic and social activity rather than a consequence of the LSTF interventions.

Marketing and Branding: Each park adopted a different approach to marketing with positive results across the board. The Lake District and South Downs developed new consumer facing brands whereas the New Forest chose to work with and through existing brands. While increases in the take up of sustainable travel options is consistent across the three parks, the extent to which this is attributable to tourism journeys rather than any others, and the extent to which they may have been directly influenced by the LSTF projects, is relatively unknown.

There were changes in the tourism sector and the wider economy during the reporting period which will also have a bearing on results. In particular, good summer weather during 2013 and 2014 boosted visitor numbers (2013 visitor numbers increased in the Lake District by 4.5% on 2012, and the New Forest achieved a 0.6% increase during that time). At the same time, there were improvements to the wider economy and a corresponding impact on household finances and disposable incomes and spending. Consumer Confidence in the United Kingdom as reported by GfK NOP (UK) rose from a low of -29 in January 2012 to -4 at the end of 2014, and gross domestic product as reported by the Office for National Statistics (ONS) grew by 0.7% in 2012, 1.7% in 2013, and 2.6% in 2014.

Assessment of Success

The case study provides some indicative data to measure the impact of LSTF in different tourism contexts; an area where there is very little existing evidence. Implementation has also contributed to local policy objectives contained within National Park Management Plans, Local Transport Plans and Strategic Economic Plans.

There are aspects of the LSTF visitor programmes that make monitoring and evaluation challenging. The programmes consist of a number of small scale interventions with a range of objectives which have been implemented over diverse areas at different points in time. Attributing behaviour change from the results of interventions is therefore difficult. A key challenge with the case study lay in disaggregating the intervention effects from background variables and designing fieldwork which could deliver a robust sample (given the modest

scope of the study a counterfactual was not available and the fieldwork focused exclusively on convenience samples and hence there will be limits to generalising the results to other areas).

The survey and monitoring data indicate that the LSTF may have contributed to some changes in the intended direction although the magnitude of change has been inconsistent across the case study areas and will reflect differences in other contextual factors. Therefore, it is not possible to say whether, or to what extent, changes indicated are attributable to the LSTF.

There are indications from monitoring data on the effectiveness of some LSTF initiatives. In all visitor areas LSTF investment was used to introduce new or extend existing bus services and in the Lake District this activity also took place alongside infrastructure improvements. Measures from the project monitoring suggested that bus services in receipt of LSTF funding showed positive increases in the number of journeys made compared to non-funded services. The New Forest and South Downs programmes invested in improving cycling routes and the Lake District focused on enhancements to the local cycle network and increasing availability of cycle hire. The monitoring data also indicated that an increase in cycling levels had been demonstrated in all visitor areas studied. All visitor areas undertook initiatives to encourage rail use and there were modest increases to the number of train passengers on the rail network in the LSTF areas, however changes in patronage levels reflect all passengers and not just visitors.

The evaluation of the economic impacts of LSTF is complex and it was beyond the scope of the study to measure the direct employment impacts generated by the interventions or their impact on business cost savings or retail activity. The study provides some monitoring data on traffic flows but does not provide any indicative evidence of immediate decongestion benefits in the visitor areas examined. The study design is not able to show the direct effects of LSTF on carbon emissions however self-report data from the user surveys indicated modest decreases in estimated car use across the visitor areas however these differences could be explained by sampling variations over the period studied.

Section five of the report presents a discussion of lessons learned during the implementation of the programmes, including:

- **Relationships with local businesses:** Creating links with local stakeholders and businesses to help promote and increase sustainable travel was a valuable technique employed by all three parks. The Business Survey showed, in the Lake District, accommodation providers in the area acted as agents to help promote and arrange pay as you drive initiatives. In addition, accommodation centres and shop fronts were important for all parks in helping to increase cycling, often acting as locations where bikes could be rented or, in the case of electric bikes (e-bikes), charged. Relationships with other transport stakeholders, such as railway stations and local authorities, also proved important in terms of getting support to locate cycle hubs at key locations and securing parking spaces to support pay as you drive schemes. The marketing schemes deployed across the parks also relied heavily on the cooperation of local attractions, accommodation providers and tourist information sources to help raise brand awareness and promote sustainable travel.
- **Motivations to use sustainable transport:** when considering survey responses from the Sustainable Travel User Survey in relation to cycling, the health benefits (63%) and the opportunity to enhance the travel experience (62%) were cited as the main reasons for using the mode. There are perhaps more opportunities which can be taken to link the promotion of active travel in national parks to the local public health agenda, given that

48% of survey respondents said they would be encouraged to use forms of transport that were better for their health. However, one limitation that was recognised through surveys was, despite measures to improve cycle infrastructure around the parks, safety is still a significant concern for visitors, particularly those traveling with children.

- **Marketing and branding:** Generating recognition for a brand outside of the local area was highlighted as a challenge, because of the huge geography that the parks draw visitors from. In the New Forest, 68% of visitors saw information about sustainable travel during their visit compared to only 33% beforehand. If the brand needs to reach visitors before they arrive alternative promotional techniques might be required, such as greater focus on ensuring information meets potential/planned visitors in advance of their journeys. It is also important to consider working with and through existing brands to reach visitors who are already planning to travel to the National Parks, for example, destination and accommodation websites, train operating companies and working with attractions who are already bringing visitors to the area and providing them with information before they do so.
- **Programme Delivery:** National parks are unique and special places which generate a huge amount of passion and interest from local residents and visitors from across the UK and beyond. This can lead to heightened interest in schemes, particularly of a capital nature and the potential impact they may have on the landscape (positive and negative). It has been much easier to deliver innovative revenue funded schemes in national parks and achieve results. Programme delivery on the basis of standard financial years does present challenges for delivering revenue schemes, when the majority of activity will be delivered in quarter one and quarter two to coincide with the peak visitor season.
- **Financial Sustainability:** Original LSTF guidance from DfT placed emphasis on ensuring financial sustainability of measures developed through the programme. Methods by which the programmes have demonstrated financial sustainability include:
 - Embedding new ways of working into business models of delivery partners;
 - Reacting to wider reductions in bus service subsidy;
 - Encouraging the private sector to innovate, invest and deliver key messages to visitors e.g. commercial sponsorship of sustainable transport products.

Planning for the future: The programmes have focused on providing incentives to deliver travel behaviour change rather than creating forced change which can 'lock in' changes in traffic reduction. The scale of change in traffic count data to date is therefore relatively small. To secure this change for the future, consideration should be given to additional demand management measures in national parks to disincentivise the use of cars to travel to and around destinations. This will require bold leadership from multiple organisations, political support at a local and national level, and funding to implement this. It is doubtful that this support is in place, but there is no doubt that the volume of investment has raised the profile of sustainable travel in the areas invested in to date.

2. Introduction

2.1 Context and Purpose

In 2011, the Government published its Local Transport White Paper *Creating Growth, Cutting Carbon*³, which recognised the positive contribution that local sustainable transport interventions could make to supporting economic growth and carbon reduction.

The white paper acknowledged that two-thirds of all journeys are under five miles, and that many of these trips could be easily cycled, walked or undertaken by public transport. It went on to recognise that a substantial proportion of drivers would be willing to drive less, particularly for shorter trips, if practical alternatives were available and marketed effectively.

As part of the white paper, the Government announced the creation of the Local Sustainable Transport Fund (LSTF), a £560m funding programme which represented a stage in the Government's move away from specific grants to provide local authorities the freedom to develop targeted transport packages that address the particular transport problems in their areas.

The purpose of the LSTF was to enable the delivery by local transport authorities of sustainable transport solutions that support economic growth while reducing carbon. These solutions would be geared to supporting jobs and business through effectively tackling the problems of congestion, improving the reliability and predictability of journey times, enabling economic investment and enhancing access to employment. They would at the same time bring about changing patterns of travel behaviour and greater use of more sustainable transport modes and so deliver a reduction in carbon and other harmful emissions. The LSTF also provided the opportunity to take an integrated approach to meeting local challenges and to delivering additional wider social, environmental, health and safety benefits for local communities.

The LSTF also presented an opportunity for authorities to capture the benefits arising from previous demonstration projects and identify how those benefits could be realised in their own particular areas. Previous demonstration projects of relevance included:

- Sustainable Travel Towns⁴ (2004 to 2009)
- Cycling City and Towns Programme⁵ (2005 to 2008)
- Finding New Solutions⁶ (2009 – 2011)

It was partly as a result of recommendations arising from the above programmes that the DfT enabled applications covering national parks to be eligible for the LSTF competition. Applications relating to National Parks could be taken forward by a single local transport authority or as a joint application in cases where national parks span more than one local authority. In all cases, bids were led by the relevant local transport authority and endorsed and delivered in partnership with the relevant National Park Authority.

Between 2011 and 2012, over 70 applications were approved for LSTF funding, but only a small number focused on visitor travel in visitor destinations and/or national parks. In total

³ www.gov.uk/government/publications/creating-growth-cutting-carbon-making-sustainable-local-transport-happen

⁴ www.gov.uk/government/uploads/system/uploads/attachment_data/file/4410/chap3.pdf

⁵ www.gov.uk/government/publications/evaluation-of-the-cycling-city-and-towns-programme

⁶ www.visitengland.com/sites/default/files/downloads/3_finding_new_solutions_leisure_cycling_programme_-_summary_report_tcm30-33248_0.pdf

eight of the ten national parks were covered by applications for visitor focussed LSTF applications. Of these, applications were approved covering the following parks:

- New Forest/South Downs
- Lake District
- North York Moors

These LSTF programmes provide the first major opportunity to understand how visitor transport and travel contributes to the rural economy, and learn how best to change visitor travel behaviour to maximise carbon reduction.

This case study concentrates on three national parks with LSTF programmes: The Lake District, New Forest and South Downs. These are popular visitor destinations that have a significant potential for modal shift, and visitors spend is a key contributor to the vibrant local economies of the parks. However, the visitors to the parks also generate large amounts of car traffic that increasingly compromises the visitor experience and many of the special qualities that draw both residents and visitors to the three national parks in the first place. Air and water pollution levels rise; habitats and landscape character are threatened by vehicle encroachment; tranquillity is broken by traffic noise; and the wider impacts of transport emissions and their contribution to climate change are already being seen in changing ecosystems, migration patterns and other critical aspects of species and habitat survival.

The **Sustainable Visitor Transport Beacon Area** (Lake District) and **Two National Parks** (New Forest and South Downs) LSTF programmes both seek to address the problems of car-borne visitor travel through the implementation of a series of innovative schemes that preserve and enhance the economic viability of the national parks while reducing the negative impact of visitor travel.

This is a case study to document the performance of the outputs of the overall visitor-focussed LSTF programmes across the three national parks, it is not a full impacts or outcomes analysis or a comprehensive assessment of the scales of carbon reduction and economic benefit disaggregated explicitly back to specific interventions. The study documents what outputs have been delivered in the national parks and presents insights into how the various activities have contributed to meeting the Fund's objectives.

Specifically, the study reports the extent available data can provide insights into the following research questions:

Have the programmes delivered their objectives?

The case study gathers evidence of the following:

- increasing the opportunities for visitors to get to the project areas in a sustainable way;
- increasing the opportunities for visitors to get around the project areas in a sustainable way;
- reducing the proportion of visitors arriving by car;
- reducing the impact of travel (by reducing private car use), especially in terms of reducing carbon emissions, and impact on the local environment;
- doing this in ways that help to make the visitor experience more enjoyable.

How have the programmes had an economic impact?

The case study provides indicative evidence of business benefits, and how these can be packaged so that businesses are more likely to actively engage in transport and travel delivery. By considering changes in the visitor economy, as well as talking directly to businesses and visitors about behavioural, economic, and perception changes, the case study provides information on the potential impact the projects and individual themes have on tourists, tourism businesses and the visitor economy as a whole.

The LSTF programmes shared a common economic objective to safeguard and support tourism-related employment; and provide wider economic benefits.

Economic indicators include:

- new business start-ups, and businesses supported;
- changes in job numbers;
- changes in tourist numbers;
- changes in visitor spend patterns.

Which initiatives are most effective?

This case study examines the available monitoring and survey data and presents insights into how the various activities have contributed to meeting the Fund's objectives.

The investigations consider:

- reduced congestion - both actual and perceived;
- visitor awareness of sustainable travel options;
- visitor propensity to use sustainable travel options;
- types of behavioural change, their triggers and perception change;
- the most effective ways of engaging businesses and achieving buy-in from them.

2.2 Why Focusing on Visitors is Important

The Lake District, New Forest and South Downs National Parks are three popular areas in terms of tourism and visitor numbers, and have the potential to show evidence for the importance of influencing visitor travel behaviour. The businesses and residents within tourism areas depend on day and staying visitors to support a thriving rural economy. However, the visitors to these areas also traditionally generate large amounts of car traffic that increasingly compromises both the visitor experience and the environment and, in the longer term, the economic wellbeing of the area. For the long term sustainability of the rural visitor economy, it is important to reduce the reliance of visitors on the private car to get to and around these destinations.

Protected landscapes are well placed to host projects which assess visitor travel behaviours. Visitors may be more amenable to change their normal behaviour when out of their everyday environment, and potentially more likely to switch to sustainable modes from private car use. Destinations can be clever in their creation and marketing of the alternatives by making transport part of the visitor experience rather than a necessary journey; almost half (49%) of visitors surveyed cited enjoyment as motivation for using sustainable transport. This can be

through experiences such as enhanced bus services, cycling and walking. Poor public transport and a lack of safe walking/cycling routes is detrimental to the residents of National Parks as well as to visitors. Visitor use and spend on local transport can create additional benefits for residents. This is the case for subsidised bus services: if highly used by paying visitors, it makes them more sustainable for continued resident use and reduces the pressure on the local authority bus subsidy.

Evidence to support this was identified through the Cycling England *Finding New Solutions*⁷ programme, which set out to identify to what extent a positive leisure cycling experience, accompanied by follow-up support and interventions, lead to more habitual cycling. The programme identified that 38% of non-cyclists being introduced to cycling through a leisure experience reported a sustained increase in their cycling in follow up surveys, defining them as regular or occasional cyclists.

National parks are often referred to as 'test beds'⁸ for sustainable development. DEFRA previously envisaged that by 2030, England's national parks will be places where sustainable development can be seen in action. The communities of the parks take an active part in decisions about their future. They are known for having been pivotal in the transformation to a low carbon society and sustainable living. Renewable energy, sustainable agriculture, low carbon transport and travel and healthy prosperous communities have long been the norm⁹.

However, focussing on visitors also creates some difficulties in overcoming access to sustainable transport. Visitors tend to 'chain' their trips by visiting a number of sites in one day for a variety of reasons. This means that interventions cannot focus on one type of trip purpose, but must address all barriers to sustainable travel and provide innovative solutions.

For each of the three national parks, the importance of the work of LSTF through sustainable transport initiatives, reducing carbon emissions and a thriving rural sustainable economy (including tourism) are inherently linked and emphasised in their respective management plans and other policy documents.

2.3 The Three National Parks and the LSTF Programmes

The three national parks offer contrasting characteristics which enable the interventions to be tested in wide ranging environmental, social and economic geographies. The New Forest and South Downs National Parks are two of England's newer national parks with designation in 2005 and 2010 respectively, by contrast the Lake District was one of the first national parks to be designated under the National Parks and Access to the Countryside Act (1949). The Lake District receives the largest volume of visitors of all the UK's national parks, and generates the most visitor spend (nearly twice as much as the second placed national park, the Broads). The New Forest is England's smallest national park, but receives more visitors per sq/km than any other¹⁰. The South Downs has the highest residential population of all of England's national parks, and receives the highest amount of day visitors per annum¹¹.

7

http://www.visitengland.org/Images/3%20Finding%20New%20Solutions%20Leisure%20Cycling%20Programme%20-%20Summary%20Report_tcm30-33248.pdf

⁸ Review of English National Park Authorities, DEFRA, 2002

⁹ English National Parks and the Broads: UK Government Vision and Circular, 2010, Defra

¹⁰ New Forest Visitor Survey 2005

¹¹ Tourism South East (2013) South Downs Visitor & Tourism Economic Impact Study

All three parks are administered by National Park Authorities, which operate in a similar way to local authorities, but with appointed, rather than elected members, and funding from central government (DEFRA), rather than locally raised taxation.

New Forest National Park

The New Forest is a lowland national park characterised by open heathland, ancient woodland and free-roaming stock animals. The park generates over 13.5 million visitor days per year, contributing £123m to the local economy. Some 600 tourism-related businesses are located within the park, providing employment for around 2,500 (29% of all employment). 96% of staying visitors, 94% of non-local day visitors and 88% of local visitors arrive by private car¹². 56% of all transport CO₂ emissions in the New Forest National Park are attributed to visitor travel to and around the park by car, with 31% from residents¹³.

South Downs National Park

The South Downs generates over 46 million visitor days a year and tourism provides employment for over 5,000 jobs in the National Park (25% of all employment within the Park), and 2,000 in the close surrounding area, contributing around £464 million to the national park economy each year. 72% of staying visitors¹⁴ and 84% of day visitors arrive by car. 57% of transport CO₂ emissions in the South Downs National Park are due to visitors travelling to and around the National Park, compared to 30% for residents' car travel¹⁵.

The New Forest and South Downs National Parks LSTF Programme

The New Forest and South Downs National Parks Programme (The Two National Parks Programme) is a £3.85 million initiative to transform the way that visitors travel to and around the New Forest and South Downs National Parks. The main objectives are:

- Improving key public transport gateways into the two National Parks
- Making it easy to reach attractions within the two National Parks
- Promoting sustainable travel packages to visitors before they arrive and while they are in the national parks, and
- Manage traffic effectively within the parks, so that it does not detract from the visitors' experience.

The package aims to support the local economy and reduce carbon emissions by significantly improving access to and within both parks, through targeting visitors and encouraging them to travel by sustainable modes. Through cross-border working and collective action across authority boundaries, the package aims to enable sustainable access and movements around the parks, helping to support more tourism-related employment and reducing carbon emissions.

Projects include:

- Making it easier to combine travel by train and foot and bike.
- Creating a seamless transfer from train to bus.
- Providing new bus routes and services.
- Making public transport services easy to understand and use.

¹² New Forest Visitor Survey, 2005

¹³ p.14, Sustainable Transport Solutions for England's two newest National Parks, 2012

¹⁴ Tourism South East (2013) South Downs Visitor and Tourism Economic Impact Study

¹⁵ p.14, Sustainable Transport Solutions for England's two newest National Parks, 2012

- Improve the quality of cycling and walking routes.
- Provide wider access to bicycles.

The Programme is being delivered with Hampshire County Council as the accountable body. Partners include East Sussex County Council, Brighton and Hove City Council, West Sussex County Council, Wiltshire Council, the New Forest National Park Authority and the South Downs National Park Authority. Individual project managers are based at the New Forest and South Downs National Park Authorities. The programme structure uses existing established reporting structures combined with a new LSTF Programme Board which oversees the management of the programme.

Lake District

The Lake District National Park is located in the North West of England and is the largest national park in England covering a total of 885 square miles.

The economy of the Lake District National Park is heavily dependent on its 15.5 million visitor days¹⁶ and tourism provides over 15,000 FTE jobs within the National Park with visitors contributing £952.7 million to the economy every year. Visitors also create some significant environmental impacts with 87% of visitors arriving by car, resulting in emissions of 322,000 tonnes CO₂e from driving *to* the Lake District and 205,000 tonnes CO₂e from car travel *around* the Lake District, compared to the 165,000 tonnes CO₂e from personal car travel by residents¹⁷. During peak periods, traffic can cause congestion, delays to bus services on some routes, and problems with parking 'overspill' into inappropriate areas such as roadside verges.

The Lake District LSTF programme is a £4.9 million initiative to transform how visitors get to and travel around central and southern Lake District. The aim of the Programme is to generate a step-change in how visitors travel to and around the Central and Southern Lake District by enabling more opportunities for visitors to benefit from sustainable modes of travel. The primary aim is to reduce private car use through the delivery of attractive and viable travel alternatives, and in order to create a more enjoyable and relaxing visitor experience. The Programme seeks to reduce the impact of visitor travel on the local environment and communities and help make visitors' trips to the area more enjoyable and relaxing. Projects include:

- Improving passenger transport.
- Improving traffic management
- Car hire network.
- Smart ticketing.
- Improving the cycle network.
- Improving access to cycling.
- Transport information provision.
- Marketing travel *around* the Lake District.
- Marketing travel *to* the Lake District.

The Programme is delivered in partnership by Cumbria County Council, the Lake District National Park Authority and Cumbria Tourism. The programme was integrated into existing

¹⁶ STEAM, 2013, Cumbria Tourism

¹⁷ p.3, Lake District Sustainable Visitor Transport Beacon Area, 2011

management structures and sits within the Lake District Partnership, a collective of 23 public, private, community and voluntary sector organisations

3. The Monitoring Programme

The Case Study monitoring programme was designed to collect a range of evidence from across the three national park areas:

The rationale behind the data collection programme included:

- Supporting the key arguments as to why and how initiatives could lead to visitor travel behaviour change, carbon reduction, and economic benefit to the rural economy;
- Examining the evidence as to the impact of LSTF measures on visitor travel behaviour, carbon reduction, and economic benefit.

The monitoring programme comprised of the following activity:

- Project Monitoring
- Visitor Surveys/Travel Diaries
- Business Surveys
- Sustainable Transport User Surveys
- Mosaic Segmentation Analysis

Due to timing, there were limitations on the robustness of data collection – the case study did not commence until June 2013 at which point the visitor season was well underway. Research had to be started as quickly as possible and this meant that sampling times and locations were somewhat restricted.

3.1 Project Monitoring

The project monitoring programme developed a series of indicators to track activity within the project areas. Indicators were selected on the basis of their relevance and availability and where possible are consistent across the project areas.

Key indicators included:

- Bus service passenger journey numbers, using data from bus ticket machines
- Volume of cyclists, using fixed on and off road cycle counters
- Volume of vehicles, using fixed traffic counters
- Volume of rail passengers, using annual entries and exits from rail stations

For the indicators listed above, the project monitoring allowed for a broad high level overview of activity within the project areas. For some of these indicators it isn't possible to categorise the end user i.e. data may apply to a visitor, resident, business traveller etc. As such increases or decreases in activity cannot be robustly apportioned to LSTF interventions alone.

That said, some project monitoring indicators related specifically to LSTF funded interventions which did allow apportionment, these included:

- Number of meaningful engagements with the New Forest Travel concierge
- Number of car club members, and miles
- Beach Bus passenger journey numbers
- Volume of participants in Skyride events

Data were collected for the calendar years 2012, 2013 and 2014. However, not all indicators were available in 2012 and therefore for some indicators meaningful analysis can only be demonstrated between 2013 and 2014.

Tracking these indicators over time has made it possible to measure increased opportunities to get to and around project areas in a sustainable way, indicate which interventions have been most popular, and demonstrate the extent to which the expected LSTF outcome have materialised to date.

The full Project monitoring report is included at **ANNEX A**. (Note: commercially sensitive data has been redacted).

3.2 Visitor Surveys

Visitor surveys were carried out at key sites across each project area to measure visitor profile, trip features and visitor travel behaviour. Surveys were designed to be appropriate for each project area, and to take advantage of existing networks (and previous research studies), meaning that methodology and timings varied, but core questions were agreed by the project teams for comparability.

The survey sites were carefully chosen to reflect 'honeypot' locations (areas which attract large numbers of visitors) and maximise opportunities to encounter visitors travelling to and around the parks using a range of transportation modes.

Visitors included both local visitors living in settlements within the National Park and visitors travelling from further afield.

The approach taken by each of the parks is summarised below:

New Forest

Separate Visitor Surveys were conducted during 2013 and 2014. The aim of the visitor surveys was to monitor year-on-year changes in the ratio of car to public transport visits, as well as the desirability of travelling sustainably, and the effectiveness of campaign messages. For the 2013 Survey, four fieldwork researchers were used over two weeks, from Monday 26th August to Sunday 14th September and a total of 595 visitors were surveyed. An additional 14 visitors responded to an identical online survey, increasing the total of respondents to 609. The reported results are a combination of face to face and online responses.

The following year 500 people were surveyed from 3rd July to 14th September 2014. Again, the survey sites were carefully chosen to reflect 'honeypot' locations and maximise opportunities to encounter visitors travelling to and around the New Forest using a range of transport modes. Visitors included both local visitors living in settlements within the New Forest and visitors travelling from further afield. It should be noted that both cycles of the survey were based on convenience samples and not necessarily representative of the total population of visitors at these locations.

Table 1: Sample size and distribution of New Forest Visitor Survey 2013 and 2014

Location	2013		2014	
	Number	Proportion	Number	Proportion
Lyndhurst	137	22%	123	25%
Brockenhurst	163	27%	96	19%
Burley	193	32%	75	15%
Keyhaven	102	17%	75	15%
Online	14	2%	-	-
Buckler's Hard	-	-	50	10%
Lymington	-	-	50	10%
Ashurst	-	-	25	5%
Hythe	-	-	6	1%
Total	609	100%	500	100%

The interview schedule was designed to ensure that the survey captured visitors at different times of the day and over different days of the week to ensure that the sample represented a cross-section of visitors. The survey took place over a period which is well known to be the peak tourism season and this is reflected in the relatively high proportion of non-local visitors represented in the sample.

The survey methodology introduces some limitations in comparing the 2013 and 2014 data. The surveys were conducted at different times of the year and at different locations which restricts the comparison that can be made between the survey results.

South Downs

Extensive visitor research¹⁸ had been undertaken in the South Downs in 2012 (prior to this programme) and provided an appropriate baseline. Resource concentrated on collecting evidence during the 2014 visitor season.

Face-to-face surveys took place in the South Downs National Park with a convenience sample of 1,013 visitors at key sites across the South Downs between the 4 July and 26 September 2014. The interview sites were carefully chosen to reflect 'honeypot' locations and maximise opportunities to encounter visitors travelling to and around the South Downs using a range of transport modes. Visitors included both local visitors living in settlements within the National Park boundary and visitors travelling from further afield.

As in the New Forest, the South Downs used popular visitor locations as survey sites, which increased the likelihood of engaging with visitors using a range of transport modes to travel to and around the National Park. Furthermore, survey schedules were designed to guarantee that results would be collected at varying times of the day, and over different days of the week.

¹⁸ South Downs Visitor and Tourism Economic Impact Study, TSE Research, January 2013
www.southdowns.gov.uk/wp-content/uploads/2015/03/Visitor-Survey-2012.pdf

Table 2: Sample size and distribution of South Downs Visitor Survey 2014

Location	Number	Proportion
Queen Elizabeth Country Park	102	10%
Devil's Dyke	100	10%
Seven Sisters Country Park	100	10%
Lewes (town centre/high street)	96	9%
Alice Holt Forest Park	80	8%
Pulborough Brooks	80	8%
Midhurst	76	8%
Ditchling Beacon	75	7%
Beachy Head	74	7%
Alfriston	68	7%
Old Winchester Hill	67	7%
Harting Down	50	5%
Weald & Downland Museum	45	4%
Total	1013	100%

Lake District

The Lake District National Park visitor survey in 2014 built upon on a baseline survey carried out in 2011. It was designed in partnership with the University of Central Lancashire and Nurture Lakeland with the aim of improving the understanding of visitor travel behaviour in the GoLakes travel area. It highlighted the journeys that visitors made, as well as the transport modes used to make these journeys.

Day visitors were approached using face-to-face interviews, and Nurture Lakeland's accommodation network was used to distribute questionnaires to staying visitors. Surveys took the form of visitor travel diaries, noting their origin, destination, transport mode and group size. Responses from day visitors and staying visitors were recorded separately, and journeys undertaken on weekends were logged separately to those being undertaken during the week.

The results are based on data from approximately 1,000 visitor travel diaries, with a repeat sample and methodology used in both 2011 and 2014. Results have been extrapolated based on an assumption that the GoLakes Travel area contains approximately half of the total visitor numbers in the Lake District National Park area and as such are best estimates.

3.3 Business Surveys

A Business Survey was undertaken in October and November 2014 with two groups of businesses, those directly involved in the LSTF programmes (engaged businesses) such as tourism businesses, bus companies and bike hire providers; and secondly with other businesses located in the project area that have not had direct involvement (unengaged businesses).

A total of 300 businesses were interviewed by telephone. Participating businesses were made up of 131 businesses from the GoLakes (Lake District) area, 102 from the South Downs, and 67 from the New Forest. Significantly fewer interviews were conducted in the New Forest partly because there was a limited database of engaged businesses, related to a smaller geographical size. To compensate, a larger number were interviewed from the Lake District, so it may be over-represented in the results. The questionnaires were designed by Strategic

Marketing¹⁹ alongside the project team. The Business Survey sought to identify the views of business on a range of topics including:

- Business perceptions of sustainable transport interventions;
- Travel behaviour of customers, and to what extent this was influenced by LSTF interventions;
- The impact of LSTF interventions on various aspects of business performance, including economic benefit and job creation.

Table 3: Breakdown of businesses interviewed by national park

National Park	Engaged Business	Non-engaged Business	Total
Lake District	64	67	131
South Downs	61	41	102
New Forest	25	42	67
Total	150	150	300

Table 4: Breakdown of businesses interviewed by sector is shown below:

Sector	Engaged Businesses	Non-engaged Businesses	Total
Hotel or guesthouse	29	55	84
B&B	23	27	50
Self catering	9	11	20
Caravan park / campsite	7	13	20
Hostel	-	6	6
Attraction	41	29	70
Activity provider	10	9	19
TIC	5	-	5
Car hire	1	-	1
Bike hire	7	-	7
Bus company	4	-	4
Cafe or pub	7	-	7
Retailer	7	-	7
Total	150	150	300

The survey aimed to include as many transport businesses as possible due to their high level of engagement, but there were limited numbers available in the database so they may be under-represented as a result.

¹⁹ www.strategic-marketing.co.uk

Business Survey analysis is presented in full at **ANNEX B**.

3.4 Sustainable Transport User Surveys

A Sustainable Transport User Survey was conducted in all three project areas during the 2013 and 2014 visitor seasons. A paper version of this survey was professionally designed and printed as an A4, foldable, self-complete survey which could be sealed and returned by freepost direct to Cumbria Tourism. This was complemented by an online version which was widely advertised.

This research was aimed at visitors who had chosen to travel sustainably and as such had direct experience of using LSTF funded project initiatives e.g. consumers which had hired bikes or cars, or taken bus transport, or train travel.

The questionnaire was designed to track:

- visitor profiles
- awareness and perceptions of sustainable travel choices
- propensity to use sustainable travel options
- travel habits/changes
- triggers of behavioural change, and opportunities to maximise beneficial travel behavioural change
- spending patterns

As referenced previously, research did not get underway in 2013 until the middle of the visitor season. Both paper and online surveys were distributed between August and November in 2013, and from March to the end of November in 2014. Distribution was designed to maximise the number of participants, with printed surveys available on visitor bus services, at transport interchanges, and visitor information centres. Distribution of printed surveys was timed to coincide with the Easter holidays to increase response from visitors.

In 2013, a total of 435 paper surveys were completed, as well as 307 online surveys, which made a total of 741 completed surveys across the National Parks. In 2014, 843 paper surveys were completed and 580 were completed online, totalling 1,423 overall

Table 5: Number of completed Sustainable Transport User Surveys per national park.

National Park	2013		2014	
	Number of completed surveys	% of Total	Number of completed surveys	% of total
New Forest	186	25%	277	20%
South Downs	280	38%	156	11%
Lake District	355	36%	978	69%
Total	821		1,411	

These sample sizes are sufficient for robust analysis, although as distribution varied by National Park (taking advantage of most effective mechanisms), samples will not necessarily be fully representative of visitor markets across all transport modes, places, and times.

The Sustainable Transport User Survey analysis is presented at **Appendix C**.

3.5 Mosaic Segmentation Analysis

Mosaic is a method of consumer classification designed to understand the demographics, lifestyles, preferences and behaviours of the UK adult population. For each Mosaic segment, detailed information is available for a range of topics, including how consumers find out about new products, financial information, demographics and some travel behaviour information.

Mosaic allows the three project areas to understand more about their visitors, informing marketing activity in order to target particular groups by geography and demographic.

Mosaic analysis was undertaken for 2013 and 2014 using visitor postcode information contained within responses to the following surveys:

- Lake District Visitor Survey
- New Forest Visitor Surveys
- South Downs Visitor Surveys
- Sustainable Transport User Surveys

The analysis presented the top three Mosaic segments for each of the three project areas, and compared changes in segmentation over the implementation period.

The Mosaic Segmentation Analysis is presented at **ANNEX D**.

3.6 Stakeholders

Both LSTF Programmes were managed by the relevant highway authorities in partnership with the three national park authorities. A range of staff from each of the local authority staff was interviewed informally as part of this study, these include:

Two National Parks Programme

- Hampshire County Council (accountable body): LSTF Programme Manager
- New Forest National Park Authority: LSTF Project Manager
- South Downs National Park Authority: LSTF Project Manager

Lake District Visitor Transport Beacon Area Programme

- Cumbria County Council (accountable body): LSTF Programme Manager
- Lake District National Park Authority: Sustainable Transport Advisor

4 Findings

4.1 Introduction to the five themes

When comparing the impact of new sustainable travel interventions introduced across the National Parks, categorising approaches thematically will increase clarity and focus in terms of developing comparisons and conclusions. Further to this, the identification of five key themes will support the subsequent future application of lessons learned through this study and the development of best practice in terms of sustainable travel initiatives.

The two LSTF programmes, encompassing actions across the three national parks, each took a different approach when defining their activities and intended outputs. The New Forest and South Downs approached their programme by defining four broad outcomes and then setting actions and deliverables under these headings. In contrast, the Lake District divided their programme into nine smaller projects and then set out the interdependencies between each initiative.

In order to draw comparisons between the outputs, and manage the complexities of varying approaches across projects, identifying common themes under which impacts can be quantified and measured is important for clear analysis. The themes identified for the purpose of this report draw upon the main focuses of both projects, centralising attention on the key transport modes that were targeted to increase sustainable travel and the marketing and information sharing approaches used to promote them.

The use of key themes also allows for differentiation between comparing general and specific impacts of different approaches. For example, when considering the improvement of visitor bus services, grouping analysis of the impact of all bus initiatives makes it easier to identify changes which appear to derive benefit independent of location and, equally, measures which are much more specific to particular geographical locations. Being able to identify whether the impact of a travel intervention appears to be dependent on certain geographical factors or, instead, is likely to be effective in a range of different contexts is important when considering the application of lessons learnt in future projects and studies. Understanding the types of environments where certain sustainable travel interventions are likely to succeed, for instance, may serve as a valuable guide for future investments.

The five key themes chosen for analysis were:

- (i) Visitor bus services
- (ii) Cycling
- (iii) Pay-as-you-drive cars
- (iv) Marketing and branding
- (v) Mosaic segment analysis

In terms of identifying the key five themes for analysis, changes to visitor bus services and cycling provisions were common activities seen in the LSTF programmes at all three National Parks. There was mutual recognition across the two programmes that measures to increase visitors' usage of bus services was important. Similarly, cycling was a focus for all three National Parks, as it is an important mode and a collective effort was seen in terms of improving cycle routes and increasing access to cycle hire schemes. As the focus on these two themes was so prevalent in both projects, exploring the impact of the interventions associated with these modes is important analysis.

The use of marketing and branding to promote sustainable modes of transport and new travel initiatives was also common to all three national parks and was presented in the project plans

as being overarching in terms of supporting the other interventions. All national parks in this study used branding campaigns throughout their projects and relied on marketing and information sources as a means of disseminating information to visitors in a bid to increase uptake of sustainable travel. Understanding the impact of marketing and branding in LSTF programmes is important for the purpose of informing future considerations about which measures are effective at increasing visitors' engagement with sustainable travel.

The Lake District also focused on the use of Pay-as-you-drive cars and a car sharing system as a key initiative to reduce the need for private cars. This approach was not replicated in the other parks, but car-sharing is an approach that is readily associated with sustainable travel across the UK and therefore thematically is useful to assess in terms of the subsequent application of lessons learned from this study. Further to this, the Lake District developed parking strategies and introduced measures in car parks to encourage the use of public transport. The introduction of clear information boards, coupled with cycle hubs at some locations, linked the role of parking and hubs to their overall strategy. The use of parking and hub initiatives, particularly at rail stations, to support sustainable travel is another area from which future lessons and comparisons can be drawn.

4.2 Visitor Bus Services

Rationale for interventions

Visitor bus services are a proven mechanism for delivering travel behaviour change in both rural and urban areas. At full capacity, an open top bus has the potential to remove at least 18 private car journeys²⁰ from the highway network, contributing to carbon reduction, and facilitating economic growth by routing services to the areas of greatest spending opportunity. Visitor bus services which link with rail stations also have the potential to remove car journeys to a National Park, by providing consumers with confidence of high quality joined up transport options.

The two LSTF programmes recognised that with additional investment, improvements to the quality, frequency, and routing of visitor bus services would enhance the passenger transport networks.

Summary of interventions

All three project areas progressed slightly different strategies for visitor bus services, influenced in part by the nature of the areas, and the priority attached to visitor bus services prior to LSTF.

The strategy in the New Forest was to invest in the New Forest Tour²¹, allowing it to serve a wider geography, and operate a more frequent service for a longer period of the season. This was complemented by the introduction of a new service – the Beach Bus²² – which operated in the summer months, linking coastal areas in the west and east of the park.

In the South Downs the strategy focussed on extending the period of operation of its visitor bus services, notably enabling the award winning Breeze Bus network to operate on weekends

²⁰ Based on research undertaken in the New Forest National Park, where one New Forest Tour bus can accommodate 72 persons, 50% of which would have driven their car had they used the New Forest Tour, and where the average occupancy of a private car used for leisure visits is two persons, National Travel Survey, 2012.

²¹ www.thenewforesttour.info

²² www.ridethebeachbus.co.uk

during the winter months, and funding weekend services in the summer months on other networks. The South Downs also launched an integrated ticket – the Discovery ticket – bringing together over 15 bus operators to allow consumers unlimited travel across the South Downs and beyond.

In the Lake District three new bus services were introduced, including a bike bus, with capacity to carry up to 18 bikes running between Ambleside and Haverthwaite, and the Lakeland Explorer, a new bus service to link the central Lake District with the Western Lakes and coast. Water bus services also received investment, improving their capacity to carry cycles.

Cost of interventions

Typical costs included funding to support new or enhanced bus services, including the cost of operation, marketing as well as associated roadside infrastructure such as improvements to bus waiting facilities and information.

Table 6: Annual revenue expenditure (£000's) Visitor Bus Services

National Park	2011/12	2012/13	2013/14	2014/15	Total
New Forest	-	53.2	177.4	120.7	351.3
South Downs	-	12.1	80.2	146	238.4
Lake District	43.9	166.8	186	156	553.7

Key Activities and outputs

New Forest

- An additional New Forest Tour route – the Blue Route – was introduced with LSTF funding support in 2013 and received a reduced amount of subsidy in 2014. All three New Forest Tour routes will operate commercially for the first time in 2015.
- Development of a new responsive website for the New Forest Tour, together with full social media integration, online ticket sales and digital PR.
- Enhancements to the New Forest Tour commentary, including GPS triggered commentary announcements.
- Development of customer focussed collaterals, such as guide books, walks and cycle rides accessible from the New Forest Tour
- Funding subsidy for the Beach Bus in 2013 and 2014, facilitating routing and frequency improvements to make the service more relevant to visitors.
- Development of the Beach Bus brand identity, website and bus liveries.
- 1 FTE Sustainable Transport Officer with responsibility for visitor bus services.

South Downs

- Subsidy funding in 2013 and 2014 for the M1 bus service linking Eastleigh rail station with Marwell Wildlife, during school holidays and on weekends and bank holidays.
- Funding support for the network of Breeze Buses to enable them to operate on weekends throughout winter.
- Development of the South Downs Discovery ticket, bringing together over 15 operators to deliver unlimited bus travel to consumers.
- Community Transport enhancements in East and West Sussex.

