South Downs National Park
Visitor Market Proposition
Final Report

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Executive Summary

Introduction

The South Downs National Park Authority (SDNPA) commissioned TEAM Tourism Consulting to undertake a customer segmentation analysis. The aim of this project was to identify best prospect customer groups to underpin and influence future marketing propositions, and guide future tourism development.

The current situation

The South Downs National Park (SDNP) was estimated to have attracted 18.8m visits in 2016. These visits accounted for £342m of direct expenditure and 20.1m visitor days. Tourism spend supported approximately 4,900 full time job equivalents (FTEs)[1].

Secondary and primary research highlighted:

- **Awareness of SDNP -** Awareness and levels of visiting the South Downs National Park (SDNP) are higher in the South East than other areas of the UK.
- **Strengths of SDNP**. The SDNP has many strengths which visitors value**. Scenery,** the **picturesque** environment, and the gentle countryside are core strengths of the destination. The **peace and quiet** that SDNP affords to visitors, and an opportunity to relax - often the antithesis of their normal lives – are also important.
- **Walking** is an activity related driver. A final core strength for many visitors (but not all) is the **ease of getting to** the SDNP. For people in a certain catchment area, the SDNP is their closest area of major countryside.
- **Competitive Positioning**. SDNP scored strongly as a destination for: walking breaks, relaxing breaks, and adventure sports breaks. **Relaxing** breaks and **walking** breaks have the largest potential for the SDNP. The **New Forest** and the **Cotswolds** are competitors for the South Downs for these break types.

SDNP’s Visitor Segments

A two-stage approach to segmenting the market for the SDNP has been adopted.

- Stage one identified nine **primary** segments based on two dimensions ; a) visitor origin and b) major visitor activities. These represent the totality of the SDNP’s markets, defined from the research data sets.
- Stage two focuses on more specific **target** segments, that TEAM tourism have identified as having the best potential to deliver economic growth for the destination.

Findings from the nine **primary** SDNP market segments (stage one) highlight:

[1] STEAM Multi Area Analysis – All UK National Parks - Global Tourism Solutions 2017

- Local segments (from the Hampshire, Sussex, and Surrey area) account for over half of the estimated value of leisure visits to SDNP (and nearly three quarters of leisure visits).
- Regional and the 'rest of UK' markets are a similar size (about a fifth each) to each other.
- 'Active' segments (walkers, cyclists and other outdoor activities) account for half of overall leisure visitor value to SDNP. Less active segments (i.e. sightseers and potterers) account for about the same value.

Target segments
Primary segments have been rated against three criteria 1) appeal to SDNP, 2) attractiveness of SDNP to the segment and 3) acquisition potential.

The **Regional Actives** segment emerges as the highest scoring segment across these three criteria. This segment is motivated by outdoor activities (walking, cycling, niche sports). It is primarily from the London, Kent and Berkshire. Team Tourism recommends that this should be the principle strategic target audience for the SDNP. The segment is further divided into five sub-segments.

The **Overseas** markets are relatively low scoring segments. However given the current work on the Discover England project to generate international visitor interest and create travel trade distribution channels, there is potential for **tactical** work to capitalise on the Discover England work.

Team Tourism recommendations for **key** target segments can be summarised as follows:

Strategic – long terms priority	Regional Actives	Active Adults
		Active Families
		Hikers
		Keen cyclists
		Niche sport actives
Tactical – DEF driven opportunity	German Active Explorers	

Team Tourism's recommended Market Propositions

1) Among the five sub-groups of the Regional Actives segment, the primary focus should be on the **Active Adults.** This is the largest sub-group, and potentially the highest spending per trip. The target audience profile consists of couples; mainly 50+, ABC1s with a reasonable disposal income. This segment is looking for relaxation, and peace and quiet in a countryside environment. Central to that relaxation is the concept of 'Easy Active Plus'. A key element of the trip will be an outdoor activity. However, the experience is likely to be more than this with an emphasis on the wider destination offer. Especially true for staying visitors.

The SDNP also offers a strongly competitive product for this group.

The market proposition for the Regional Actives (Active Adults) can be summarised in the following diagram:

2) **German Active Explorers** will be booking through the travel trade – either organised tours or Fully Independent Travellers (FIT).

The audience will be couples (travelling without children) – typically 45-60. They will be ABC1s. They will be healthy and active, enjoy walking and hiking, and spending time outdoors but will also be interested in seeing the sights and experiencing local culture. They will typically be first time visitors to the South Downs but will have visited the UK before.

This segment will be looking for gentle adventure and walking, iconic sites and views and possibly parks and gardens. Food will be part of the experience but not a driver. This is not necessarily a London Plus market and it could be seeking a South West Plus concept with South Downs as the trip start/end point.

The market proposition for the German Active Explorers can be summarised in the following diagram:

Team Tourism's recommendations for implementation and activity

The Regional Actives (Active Adults) represents the best prospect market for the SDNP to develop economic benefits. To develop both the Regional Actives and the German Active Explorer segments will require long term activity and a significant amount of partnership and network building. Developing these markets should be regarded as at least a five year plus programme (and more likely 10-15 years) of focused activity, which is adequately resourced.

Implementation should include several activities. These include:

- Undertaking further market research;
- Developing a network (or networks) of South Downs tourism businesses;
- Developing a destination website;
- Working with third party websites / guidebooks;
- Developing a proactive PR programme;
- Undertaking tactical marketing activity e.g. social media, advertising;
- Working in partnership with relevant DMOs;
- Developing the overseas travel trade distribution chain.

1 Introduction

1.1 Study Background

In August 2017, the South Downs National Park Authority (SDNPA) commissioned TEAM Tourism Consulting to undertake a detailed customer segmentation analysis.

The aim of this project was to identify best prospect customer groups to underpin and influence future marketing propositions and tourism development strategies. The aim of this research is to support the economic development of the South Downs National Park and its environs.

There were four specific objectives. These were to identify:

1. **Current visitor segments** - the characteristics, behaviour and activities undertaken of current markets and potential markets.
2. **Target segment definition -** identifying the best-prospect visitor segment profiles for the National Park, particularly high-spending segments (both domestic and international) with the greatest potential propensity to visit the SDNP.
3. **The 'competitive set'** - the core strengths and current marketing propositions and activity of potential competitor destinations.
4. **Recommended Marketing propositions** that can be used to target best prospect segments based on the unique selling points of the South Downs.

The completed research will inform and support the SDNPA and partners in developing future marketing and promotional work, strategy and policy, product development and income generation.

1.2 Methodology

The findings within this study were based on the following:

- **Existing SDNP Research** – The SDNP has undertaken several pieces of primary research. These include three visitor surveys (undertaken in 2012, 2014, and 2015). The data from these surveys was amalgamated into one large dataset to provide a detailed picture of visitor characteristics and behaviour. The SDNPA have also undertaken research into non-visitors[2] which provided data on awareness of, and reasons for not visiting, the SDNP.

- **Primary Research** – an online survey was commissioned as part of this study. The sample was 1150 people that had taken UK day trips or short breaks in the last five years. It was drawn from people resident in the South Downs' core catchment area in and around South West London. The survey focused on holiday taking and destination preferences, potential competitors to the South Downs, trips details (for visitors) and reasons for not visiting. Full details on the methodology and findings of this survey are available in **appendix 2.**

[2] Awareness of the SDNP – undertaken by YouGov in 2016

- **Competitor Analysis**. Analysis was undertaken on four competitor / comparator destinations - the New Forest, the Cotswolds, the Chilterns and the National Forest **(appendix 3).**

The study also involved **desk research** on relevant data – e.g. the behaviour of overseas markets and their interest in visiting beyond London.

1.3 Destination overview

The SDNP covers 628 square miles and stretches 87 miles from Winchester in the west to Eastbourne in the east through the counties of Hampshire, West Sussex and East Sussex.

Chart 1: The South Downs National Park

Tourism to the South Downs National Park was estimated[3] to be worth £342m in 2016. SDNP attracted 18.8m visits in 2016 – these accounted for 20.1m visitor days. Tourism spend supported approximately 4,900 full time job equivalents (FTEs).

Key attractions for the SDNP are:

- The South Downs Way National Trail. Open to walkers, cyclists and horse-riders it spans the entire length of the park, and is the only National Trail to lie wholly within a national park.
- Iconic viewpoints and scenery - The Seven Sisters cliffs from Seaford Head, Beachy Head and lighthouse, Devils Dyke, Chanctonbury Ring and Cissbury Ring, Goodwood racecourse, The Meon Valley and the Hampshire Hangers.
- Stately homes and National Trust properties including Stansted Park, Parham, Petworth, Uppark and Hinton Ampner.

[3] STEAM Multi Area Analysis – All UK National Parks - Global Tourism Solutions 2017

- Goodwood Estate – the house, racecourse, motor-racing track and associated events.
- Cowdrey Park, Arundel Castle, Weald and Downland Living Museum, and Queen Elizabeth Country Park.
- Jane Austin's Chawton and the Bloomsbury group influence at Charleston and Rodmell.
- Characteristic market towns and villages such as Lewes, Petersfield, Midhurst, Selbourne, Alfriston and Charlton.

In terms of the **accommodation** sector in the SDNP, research highlights[4]:

- Strong weekend and peak summer midweek demand, with frequent shortages of all types of accommodation at these times;
- A notable demand for quality accommodation;
- Prospects for growth in demand for all types of visitor accommodation with gaps around Petersfield and the South Downs Way;
- A largely leisure driven and seasonal market for visitor accommodation in the National Park, suggesting a need for incremental supply growth to avoid overly diluting winter trade.

Table 1summarises accommodation supply:

Table 1: South Down National Park Visitor Accommodation Supply November 2014

Type of Accommodation	Total establishments	%	Total bedspaces	%
Hotels	24	5.3	2115	22.2
Inns	50	11.1	607	6.4
Guest Houses / B&Bs	153	34.1	829	8.7
Self-catering	161	35.9	937	9.9
Caravan and Camping Site	39	8.7	4148	43.6
Camping sites	9	2.0	220	2.3
Group & Youth Accommodation	13	2.9	654	6.9
TOTAL	**449**	**100**	**9510**	**100**

Source: South Downs Visitor Accommodation Review – Hotel Solutions 2014

The area surrounding SDNP includes the adjacent coastal strip with the cities / towns of Southampton, Portsmouth, Chichester and Brighton. These provide most of the available visitor accommodation. There are several traditional seaside resorts in various stages of regeneration and reinvention, including a desire to make more of existing walking routes which link coast and countryside. A strong cultural offer (built heritage, maritime heritage

[4] South Downs Visitor Accommodation Review – Hotel Solutions 2014

and contemporary arts), is available and the area benefits from a growing reputation for food and drink tourism (e.g. vineyards). To the north lie the Surrey Hills and High Weald AONBs, which have similar walking, cycling and relaxing opportunities to SDNP.

For promotional purposes the destination offer is not joined up in a meaningful way. There are ten potential destination partner organisations covering the SDNP area. These are of differing sizes, level of resource and responsibility, from fully operational Destination Management Organisations for Hampshire, Brighton and Eastbourne (including Lewes district), to smaller, mainly local authority, areas focused on promotional websites e.g. Visit East Hampshire, Visit Chichester, Visit Horsham, Sussex by the Sea.

West Sussex County Council is supporting a visitor experience marketing campaign www.experiencewestsussex.com. Mid-Sussex district council has financially supported the website Experience Mid-Sussex, in partnership with local accommodation and attractions, but otherwise has no resources for tourism. East Sussex County Council does not have a dedicated focus on tourism but it is rather seen an integral element of their economic development work.