- 1 FTE Sustainable Transport Officer with responsibility for visitor bus services (as well as a range of other initiatives)

Lake District

- The bike bus, a bespoke vehicle to carry up to 18 bikes running between Ambleside and Haverthwaite.
- The X33 Lakeland Explorer, a new bus service to link the central Lake District with the Western Lakes and coast.
- A new link from Hawkshead to Wray Castle and Grizedale integrating with the existing cross lakes bus and boat service from Bowness to Hawkshead.
- Additional journeys in the early evening to give visitors the confidence to use the bus and stay longer. These were on services 516 Ambleside to Langdale and 505 Ambleside to Coniston.
- LSTF also provided infrastructure improvements including new waiting and information facilities at Windermere Rail bus interchange and new bus stops at new points along key bus routes.
- Carried out a number of water transport service improvements and developed two new jetties for passenger boat use.

Scale of Uptake

The Project Monitoring Report (**ANNEX A**) presents the following percentage changes in passenger journey numbers between 2012 and 2014 for visitor bus services which benefitted from LSTF funding.

Table 7: Visitor Bus Service performance between 2012 and 2014

National Park	Bus Service	Passenger journeys		
		2012	2014	% Change
New Forest	New Forest Tour	33,070	41,877	+ 26.6%
	Beach Bus	24,055	31,597	+ 31.4%
South Downs	Breeze Buses	87,746	97,025	+ 0.6%
	Marwell Zoo Visitor Bus Service	860	2,375	+ 176.2%
Lake District	Lakeland Explorer	1259	2776	+ 120%

All of the services which received LSTF funding showed much greater positive percentage changes in journey counts than services which did not receive funding. In the New Forest, non-funded services showed a mean decrease of -2.1% from 2012 to 2014, compared to the mean 29% increase in the two services funded by LSTF.

The New Forest Tour and Beach Bus were praised by both businesses and customers in the *2014 Business Survey* and 48% of New Forest businesses have noticed an increase in people travelling by bus.

The Sustainable Transport User Survey 2014 (**ANNEX C**), shows that:

- For bus passengers, 84% of groups were adult only and average party size was 2.7 people.
- Bus passengers were the least likely to be new visitors, with 86% having visited before.
- When asked to estimate how many miles they would have travelled by car had they not chosen sustainable transport, 416 bus passengers provided estimates, totalling 26,877 car miles saved, and 64.6 miles on average.
- Average daily spend for bus passengers staying overnight within the National Park boundaries was £40.57 per day, similar to the overall sample at £42.22 per day.
- Average daily spend of bus passengers was £22.26, similar to the overall sample.
- One-third of bus passengers said that they travelled by bus to save money.

Lessons Learned

- All services which were enhanced through LSTF funding demonstrated increases in passenger journeys over the funding period.
- Of the services which did not receive LSTF support, two showed increased use whilst four saw a reduction in the number of passenger journeys. (The New Forest was the only National Park with data available for non-funded services.)
- The main factors discouraging visitors from using the bus reported in the 2014 *Visitor Travel Case Study: Business Survey* are cost and infrequent services.
- Projects also added value to services through discounts, guide books, and creative branding enhancing the visitor experience.
- Businesses in the South Downs are not noticing improvements as much as businesses in the other project areas. Businesses report that at the same time as LSTF being introduced to encourage more visitors to travel sustainably, local authorities are going the opposite way by cutting funding for bus services.

4.3 Cycling

Rationale for the interventions

Before the LSTF programme in 2011, cycling mode share among visitors travelling around the Lake District was low, between 1% and 2%. Whereas, in the South Downs and New Forest, some 12%²³ of visitors walked or cycled to or around the parks.

Before the LSTF programme, between 77% and 85%²⁴ of visitors to the parks stated that motorised transport was their main mode of transport during visits. Journeys to and around the parks cause additional congestion on local roads, bringing with it negative environmental impacts such as CO₂ production, air pollution and disruption to the natural beauty and serenity of the areas. LSTF funded projects were identified as a way to encourage more people to cycle as an alternative mode to driving, by helping remove barriers to cycling in the three national parks.

Summary of interventions

The New Forest and South Downs LSTF programmes focussed on improving cycling and walking routes. This included infrastructure and signage improvements, installation of cycle advisory lanes and provision of high quality cycle parking shelters at key locations. There was

²³ Lake District Sustainable Visitor Transport Beacon Area, LSTF Application, 2011.

²⁴ Source: New Forest Visitors Survey, 2005.

also an improvement to cycle 'way finding', with a focus on journey planners, branding, maps and signage.

Notably, the New Forest and South Downs National Parks were successful with separate DfT Cycling Ambition²⁵ funding, announced in August 2013, to deliver a range of capital improvements in both parks. However, the impact of Cycling Ambition funding is outside of the scope of this Case Study.

The Lake District's main focus included enhancements to the local cycle network and increasing the availability of cycle hire, including e-bikes. Improvements to the cycle network included creating more designated cycling routes and shared walking and cycling paths. In order to join up routes and create a more coherent network, some infrastructure improvements and resurfacing of off-road paths was completed. Additional cycle parking was also installed at attractions along new and existing routes.

The Lake District cycle hire network provides visitors with access to bikes and information about routes to help inform visitors about cycling opportunities. By the end of the fourth year of LSTF there were a total of 200 cycles, including e-bikes, trailers and children's cycles available for hire from cycle hubs, accommodation centres and shop fronts.

In addition to new infrastructure developments and additional bikes, measures were implemented to encourage visitors to use the improved cycle provisions. Route grading and points of interest on weather proof route cards and cycle maps have been designed to help promote and provide a better visitor experience.

Cycle hire and infrastructure improvements was dove-tailed with other LSTF project areas including integration with public transport, smart-ticketing, information and marketing and general promotion of sustainable travel.

Comparison of expenditure

Table 2 outlines cycle related expenditure in the three National Parks. The main areas of spending were infrastructure improvements, however some publicity and marketing offers such as cycle route cards were included in these budgets.

Unsurprisingly capital spend took up the majority of the budget in all three parks, although the Lake District also had a high revenue spend. The majority of funding was spent on hard infrastructure such as building new or reconditioning existing cycle paths or installing cycle parking and e-bike infrastructure.

Grants for improved loan bike availability took up a relatively small amount of the parks' revenue budgets.

²⁵ [/www.gov.uk/government/news/minister-announces-record-62-million-investment-in-cycling](http://www.gov.uk/government/news/minister-announces-record-62-million-investment-in-cycling)

Table 8: Annual revenue and capital expenditure (£000s) Cycling

		2011/12	2012/13	2013/14	2014/15	Total
New Forest	Revenue		13.25	8.4		21.65
	Capital			89.2		89.2
South Downs	Revenue		7.0		15.2	22.2
	Capital		111.0	221.5	328.0	660.5
Lake District	Revenue	132.0	90.6	87.2	67.4	377.1
	Capital	82.5	250.4	250.6	230	813.5

Activities and outputs

The success of activities and outputs has been explored through surveys among three groups of participants. Businesses, visitors and sustainable transport users were asked about their experiences using cycling services and provisions that had been improved through LSTF funding.

Results of the Business surveys found that conventional cycle hire schemes were offered by 9% of all engaged businesses (including non-transport businesses such as accommodation providers). Feedback received from business surveys suggest that the schemes have been implemented well. All cycle hire companies in the survey had increased their amount of bikes available for hire, which has led to increased interest and uptake from visitors.

Some (7%) engaged businesses involved in the Business Survey have offered e-bike hire, this is most common in the Lake District (13 % of respondents); however development of the e-bike network has caused frustration among businesses due to cycle providers not being able to deliver bikes in time.

Feedback from business and visitor groups revealed one overarching theme relating to improvements to cycle paths, cycle lanes and signage. When asked what would encourage them to use more sustainable transport, the main comment relating to cycling was that despite improvements to cycle lanes, roads were still not safe enough and that greater effort should be taken to make them more child friendly.

The main motivators for individuals choosing to cycle to or around the three national parks were the health benefits and that cycling added to their overall visitor experience. Public transport users liked being able to take bikes on buses, although it would be good if they had greater capacity.

67% of local businesses interviewed have noticed the increase in cycling and feel that this is the most increased mode of sustainable transport in their areas. The increases have spurred some business to provide additional services for cyclists including secure parking and electric charging points.

Scale of uptake

There has been a 24% increase in cycle hire in the New Forest in the period 2012-2014, with numbers of bikes hired rising from 29,021 in 2012 to 35,921 in 2014. Cycle counters measuring average daily flow between April and September recorded a 24% increase in

cycling activity in the New Forest between 2012 and 2014, with average daily counts at eight sites increasing from 395 to 491.

In the South Downs, cycle counters recorded significant increases in cycling in a number of locations where new cycle routes were provided. In at least one location, cycling levels had increased by approximately three times the pre-construction baseline, with average daily counts increasing from 1,059 to 3,116 from 2013 to 2014. Taking the figures recorded at the new cycle route locations into account, the average daily count increase in cycling levels in the South Downs is around 94% (from 2,361 in 2013 to 4,581 in 2014).

Table 9: Average daily cycle counts in LSTF areas

Area	2012	2013	2014	% change 2012 to 2014
New Forest	395	460	491	24.3%
South Downs	2,326	2,333	4,485	92.8%
Total	2,721	2,793	4,976	82.9%

One of the ways that the Lake District monitored cycle activity was by recording the number of cycles that were carried across Lake Windermere by ferry. Monitoring indicated that the number of cycles carried on the ferry increased by 30.7% between 2012 and 2013, with numbers increasing from 1164 to 1521. Cycle taster sessions and Sky Ride events in the Lake District also grew in popularity during 2013 to 2014 with year on year number of 401 and 457, an increase of 14%.

Bus Bike services appeared to be negatively affected by changes with the number of bikes being carried decreasing from 185 to 98 between 2012 to 2014 (47%). However, this figure shows a large yearly fluctuation; between 2013 and 2014 there was a 70% increase.

Due to a lack of baseline data to apply the rates of cycling change, it is not possible to calculate the costs of additional cycle trips made by visitors choosing cycles to travel around the South Downs and New Forest.

Indicators for cycling trends in the Lake District included monitoring the volume of bikes carried on the Windermere boat. For calculating the cost of additional cycle trips this data is not suitable however, over the two-year period an increase of approximately 80% (15,947 in 2012 and 28,977 in 2013) in cycles being carried was observed against costs for cycle network improvements which totalled £1.1 million. It is also important to mention that as more cyclists benefit from the scheme over coming years, the costs per trip will also reduce.

The New Forest experienced a 16% increase in the number of bikes hired during 2013 to 2014 (from 31,061 to 35,921 bike hires). The total revenue invested in improving access to conventional and electric bikes and cycle infrastructure improvements totalled £111,000 over the LSTF period.

Lessons learned

- Electric Bike Network: Due to the sparsity of the network, users have commented that they have to ride long distances at a time - this requires a commitment to cycling for the whole day.

- Cycle network: Cycle lanes on roads could still be made safer to allow children and inexperienced riders to travel around the national parks by bike (this was raised in the Business Survey interviews).
- Monitoring: For the purpose of comparison standardised monitoring could have been applied to all LSTF national park schemes to help verify which schemes were most effective and provided best value for money.

4.4 Pay-as-you-drive cars

Rationale for the interventions

In 2011, the Lake District and Cumbria County Council LSTF bid included a project to introduce a local low emission car hire network to the area. The aim was to challenge the perception that visitors need to drive to the Lake District in order to be able to travel around whilst there. Evidence from organisations such as CarPlus suggests that users of car club vehicles are also more likely to use other forms of sustainable transport²⁶, which could result in additional benefits to the area including reduced emissions and increased bus/rail patronage.

The 2011 New Forest/South Down LSTF bid did not include a pay-as-you-drive car initiative. However, over 20 electric Renault Twizys²⁷ are available to hire in the New Forest as a result of a purely private sector venture.

Summary of interventions

The Lake District project intended to build on an initiative by local communities in Kendal and Staveley to provide a car club offering short term (i.e. by the hour) pay-as-you-go local car hire. The car club aimed to provide a network of car hire “stations” at key points in the area e.g. visitor accommodation centres, settlements etc. and offer low-emission and potentially electric vehicles along with the associated infrastructure required. Visitors would be able to book a car online or via their mobile phone, and use their GoNoWLakes card or smart phone to automatically unlock the vehicle at the start of the booking. It was suggested that use of the cars could be built in to visitor package deals bought locally or booked prior to the visit. The scheme was intended to be marketed to residents and local businesses as well as visitors, to build-in complementary demand in the off-peak season.

Comparison of expenditure

The Lake District bid included the following revenue and capital expenditure for the pay-as-you-drive project between 2011/12 and 2014/15. Although not explicitly stated, it is assumed that these costs cover purchasing and maintaining the vehicles, marketing the car club and paying for any staff required for its operation.

Table 10: Annual revenue and capital expenditure (£000s) Lake District

	2011/12	2012/13	2013/14	2014/15	Total
Revenue	47.0	72.4	58.5	36.6	214.5
Capital	10.0	20.0	10.0	10.0	50.0
Total	57.0	92.4	68.5	46.6	264.5

²⁶ Carplus annual survey of Car Clubs 14/15 www.carplus.org.uk/wp-content/uploads/2015/03/Carplus-Annual-Survey-of-Car-Clubs-2014-London-Final1.pdf

Activities and outputs

The Lake District and Cumbria County Council have worked with car club operator Co-wheels to develop a visitor-orientated car club arrangement enabling people to rent low emission cars on a short-term basis whilst on holiday. First introduced in Spring 2013, two types of vehicle are currently available:

Conventional pay-as-you-drive vehicles (such as the VW up! and Mini Clubman) at key hubs and interchanges for visitors to rent; and Electric Renault Twizys which can be rented from accommodation hubs for days out.

Five conventional pay-as-you-drive vehicles are located at Windermere and Oxenholme stations, Staveley, Ambleside and Coniston. They are all fully fitted with telematics and can be booked through Co-wheels on the spot. Accommodation providers have also been taken on as agents so that visitors can sign up when they arrive.

Five Twizys are located at the following locations:

- Langdale Estate (2 vehicles);
- Grasmere Independent Hostel;
- The Salutation Hotel, Ambleside; and
- Hill of Oaks caravan park, near Bowness.

Scale of uptake

The *LSTF Visitor Travel Case Study: Project Monitoring 2014 report* notes that since 2012, mileage driven in the Lake District in pay-as-you-drive vehicles has decreased by 38%; from 9,463 miles in 2012 to 5,851 miles in 2014. Due to a lack of information about the number of hires, it is not possible to tell whether this reduction represents a decrease in patronage or a shift to shorter trip lengths.

No respondents to the *Visitor Travel Case Study: Sustainable Travel Choices User Survey* in 2013 had used a pay-as-you-drive vehicle whilst 1% reported having done so in the 2014 survey.

In the New Forest, 48% of respondents to the *Visitor Travel Case Study: Business Survey* in 2014 were aware of the electric car hire initiative. Across all parks, 28% of respondent businesses were aware of electric car hire whilst just 4% were aware of pay-as-you-drive car hire options.

Lessons learned

The Lake District and Cumbria County Council cite the following lessons learnt from the pay-as-you-drive initiative:

- Pay-as-you-drive vehicles work best at railway stations, due to a combination of door to door journey marketing and volume of rail station entries and exits. More remote locations such as Coniston (20 miles west of Kendal) are less well used.
- Marketing is essential and as it is such a new concept, raising awareness will take time.
- Renault Twizys are not practical transport but they provide an element of fun and quirkiness which reflects on the whole project. They are novel enough that people who wouldn't normally consider sustainable transport use them as a 'visitor experience' and they are also saving carbon as the alternative for these people would be driving larger, potentially more polluting, vehicles.

- Clear agreements are needed with operators for clarity of roles.
- Development time is required to work with businesses to gain buy-in.
- The fact that the pay-as-you-drive cars are there reinforces the message that 'you don't need to bring your car with you, catch the train to the Lake District' and people will – even if they don't in the end make use of the cars.
- It can take time to engage with train operating companies, but once partnerships are established train operating companies can lend support in the form of marketing, provision of car parking space, and other logistics.
- Local authorities can be reluctant to release car parking bays due to the potential lost revenue, and may ask for ongoing rental charges that challenge the project's feasibility.

4.6 Hubs and Parking

Rationale for the interventions

While visitors to the Lake District bring large economic benefits, they also impose some significant environmental impacts. Some 87% of visitors arrived by car, resulting in emissions of 322,000 tonnes CO₂e (CO₂ equivalent – takes into account all other gases emitted) per year from driving to the Lake District and 205,000 tonnes CO₂e from car travel around the Lake District²⁸. This compares to the somewhat smaller 165,000 tonnes CO₂e from personal car travel by Lake District residents. During school and bank holidays, traffic can cause congestion, delays to bus services on some routes, and problems with parking 'overspill' into inappropriate areas, such as roadside verges. This impacts on all transport users. Evidence presented in the Visitor Surveys indicates that roughly half of visitor car users would like to reduce their car use, so the potential for behaviour change is high.

Traffic congestion, in the Windermere area especially, causes serious problems to bus services at busy times of the year. Large numbers of vehicles also clog up minor roads in tourist 'honeypot' locations (areas which attract large numbers of tourists), such as Great Langdale. Ways to manage traffic more effectively were therefore needed.

Visitors to the New Forest and South Downs National Parks were asked in a 2009/10 survey whether there was anything that would improve their experience in the Parks, with the most frequent suggestion (apart from the weather) being less traffic congestion. This was mentioned by 37% of visitors to the New Forest in 2009 and 23% in 2010.²⁹ By improving transport hubs and making public transport a more attractive option, the aim is to reduce the number of cars on the roads.

Summary of interventions

New Forest and South Downs

The New Forest and South Downs National Parks set out to improve visitor experiences to both National Parks through a focus on improving key 'gateway' railway stations to encourage rail use over the car.

Specific interventions included:

²⁸ Go Lakes (undated) Transforming travel in the Lake District National Park.
<http://mediafiles.thedms.co.uk/Publication/CU/cms/pdf/golakestravel.pdf>

²⁹ Tourism SE (2010) New Forest Visitor and Resident Survey 2010, Table 24

- Marketing campaigns linked to train journeys;
- Promotion of cycle hire schemes; and
- Providing public transport information boards to highlight tourist activities and destinations accessible by sustainable modes.

Lake District

The initial period of the Lake District project focussed on improving travel options for visitors in and around the Lake District, with action to influence mode choice for the journey to the Lake District coming later. Making the Lake District a destination where a car is not essential was envisaged to make it more attractive for visitors to travel to the National Park by public transport.

The bid focussed on the busiest part of the Lake District (the southern and central area), as it would be an easier area to provide a high quality public transport alternative to driving. Visitors staying in accommodation near to the main transport corridors were targeted, as well as visitors making day trips to the main towns and attractions.

Interventions included:

- Developing strategically located cycle hubs at key interchanges, such as railway stations;
- A campaign promoting coach and rail options to visitors as realistic alternatives to driving to the Lake District; and
- Smart phone app pilot to enable people to check real-time local traffic delays and parking availability (and suggesting alternative travel options and destinations).

Comparison of expenditure

The revenue expenditures from the three National Parks are explored here, focusing exclusively on traffic, parking and rail station improvement activities.

Table 11: Annual revenue and capital expenditure (£000s) on traffic management, parking and rail station improvements

National Park	2011/12	2012/13	2013/14	2014/15	Total
New Forest					
Revenue		8.48	20.25	19.17	47.9
Capital		3.0	32.79	116.64	152.43
South Downs					
Revenue		-	13.29	41.14	54.43
Capital		4.5	60.25	63.6	128.35
Lake District					
Revenue	33.0	61.0	51.6	47.2	192.8
Capital	150.0	132.5	142.5	30.0	455.0

New Forest and South Downs National Parks spent the majority of funding here on rail station improvements and the New Forest concierge service.

Activities and outputs

The main activities linked to gateway stations, traffic and parking improvements within each of the three National Parks are summarised in this section.

New Forest

- Capital schemes at Brockenhurst station
- Rail station gateway signage
- New Forest Travel Concierge – a pedal powered mobile unit showing visitors that they do not need a car to explore the beauty of the National Park. Includes information on the New Forest Route, Beach Bus, public buses, trains, walking and cycling routes, as well as visitor attractions. Operates during the summer months from Brockenhurst railway station and other locations around the National Park.
- New Forest Tour/Twizy Hub – this is located close to Brockenhurst railway station, and allows visitors to continue their journey into the National Park via sustainable means.
- New Forest Visitor and Sustainable Travel Information Centre.

South Downs

- Rail station gateway signage;
- Community rail partnerships, including support for the establishment of a new Community Rail Partnership in East Hampshire;
- Access improvements to the Seven Sisters County Park; and
- Station improvements at the following railway stations:
 - Pulborough;
 - Arundel;
 - Southease;
 - Haslemere; and
 - Petersfield.

Lake District

- Pay and display car park payments were integrated into GoNoWLakes ticketing deals;
- A cycle hub was developed at Windermere Railway, providing a bicycle hire scheme, information for cyclists including route information, maps and face to face advice from local staff;
- Windermere and Oxenholme railway station improvements;
- Virgin Train 'Drive Less, See More' joint marketing campaign;
- Improved car parking signage to various car parks across the project area (including Braithwaite Fold, Coniston and Waterhead), and information boards in car parks offering information about sustainable transport alternatives; and
- Feasibility studies looking at a smartphone travel app and variable message signage.

Scale of uptake

According to station usage data collected by the Office of Rail and Road³⁰, between 2012 and 2014 the total number of train passengers grew by 6% in the Lake District, but fell by -1.8% in

³⁰ Available from the ORR website <http://www.rail-reg.gov.uk/server/show/nav.1529>

the New Forest³¹. There was a 3.3% growth for stations relevant to the South Downs National Park³², leaving overall the change across the three LSTF areas of 2.8%. Note that this data includes all passengers, not just visitors, and is collected over the whole year, not just the summer season.

Table 12: Trend for Train Travel in LSTF Areas

Park	2012	2013	2014	% change 2012 to 2014
New Forest	2,410,982	2,349,716	2,366,502	-1.84%
South Downs	16,359,532	16,460,194	16,903,122	3.33%
Lake District	1,040,784	1,052,786	1,103,450	5.68%
Total	19,811,298	19,862,696	20,373,074	2.8%

The data from traffic counters for 2012 - 2014 shows that in the Lake District, average daily traffic across monitored sites grew by 3.8%, and in the New Forest and South Downs National Parks by 2.8%, presenting growth across the three LSTF areas of 3.1% across the two years.

Lessons learned: Railway stations as a hub for sustainable travel.

One of the focuses across the three parks is using railway stations as hubs of activity to promote and encourage the use of sustainable transport. By improving bus and cycle routes from railway stations the parks were able to demonstrate how travelling to their local areas by car is not essential and that their transport needs could be met by alternative methods on arrival. Increasing the frequency of bus services, improving real time information, signage and visitor information provision all support increasing visitor recognition of the option to link rail and bus travel. In addition, providing cycle hire at railway stations was another method adopted to try and reduce reliance on car travel, particularly among day visitors. For one activity provider in the New Forest, being based right beside the train station allows visitors to simply “jump off the train and then jump on the bikes”³³. Combining these actions, with a focus on using railway stations to promote parks sustainable travel ‘brands’, demonstrated how a package of activities worked together to collectively support sustainable travel.

New Forest

Non-car use is generally very low as a mode of transport to reach the New Forest. In the 2014 visitor travel survey 88% of visitors arrived to the National Park by car. However, the vast majority would consider changing mode and a wide range of factors were mentioned. For a quarter of current car travellers, the availability of convenient and low cost alternatives would

³¹ It should be noted that station upgrades at Brockenhurst throughout 2014 caused significant disruption to travel.

³² There were significant increases at Southeast station, possibly attributable in part to the development of a brand new YHA close by, and promotional activity through the LSTF programme designed to draw people in by rail to reach the South Downs Way.

³³ *LSTF Visitor Travel Survey: Business Survey 2014. (p.10)*

make them consider forms of transport other than a car, though they did not specify what type of transport these might be. Others did mention specific types of transport and transport services. Improving the bus service (including more routes, closer bus stops to home, improved time-table) was mentioned by 15% of visitors.

South Downs

By far the most dominant mode of transport is the car (the results also include vans, campervans and motorcycles) with 81% of visitors using this mode among all the modes of transport used and with 82% of visitors using it as their main mode of transport.

Many visitors travel by car to the National Park for practical reasons, and encouraging a shift to sustainable modes has been difficult. Those travelling to and around the South Downs by car were asked whether there was one thing which would make them consider forms of transport other than the car. Nearly half of all car users (48%) felt they had no real choice but to travel with their car for a number of practical reasons such as carrying heavy outdoor equipment, travelling with several small children or with dogs, and therefore did not foresee that it would be possible to change as they simply did not believe there were any practical alternatives. Increasing the transport options available directly from train stations could make sustainable transport more attractive to these groups by making the journey smoother and more convenient.

Lake District

Initiatives to improve railway stations as transport hubs were closely linked to marketing and branding, to increase awareness of sustainable travel as a viable mode to reach the Lake District National Park. The increase in rail passengers is encouraging, and over all modes, almost half (46%) of businesses noticed an increase in how many of their customers were travelling sustainably to the national park since 2012.

4.5 Marketing and Branding

Rationale for the interventions

Before the LSTF programmes, feedback from national park users highlighted the difficulty visitors have locating clear, concise and easy-to-understand information about travelling around the Lake District, South Downs and the New Forest by public transport and other sustainable modes. There had been limited branding of existing bus services, routes and rail gateways and the result was for visitors to largely rely on their cars to travel to and around the parks.

As part of their LSTF programmes, the three parks have focused on enhancing public transport marketing and branding initiatives to ensure public transport options are visible to visitors and easy to understand. To improve the uptake and integration of sustainable transport services, there was a focus on providing promotional literature and information about the different options at locations in the three Parks where visitors tend to inquire about 'what to do next'.

Summary of interventions

New Forest and South Downs

One of the key objectives in the South Downs and New Forest LSTF programme was to promote sustainable travel to visitors before they arrive and during their stay in the parks. They focused on encouraging return visitors to travel by sustainable modes and the LSTF partners worked closely with visitor attractions, accommodation providers and other sources of tourist information to achieve this objective. A series of marketing and branding activities took place to help secure the desired shift from car use to sustainable modes, including:

- Activities linked to train journeys;
- Advice to accommodation and other tourism businesses on promoting sustainable travel information to guests and visitors; and
- Travel awareness campaigns.

Lake District

Go Lakes Travel programme sought to enable visitors to make greater use of sustainable modes of transport when visiting the Lake District through improved public transport branding and marketing campaigns. The programme aimed to enhance the image of public transport services, making services easy to identify and understand, and to empower people to make trips by sustainable modes rather than the car during their stay.

Go Lakes Travel implemented three main marketing projects, these were:

- Development and co-ordination of passenger transport branding;
- An awareness campaign to inform visitors of the sustainable travel options in the Lake District and give them the confidence to make car-free trips; and
- A campaign promoting coach and rail options to visitors as realistic alternatives to driving to the Lake District.

Comparison of expenditure

The revenue expenditures from the three National Parks are explored in Table 4.

Table 13: Annual revenue and capital expenditure (£000s) Marketing and Branding

National Park	2011/12	2012/13	2013/14	2014/15	Total
<i>New Forest</i>					
Revenue	-	54.2	151.4	74.6	280.5
Capital		2.5	2.6	5.2	10.38
<i>South Downs</i>					
Revenue	-	34.8	153.6	103	291.4
Capital		9.5			9.5
<i>Lake District</i>					
Revenue	182.0	111.0	400.0	3533.	1203.6
Capital	30.0	85.0	65.0	55.0	235

All three National Parks had higher revenue expenditure than capital, which is unsurprising given the nature of their marketing and branding outputs.

The Lake District had a much higher revenue spend compared to the New Forest and South Downs, £1,203,600 compared to £243,400 and £224,600 respectively.

The Lake District also had a higher capital spend than the New Forest and South Downs. Capital expenditure in the Lake District was on developing Public Transport information and marketing and on marketing travel around the National Park. The New Forest and South Downs spent capital on range of things including bus stop interpretation boards, new bus stop flags, and bespoke bus shelters.

Activities and outputs

The Lake District held two marketing campaigns to encourage sustainable travel: Travel Around and Travel To. The former targeted visitors across the south and central Lake District and the latter targeted audiences at three key gateways to the park. A consumer brand 'Drive Less, See More' was developed to identify target audiences and key messages. The campaigns drew on leaflets, e-newsletters, outdoor advertising on buses and at train stations and combined ticket offers to engage visitors. Local businesses were provided with a marketing toolkit to encourage and enable them to promote the campaign directly to their visitors. Additionally, the travel section of the Go Lakes website was expanded and enhanced into a microsite, with its own look and feel to compliment the marketing activity and overall aims of the LSTF programme.

The New Forest ran a month long campaign in May 2014 called Family Cycling Adventures. This included providing free activity packs, discounts and freebies at bike hire providers and a social media family cycling photo competition hosted on Facebook and Twitter. The New Forest also held a Walking Festival, offering wildlife walks, history hikes, coastal walks and food trails, among other activities to promote local walks to residents and visitors.

The South Downs ran a marketing campaign which focused on the value and ease of using buses and trains and the negative aspects of driving, including traffic and being stuck in a cramped vehicle. Free and subsidised tickets were offered to encourage people to try making car-free trips, social media campaigns ran over the summer holiday periods to help get parental buy-in and key stakeholders supported the campaign by providing information on their websites and via blog post and social media endorsement.

All three National Parks made films showing visitors using sustainable modes of transport to promote car-free travel in a fun and appealing way. The parks all secured articles in local and national newspapers and used social media campaigns to raise awareness about their activities and offers. Radio was also used as a medium to share information about the sustainable transport options in the New Forest, South Downs and the Lake District.

Example of short films prepared by each of the project areas are shown below:

	<p>The South Downs National Park Authority commissioned this video to promote bus travel to the National Park. The video uses creative editing to integrate sustainable transport into the national park experience.</p> <p>Over 22000 views.</p>
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	<p>The New Forest National Park Authority commissioned this video to showcase the New Forest Tour Red Route. The video uses 'retro' music and contrast to appeal to consumer's desire and envy motivations.</p> <p>Over 19000 views</p>
	<p>Go Lakes Travel commissioned this video to promote sustainable transport modes to and around the Lake District. The video uses cartoon graphic to appeal to consumers.</p> <p>Approaching 1000 views.</p>

Scale of uptake

It is more difficult to quantify the reach of marketing and branding activity, although some evaluation has been undertaken. In the New Forest and South Downs, data has been collected on press coverage, website and social media activity, and usage of information packs, while in the Lake District, surveys were undertaken to assess brand and campaign awareness.

The Lake District's Drive Less See More campaign's monitoring survey³⁴ shows that between 30% and 45% of visitors were aware of the campaign between 2012 and 2014. Survey results also show that marketing activities had a positive impact on visitors' awareness of sustainable travel options between 2012 and 2014:

- 18% increase in awareness of cycling options;
- 15% increase in awareness of boat services;
- 12% increase in awareness of bus services; and
- 6% increase in awareness of train services.

In the New Forest, the Visitor Travel Survey found more people recalled seeing information about sustainable transport during their visit (49%) than beforehand (22%). One-fifth (19%) of visitors to the South Downs had seen information prior to their visit compared to 11% during.

³⁴ <http://mediafiles.thedms.co.uk/Publication/CU-CTB/cms/pdf/DriveLessSeeMoreCampaignMonitor%202014Report.pdf>

Lessons learned

New Forest

Feedback from staff involved with programme delivery confirmed that in the New Forest, linking sustainable transport marketing with heritage and family oriented themes was a successful way of engaging people. Coverage in national and regional press was a big success of the New Forest's marketing campaign e.g. the marketing campaign associated with the LSTF supported Beach Bus was shortlisted for two national awards.

In the delivery of these programmes Destination Management Organisations (DMOs) have been vital in reaching visitors before they arrive and providing a clear route to engage the tourism sector. However, they are not necessarily experts in transport promotion and there is a need to strengthen the links between product and promotion in some areas of their work.

South Downs

Stakeholder interviews in the South Downs felt media coverage of its free bus travel offers was a successful element at the start of its marketing campaign and offering summer long incentives meant social media had time to build momentum and acted as a good advertising tool. The promotional video was considered particularly successful in engaging a wide audience, achieving over 20,000 views on YouTube. Overall, integration of the various elements of the campaign was important: the package was greater than the sum of its parts.

Lake District

As set out in the Drive Less See More campaign monitoring report, outside promotion on buses and at/near rail stations, the Go Lakes website and leaflets were effective ways of raising public awareness. Radio advertising was less effective, unless run in tandem with some form of incentivised competition. The Lake District found brand awareness dropped quite quickly as the focus of the campaign shifted to development of public transport services. Awareness of sustainable travel as a viable mode to reach the Lake District National Park proved to be a complex message to get across out of the county. This is because the message first has to be positioned i.e. let people know this is about the Lake District, then get across the sustainable travel message. Feedback from staff involved in programme delivery indicated that the team managed to get around this by adopting the main Cumbria and Lake District advertising style and capitalised / piggybacked on awareness already built up in the main Cumbria media campaign. This resulted in a higher awareness of a sustainable transport campaign in the area, but a lower unprompted awareness of the Cumbria and Lake District branding.

Mosaic Segmentation Analysis

The Mosaic segmentation analysis was undertaken using the postcodes of those surveyed for the Visitor Travel Surveys. The analysis is representative only of survey participants and does not necessarily represent all visitors to the National Parks. Mosaic segmentation analysis of visitor surveys identified the following results for each of the project areas:

New Forest

The top three segments for visitors to the New Forest in 2014 are D19 Innate Conservatives, B05 Mid-Career Climbers, and B06 Yesterday's Captains³⁵.

Despite being relatively small samples for both the 2013 and 2014 segmentation of New Forest visitors, seven of the top ten segments are the same in both years of analysis, suggesting consistency of significant customer types.

South Downs

The top three segments for visitors to the South Downs in 2014 are F24 Garden Suburbia, 19 Innate Conservatives, and O61 Convivial Homeowners.

Three segments (from a pool of 67 possibilities) are shared between each of the National Parks, featuring in the top ten customer types for the Lake District, the New Forest and the South Downs, these being:

- B06 Yesterday's Captains
- D19 Innate Conservatives
- F24 Garden Suburbia³⁶

Lake District

The top three segments for visitors to Cumbria and the Lake District are F25 Production Managers³⁷, D18 Hardworking Families³⁸, and D19 Innate Conservatives³⁹. Segments have been fairly consistent over the last few years. There have been some changes in the visitor profile since 2009 - but not to a great degree. Out of the top ten segments, eight are the same in both profiles, with some shifts in significance.

Mosaic analysis of postcodes contained within the **Sustainable Transport User Survey** identified that the top three segments for visitors who chose to travel sustainably on their visit to the national parks in 2014 were B06 Yesterday's Captains, F24 Garden Suburbia, and F25 Production Managers. Six of the top ten segments are the same in both years of analysis,

³⁵ **Yesterday's Captains** are mostly older professionals and managers who live in attractive and spacious houses in well-established suburbs of large provincial cities. Here we find people still with active minds and interests who are either approaching or have recently reached retirement, whose children may have left home recently and who, though comfortably off, nevertheless have to be wise in how they spend their declining income.

³⁶ **Garden Suburbia** are mid-life families with above average incomes living in suburbs of larger cities

³⁷ **Production Managers** are people approaching retirement, who have lived in quiet streets of semi-detached, often inter war housing, typically in the established but more pleasant suburbs of large industrial cities for many years. There are also some married couples with children of school years. These are very often the homes of white-collar and technical workers, who are close to having given a lifetime of service in specialist departments of large national or international manufacturing companies.

³⁸ **Hardworking Families** are mostly industrious empty nesters living in unpretentious but agreeable, low density, owner occupied estates, typically built during the 1970s and 1980s on the outskirts of medium sized towns.

³⁹ **Innate Conservatives** live in a mix of housing styles which often includes detached two storey houses and modern style bungalows, set in reasonable plots where retired people enjoy a comfortable lifestyle on the outskirts of market towns and medium size commercial centres.

suggesting consistency of significant customer types likely to choose sustainable transport options during a visit to a national park.

High Index Scores

As well as analysis by volume, it is also possible to use an index score to understand which segments have the greatest propensity to visit the national parks. Using a methodology whereby an index of 100 is average, and anything above this means that there is a higher percentage of this group than would be expected, based on what exists in the national population. So for example, an index of 200 indicates a particular segment is twice as likely to appear in profiles than average.

Using this assessment, the Mosaic segments which have the highest propensity to visit the New Forest are:

- E20 Golden Retirement⁴⁰ (index score 363)
- B08 Dormitory Villagers⁴¹ (index score 304)

The Mosaic segments with the highest propensity to visit the Lake District are:

- C12 Country Loving Elders⁴² (index score 241)
- B10 Parish Guardians⁴³ (index score 224)

The Mosaic segments with the highest propensity to visit the South Downs are:

- B07 Distinctive Success⁴⁴ (index score 509)
- E20 Golden Retirement (index score 392)
- B10 Parish Guardians (index score 354)

The Mosaic segments which are most likely to be travelling sustainably in the National Parks are:

- E22 Beachcombers⁴⁵ (index 290) - also consistent with 2013 results
- E20 Golden Retirement (index 280) - also consistent with 2013 results

The E20 Golden Retirement segment features as very high propensity to visit the New Forest National Park, the South Downs National Park, and also to choose sustainable transport - another significant segment for targeting. B10 Parish Guardians also appear as having a high

⁴⁰ **Golden Retirement** means wealthy people in their 60s and 70s who own distinctive, large properties in attractive areas. They are active with busy social lives, enjoy walking in the countryside, and prefer to use their own cars than public transport. They tend to spend substantially on holidays but do not like using the internet.

⁴¹ **Dormitory Villagers** are comfortably well-off families in spacious homes in pleasant settings but within easy reach of jobs.

⁴² **Country Loving Elders** are older people enjoying retirement on a comfortable pension in the countryside.

⁴³ **Parish Guardians** are couples approaching retirement age with ample income living in very pleasant rural locations.

⁴⁴ **Distinctive Success** refers to successful business people, often self-made, living in large detached houses in semi-rural locations.

⁴⁵ **Beachcombers** are pensioners with good incomes living in holiday areas often close to attractive coastal scenery.

The above definitions come from The Audience Agency (2010) *Introduction to Mosaic 2009 Groups and Types*.

propensity to visit the South Downs and Lake District National Parks - another important visitor type.

Significant Segments

Looking at the visitor profiles, and the profile of sustainable travellers, both in volume and index scores, across both 2013 and 2014 results, the most common visitor segments to the national parks have been identified as:

- B06 Yesterday's Captains
- D19 Innate Conservatives
- F24 Garden Suburbia
- B10 Parish Guardians
- E20 Golden Retirement

When considering sustainable transport provision, information and marketing plans for visitors within the national parks, these key segments, their requirements and what appeals to them should be used to refine and develop the offer.