Where resources are employed across the area, it is mainly on promotion rather than product development. The exception is events e.g. food festivals. [5]

2 Tourism future trends

VisitEngland has, as part of the Discover England Fund (DEF) initiative, looked at trends that are set to influence the travel and tourism industry in the years to come[6]. These include:

- **Economy.** Emerging markets are growing as a proportion of the total world economy and by extension as a proportion of global outbound tourism opportunities. Many are transitioning to middle-income status, expanding the population of potential international travellers. However, advanced markets remain crucial and still account for almost half of all world economic growth.
- **Globalisation.** Tourism tends to follow the economic cycle – when the economy grows, so does outbound tourism. The UK's tourist numbers have grown at a similar rate to the Western European average. But some of the fastest growth rates seen by tourist destinations have been in Asia.
- **Connectivity.** Connectivity is a significant factor in the process of consumers deciding where to take a holiday. According to The Office for National Statistics, out of the top 10 countries with the most inbound passengers into the UK in 2015, 8 are European. Geographical proximity is the main factor for the number of European visitors to the UK and connectivity is key when considering inbound visitors from long-haul destinations.
- **Precarious Living.** Whereas post-recession EU consumers were worried about economic issues – general economic situation, unemployment and inflation – by 2016, concerns had switched to immigration and particularly to terrorism

[5] Team Tourism desk research 2018.

[6] The Future Travel Journey: trends for future tourism product development (Foresight Factory Research for VisitEngland July 2017). https://www.visitbritain.org/future-trends

- **Demographics**
  - **The Ageless Traveller** - The face of the global consumer landscape is rapidly evolving as developed markets become aging societies. This is changing consumer behaviour, causing individuals to delay major milestones until later in life, or to repeat them and to live in more mixed generation or solo households. As people are living longer and more active lives, while adhering less and less to a traditional order of key lifestages, it is becoming less relevant to think about travellers in terms of their age and more in terms of their interests.
  - **The Solo Traveller -** It used to be the case that in most consumers' lives periods of solo living were concentrated in young adulthood and later life. However, today, as lifestages become more flexible and traditional milestones like marriage get shuffled, postponed and even repeated, consumers are experiencing living on one's own across any number of points in their life – bringing with them all the related consequences of single living into their leisure activities.
- **Consumer trends**
  - **Filter Bubble -** Despite the endless resource offered by the internet, future travellers will live in a filter bubble created by personalisation algorithms and homogenous social networks. Tourism products will have to work hard to stay on the traveller's radar.
  - **Maximising behaviour -** Value, for future travellers, will be about more than price. They will opt for trips that allow them to collect as many unique experiences as possible on their journey, without having to invest considerable time and money in getting about.
  - **The death of risk -** With limited budget and holiday time available, future travellers want to find out as much as possible about **their** destination before getting there. They expect travel providers to empower them by providing enough upfront information about tourism products.
  - **Wishlisting -** Future travellers will expect to be able to more easily take the step from inspiration to purchase, by shopping directly from wishlists and a range of new interfaces such as smart TVs.
  - **Conversational Commerce -** Making enquiries about or booking tourism products will be easier than ever for future travellers, as they will not even have to leave their own messaging apps to do so. There will be less need for tourism products to develop their own expensive apps or websites.
  - **Impulsive Existence -** Fuelled by the fear of missing out, a desire to travel like a local – not a tourist – and a growing comfort with mobile purchases, future travellers will more often prefer to book tourism products once they are at their destination. Products that do not accommodate this behaviour might increasingly be overlooked.

- **Locational living -** In a future with better connectivity, location-based technology will help raise awareness of and increase engagement with tourism products by pushing content based on an individual traveller's whereabouts.
- **Performative perfection -** Future travellers are social media conscious and will have a strong preference for tourism products that are 1) contributing to their social capital/worth sharing; and 2) easily shareable.
- **Mastering the mind -** Highly aware of the pressures of modern life and the harmful impact this has on their personal wellbeing, relaxation will be a key motivation for future travellers. However, a real digital detox will still be a step too far for most!
- **Pursuit of real -** Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their "tourist" stamp and experience their destination like a local instead.
- **The leisure upgrade -** Skill-seeking future travellers will prefer tourism products that combine fun and an opportunity for learning or self-improvement.

3 Visitors and the SDNP – the current situation

This section provides an overview of current understanding of visitors and the South Downs National Park. It looks at visitor characteristics and activities, non-visitor characteristics, awareness of SDNP, and perceptions.

3.1 Visitor Characteristics and Activities

This section provides an overview of the characteristics of leisure staying and day visitors to SDNP. This is based on data from combined surveys of visitors to SDNP undertaken in 2012, 2014, and 2015[7]. More detail is provided in appendix 1.

Visitor type:

- The majority of these visitors to SDNP were day visitors - 78%.
- Staying visitors accounted for 22% of leisure visitors. They tended to be staying in the area outside the SDNP (78%) with a small proportion staying in the SDNP (22%). Those staying outside the National Park were generally staying in Hampshire, or Sussex (67% of staying visitors). Visitors were typically staying for a short break of two to three nights (about half of staying visitors) with about a fifth staying long (4-7 nights).

Frequency of visit:

- Over half (60%) were frequent visitors – visiting at least once every six months.
- Just under a fifth were first time visitors (18%). This was higher among staying visitors (50%) but a tenth of day visitors were also first-time visitors.

Origin:

- Three quarters of visitors were local (from Sussex, Surrey or Hampshire) – 89% of day visitors were from these areas.
- Staying visitors were from a wider catchment – nearly half (45%) were from a local or regional catchment (i.e. London and surrounding counties including Oxfordshire, Wiltshire and Essex). About a third were from the rest of the UK, with a fifth (22%) from overseas.
- Overseas visitors accounted for 5% of the market – key countries were, in order Germany, the Netherlands, Australia, the USA and France.
- The overseas market is less likely to stay in the SDNP (14% of overseas visits) than UK visitors. While this market predominately stays in surrounding counties (particularly Sussex and Hampshire), it is more likely than UK markets to stay further afield with nearly 20%) in London, Kent or another area.

Party type:

- Couples were the most common party type (37%) – particularly among staying visitors (47%).
- Families accounted for 28% of visitors – but they were less likely to be staying visitors (23% of staying visitors described themselves as families).

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[7] Interviewing took place at 'honey-pot, sites in the SDNP and at peak visitor times. As such, there may be some bias in the data, an over-representation of groups visiting at these sites and times (families could be an example). Day visitors exclude people undertaking routine domestic activities in SDNP.

- Three quarters (75%) of visiting parties did not have children in them. This was higher among staying visitors (82%).

Age

- Day visitors were relatively evenly spread across all age groups. Staying visitors were more likely to be from older age groups (55 years+)

Socio-economic groups

- The SDNP was attracting a high proportion of ABs (34% compared to 27% in the general UK population). C1s were also over-represented (37% in SDNP compared to 28% (in the UK).

Ethnicity

- Visitor were overwhelmingly white (99%).

Health

- Nearly a tenth (8%) of visiting parties contained someone with a health issue or disability.

Main Influence to visit

- Key influences on a decision to visit were cited as a walk (30%), visiting an attraction (20%) fresh air / views (10%), take the dog for walk (8%) and meet with friends and family (6%).
- Adventure or special interest sports (like horse riding, paragliding, fishing) were niche activities (typically 1% or less of visitors – although this could be influenced by interviewing locations within surveys). Cycling was more popular among day visitors (4%) and walking/riding the South Downs Way was more of a factor among staying visitors (7%).
- Events and eating out / going to the pub were not significant main influences on the visit decision.

Other Activities / influences

- Generic factors like fresh air and views, eating out, going for a walk and finding peace and tranquillity were all common other influences on the visit decision.
- Ease of getting to SDNP was also a factor – particularly for day visitors.
- More specific activities, for example, visiting a cultural or heritage attraction (11%), cycling 7%), the South Downs Way (5%), events (4%), adventure or special interest sports (3%) were important but more niche.

3.2 Awareness and perceptions

Research[8] into awareness among the UK population highlighted:

- 11% of respondents identified the South Downs (in an open question) as a British National Park. As a comparison, the Lake District was 60%, and the New Forest (a potential competitor) was 24%. Lack of awareness of SDNP will partly reflect its relatively recent designation.
- About half of respondents (48%) had visited a National Park in the last 12 months – 5% had visited the SDNP. For residents of the South East this was 22% (compared with 33% for the New Forest).

In the core catchment area for the South Downs National Park[9] (i.e. south and west London and the counties immediately around it), there was a higher penetration – 46% of people taking UK short breaks and day trips had visited SDNP in the last five years (see appendix 2).

3.3 SDNP strengths

Research has identified that the SDNP has many strengths which visitors value (see Appendix 1 and 2[10] for more detail). The core of these was the **scenery** and the **picturesque** environment, and, allied to this, the gentle countryside (described by many visitors as rolling and easy).

Also important was the **peace and quiet** (and being off the beaten track) that SDNP affords to visitors, and an opportunity to relax - often the antithesis of their normal lives.

Linking to the countryside element, **walking** was a noted driver. A final core strength for many visitors (but not all) was the **ease of getting to** the SDNP. For people in a certain catchment area, the SDNP is the closest area of major countryside.

[8] Awareness of the SDNP – undertaken by YouGov in 2016

[9] From the visitor and non-visitor research undertaken as part of this project (see appendix 2)

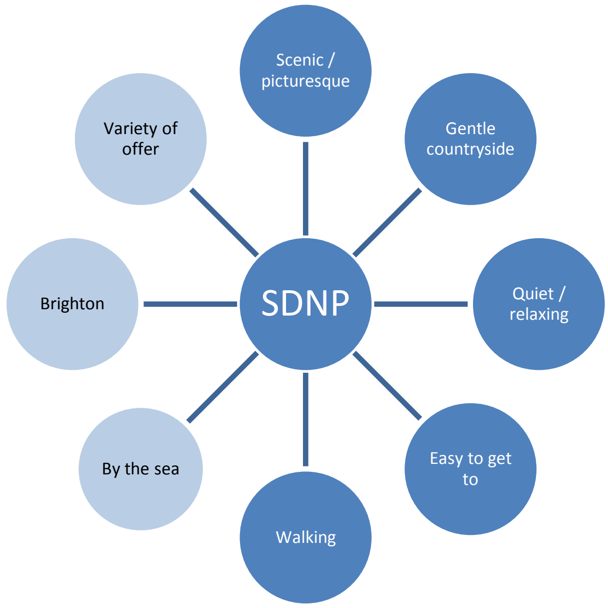
[10] Research of visitors to the SDNP (appendix 1) highlights some strengths in the appeal of the SDNP. The research into visitors and non-visitors (appendix 2) tested factors in destination choice, associations with the SDNP and what visitors liked about the SDNP. This section is drawn from that analysis.

Chart 2: What visitors liked about the SDNP[11]

[11] From the visitor and non-visitor research undertaken as part of this project (see appendix 2)

These strengths are summarised in chart 3 (below). Core strengths are highlighted in dark blue. There are also some potential strengths (illustrated in the lighter blue). These are not universal but did emerge from visitor research. They include the variety of the offer (both within the SDNP, and in the surrounding area), the proximity to the sea and coast, and the proximity to Brighton (less so Winchester and Eastbourne).

Chart 3: Strengths of the SDNP



A comparison of elements that are important in destination choice with the potential SDNP offer (see appendix 2) highlights a shortfall in some areas. For example, destination elements like the range and variety of things to do in the destination and in the surrounding area, and being by the sea are potential strengths for SDNP, in that they are highlighted by visitors as strengths and the SDNP is positively associated with these elements by the potential market. However, the strength of that association falls below their relative importance as factors in destination choice – reflecting a gap of need and perceived offer.

The same applies to elements like high end restaurants/gastro pubs, and choice of quality accommodation – these are relatively important factors in choosing a destination but the SDNP is not as strongly associated with them.

3.4 Competitive positioning

The research into visitors and non-visitors (see appendix 2) tested, for a range of different short break types, how the SDNP compared in terms of destination preference against eight potential competitors.

The SDNP scored most strongly as a destination for:

- Walking breaks
- Relaxing breaks
- Adventure sports breaks.

For these three break types the SDNP was identified in the top three preferred destinations. When scale of interest in a break type is compared against interest in the South Downs, **relaxing** breaks and **walking** breaks have the largest potential for the SDNP.

The **New Forest** and the **Cotswolds** are competitors for the South Downs for these break types (see appendix 2).

The research into visitors and non-visitors (appendix 2) highlighted that the South Downs had a weak appeal for the following break types: family, indulgent, sightseeing and city. Among the eight competitor destinations tested, the South Downs was rated in the bottom two for these break types.

3.5 Non-visitors

The level of data available on non-visitors is not as strong as it is on visitor groups. The research into visitors and non-visitors (see appendix 2) does however provide some findings. From this research, two broad groups can be identified:

- Those that are **potentially** interested in visiting the SDNP. Reasons cited by this group for not visiting include a lack of awareness and/or knowledge on the SDNP, or 'just not got around to it'.
- Those that are **unlikely** to visit. This group are active rejecters of the SDNP (i.e. 'not interested') or have barriers to visiting (e.g. 'can't afford it' or travel / distance related issues).

The potentially interested group was the larger of the two – they represented 34% of all survey respondents. The 'rejectors' represented 20% of respondents.

The potentially interested group were similar in many ways to existing visitors in in terms of demographic characteristics, preferences for different holiday/short break types, and factors in destination choice. There were some differences – for example, the potentially interested non-visitors were more likely than visitors to:

- Be from younger age groups – particularly 25-34 but also 34-45.
- Consequently, be younger families or younger couples
- Be interested in family breaks and /or city breaks.

Further research would be useful to explore the barriers to visiting among this group – e.g. the extent to which lifestage, destination appeal, and other factors impact on non-visiting, and what opportunities exist to translate them into visitors.

4 SDNP – Competitor and Comparator Analysis[12]

Consumer research (appendix 2) identified two key competitor destinations that visitors may consider over the SDNP - the Cotswolds and the New Forest. Both these areas have established market profiles, and enjoy the benefit of strong consumer and travel trade awareness, as well as presence in mainstream and digital media. VisitEngland[13] lists them as world-renowned 'attract' brands, helping to encourage visitors to travel and spend more widely across the country.

The National Forest (which covers parts of Leicestershire, Staffordshire and Derbyshire) and the Chilterns AONB are potential ***comparators*** to the SDNP. Both destinations have organisations that focus on awareness raising to support the visitor economy, and represent dispersed geographical areas that cross multiple political boundaries. All four destinations have different priorities and take different approaches to managing tourism. Appendix 3 provides more information on all four destinations.

4.1 Relationship with Destination Management Organisations (DMOs) / Private Sector Stakeholders

Each area takes a different approach to destination development and growing the visitor economy – demonstrating a combination of history, opportunity, realism and pragmatism.

The **Chilterns** Tourism Network is a private tourism company that fulfils a Destination Marketing role that would otherwise fall to the Chilterns Conservation Board's 'People and Communities Officer'. It was set up and supported by the Chilterns Conservation Board. There is no visitor management plan or official DMO status but the Network seeks to maintain good relationships with neighbouring DMO's, while accepting there is a certain degree of overlap. Operating a non-fee-paying model removes the perception of competition for limited funds. Chilterns Conservation Board will approach businesses on a project by project basis e.g. to gain match-funding for festivals.

The National Forest has a destination management role, rather than a marketing one. It has developed strategic partnerships with the three surrounding/overlapping DMOs. The company has signed a Memorandum of Understanding (MoU) with each DMO to lead on key pieces of activity for the benefit of the Forest e.g. short breaks development, business support etc. This is an innovative approach to working together and was designed to remove tensions over funding approaches to businesses. It is currently too early to assesses success.

Long before National Park designation, **New Forest** District Council provided the tourism marketing role and set up the business networks which underpin a successful visitor economy. Go New Forest was launched in 2017 as a not for profit Community Interest Company (CIC) to develop a 'Forest First' approach to tourism – supported by the National Park Authority, Forestry Commission and district council as partners.

[12] Team Tourism desk based and primary research. 2018

[13] Strategic Framework for Tourism 2010 – 2020 - VisitEngland

The **Cotswolds** Conservation Board pursues a policy to persuade the AONB's 15 local authorities to work collectively. In 2015, two of them came together through a shared service agreement and a new website was launched. However, the fledgling Cotswolds DMO is not well resourced. It does not enjoy a similar level of focus from the larger public-sector DMOs that have a tourism remit for their destinations e.g. Bath, Bristol, Gloucester. For these, the city offer takes precedent over the rural offer.

In areas without a strong tradition of collaborative working (either between the public-sector authorities, DMOs or the tourism and hospitality sector), the destination has suffered from low awareness or a proliferation of un-coordinated approaches to marketing with issues around the messages, scope and accuracy of such information, and the potential for visitor confusion. The Cotswolds is an example, with several destination websites:

- www.Cotswolds.info – private sector
- www.visitcotswolds.co.uk – private sector
- www.cotswolds.com – public sector (two of the 15 local authorities)
- www.cotswoldsaonb.org.uk – Cotswolds Conservation Board (AONB focused communications)
- www.escapetothecotswolds.org.uk – Cotswolds Conservation Board (visitor focused communications).

4.2 Tourism Positioning

Location awareness
In terms of awareness, one commonality of landscape areas is the need to geographically position and anchor them. All four areas have achieved this by referencing two or more large/better-known towns or cities e.g. The Chilterns is located between London and Oxford. Without this locator prompt, it is difficult for non-local visitors to identify where they are.

Core positioning
The core appeal of each of the destinations is encapsulated in the following statements:

- "We're creating a new forest for the nation and we can't wait for you to see it. Spread over three counties, The National Forest is a wonderfully varied landscape that is greening the heart of the country. You'll find plenty of things to see and do and places to stay for a short break in and around our 200-square mile Forest. Whether you're looking for bushcraft experiences, family fun days out or woodland walking and cycling trails, The National Forest has so much to offer." – Visit National Forest
- "Escape to a world a million miles from your everyday life where ponies, cattle, donkeys and deer roam free... and all just 90 minutes by train from London." - New Forest
- "Welcome to the naturally outstanding Chilterns. Why should you visit the quintessential, uncrowded, rolling green English countryside of the Chilterns, with its impressive selection of pubs and restaurants? That question may well have all the answers you need." Visit the Chilterns

- "The Cotswolds Area of Outstanding Natural Beauty includes some of the most beautiful countryside in England and is a wonderful place to visit and explore at any time of year. Visit the Cotswolds for a truly peaceful and relaxing holiday - get away from the crowds and explore the quieter tracks, hidden villages and secret corners." – Escape to the Cotswolds

4.3 Product Development

Investment in product development creates reasons for people to visit. All four areas have limited resources, and look for opportunities to work in partnerships. Most often this development work relates to sector development e.g. food and drink, or to growth of events. Where possible, applications for project funding are pursued e.g. through LEADER, HLF.

The spring/autumn Chilterns Walking Festival is a good example of product development, (a collated programme of planned walks supplemented by Conservation Board and Chiltern Society arranged themed walks), but it is also touches on audience development and sector collaboration. LEADER funding enables an external part-time project manager and PR resource to deliver the festival, which encourages people to explore new areas and encourages people new to walking as two core objectives.

The National Forest leads on projects to create new tourism infrastructure to bring people to the Forest e.g. the National Forest Way long distance walking trail, a youth hostel, and a cycle centre and hub – where the company was the accountable body to facilitate the development. It also formed a partnership with a festival producer to develop a new National Forest festival, Timber, to create additional overnight stays.

The clichéd view of the Cotswolds as 'Quintessential England' is a common brand perception, and something the AONB is keen to move beyond. The feeling is that the villages dominate, and the landscape is missed. Product development centres on raising awareness of distinctive elements of the local offer (foods, the arts and cultural scene), and encouraging exploration of the landscape beyond its pretty villages.
An integrated train/bus ticket is the principal means used to encourage visitors to connect with the wider Cotswolds landscape. A focus on events has seen the introduction of the biennial Living Landscape Festival in partnership with a National Trust property, joining a programme that includes the annual sheep and wool day celebrating the Cotswold sheep, Outdoor Theatre and a camping weekend. Product improvement work is also supported through Caring for the Cotswolds, a visitor giving scheme which has collected and distributed £20k in grants in the four years it has operated.

The New Forest promotes an App for walking and cycling routes which provides information in an easy to download and use format. It was developed by a local private sector company, and discussion is underway to expand the routes and area covered.

4.4 Marketing Focus and Activity

Marketing covers a mix of actions and level of sophistication, determined by available resources (budget and personnel) and the background of the person driving it i.e. a destination/marketing background, or someone with a communications or development background. In all cases the primary focus for activity is a local/regional catchment within a 90-minute drive time.

Resources – budgets and income generation

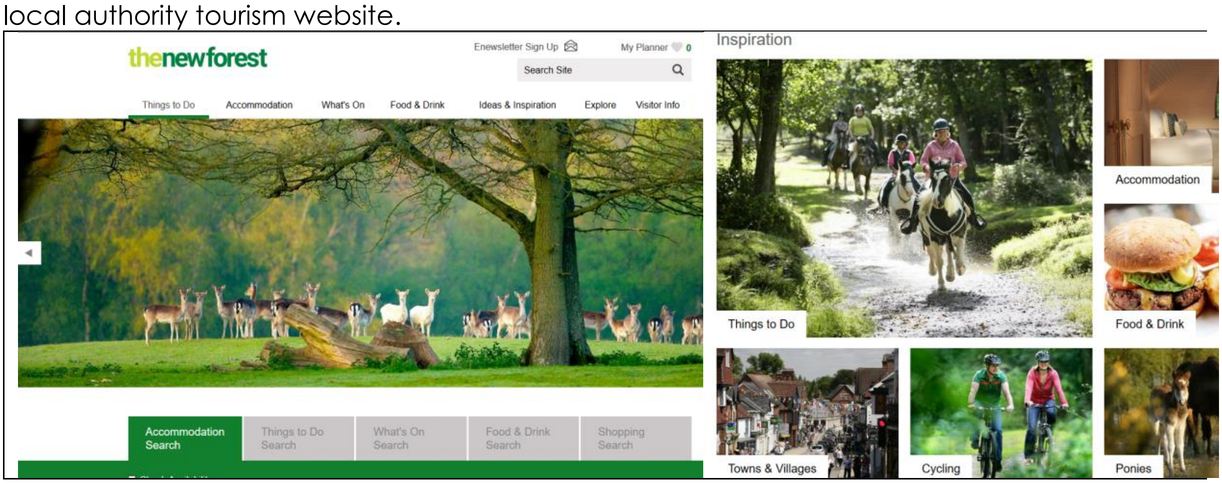
The New Forest CIC has just spent £35K on rebuilding www.thenewforest.co.uk and expects to spend £19K a year on hosting. The company budgets an annual £50K on Marketing which also includes all digital, media and press. The CIC generates income through membership/web adverts, inclusive of an annual investment subscription from around 200 businesses. Income is also earned from sales of adverts in the free in-destination Discover Guide (150K copies), adverts on 23 Visitor Info Panels and adverts in the Official Map & retail sales. Looking ahead, the CIC is developing other sales initiatives such as the Go New Forest Offers Card and a residents Forest Finder Directory.

The Chilterns Conservation Board has core budget available for the corporate www.chilternsaonb.org website and for the annual Outstanding Chilterns magazine (with costs off-set by advertising). There is a part time communications officer to support core work. For anything else, it must build marketing activity and support resources into budgets e.g. the Hillforts project, Chilterns food festival, Chilterns walking festival (£40,000 from Leader with requirement to raise £10,000 sponsorship.)

No other up to date figures were available.