5 Lessons and Discussion

Key Findings

1. Have the programmes delivered their objectives?

Programme Objective	Case Study Evidence
Increasing the opportunities for visitors to get to the project areas in a sustainable way	<ul style="list-style-type: none"> • Around a fifth of visitors had seen information about sustainable travel prior to their visit to the New Forest (22%) and South Downs (19%). <p>Source: Visitor Travel Survey</p>
Increasing the opportunities for visitors to get around the project areas in a sustainable way	<ul style="list-style-type: none"> • Nearly two thirds of non-transport businesses engaged in sustainable travel and provided visitors with sustainable travel information. • All four bus companies interviewed provided additional services on existing routes. Two companies have introduced new routes. • All seven cycle hire companies interviewed have provided more cycles for hire. <p>Source: Business Survey 2014</p>
Reducing the proportion of visitors arriving by car	<ul style="list-style-type: none"> • Over 80% of visitors travelled by car as their main mode of transport to arrive at the New Forest (87%) and South Downs (82%). • Most visitors have not changed their main mode of transport when travelling to the New Forest (96%) or the South Downs (95%). • Among the 4% of visitors who had changed their mode of transport for travelling to the New Forest, most switched to cycling or car. • Of the 5% who had changed their main mode of transport for travelling to the South Downs most switched to the car from previously using other modes. <p>Source: Visitor Travel Survey</p>
Reducing the impact of travel (by reducing private car use), especially in terms of reducing carbon emissions, and impact on the local environment	<ul style="list-style-type: none"> • Sustainable transport users surveyed in all three National Parks were asked to estimate how many miles they would have travelled by car had they not chosen sustainable transport. In 2013, 472 people provided estimates, totalling 24,630 car miles saved and 52.2 miles on average. In 2014, 830 people provided estimates, totalling 54,662 car miles saved and 65.9 miles on average. <p>Source: Sustainable Travel Choices User Survey 2014</p>
Doing this in ways that help to make the visitor experience more enjoyable	<ul style="list-style-type: none"> • The most prevalent motivation for using sustainable transport was for a more enjoyable way to get around (49% of respondents). <p>Source: Sustainable Travel Choices User Survey 2014</p>

2. How have the programmes had an economic impact?

Indicator	Case Study Evidence
New business start-ups/businesses supported	<ul style="list-style-type: none"> 11% of businesses engaged in sustainable transport reported seeing a significant increase in volume of customers since 2012, this compares to just 1% of non-engaged businesses seeing a significant increase*. <p>Source: Business Survey 2014</p>
Changes in job numbers	<ul style="list-style-type: none"> 26% of businesses engaged in sustainable transport reported seeing an increase in number of employees since 2012, this compares to just 19% of non-engaged businesses seeing an increase*. <p>Source: Business Survey 2014</p>
Changes in tourist numbers	<ul style="list-style-type: none"> 2013 visitor numbers increased in the Lake District by 4.5% on 2012 and the New Forest achieved 0.6% during that time. <p>Source:</p>
Changes in visitor spend patterns	<ul style="list-style-type: none"> Visitors who used the train or private vehicle as their main mode of transport to the New Forest were found to have spent the most on average (£24.47 and £18.93 per person per day respectively) during their visit (excluding accommodation), while those who travelled to the New Forest on foot, by bicycle or using a bus or coach service spent slightly less on average. Those arriving to the South Downs by train spent the most (excluding accommodation), £19.54 per person, per day. Visitors who cycled to the South Downs spent on average more than those arriving by car, bus and coach. <p>Source: Visitor Travel Survey</p>

*There are many significant factors involved in business performance since 2012 and it is beyond the scope of this research to isolate the effect of engagement in the LSTF programme. Significant factors could be weather, external economic factors, or pro-activeness of individual businesses.

3. Which initiatives are most effective?

Programme Objective	Case Study Evidence
Reduced congestion - both actual and perceived	<ul style="list-style-type: none"> The data from traffic counters for 2012 to 2014 shows that average daily traffic counts grew across the three National Parks by 3.1%. <p>Source: LSTF Visitor Travel Case Study Project Monitoring 2014</p> <ul style="list-style-type: none"> Only 4% of businesses interviewed noticed any improvements in congestion on roads in their National Parks since LSTF began in 2012 and a third say congestion has got worse. <p>Source: Business Survey 2014</p>
Visitor awareness of sustainable travel options	<ul style="list-style-type: none"> Most people had not needed specific marketing to know about their sustainable travel choice, as they either already knew about it (36%) or had used it before (33%). 21% found out via a website and 19% from a leaflet. <p>Source: Sustainable Travel Choices User Survey 2014</p>
Visitor propensity to use sustainable travel options	<ul style="list-style-type: none"> 87% of visitors travelling to the New Forest and 82% of visitors to the South Downs use a car as their main mode of transport. For travelling around the New Forest and South Downs, walking is the most dominant with over two-thirds travelling around on foot as their main mode of transport. 85% of New Forest and 73% of visitors in the South Downs travel around on foot as one of the modes of transport used. <p>Source: Visitor Travel Survey</p>
Types of behavioural change, their triggers and perception change	<ul style="list-style-type: none"> 61% of visitors using sustainable travel said they would definitely be more likely to choose this travel choice again on holiday and 36% said they would definitely be more likely to use their travel choice when back home. Sustainable transport users were asked about alternatives to using a car, the most significant triggers of behaviour change lie in more convenient, cheaper, more frequent and accessible sustainable travel choices. <p>Source: Sustainable Travel Choices User Survey 2014</p>
The most effective ways of engaging businesses and achieving buy-in from them	<ul style="list-style-type: none"> 57% of businesses not engaged in sustainable travel said they would be encouraged to get involved if there was awareness of what they could do. <p>Source: Business Survey 2014</p>

SWOT analysis of Visitor Travel LSTF projects overall

<p>Strengths</p> <ul style="list-style-type: none"> • Involvement of non-Highway authorities (particularly National Park Authorities and Destination Management Organisations) in delivery brings innovation and expertise traditionally unavailable in highway authorities. • Changing travel around the National Parks has been successful, in particular visitor bus service development and the growth in cycling. • Engagement with the private sector has been positive. Early indications that positive experiences of sustainable travel by visitors may lead to longitudinal travel behaviour change when they return home. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Current projects focus on incentivising behaviour change, rather than forcing or 'locking it in'. • Short timescales for consultation / implementation of programmes • Mixed success with travel awareness campaign marketing (albeit challenging to measure) • There has been only limited change in travel to the National Parks and this is currently only measured through rail travel. Opportunities with the coach sector should also be explored.
<p>Opportunities</p> <ul style="list-style-type: none"> • To develop stronger links between National Parks, LSTF Active Travel work and the public health agenda. • To disseminate best practice widely across all protected landscapes, is there a common package of features which can be rolled out across all National Parks and protected landscapes. • To develop bolder traffic management plans to discourage car use in National Parks, potentially through a challenge fund. • To grow the length of seasonal services and activities to reach more people, and help grow the visitor economy further by filling bed spaces in the 'shoulder seasons'. 	<p>Threats</p> <ul style="list-style-type: none"> • Unwillingness to explore bolder 'locking in' measures to ensure long lasting behaviour change. • There is concern that future funding may be capital-only developed and delivered by Highway Authorities and that this may lead to skills which have been developed in Non-Highway Authorities being lost.

5.1 Introduction to Lessons and Discussion

When considering the impact of the sustainable travel activities adopted by the three national parks, there are a number of common themes which underpinned many of the initiatives introduced to change the way visitors travel to and around the National Parks. This section will explore some of these common aspects, and the challenges in delivering sustainable travel programmes in protected areas.

5.2 Relationships with local businesses

The Business Survey data showed creating links with local stakeholders and businesses to help promote and increase sustainable travel was a valuable technique employed by all three parks. In the Lake District, accommodation providers in the area acted as agents to help promote and arrange pay as you drive initiatives. In addition, accommodation centres and

shop fronts were important for all parks in helping to increase cycling: 9% of engaged non-transport businesses offered cycle hire, 7% rented out electric bikes and 4% offered electric bike charging points.

LSTF delivery teams consistently feedback that relationships with other transport stakeholders, such as railway stations and local authorities, also proved important in terms of getting support to locate cycle hubs at key locations and securing parking spaces to support pay as you drive schemes. The marketing schemes deployed across the parks also relied heavily on the cooperation of local attractions, accommodation providers and tourist information sources to help raise brand awareness and promote sustainable travel, often simply by providing information to visitors via leaflets.

Learning from the two programmes demonstrates the importance of building these relationships, particularly when looking to rely upon incentives to help increase the use of sustainable travel. 57% of non-engaged businesses stated that raising awareness of how they could contribute to the objectives would have led to greater engagement e.g. providing guidance on how best to promote sustainable travel was a favoured technique, through toolkits, training and one-to-one support. However, it was also recognised that it can take time to develop these relationships and therefore working closely with the relevant stakeholders in advance of launching a new intervention will help support successful delivery. Further to this, ensuring that the relationships have longevity, and are not just established for a short period of time to support a specific campaign, is also an important lesson to ensure positive impacts have long-term potential.

Interviews with project delivery teams implementing the two programmes indicates that Non-Highway Authorities (NHAs) were effectively utilised in designing and delivering schemes, and playing a key role in programme governance. This has most successfully involved National Park Authorities and Destination Management Organisations⁴⁶ (for example Cumbria Tourism / New Forest Destination Partnership). This has brought new expertise and innovation to scheme delivery, with fewer distractions from day-to-day highways and transport issues. These are also organisations with excellent local knowledge and understand the complexities of these landscapes and stakeholder needs. However, many NHAs are reliant on project management costs from LSTF and inevitable fixed term staffing contracts, in contrast to a highway authority who may be able to cover project management costs from their own budgets. Programmes of work in protected landscapes (with their complex stakeholders and layers of environmental protection) are not necessarily suitable for consultancy support from traditional transport consultancies without significant supervision (e.g. Two National Parks LSTF employs around nine staff in project delivery, plus seasonal staff where appropriate).

5.3 Motivations to use sustainable transport

The national parks all focused on increasing the use of cycling and visitor bus services under their LSTF programmes. Feedback presented in the Sustainable Transport User Surveys and Business Surveys suggested that when sustainable transport is marketed as a way to enhance the visitor experience, this is typically met with a good response. In surveys of visitor motivation for using sustainable transport, enjoyment was the most common response with

⁴⁶ Destination Management Organisations are stand-alone membership bodies (often companies limited by guarantee) affiliated to the public sector through relationships with VisitEngland and VisitBritain (the national tourism organisations) and in many cases local authorities. They are experts in promoting their destinations to domestic and international audience, and have strong private sector support.

almost half of responses (49%), and 19% of respondents were looking for a new experience. For example, in the New Forest, the introduction of audio commentary and incentives such as attraction discounts and free ice creams added an additional element to bus travel. In the Lake District and New Forest the electric Renault Twizy's that were introduced, although not deemed the most practical, were considered fun and enhancing in terms of overall experience. Further to this, when considering survey responses in relation to cycling, the health benefits (63%) and the opportunity to enhance the travel experience (62%) were cited as the main reasons for using the mode. There are perhaps more opportunities which can be taken to link the promotion of active travel in national parks to the local public health agenda, given that 48% of survey respondents said they would be encouraged to use forms of transport that were better for their health.

In terms of lessons learned, encouraging the use of sustainable transport as a way to enhance the experience is positive and adds an additional dimension. However, ensuring the use of transport is inclusive to a wide range of groups, such as couples, is particularly important when trying to secure maximum uptake. According to the *Sustainable Travel Choices User Survey 2013*, 80% of respondents across all parks were travelling in adult-only groups.

The programmes contain many schemes that focused on the very peak season (e.g. seasonal bus services, seasonal information provision and guided events). These are likely to be effective at changing existing visitor habits at a time when accommodation and attractions are traditionally busy. However, in order to grow the visitor economy further while reducing the impact of traffic there is a need to look at gradually expanding these services and activities into the 'shoulder seasons' (April to June, September-October).

5.4 Importance of marketing and branding tools

Another key aspect of both programmes was the use of marketing and branding to underpin the variety of activities and interventions being introduced. The Lake District focused a lot of effort in the first year of the programme into establishing the *Drive Less See More* brand and trying to ensure people associated the branding with sustainable travel initiatives. However, as evidenced in the *Drive Less See More* campaign monitoring report⁴⁷, an important learning point from this approach was that, whilst people were aware of the brand during the first year, as soon as the focus shifted to more promotional as opposed to branding activities, awareness quickly reduced. Therefore, if marketing campaigns focus on branding, a sustained approach to embedding the brand may be important.

Getting recognition for a brand outside of the local area was highlighted as a challenge, because of the huge geography that the parks draw visitors from. If the brand needs to reach visitors before they arrive alternative promotional techniques might be required, such as greater focus on ensuring information meets potential/planned visitors in advance of their journeys. Only a third of New Forest visitors had seen information about sustainable travel prior to their visit, along with 19% of visitors to the South Downs. It is also important to consider working with and through existing brands to reach visitors who are already planning to travel to the National Parks, for example, destination and accommodation websites, train operating companies and working with attractions who are already bringing visitors to the area and providing them with information before they do so. The three parks have tested this in some way, but a more strategic approach may be needed to identify the best brands to work with and to target resource at getting a strong message out. Distinctive branding such as 'drive

⁴⁷ <http://mediafiles.thedms.co.uk/Publication/CU-CTB/cms/pdf/DriveLessSeeMoreCampaignMonitor2014Report.pdf>

less, see more' provides a way of identifying when LSTF programme involvement is part of travel behaviour change communications, but persuading key partner brands to deliver the same message their own way may be just as effective – without the expense of brand development.

Having a good understanding of who to target messages towards is vital, hence why Mosaic Segmentation Analysis can be useful. This case study has focused on three national parks, two with relatively high population density and a significant number of local visitors (New Forest and South Downs) and the most visited area of a sparsely populated National Park (Lake District). The Lake District has taken a strategic approach to identifying clear target audiences for interventions, based on significant visitor data and experience from its DMO (they know who is coming and where they are coming from, there is little impact from local residents). In the New Forest and South Downs, such an approach is more challenging because significant numbers of visitors come from nearby and further afield for visits with many different purposes. It may be that interventions in these areas should focus on more local visitors from neighboring towns and cities travelling to the parks for recreation or residents living within the parks than those further afield, as 41% of South Downs visitors and 33% of New Forest visitors are local residents, compared to just 15% in the Lake District.

5.5 Programme delivery

National parks are unique and special places which generate a huge amount of passion and interest from local residents and visitors from across the UK and beyond. This can lead to heightened interest in schemes, particularly of a capital nature and the potential impact they may have on the landscape (positive and negative). As an example, the New Forest National Park has 96 consultees from conservation groups and statutory bodies, recreational interests, local authorities and parish councils. In national parks these issues can escalate to become 'hot topics' attracting significant media coverage for example fears about the project increasing recreational pressure on sensitive habitats in the New Forest or the upgrade of a bridleway adjacent to a lake in the Lake District. National Park Authorities have an important role in trying to reconcile these issues between different user groups and stakeholders, but this can take time and human resources which may need to be factored into initial scheme design.

A key difference in the delivery of capital schemes in rural areas (including protected landscapes) in comparison to urban areas is land ownership and the various levels of environmental protection afforded to land. This can make the development of new walking and cycling infrastructure relatively challenging and time consuming. Table 14 gives some examples of the different challenges as identified by the LSTF programme delivery teams. However, the benefits of these schemes are clear and the three parks have seen large growth in cycling over the programme period. There is a need to ensure that there is enough time for adequate consultation that ensure both policy and regulatory support from other statutory bodies (e.g. other Local Authorities, Forestry Commission, Natural England), conservation and recreation interests (e.g. wildlife trusts, National Trust, CTC/Sustrans) and local communities (e.g. parish councils, community groups, single-issue groups).

Table 14: Examples of challenges for implementing capital walking and cycling schemes within rural areas/protected landscapes and urban areas.

Rural areas / Protected landscape	Urban schemes
<p>Many schemes outside of highway boundary and require involvement from Rights of Way teams and private landowners.</p> <p>Planning consent often required for works.</p> <p>Presence of SSSI/SPA/SAC ⁴⁸habitats</p> <p>New development significantly limited in protected landscapes, reducing availability of developer contributions for schemes.</p>	<p>Schemes often within the highway boundary or urban public spaces.</p> <p>Works usually carried out under permitted development on land owned by the highway authority.</p> <p>Consultation on schemes very locally focused with local residents and businesses, of which there are many.</p> <p>Funding often available from new development.</p>

It has been much easier to deliver innovative revenue funded schemes in national parks and there is indicative evidence of this achieving results in section four. Programme delivery on the basis of standard financial years does present challenges for delivering revenue schemes, when the majority of activity will be delivered in quarter one and quarter two to coincide with the peak visitor season. This has resulted in programmes having a slow start, as there was limited time to prepare for the first summer season. Consideration should be given to allowing visitor travel programme boards more flexibility in spend over financial years, particularly in the early part of delivery.

5.6 Realisation of Aims

5.6.1 New Forest and South Downs National Parks LSTF Programme

Successes

Interviews with project delivery staff identified that key benefits were provided from having a programme involving multiple partners. The ability to learn from other partners' successes and mistakes led to, for example, the South Downs visitor bus starting inspired by the success of the New Forest Beach Bus. Cooperation increased ideas for expanding the reach of projects (for example using various different marketing methods) and enabled joint schemes such as the Woodingdean to Falmer cycle track. It also allowed for more financial flexibility, as over- or underspends in one authority could be absorbed by other partners' projects.

Another strength was the management arrangements: a central coordinating resource (Programme Manager/HCC Finance) to oversee the delivery of the programme and act as main DfT contact point, whilst each project also had its own nominated lead authority, with effective communication between partner projects.

The ability to carry over funding from 2013/14 to 2014/15 made it much easier to plan and prioritise the portfolio of schemes and resulted in higher-quality projects.

⁴⁸ Site of Special Scientific Interest / Special Protection Area / Special Area of Conservation

In particular, the 'Discover Another Way' behaviour change campaign encouraged the use of sustainable transport in the South Downs National Park using videos, social media and subsidised tickets. The quality of feedback and volume of traffic to the general website demonstrated the real success of the campaign and its products. The quality and timeliness of the planning and preparation work that took place prior to delivery provided a clear sense of purpose and provided a solid platform for collaborative working between officers and consultants in the delivery phase. The appointment of external consultants meant that valuable additional resource was readily available and specialist expertise accessible. The fact that clear and appropriate performance measures were set up prior to delivery ensured that progress could be effectively monitored.

Challenges

Early on in the programme, time was lost through the need to agree between delivery partners the detailed portfolio of LSTF projects and budgets, causing delays in commencing schemes.

The majority of infrastructure projects were delivered by local authority partners for whom the, often relatively small, LSTF projects weren't always a priority leading to planning and construction delays. This was particularly the case after the announcement of some major LEP capital schemes that diverted already scarce staff resources.

The short-term nature of the LSTF grant caused some significant challenges. LSTF programme delivery teams report that it was difficult to recruit and retain staff on short-term contracts. It also presented difficulties for delivering infrastructure projects, which often take longer than the two years available; this was compounded by reliance on third parties such as Network Rail, the Highways Agency, and TOCs which work to different timescales. During development, some cost estimates and construction requirements were inaccurate or underestimated (such as the Arundel Station cycle track) due to the short preparation time of bids. There was also limited availability of contractors within this short timescale, leading to increased costs.

In both National Parks, buses play a major role in modal shift but the deregulation of bus services and budget cuts caused issues around supporting and extending new and existing services (investment in services that may disappear after a few months, inability to replace previously cut bus services).

The seasonality of the projects also presented a problem. Unlike other, more utility travel oriented, LSTF programmes, the Two National Parks programme focused almost exclusively on visitor travel. As a result, most high-impact initiatives like visitor bus services and promotion events were limited to the summer visitor season. Only limited sustainable travel alternatives were available during the rest of the year when the value for money of additional initiatives would have been very low.

5.6.2 The Lake District LSTF programme

Successes

The structure of the programme worked well, with dedicated teams reporting to the project manager. The Project Leads conducted monthly meetings, allowing progress to be monitored and measured effectively and maintaining communications between projects.

Marketing and communications proved to be effective and valuable tools that were crucial to the success of the programme. Online methods were much more cost-effective and could reach a larger audience compared to physical formats; however, the leaflets distributed to accommodation providers proved very popular with visitors.

Initiatives such as the Renault Twizy hire cars showed that novelty and enjoyment can be motivational factors to encourage people to try new forms of sustainable transport to enhance the visitor experience.

Challenges

Feedback from the project delivery teams suggested that input from the Project Board was restricted due to the Board having only quarterly meetings. This presented challenges for timely decision making, at times causing implementation delays.

Officers from all parks feedback that early stakeholder engagement is crucial to ensure that communities and partners are familiar with the programme aims and the role they can play. Difficulties with engaging local businesses demonstrated that more communication is needed to ensure continued involvement. There were issues with partners pulling out (even in some cases despite having formed written agreements), and with landowners withdrawing permissions for work to be carried out. One example is the electric bike network (EBN) commercial provider failing to distribute e-bikes in time to accommodation providers who were hoping to hire them out. There was also a lack of support from partners in relation to promotion of elements of the programme, with inconsistent adoption of branding. In the future it would be useful to add requirements to market and use branding as part of contracts/funding requirements.

Feedback from project delivery teams identified that several projects were met with implementation delays and higher than anticipated costs. This was increased by reliance on third parties, especially those that withdrew support for the programme. In terms of infrastructure, there were problems with unexpected changes to work specifications and/or cost. The legacy of the projects was also uncertain: cycling infrastructure projects in particular have been very focussed on practical works with less emphasis on how the routes would be maintained and promoted once complete.

5.7 Financial sustainability

Original LSTF guidance from DfT placed emphasis on ensuring financial sustainability of measures developed through the programme: *“The proposals will need to explain how the measures will be viable and benefits maintained and sustained beyond the period of the Fund without further long term DfT financial support.”*⁴⁹

While the statement above relates to the continuation of DfT funding, it is acknowledged that rural highway authorities will have limited resource in the future to supporting schemes beyond the funding period. The programmes have sought financial sustainability by:

- Embedding new ways of working into business models of delivery partners: for example Destination Management Organisations and tourism businesses promoting car-free travel as part of their everyday activity.
- Reacting to bus service subsidies being cut by Local Authorities: LSTF has provided a useful way of transitioning visitor bus services to a new business model with successful marketing activity and ‘step down’ funding models which reduce the year on year requirement for public sector funding until the service becomes commercially viable.
- Encouraging the private sector to innovate, invest and deliver key messages to visitors, but keeping this private sector led. For example in the New Forest, the private sector has delivered electric vehicle hire with only limited marketing support and grants to support charging infrastructure.
- Developing high quality capital infrastructure and kick starting the promotion of new /existing walking and cycle routes with revenue. Once routes are established and being used this promotion begins to be picked up by the commercial guide books(e.g. commercial walking and cycling guides take time to pick up new routes) and embedded within the experience for staying visitors (e.g. travel itineraries for accommodation providers).
- Developing new income streams to support information provision e.g. commercial sponsorship.
- Developing business models which can sustain events and guided activities through participant fees and sponsorship.

Inevitably this is not universal to every part of each programme, but project boards seem to have an awareness that this funding may not be a permanent fixture and therefore are keen to treat it as a one-off investment of for example, passenger transport. It should also be acknowledged that testing new ideas can reveal themselves to be unable to self-fund (for example, some remote rural bus services in the Lake District) and that this is unlikely to change due to low demand, sparse population and lack of private sector support. There are also differing attitudes to commercial risk in the bus industry across the different areas, with some operators being more willing to develop services at their own risk than others.

5.8 Behaviour change – is it working?

The programmes have focused on providing incentives to deliver travel behaviour change and the volume of investment has raised the profile of sustainable travel in the areas invested in to date. The case study showed some positive indications in terms of sustainable travel use and whilst attributing these benefits to LSTF is challenging, it is possible LSTF may have contributed to some changes in the intended direction. The Sustainable Travel User Survey

⁴⁹ Para 37, https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/43561/guidance.pdf

indicated the primary motivation for cycling were health benefits (63%) and the opportunity to enhance the travel experience (62%) and noticeable uplifts in cycling levels across visitor areas were evidenced, particularly in the South Downs. The overall trend for bus journeys in the LSTF areas also indicated greater use of bus services (3.7% increase between 2012 and 2014).

On the face of it projects do not appear to have delivered an immediate reduction in the amount of traffic (3.1% growth), although more time will be needed to realise the full benefits – particularly from capital projects. However, when placed in the context of growth in the visitor economy over this period, the growth in actual visitor numbers across these destinations during the same time is estimated to be far higher and is likely to be in the region of 5% or more. It is possible that more intensive methods to disincentivise the use of cars to travel to and around destinations will be required in future – see following section.

There are perhaps more opportunities which can be taken to link the promotion of active travel in national parks to the local public health agenda (48% of survey respondents said they would be encouraged to use forms of transport that were better for their health) however responses indicated safety is still a concern.

While the case for investment is made on the immediate benefits to the scheme areas, consideration should be given to how destination based travel experiences can inspire visitors to change their travel behaviour when they return home. The Sustainable Transport User surveys give early indications of this change taking place 61% of all visitors said they would definitely be more likely to choose their sustainable travel choice again on holidays, and 36% said they would definitely be more likely to use their travel choice when back home. But further research is required to understand the nature and longevity of this behaviour change, and its value. The New Forest National Park Authority and Bournemouth University are exploring the role of the visitor 'travel experience' through a PhD studentship (ends 2017).

5.9 Planning for the future

The programmes have focused on providing incentives to deliver travel behaviour change rather than creating forced change which can 'lock in' changes in traffic reduction. The scale of change in traffic count data to date is therefore relatively small. To secure this change for the future consideration should be given to additional demand management measures in National Parks to disincentivise the use of cars to travel to and around destinations. These measures could range from more extensive parking charges, removal of informal parking, to experimental road closures in tranquil areas, or even adapting the Tourism Business Improvement District model to generate funds from business rates to fund free bus travel across an area. This will require bold leadership from multiple organisations, political support at a local and national level, and funding to implement this. It is doubtful that this support is in place, but there is no doubt that the volume of investment has raised the profile of sustainable travel in the areas invested in to date.

National Park Authorities and their Highway Authorities should be encouraged to explore feasibility and ensure adequate consultation for bolder traffic reduction measures which are coupled to sustainable alternatives.

ANNEX

ANNEX A

Project Monitoring Report

The annual project monitoring activity aims to track developments on the ground that have increased the opportunities to get to and around the project areas in a sustainable way, with the ambition of reducing the impact of travel on the local environment and community, helping to make the visitor experience more enjoyable, and meeting carbon reduction targets.

Indicators have been chosen on the basis of their relevance and availability, and cover various modes of transport tailored to the schemes operating in each area. A list of data sources is provided in Appendix A.

In many cases, 2013 is a baseline year, but where possible, data has been collected for 2012 as well, to allow for trend analysis, but this should be treated as indicative only, as the projects were in their infancy during this timeframe. The Lake District National Park project was underway in 2011, but the projects in the New Forest and South Downs did not commence until 2012. It may take some time before the full benefits of these interventions are realised.

By tracking these indicators over time, it will be possible to:

- measure increased opportunities to get to and around project areas in a sustainable way
- identify which interventions have had the most appeal to visitors and been most widely used
- and ultimately, identify those which have had the largest impact on the economy, on carbon reduction, and on changing visitor travel behaviour

Due to the limitations of both time and budget, the indicators tracked do not cover the LSTF projects in their entirety, but instead were selective. In addition, it is not possible to show the direct impact of particular interventions on visitor behaviour as these do not happen in isolation, but instead are subject to a number of other factors. For example, changes in rail passenger journeys will also be taking journeys by commuters and local residents into account, as well as travel for tourism purposes.

Context

This report presents data from 2012 where possible, and then for 2013 and 2014. There are some important considerations to note when interpreting the findings. Firstly, the LSTF projects were in their infancy during 2012 (the Lake District National Park project was underway in 2011, but the projects in the New Forest and South Downs did not commence until 2012). As such, 2012 should be treated as a baseline year where 2012 data is available, otherwise 2013 is the baseline in some instances.

The New Forest National Park received £1.995 million in Cycling Ambition funding for its New Forest Family Cycling Experiences programme in August 2013. This includes a range of improvements to existing cycle routes within the National Park, and a new Family Cycling centre adjacent to Brockenhurst station (opening September 2015). There was some investment over the report period in improved cycle parking and expansion of cycle hire fleets, although the majority of benefits will be realised in 2015/16 and beyond. These other

sustainable transport initiatives will also have an impact on sustainable travel, although this report is concerned primarily on LSTF measures.

In 2013 the South Downs National Park was awarded £3.81 million from the DfT's Cycling Ambition Fund. The funding is part of a total package of planned investment of £5.106m in cycling infrastructure and complementary measures by the National Park Authority and its local authority partners to be spent in the period to September 2015. New cycling routes have been created and other existing routes have been subject to significant refurbishment to create better links into the South Downs from surrounding settlements, improved links from rail station gateways and between villages within the National Park.

There were changes in the tourism sector and wider economy during the reporting period which will also have a bearing on results. In particular, good summer weather during 2013 and 2014 boosted visitor numbers (2013 visitor numbers were up in the Lake District by 4.5% on 2012, and the New Forest achieved a 0.6% increase during that time. 2014 data not yet available but expected to be an increase on 2013 also). At the same time, there were improvements to the wider economy and a corresponding impact on household finances and disposable incomes and spending. Consumer Confidence in the United Kingdom as reported by GfK NOP (UK) rose from a low of -29 in January 2012 to -4 at the end of 2014, and gross domestic product as reported by the Office for National Statistics (ONS) grew by 0.7% in 2012, 1.7% in 2013, and 2.6% in 2014.

Overall Results

There were some significant increases in bus passenger journeys over selected routes and these were most noticeable between 2013 and 2014 when the LSTF projects had had time to establish. Between 2012 and 2014, overall growth in bus passenger journeys for all areas was 3.7%.

There were increases in cycling in each area, over each year, whether monitored by cycle counter, bike hire, or bikes carried by bus and ferry. The only exception to this was for the number of bikes carried by the New Forest Tour which fluctuated during the reporting period. Bike hire in the New Forest increased by 24% between 2012 and 2014, and cycle counters in the New Forest and South Downs showed an increase of 83%.

Between the baseline year of 2012 and 2014, traffic growth across the three LSTF areas stood at 3.1%. With the growth in actual visitor numbers across these destinations during the same time estimated to be far higher, this level of growth is still a positive sign of a shift in travel behaviour. In the Lake District, measures were in place regarding the use of electric and Pay as You Drive cars. The number of members signed up to these schemes increased by 136%, the number of vehicles available for hire grew by 22%, and usage in terms of miles grew by 63% between 2013 and 2014. However, there was a decrease of -38% in mileage of PAYD cars between 2012 and 2014.

Between 2012 and 2014, there was an overall growth in rail passenger journeys across the three LSTF areas of 2.8%.

While increases in the take up of sustainable travel options is a good thing overall, the extent to which this is attributable to tourism journeys rather than any others, and the extent to which they may have been directly influenced by the LSTF projects, is relatively unknown.

Mode: Cross Cutting

These indicators are cross-cutting as they look at sustainable transport use overall, without distinguishing by individual mode. The ambition is to increase the number of visitors travelling to and around the National Parks during the 2014 visitor season on sustainable transport, through LSTF project activity.

At first glance the figures for the % of visitors travelling to the New Forest by sustainable transport seems to show a worrying decrease, from 22% in 2013 to 10% in 2014 - however these are only 'snapshots' in time, and the survey carried out in the baseline year picked up 10% of visitors who arrived by coach tour, as opposed to 1% in 2014, which explains much of the difference. (The 2013 survey was carried out over a two-week period between 26 August and 14 September, while the 2014 survey was carried out over a longer (and therefore potentially more robust) ten week period from 3 July to 14 September. In an ideal situation, surveys would be carried out throughout the calendar year, to capture the most representative sample possible, but this was not possible due to time and budget constraints).

The number of visitors meaningfully engaged by the New Forest Travel Concierge⁵⁰ increased by over 100%, and the percentage of visitors travelling to the South Downs using sustainable transport increased by 5.8% between the baseline year and 2014.

Mode: Bus

Between 2012 and 2014 there was a 3.7% increase in bus passenger journeys across the three National Parks. For those routes directly funded by LSTF projects the increase was nearer 19%, or an additional 27,143 journeys. This is clearly a positive trend.

Table 1: Trend for Bus Journeys in LSTF Areas

Indicator	2012	2013	Change 2012-13	2013	2014	Change 2013-14	2012	2014	Change 2012-14
Bus Journeys	559,513	573,121	+2.4%	577,310	591,359	+2.4%	555,715	576,068	+3.7%
LSTF Directly funded bus journeys	145,731	160,822	+10.4%	166,720	180,867	+8.5%	145,731	172,874	+18.6%

(NB data in these tables for individual years is subject to change as they are dependent on the data series under comparison - which were not consistent each year e.g there may be data available for bus journey A in 2012 and 2013 but not in 2014, and so data for bus journey A would only appear in the 2012 and 2013 figures).

Mode: Cycling

There is limited data available to monitor cycling activity between 2012 and 2014, and as the number of bikes carried on the New Forest Tour fluctuates between years, the only reliable indicator is of a 24% increase in bike hire in the New Forest between 2012 and 2014.

In the South Downs, cycle counters recorded significant increases in cycling in a number of locations where new cycle routes were provided. In at least one location an increase of more than 200% against a pre-construction baseline was recorded. Counters monitoring seasonal cycle activity across 8 sites in the New Forest and 10 sites in the South Downs show an increase in cycle activity

⁵⁰ People given personalised travel information face-to-face, rather than those just accessing leaflets etc.

of 24% in the New Forest, and 93% in the South Downs, a total of 83% across the two areas between 2012 and 2014. This is equivalent to an extra 2,255 cycles per day - another positive trend.

Table 2: Trend for Cycling in LSTF Areas

Indicator	2012	2013	Change 2012-13	2013	2014	Change 2013-14	2012	2014	Change 2012-14
Bike hire New Forest	29,021	31,061	+7.0%	31,061	35,921	+15.6%	29,021	35,921	+23.8%
Cycle counters (average daily flow)	2,849	2,937	+3.1%	2,821	5,072	+79.8%	2,721	4,976	+82.9%

Mode: Car Use

Between 2012 and 2014, data from traffic counters show a 3.1% growth in vehicle traffic across all areas. Given the growth in actual visitor numbers across these destinations during the same time, this level of traffic growth (at a lower level than the estimated growth in visitor numbers) could still be a positive sign of a shift in travel behaviour by visitors. However, direct impact is impossible to gauge, given that journeys are also undertaken by local residents and commuters, and also with no understanding of the composition of those travelling by car - which could be individuals or larger groups.

In the Lake District, measures were in place regarding the use of electric and Pay as You Drive cars. The number of members signed up to these schemes increased by 136%, the number of vehicles available for hire grew by 22%, and usage in terms of miles grew by 63% between 2013 and 2014, but there was a decrease of -38% in mileage of PAYD cars between 2012 and 2014. Further monitoring over a longer term would be required to establish the trend here.

Table 3: Trend for Car Journeys in LSTF Areas

Indicator	2012	2013	Change 2012-13	2013	2014	Change 2013-14	2012	2014	Change 2012-14
Traffic counts (average daily flow)	323,312	328,815	+1.7%	299,958	303,927	+1.3%	294,921	303,927	+3.1%

Mode: Train

Between 2012 and 2014, train passengers fell by -1.8% in the New Forest, grew by 3.3% for stations relevant to the South Downs National Park, and grew by 6% in the Lake District, leaving overall the change across the three LSTF areas of 2.8%. This is an extra 561,866 train journeys. This growth is good news in general for sustainable travel, but how much of this increase is attributed to tourism journeys rather than any others is unknown.

Table 4: Trend for Train Journeys in LSTF Areas

Indicator	2012	2013	Change 2012-13	2013	2014	Change 2013-14	2012	2014	Change 2012-14
Train journeys (entries and exits)	19,811,298	19,862,696	+0.3%	19,862,696	20,373,164	+2.6%	19,811,298	20,373,164	+3.1%

3 Results

3.1 Mode: Cross Cutting

Baseline data was collected in either 2012 or 2013.

These indicators are cross-cutting as they look at sustainable transport use overall, without distinguishing by individual mode. The ambition is to increase the number of visitors travelling to and around the National Parks during the 2014 visitor season on sustainable transport, through LSTF project activity.

Table 5: Trend for Sustainable Travel in LSTF Areas

Area	Indicator	2012 or 2013 Baseline	2014	% change baseline - 2014
New Forest	% visitors travelling TO the area using sustainable transport	22%	10%	-54.5
New Forest	Number of visitors meaningfully engaged by the New Forest Travel Concierge ⁵¹	1,972	4,441	125.2
South Downs	% visitors travelling TO the area using sustainable transport	17%	18%	5.8

At first glance the figures for the % of visitors travelling to the New Forest by sustainable transport seems to show a worrying decrease - however these are only 'snapshots' in time, and there have been differences in the timing of surveys, as well as the impact of weather and a wider context of an increasing visitor market in general. The survey carried out in the baseline year picked up 10% of visitors who arrived by coach tour, as opposed to just 1% in 2014, which explains much of the difference. (The 2013 survey was carried out over a two week period between 26 August and 14 September, while the 2014 survey was carried out over a longer (and therefore potentially more robust) ten week period from 3 July to 14 September. In an ideal situation, surveys would be carried out throughout the calendar year, to capture the most representative sample possible, but this was not possible due to time and budget constraints).

The number of visitors meaningfully engaged by the New Forest Travel Concierge has increased by over 100%, and the % of visitors travelling to the South Downs using sustainable transport has shown an increase of 5.8%.

⁵¹ People given personalised travel information face-to-face, rather than those just accessing leaflets etc.

3.2 Mode: Bus

Analysis shows that across the New Forest National Park area, bus journeys in the area grew in half of all routes. The directly funded New Forest Tour, and the 112 service both reported an impressive 23% increase in 2013 compared to 2012.

Overall growth in bus passenger journeys for the New Forest was 2.2% across the two years. In the South Downs, increases were reported across all three routes (some of these routes were extended in 2013), resulting in a 3.5% increase in bus passengers overall.

The total combined figure for both areas was a 2.4% growth, but this is in the context of visitor growth across the two years.

Table 6: 2012 - 2013 Trend for Bus Journeys in LSTF Areas (routes not all directly funded)

Area	Bus Route	2012	2013	% change 2012-2013
New Forest	Total	467,109	477,462	2.2
South Downs	Total	92,404	95,659	3.5
All	Overall Total	559,513	573,121	2.4

Analysis between 2013 and 2014 shows an increase of 119% in bus journeys on the two Lake District services that were monitored, and 10% on the two South Downs routes that were monitored. Once again, across the New Forest National Park area, bus journeys in the area grew in half of all routes. The directly funded New Forest Tour, and Beach Bus service both reported increases, of 3% and 35% respectively.

Overall growth in bus passenger journeys for the New Forest was 0.3% across the two years, resulting in a total combined figure for all areas of a 2.4% growth in bus journeys.

Table 7: 2013 - 2014 Trend for Bus Journeys in LSTF Areas (routes not all directly funded)

Area	Bus Route	2013	2014	% change 2013-2014
Lake District	Total	3,335	7,298	118.8
New Forest	Total	483,360	484,661	0.3
South Downs	Total	90,615	99,400	9.7
All	Overall Total	577,310	591,359	2.4

As already discussed, these projects were in their infancy in 2012, but indications are that there was a 4% increase in bus journeys in the New Forest and South Downs National Parks between 2012 and 2014.

Table 8: 2012 - 2014 Trend for Bus Journeys in LSTF Areas (routes not all directly funded)

Area	Bus Route	2012	2014	% change 2012-2014
New Forest	Total	467,109	476,668	2.0
South Downs	Total	88,606	99,400	12.2
All	Overall Total	555,715	576,068	3.7

3.3 Mode: Bike

The indicators in the tables below show the trend for cycling. The ambition was to increase bike use during the 2014 visitor season, by providing more opportunities for electric bike hire/use as well as general cycle hire, encouraging cycling through taster sessions and guided rides, and making it easy to transport bikes around the area.

Table 9a: 2012 - 2013 Trend for Cycling in LSTF Areas

Area	Indicator	2012	2013	% change 2012-2013
Lake District	Numbers of bikes on ferry A	15,947	28,977	81.7
New Forest	Number of bikes hired	29,021	31,061	7.0
New Forest	Number of bikes carried on the New Forest Tour (capacity four bikes per bus)	185	56	-69.7

Data for the indicators on table 5a and 5b were available for both 2012 and 2013. They show that in the Lake District, the number of cycles carried by ferry grew by 82%, and in the New Forest National Park, the number of bikes hired grew by 7% from 2012 to 2013.

The number of bikes carried on the New Forest Tour fluctuates quite a lot each year - a longer term trend analysis for this indicator might be more useful.

Table 9b: 2012 - 2013 Cycle Counters in LSTF Areas

Area	Indicator	2012	2013	% change 2012-2013
New Forest	Rhinefield Ornamental Drive Westbound	40	46	15.0
New Forest	Rhinefield Ornamental Drive Eastbound	74	93	25.7
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route East	33	40	21.2
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route West	30	38	26.7
New Forest	A35 Hunters Hill NE of Knellers Ln (Cycle Site)	54	56	3.7

Area	Indicator	2012	2013	% change 2012-2013
New Forest	A35 Lyndhurst Rd Ashurst Cyclepath	70	73	4.3
New Forest	Castlemain Trail W of Riverside, Ringwood	70	90	28.6
New Forest	C10 Holmsley EB	28	31	10.7
New Forest	C10 Holmsley WB	26	31	19.2
New Forest	Total	425	498	17.2
South Downs	Average Daily Count: Counter 621	647	650	0.5
South Downs	Average Daily Count: Counter 960	1,059	1,034	-2.4
South Downs	B3404 Alresford Rd Winchester Westbound	16	17	6.3
South Downs	B3404 Alresford Rd Winchester Eastbound	25	20	-20.0
South Downs	B3330 Chesil St Winchester Southbound	53	59	11.3
South Downs	B3330 Chesil St Winchester Northbound	51	59	15.7
South Downs	Kingsgate Rd Southbound	109	114	4.6
South Downs	Kingsgate Rd Northbound	100	107	7.0
South Downs	Five Bridges / Viaduct	98	106	8.2
South Downs	B2150 Hambledon Rd SE of Soake Rd. Denmead	108	113	4.6
South Downs	A3 Tor Way Petersfield Cyclepath	158	160	1.3
South Downs	Total	2,424	2,439	0.6
All	Overall Total	2,849	2,937	3.1

Cycle counters monitoring seasonal cycle activity (7 day 24 hour average daily flow 1 April to 30 September) across 9 counters in sites in the New Forest and 11 sites in the South Downs area show an encouraging increase in cycle activity between the two years - of 17% in the New Forest, and 1% in the South Downs, a total of 3.1% across the two areas.

Table 10a: 2013 - 2014 Trend for Cycling in LSTF Areas

Area	Indicator	2013	2014	% change 2013-2014
Lake District	Bike Boat usage	1,164 bikes carried	1,521 bikes carried	30.7
Lake District	Numbers taking part in LSTF funded taster sessions and Skyride events	401	457	14.0
New Forest	Number of bikes hired	31,061	35,921	15.6
New Forest	Number of bikes carried on the New Forest Tour (capacity four bikes per bus)	56	98	75.0
New Forest	Data from 4 off-road cycle counters (Mar - Oct)	46,360	50,370	8.6

Indicators for cycling from bike boats, bike hire, participants in cycle rides, and off-road cycle counters all show increases between 2013 and 2014. There was a 31% increase in bikes carried on the Bike Boat, and a 14% increase in participants in taster sessions and Skyride events in the Lake District. In the New Forest, there was a 16% increase in bikes hired, a 75% increase in bikes carried on the New Forest Tour (this indicator subject to annual fluctuations), and a 9% increase in cycles on off-road routes.

Table 10b: 2013 - 2014 Cycle Counters in LSTF Areas

Area	Indicator	2013	2014	% change 2013-2014
New Forest	Rhinefield Ornamental Drive Westbound	46	65	41.3
New Forest	Rhinefield Ornamental Drive Eastbound	93	92	-1.1
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route East	40	37	-7.5
New Forest	A35 Hunters Hill NE of Knellers Ln (Cycle Site)	56	62	10.7
New Forest	A35 Lyndhurst Rd Ashurst Cyclepath	73	63	-13.7
New Forest	Castlemain Trail W of Riverside, Ringwood	90	88	-2.2
New Forest	C10 Holmsley EB	31	48	54.8
New Forest	C10 Holmsley WB	31	36	16.1
New Forest	Total	460	491	6.7
South Downs	Average Daily Count: Counter 621	650	719	10.6
South Downs	Average Daily Count: Counter 960	1,034	3,116	201.4
South Downs	Average Daily Traffic Falmer Woodingdean Cycle Route ⁵²	28	96	242.9
South Downs	B3404 Alresford Rd Winchester Westbound	17	20	17.6
South Downs	B3404 Alresford Rd Winchester Eastbound	20	21	5.0
South Downs	B3330 Chesil St Winchester Southbound	59	52	-11.9
South Downs	B3330 Chesil St Winchester Northbound	59	51	-13.5
South Downs	Kingsgate Rd Southbound	114	111	-2.6
South Downs	Kingsgate Rd Northbound	107	109	1.8
South Downs	B2150 Hambledon Rd SE of Soake Rd. Denmead	113	117	3.5
South Downs	A3 Tor Way Petersfield Cyclepath	160	169	5.6
South Downs	Total	2,361	4,581	94.0
All	Overall Total	2,821	5,072	79.8

Cycle counters monitoring seasonal cycle activity (7 day 24 hour average daily flow 1 April to 30 September) across 8 counters in sites in the New Forest and 11 sites in the South Downs area show an encouraging increase in cycle activity between 2013 and 2014.

⁵² Includes all users: bike, pedestrian, horse riders. Counts are pre- and post-construction.

In the South Downs, cycle counters recorded significant increases in cycling in a number of locations where new cycle routes were provided. In at least one location an increase of more than 200% against a pre-construction baseline was recorded. Taking the figures recorded at the new cycle route locations into account, the average increase in cycling levels in the South Downs is around 94%. 2013 and 2014 recorded an increase of 7% in the New Forest - in total an 80% increase across the two areas.

Table 11a: 2012 - 2014 Trend for Cycling in LSTF Areas

Area	Indicator	2012	2014	% change 2012-2014
New Forest	Number of bikes hired	29,021	35,921	23.8
New Forest	Number of bikes carried on the New Forest Tour (capacity four bikes per bus)	185	98	-47.0

There is limited data available to monitor cycling activity between 2012 and 2014, and as the number of bikes carried on the New Forest Tour fluctuates between years, the only reliable indicator is of a 24% increase in bike hire in the New Forest between 2012 and 2014.

Cycle counters monitoring seasonal cycle activity (7 day 24 hour average daily flow 1 April to 30 September) across 8 counters in sites in the New Forest and 10 sites in the South Downs area show an encouraging increase in cycle activity between 2012 and 2014 - of 24% in the New Forest, and 93% in the South Downs, a total of 83% across the two areas.

Table 11b: 2012 - 2014 Cycle Counters in LSTF Areas

Area	Indicator	2012	2014	% change 2012-2014
New Forest	Rhinefield Ornamental Drive Westbound	40	65	62.5
New Forest	Rhinefield Ornamental Drive Eastbound	74	92	24.3
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route East	33	37	12.1
New Forest	A35 Hunters Hill NE of Knellers Ln (Cycle Site)	54	62	14.8
New Forest	A35 Lyndhurst Rd Ashurst Cyclepath	70	63	-10.0
New Forest	Castlemain Trail W of Riverside, Ringwood	70	88	25.7
New Forest	C10 Holmsley EB	28	48	71.4
New Forest	C10 Holmsley WB	26	36	38.5
New Forest	Total	395	491	24.3
South Downs	Average Daily Count: Counter 621	647	719	11.1
South Downs	Average Daily Count: Counter 960	1,059	3,116	294.2
South Downs	B3404 Alresford Rd Winchester Westbound	16	20	25.0
South Downs	B3404 Alresford Rd Winchester Eastbound	25	21	-16.0
South Downs	B3330 Chesil St Winchester Southbound	53	52	-1.9
South Downs	B3330 Chesil St Winchester Northbound	51	51	0
South Downs	Kingsgate Rd Southbound	109	111	1.8

Area	Indicator	2012	2014	% change 2012-2014
South Downs	Kingsgate Rd Northbound	100	109	9.0
South Downs	B2150 Hambledon Rd SE of Soake Rd. Denmead	108	117	8.3
South Downs	A3 Tor Way Petersfield Cyclepath	158	169	7.0
South Downs	Total	2,326	4,485	92.8
All	Overall Total	2,721	4,976	82.9

3.4 Mode: Car Use

Data for the indicators on table 12 below were available and collected for both 2012 and 2013. They measure average daily traffic counts. In the Lake District, this is a combined figure for both north and southbound (or east and westbound), average daily traffic flow, and for the New Forest and South Downs area the measure is a seasonal index: a 7 day 24 hour average daily flow from 1 April to 30 September.

The data shows that in the Lake District, average daily traffic across monitored sites grew by 1%, in the New Forest by 2% and in the South Downs National Park traffic flow grew by 1.8% between the two years, leaving the growth across the three LSTF areas as 1.7% on average. 2013 was a much better year for tourism - good summer weather increased visitor numbers to many destinations, and in this context, some growth is perhaps inevitable. (There was a 4.5% increase in visitor numbers to the Lake District, and 0.6% in the New Forest National Park between 2012 and 2013).

Table 12: 2012 - 2013 Trend for Car Travel in LSTF Areas

Area	Route	2012	2013	% change 2012-2013
Lake District	A593 Clappersgate	6,594	6,682	+1.3
Lake District	A591 Langdale Chase	13,154	13,400	+1.9
Lake District	A591 Ratherheath	16,048	16,251	+1.3
Lake District	A593 Broughton to Torver	1,160	1,223	+5.4
Lake District	A5084 Lowick Bridge	1,785	1,813	+1.6
Lake District	A5074 Sampool Bridge	1,438	1,455	+1.2
Lake District	A591 north of Brettagh Holt	25,666	25,495	-0.7
Lake District	A592 north of Newby Bridge	3,871	3,973	+2.6
Lake District	B5284 Crook	2,312	2,437	+5.4
Lake District	Total	72,028	72,729	1.0
New Forest	Rhinefield Ornamental Drive Westbound	971	980	0.9
New Forest	Rhinefield Ornamental Drive Eastbound	569	582	2.3
New Forest	B3054 East of Beaulieu	8,959	9,277	3.6
New Forest	A338 Breamore	12,664	12,906	1.9

Area	Route	2012	2013	% change 2012-2013
New Forest	A337 South of Filly Inn	11,676	11,483	-1.6
New Forest	B3055 Sway	5,560	5,527	-0.6
New Forest	A337 North of Lyndhurst	13,313	13,997	5.1
New Forest	A35 West of Lyndhurst	11,759	12,304	4.6
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route East	7,237	7,391	2.1
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route West	8,192	8,319	1.5
New Forest	A326 Totton Western Bypass North	20,132	20,561	2.1
New Forest	A35 Totton	31,027	31,418	1.3
New Forest	Total	132,059	134,745	2.0
South Downs	A27 Sherfield English	3,741	3,917	4.7
South Downs	B3347 North of Avon	5,800	5,945	2.5
South Downs	B3354 Sth of B2177 Fishers Pond	10,223	10,328	1.0
South Downs	C88 Corhampton	1,978	2,115	6.9
South Downs	B3420 Andover Rd North Winchester	10,199	10,499	2.9
South Downs	B3349 North of Alton	5,669	5,900	4.1
South Downs	B3006 South of Selborne	7,495	7,557	0.8
South Downs	A272 Hinton Ampner	6,231	6,347	1.9
South Downs	B2177 Bishops Waltham	9,976	10,210	2.3
South Downs	Alice Holt Forest Visitor's Centre Access Road	921	1,045	13.5
South Downs	A339 near Wynards Farm	9,215	9,350	1.5
South Downs	A325 Bordon	15,516	15,770	1.6
South Downs	A3090 Pitt	7,705	7,749	0.6
South Downs	B3404 Alresford Rd Winchester Westbound	3,229	3,013	-6.7
South Downs	B3404 Alresford Rd Winchester Eastbound	2,989	2,911	-2.6
South Downs	B3330 Chesil St Winchester Southbound	5,866	5,939	1.2
South Downs	B3330 Chesil St Winchester Northbound	5,058	5,153	1.9
South Downs	A272 Westmark Petersfield	7,414	7,593	2.4
South Downs	Total	119,225	121,341	1.8
All	Overall Total	323,312	328,815	1.7

Table 13a: 2013 - 2014 Trend for Car Travel in LSTF Areas

Area	Project	2013	2014	% change 2013-2014
Lake District	Number of members signed up to car club from the project	33	78	136.4
Lake District	Number of electric/PAYD cars available for hire	9	11	22.2
Lake District	Use of PAYD cars	3,597 miles	5,851 miles	62.7

In the Lake District, measures were also in place regarding the use of electric and Pay as You Drive cars. Between 2013 and 2014, the number of members signed up to these schemes increased by 136%, the number of vehicles available for hire grew by 22%, and usage in terms of miles grew by 63%.

The data for 2013 - 2014 shows that in the Lake District, average daily traffic across monitored sites grew by 2.8%, in the New Forest by 0.8% and in the South Downs National Park traffic flow grew by 1% between the two years, leaving the growth across the three LSTF areas as a modest 1.3% on average. 2014 was an even better year for tourism than 2013 - good summer weather continued to increase visitor numbers to many destinations, and in this context, some growth is perhaps inevitable.

Table 13b: 2013 - 2014 Trend for Car Travel in LSTF Areas

Area	Route	2013	2014	% change 2013-2014
Lake District	A593 Clappersgate	6,682	6,902	3.3
Lake District	A591 Langdale Chase	13,400	13,827	3.2
Lake District	A591 Ratherheath	16,251	16,482	1.4
Lake District	A593 Broughton to Torver	1,223	1,219	-0.3
Lake District	A5084 Lowick Bridge	1,813	1,875	3.4
Lake District	A5074 Sampool Bridge	1,455	1,504	3.4
Lake District	A591 north of Brettagh Holt	25,495	26,409	3.6
Lake District	A592 north of Newby Bridge	3,973	4,106	3.3
Lake District	B5284 Crook	2,437	2,437	0
Lake District	Total	72,729	74,761	2.8
New Forest	Rhinefield Ornamental Drive Westbound	980	944	-3.7
New Forest	Rhinefield Ornamental Drive Eastbound	582	555	-4.6
New Forest	B3054 East of Beaulieu	9,277	9,058	-2.4
New Forest	A338 Breamore	12,906	12,838	-0.5

Area	Route	2013	2014	% change 2013-2014
New Forest	A337 South of Filly Inn	11,483	12,049	4.9
New Forest	B3055 Sway	5,527	5,771	4.4
New Forest	A337 North of Lyndhurst	13,997	14,102	0.7
New Forest	A35 West of Lyndhurst	12,304	12,682	3.1
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route East	7,391	7,459	0.9
New Forest	A326 Totton Western Bypass North	20,561	20,062	-2.4
New Forest	A35 Totton	31,418	31,885	1.5
New Forest	Total	126,426	127,405	0.8
South Downs	A27 Sherfield English	3,917	4,020	2.6
South Downs	B3347 North of Avon	5,945	5,926	-0.3
South Downs	C88 Corhampton	2,115	2,225	5.2
South Downs	B3420 Andover Rd North Winchester	10,499	10,619	1.1
South Downs	B3349 North of Alton	5,900	5,865	-0.6
South Downs	B3006 South of Selborne	7,557	7,563	0.1
South Downs	A272 Hinton Ampner	6,347	6,314	-0.5
South Downs	Alice Holt Forest Visitor's Centre Access Road	1,045	1,224	17.1
South Downs	A339 near Wynards Farm	9,350	9,510	1.7
South Downs	A325 Bordon	15,770	16,226	2.9
South Downs	A3090 Pitt	7,749	7,443	-3.9
South Downs	B3404 Alresford Rd Winchester Westbound	3,013	2,906	-3.6
South Downs	B3404 Alresford Rd Winchester Eastbound	2,911	3,042	4.5
South Downs	B3330 Chesil St Winchester Southbound	5,939	6,095	2.6
South Downs	B3330 Chesil St Winchester Northbound	5,153	5,130	-0.4
South Downs	A272 Westmark Petersfield	7,593	7,653	0.8
South Downs	Total	100,803	101,761	1.0
All	Overall Total	299,958	303,927	1.3

Table 14a: 2012 - 2014 Trend for Car Travel in LSTF Areas

Area	Project	2012	2014	% change 2012-2014
Lake District	Use of PAYD cars	9,463 miles	5,851 miles	-38.2

In the Lake District, there was a decrease of -38% in mileage of PAYD cars between 2012 and 2014.

The data from traffic counters for 2012 - 2014 shows that in the Lake District, average daily traffic across monitored sites grew by 3.8%, and in the New Forest and South Downs National Parks by

2.8%, leaving the growth across the three LSTF areas at 3.1% across the two years. The growth in actual visitor numbers across these destinations during the same time is estimated to be far higher (2014 STEAM data not yet available) and is likely to be in the region of 5% or more. In this context, this level of growth is still a positive sign of a shift in travel behaviour.

Table 14b: 2012 - 2014 Trend for Car Travel in LSTF Areas

Area	Route	2012	2014	% change 2012-2014
Lake District	A593 Clappersgate	6,594	6,902	4.7
Lake District	A591 Langdale Chase	13,154	13,827	5.1
Lake District	A591 Ratherheath	16,048	16,482	2.7
Lake District	A593 Broughton to Torver	1,160	1,219	5.1
Lake District	A5084 Lowick Bridge	1,785	1,875	5.0
Lake District	A5074 Sampool Bridge	1,438	1,504	4.6
Lake District	A591 north of Brettagh Holt	25,666	26,409	2.9
Lake District	A592 north of Newby Bridge	3,871	4,106	6.1
Lake District	B5284 Crook	2,312	2,437	5.4
Lake District	Total	72,028	74,761	3.8
New Forest	Rhinefield Ornamental Drive Westbound	971	944	-2.8
New Forest	Rhinefield Ornamental Drive Eastbound	569	555	-2.5
New Forest	B3054 East of Beaulieu	8,959	9,058	1.1
New Forest	A338 Breamore	12,664	12,838	1.4
New Forest	A337 South of Filly Inn	11,676	12,049	3.2
New Forest	B3055 Sway	5,560	5,771	3.8
New Forest	A337 North of Lyndhurst	13,313	14,102	5.9
New Forest	A35 West of Lyndhurst	11,759	12,682	7.8
New Forest	A35 Lyndhurst Rd Ashurst on road cycle route East	7,237	7,459	3.1
New Forest	A326 Totton Western Bypass North	20,132	20,062	-0.3
New Forest	A35 Totton	31,027	31,885	2.8
New Forest	Total	123,867	127,405	2.8
South Downs	A27 Sherfield English	3,741	4,020	7.4
South Downs	B3347 North of Avon	5,800	5,926	2.2
South Downs	C88 Corhampton	1,978	2,225	12.5
South Downs	B3420 Andover Rd North Winchester	10,199	10,619	4.1
South Downs	B3349 North of Alton	5,669	5,865	3.5
South Downs	B3006 South of Selborne	7,495	7,563	0.9

Area	Route	2012	2014	% change 2012-2014
South Downs	A272 Hinton Ampner	6,231	6,314	1.3
South Downs	Alice Holt Forest Visitor's Centre Access Road	921	1,224	32.9
South Downs	A339 near Wynards Farm	9,215	9,510	3.2
South Downs	A325 Bordon	15,516	16,226	4.6
South Downs	A3090 Pitt	7,705	7,443	-3.4
South Downs	B3404 Alresford Rd Winchester Westbound	3,229	2,906	-10.0
South Downs	B3404 Alresford Rd Winchester Eastbound	2,989	3,042	1.8
South Downs	B3330 Chesil St Winchester Southbound	5,866	6,095	3.9
South Downs	B3330 Chesil St Winchester Northbound	5,058	5,130	1.4
South Downs	A272 Westmark Petersfield	7,414	7,653	3.2
South Downs	Total	99,026	101,761	2.8
All	Overall Total	294,921	303,927	3.1

3.5 Mode: Train

Data for the indicators on table 15 were available and collected for both 2012 and 2013. Information is collected from the official website <http://www.rail-reg.gov.uk/server/show/nav.1529> Data shown is for total entries and exits recorded in the financial years 2011-2012 and 2012-2013. This data includes all passenger journeys, whether for business or pleasure.

The data shows that in the Lake District, train passengers grew by 1.2% between 2012 and 2013, fell by -2.5% in the New Forest, and grew by 0.6% for stations relevant to the South Downs National Park. Overall the change across the three LSTF areas was 0.3% on average. Once again this needs to be set in the context of a larger growth in visitor numbers to these destinations overall (a 4.5% increase in visitor numbers to the Lake District, and 0.6% in the New Forest National Park between 2012 and 2013).

Table 15: 2012 - 2014 Trend for Train Travel in LSTF Areas

Area	Station	2012	2013	% change 2012-2013	2014	% change 2013-2014
Lake District	Windermere	371,762	374,686	0.8	400,630	7.8
Lake District	Staveley	45,448	47,894	5.4	49,656	9.3
Lake District	Oxenholme	436,766	421,422	-3.5	436,154	-0.1
Lake District	Grange-over-Sands	135,118	148,196	9.7	152,436	12.8
Lake District	Cark-in-Cartmel	51,690	60,588	17.2	64,574	25.3
Lake District	Total	1,040,784	1,052,786	1.2	1,103,450	6.0
New Forest	Brockenhurst	1,195,938	1,145,402	-4.2	1,156,246	-3.3
New Forest	Ashurst New Forest	103,642	109,842	6.0	117,340	13.2

Area	Station	2012	2013	% change 2012-2013	2014	% change 2013-2014
New Forest	Beaulieu Road	9,784	10,094	3.2	10,730	9.7
New Forest	Sway	107,474	106,702	-0.7	105,220	-2.1
New Forest	Lymington Town	227,580	231,454	1.7	233,302	2.5
New Forest	Lymington Pier	141,936	133,964	-5.6	123,918	-12.7
New Forest	New Milton	624,628	612,258	-2.0	619,746	-0.8
New Forest	Total	2,410,982	2,349,716	-2.5	2,366,502	-1.8
South Downs	Lewes	2,747,894	2,692,228	-2.0	2,748,555	0.0
South Downs	Petersfield	1,300,356	1,299,358	-0.1	1,312,314	0.9
South Downs	Arundel	288,752	291,114	0.8	300,890	4.2
South Downs	Haslemere	1,700,590	1,700,848	0.1	1,731,616	1.8
South Downs	Southease	13,816	11,634	-15.8	18,042	30.6
South Downs	Amberley	61,468	60,674	-1.3	58,738	-4.4
South Downs	Pulborough	418,458	424,900	1.5	429,984	2.8
South Downs	Hassocks	1,247,224	1,273,332	2.1	1,317,833	5.7
South Downs	Glynde	65,576	67,186	2.5	73,798	12.5
South Downs	Bentley	137,392	137,916	0.4	142,748	3.9
South Downs	Liss	232,516	231,136	-0.6	235,442	1.3
South Downs	Rowlands Castle	99,854	102,276	2.4	106,084	6.2
South Downs	Winchester	4,451,080	4,578,712	2.8	4,734,018	6.4
South Downs	Eastbourne	3,594,556	3,588,880	-0.2	3,693,060	2.7
South Downs	Total	16,359,532	16,460,194	0.6	16,903,122	3.3
All	Overall Total	19,811,298	19,862,696	0.3	20,373,164	2.8

Between 2013 and 2014, train passengers grew by 4.8% in the Lake District, by 0.7% in the New Forest, and grew by 2.7% for stations relevant to the South Downs National Park. Overall the change across the three LSTF areas was 2.6% on average. Once again this needs to be set in the context of a larger growth in visitor numbers to these destinations overall (data for overall visitor numbers in 2014 not yet available).

The data for 2012 to 2014 shows that in the Lake District, train passengers grew by 6%, but fell by -1.8% in the New Forest. There was a 3.3% growth for stations relevant to the South Downs National

Park, leaving overall the change across the three LSTF areas of 2.8% on average. This growth is good news in general for sustainable travel, but how much of this increase is attributed to tourism journeys rather than any others is unknown.

ANNEX B

Business Survey Analysis



REPORT

Cumbria Tourism
LSTF Visitor Travel Case Study

Strategic Marketing

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Contents

1. Executive Summary	76
2. Background and Methodology	78
3. Engaged Businesses	80
4. Non-engaged Businesses	83
5. Financial Performance	89
6. Questions Common to Engaged and Non-engaged Businesses.....	93
7. Conclusions	99
Appendix 1 - Copy of Questionnaire for Engaged Businesses	
Appendix 2 - Copy of Questionnaire for Non-engaged Businesses	

1. Executive Summary

Positive feedback from engaged businesses

- Feedback from businesses engaged in the LSTF programme is mostly positive. Highlights include:
- The open top tour bus and beach bus services in the New Forest are working very well, with much praise from businesses and their customers
- In the Lake District, the leaflets on sustainable travel being provided to businesses have gone down very well, and businesses have to keep requesting top-ups
- Cycle hire is proving to be popular in all three National Parks, and visitors are enjoying the novelty of travelling around by new means

Some niggles however

- Some aspects of LSTF have gone less well, most notably:
- In the South Downs there appear to be conflicting public sector policies whereby sustainable travel is being encouraged through LSTF, but at the same time businesses report that Councils are cutting funding for some bus services
- Development of the electric bike network in the Lake District appears to have caused some frustrations when the new commercial provider was unable to deliver bikes on time

Engaged businesses perform better, but there are other factors involved

- 11% of known engaged businesses have seen a significant increase in volume of customers since 2012, and a further 55% have seen a slight increase. This compares to 1% of non-engaged businesses seeing a significant increase and 46% seeing a slight increase.
- So the figures show that engaged businesses perform better than non-engaged businesses. However, there are other factors involved, one of which is that some engaged operators are naturally more pro-active in how they run their business, and so this is likely to lead to better performance.

Improved financial performance is not a significant motivator for getting involved

- Evidence of improved business performance is not a significant motivator in getting more businesses engaged. Only 4% of non-engaged businesses have stated this is a factor that would encourage them to get involved in future initiatives.

It's about awareness of *how* to get involved

- Making businesses more aware of how easily they could get involved in effective activity will be more influential in encouraging them to do what they naturally feel inclined to get involved with.
- The majority (63%) of non-engaged businesses say they are interested in being involved in future initiatives. Of these, awareness of how they could get involved is by far the top answer to what would encourage them (69% of respondents).

Time is the most significant barrier, but it's a perception problem

- A third (32%) of non-engaged businesses expressing little or no interest in being involved in future programmes say that they are too busy. It appears though that many don't realise they could be involved quite easily just by providing their customers with information – and judging by how popular the leaflets have proven to be in the Lake District, this appears to be an effective way of being involved.

2. Background and Methodology

Why has this research been conducted?

- The Visitor Travel Case Study will provide understanding of how visitor transport and travel contributes to the rural economy, and how to change visitors' travel behaviour. This subject is poorly understood at present in comparison to travel in other contexts such as commuting.
- There are four research strands within the Visitor Travel Case Study, and the fourth of these – the Business Survey – is the subject of this report.
- The findings learned from the Business Survey will feed into a wider report which draws conclusions and recommendations on the most effective LSTF initiatives in changing visitor travel behaviour, and how best to use resources to change behaviour in the future.
- In particular, the Business Survey will contribute to the wider report by detailing business benefits, and how to use these to encourage more businesses to engage in sustainable transport and travel delivery.

How has the research been conducted?

- We have interviewed 300 businesses by telephone in the Lake District, South Downs and New Forest National Parks.
- Businesses are divided into two groups:
 - Those known to be engaged in the LSTF programme
 - Those not known to be engaged in the LSTF programme

Region	Engaged Businesses	Non-engaged Businesses	Total
Lake District	64	67	131
South Downs	61	41	102
New Forest	25	42	67
Total	150	150	300

- The reason for conducting fewer interviews in the New Forest is that the database of engaged businesses was limited (33 usable contacts). We have compensated by conducting more interviews in the Lake District.
- Interviews have been conducted using questionnaires designed by Strategic Marketing in conjunction with the project team. Copies of the two questionnaires (one for engaged and one for non-engaged businesses) are included in the appendices.
- Interviews have been conducted between 9th October and 10th November 2014 with named contacts on the databases provided by the project teams in the three regions.
- The table below shows the number of interviews conducted by industry sector. We have endeavoured to interview as many transport businesses (car hire, bike hire, bus) as possible due to their high level of engagement; the databases contained limited numbers of transport businesses.

Sector	Engaged Businesses	Non-engaged Businesses	Total
Hotel or guesthouse	29	55	84

B&B	23	27	50
Self catering	9	11	20
Caravan park / campsite	7	13	20
Hostel	-	6	6
Attraction	41	29	70
Activity provider	10	9	19
TIC	5	-	5
Car hire	1	-	1
Bike hire	7	-	7
Bus company	4	-	4
Cafe or pub	7	-	7
Retailer	7	-	7
Total	150	150	300

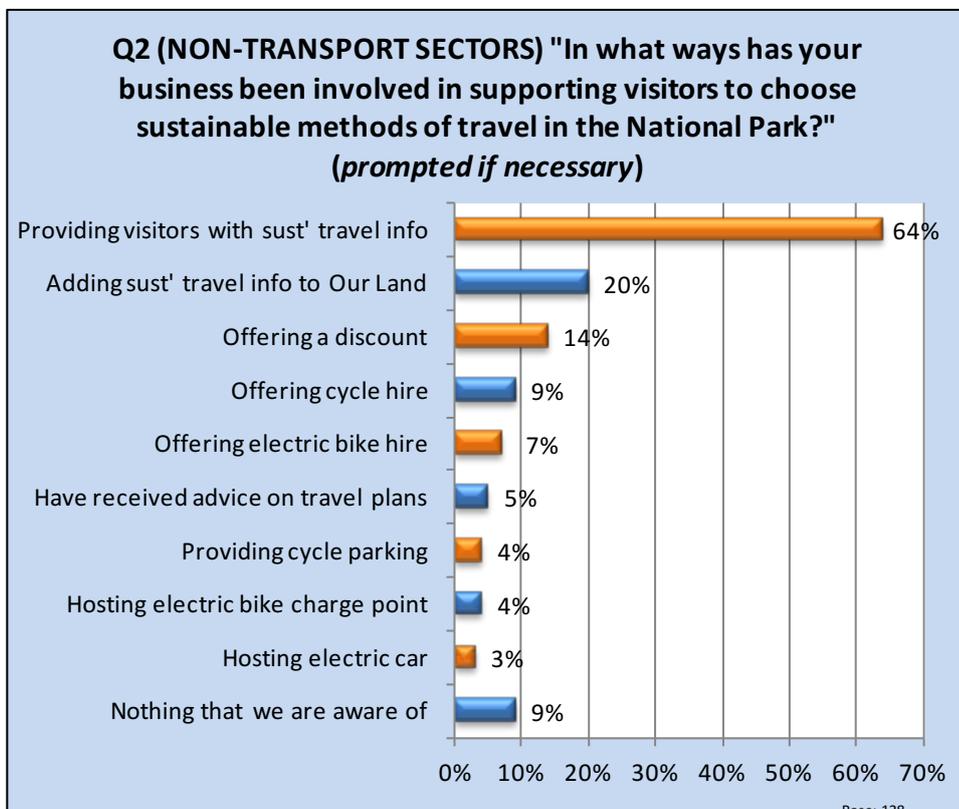
Report structure

- We have divided the results in this report into four separate sections:
 - Questions unique to engaged businesses
 - Questions unique to non-engaged businesses
 - Financial performance comparison engaged vs non-engaged businesses
 - Questions common to all businesses
- We make comparisons between the three National Park regions where differences are statistically significant. This is most likely in questions common to all businesses because the sample sizes for engaged and non-engaged businesses are combined, making results for individual regions more robust.

3. Engaged Businesses

In this section we discuss the results for questions unique to engaged businesses

How have businesses been involved with LSTF?



As transport businesses have been involved in very different ways to non-transport businesses, the above question has been asked in a different way to different types of business. The above chart shows the question and results for businesses not in the transport sectors.

The chart shows the top 10 answers; full answers can be viewed in the cross-tabulations

Informing the customers

- The most frequent way in which business have been engaged in the LSTF programme is through providing their customers with sustainable travel information or car free itineraries.
- In the Lake District, nearly all (88%) engaged businesses have been involved in this way. Typically they have passed on information to customers in the form of leaflets. The leaflets are going down very well with visitors.

*“They [customers] like the idea of leaflets – they like to touch and feel things”
Cafe, Lake District*

- In the South Downs, close to half (45%) of engaged businesses have informed customers by adding sustainable transport information to their Our Land page.⁵³

⁵³ 'Our Land' is a portal for tourism businesses in National Parks and Areas of Outstanding Natural Beauty

Hiring bikes

- Some businesses have got involved in providing wheels for their customers, and this is mostly commonly in the form of a bike. About one in ten (9%) engaged businesses have offered cycle hire, especially businesses in the New Forest (22% of respondents).
- Some (7%) engaged businesses have offered electric bike hire – this is most common in the Lake District (13% of respondents).

Bus companies have provided additional services

- Bus companies have been asked the question “*How exactly has your business helped to improve sustainable travel in the National Park?*”. All four respondents say they have provided additional services on existing routes. The Discovery ticket (*integrated ticket*) appears to have worked well in the South Downs.

“The Discovery ticket has worked very well. It allows customers the flexibility across different operators’ services.”

Bus company, South Downs

- Two of the four respondents say they have introduced *new* routes.

“We have started new links between villages with the help of the funding we were given ... We have also created links with an attraction to take people straight to the attraction from all over the place. Since the funding we have had over 600 passengers from the new routes we have been able to create.”

Bus company, South Downs

Cycle hire companies have provided extra bikes for hire

- Cycle hire companies have been asked the question “*How exactly has your business helped to improve sustainable travel in the National Park?*”. All seven respondents say they have provided more bikes for hire.

“The whole thing has worked well. We are right next to the station and we only have positive things to say.”

Cycle hire company, New Forest

What has worked well?

Excellent reports on the New Forest bus services

- The New Forest open top bus tour and beach bus services have proven to be highly popular.

“The New Forest tour bus has been a success”

Hotel, New Forest

“The [beach] bus has been stunning. It allows older people to get to the beach.”

Attraction, New Forest

Leaflets going like hotcakes in the Lake District

- Businesses in the Lake District in particular have benefited from a regular leaflet supply. Customers just keep taking them.

“The ‘Traveller’s Guide’ leaflet has flown out”

Hotel, Lake District

“The leaflets have been fantastic”

Hotel, Lake District

“The leaflets are going like hotcakes”

TIC, Lake District

Cycle hire is going well

- Cycle hire (conventional bikes) is proving popular in all three National Parks. This part of the LSTF programme appears to have been implemented well, and visitors seem to be enjoying themselves getting around on two wheels.

“We are based right next to the train station, so people jump off the train and then jump on the bikes”

Activity provider, New Forest

What could be done better?

More cycle paths and lanes

- Cycle hire has gone down particularly well in the National Parks, but the infrastructure of a good cycle path network and cycle lanes on roads is generally not considered adequate yet.

“Everyone knows that the infrastructure needs to be put in place. The safety on the roads is not there for cyclists.”

Retailer, Lake District

“There are a lot of gaps that need filling on the routes so they are more child-friendly and do not have to use the roads.”

Retailer, New Forest

Frustrations with electric bike network (EBN) in the Lake District

- Some businesses which have tried to get involved with the electric bike network in the Lake District report frustrations with the new commercial provider.

“The EBN was a nightmare and still is a nightmare. We bought the bikes and at the moment we have had to take them all off [promotions] because the commercial supplier couldn’t come up with the bikes in time.”

Hotel, Lake District

“I guess the only frustration is the EBN ... it was taken over by a commercial provider and we had to drop it because they couldn’t come up with the bikes in time.”

Hotel, Lake District

Bus services inadequate in some areas, especially in the South Downs

- In some areas, bus services are not frequent or extensive enough to offer a viable alternative to travelling by car. The South Downs in particular appears to be lacking in bus services, and some respondents have talked of their local Council cutting funding for some services.

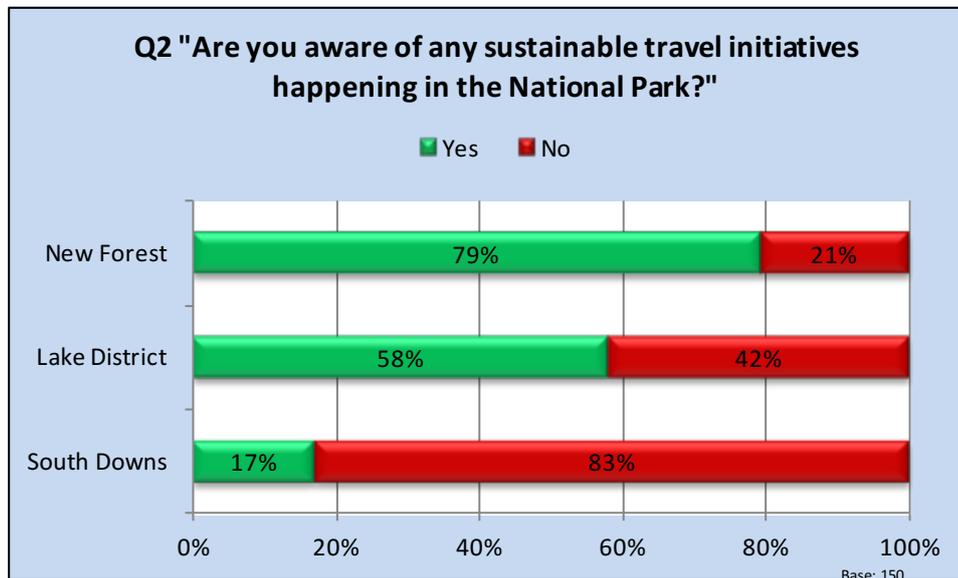
“Better bus route – at the weekends it’s ok, but in the week it’s awful”

Attraction, South Downs

4. Non-engaged Businesses

In this section we discuss the results for questions unique to non-engaged businesses

Awareness of sustainable travel initiatives



Huge variation by National Park

- The awareness of non-engaged businesses in sustainable travel initiatives varies hugely by National Park. This is consistent with comments made by engaged businesses, which emphasise the differences in how successfully the programme has been rolled out and how well businesses and the public sector have worked together.

Close-knit New Forest

- Most (79%) non-engaged businesses in the New Forest are aware of sustainable travel initiatives happening in their area. From comments, this appears to be a combination of the New Forest being a confined area (unlike the Lake District, which is far more spread out) and the success in how the programme has been launched. It is hard not to notice what is going on in the New Forest.

Good awareness in the Lake District – depends on location

- Well over half (58%) of non-engaged businesses in the Lake District are aware of initiatives in their National Park. It appears from comments that awareness depends to some extent on remoteness / centrality of location, and that the awareness isn't as high as in the New Forest because the Lake District is far more spread out, with many businesses in remote areas.

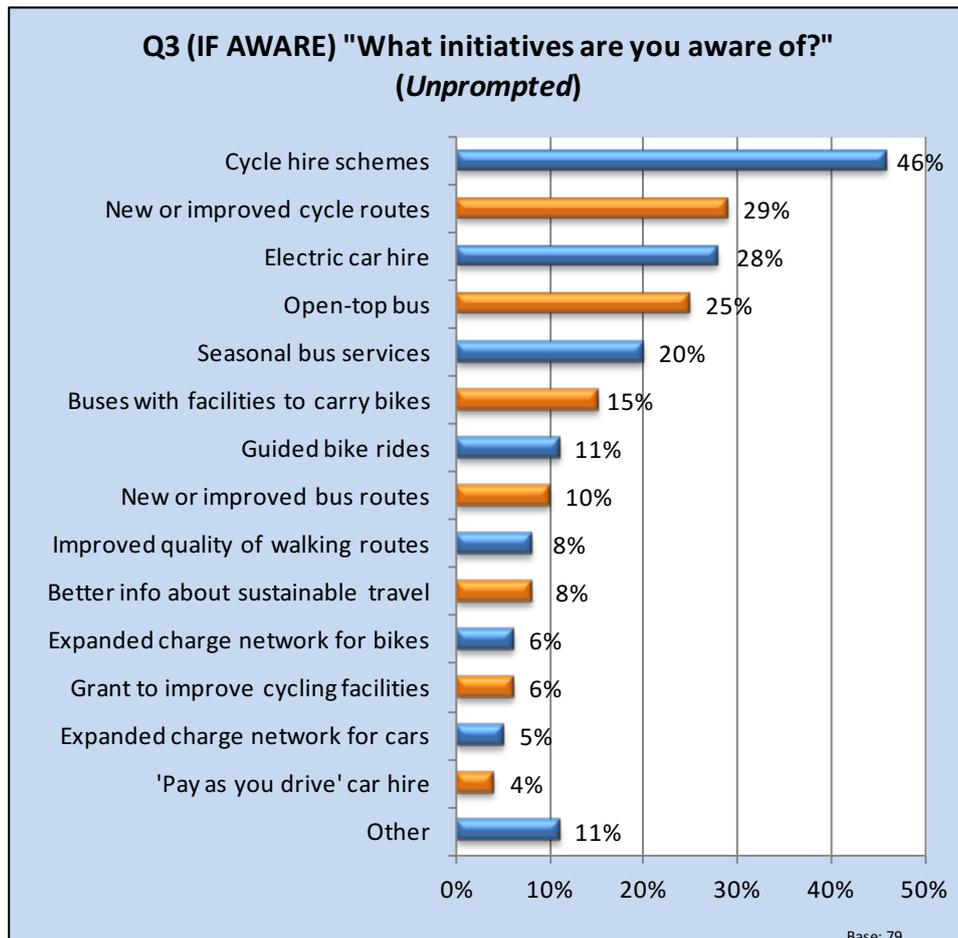
South Downs businesses mostly unaware of the programme

- Most (83%) non-engaged businesses in the South Downs are not aware of anything happening in their National Park. From comments, it is possible that conflicting public sector policies have hindered the effectiveness of LSTF programme implementation.