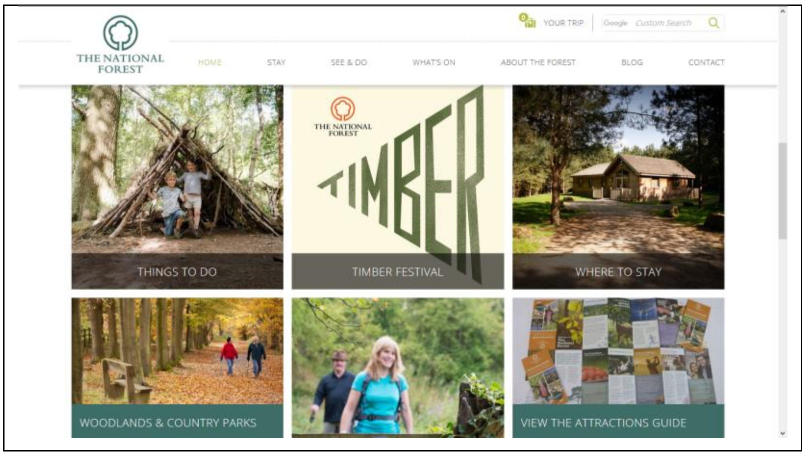
Visitor facing collateral
Digital is at the forefront of visitor information; print is either under review or being phased out. All four have AONB/NPA websites, as well as a dedicated visitor focused website that provides the experiential information increasingly sought.

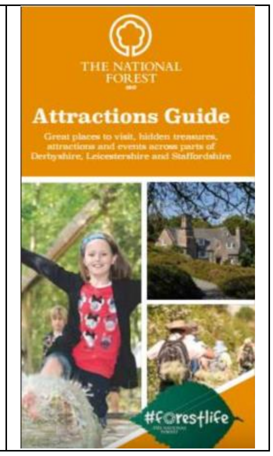
For the **New Forest**, the website www.newforestnpa.gov.uk makes 'Visiting' a navigational priority with dropdown menu. The focus is mainly walking, cycling, riding, with wider tourism experiences left to Go New Forest www.thenewforest.co.uk which is the original, revamped local authority tourism website.



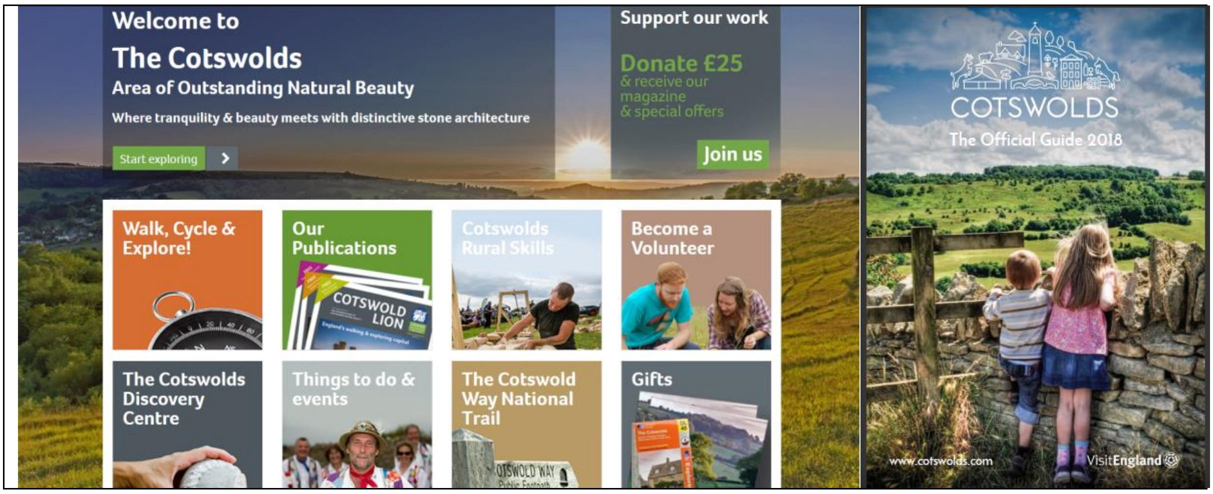
The Chilterns Conservation Board website www.chilternsaonb.org makes 'Explore and Enjoy' and 'What's On' highly visible navigation points and focuses on walking and cycling. It covers visitor facing as well as wider AONB information and is aimed at people from Oxford/London with an appreciation and enjoyment of the landscape. The main tourism emphasis goes into www.visitchilterns.co.uk, including promotion of Chilterns Conservation Board sponsored festivals. Manged by an independent tourism consultant, the focus is brand building, awareness raising, promotion of accessible clusters (market towns), themes of countryside, film, F&D and some heritage. Market focus is UK and Local, as well as inbound visitors to London from Nordic and western European countries.

The National Forest has a 30k database and sends regular newsletters. As with the others there is a National Forest Company website www.nationalforest.org, and a visitor facing one www.visitnationalforest.co.uk.





Concerned that AONB messages were not reaching enough people, **Cotswolds** Conservation Board has decided to merge the AONB site www.cotswoldsaonb.org.uk and the visitor focused www.escapetothecotswolds.org.uk. From 2018, Visitor information will sit at the heart of the new website.



Social media presence
All destinations use Facebook (primarily) and Twitter for social media communication. Other channels are visible, e.g. Google+; Pinterest, though no longer actively managed. The Cotswolds has a YouTube channel and uploads storytelling videos regularly, gaining on average 20k views each. All activity is delivered by the communications officer, who has a professional background and interest in film production and editing.

Social media activity reflects available resources. Managing social channels effectively is time consuming and the feeling is it is better to do one or two well, than stretch too thinly.

Visibility in third party collateral
Of the four comparators, only The National Forest takes a proactive approach with third party visibility. It is looking to work with Airbnb, (given the proliferation of listings within the Forest area) on how to improve listings, photography and how the forest is described.

Awareness raising
With the explosion in freelance writers and online influencers, it is prudent to create a media section for easy access to royalty free images, story ideas and facts. Only the more overtly tourism focused websites provide this. Visit the Chilterns provides a press section with royalty free images, press releases and a press kit to encourage more media coverage. www.visitchilterns.co.uk/press.html. The National Forest engages with proactive press and PR to shape and target messages in line with its brand values.

4.5 Key points

- The four destinations have adopted different approaches to the co-ordination of destination development. Focusing on the promotion of a cross boundary landscape over separate towns / administrative areas has been a big challenge in some areas. The National Forest has largely succeeded but the Cotswolds is still working to a more integrated position.
- The need to reference the location of landscape area to key towns and cities for non-visitors was a common theme. For the **South Downs**, this reference will vary depending on audience – e.g. it could be 'between London and Brighton' for distant

markets, or more specific reference points (Guildford, Winchester, Eastbourne, Brighton for regional markets.

- There was some commonality in the positioning of the destinations – e.g. escape, relax, peaceful, uncrowded were common themes.
- Destinations were involved in product development – events and thematic development (food, drink, arts and culture) were common but others included infrastructure, an integrated train/bus ticket, and a walking / cycling app.
- The promotion focus is typically on a 90-minute catchment area. For the South Downs, this would be primarily a focus on London and the M3/M4 corridors. All the destinations have separate visitor focused websites, and undertake social media activity (typically focused on own or two channels). Other promotion tools include use of third party collateral, and awareness raising PR.
- The Cotswolds have adopted visitor giving schemes, and The National Forest have adopted a business contribution model.
- Time and consistency of activity has been important – The National Forest has been 26 years in development, and the New Forest has been promoted for more than 30 years by the District Council.

5 The SDNP's visitor segments

5.1 Introduction

There are a variety of ways to segment a destination's market – by origin and /or postcode related (e.g. Mosaic), socio-demographic and lifestage characteristics, psychographic, day/staying, activities undertaken (walking, visiting attractions etc.) and motivations (relaxation, time with the family etc.). For the SDNP not all this data is available.

Data is available on types (i.e. day, staying) visitor origins, characteristics (e.g. age, party composition, frequency of visit) and, to some extent, activities. The existing SDNP markets are complex and there are multiple ways to divide them. A two-stage approach to segmenting the market for the SDNP has been adopted:

- Stage one has identified nine **primary** segments from SDNP visitor survey data. These are based on two dimensions – visitor origin and their main primary activities. These are outlined in section 5.2 below. These segments represent the totality of the SDNP's markets;
- Stage two identifies more specific **target** segments (based on several principles - outlined in section 5.3) and provides further details on these segments (see section 5.4 below).

5.2 Segments - overview

The following table (table 2) summarises the main nine leisure segments and their relative volume and value.

Segment volume relates to the approximate proportion of leisure trips to the SDNP that each segment makes – this is based on data from the SDNP visitor surveys. Segment value is based on applying an average spend per trip to these groups[14]. For staying visitors that are staying outside the SDNP, only expenditure potentially accrued in the SDNP is included in the value figure.

The segments are based on two broad criteria – their place of origin and the broad purpose of their visit based on their main activities. In the following table these are divided into two broad groups. 'Actives' (coloured in green below) who are visiting for an outdoor activity – typically walking but also cycling and niche sporting activities (e.g. paragliding, riding, fishing). Sightseers and 'potterers' (coloured in blue) are coming for different reasons that include visiting attractions, seeing the sites, attending events, meeting friends, having a meal out, and shopping.

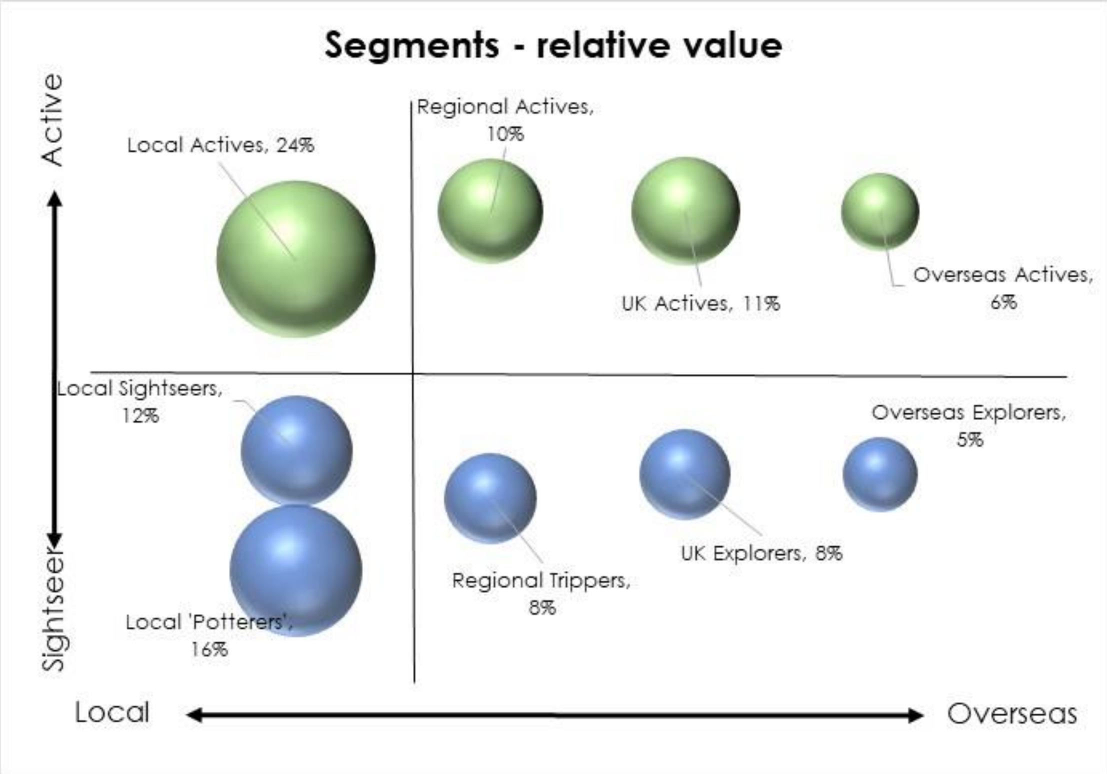
[14] Based on data from the GB Day Visitor Survey 2016 (GBDVS) and GB Tourism Survey 2016 (GBTS).