“Public sector bodies have conflicting policies. The National Park is very keen to promote alternative travel at weekends, but then the Council are withdrawing support for weekend services. The public must be very confused with these mixed messages!”

Bus company, South Downs

What are respondents aware of?



Perception of more cyclists out on the roads

- In open comments, some businesses have mentioned that in some areas the increase in cyclists on the roads is noticeable. Aside from formal promotion, this in itself seems to have been effective in making businesses aware that something is happening in the way of sustainable travel initiatives.

High awareness in the New Forest

- Apart from cycle hire, respondents in the New Forest are very aware of a number of initiatives, most notably the open top bus (61% of respondents) and electric car hire (48%).

How many 'non-engaged' businesses really haven't engaged?

30% claim engagement

- Businesses aware of sustainable travel initiatives have been asked if they have been involved in any way, on the off chance that some may have be 'off the radar' of the engaged contact databases kept by the project teams in each region.

- Three in ten (30%) non-engaged businesses (45 of 150 interviewed) claim they have been involved. The proportion is particularly high (57%) in the New Forest.
- Those claiming engagement have been asked a further open question to explain how they have been involved.

Advocates of sustainable travel

- Most of those claiming engagement have been encouraging their customers to cycle, walk or use buses instead of driving around. In some cases, businesses go to great lengths to keep traffic off the roads.

“We bring a mobile shop onto our site every morning with things like newspapers, milk, food etc. It saves people going off to different shops to get them.”

Caravan park, New Forest

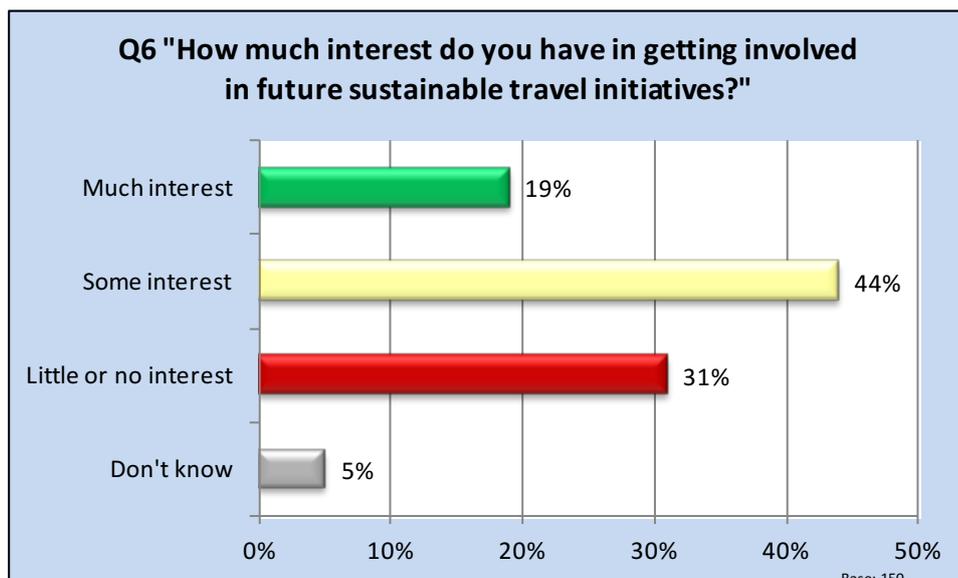
“We use one bus to pick up all of our cleaners so we don’t have about 10 cars on the road and in the car park”

Hotel, New Forest

“Discount rates for cyclist and walkers, parking facilities for cyclists. We also have a mini bus to pick up and drop people who travel by train.”

Hostel, South Downs

How interested are businesses in getting involved in future?



We would like to get involved, but we’re not sure how

- There is a fairly substantial interest in getting involved in future initiatives. Well over half (63%) of respondents say they have ‘much’ or ‘some’ interest in doing so. Interest is particularly high in the New Forest, with a third (33%) of respondents saying they have ‘much’ interest and nearly half (45%) saying they have ‘some’ interest.
- Respondents expressing an interest generally don’t know how they could get involved, but they are open to suggestions.

“I’m not sure, but I’m open to suggestions”

Activity provider, Lake District

“Not sure but I would like to. I think I would need more information to help us.”

Caravan park, South Downs

Facilitating bikes

- Some interested businesses recognise that they could support sustainable travel by providing facilities for bikes, whether conventional or electric.

"Maybe a cycle rack or electric charge point"
Hotel, Lake District

"Maybe a cycle shed would be useful"
Guesthouse, Lake District

We can influence our customers

- Some businesses recognise they have an influential role in what their visitors do when they're in the area and how they go about it. This includes how they travel.

"Getting more and more people aware of the different services"
Hostel, Lake District

"I try to encourage people to use the buses"
B&B, Lake District

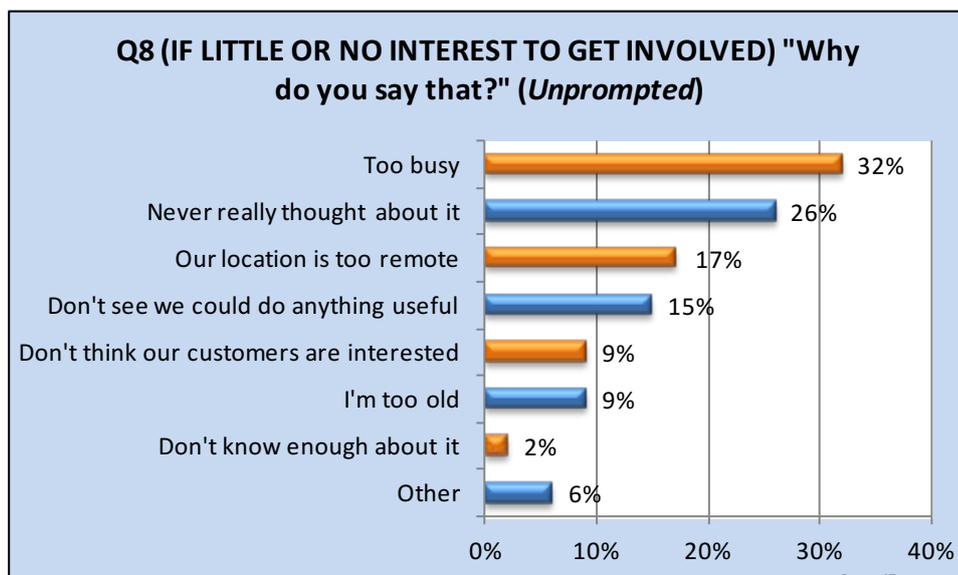
We can help our customers

- Some businesses feel they have a role to play in helping their customers travel sustainably by making it easier for them.

"I pick people up who come down on the train. It stops them bringing their car."
Caravan park, South Downs

"I was thinking I could do my own mini bus service to get customers around the park"
B&B, Lake District

Why are some businesses not interested?



I'm too busy

- The most frequent reason given for having little or no interest to get involved in sustainable travel is being too busy (32% of respondents). These respondents seem not

to realise that they could achieve a lot by providing information to customers at little cost of their own time.

We're too remote

- National Parks almost by definition are always likely to have some areas that are remote from concentrated populations and this makes it difficult to provide services for which there is sufficient demand to cover operating costs. Some businesses in remote areas recognise that they are never likely to have a regular bus service running past their doors.

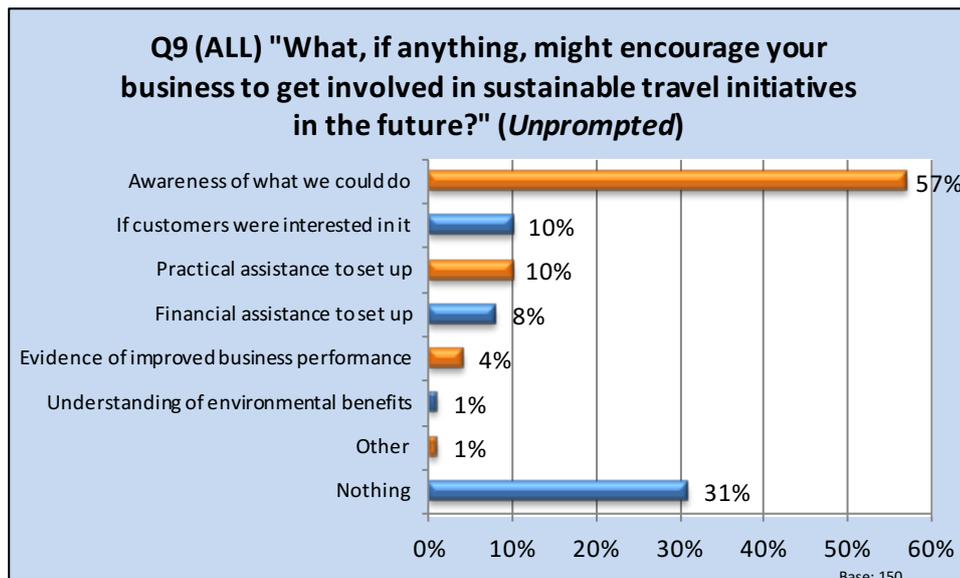
"We're closing, the valley is impassable. No public transport ... no-one comes."
Hotel, South Downs

I'm too old

- Some (9%) respondents say they are too old to get involved. This is a fairly common answer to this type of question in B2B tourism research, as some operators reach an age where they are just content to keep their business ticking along without making an effort to venture into anything new.

"I'm too old to get involved"
Campsite, South Downs

What could be done to encourage more involvement?



Tell us what we could do

- When asked what would encourage respondents to get involved in future, the most frequent answer (57% of respondents) is awareness of what they could do. This is consistent with earlier questions showing that many non-engaged businesses are interested in getting involved in future but are unsure how to.

Evidence of improved business performance not the main motivator

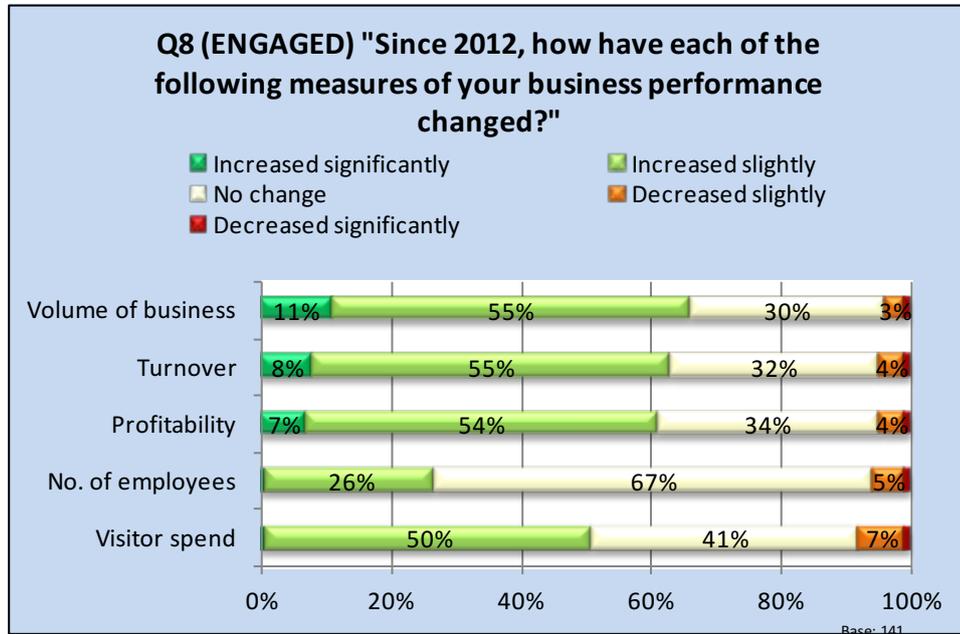
- Sometimes commercial operators want evidence of improved business performance before they commit to doing something new, but with regard to sustainable travel it does not appear to be a significant issue.

- From talking to businesses, there is a general sense of them knowing they should be 'doing their bit' to maintain the quality of the National Park environment. The barrier to increased engagement is not so much about convincing businesses they should get involved, but more about telling them how they can.

5. Financial Performance

Here we compare the financial performance of engaged businesses with that of non-engaged businesses

Engaged businesses

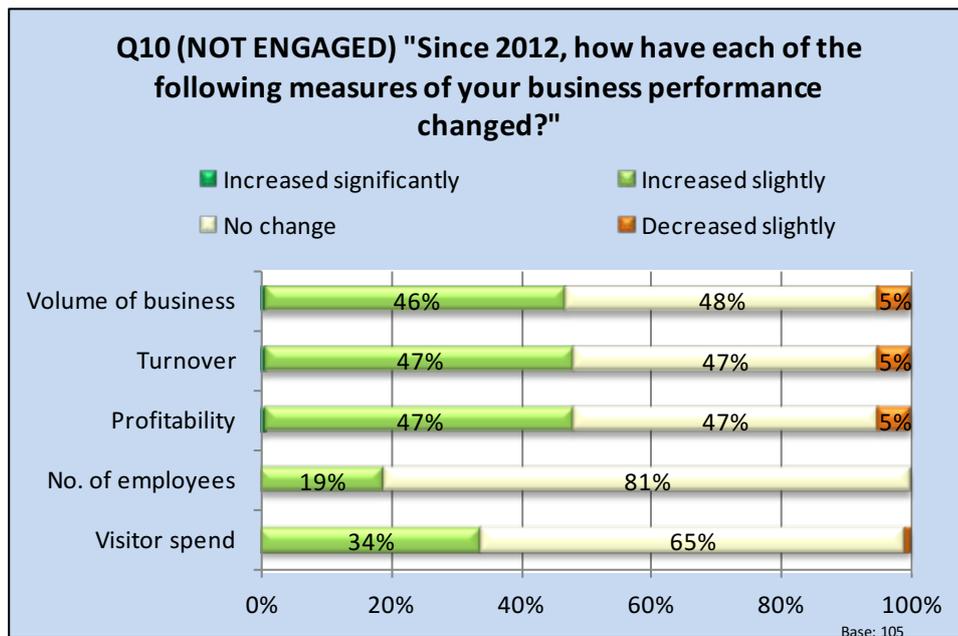


Slight gains since 2012

- The economy has been gradually picking back up over the past one to two years, and the performance of engaged businesses reflects this. Typically, engaged businesses have seen either a slight increase or no change in their volume of customers, turnover and profitability since 2012.
- The importance of this question is the comparison with non-engaged businesses to see whether being involved in the LSTF programme has led to improved financial performance.

Non-engaged businesses

- As mentioned in para. 4.7, 'non-engaged' businesses fall into two camps:
 - Those confirming they have not been engaged
 - Those claiming they have been engaged
- We have split the results between the two, starting with those confirming they have not been engaged:



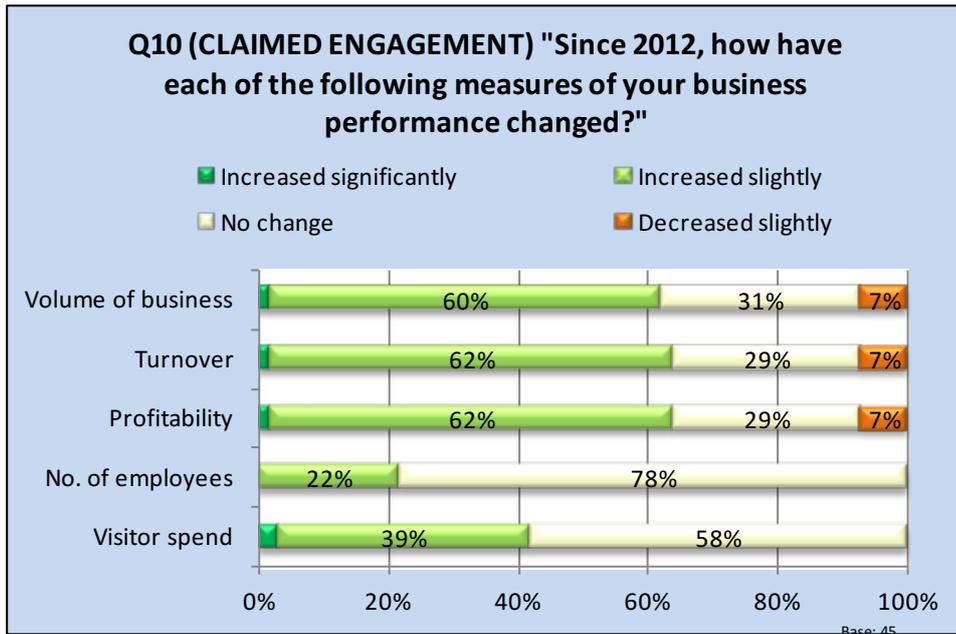
Performance behind that of engaged businesses

- The performance of businesses confirming non-engagement is behind that of known engaged businesses.
- The main difference between these two groups appears to be that the engaged group contains more businesses seeing 'significant' increases in performance. For example 11% of engaged businesses have seen a significant increase in volume of customers since 2012 – this compares to just 1% of non-engaged businesses seeing a significant increase.
- Instead, non-engaged businesses are more likely to have 'stood still' since 2012, with about half (48%) seeing no change in volume of customers, compared to a lower percentage (30%) of engaged businesses.

Other factors involved however

- It is important to note that there are many significant factors involved in business performance since 2012 and it is beyond the scope of this research to isolate the effect of engagement in the LSTF programme. Significant factors include:
 - Significantly better weather in the summers of 2014 and 2013 compared to the years before
 - Upturn in the economy in the past two years
 - Some engaged operators appear to be naturally more pro-active in how they run their business compared to non-engaged operators, and so this is likely to lead to better performance

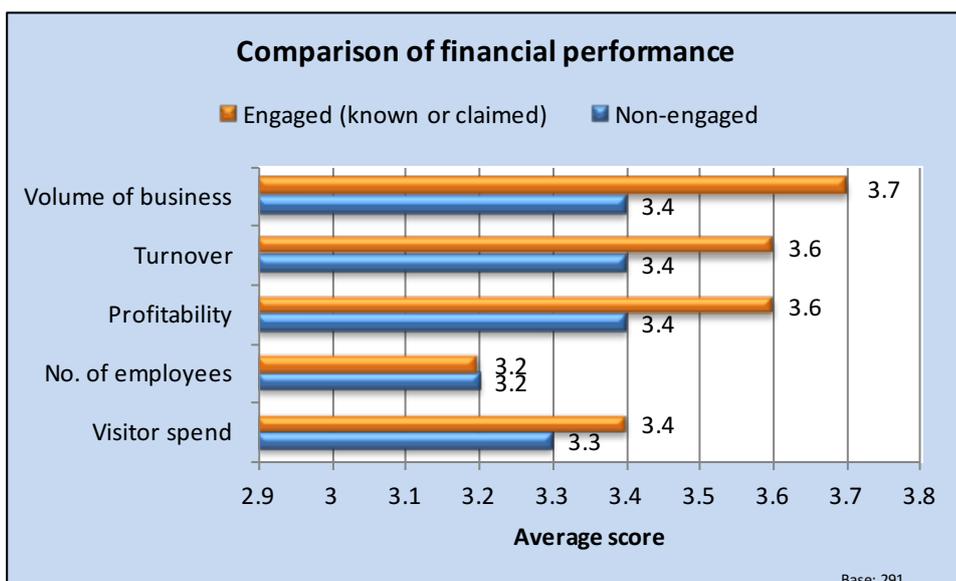
Businesses with claimed engagement



Progressive times for businesses claiming engagement

- This third group of businesses has similarities with those known to be engaged in that the majority have seen their performance improve since 2012. Close to two thirds (62%) have seen their volume of customers increase during this time, and a similar proportion (64%) have seen their turnover increase.
- As mentioned above in paragraph 5.8, operators engaging in the programme are naturally more pro-active in how they run their business, and this is likely to lead to better performance.

Comparison of performance

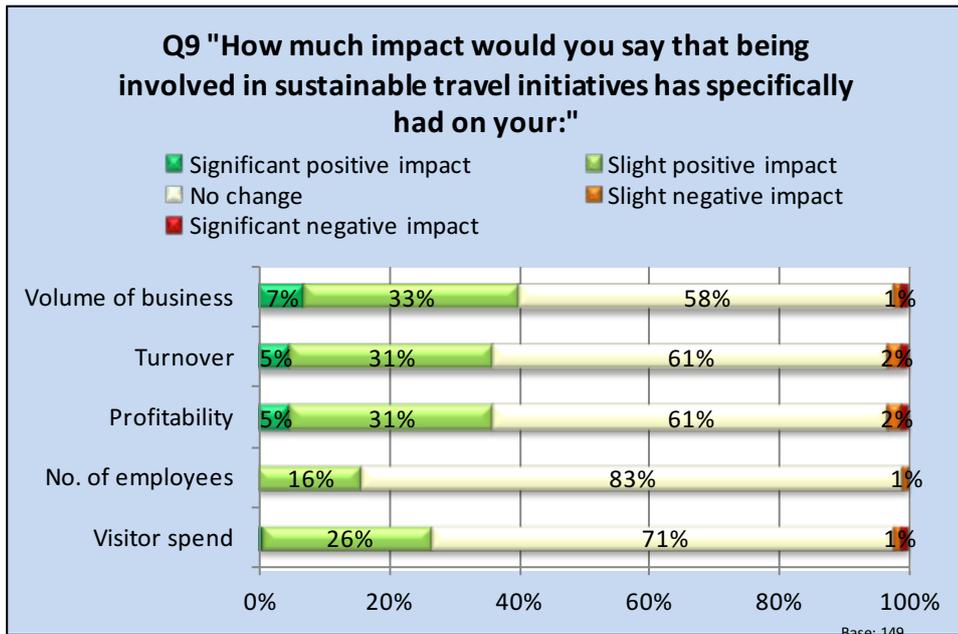


As a means of comparing performance between groups we have converted answers into scores, whereby a significant improvement scores 5 points, a slight improvement scores 4 etc down to a significant decrease scores 1 point. The chart shows the average scores for engaged businesses – in this case either known to be engaged or they claim to be engaged – and known non-engaged businesses.

Engaged businesses have performed better in terms of volume

- Engaged businesses have out-performed non-engaged businesses in most aspects of measurement, albeit the difference is only slight in some areas.
- The most noticeable difference is in volume of business, where engaged businesses score an average of 3.7, compared to non-engaged businesses' average score of 3.4.

Perceived impact of engagement



Perceived slight impact from being involved in sustainable travel initiatives

- Businesses known to be engaged have been asked a further question (Q9) in order to gauge their perception of if or to what extent being engaged in the programme has had on their performance.
- The findings are consistent with the comparisons made earlier in paragraph 5.5, i.e. engagement in the programme has made *some* impact on the overall performance of this group of businesses.

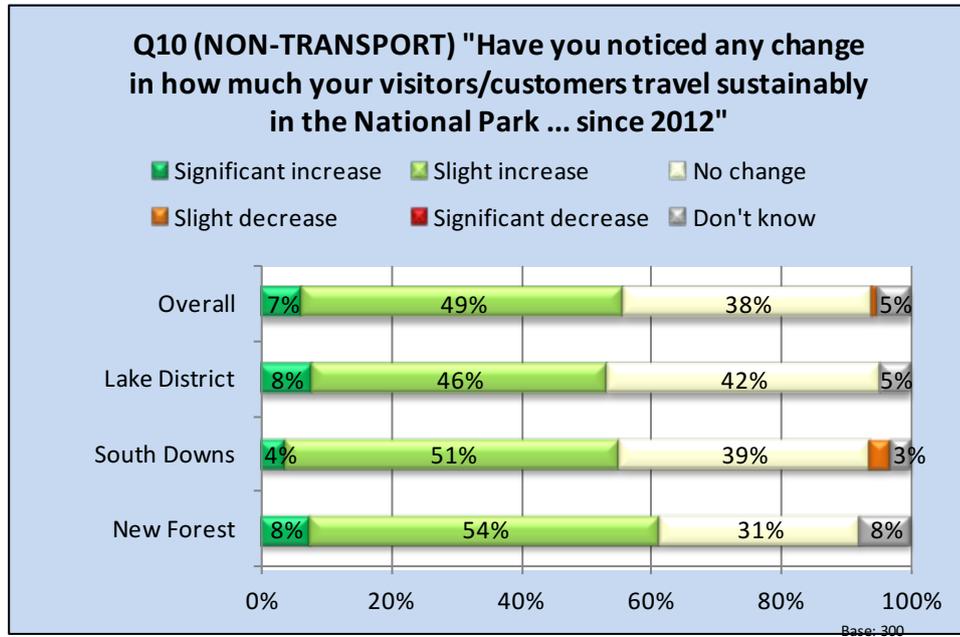
“We are certainly getting people down from London, numbers of visitors have increased. We are working with the Council and the National Park.”

Activity provider, New Forest

6. Questions Common to Engaged and Non-engaged Businesses

Here we discuss results for questions common to both groups of business in order to maximise the sample sizes so that comparisons between regions can be made.

Has visitor travel changed?

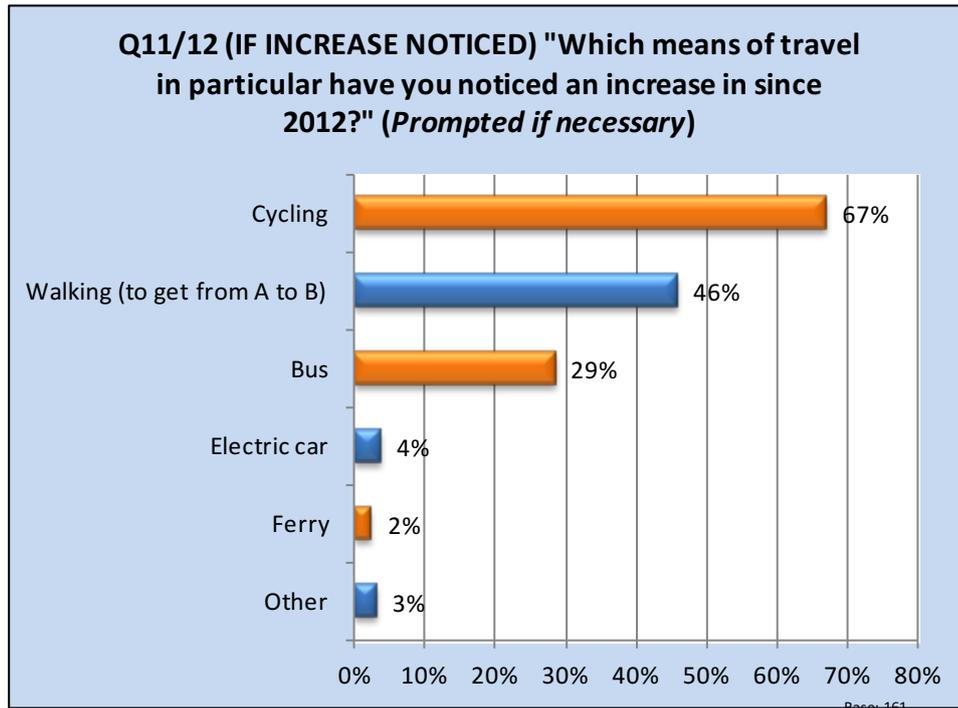


The chart shows the combined results from the engaged and non-engaged surveys. The question has not been asked to respondents in the transport sectors because they only see their customers travelling sustainably.

Slight overall increase in sustainable travel noticed, but not significant

- Just over half (56%) of respondents say they have noticed an increase in how much their customers travel sustainably in their National Park since 2012; most of these (49% of the 56%) say the increase is 'slight' rather than 'significant'. The results for the three National Parks are similar.

What has changed?



Travelling on two wheels

- The most noticed increased mode of sustainable transport is the bike. Two thirds (67%) of respondents state that this means of getting around has increased. This is especially the case in the New Forest (74% of respondents have noticed cycling increasing) and the Lake District (70% of respondents).

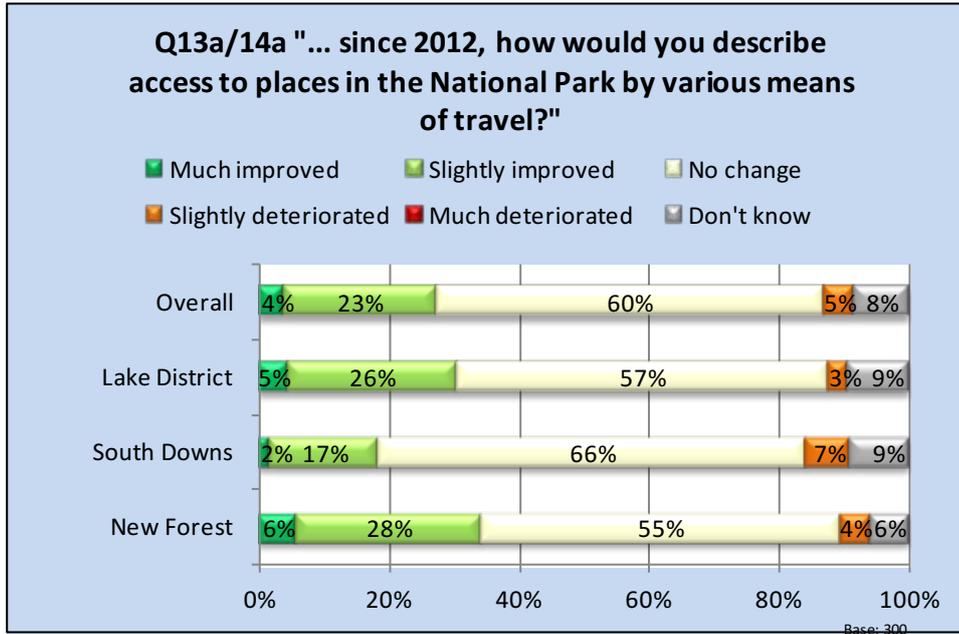
Bus rides through the New Forest

- The New Forest has promoted the use of the open top bus (New Forest Tour), and this shows in the results. Half (48%) of respondents to the above question in the New Forest say they have noticed more people travelling by bus.

Travel by most means of transport yet to increase significantly in the South Downs

- Respondents in the South Downs have seen increases in cycling (57% of respondents) and walking (57%), but significant increases in usage of motorised sustainable transport appear not to have been noticed yet.

Has access to places in the National Parks improved?



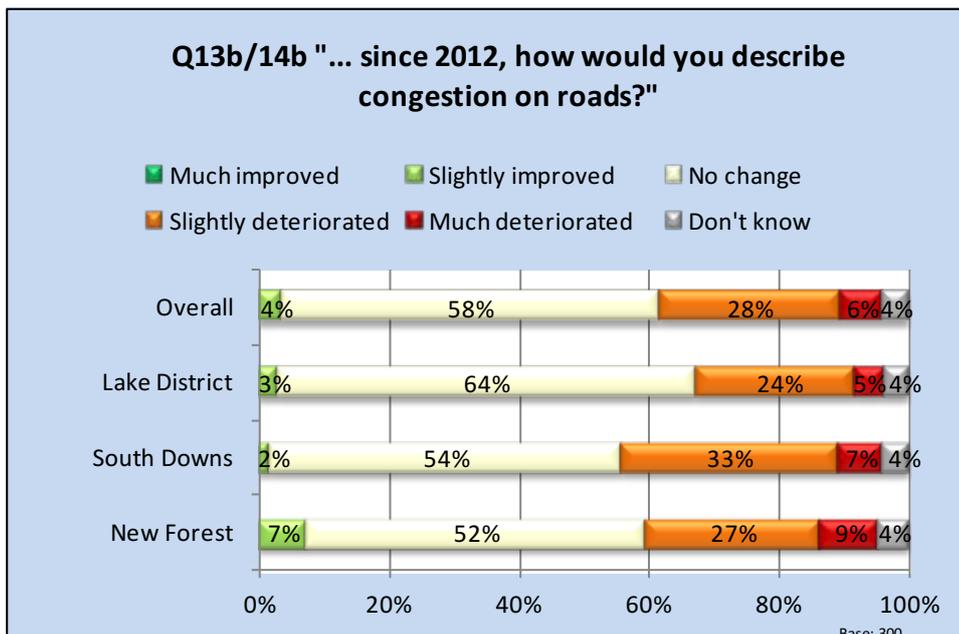
Slight improvement in access, but not significant

- Overall, about a quarter (27%) of respondents describe access to places in their National Park by various means of travel as improved; however most of these (23% of the 27%) describe the improvement as 'slight' rather than 'significant'.

Improvements more noticeable in the New Forest and the Lake District

- Following on from earlier comments, businesses in the New Forest and the Lake District are noticing improvements more than businesses in the South Downs.

Has congestion on roads improved?



This is why sustainable transport programmes are needed

- Very few (4%) respondents have noticed any improvement in congestion on roads in their National Park since LSTF began in 2012, and many (34%) say congestion has got worse. Without LSTF it is probably fair to say that congestion could have deteriorated even more, and the results highlight why programmes to encourage sustainable travel in the National Parks are necessary for the long term.

What do the customers think?

- All businesses (engaged and non-engaged) have been asked an open question on what feedback they have had from customers who have used sustainable travel services in the National Park. Here we discuss the main themes.

High praise for the New Forest Tour bus

- Users of the New Forest open top tour bus have talked enthusiastically about their experience of using it. This leads to positive comments about sustainable travel in the New Forest generally.

“Customers have really enjoyed the tour bus. People can’t get enough of it.”
B&B, New Forest

“Tour bus is brilliant”
B&B, New Forest

“People say how good the travel services are in the area”
Self catering, New Forest

“Love it – not one bit of negative feedback”
Attraction, New Forest

People enjoy using new means to get around

- Many visitors have given positive feedback about their experiences of travelling around sustainably, whether on foot, on a bike or on a bus. Not having to drive themselves around and find places to park appears to be a relief for some visitors.

“It was nice to do, don’t have to park”
Activity provider, New Forest

“The bus services have good links and people are enjoying using the [electric] bike and also cycling”
Caravan park, Lake District

“It all seems very positive. A lot of people enjoy the electric bikes because they haven’t used them before and older people who haven’t ridden a bike in years.”
Self catering, Lake District

“Cycle routes are great, really enjoying getting around on the bikes”
B&B, New Forest

Don’t knock me off

- Some visitors who have cycled in the National Parks would welcome a safer experience by having more dedicated cycle paths or lanes.

“The roads need to be safer for cyclists”
Retailer, Lake District

Bus services are expensive or infrequent

- Some visitors have commented that bus services are expensive or not frequent enough, especially outside of the peak summer season.

“The buses are too expensive and in the off season the service is not frequent enough”
Activity provider, Lake District

“The main feedback we get from people is that the buses are too expensive. People would be happy to use their cars less if it was cheaper.”
TIC, Lake District

“They [customers] all thought we could benefit from a better bus service”
Hotel, New Forest

“We need a better bus service in the area, it is so poor. If people don’t have a car, they can’t get to us.”
Hostel, South Downs

Electronic bike network (EBN) needs to be more extensive

- Some visitors to the Lake District have commented that the electric bike network is sparse and so they have to ride for long distances at a time.

“With the EBN it’s too sparse an area. If there were more journeys over a short distance, people could use them more, but it’s a significant commitment. You would have to be cycling all day.”
Attraction, Lake District

What could be done better?

- Businesses have been asked what they think could be done better in future. Here we discuss the main themes.

Lower bus prices and more frequent services

- Many comments have been made about the price of travelling by bus or the frequency of services if the bus is going to compete seriously with the car as the preferred means of transport.

“The bus costs so much money, it is just not worth using. It costs £10 return just to go 20 miles, so that is not sustainable.”
Self catering, Lake District

“I think it is strange that they only operate the tour bus through the holidays. It is very popular but it needs to operate most of the year.”
B&B, New Forest

“I think the bus services need to change. The last bus is at 7pm and only every hour.”
Hotel, New Forest

Mixed messages in the South Downs

- In the South Downs there appears to be a particular problem with bus services being cut at the same time that initiatives such as LSTF are trying to encourage people to travel that way.

“Cutting funding for bus routes which doesn’t make sense if they are trying to encourage sustainable travel”
Attraction, South Downs

Tell us when the buses are running

- Some businesses want clearer information on bus timetables so they can pass this onto their customers.

“If we got the leaflets delivered to us – bus routes and timetables – that would be much appreciated and it helps the guests a lot”

Hotel, Lake District

“More information – there’s a bus route right in front of our farm but we don’t know where to get a bus schedule”

Campsite, South Downs

Realistic approach required for the long term

- Some respondents recognise that promoting alternatives to the car is not an easy task and it will take a lot of investment over a long period of time to make a significant difference.

“It needs to be done in a sensible way, e.g. you can’t just tell people they can’t drive their car through the forest, you have to have a soft approach”

Hotel, New Forest

“I think it is just a long term game. Short term projects don’t work.”

Hotel, Lake District

“To compete with the car, it’s not enough to support alternatives for one year, you have to keep it going”

Bus company, South Downs

More cycle paths needed

- For cycling to become more attractive, visitors need to feel safe on a bike, and this may mean significant investment in cycle paths and lanes. Some also comment that this shouldn’t be to the detriment of other traffic already on the roads though.

“Cycle lanes are important – but don’t let it restrict the flow of traffic”

Attraction, South Downs

Let’s work together

- Organisations and businesses offering sustainable travel need to continue working together to integrate what they offer visitors.

“I think everyone like attractions, bus companies etc should work together for things like special offers”

Attraction, New Forest

“Making sure different methods of travel are integrated – such as bus services that interlink with the train service – for example when the bus arrives, the train is waiting to take the passengers to the next destination”

Attraction, Lake District

7. Conclusions

- Here we finish with conclusions from the research and implications for similar future initiatives.

Businesses don't so much need *convincing*, more *informing* about what they can do

- Businesses generally seem quite willing to 'do their bit' in maintaining their natural surroundings. Most appear not to need convincing about *whether* they should be getting involved, rather they need to know *how* they can be involved.

It's not as arduous as they think

- Operators unaware of what they could do to help seem to think that getting involved in a programme requires a major time commitment on their part, and therefore they don't look into it. They don't appear to realise that some of the easiest ways to be involved such as passing on information to their customers are also among the most effective.

The case for improved business performance?

- Engaged businesses appear to have performed better since 2012 than non-engaged businesses. However, it is important this is put into the wider context that there are many other factors influencing performance beside the LSTF programme, and engaged operators are naturally more pro-active in how they run their business.
- In any case, evidence of improved businesses performance is not a significant motivator in getting more businesses engaged. Making businesses more aware of how easily they could get involved in effective activity will be more influential in encouraging them to do what they naturally feel inclined to get involved with.

Success story in the New Forest

- Feedback throughout the research from New Forest businesses is highly positive. The open top tour bus and beach bus services appear to be particularly successful. The challenge is keeping that going and in providing such services off-peak when it is harder to do so, and at a price which is acceptable to users.

Established services in the Lake District, with some improvements needed

- The Lake District appears to do a lot of things well, having been established in the LSTF programme for longer. Cycle hire and bus services appear to be working well. The challenge is to reach the more remote appears with bus services where the demand is sparser, at an acceptable price.
- The electric bike network has caused frustrations with some businesses and this has hindered its development.

South Downs businesses yet to see improvements to the same extent as in the other National Parks

- Businesses in the South Downs are not noticing improvements as much as businesses in the other National Parks, and part of the reason appears to be conflicting public sector policies. Businesses report that at the same time as LSFT being introduced to encourage more visitors to travel sustainably, Councils are going the opposite way by cutting funding for bus services.

More cycle paths and lanes needed

- Cycle hire has been taken up well in all the National Parks, but cycle path and lane development appears not to have kept up with the increase in cyclists. The cycling experience would improve if visitors felt safer on a bike.

Visitors are enjoying themselves

- One of the most positive findings from the research is that visitors who travel sustainably appear to enjoy themselves in doing so. Riding a bike has become a novelty again, and riding an electric bike is even more of a novelty.
- Buses are very effective when services are well run and reasonably priced, as visitors can view the scenery at their leisure and not have the stress of either battling through traffic or finding somewhere to park.

ANNEX C

Sustainable Transport User Analysis

▶ EXECUTIVE SUMMARY

- The Sustainable Travel Choices User Survey was promoted as both a paper and web survey between March and the end of November 2014. There were 843 completed paper surveys and 580 completed online - 1,423 in total.
- The sample was split with 978 completed by Lake District visitors, (69%), 277 for the New Forest (20%), and 156 in the South Downs (11%).
- 45% of respondents were male and 55% female - representative by gender of the national population.
- 21% of the overall sample were local residents, 29% day visitors, 28% visitors staying within the National Park and 8% staying, but outside of the National Parks. Both the New Forest and South Downs samples had more local residents, while the Lake District had the highest proportion of staying visitors.
- 80% of groups were adult only, and just 20% included children. Average party size was 2.5 people. The New Forest had the largest party sizes and the highest proportion of groups including children. Bus passengers were more likely to be adult only, at 84% of groups. Cyclists and train travellers had the smallest party sizes.
- 44% of people were visiting with their partner or spouse, and 19% were alone. 26% were with family, and 15% with friends. In the Lake District, visitors were slightly more likely to be with partners/spouses, visitors in the New Forest slightly more likely to be with family members, and those in the South Downs more likely to be with friends.
- Visitors using sustainable transport in the National Parks were more likely to be in the 45-69 year age groups - partly a reflection of the visitor profile in general.
- 83% of visitors had made previous visits to the National Parks - as is commonly found for these destinations. 17% were first time visitors. Train travellers were most likely to be first time visitors - 23% were new to their destination.
- Aside from walking, the majority of respondents had travelled by bus (42%), with a quarter using the train. 15% had been on a boat/ferry, 12% had been on an Open Top bus Tour, and 11% had cycled.
- People were asked to estimate how many miles they would have travelled by car had they not chosen sustainable transport. 830 people provided estimates, totalling 54,662 car miles saved, and 65.9 miles on average. Carbon reduction was highest in the Lake District, at 84.6 car miles saved on average, and also for those choosing train travel, at 152.2 car miles saved on average.
- People were asked how they had heard about their sustainable travel choice. Many people had not needed specific marketing, as they either already knew about it (36%) or had used it before (33%). 21% found out via a website, 19% a leaflet, and 14% via word of mouth. Bus passengers were more likely to have seen a leaflet (25%) and train travellers were more likely to have seen information on a website (30%).

- The most prevalent motivations were to do with experience - 49% for a more enjoyable way to get around, and 45% so they were better able to enjoy the views. 38% wanted to leave their car behind, 32% were motivated by environmental benefits, and 31% wanted the exercise.
- In the Lake District, people were more likely to say it was to do a linear walk and travel to the start/back from the end (19%). In the New Forest, a higher proportion of visitors chose their transport for a more enjoyable way to get around (57%), for the fresh air (45%), for a new experience (40%), and to be better able to enjoy the views (42%). In the South Downs, visitors were more likely to choose sustainable travel for the exercise (49%), and for fresh air (46%).
- Walkers were motivated more by exercise (43%) and fresh air (44%). Cyclists were motivated more by an enjoyable way to get around (62%), as well as exercise (63%) and fresh air (56%). People using water buses/ferries were more likely to say they chose that option for a more enjoyable way to get around (61%), to be better able to enjoy the views (55%), for fresh air (49%) and for a new experience (31%). Bus passengers were more likely to have chosen the bus to save money (33%), and to be better able to enjoy the views (53%). Train travellers were more likely to have chosen the train out of necessity because they didn't have access to a car (36%).
- People were asked how often they used their sustainable travel choice. 8% were doing so for the first time - maybe being on a leisure trip made them more open to the idea of sustainable travel. New Forest visitors were more likely to be trying their choice of sustainable travel for the first time (18%), and visitors to the South Downs were more regular users of sustainable transport in their daily lives - 65% using regularly at home. Cyclists were more likely to also cycle regularly at home.
- Visitors were asked how they found their experience of using sustainable transport. Results were extremely positive, with 94% of visitors giving their experience a positive rating, up from 89% in 2013. 63% said it was 'very good' and another 31% rated it as 'good'.
- Visitors were then asked if their behaviour would change as a result of their experience - would it make them more likely to travel sustainably? For 20% there would be no change. However, 61% of all visitors said they would definitely be more likely to choose this travel choice again on holidays, and 36% said they would definitely be more likely to use their travel choice even when back home.
- Cyclists were particularly likely to change their travel choices in a positive way after having experienced cycling while on holiday. A significant 70% said their experience would definitely make them more likely to choose sustainable travel on holidays, and 48% definitely at home.
- The most significant triggers of behavioural change lie in more **convenient**, **cheaper**, more **frequent**, and **accessible** sustainable travel choices. This was true across all areas, and echoes results from 2013. For cyclists, **health** was an important motivator, coming just behind convenience.
- Average daily spend for people staying overnight within the National Park boundaries was £42.22 per day and for day visitors £22.10 - these figures are up on 2013 by 12% and 19% respectively.
- By area, on average Lake District visitors spent more, and New Forest visitors spent less. Across transport modes, boat/ferry users and train travellers were the most valuable. Walkers and cyclists staying overnight also spent more than across the overall sample, but the cyclists' daily spend was -9% less on average.

› **1. METHODOLOGY**

› **1.1 Introduction**

Local Sustainable Transport Fund (LSTF) Visitor Travel Case Study: *how to develop visitor travel to optimise economic benefit and carbon reduction*

This Department for Transport funded project has been led by Cumbria Tourism (and the Lake District National Park Authority), and focuses on the evaluation of LSTF funded projects in the Lake District National Park (branded as GoLakes Travel), and those in the New Forest and South Downs (England's two newest National Parks).

The Local Sustainable Transport Fund (LSTF) was launched by the Department for Transport in 2010 to assist Local Authorities in implementing transport schemes that support economic growth while reducing carbon emissions. Only a small number of LSTF funded projects focus on visitor travel. Visitor travel – and especially how to change visitors' travel behaviour – is poorly understood in comparison to other travel types, such as the journey to work and school, or travel for routine journeys in urban areas.

The LSTF programmes in the three National Parks have implemented a series of innovative sustainable transport schemes that preserve and enhance the economic viability of the National Parks, while reducing the negative impact of visitor travel. These include schemes such as improved cycle networks and cycle hire, new and improved bus services, electric car hire, and marketing and information resources.

The Visitor Travel Case Study provides the first major opportunity to understand how visitor transport and travel contributes to the rural economy, and to learn how best to change visitor travel behaviour to maximise carbon reduction.

There are four main strands to the research activity for the Case Study:

- 1. Project (and Carbon Reduction) Monitoring**
- 2. Visitor Surveys**
- 3. User Surveys**
- 4. Business Surveys**

This report is the 2014 analysis of strand 3, the Sustainable Travel Choices User Survey.

1.2 Design

This research was aimed at visitors who had chosen to travel sustainably and as such had direct experience of using LSTF funded project initiatives, e.g. people who had hired bikes or cars, or taken bus transport, or train travel.

The questionnaire was designed to track:

- visitor profiles
- awareness and perceptions of sustainable travel choices
- experience and feedback
- propensity to use sustainable travel options
- travel habits/changes
- triggers of behavioural change
- opportunities to maximise beneficial travel behavioural change
- spending patterns

A paper version of the survey was professionally designed and printed as an A4, foldable, self-complete survey which could be sealed and returned by freepost direct to Cumbria Tourism.

9,000 copies were printed and distributed to project managers in the Lake District, New Forest and South Downs National Parks in time for the Easter holidays. (A copy of this forms appendix three). An interviewer version was also created to allow for face-to-face surveys.

In addition, an online version of the survey was created and the link made available for promotion from March 2014. An prize draw of £100 was offered as an incentive to complete surveys.

1.3 Distribution

Paper survey distributed included:

Lake District:

- on Windermere ferry
- during the Summer Celebration of Cycling 22 July
- using volunteer services on bus routes 516, 505, 800 and X33
- via Mountain Goat minibuses
- via Stagecoach and Alba
- at key transport interchanges
- via Skyride, Cycloan, and on key cycle routes
- on the Lakes Line for train travellers
- at points of hire for PAYD cars and Twizys
- via Cumbria Tourism's e-newsletter, sent to over 157,000 visitors at the end of the visitor season

New Forest:

- web survey link included in 70,000 Freedom of the Forest visitor travel guide available at tourist attractions, outlets and accommodation in the area
- via four cycle hire operators
- via the three local bus depots and their buses (including the New Forest Tour and the Beach Bus)
- via Hire a Twizy
- given out along with tailored travel advice by the New Forest Travel Concierge service at Brockenhurst station which receives walkers, cyclists, train travellers and New Forest Tour customers
- promotion through social media channels of transport products e.g. the New Forest Tour
- through face-to-face interviews during September
- during the Walking Festival in October half term

South Downs:

- via Community Rail partners
- via bus operators on key routes
- at key events where there were opportunities to arrive by sustainable transport
- through face-to-face interviews during September

The survey closed at the end of November 2014. There were 843 completed paper surveys and 580 completed online - 1,423 in total.

All surveys are subject to some degree of statistical error. The size of this error varies with the sample size, population size and strength of response. The table below shows a range of sample sizes, and the margins within which there is 95% certainty (confidence) that the figures will be true if the sample is a random one. For example, if you have a sample size of 500, and 80% of them answered 'yes' to a particular question, statistical reliability would be ± 3.5 which means you could be confident that any repeat of the survey would generate between 76.5%-83.5% 'yes' answers.

Statistical Reliability					
Sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
500	± 2.6	± 3.5	± 4.0	± 4.2	± 4.4
400	± 2.9	± 3.9	± 4.5	± 4.8	± 4.9
250	± 3.7	± 5.0	± 5.7	± 6.1	± 6.2
100	± 5.9	± 7.8	± 9.0	± 9.6	± 9.8
50	± 8.3	± 11.1	± 12.7	± 13.6	± 13.9

A sample of 1,423 produces answers at a 95% confidence level that will be accurate to $\pm 2.6\%$ or better. In the market research industry, it is generally accepted that an error level of around $\pm 5\%$ is satisfactory for reliable and robust results. This sample is well within those limits and so would be considered statistically robust.

▸ The sample was split with 978 surveys completed by Lake District visitors, (69%), 277 for the New Forest (20%), and 156 for the South Downs (11%). 12 people did not indicate their location.

2. RESULTS

2.1 Visitor Profile

Gender

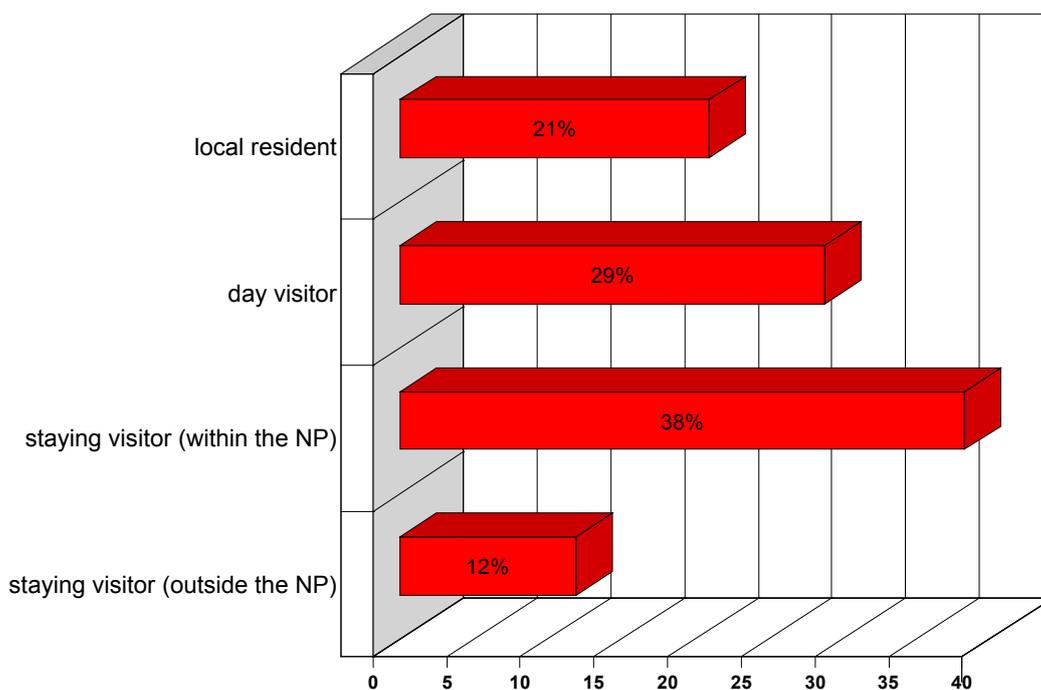
45% of respondents were male and 55% female. This is extremely close to the national population split of 48% male and 52% female, suggesting the sample is representative by gender.

In the New Forest the sample was skewed more towards women (as it was in the 2013 survey), with 63% female respondents.

By transport mode, cyclists and bike bus passengers were more likely to be male (62% and 59% respectively), while people travelling by ferry and on an Open Top Tour bus were more likely to be female (63% and 66% respectively).

Origin

In 2013, 34% of the overall sample were local residents, 30% day visitors, 28% visitors staying within the National Parks and 8% staying, but outside of the National Park boundaries. In 2014 more visitors were surveyed, breaking down to 21% local residents, 29% day visitors, 38% visitors staying within the National Parks and 12% staying, but outside of the National Park boundaries.



However, this masks significant differences by area. Both the New Forest and South Downs samples had more local residents (33% and 41% respectively), while the Lake District had the highest proportion of staying visitors (49%). The South Downs sample had the highest numbers of day visitors at 44%.

Bus passengers were slightly more likely to be local residents (26%), while the opposite is true for those using water buses or ferries (the majority of these in the Lake District), where just 4% were local residents. People travelling by train were slightly more likely to be day visitors (33%).

Party Size

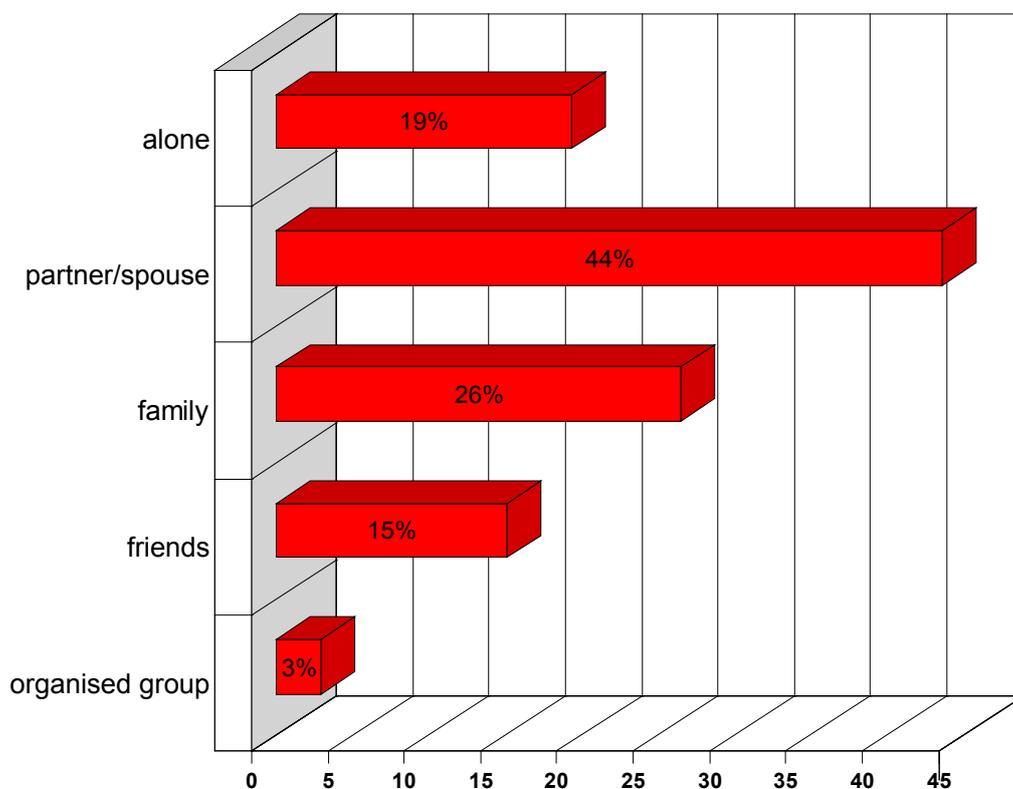
Between them, the 1,423 people responding to the survey represented 4,208 visitors to the National Parks. Largest party sizes were found with organised groups. 80% of groups were adult only - 20% included children. Average party size was 2.5 people.

The New Forest had largest average party sizes at 2.7 people, and also the highest proportion of groups that included children, at 26%.

By mode, largest group sizes were boat/ferry users, and bus passengers at 2.7 people on average, and smallest groups for cyclists and train travellers (2.3 and 2.4 people per party respectively). Bus passenger groups were more likely to be adult only (84%).

Party Profile

44% of people were visiting with their partner or spouse, and 19% were alone. 26% were with family, and 15% with friends. (NB this was a multiple response question and so figures will exceed 100%).



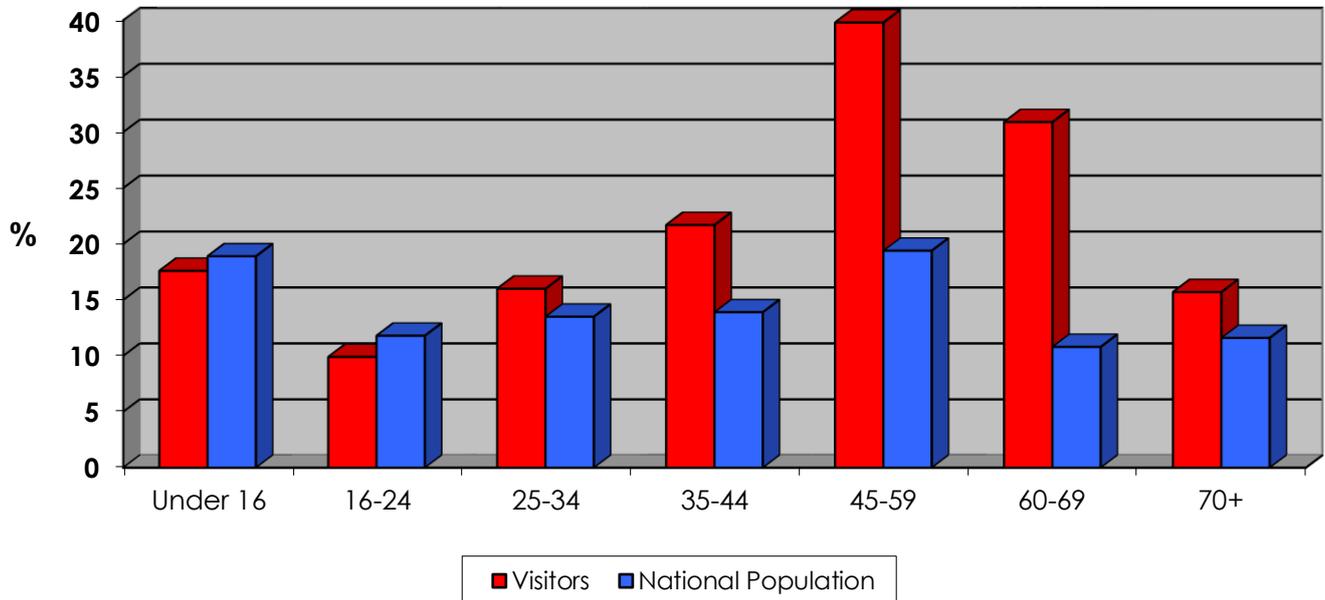
Profiles varied by area. In the Lake District, visitors were slightly more likely to be with partners/spouses (47%), visitors in the New Forest were slightly more likely to be with family members (31%), and those in the South Downs were less likely to be with partners/spouses (28%) and more likely to be with friends (31%).

Cyclists were more likely to be with family members (33%) and water bus/ferry users more likely to be with partners and family members (54% and 37% respectively). Bus passengers were slightly more likely to be on their own (24%).

Age Group

The graph below shows the age profile of visitors (all in party) in comparison to the national population profile.

Visitors using sustainable transport in the National Parks were more likely to be in the 45-69 year age groups - partly a reflection of the visitor profile in general.



Source: Census mid-2011 Estimates (UK) Office for National Statistics

Visitors to the New Forest were more likely to be in the youngest, or oldest age groups, whereas in the South Downs, visitors were more likely to be between the ages of 25 and 44 than in other areas.

Reflecting a more family-oriented profile, there were more under 16s, and 35-59 year olds in the cyclists groups. Water bus/ferry users a, while train travellers were less likely to be over 60 years of age.

Visit History

83% of visitors had made previous visits to the National Parks - as is usually found for these destinations. 17% were first time visitors - an increase on 14% in the 2013 survey.

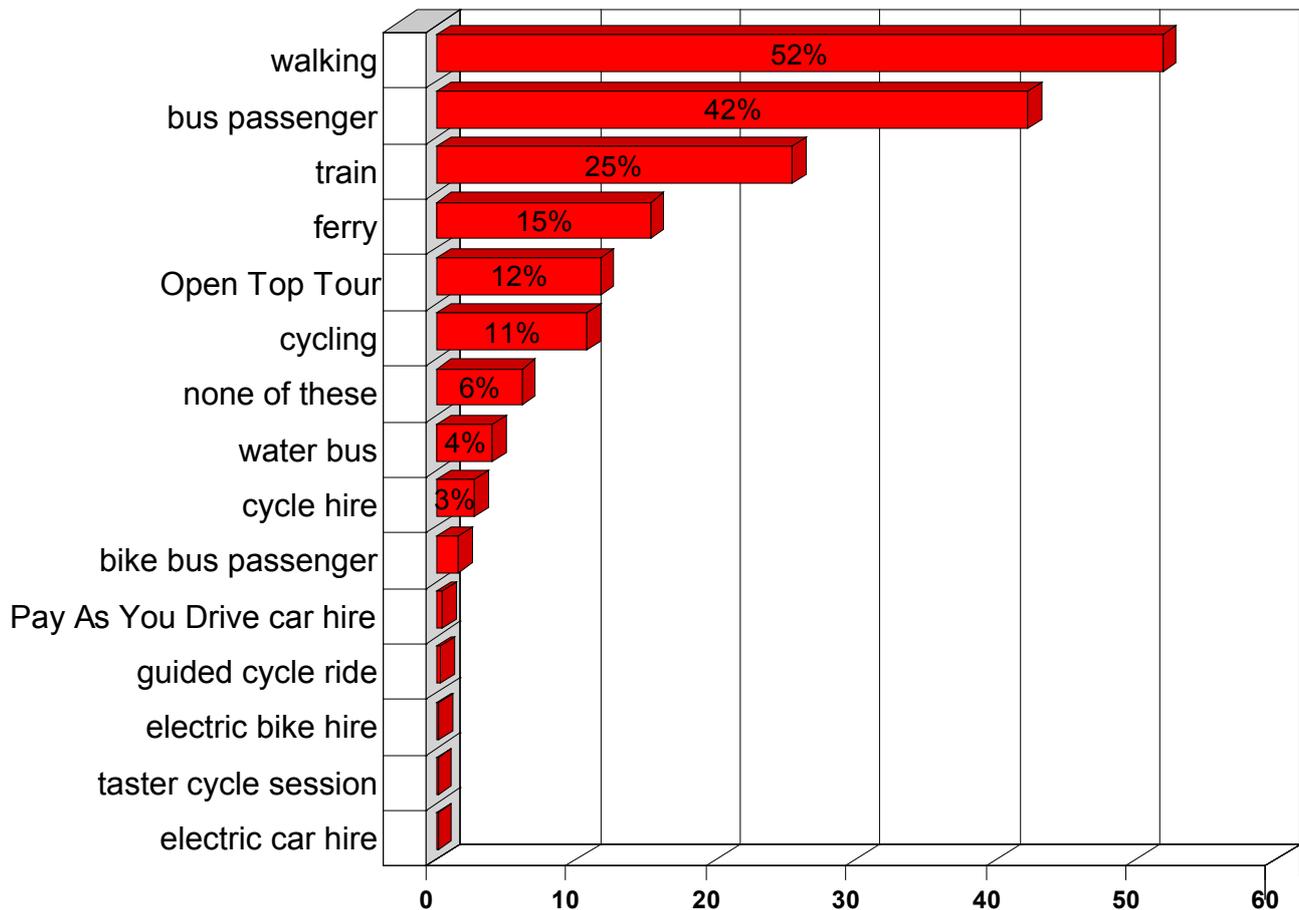
There was little variation by area, but by transport mode, train travellers were most likely to be first time visitors - 23% were new to their destination.

2.2 Travel Choices

Transport Mode

The majority of respondents had travelled on foot (52%), with 42% bus passengers and a quarter using the train⁵⁴. 15% had been on a ferry and 12% on an Open Top bus Tour. 11% had cycled.

NB Some people used more than one sustainable travel choice. Others noted themselves down more than once - for example saying they were a bus passenger, and also ticking the option of Open Top Tour.

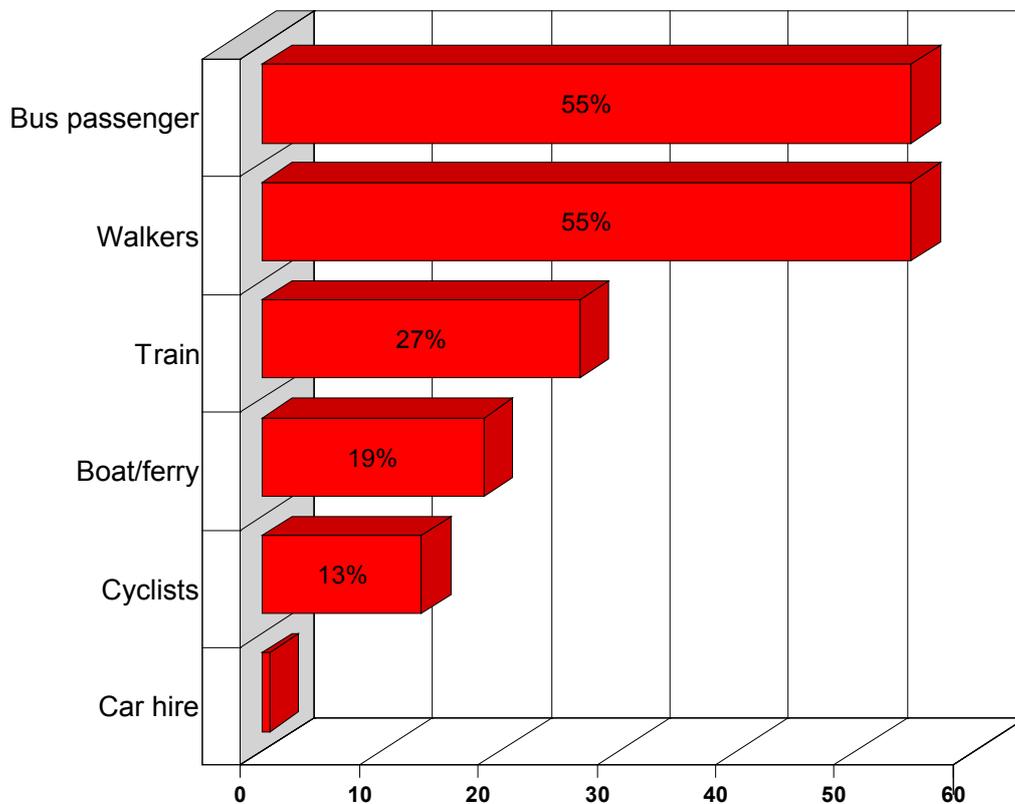


There was significant variation by area, which would be expected as in each National Park the LSTF projects, and therefore available options, are quite different.

In the Lake District, there were slightly more walking (56%), on the bus (48%) and on the train (30%), and the ferry was more significant, used by 19% of the sample. In the New Forest, there were fewer walkers (38%), general bus passengers (32%) and train travellers (12%) but there were far more on Open Top Tours at 35%. In the South Downs there were fewer bus passengers (28%) and rail users (19%) but more cyclists (17%).

⁵⁴ Walking and general cycling were both introduced as new options for the 2014 survey.

By grouping transport modes together (for example combining bus passengers and Open Top Tour bus travellers, and cycling with cycle hire, guided cycle rides, taster cycle sessions and electric bike hire), walkers and bus passengers are most common, at 55% of the sample. 27% travelled by train, 19% on a water bus, boat or ferry, and 13% were cyclists.



Carbon Reduction

People were asked to estimate how many miles they would have travelled by car had they not chosen sustainable transport.

In 2013, 472 people provided estimates, totalling 24,630 car miles saved, and 52.2 miles on average. In 2014, 830 people provided estimates, totalling 54,662 car miles saved, and 65.9 miles on average.

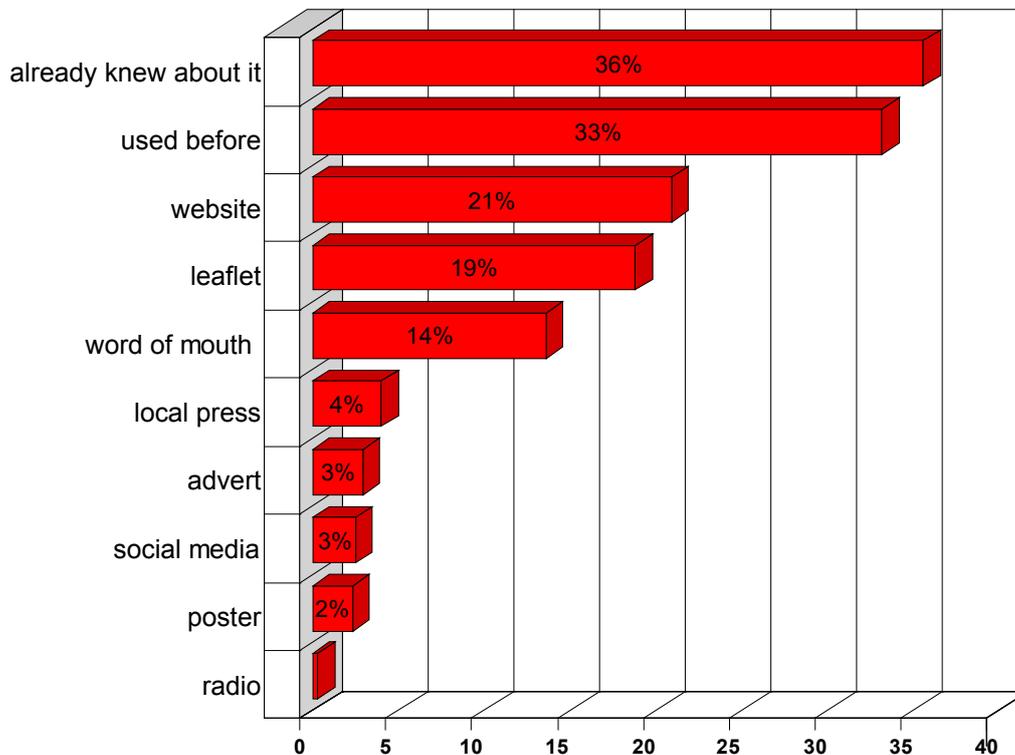
Carbon reduction was highest in the Lake District, at 84.6 car miles saved on average, and also for those choosing train travel at 152.2 car miles saved on average (primarily due to train trips to arrive to the destination).

Marketing

People were asked how they had heard about their sustainable travel choice.

Many people had not needed specific marketing, as they either already knew about it (36%) or had used it before (33%).

21% found out via a website (up from 18% in 2013), 19% from a leaflet (up from 15% in 2013), and 14% via word of mouth. 4% had seen something in the local press.



Others mentioned seeing information at the bus stop, bus timetables, on the back of buses, or at Tourist Information Centres.

In the New Forest, people were more likely to have found out from a leaflet (28%), and less likely to have used the transport before (22%),

In the South Downs, people were more likely to have heard through word of mouth (20%) or from previous use (45%), but less likely to have seen a leaflet or website.

Water bus/ferry users were more likely to have seen a leaflet (29%) or website (28%), and less likely to already known about them or used them before.

Bus passengers were more likely to have seen a leaflet (25%) and train travellers were more likely to have seen information on a website (30%).

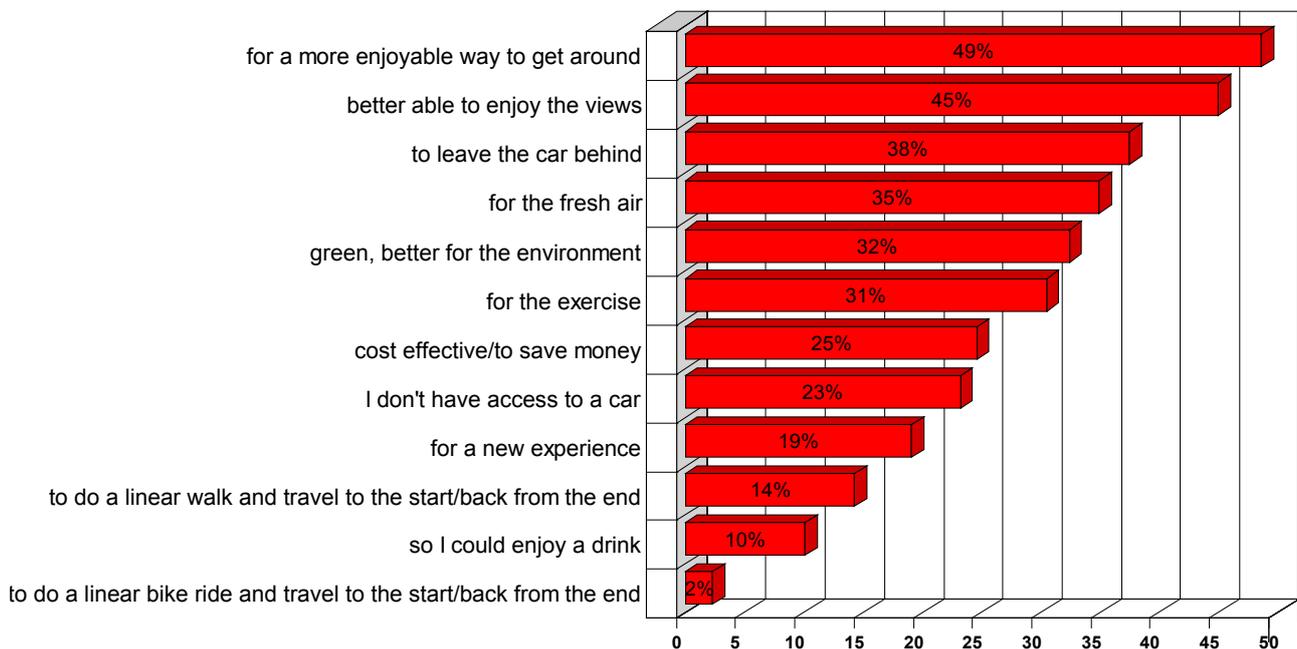
Motivation

People were asked why they decided on their sustainable travel choice. This was a multiple choice question.

The most prevalent motivations were to do with experience - 49% for a more enjoyable way to get around and 45% so they were better able to enjoy the views.

38% wanted to leave their car behind, 35% wanted fresh air (up from 24% in 2013), and 32% were motivated by environmental benefits (up from 29% in 2013). 31% wanted the exercise (up from 19% in 2013), and a quarter either didn't have a choice as they had no access to a car, or wanted to save money.

19% were looking for a new experience (up from 16% in 2013).



Other reasons included convenience, ease, and for less stress.

There were differences by area. In the Lake District, people were more likely to say it was to do a linear walk and travel to the start/back from the end (19%). In the New Forest, a higher proportion of visitors chose their transport for a more enjoyable way to get around (57%), for the fresh air (45%), for a new experience (40%), and to be better able to enjoy the views (42%). In the South Downs, visitors were more likely to choose sustainable travel for the exercise (49%), and for fresh air (46%), and less likely to have done so to just leave the car behind (26%), for a more enjoyable way to get around (36%) or to be able to enjoy the views better (30%).

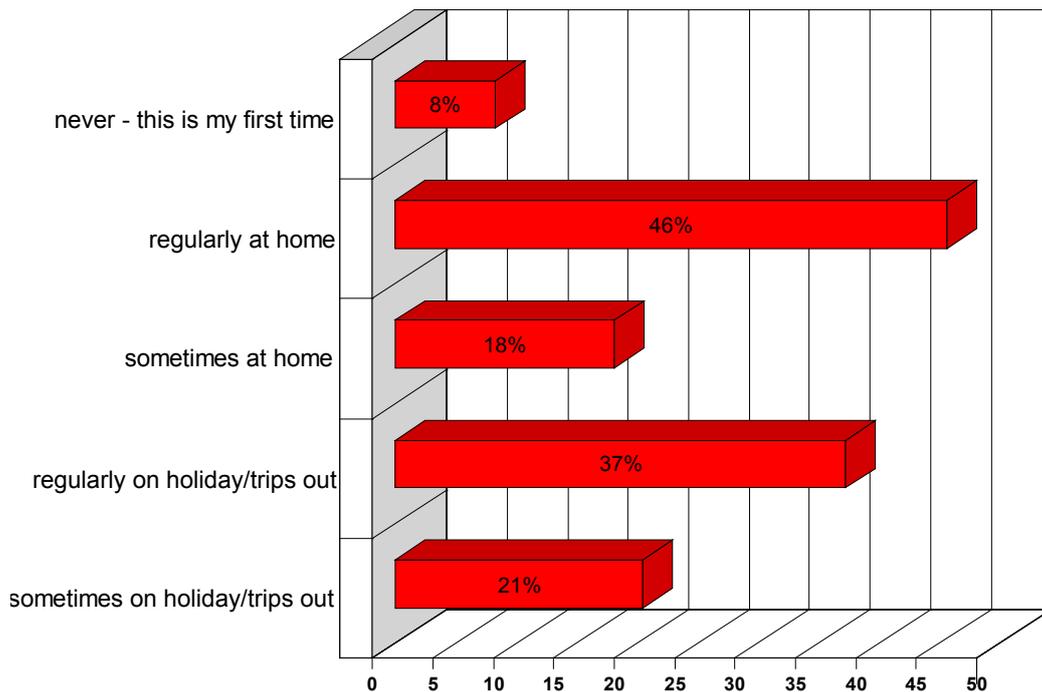
There were also differences by mode. Walkers were motivated more by exercise (43%) and fresh air (44%). Cyclists were motivated by a more enjoyable way to get around (62%), as well as exercise (63%) and fresh air (56%). People using water buses/ferries were more likely to say they chose that option for a more enjoyable way to get around (61%), to be better able to enjoy the views (55%), for fresh air (49%) and for a new experience (31%). Bus passengers were more likely to have chosen the bus to save money (33%), and to be better able to enjoy the views (53%). Train travellers were more likely to have chosen the train out of necessity because they didn't have access to a car (36%).

Frequency of Use

People were asked how often they used their sustainable travel choice. 8% were doing so for the first time - perhaps being on a leisure trip made them more open to the idea of sustainable travel.

Almost half the group use sustainable transport regularly at home, and 18% sometimes at home.

37% use sustainable transport regularly on holiday/trips out, and 21% sometimes.