Table 2: SDNP Primary Segments				
Segment	**From**	**Primary purpose**	**% share**	
			Segment volume	**Segment value**
Local Actives	The immediate surrounding area (Sussex, Surrey, Hampshire)	Outdoor activities, fresh air and views.	46%	24%
Regional Actives	Primarily from the London, Kent, Berkshire area (three-quarters) but a quarter are from counties beyond this area (e.g. Essex, Wiltshire, Bucks, Berks, Oxon).	Outdoor activities, fresh air and views.	8%	10%
UK Actives	Rest of UK (i.e. beyond the South East	Outdoor activities, fresh air and views.	5%	11%
Overseas actives	Overseas (key ones are Germany, France, Netherlands)	Outdoor activities, fresh air and views	3%	6%
Local Sightseers	The immediate surrounding area (Sussex, Surrey, Hampshire)	Visiting attractions and attending events	11%	12%
Local 'Potterers'	The immediate surrounding area (Sussex, Surrey, Hampshire)	Range of reasons – e.g. meet friends, visit restaurant / tea room, picnic, shopping, relax	16%	16%
Regional Trippers	Primarily the London, Kent, Berkshire area (two thirds) but a third are from counties beyond this area.	Visiting attractions / events, or pottering – i.e. meeting friends, visiting a restaurant / tea room, relaxing	5%	8%
UK explorers	**From**: rest of UK (i.e. beyond the South East	Primarily sightseeing, but also seeing friends	4%	8%
Overseas explorers	**From**: Overseas (Germany, Netherlands, Australia)		2%	5%

Appendix 1 provides more details of these segments.

The following chart (chart 4) summarises these segments on their two principal dimensions – activity/motivation and origin – and highlights relative value.

Chart 4: Primary segments – relative value



Key points:

- Local segments (from the Hampshire, Sussex, and Surrey area) account for over half of the estimated value of leisure visits to SDNP (and nearly three quarters of leisure visits).
- Regional and the rest of UK markets are a similar size (about a fifth each)
- 'Active' segments (walkers, cyclists and other outdoor activities) account for half of overall leisure visitor value to SDNP. Less active segments (i.e. sightseers and potterers) account for about the same value.

5.3 Segment Prioritisation Principles

The following principles have been used to prioritise target segments:

- **Economic Impact** – the driver for segment prioritisation is to add value to the local economy. This can be achieved by generating additional value per trip and more trips. Ideally target audiences should:
- be relatively high spending per trip;
- stay overnight;
- stay longer;

- visit outside peak times – generating more peak time visits would create displacement of existing markets and not necessarily generate additional impact
- be encouraged to visit different areas of the National Park to spread the benefit and;
- be primarily driven in their destination and experience choice by the SDNP, rather than the surrounding area (which is a different proposition).
- **Resources and reach –** target segments must be reachable and influenceable in a cost-effective way. However, available resources within SDNPA and its partner organisations are limited for tourism promotion and destination development.

  Key tools that are available are summarised in the following table. This also highlights the resource (personnel and finance) ability of SDNPA and partners to work with these tools to reach audiences (These have been scored by TEAM TOURISM on a subjective basis - 4 is very likely to be able to use, 1 is low), and how influential these tools could be (4 is very influential / targeted, 1 is 'broad brush'). The final column of the table provides an overall priority score (this is based on multiplying the scores for 'resources available' and 'influence' together.

Table 3: Potential Promotion and Development Tools

Promotion / development tool	**Resource to execute (A)**	**How targeted / influential (B)**	**Priority score (AxB)**
Third party websites / guidebooks (e.g. Lonely Planet, TripAdvisor)	4	3	12
Destination website & content generation	3	3	9
Search Engine Optimisation (SEO)	2	4	8
Partnerships (i.e. supporting / working through private sector/ Local Authority partners)	4	2	8
Direct to travel trade	2	4	8
Social Media (Facebook, Twitter etc).	2	3	6
PR – awareness raising	2	3	6
Thematic product and itinerary development (e.g. walking, food).	3	2	6
Direct marketing – CRM database	1	4	4
Advertising (digital / traditional)	1	4	4
In-destination (print, app, TIC, web)	1	3	3
Policy (planning) and business support	3	1	3

The key tools that could be used include third party websites, and a destination website. Others include Search Engine Optimisation, direct activity to travel trade and networking activity, supported by awareness raising PR, social media, and product development.

- **Competitive advantage** – the visitor / non-visitor research (Appendix 2) identify that key strengths of the South Downs include **scenery** and the **picturesque** environment, the gentle **countryside**, the **peace** and quiet and the **walking**. However, this research and the competitor analysis (section 4) identifies that while the South Downs is not perceived as having the same draw as other destinations – particularly the New Forest and the Cotswolds - it does have strengths in its offer in terms of 'Walking' and 'Relaxing' product, and has potential competitive advantage over destinations in terms of its ease of access. The concept of 'Our (National) Park' is a potential USP. Returns will be greater from segments that have a fit to these strengths and advantages.

- '**Pushing at an open door**' – linked to the previous points, there is a logic to 'push at an open door' – i.e. target segments that are:
- receptive to potential messages (see competitive advantage above);
- more likely to be aware of the South Downs and its offer, or have visited before;
- and share the characteristics of existing visitors (on the basis that the current market will not be saturated).

5.4 Target Segments

This section looks at the primary segments identified in section 5.2 and rates them based on several criteria. These are:

- **Appeal –** this relates to the appeal of the segment **to** the SDNP as a destination. This is based on a combination of the overall value of the segment, its spend per trip, its loyalty (and potential for repeat business) and potential for off-peak business.
- **Attractiveness –** this relates to the attractiveness **of** the SDNP as a destination to the segment. This is based on the relative competitiveness of the SDNP and segment awareness and knowledge.
- **Acquisition potential** - the ease of reaching / acquiring the market, and the potential additionality from that segment.

Each of the primary segments has been rated on a score of 1 to 5 against these. A score of 1 corresponds to low attractiveness, appeal or acquisition potential, whereas a score of 5 equates to high attractiveness, appeal, or acquisition potential. The scores are relative to each of the segments listed and are based on TEAM TOURISM's judgement and interpretation of available research.

The scores are summarised in the following table:

Table 4: Primary Segment Prioritisation

	Appeal to SDNP	Attractiveness of SDNP	Acquisition Potential	Total
Local Actives	4	5	1.5	10.5
UK Actives	3	1.5	3	7.5
Regional Actives	3.5	4	3.5	11
Overseas Actives	2	1.5	2.5	6
Local Sightseers	2.75	3.5	2.5	8.75
UK Explorers	2.25	1.5	2.5	6.25
Overseas Explorers	2	1.5	2.5	6
Regional Trippers	2.75	3	3	8.75
Local 'Potterers'	3.75	3.5	1	8.25

The **Regional Actives** segment emerges as the highest scoring segment across the three criteria. This should be the principle strategic target audience for the following reasons:

- It is a sizable market segment (about 10% value of the current SDNP market) with growth potential;
- The SDNP has competitive advantages within this market – based on its proximity, product and levels of awareness;
- It is a relatively loyal audience with good spend per head.

The Local Actives and UK Actives also have potential. They share many similar characteristics and can be regarded as 'Slipstream' segments. A 'slipstream' segment is a segment that will potentially be influenced by marketing and development activity targeted at Regional Actives.

Local Actives, while a large and loyal segment, are less attractive based on a lower spend per head (they are day visitors) and will create less additionality (on the basis they are likely to be coming anyway). UK Actives are higher spending segment (they are mainly staying) but they are less loyal and SDNP has a lower competitive strength in this market.

The **Overseas** markets are the lowest scoring segments. However, they are a potential **tactical** target segment based on current English National Park work through the Discover England Fund (DEF) that is targeting overseas markets (notably the German and Australian Active Explorers segments).

The rationale for tactical activity within overseas markets includes:

- This segment fits with the Discover England Fund that the English National Parks are already involved in so there are economies of scale / support in some activity areas
- There is potentially a direct route to market via the Travel Trade
- Geographically the South Downs is well located – close to London and major gateways into the UK.

The German market would represent the primary overseas target audience since it:

- Is currently the largest overseas market for the SDNP;
- Is a DEF target audience;
- Is interested in visiting the rural South East (along with the South West) and currently a big holiday market for the region[15];
- Is the most likely overseas segment to consider short walks and/or National Parks[16].

While the German market is the primary focus, the Netherlands market is a potential secondary target audience – sharing many of the characteristics of the German market but smaller and more likely to travel independently. It has the disadvantage that it is not a target audience for the DEF project.

However, tactical intervention in the German market requires further market testing among the travel trade to assess potential interest in the SDNP and refine the market proposition.

The Regional Actives is a relatively broad segment and can be further broken down into five sub-segments. These are:

- Active adults
- Active families
- Hikers

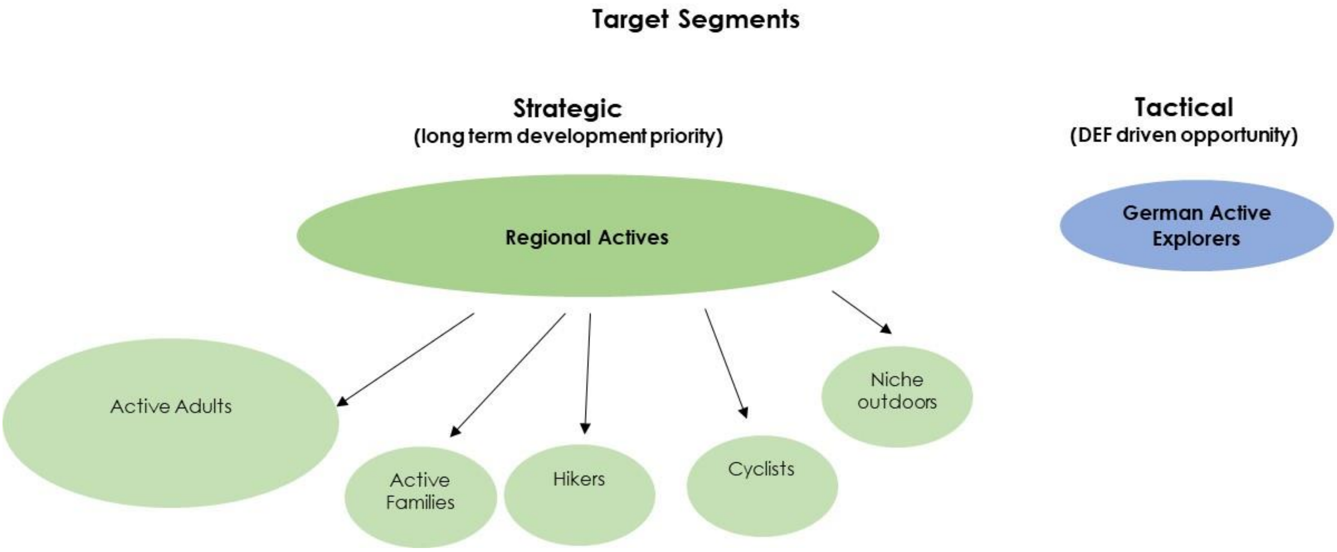
[15] Source: International Passenger Survey

[16] Source: Discover England Fund Research Summary Report, VE 2017

- Cycling enthusiasts
- Niche Outdoor.

Target segments are summarised in chart 5 below.

Chart 5: Target Segments



Further details are outlined in the following tables.

Table 5: Target Segment – Active Adults	
Segment volume and value	This group represents approximately 70% of the volume of the Regional Actives segment It accounts for approximately 7% of value of total SDNP leisure markets.
Characteristics	This market lives in the region surrounding the SDNP – primarily London but also counties around London (Kent, Berks, Oxon, Bucks etc). The target audience is couples – mainly 50+, ABC1s with a reasonable disposal income. Generally, they are repeat visitors with some knowledge of the South Downs, but the segment will also contain first time visitors (who will have awareness but not knowledge).

	Their interests are in the countryside, and outdoor activities. For the majority, outdoor activities equate to relatively gentle walking (up to 3 to 4 hours) or cycling (up to 2 hours). This group is also interested in heritage and gardens, towns and villages, culture, nature and food experiences.
Motivations / activities	This segment is looking for relaxation, and peace and quiet in a countryside environment. Central to that relaxation is the concept of 'Easy Active Plus'. A key element of the trip will be an outdoor activity – mainly walking but also cycling – and the segment will be planning for this activity (unlike other segments where it may be incidental) However, the experience is likely to be more than this (especially for staying visitors) with an emphasis on the wider offer – good food and drink, sights and views, and heritage and sightseeing options. For staying visitors, quality accommodation (typically serviced but also potentially camping/glamping) are important.
Competitors	Key ones include The New Forest, Cotswolds, Suffolk Coast, Kent

Table 6: Target Segment – Active Families	
Segment volume and value	This group represents approximately 10% of the volume of the Regional Actives segment. It accounts for approximately 1% of value of SDNP leisure markets.
Characteristics	This market lives in the region surrounding the SDNP – primarily London but also counties around London (Kent, Berks, Oxon, Bucks etc). The target audience is families or mixed groups (family/friends) with children. Adults are mainly 35-55, ABC1s with a reasonable income. The level of repeat business amongst this segment is mixed – about half are infrequent or first-time visitors, and about half are relatively regular (at least once a year) with some familiarity Their interests are in the countryside, and outdoor activities. For the majority, outdoor activities equate to relatively gentle walking (up to 3 hours) or cycling (up to 2 hours).

	This group is also interested in heritage and gardens, culture, nature and food experiences.
Motivations / activities	This segment is looking for time with their family (and friends) but in a countryside environment. The concept of a healthy (and educational) trip is also an underlying theme. A key element of the trip will be an outdoor activity – mainly walking but also cycling. The experience be may be more than this (especially for staying visitors) with an emphasis on the wider destination – e.g. the South Coast. For staying visitors, quality accommodation (typically self-catering and camping/glamping) are important.
Competitors	There will be a wide competitor set for this market – e.g. similar destinations (like the New Forest) but also different destinations (e.g. resorts and coastal locations), and attractions and country parks.

Table 7: Target Segment – Hikers	
Segment volume and value	This group represents approximately 10% of the volume of the Regional Actives segment. It accounts for approximately 1% of value of SDNP leisure markets.
Characteristics	This market shares many characteristics with the Active Adults group. It lives in the region surrounding the SDNP – primarily London but also counties around London (Kent, Berks, Oxon, Bucks etc). The target audience is couples or friends. They are younger than Active Adults – mainly 35-60, ABC1s with a reasonable disposal income. Typically, they are repeat visitors with good knowledge of the South Downs. They will be self-motivated to find the type of information they are looking for (e.g. routes). Their primary activity will be hiking (3 to 6 hours in a day) – the South Downs Way is an important product for this group.
Motivations / activities	This segment is motivated by walking – it's all about the activity for this segment. The South Downs provides an excellent and convenient destination for them to experience that.

	This group is less interested (than Active Adults) in the wider destination experience. Food and drink (typically pub as opposed to restaurant) will be important. Accommodation will be Bed and Breakfast (and possibly camping).
Competitors	Key ones include The New Forest, Cotswolds, Suffolk Coast, Kent but also destinations further afield (the Peak District, Wales, the South West).

Table 8: Target Segment – Keen Cyclists	
Segment volume and value	This group represents approximately 5% of the volume of the Regional Actives segment. It accounts for approximately 0.5% of value of SDNP leisure markets.
Characteristics	This market shares some characteristics with the Hikers group. It lives in the region surrounding the SDNP – primarily London but also counties around London (Kent, Berks, Oxon, Bucks etc). The target audience is primarily groups of friends. They are mainly 35-60, ABC1s with a reasonable disposal income. Typically, they are repeat visitors with good knowledge of the South Downs. They will be self-motivated to find the type of information they are looking for (e.g. routes). Their primary activity will be cycling (2 to 4 hours in a day). This could be both road or mountain biking but the SDNP has stronger competitive advantage as a mountain biking destination.
Motivations / activities	This segment is motivated by cycling – it's all about the activity for this segment. The South Downs provides an excellent and convenient destination for them to experience that. This group is less interested (than Active Adults) in the wider destination experience. Food and drink (typically pub as opposed to restaurant) will be important. Accommodation will primarily be Bed and Breakfast.
Competitors	Key ones include The New Forest, Surrey Hillls, Kent.

Table 9: Target Segment – Niche Sports Activities	
Segment volume and value	This group represents approximately 5% of the volume of the Regional Actives segment. It accounts for approximately 0.5% of value of SDNP leisure markets.
Characteristics	This market shares some characteristics with the Hikers and Cyclists groups. It lives in the region surrounding the SDNP – primarily London but also counties around London (Kent, Berks, Oxon, Bucks etc). The target audience is primarily groups of friends. They are mainly 35-60, ABC1s with a reasonable disposal income. These are repeat visitors with good knowledge of the South Downs. They will find the type of information they are looking for through peers and specialist media (websites, social media, magazines). They will be undertaking a special interest activity in the South Downs – e.g. horse-riding, fishing, para-gliding.
Motivations / activities	This segment is motivated by their activity. The South Downs provides an excellent and convenient destination for them to experience that. Like hikers and keen cyclists This group is less interested (than Active Adults) in the wider destination experience.
Competitors	Will vary according to activity

Table 10: Target Segment – German Active Explorers	
Segment volume and value	This group accounts for approximately 1.5% of value of SDNP leisure markets.
Characteristics	Germans booking through the travel trade – either organised tours or Fully Independent Travellers (FIT). The audience will be couples (travelling without children) – typically 45-60. They will be ABC1s. The target audience shares the characteristics of two VE segments: Mature Experience Seekers and Outdoor Enthusiasts (and two South Downs segments – overseas actives and overseas explorers). They will be healthy and active, enjoy walking and hiking, and spending time outdoors but will also be interested in seeing the sights and experiencing local culture. They will typically be first time visitors to the South Downs but will have visited the UK before. This is not necessarily a London Plus market and it could be seeking a South West Plus concept with South Downs as the trip start/end point. Transport is likely to be by public transport, but some will be travelling by car as this market is unfazed by driving in the UK. They will generally be in the UK for a week.
Motivations / activities	They are looking for gentle adventure and walking, iconic sites and views and possibly parks and gardens. Food will be part of the experience (they will want to visit a pub and have an English Breakfast) but not a driver. Authenticity of experience (food, culture etc) and the ability to see the real country are drivers. The market is looking to go off the beaten track (or at least their beaten track – staying in a comfort zone is important). Accommodation will reflect this with an emphasis on non-branded hotels, B&Bs and, possibly, cottage options (for a 2-night break).
Competitors	Cornwall is the key competitor, but others include Kent, Devon and the Cotswolds. These could however be 'partner' destinations as part of the same two centre holiday

6 Market Propositions

6.1 Regional Actives

As the previous section identifies, the Regional Active segment can be subdivided into five groups. The primary focus should be on the Active Adults. This is the largest group and probably the highest spending (since it is more interested in the wider destination). The SDNP also has a strongly competitive product for this group.

The second largest Regional Actives group is the Active Families. While, SDNP does attract families they tend local and typically coming for sightseeing type activities. The Visitor and Non-visitor research (appendix 2) highlighted that the SDNP was not as appealing for family-breaks as other destinations (among the destinations tested South Downs had the second lowest appeal as a family destination). It does not emerge as a competitive strength for SDNP. The family market (as a distinct grouping) is not a primary target audience for the SDNP.

The market proposition for the Regional Actives (Active Adults) can be summarised in chart 6:

Chart 6: Regional Actives Market Proposition

team

More detail is provided in table 11.

Table 11: Market Proposition – Active Adults	
PROPOSITION	Breathing space on your doorstep
THE EXPERIENCE	Disconnect from day to day life and connect to the South Downs – the National Park on your doorstep. Relax and enjoy great exercise, expansive views and your own quiet open spaces within easy reach of home. Around each bend in the path, and at the top of every slope climbed, there are new views to embrace and subtle variations in the landscape, a fitting reward awaiting patient exploration.
BENEFITS	• Disconnect from everyday life – breathing space in a National Park. Rejuvenate and relax • Your space, your park • Easy to get to • Connect to your partner (family) and the countryside • Easy active • Great food, farm shops and country pubs, and pretty villages and market towns • Open rolling hills provide an ideal habitat for all kinds of wildlife.
PROOF POINTS	• About 90 minutes from central London • Undulating chalk landscape, and wooded and heathland ridges – good paths, easy wayfinding, the South Downs Way (a National Trail) • 2000 miles of public rights of way • Iconic views of the downs and the coastal plain – Seven Sisters, Devils Dyke, The Hangers…. • Mythical landmarks – Chanctonbury and Cissbury Rings • Wildlife habitat – Adders, slow worms and lizards, rare butterflies like Adonis blue and flowers like the round headed rampion (county flower of Sussex). • Provenance of local food and drink - world leading sparkling wines, artisan producers of craft beers, cheeses, chocolates, alongside farms shops, farmers markets and gastro-pubs.
ACTIONS AND CHANNELS	Actions and activity to develop this market will include: • Develop a specific website for the South Downs as a destination (separate from the SDNPA website which is focused on too many stakeholders)

	o Experience / itinerary driven – focusing on easy outdoor experiences o But cross-selling other experiences – food, sights o Capturing the stories o Facilitating and encouraging visitors to share their stories o Dynamic – reflecting events, changing seasons and providing a regularly refreshed offer o PR – programme of regional awareness raising PR including a programme of co-hosted media visits • Third party website monitoring and interaction (e.g. TripAdvisor)
SUPPORTING PRODUCT DEVELOPMENT	• Facilitating and encouraging accommodation development (Upmarket B&B, glamping, cottages) • Rights of way and circular walks • Joined up itinerary / experience suggestions – walk, pub, cream tea, scenic spot for photos • Events development
PARTNERS	DMOs covering the NP and boundary areas Tourism businesses and organisations interested in growing the visitor economy
SLIPSTREAM[17] SEGMENTS	Local actives UK actives UK explorers

[17] A 'slipstream' segment is a segment that will also be influenced by marketing and development activity targeted at Regional Actives

6.2 German Active Explorers

The market proposition for the German Active Explorers can be summarised in the following diagram:

Chart 7: German Active Explorers Market Proposition

Table 12 provides more detail:

Table 12: Market Proposition – German Active Explorers	
SEGMENT	German Active Explorers
PROPOSITION	Classic England – accessible less than an hour from your entry gateway
THE EXPERIENCE	Relax into your trip and experience classic England - a unique landscape and its culture less than an hour from your arrival/departure point. The South Downs is famous for its gentle rolling landscape with easy walking that afford iconic views of both the coastal plain and countryside.
BENEFITS	• Easy to get to • As series of gentle walking trails including the 100-mile South Downs Way National Trail

	• Iconic English landscapes – big vistas and iconic views of both coast and country • Heritage and culture – stately homes and gardens • Local food and drink
Proof Points	• Less than an hour by train from Gatwick to the SDNP (with additional travel time for the 'final mile') • Undulating chalk landscape, wooded and heathland ridges – good paths, easy wayfinding including the 100-mile South Downs Way • Iconic views – Seven Sisters, Devils Dyke, the Hangers…. • Historic houses and gardens – Petwood House, Arundel Castle • Inspiration of writers and poets – Alfred Lord Tennyson, Hilaire Belloc, Rudyard Kipling, Jane Austin and Virginia Woolf. • Market towns (Lewes, Petersfield and Midhurst) and picturesque villages like Selborne, Charlton and Alfriston • Food / drink product – Craft beers from the likes of Hepworth's Dar Star and Harvey's Brewery, Sparkling wines, farm shops at Goodwood and Cowdrey.