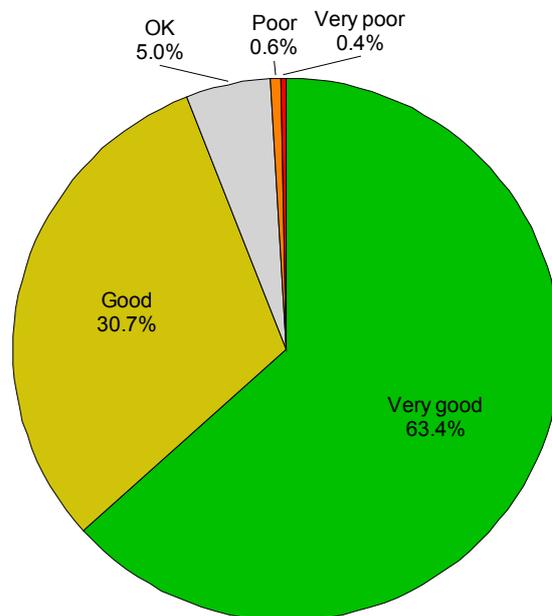


New Forest visitors were more likely to be trying their choice of sustainable travel for the first time (18%), and less likely to choose sustainable travel regularly on holiday or trips out (25%). Visitors to the South Downs were more regular users of sustainable transport - 65% use it regularly at home, and 51% regularly on holiday or trips out.

There was less variation by transport mode. Cyclists were more likely to also cycle regularly at home (55%). Visitors travelling on boats and ferries were less likely to do that at home (30%).

Satisfaction

Visitors were asked how they found their experience of using sustainable transport. .



Results were extremely positive, with 94% of visitors giving their experience a positive rating (up from 89% in 2013). 63% said it was 'very good' and another 31% rated it as 'good'. 5% thought it was just 'ok', and 1% gave a negative response.

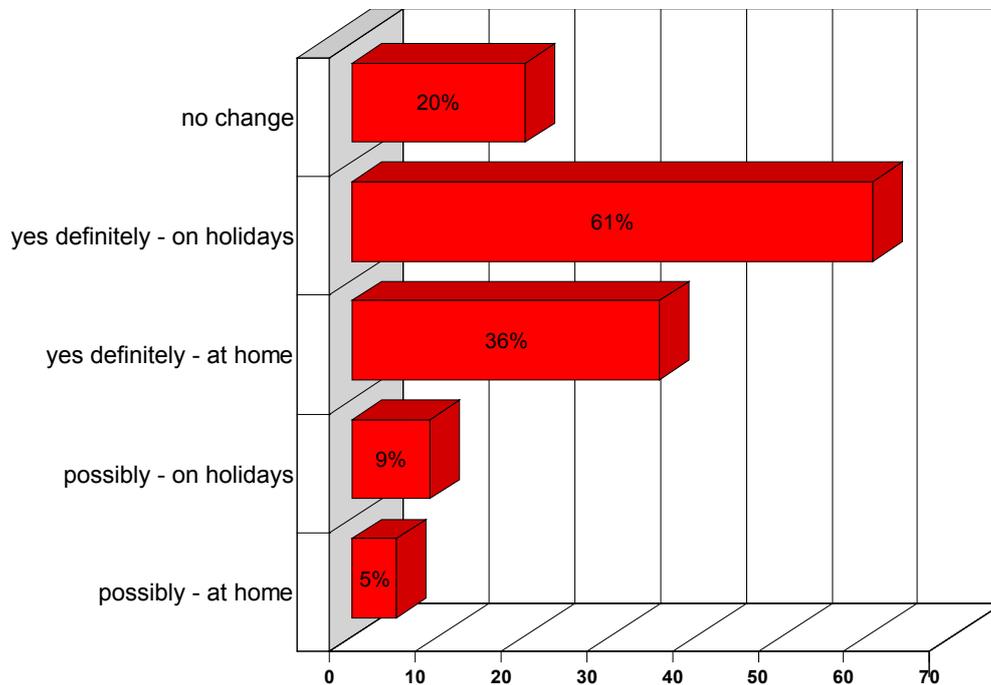
Visitors were asked for feedback. Full responses form appendix four, ordered by area and transport mode.

Overall, positive ratings were strong in all areas, at 94% for the Lake District, 96% for the New Forest, and 92% for the South Downs - although here visitors were less likely to give a 'very good' rating.

There was no significant difference by transport mode, except that boat/ferry travellers were most likely to rate their experience as 'very good' (75%).

Change in Frequency of Use

Visitors were then asked if their behaviour would change as a result of their experience - would it make them more likely to travel sustainably?



For 20% there would be no change (down from 28% in 2013). However, 61% of all visitors said they would definitely be more likely to choose this travel choice again on holidays, (up from 50% in 2013) and 36% said they would definitely be more likely to use their travel choice even when back home.

In the South Downs, visitors were less likely to change their travel behaviour - 44% said there would be no change, and just 39% said they would definitely be more likely to use sustainable transport on holidays, compared to 57% in the New Forest and 65% in the Lake District.

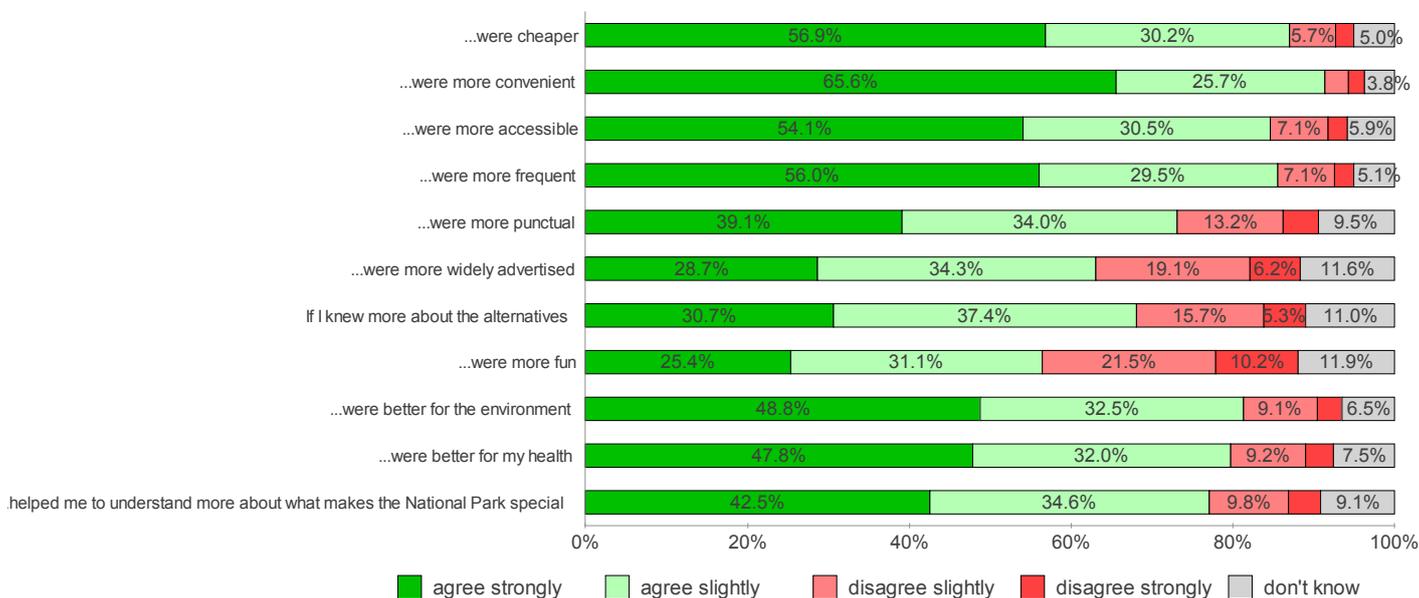
There were also some interesting differences by mode. Cyclists were very likely to change their travel choices in a positive way after having experienced cycling while on holiday. A significant 70% said their experience would definitely make them more likely to choose sustainable travel on holidays, and 48% definitely at home.

Water bus and ferry users were also more likely to change behaviour - just 8% said there would be no change to their behaviour, and 78% would definitely be more likely to use again while on holidays or trips out.

Triggers of Behavioural Change

Visitors were asked to what extent they agreed with a series of statements about alternatives to using a car, to identify which would motivate them to change their travel behaviour.

The question asked: “I would consider forms of travel other than my car if the alternatives.....”



The most significant triggers of behavioural change lie in more **convenient**, **cheaper**, more **frequent**, and **accessible** sustainable travel choices. This was true across all areas, and echoes the 2013 survey. In summary:

- 66% agreed strongly that more convenient alternatives would make them consider forms of transport other than the car
- 57% agreed strongly that cheaper alternatives would make them consider forms of transport other than the car
- 56% agreed strongly that increased frequency of alternatives would make them consider forms of transport other than the car
- Over half (54%) agreed strongly that better accessibility to alternatives would make them consider forms of transport other than the car
- Almost half (48-49%) strongly agreed that if the alternatives were better for the environment, or better for their health, they would consider them instead of the car
- 43% agreed strongly that if the alternatives helped them to understand more about what makes the National Park special, they would consider them instead of the car (up from 36% in 2013).

In the South Downs, alternatives being better for the environment, or for health (49%) marginally outweighed frequency, at 48%.

For cyclists, **health** was an important motivator, coming just behind convenience.

2.3 Spend

Visitor Spend

Visitors were asked how much their party would spend on their trip that day.

(NB this was not asked in the online version due to issues of recall).

831 visitors provided information on daily spend, representing 2,271 people. 265 of these were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£14,146	£20.12
Travel/parking costs to destination	£7,666	£3.38
Food and drink	£19,461	£8.57
Travel/parking costs at destination	£1,962	£0.86
Other leisure and recreation	£3,999	£1.76
Admission charges/visitor attractions	£3,439	£1.51
Other shopping	£6,790	£2.99
Shopping for daily needs	£3,530	£1.55
Any other expenses	£3,351	£1.48
TOTAL		£42.22

Average daily spend for people staying overnight within the National Park boundaries was £42.22 per day and for day visitors £22.10 - these figures are up on 2013 by 12% and 19% respectively.

By area, Lake District visitors spent more, with average staying visitor spend £47.14 and day visitor spend £26.85. In the New Forest, visitor spend was lower than across the overall sample, with staying visitor spend £31.98, and day visitor spend £20.99. In the South Downs, sample sizes are smaller and should be treated with some caution - but staying visitors spent more than average, and day visitor spend was lower.

Across transport modes, boat/ferry users and train travellers were the most valuable. Boat/ferry users staying overnight spent 36% more than average, and daily spend was two thirds higher. Train travellers staying overnight spent 20% more than average, and daily spend was around 50% higher than for the overall sample.

Walkers and cyclists staying overnight also spent more than across the overall sample, but the cyclists' daily spend was -9% less on average.

▶ **Appendix One: Results by Area**

▶
▶ There were 843 paper surveys completed and 580 web surveys. This was split by area as follows:

- ▶
- ▶ Lake District: 505 paper surveys, 473 web surveys = 978 total
- ▶ New Forest: 193 paper surveys, 84 web surveys = 277 total
- ▶ South Downs: 136 paper surveys, 20 web surveys = 156 total
- ▶

Visitor Profile

Gender

In both the Lake District National Park, and the South Downs, gender of respondents was very close to the national population split of 48% male and 52% female, suggesting the sample is representative by gender. In the New Forest, the sample was skewed more towards women (as it was in 2013), with 63% female and 37% male respondents.

Origin

Across the sample, 21% were local residents, 29% day visitors, 39% visitors staying with the National Park and 12% staying, but outside of the National Park boundaries. However, there was significant variation by area, with both the New Forest and South Downs containing more local residents, and the South Downs with the highest percentage of day visitors.

In the New Forest, the sample was split 33% local residents, 35% day visitors, 19% staying within the New Forest and 13% staying outside.

In the South Downs, the sample was split 41% local residents, 44% day visitors, 6% staying within the National Park and 8% staying outside.

In contrast, the Lake District was dominated by 49% of visitors staying within the National Park, 12% staying outside of the National Park, 24% day visitors and 15% local residents.

Party Size

Across the overall sample, 80% of groups were adult only and 20% included children. Average party size was 2.5 people.

For the Lake District, 82% of groups were adult only and average party size was 2.5 people.

For the New Forest, 74% of groups were adult only and average party size was 2.7 people.

For the South Downs, 81% of groups were adult only and average party size was 2.4 people.

Party Profile

43% of people were visiting with their partner or spouse, and 19% were alone. 26% were with family, and 15% with friends. 3% of the sample were with organised groups. (NB this was a multiple response question and so figures will exceed 100%).

Again, there was variation by area. The Lake District profile was fairly similar, with 47% with their partner or spouse, 19% alone, 26% with family and 12% with friends.

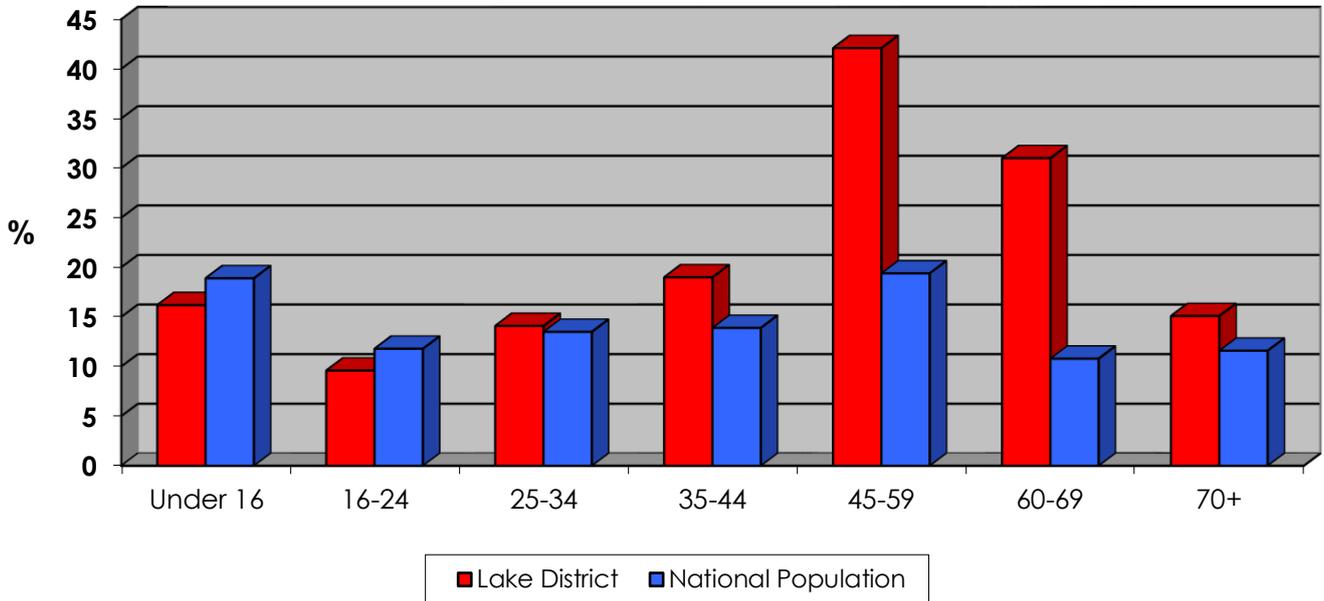
However, in the New Forest there were more family groups (31%). 21% were alone, 39% with partner/spouse and 16% with friends. 5% were with organised groups.

In the South Downs there were more groups of friends at 31%. 21% were alone, 28% with partner/spouse and 18% with family. 5% were with organised groups.

Age Group

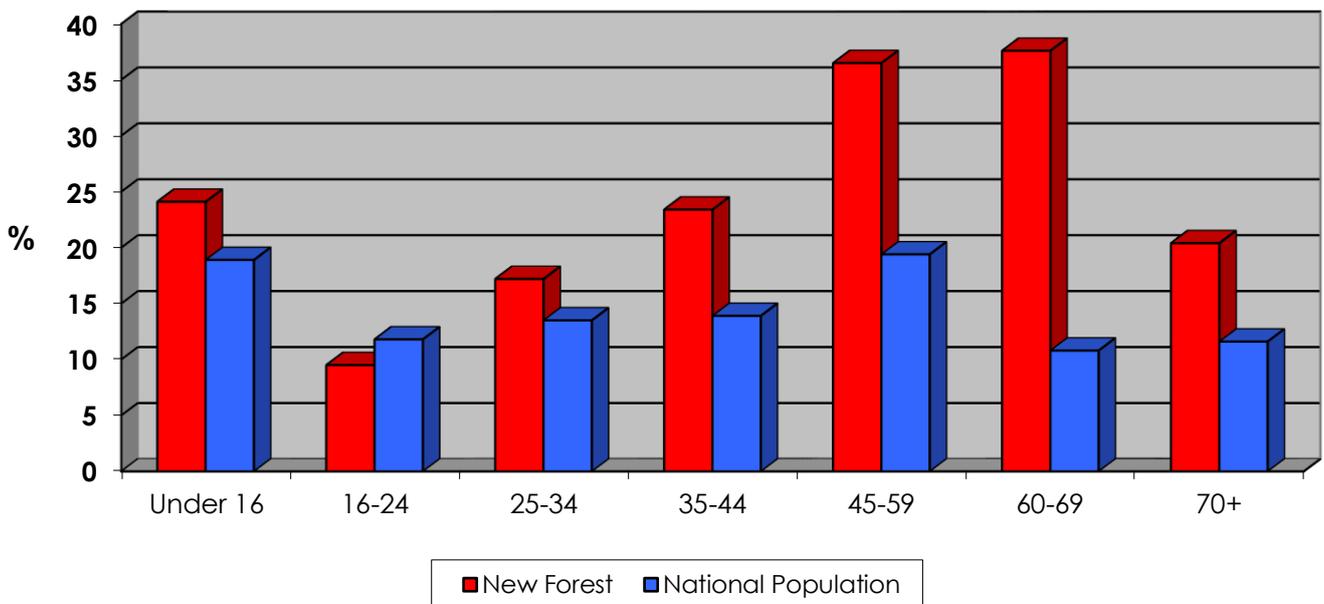
The graph below shows the age profile of visitors (all in party), in comparison to the national population profile.

In the Lake District, the profile was dominated by 45-69 year olds.



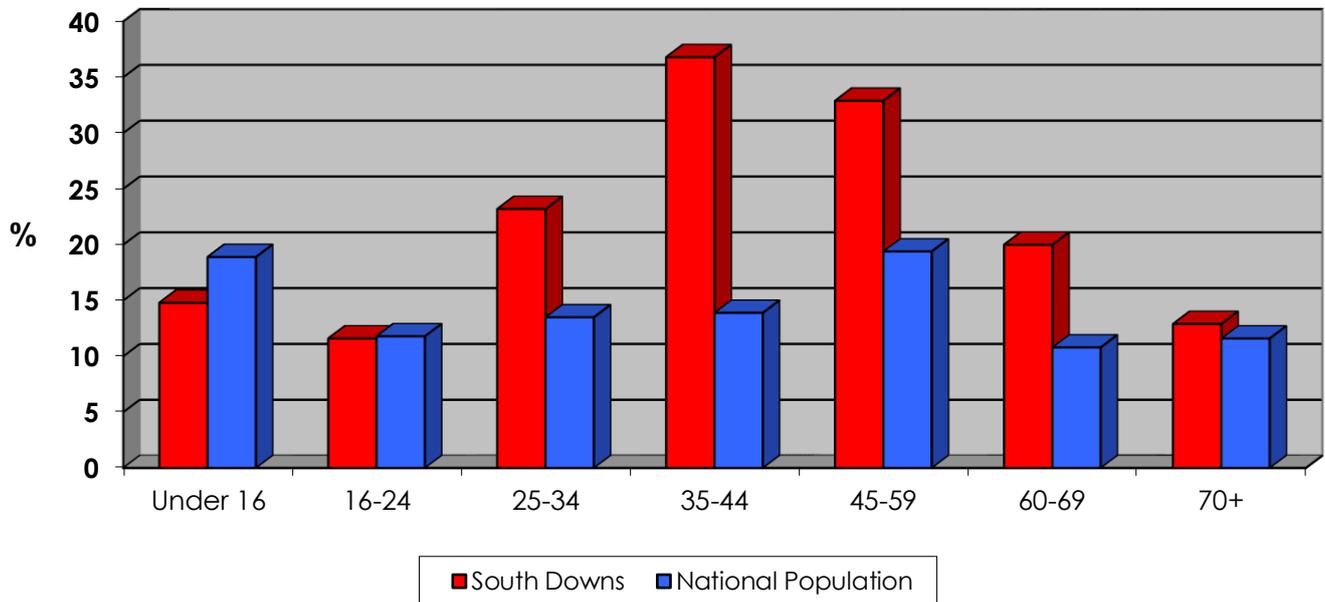
Source: Census mid-2011 Estimates (UK) Office for National Statistics

In the New Forest, the family groups including children boost the under 16 age group, but here too there is a skew towards the older age groups, with significant numbers of people in each age band over the age of 35.



Source: Census mid-2011 Estimates (UK) Office for National Statistics

In the South Downs, the dominant age groups are in the middle - with a high proportion of 25-34, 35-44, and 45-59 year olds.



Source: Census mid-2011 Estimates (UK) Office for National Statistics

Visit History

83% of visitors had made previous visits to the National Parks - as is usually found for these destinations. 17% were first time visitors.

In the Lake District and the New Forest, 84% were repeat visitors, and 16% first time visitors. The South Downs had the most first time visitors at 19%, with 81% repeat visitors.

Travel Choices

Transport Mode

The majority of respondents had travelled on foot (52%), with 42% bus passengers and a quarter using the train⁵⁵. 15% had been on a ferry and 12% on an Open Top bus Tour. 11% had cycled.

NB Some people used more than one sustainable travel choice. Others noted themselves down more than once - for example saying they were a bus passenger, and also ticking the option of Open Top Tour.

There was significant variation by area, to be expected as in each area the LSTF projects and therefore available travel options are quite different.

In the Lake District, the majority of respondents had also travelled on foot (56%), and slightly more (48%) by bus. Travel by train and by ferry was more significant here, used by 30% and 19% of the sample respectively. 10% had cycled, 6% been on an Open Top Tour or water bus, and 3% had hired bikes.

In the New Forest, there were fewer walkers (38%), general bus passengers (32%), or train travellers (12%), but a significant 35% had been on an Open Top Tour. 9% had cycled, and 3% hired bikes.

In the South Downs, the majority of respondents had also walked (52%), but there were fewer bus or train travellers (28% and 19% respectively). Cyclists were more common here, making up 17% of the sample.

Carbon Reduction

People were asked to estimate how many miles they would have travelled by car had they not chosen sustainable transport.

830 people provided estimates, totalling 54,662 car miles saved, and 65.9 miles on average.

In the Lake District, 541 people provided estimates, totalling 45,781 car miles saved, and 84.6 miles on average (up from 80.1 miles in 2013).

In the New Forest, 161 people provided estimates, totalling 6,148 car miles saved, and 38.2 miles on average (up from 35.3 miles in 2013).

In the South Downs, 126 people provided estimates, totalling 2,548 car miles saved, and 20.2 miles on average (down from 37.8 miles in 2013).

⁵⁵ Walking and general cycling were both introduced as new options for the 2014 survey.

Marketing

People were asked how they had heard about their sustainable travel choice. Many people had not needed specific marketing, as they either already knew about it (36%) or had used it before (33%). 21% found out via a website, 19% from a leaflet, and 14% via word of mouth. 4% had seen something in the local press.

In the Lake District, the profile was broadly similar, with 37% already aware, and 35% having used it before. 22% found out via a website, 18% from a leaflet, and 12% via word of mouth. 3% had seen something in the local press.

In the New Forest, people were more likely to have seen a leaflet (29%), but less likely to have used it before (22%). 28% already knew about it, 19% found out via a website, and 14% through word of mouth. Local press was slightly more effective here (8%) as was social media (6%).

In the South Downs, visitors were more likely to have used the transport before (45%), or heard through word of mouth (20%), but less likely to have seen a leaflet (5%), or information on a website (13%). 39% already knew about their transport and 3% had seen local press.

Motivation

People were asked why they decided on their sustainable travel choice. This was a multiple choice question. The most prevalent motivations were to do with experience - 49% for a more enjoyable way to get around and 45% so they were better able to enjoy the views.

38% wanted to leave their car behind, 35% wanted fresh air, and 32% were motivated by environmental benefits. 31% wanted the exercise, and a quarter either didn't have a choice as they had no access to a car, or wanted to save money. 19% were looking for a new experience.

There were differences by area. The Lake District profile was broadly similar. The most prevalent motivations were to do with experience - 48% for a more enjoyable way to get around and 45% so they were better able to enjoy the views. 41% wanted to leave their car behind, 34% were motivated by environmental benefits, and 30% wanted fresh air. 28% wanted the exercise, and a quarter either didn't have a choice as they had no access to a car, or wanted to save money. 15% were looking for a new experience. 19% were doing a linear walk and used sustainable transport to get to the start/back from the end.

In the New Forest, higher proportions were motivated by being able to enjoy the views (56%), for an enjoyable way to get around (57%), for the fresh air (45%) and for a new experience (40%). Fewer (31%) actively wanted to leave their car behind. 28% wanted the exercise, or were motivated by environmental reasons, 22% wanted to save money, and 18% had no access to a car.

In the South Downs, visitors were more likely to choose sustainable travel for the exercise (49%), and the fresh air (46%), and less likely to do so for a more enjoyable way to get around (36%), to be better able to enjoy the views (30%), or to leave their car behind (26%). 30% were motivated by environmental reasons, 22% had no access to a car, and 20% wanted to save money.

Frequency of Use

People were asked how often they used their sustainable travel choice. 8% were doing so for the first time - perhaps being on a leisure trip made them more open to the idea of sustainable travel. Almost half the group use sustainable transport regularly at home, and 18% sometimes at home. 37% use sustainable transport regularly on holiday/trips out, and 21% sometimes.

Visitors in the Lake District followed a similar profile. 7% were using their sustainable travel choice for the first time. 43% use it regularly at home and 20% sometimes at home. 39% use it regularly on holidays/trips out, and 20% sometimes on trips out.

Visitors in the New Forest were more likely to be trying sustainable transport for the first time (17%), and less likely to already use it regularly on holiday/trips out (25%). 43% use it regularly at home and 18% sometimes at home.

Visitors in the South Downs were more regular users of sustainable transport in their daily lives both at home and on holiday - 65% use it regularly at home, and 51% regularly on holidays/trips out. Just 1% were using it for the first time. 8% use it sometimes at home and 12% sometimes on holidays/trips out.

Satisfaction

Visitors were asked how they found their experience of using sustainable transport. Results were extremely positive, with 94% of visitors giving their experience a positive rating. 63% said it was 'very good' and another 31% rated it as 'good'. 5% thought it was just 'ok', and 1% gave a negative response.

Visitors in the Lake District and New Forest were more likely to give a 'very good' rating (64%), and in contrast visitors in the South Downs were less likely to give a 'very good' rating (57%). Overall positive ratings were 96% for the New Forest, 94% for the Lake District, and 92% for the South Downs.

Visitors were asked for feedback. Full responses form appendix four, ordered by area and transport mode.

Change in Frequency of Use

Visitors were then asked if their behaviour would change as a result of their experience - would it make them more likely to travel sustainably?

For 20% there would be no change. However, 61% of all visitors said they would definitely be more likely to choose this travel choice again on holidays, and 36% said they would definitely be more likely to use their travel choice even when back home.

There were some interesting differences by area. Visitors in the South Downs using sustainable transport were more likely to say there would be no change in their future behaviour (44%). They were also less likely to predict a definite change in travel behaviour on future holidays (39%).

Visitors in the Lake District were more likely to change their travel choices in a positive way after having experienced sustainable travel on holiday. Just 17% said there would be no change. A significant 65% said their experience would definitely make them more likely to choose sustainable travel on holidays, and 36% definitely at home.

In the New Forest, 57% said they would definitely be more likely to use sustainable travel on holidays, and 35% at home.

Triggers of Behavioural Change

The most significant triggers of behavioural change lie in more **convenient**, **cheaper**, more **frequent**, and **accessible** sustainable travel choices. In summary:

- 66% agreed strongly that more convenient alternatives would make them consider forms of transport other than the car
- 57% agreed strongly that cheaper alternatives would make them consider forms of transport other than the car
- 56% agreed strongly that increased frequency of alternatives would make them consider forms of transport other than the car
- Over half (54%) agreed strongly that better accessibility to alternatives would make them consider forms of transport other than the car
- Almost half (48-49%) strongly agreed that if the alternatives were better for the environment, or better for their health, they would consider them instead of the car
- 43% agreed strongly that if the alternatives helped them to understand more about what makes the National Park special, they would consider them instead of the car

In the Lake District, results were similar to the overall sample. In summary:

- 66% agreed strongly that more convenient alternatives would make them consider forms of transport other than the car
- 59% agreed strongly that cheaper alternatives would make them consider forms of transport other than the car
- 57% agreed strongly that increased frequency of alternatives would make them consider forms of transport other than the car
- Over half (55%) agreed strongly that better accessibility to alternatives would make them consider forms of transport other than the car
- Almost half strongly agreed that if the alternatives were better for the environment, and better for their health, they would consider them instead of the car
- 42% agreed strongly that if the alternatives helped them to understand more about what makes the National Park special, they would consider them instead of the car
- 39% agreed strongly that if the alternatives were more punctual they would be considered

In the New Forest, results were also similar to the overall sample. Here, slightly more people felt that they would consider travel alternatives if they helped them to understand more about what makes the National Park special. In summary:

- 68% agreed strongly that more convenient alternatives would make them consider forms of transport other than the car
- 57% agreed strongly that increased frequency of alternatives would make them consider forms of transport other than the car
- 54% agreed strongly that cheaper alternatives would make them consider forms of transport other than the car
- 54% agreed strongly that better accessibility to alternatives would make them consider forms of transport other than the car

- 47% agreed strongly that if the alternatives helped them to understand more about what makes the National Park special, they would consider them instead of the car - a similar number felt the same about alternatives that were better for their health
- 44% would be motivated by travel alternatives on environmental grounds

In the South Downs, results were also similar to the overall sample, although less pronounced in most areas. Here, feelings about environmental benefits and health were very slightly more important than frequency. In summary:

- 59% agreed strongly that more convenient alternatives would make them consider forms of transport other than the car
- 51% agreed strongly that better accessibility to alternatives would make them consider forms of transport other than the car
- 50% agreed strongly that cheaper alternatives would make them consider forms of transport other than the car
- 49% also agreed strongly that if the alternatives were better for the environment, or better for their health, they would consider them instead of the car
- 48% agreed strongly that increased frequency of alternatives would make them consider forms of transport other than the car

Spend

Visitor Spend

Visitors were asked how much their party would spend on their trip that day.

In the Lake District, 489 visitors provided information on daily spend, representing 1,261 people. 222 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£11,186	£21.51
Travel/parking costs to destination	£5,089	£4.04
Food and drink	£12,483	£9.90
Travel/parking costs at destination	£1,317	£1.04
Other leisure and recreation	£3,149	£2.50
Admission charges/visitor attractions	£2,046	£1.62
Other shopping	£4,176	£3.31
Shopping for daily needs	£2,525	£2.00
Any other expenses	£1,537	£1.22
TOTAL		£47.14

Average daily spend for people staying overnight within the Lake District National Park was £47.14, 12% higher than for the overall sample, and 16% higher than in this area in the 2013 survey.

Day visitor spend was £26.85, 21% higher than for the overall sample, and 32% higher than in this area in 2013.

In the New Forest, 191 visitors provided information on daily spend, representing 546 people. 32 of these groups were staying overnight in the New Forest National Park itself.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£1,715	£10.99
Travel/parking costs to destination	£1,469	£2.69
Food and drink	£4,143	£7.59
Travel/parking costs at destination	£489	£0.90
Other leisure and recreation	£708	£1.30
Admission charges/visitor attractions	£819	£1.50
Other shopping	£1,683	£3.08
Shopping for daily needs	£758	£1.39
Any other expenses	£1,388	£2.54
TOTAL		£31.98

Average daily spend for people staying overnight within the New Forest National Park was £31.98, -24% lower than for the overall sample, and -10% lower than in this area in the 2013 survey. Accommodation costs are particularly low here, but the sample size for staying visitors is relatively small.

Day visitor spend was £20.99, -5% lower than for the overall sample, but 6% higher than in this area in 2013.

In the South Downs, 135 visitors provided information on daily spend, representing 430 people. 10 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£1,245	£47.88
Travel/parking costs to destination	£818	£1.90
Food and drink	£2,185	£5.08
Travel/parking costs at destination	£96	£0.22
Other leisure and recreation	£122	£0.28
Admission charges/visitor attractions	£374	£0.87
Other shopping	£816	£1.90
Shopping for daily needs	£47	£0.11
Any other expenses	£76	£0.18
TOTAL		£58.42

Average daily spend for people staying overnight within the South Downs National Park was £58.42 - however, the sample size for staying visitors is extremely small so this figure should be treated with caution.

Day visitor spend was £10.54, -52% lower than for the overall sample, and -39% lower than for this area in the 2013 survey.

▶ **Appendix Two: Results by Transport Mode**

Respondents were grouped into five main transport modes - walkers (new in 2014), cyclists (including cycle hire, guided cycle rides, taster sessions and electric bike hire), water bus/ferry, bus passengers (including Open Top Tours and bike buses) and train. This was to ensure sample sizes were robust enough to warrant analysis. People could use more than one mode of transport during their visit, and where they did so they have been placed in each appropriate group.

Sample sizes were split by mode as follows:

Walkers:	735
Cyclists:	180
Boat/ferry:	250
Bus:	736
Train:	359

The samples by mode and area were split as follows:

Walkers:	74% Lake District, 15% New Forest, 11% South Downs
Cyclists:	66% Lake District, 19% New Forest, 14% South Downs
Boat/ferry:	89% Lake District, 11% New Forest, 0% South Downs
Bus passengers:	69% Lake District, 24% New Forest, 6% South Downs
Train travellers:	10% Lake District, 22% New Forest, 68% South Downs

▶

Visitor Profile

Gender

The only group to differ significantly from the national population were the cyclists. The national population split is 48% male and 52% female. However, 59% of cyclists were male, and 41% female (as was the case in the 2013 survey).

Boat/ferry users had the highest female population at 60%. All other transport modes were more or less split like the national population.

Origin

Across the sample, 21% were local residents, 28% day visitors, 39% visitors staying within the National Park and 11% staying, but outside of the National Park boundaries. However, there was significant variation by mode.

Walkers and cyclists followed a similar pattern to the overall sample, although they were less likely to be local residents (13% and 18% respectively).

Boat/ferry users were much less likely to be local residents (4%) and more likely to be staying overnight within the National Parks (57%).

Bus passengers were slightly more likely to be local residents (26%) and slightly less likely to be day visitors (24%), and train travellers were far less likely to be locals (10%).

Party Size

Across the overall sample, 80% of groups were adult only and 20% included children. Average party size was 2.5 people.

For walkers, 80% of groups were adult only and average party size was 2.5 people.

For cyclists, 78% of groups were adult only and average party size was 2.3 people.

For boat/ferry passengers, 77% of groups were adult only, and average party size was 2.7 people.

For bus passengers, 84% of groups were adult only and average party size was 2.7 people.

For rail users, 80% of groups were adult only and average party size was 2.4 people.

Party Profile

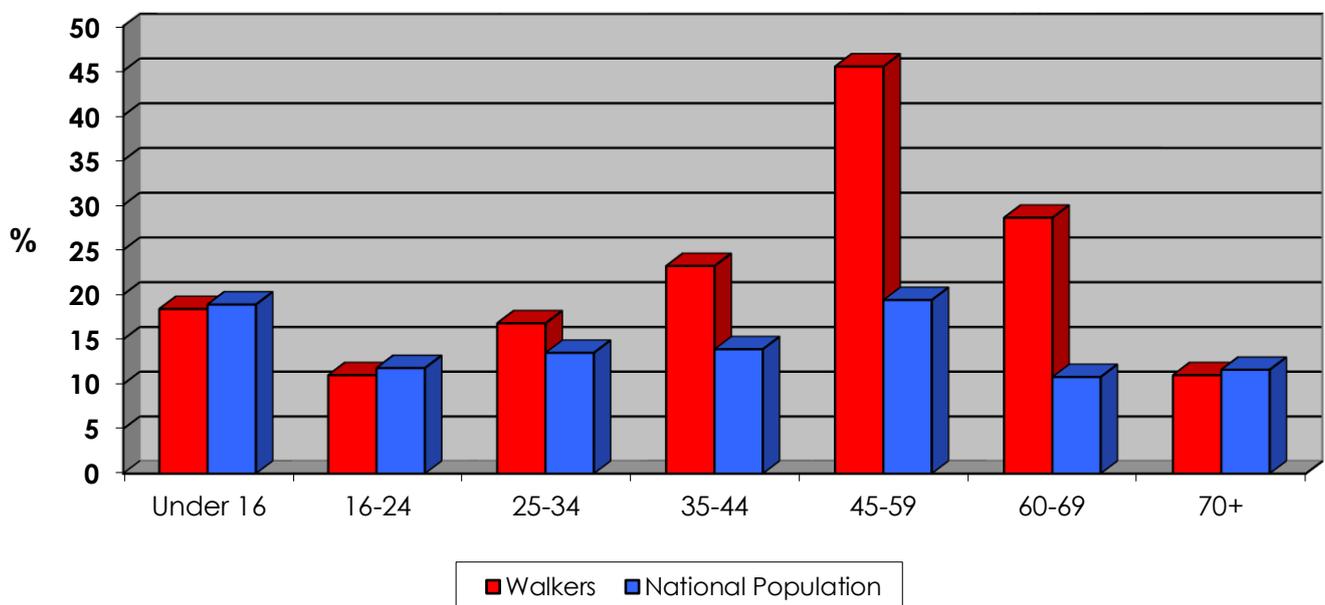
43% of people were visiting with their partner or spouse, and 19% were alone. 26% were with family, and 15% with friends. 3% of the sample were with organised groups. (NB this was a multiple response question and so figures will exceed 100%).

Walkers followed a similar profile, although they were slightly less likely to be alone (15%). Cyclists and train travellers also had the same overall profile, although they were both more likely to include extended family members (33% and 31% respectively). Boat/ferry users were more likely to be with partners and family members (54% and 37% respectively). Bus passengers were slightly more likely to travelling alone (24%).

Age Group

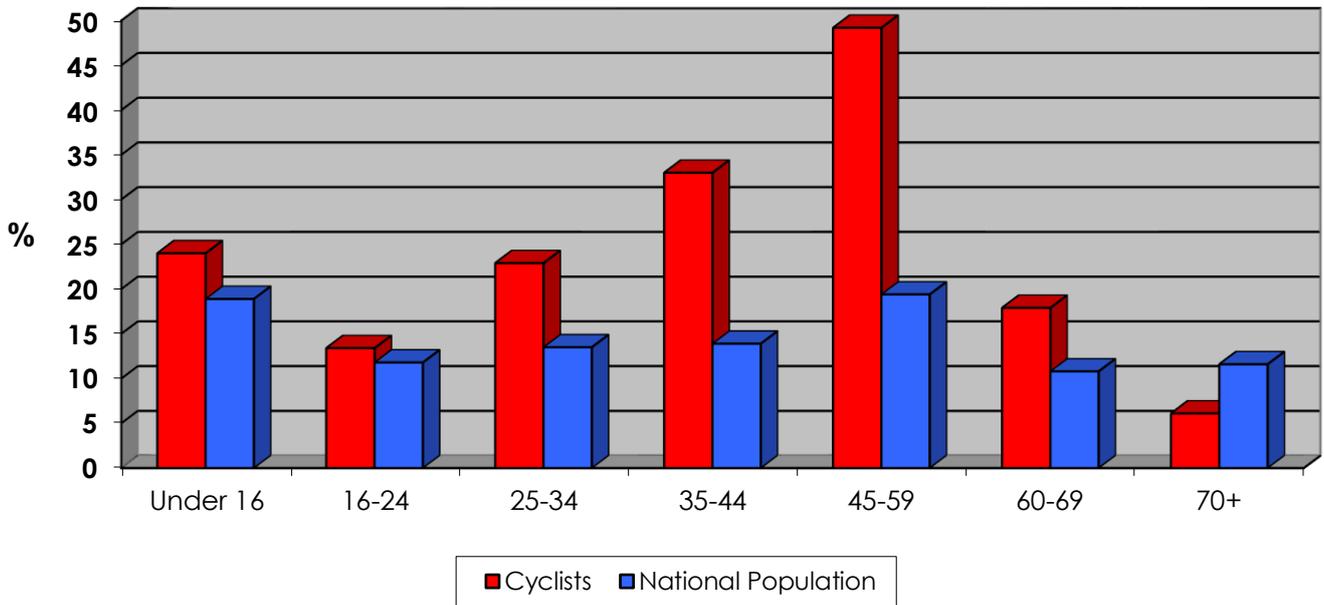
The graph below shows the age profile of visitors by transport mode (all in party), in comparison to the national population profile.