Actions and channels	• As part of the wider National Parks Discover England Fund, work closely with the German travel trade to develop saleable product in the form of itineraries / packages. This will include supporting tour operators in joint marketing activity.
	• Work with operators in and around the SDNP, particularly B&B operators, to develop itineraries. (The German market has a higher propensity to book packages than other markets – an average of 13% of visits compared to 7% for all markets).
	• Development of a number of SDNP itineraries. These need to be predicated around:
	    • Different durations – day, one or two nights.
	    • Itineraries should be positioned as the start (first destination) or end (last destination) of a longer trip (possibly packaged with the South West)
	    • Each itinerary should be based around one SDNP location (i.e. all activities within easy reach). Different itineraries can cover different parts of the SDNP.
	    • Easy public transport options – from (and to) central London and key entry points (particularly Gatwick and Heathrow). Providing guidance and options on the 'final mile' (whether taxi, or bus or private pick-up) is key.
	    • Short (up to two, possibly three, hours) circular walks

	• Non-branded accommodation – quality B&Bs, inns/pubs, small hotels, glamping – with rates • Sightseeing options – particularly around stately homes and gardens • Food in country pubs, and other recommended places to eat • Development of itineraries based around Brighton, Winchester and possibly Eastbourne (to be tested with tour operators). These would be centred around accommodation and transport options in these towns/cities with the SDNP as a day excursion. These would be positioned as the end point of a week's trip.
Supporting product development	• Encouraging and facilitating suitable accommodation development • Rights of way and circular walks
Partners	Neighbouring DMOs, businesses and operators
Slipstream segments	Overseas Actives and Overseas Explorers

6.3 TEAM TOURISM's recommendations for implementation and activity

1) The Regional Actives

This segment represents the best prospect market for the SDNP. The SDNP has competitive strengths in this market, it brings additionality and economic benefit, and it is a significant market that offers good growth potential. With limited resources, this should be the priority market.

To develop both the Regional Actives and the German Active Explorer segments will require long term activity and a significant amount of partnership and network building. Developing these markets should be regarded as a five year plus programme (and more likely 10-15 years) of focused activity. There is intense competition among destinations and many DMOs are investing more heavily in promotional channels.

Implementation should include several activities. These include:

- **Further market research.** This report has been based, as far as possible, on primary research and data on the SDNP. However, there are gaps in that information base – in terms of a depth of knowledge on, e.g. what motivates segments to visit what activities they undertake, their spend. The market propositions are conceptual at this stage – they have not been market tested. Further research should include:
- Qualitative research with the Regional Active segment exploring their motivations and needs, and testing the market proposition;
- Market testing the proposition for the German Active Explorers with the travel trade to assess likely interest and potential improvements.

  Other areas of research could include:
- more in-depth visitor analysis -spend, activities, relationships with the surrounding area, accommodation used.
- Analysis into non-visitor groups that are potentially interested in the South Downs to explore in more depth barriers to visiting and initiatives to potentially encourage future visits.
- **Developing a network (or networks) of South Downs tourism businesses**. Developing relationships between the SDNPA and businesses, and between businesses themselves is a fundamental foundation:
  - To securing good content;
  - To developing itineraries and potentially saleable packages;
  - Facilitating self-packaging among businesses and helping them develop their own offers and marketing activity.

  This should be a priority activity for SDNPA.
- **Destination website –** of all potential marketing collateral developing and maintaining a really good South Downs destination website should be the priority. This should be separate to the current SDNPA site. While SDNPA can develop and encourage partner DMOs to publish content on its behalf, e.g. Visit Hampshire and Experience

West Sussex, there is no one site to cover the whole of the South Downs, and administrative boundaries remain a challenge. Businesses located within the park desire a location anchor to underpin their marketing. The website does not need complicated backend functionality, but would need a visitor focus, to be responsive and easy to navigate. Including a blog could encourage locally based writers to 'share the love' providing fresh content and new perspectives designed with the purpose of awareness raising.

- **Third party websites / guidebooks –** Third party providers are typically more influential than a destination's own collateral – TripAdvisor is particularly notable in this regard. While the destination does not own this collateral, it can influence it by providing appropriate content, monitoring and responding to forum discussions.
- **PR** – working with travel writers, bloggers, and local / regional press to generate coverage. This is a 'slow burn' activity that will help to raise awareness.
- **Tactical promotion** – e.g. social media, advertising, and PR. This is particularly effective around specific messages (such as events).
- Work with neighbouring DMOs to:
- Include product from their destination in South Downs' itineraries (particularly in overseas markets);
- Position the South Downs more strongly as part of their destination offer, and develop bespoke itineraries / suggested experiences that can be undertaken easily (e.g. walks, sights that are to get to (by public, private transport from Worthing or Chichester or Eastbourne etc);
- Develop PR coverage (see above).
- **Working with the overseas travel trade** to develop itineraries and saleable product. This may also involve collaborative marketing with tour operators. Realistically this should be undertaken as part of the DEF project and market tested with the trade. will require significant commitment and resource, and time (this should be regarded as a medium to long term commitment).

Given competition from other destinations, and a relative lack of resources the SDNP should focus on one or two areas of activity and seek to deliver these well. These should include network and partnership activity, and a destination website.

While social media is another possibility, to do it properly requires significant resources. Social media channels are no longer a one-way broadcast of messages and the resources required to facilitate the two-way conversation and interaction that characterises successful examples can require a disproportionately large resource.

Appendix 1: Visitor and Segment Characteristics

This appendix provides detailed data on the characteristics of visitors and segments.

The following table provides an overview of the main market groups for the SDNP. These are divided into two broad groups. 'Actives' (coloured in green below) who are visiting for an outdoor activity – typically walking but also cycling and niche sporting activities (e.g. paragliding, riding, fishing). Sightseers and potterers (coloured in blue) are coming different reasons – to visit attractions, see the sites, attend an event, meet friends, have a meal out, go shopping.

Segment	Overview	Characteristics (modal group)	Volume / value (% share)
Local Actives	**From**: the immediate surrounding area (Sussex, Surrey, Hampshire) **Primarily** coming for walking, fresh air and views (over 80%) but also for a bike ride or more niche sport such as fishing, paragliding.	**Day/Staying**: Day **Frequency**: Frequent (at least once every 6 months) **Party**: Adult groups (solo/couples) **Children**: About a fifth of parties contain children	Volume: 46% Value: 24%
Regional Actives	**From**: primarily from the London, Kent, Berkshire area (three-quarters) but a quarter are from counties beyond this area (e.g. Essex, Wiltshire, Bucks, Berks, Oxon). **Primarily** coming for walking, fresh air and views (80%) but also for a bike ride or more niche sport such as fishing, paragliding, and the South Downs Way	**Day/Staying**: Day (55%) and staying (in /outside SDNP) (45%) **Frequency**: Regular / frequent (at least once a year) but also some first-time visitors (about a third). **Party**: Adult groups (solo/couples) – 55+ **Children**: Least likely segment to contain children (about a tenth of parties)	Volume: 8% Value: 10%
UK Actives	**From**: rest of UK (i.e. beyond the South East **Primarily** coming for walking, fresh air and views (80%) but also for a bike ride or more niche sport such as fishing, paragliding, and the South Downs Way.	**Day/Staying**: Staying (in and outside SDNP) **Frequency**: First time but some regular visitors (at least once a year) (about a third) **Party**: Couples – 55+ **Children**: Below average levels of children in visitor group	Volume: 5% Value: 11%
Overseas actives	**From:** Overseas (key ones are Germany, France, Netherlands) Coming walking, fresh air and views and the South Downs Way.	**Day/Staying**: Staying **Frequency**: First time (two thirds) **Party**: Couples. Higher proportion of family and friends group (a VFR factor). Younger age (16-34) **Children**: Below average levels - about a fifth of parties contain children	Volume: 3% Value: 6%

Local Sightseers	**From:** the immediate surrounding area (Sussex, Surrey, Hampshire) Visiting attractions and attending events	**Day/Staying**: Day **Frequency**: Frequent (once every 6 months) **Party**: Families **Children**: Above average 43% (the most child focused segment)	Volume: 11% Value: 12%
Local 'Potterers'	**From**: the immediate surrounding area (Sussex, Surrey, Hampshire) Coming for a range of reasons – e.g. meet friends, visit restaurant / tea room, picnic, shopping, relax	**Day/Staying**: Day **Frequency**: Frequent (once every 6 months) **Party**: Adult groups (alone/couples – 50%) and families **Children**: Average (about a quarter of parties)	Volume: 16% Value: 16%
Regional Trippers	**From**: primarily the London, Kent, Berkshire area (two thirds) but a third are from counties beyond this area. About half are visiting attractions / events. For the rest it is pottering in the Park - meeting friends, visiting a restaurant / tea room, relaxing	**Day/Staying**: Day (55%) and staying (in /outside SDNP) (45%) **Frequency**: Regular / frequent (at least once a year) but also some first-time visitors (about two fifths). **Party**: Couples – most commonly retirement age **Children**: Below average (less than a fifth)	Volume: 5% Value: 8%
UK explorers	**From**: rest of UK (i.e. beyond the South East Primarily sightseeing, but also seeing friends.	**Day/Staying**: Day (55%) and staying (in /outside SDNP) (45%) **Frequency**: Mainly first time (two thirds) but also regular (about once a year – a quarter). **Party**: Couples – most commonly retirement age **Children**: Below average (less than a fifth)	Volume: 4% Value: 8%
Overseas explorers	**From**: Overseas (Germany, Netherlands, Australia)	**Day/Staying**: Staying (typically outside SDNP) **Frequency**: Mainly first time (two thirds) but also regular (about once a year – a quarter). **Party**: Couples, and families **Children**: Average (about a quarter)	Volume: 2% Value: 5%

More detailed data on visitors and segments is provided in the following tables. It is drawn from a combined dataset of data from the 2012, 2014 and 2015 visitor surveys. The analysis is provided for all visitors, staying visitors (a combination of those staying in and around the SDNP), day visitors and eight market segments. The latter is based on cluster analysis of four variables – visitor type (day visitor etc.), frequency of visit, origin and, party type. In some instances, results are highlighted. Where a result is highlighted in green, it shows a value that is significantly higher than average. A value highlighted in red is significantly lower than average.