Walkers were far more likely to be in the 45-69 age group - in part a reflection of the age of Lake District visitors, where this mode dominated.



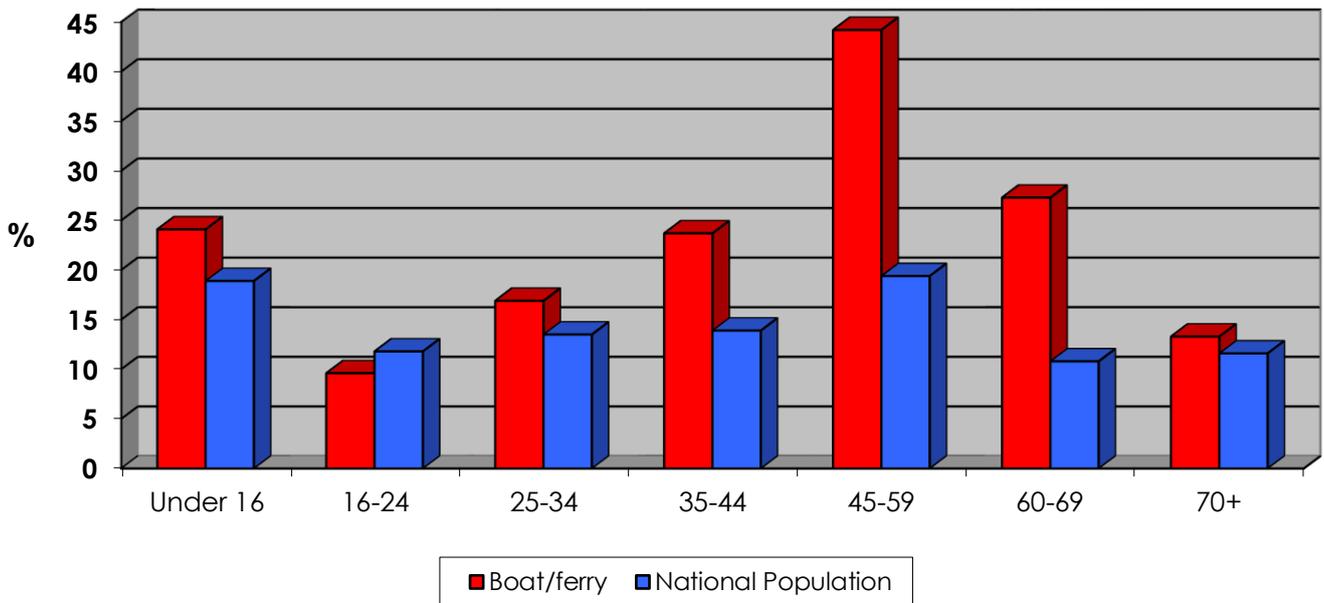
Source: Census mid-2011 Estimates (UK) Office for National Statistics

The cyclists were a relatively young group, with higher proportions of 25-59 year olds than the national population.



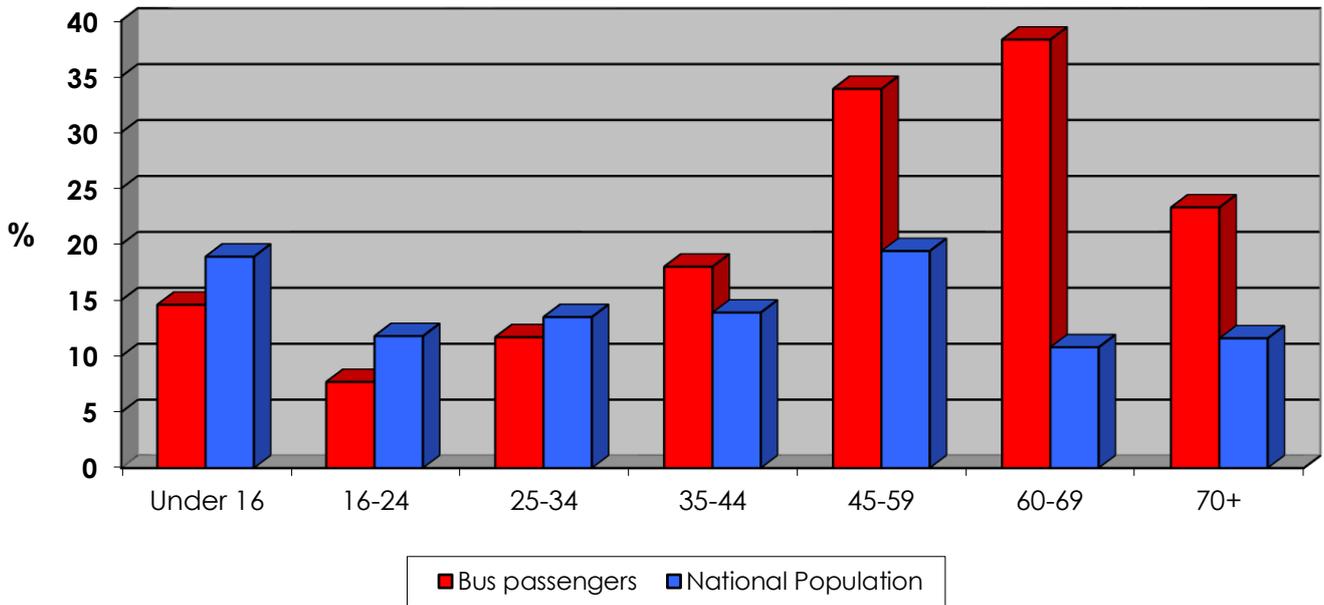
Source: Census mid-2011 Estimates (UK) Office for National Statistics

The family groups in those choosing boats and ferries show in the slightly higher proportions of the under 16s. There are almost twice as many 45-59 year olds using this transport mode than occur in the national population profile.



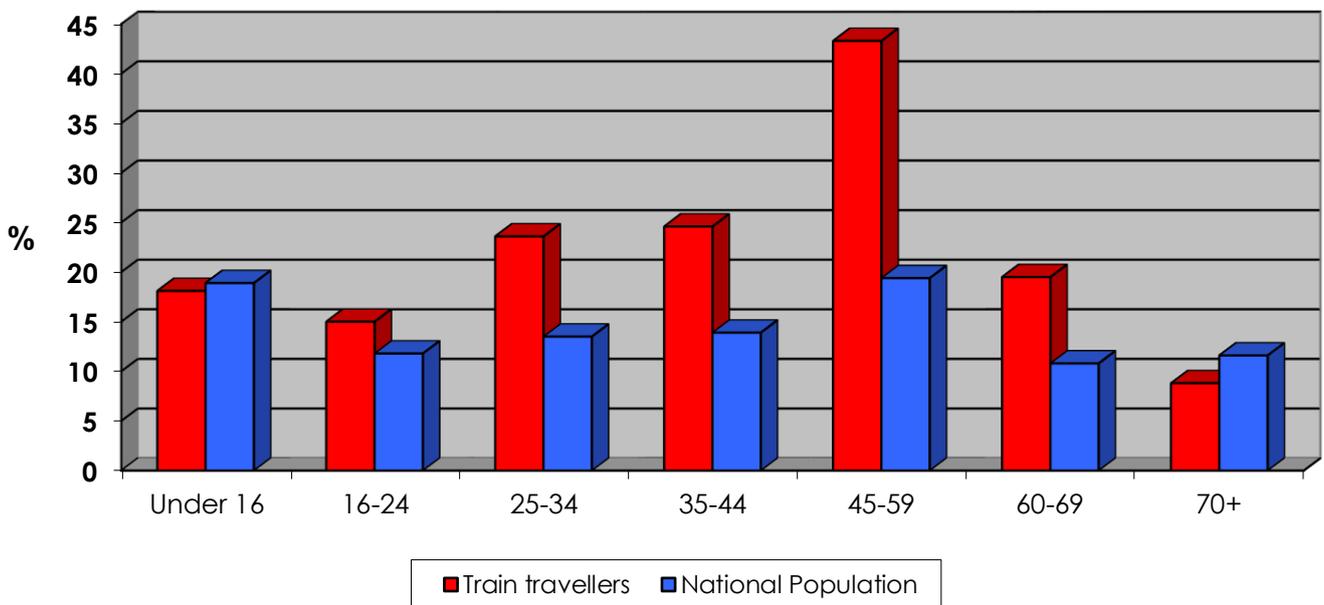
Source: Census mid-2011 Estimates (UK) Office for National Statistics

Bus passengers had a slightly older profile, with high proportions of travellers in the 45+ age groups.



Source: Census mid-2011 Estimates (UK) Office for National Statistics

Train travellers were more likely to be in the 45-59 age range, and slightly less likely to be over 70 years of age.



Source: Census mid-2011 Estimates (UK) Office for National Statistics

Visit History

83% of visitors had made previous visits to the National Parks - as is usually found for these destinations. 17% were first time visitors.

There was little variation by transport mode. Train travellers were more likely to be first time visitors - 23% were new to the destination. Bus passengers were the least likely to be new visitors, with 86% having visited before.

Travel Choices

Carbon Reduction

People were asked to estimate how many miles they would have travelled by car had they not chosen sustainable transport.

Overall, 830 people provided estimates, totalling 54,662 car miles saved, and 65.9 miles on average. By mode:

489 walkers provided estimates, totalling 31,957 car miles saved, and 65.4 miles on average.

121 cyclists provided estimates, totalling 7,935 car miles saved, and 65.6 miles on average.

162 boat/ferry users provided estimates, totalling 12,819 car miles saved, and 79.1 miles on average.

416 bus passengers provided estimates, totalling 26,877 car miles saved, and 64.6 miles on average.

185 train travellers provided estimates, totalling 28,162 car miles saved, and 152.2 miles on average.

Marketing

People were asked how they had heard about their sustainable travel choice. Many people had not needed specific marketing, as they either already knew about it (36%) or had used it before (33%). 21% found out via a website, 19% from a leaflet, and 14% via word of mouth. 4% had seen something in the local press.

There was little variation by transport mode. Cyclists were more likely to have seen something on social media, but at just 6% this is not a widely used tool for information on this subject. They were also slightly more likely to have already known about the option (40%).

Boat/ferry users were more likely to have seen a leaflet (29%) or information on a website (28%), and slightly less likely to have already known about the travel option (30%)

Bus passengers followed the overall profile, but were more likely to have seen a leaflet (25%).

Train travellers were more likely to have seen information on a website (30%).

Motivation

People were asked why they decided on their sustainable travel choice. This was a multiple choice question. The most prevalent motivations were to do with experience - 49% for a more enjoyable way to get around and 45% so they were better able to enjoy the views.

38% wanted to leave their car behind, 35% wanted fresh air, and 32% were motivated by environmental benefits. 31% wanted the exercise, and a quarter either didn't have a choice as they had no access to a car, or wanted to save money. 19% were looking for a new experience.

There were some differences by transport mode. Walkers were more likely to choose walking for the exercise (43%) and for the fresh air (44%).

Cyclists were less likely to actively want to leave the car behind (30%) and more likely to choose cycling for a more enjoyable way to get around (62%), for the exercise (63%) and for the fresh air (56%).

Boat/ferry goers were more likely to take to the water for a new experience (30%), for a more enjoyable way to get around (61%), for the fresh air (49%) and to be better able to enjoy the views (55%).

Bus passengers were more likely actively want to leave the car behind (43%), to choose the bus as a cost effective option/to save money (33%) and to be better able to enjoy the views (53%).

Train travellers were more likely to have no access to a car (36%).

Frequency of Use

People were asked how often they used their sustainable travel choice. 8% were doing so for the first time. Almost half the group use sustainable transport regularly at home, and 18% sometimes at home. 37% use sustainable transport regularly on holiday/trips out, and 21% sometimes.

There was some variation by transport mode. Cyclists were more likely to regularly cycle at home (55%), where the opposite was true for boat/ferry travellers (30%). Bus passengers were more likely to be using the bus for the first time while on their trip in the National Parks. Train travellers were more likely to choose the train while on trips out or holidays (43%).

Satisfaction

Visitors were asked how they found their experience of using sustainable transport. .

Results were extremely positive, with 94% of visitors giving their experience a positive rating. 63% said it was 'very good' and another 31% rated it as 'good'. 5% thought it was just 'ok'.

There was little variation by transport mode, with the exception of boat/ferry travellers who were more likely to give the most positive rating of 'very good' (75%).

Visitors were asked for feedback. Full responses form appendix four, ordered by area and transport mode.

Change in Frequency of Use

Visitors were then asked if their behaviour would change as a result of their experience - would it make them more likely to travel sustainably?

For 20% there would be no change. However, 61% of all visitors said they would definitely be more likely to choose their sustainable travel choice again on holidays, and 36% said they would definitely be more likely to use their travel choice even when back home.

There was little variation by transport mode. Boat/ferry passengers were more likely to travel on the water again while on trips out or holidays (78% definitely). The other significant impact was for cyclists. Having chosen to cycle while on a visit to a National Park, cyclists were more likely to cycle again while on holiday (70% definitely) and also when back at home (48%).

Triggers of Behavioural Change

Visitors were asked to what extent they agreed with a series of statements about alternatives to using a car, to identify which would motivate them to change their travel behaviour.

The question asked: "I would consider forms of travel other than my car if the alternatives....."

The most significant triggers of behavioural change lie in more **convenient**, **cheaper**, more **frequent**, and **accessible** sustainable travel choices. In summary:

- 66% agreed strongly that more convenient alternatives would make them consider forms of transport other than the car
- 57% agreed strongly that cheaper alternatives would make them consider forms of transport other than the car
- 56% agreed strongly that increased frequency of alternatives would make them consider forms of transport other than the car
- Over half (54%) agreed strongly that better accessibility to alternatives would make them consider forms of transport other than the car
- Almost half (48-49%) strongly agreed that if the alternatives were better for the environment, or better for their health, they would consider them instead of the car
- 43% agreed strongly that if the alternatives helped them to understand more about what makes the National Park special, they would consider them instead of the car

For cyclists, **health** was a more significant trigger of behavioural change - 66% agreed strongly that they would consider travel alternatives that were better for their health. This was followed by the 'usual' four choices of convenience, cost, accessibility and frequency. For cyclists, alternatives that are better for the environment are also slightly more important, with 55% agreeing strongly that they would consider travel alternatives that were better for the environment.

For train travellers and bus passengers, alternatives that are better for the environment are also slightly more important than for the sample overall, with 55%/54% respectively agreeing strongly that they would consider travel alternatives that were better for the environment.

48% of cyclists and 49% of bus passengers and boat/ferry users strongly agreed that they would consider forms of travel other than their car if the alternatives helped them to understand more about what makes the National Park special - slightly more important to these groups than to the sample overall.

Spend

Visitor Spend

Visitors were asked how much their party would spend on their trip that day.

(NB this was not asked in the online version due to issues of recall).

66 cyclists provided information on daily spend, representing 179 people. 19 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£1,778	£32.93
Travel/parking costs to destination	£591	£3.30
Food and drink	£1,595	£8.91
Travel/parking costs at destination	£152	£0.85
Other leisure and recreation	£612	£3.42
Admission charges/visitor attractions	£150	£0.84
Other shopping	£185	£1.03
Shopping for daily needs	£202	£1.12
Any other expenses	£150	£0.84
TOTAL		£53.24

Average daily spend for cyclists staying overnight within the National Park boundaries was £53.24 per day, 32% higher than the overall sample at £42.22 per day.

Day visitors who cycled spent on average £20.31, -9% less than the overall sample. Cyclists spent more on accommodation and leisure and recreation but less at visitor attractions, and shopping (other than for daily needs).

274 walkers provided information on daily spend, representing 800 people. 84 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£4,881	£24.78
Travel/parking costs to destination	£3,012	£3.77
Food and drink	£7,087	£8.86
Travel/parking costs at destination	£639	£0.80
Other leisure and recreation	£1,722	£2.15
Admission charges/visitor attractions	£1,378	£1.72
Other shopping	£2,074	£2.59
Shopping for daily needs	£1,274	£1.59
Any other expenses	£1,018	£1.27
TOTAL		£47.53

Average daily spend for walkers staying overnight within the National Park boundaries was £47.53 per day, 13% higher than the overall sample at £42.22 per day.

Day visitors who walked spent on average £22.75, similar to the overall sample. Walkers spent more on accommodation, visitor attractions, and leisure and recreation but slightly less on shopping (other than for daily needs).

71 boat/ferry users provided information on daily spend, representing 224 people. 24 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£1,229	£20.48
Travel/parking costs to destination	£1,128	£5.04
Food and drink	£2,944	£13.14
Travel/parking costs at destination	£468	£2.09
Other leisure and recreation	£1,092	£4.88
Admission charges/visitor attractions	£710	£3.17
Other shopping	£626	£2.79
Shopping for daily needs	£771	£3.44
Any other expenses	£515	£2.29
TOTAL		£57.32

Average daily spend for boat and ferry users who stayed overnight within the National Park boundaries was £57.32 per day, 36% higher than the overall sample at £42.22 per day. This was due to the daily spend rather than accommodation spend - daily spend for visitors who took water buses or ferries was on average £36.84, around two thirds more than the overall sample.

Spend was high across all sectors but particularly high for travel and parking costs at destination (+143%), shopping for daily needs (+122%), admission charges and spend at visitor attractions (+110%) and other leisure and recreation expenditure (+77%).

498 bus passengers provided information on daily spend, representing 1,255 people. 171 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£8,203	£18.31
Travel/parking costs to destination	£3,541	£2.82
Food and drink	£11,179	£8.91
Travel/parking costs at destination	£1,132	£0.90
Other leisure and recreation	£2,215	£1.76
Admission charges/visitor attractions	£2,008	£1.60
Other shopping	£3,964	£3.16
Shopping for daily needs	£1,840	£1.47
Any other expenses	£2,059	£1.64
TOTAL		£40.57

Average daily spend for bus passengers staying overnight within the National Park boundaries was £40.57 per day, just -4% less than the overall sample at £42.22 per day.

Average daily spend for bus passengers was £22.26, similar to the overall sample. Bus passengers spent less on their accommodation, and on travel costs to reach their destination, but slightly more on shopping (other than for daily needs).

212 train travellers provided information on daily spend, representing 526 people. 88 of these groups were staying overnight in the National Park boundaries.

Category of Spend	Total Spend	Spend Per Person
Accommodation (those staying within the National Park)	£3,976	£17.21
Travel/parking costs to destination	£3,881	£7.38
Food and drink	£5,942	£11.30
Travel/parking costs at destination	£619	£1.18
Other leisure and recreation	£1,170	£2.22
Admission charges/visitor attractions	£847	£1.61
Other shopping	£2,125	£4.04
Shopping for daily needs	£1,456	£2.77
Any other expenses	£1,593	£3.03
TOTAL		£50.74

Average daily spend for train travellers staying overnight within the National Park boundaries was £50.74 per day, 20% higher than the overall sample at £42.22 per day.

Average daily spend was £33.53, around 50% more than for the overall sample. Train travellers spent less on their accommodation, but more on most other sectors, and particularly on travel costs to reach their destination (+118%), 'other' expenses (+104%), and shopping for daily needs (+79%).

Appendix Three: Paper Survey

Sustainable Travel Choices User Survey



To help guide future decision making about sustainable transport options in the National Parks, please complete our short questionnaire about your travel choices today.

The information you provide will be completely confidential, but leave us your contact details and we will enter you into a prize draw to win £100.





Please return this survey either to the person who gave it to you, or by sealing and returning it free of charge. Simply moisten the seal on this page and fold the survey so that the postal address is visible.

Prize draw terms and conditions can be found at: www.golakes.co.uk/survey/terms

If you have any questions about this research please contact Helen Tate, Research Manager at Cumbria Tourism on 015398 25001.

ABOUT YOU			
Q1	Gender:	Male <input type="checkbox"/>	Female <input type="checkbox"/>
Q2	Are you a:	Local resident <input type="checkbox"/>	Day visitor <input type="checkbox"/>
Q3	Staying visitor (staying within the National Park) <input type="checkbox"/>	Staying visitor (staying outside the National Park) <input type="checkbox"/>	
Q3	How many are in your party today?	No. adults:	No. children:
Q4	Who are you visiting with today? (tick all)	Alone <input type="checkbox"/>	Partner/spouse <input type="checkbox"/>
		Family <input type="checkbox"/>	Friends <input type="checkbox"/> Organised group <input type="checkbox"/>
Q5	Please identify the age groups of all those in your party	Under 16 <input type="checkbox"/>	16-24 <input type="checkbox"/>
		25-34 <input type="checkbox"/> 35-44 <input type="checkbox"/> 45-59 <input type="checkbox"/> 60-69 <input type="checkbox"/> 70+ <input type="checkbox"/>	
Q6	Have you been to this area before?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
ABOUT YOUR TRAVEL CHOICES			
You have been selected to help with our survey because you are using a sustainable form of transport. Please identify from the list below which of these it is.			
	Walking	<input type="checkbox"/>	
	Cycling	<input type="checkbox"/>	
	Cycle hire	<input type="checkbox"/>	
	Guided cycle ride	<input type="checkbox"/>	
	Taster cycle session	<input type="checkbox"/>	
Q7	Electric bike hire	<input type="checkbox"/>	
	Electric car hire	<input type="checkbox"/>	
	Pay As You Drive car hire	<input type="checkbox"/>	
	Water bus	<input type="checkbox"/>	
	Ferry	<input type="checkbox"/>	
	Bus - Open Top Tour	<input type="checkbox"/>	
	Bus passenger (please identify bus no. or route)	<input type="checkbox"/>	
	Bike bus passenger (please identify bus no. or route)	<input type="checkbox"/>	
	Train (please state destination)	<input type="checkbox"/>	
	None of these	<input type="checkbox"/>	
Q8	If you had used your car instead of the above transport, how many miles would you have travelled?		
	No. of Miles:	N/A <input type="checkbox"/>	
Q9	Please tell us where you were given this survey e.g. Windermere		
	<input style="width: 100%;" type="text"/>		
Q10	How did you hear about your travel choice? (tick all that apply)		Leaflet* <input type="checkbox"/>
	Local press* <input type="checkbox"/>	Poster <input type="checkbox"/>	Radio* <input type="checkbox"/>
	Advert* <input type="checkbox"/>	Word of mouth <input type="checkbox"/>	Social Media* <input type="checkbox"/>
	Website* <input type="checkbox"/>	Used before <input type="checkbox"/>	Already knew about it <input type="checkbox"/>
	* Please give details, (i.e. Facebook, name of newspaper etc)		
	Other (please specify):		
	<input style="width: 100%;" type="text"/>		
Q11	Why did you choose this option today? (tick all that apply)		
	To leave the car behind <input type="checkbox"/>	I don't have access to a car <input type="checkbox"/>	
	Green - better for the environment <input type="checkbox"/>	For a new experience <input type="checkbox"/>	
	For a more enjoyable way to get around <input type="checkbox"/>	Cost effective/save money <input type="checkbox"/>	
	For the exercise <input type="checkbox"/>	For the fresh air <input type="checkbox"/>	
	To do a linear bike ride and travel to the start/back from end <input type="checkbox"/>	To do a linear walk and travel to the start/back from end <input type="checkbox"/>	
	Better able to enjoy the views <input type="checkbox"/>	So that I could enjoy a drink <input type="checkbox"/>	
	Other (please specify):		
	<input style="width: 100%;" type="text"/>		
Q12	How often do you use this particular form of transport?		New - this is my first time <input type="checkbox"/>
	Regularly at home <input type="checkbox"/>	Sometimes at home <input type="checkbox"/>	
	Regularly on holiday/trips out <input type="checkbox"/>	Sometimes on holiday/trips out <input type="checkbox"/>	
Q13	How did you find the experience?		Very good <input type="checkbox"/> Good <input type="checkbox"/>
	OK <input type="checkbox"/>	Poor <input type="checkbox"/>	Very Poor <input type="checkbox"/>
Q14	Have you any feedback you would like to share with us?		
	<input style="width: 100%; height: 50px;" type="text"/>		
Q15	Is this a travel option you would now be more likely to use again?		No change <input type="checkbox"/>
	Yes definitely - on holidays <input type="checkbox"/>	Yes definitely - at home <input type="checkbox"/>	
	Possibly - on holidays <input type="checkbox"/>	Possibly - at home <input type="checkbox"/>	

Continued overleaf...



Q16 To what extent could you agree with these statements. "I would consider forms of travel other than my car if the alternatives..."

	Agree strongly	Agree slightly	Disagree slightly	Disagree strongly	Don't know
...were cheaper	<input type="checkbox"/>				
...were more convenient	<input type="checkbox"/>				
...were more accessible	<input type="checkbox"/>				
...were more frequent	<input type="checkbox"/>				
...were more punctual	<input type="checkbox"/>				
...were more widely advertised	<input type="checkbox"/>				
If I knew more about the alternatives	<input type="checkbox"/>				
...were more fun	<input type="checkbox"/>				
...were better for the environment	<input type="checkbox"/>				
...were better for my health	<input type="checkbox"/>				
...helped me to understand more about what makes the National Park special	<input type="checkbox"/>				

Q17 How much do you AND YOUR PARTY expect to spend TODAY on the following (don't leave blanks - put '0' for no spend amount)

Accommodation (if within National Park)	£	Travel/parking TO here.	£
Food & drink.	£	Travel/parking WHILE here.	£
Other leisure & recreation.	£	Admission charges/ Visitor attractions.	£
Other shopping.	£	Shopping for daily needs.	£
Any other expenses.	£		

CONTACT DETAILS

Q18 Name: _____

Q18 Email: _____

Tel. No. _____ Postcode: _____

Q19 May we use your details for future research purposes? Yes No

Q20 May we use your details for future marketing and promotional purposes? Yes No

Freeport RRG-BBST-KJRS
Cumbria Tourism
Windermere Road
Staveley
KENDAL
LA8 9PL



Sustainable Travel Choices User Survey

Win £100

Tell us about your day and you could win £100!

South Downs National Park Authority

Lake District National Park

NEW FOREST NATIONAL PARK

ANNEX D

Mosaic Segmentation Analysis

LSTF Visitor Travel Case Study - Mosaic Segmentation Analysis 2014

1. Introduction

This analysis is based on four Mosaic profiles, as well as on analysis carried out in 2013:

1. Cumbria Visitors from the countywide visitor survey carried out in 2012 (891 records)
2. New Forest Visitors from the 2014 survey carried out as part of the Visitor Travel Case Study project (383 records)
3. South Downs Visitors from the 2014 survey carried out as part of the Visitor Travel Case Study project (868 records)
4. Sustainable Travellers generated from responses to the Sustainable Travel Choices User Survey in 2014 (1,103 records)

2. Cumbria Visitors

The top three segments for visitors to Cumbria and the Lake District are F25 Production Managers, D18 Hardworking Families, and D19 Innate Conservatives. Segments have been fairly consistent over the last few years. There have been some changes in the visitor profile since 2009 - but not to a great degree. Out of the top ten segments, eight are the same in both profiles, with some shifts in significance.

F25 Production Managers

Production Managers are people approaching retirement, who have lived in quiet streets of semi-detached, often inter war housing, typically in the established but more pleasant suburbs of large industrial cities for many years. There are also some married couples with children of school years. These are very often the homes of white-collar and technical workers, who are close to having given a lifetime of service in specialist departments of large national or international manufacturing companies.

Key Facts

White collar workers
Comfortable and unambitious
Paid off mortgages
Comfortable with technology
Very cautious borrowers
Loyal to large brands
Not ostentatious
Mix of ages

D18 Hardworking Families

Hardworking Families are mostly industrious empty nesters living in unpretentious but agreeable, low density, owner occupied estates, typically built during the 1970s and 1980s on the outskirts of medium sized towns.

Key Facts

Industrious empty nesters
Mix of occupations
Commercial and industrial
Few qualifications
Reasonable incomes
Hard working
Grandchildren
Mainstream tastes

D19 Innate Conservatives

Innate Conservatives live in a mix of housing styles which often includes detached two storey houses and modern style bungalows, set in reasonable plots where retired people enjoy a comfortable lifestyle on the outskirts of market towns and medium size commercial centres.

Key Facts

Spacious bungalows
Retired married couples
Self employed
Good social networks
Pride in home and gardens
Responsible
Hardworking
Savings and investments

3. New Forest Visitors

The top three segments for visitors to the New Forest in 2014 are D19 Innate Conservatives, B05 Mid-Career Climbers, and B06 Yesterday's Captains. Despite being relatively small samples for both the 2013 and 2014 segmentation of New Forest visitors, 7 of the top 10 segments are the same in both years of analysis, suggesting consistency, and an accurate representation of significant customer types.

D19 Innate Conservatives

Innate Conservatives live in a mix of housing styles which often includes detached two storey houses and modern style bungalows, set in reasonable plots where retired people enjoy a comfortable lifestyle on the outskirts of market towns and medium size commercial centres.

Key Facts

- Spacious bungalows
- Retired married couples
- Self employed
- Good social networks
- Pride in home and gardens
- Responsible
- Hardworking
- Savings and investments

B05 Mid-Career Climbers

Mid-Career Climbers are families with children of secondary school age and older, who live in pleasant modern style houses on the outskirts of provincial cities. Many of the parents are in their forties and fifties and have achieved considerable career success in senior technical and middle management positions, often within large national corporations.

Key Facts

- 40s and 50s
- Families
- Secondary school children
- Pleasant modern houses
- Technical skills
- Early adopters of new tech
- Children's education
- Competitive

B06 Yesterday's Captains

Yesterday's Captains are mostly older professionals and managers who live in attractive and spacious houses in well established suburbs of large provincial cities. Here we find people still with active minds and interests who are either approaching or have recently reached retirement, whose children may have left home recently and who, though comfortably off, nevertheless have to be wise in how they spend their declining incomes.

Key Facts

- Attractive spacious houses
- Owner occupied
- Suburbs
- Active minds
- Recently retired professionals
- Empty nesters
- Traditional
- Quality and service

4. South Downs Visitors

The top three segments for visitors to the South Downs in 2014 are F24 Garden Suburbia, D19 Innate Conservatives, and O61 Convivial Homeowners.

F24 Garden Suburbia

Garden Suburbia is particularly common in outer London suburbs, and is characterised by quiet residential streets. These areas were built during the 1930s and 1950s and are convenient for people to commute by train to white-collar jobs in city centres. Most of the houses are semi-detached, often half timbered in a neo-Elizabethan style, with garages and reasonably spacious gardens.

Key Facts

Middle aged families
Well established in community
Buy on the basis of quality
Dependent on cars
Comfortable internet users
Moderate views
Semi detached suburbia
Adult children still at home

D19 Innate Conservatives

Innate Conservatives live in a mix of housing styles which often includes detached two storey houses and modern style bungalows, set in reasonable plots where retired people enjoy a comfortable lifestyle on the outskirts of market towns and medium size commercial centres.

Key Facts

Spacious bungalows
Retired married couples
Self employed
Good social networks
Pride in home and gardens
Responsible
Hardworking
Savings and investments

O61 Convivial Homeowners

Convivial Homeowners are well educated people, many in their late thirties and forties, who are bringing up a young family in an area of pleasant, older style housing in a middle ring suburb of a large city.

Key Facts

Well educated
Professionals
Creative jobs
Comfortable incomes
Late 30s / early 40s
Young families
Period features
Close to cities

Three segments (from a pool of 67 possibilities) are shared between each of the National Parks, featuring in the top ten customer types for the Lake District, the New Forest and the South Downs:

They are:

- B06 Yesterday's Captains
- D19 Innate Conservatives
- F24 Garden Suburbia

Sustainable Travellers

The top three segments for visitors who chose to travel sustainably on their visit to the National Parks in 2014 were B06 Yesterday's Captains, F24 Garden Suburbia, and F25 Production Managers. 6 of the top 10 segments are the same in both years of analysis, suggesting consistency, and an accurate representation of significant customer types likely to choose sustainable transport options during a visit to a National Park.

B06 Yesterday's Captains

Yesterday's Captains are mostly older professionals and managers who live in attractive and spacious houses in well established suburbs of large provincial cities. Here we find people still with active minds and interests who are either approaching or have recently reached retirement, whose children may have left home recently and who, though comfortably off, nevertheless have to be wise in how they spend their declining incomes.

Key Facts

- Attractive spacious houses
- Owner occupied
- Suburbs
- Active minds
- Recently retired professionals
- Empty nesters
- Traditional
- Quality and service

F24 Garden Suburbia

Garden Suburbia is particularly common in outer London suburbs, and is characterised by quiet residential streets. These areas were built during the 1930s and 1950s and are convenient for people to commute by train to white-collar jobs in city centres. Most of the houses are semi-detached, often half timbered in a neo-Elizabethan style, with garages and reasonably spacious gardens.

Key Facts

- Middle aged families
- Well established in community
- Buy on the basis of quality
- Dependent on cars
- Comfortable internet users
- Moderate views
- Semi detached suburbia
- Adult children still at home

F25 Production Managers

Production Managers are people approaching retirement, who have lived in quiet streets of semi-detached, often inter war housing, typically in the established but more pleasant suburbs of large industrial cities for many years. There are also some married couples with children of school years. These are very often the homes of white-collar and technical workers, who are close to having given a lifetime of service in specialist departments of large national or international manufacturing companies.

Key Facts

- White collar workers
- Comfortable and unambitious
- Paid off mortgages
- Comfortable with technology
- Very cautious borrowers
- Loyal to large brands
- Not ostentatious
- Mix of ages

The three segments that feature in the top ten customer types for the three National Parks are also significant here. B06 Yesterday's Captains, D19 Innate Conservatives, and F24 Garden Suburbia are segments that should be considered as significant potential markets for sustainable travel choices across the National Parks.

5. High Index Scores

As well as analysis by volume, it is also possible to see which groups are more likely than average to appear in these databases. This is done using an index score - an index of 100 is average, and anything above this means that there is a higher percentage of this group than you would expect to find, based on what exists in the national population. So for example, an index of 200 indicates a particular segment is twice as likely to appear in your profile than average.

Using this assessment, the Mosaic segments which have the highest propensity to visit the New Forest National Park are:

- E20 Golden Retirement (index score 363)
- B08 Dormitory Villagers (index score 304) - also consistent with 2013 results

The Mosaic segments with the highest propensity to visit the Lake District are:

- C12 Country Loving Elders (index score 241)
- B10 Parish Guardians (index score 224)

The Mosaic segments with the highest propensity to visit the South Downs are:

- B07 Distinctive Success (index score 509)
- E20 Golden Retirement (index score 392)
- B10 Parish Guardians (index score 354)

The Mosaic segments which are most likely to be travelling sustainably in the National Parks are:

- E22 Beachcombers (index 290) - also consistent with 2013 results
- E20 Golden Retirement (index 280) - also consistent with 2013 results

The E20 Golden Retirement segment features as very high propensity to visit the New Forest National Park, the South Downs National Park, and also to choose sustainable transport - another significant segment for targeting. B10 Parish Guardians also appear as having a high propensity to visit the South Downs and Lake District National Parks - another important visitor type.

6. Significant Segments

Looking at the visitor profiles, and the profile of sustainable travellers, both in volume and index scores, across both 2013 and 2014 results, we have identified some significant segments. They are:

- **B06 Yesterday's Captains**
- **D19 Innate Conservatives**
- **F24 Garden Suburbia**
- **B10 Parish Guardians**
- **E20 Golden Retirement**

When considering sustainable transport provision, information and marketing plans for visitors within the National Parks, these key segments, their requirements and what appeals to them should be used to refine and develop the offer. Full portraits of individual segments are available. These include a general overview, information on demographics and behaviour, online behaviour, and detailed data covering 'who we are, where we live, how green we are, how we live our lives, how we communicate, how we view the world, how we get by, and our financial circumstances'.

7. Segments in Detail

B06 Yesterday's Captains are retired couples, enjoying pensions gained from successful careers, still living in the houses where they raised their families. Key features are:

- attractive spacious houses, in suburbs
- recently retired professionals
- active minds
- empty nesters
- comfortable but budget carefully
- seek quality and service (especially personal service)
- traditional tastes
- share a feeling of responsibility for their local community
- late adopters of new things, prefer secure, reliable brands, not influenced by lifestyle imagery
- knowledgeable gardeners and nature enthusiasts
- enjoy short breaks out of season to mid-range hotels in the country and by the sea from which they are particularly likely to take excursions to visit National Trust properties
- advertising copy most likely to influence this group stress conservative values such as value for money and reliability
- all of their leisure activities are undertaken by car
- television and newspapers a good way to reach this group, especially the Telegraph or the Times, the Mail or the Express
- internet use is very basic - used to plan and book holidays but little else, mobile phones are basic
- green classification most likely to be 03 'green but doubtful' - good potential for change

D19 Innate Conservatives are pillars of local society who are chiefly recent retirees in low density estates on town fringes. Key features are:

- spacious bungalows
- retired married couples
- previously self employed, accountants, teachers
- good social networks
- pride in home and gardens
- responsible and hardworking
- have savings and investments
- to the marketer the most effective method of appealing to this type is the argument that these people owe it to themselves to award themselves a special treat, particularly one which celebrates their long-standing relationship with their partner and recognises the sacrifices they have made in their careers and for their children
- the type of copy known to work successfully for these people includes testimonials from similar looking people, and extensive text with copious factual details which, among other things, focus on quality of service and reliability of performance
- media which are particularly effective at reaching this type are the Daily Telegraph and the Daily Express
- they enjoy leisure activities where they can meet other similar couples, they rely on people with expert knowledge, and prefer well organised, pre-planned experiences
- infrequent internet users
- their preference is for more established brands with a strong offline presence, or those that offer the best value for money.
- green classification most likely to be 03 'green but doubtful' - good potential for change

F24 Garden Suburbia are mid-life families with above average incomes living in suburbs of larger cities. Key features are:

- buy on the basis of quality
- dependent on cars (may enjoy a change from this while on holiday)
- comfortable internet users
- adult children still at home
- like convenience
- enjoy spending time with their family
- they have both the time and the money to make well informed decisions, they buy on the basis of quality of service and reliability, and are prepared to pay a premium for convenience
- they go on regular holidays, and many may have a timeshare property somewhere, or a holiday home in Spain or Portugal.
- regular readers of the Mail and the Express, and some may read the Telegraph
- they are online quite frequently, and regularly check their emails, and look for information online.

- green classification most likely to be 05 'doing their best' or even 06 'sceptical libertarians' so need a nudge to change

B10 Parish Guardians are couples approaching retirement age with ample income living in very pleasant rural locations. Key features include:

- well-off retirees
- active, independent and traditional
- enjoy arts/antiques, nature, gardens, cooking, organic produce
- if the planners receive applications which threaten the local environment there will be no shortage of people willing to register their opposition or to mount a campaign via the local newspaper or their MP
- they prize their individuality and distance themselves from products which are advertised on a mass market
- face-to-face contact is preferred to the internet or mail order as a channel of communication
- the provenance of what they buy may be more important than price (so messages about the National Parks may appeal to this group)
- leisure time is likely to focus on heritage and environment concerns, country pursuits, travel and a strong interest in the performing arts
- media consumption is largely restricted to the wholly trusted Telegraph, although internet usage is competent (typical 'silver surfers')
- holidays are very important, with a minimum of two a year, usually more
- green classification most likely to be 06 'sceptical libertarians' or at best type 05 'doing their best', or definitely need some persuasion to change behaviour

E20 Golden Retirement are people in their 60s and 70s with considerable assets behind them, living in their ideal houses for retirement. Key features are:

- wealthy older people
- distinctive, large properties in attractive retirement areas
- active, with busy social lives
- good taste, and enjoy high quality
- prefer face to face contact
- generally these people do not need to trouble themselves with the internet and would normally prefer to book a foreign trip through a specialist travel agent than via Ryanair's website
- spend substantially on holidays, foreign travel, hotels and restaurants
- tend to make few demands on local public services, preferring to drive their own cars than to use the free bus passes to which they are entitled
- enjoy going for walks in the countryside near their homes
- strict in their choice of newspapers - nothing but the Mail, Express, Telegraph and occasionally the Times crosses their doorstep; not particularly active online
- very traditional views in many respects, and can be seen as upholding the values of an England that many people associate with the 1950s
- green classification most likely to be type 03 'green but doubtful' so potentially easy to recruit