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	8280	6470	1810	2806	250	452	158	923	293	166	434	1009
Origin												
Local (Sussex Surrey Hants)	73%	89%	17%	100%	-	-	-	100%	-	-	-	100%
Regional (Kent, London, Berks)	9%	7%	16%	-	-	73%	-	-	-	-	66%	-
Region+ (Herts, Dorset, Wilts, Oxon, Bucks, Beds Essex)	4%	2%	12%	-	-	27%	-	-	-	-	34%	-
Rest of UK	8%	1%	34%	-	100%	-	-	-	100%	-	-	-
Overseas	5%	1%	22%	-	-	-	100%	-	-	100%	-	-

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	6491	4940	1337	2806	250	452	158	923	293	166	434	1009
Main influence to visit												
Active (walk ride)	52%	56%	42%	93%	89%	88%	87%	-	-	-	-	-
Sport activity	5%	4%	8%	7%	11%	12%	13%	-	-	-	-	-
Sights (attractions / events)	22%	20%	29%	-	-	-	-	100%	60%	57%	53%	-
'Pottering'	22%	20%	22%	-	-	-	-	-	40%	43%	47%	100%

team

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	8315	6495	1820	2763	246	440	145	897	284	158	419	925
Market Groups												
Local / recreationist	19%	25%	-	28%	2%	7%	1%	4%	1%	1%	3%	18%
Day tripper	59%	75%	-	68%	8%	48%	10%	90%	11%	9%	52%	78%
Overnight staying in SDNP	5%	-	23%	2%	22%	12%	16%	1%	14%	15%	8%	1%
Overnight staying outside SDNP	17%	-	77%	3%	67%	33%	72%	5%	74%	76%	38%	3%

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	6809	5472	1337	2655	198	389	120	893	246	131	390	966
Frequency of visit												
First time visitor	18%	10%	50%	7%	49%	34%	67%	13%	64%	66%	42%	6%
Ad-hoc (less than annual visiting)	4%	3%	8%	1%	10%	3%	4%	1%	2%	5%	2%	2%
Regular (typically every 6 - 12 months)	18%	16%	27%	12%	33%	37%	18%	15%	25%	23%	30%	12%
Frequent (typically at least once every 6 months)	60%	70%	16%	81%	9%	26%	12%	72%	9%	5%	27%	80%

team

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	8300	6487	1813	2799	249	452	157	922	293	165	434	1008
Party type												
Alone	14%	16%	7%	20%	8%	12%	15%	7%	7%	6%	9%	21%
Partner/spouse	37%	34%	47%	39%	49%	46%	40%	33%	49%	36%	47%	29%
Family	28%	30%	23%	23%	23%	17%	18%	44%	23%	36%	25%	27%
Friends	12%	12%	11%	11%	9%	14%	11%	7%	9%	8%	11%	11%
Group / other	2%	2%	4%	2%	2%	4%	5%	2%	4%	4%	2%	2%
Family and friends	7%	7%	7%	5%	9%	6%	12%	8%	8%	11%	6%	10%

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	8315	6495	1820	2806	250	452	158	923	293	166	434	1009
Age groups (% of party)[1]												
Under 16	25%	26%	18%	19%	15%	11%	19%	43%	17%	25%	17%	26%
16-34	22%	23%	21%	21%	16%	19%	34%	21%	12%	25%	20%	20%
35-44	24%	25%	21%	24%	19%	20%	27%	31%	15%	25%	22%	24%
45-54/59	29%	30%	29%	29%	27%	30%	28%	27%	24%	40%	30%	27%
55/60 to 65/69	30%	29%	35%	30%	41%	36%	27%	30%	40%	31%	31%	26%
65/70+	29%	28%	33%	27%	38%	31%	17%	34%	50%	24%	38%	34%
Children in Party												
No children in party	75%	74%	82%	81%	85%	89%	81%	58%	83%	75%	83%	74%
Children in party	25%	27%	18%	19%	15%	11%	19%	43%	17%	25%	17%	26%

1. Age ranges used in the different surveys varied for the older age groups. As such, there is some overlap in the 45+ age groups.

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	5897	4650	1247	2617	232	423	147	879	277	154	406	951
Socio-economic group												
AB	34%	33%	36%	34%	32%	29%	43%	33%	33%	51%	39%	31%
C1	37%	37%	36%	37%	34%	43%	40%	36%	37%	29%	34%	35%
C2	22%	23%	21%	22%	26%	21%	14%	23%	23%	18%	22%	25%
DE	7%	7%	6%	7%	8%	7%	3%	9%	7%	3%	5%	9%

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	6276	4936	1340	2804	249	451	158	923	293	166	433	1005
Ethnicity												
White	99%	99%	98%	99%	98%	95%	91%	99%	99%	98%	98%	99%
Black or Black African	0%	0%	0%	0%	-	1%	1%	0%	-	-	1%	-
Mixed	0%	0%	0%	0%	1%	1%	-	-	0%	-	-	0%
Asian or Asian British	1%	1%	1%	0%	0%	2%	6%	0%	-	1%	1%	1%
Chinese or other	0%	0%	1%	0%	0%	1%	2%	0%	0%	1%	-	-
Health or disability issue												
Yes	8%	7%	10%	8%	7%	10%	6%	10%	8%	4%	8%	11%
No	92%	93%	90%	92%	93%	90%	94%	90%	92%	96%	92%	89%

team

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	6921	5325	1451	2617	220	410	138	879	259	140	386	852
Other activity /influence to visit												
Get fresh air/enjoy great views	61%	62%	56%	63%	48%	47%	46%	60%	54%	51%	44%	49%
Visit a tea room / restaurant / pub	55%	55%	54%	55%	46%	55%	37%	66%	57%	63%	56%	41%
Go for a walk / dog walk /outdoor recreation	42%	42%	42%	27%	22%	27%	19%	50%	43%	36%	44%	39%
Relax and find peace / tranquillity	30%	31%	27%	42%	36%	37%	37%	35%	26%	34%	27%	21%
Observe wildlife / fauna and flora	28%	29%	21%	27%	20%	17%	12%	33%	22%	21%	15%	15%
Get to easily from home	23%	28%	5%	28%	2%	4%	1%	28%	2%	4%	4%	21%
Go to be inspired and generally feel better	23%	24%	17%	32%	23%	24%	12%	31%	25%	16%	18%	15%
Have a picnic	18%	20%	10%	20%	10%	11%	7%	27%	12%	5%	11%	10%
Meet up with friends and family	14%	15%	10%	20%	12%	11%	12%	22%	17%	8%	12%	10%
Find amenities like public loos/ice cream van	12%	12%	11%	15%	13%	20%	17%	17%	11%	3%	11%	10%
Visit an attraction / cultural heritage	11%	11%	12%	10%	13%	12%	7%	8%	7%	6%	10%	10%
Cycle around	7%	8%	3%	9%	2%	2%	1%	8%	4%	-	2%	5%
Go on a special shopping trip	5%	5%	5%	8%	6%	7%	9%	3%	2%	4%	3%	3%
Walk or ride South Downs Way	5%	5%	3%	3%	3%	2%	-	5%	7%	4%	4%	5%
Attend an event	4%	5%	2%	7%	1%	1%	1%	8%	4%	3%	3%	3%
Other	4%	4%	3%	1%	1%	2%	4%	1%	1%	1%	-	2%
Special activity / sport (horse, fishing, paragliding etc)	3%	3%	1%	4%	2%	1%	1%	3%	1%	1%	1%	2%

team

	All visitors	Day	Staying	Local Actives	UK Actives	Regional Actives	Overseas Actives	Local Sightseers	UK Sightseers	Overseas Sightseers	Regional Sightseers	Local Potterers
Sample base	1592		1592	121	224	206	136	50	259	149	198	45
Where staying												
SDNP	22%		22%	41%	25%	28%	17%	18%	17%	15%	19%	27%
Hampshire	14%		14%	13%	13%	13%	9%	16%	21%	22%	21%	13%
West Sussex	20%		20%	12%	10%	11%	9%	36%	27%	12%	31%	18%
East Sussex	33%		33%	31%	42%	44%	46%	20%	27%	26%	20%	22%
Surrey	2%		2%	-	3%	1%	2%	4%	4%	3%	2%	-
London	2%		2%	-	2%	1%	7%	-	1%	9%	1%	2%
Kent	3%		3%	2%	3%	2%	6%	-	2%	4%	2%	-
Other area	4%		4%	3%	2%	1%	4%	6%	2%	10%	6%	18%

Appendix 2: Primary research – visitors and non-visitors

Introduction

Context and Aims

As part of a wider study into customer segmentation and market propositions for the South Downs National Park, a piece of primary research was undertaken looking at both visitors and non-visitors.

The aims of this research were to:

- Identify potential strengths of the South Downs within the visitor marketplace
- Identify potential market segments among current visitors and non-visitors
- Assess barriers to visiting.

Methodology

The research was conducted in September 2017 using an internet panel among UK residents that had taken a short break or day trip in the UK in the last five years. The research targeted certain postcodes in and around south and west London. These represented the primary catchment area for the South Downs National Park but excluded areas right on the edge of the National Park which, it was assumed, would generate frequent recreational trips.

The sample breakdown by postcode is summarised in the following table:

Area and postcode	No. of respondents
Surrey (RH)	75
Kent (TN, CT, ME)	170
Bournemouth / Hampshire / Dorset (BH, SP)	95
London (BR, CR, DA, HA, KT, SE, SM, SW, TW, UB, WC, WD, CR)	671
Berkshire/Reading/Slough (RG, SL)	141
Total	**1152**

The data has been primarily analysed based on visitors and non-visitors. These two groups were further divided. Visitors were split into visitors that had stayed in or around the South Downs National Park, and day visitors. Non-visitors were divided into those would consider visiting, and those that were less likely or interested in visiting (see below).

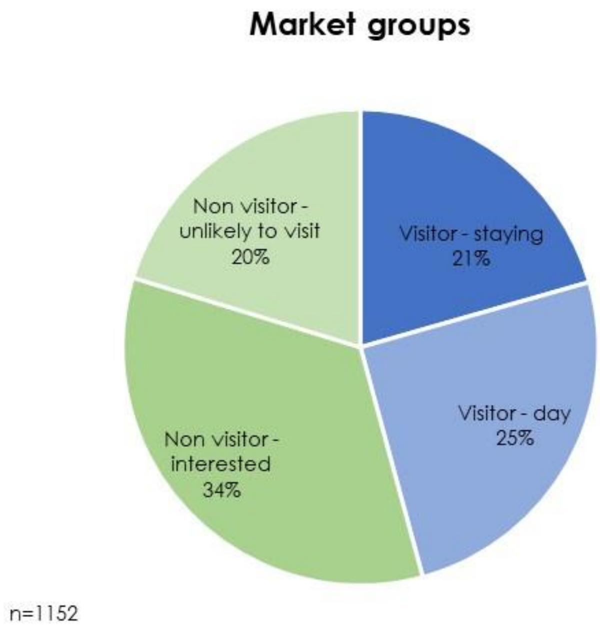
Respondent Characteristics

The following section provides an overview of respondent characteristics.

Market groups

Overall 46% of respondents had visited the South Downs National Park in the last five years. Of these 21% indicated they had taken a staying trip at some point (but may have also taken day trips)- the rest (26%) were day visitors.

Non- visitors accounted for most of the sample (54%). The largest group of non-visitors (34%) were potentially interested in visiting (or not total rejectors). A fifth (20%) were unlikely to visit – either they were not interested or there were practical barriers (like transport).



Trips taken in the last five years

Trips taken in the UK -last years							
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non- visitors - potentially interested	Non- visitors - unlikely to visit
Holidays short breaks	91%	92%	95%	90%	89%	92%	85%
Days out	96%	97%	95%	98%	95%	97%	93%

Visitors to the South Downs National Park were slightly more likely than non-visitors to have taken a UK holiday or short break in the last five years.

Respondent Age

Respondent Age							
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non- visitors - potentially interested	Non- visitors - unlikely to visit
18-24	3%	2%	3%	1%	5%	4%	5%
25-34	18%	13%	18%	9%	21%	20%	24%
35-44	26%	22%	26%	19%	30%	27%	34%
45-54	21%	20%	17%	22%	23%	23%	21%
55-64	18%	23%	20%	26%	13%	15%	11%
65+	14%	20%	16%	23%	9%	11%	6%

Visitors were typically from older age groups – 43% were over 55 years old. Non-visitors were younger (only 22% were over 55+). Non-visitors that were unlikely to visit was the youngest group.

Lifestage

Lifestage							
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non- visitors - potentially interested	Non- visitors - unlikely to visit
At home single (up to 34yrs living with parents)	6%	5%	8%	3%	6%	5%	8%
Young independent single (up to 34 yrs.)	5%	5%	7%	4%	6%	4%	7%
Mature single (over 35 yrs.)	19%	21%	17%	**25%**	17%	18%	14%
Younger couple (up to 49 yrs.)	14%	10%	11%	9%	17%	16%	**18%**
Mature couple (50+ years)	23%	**32%**	27%	**37%**	16%	18%	12%
Single parent family (not living with a partner but with dependent children)	3%	2%	3%	2%	4%	4%	**6%**
Younger family (with partner, with dependent children up to 13 years)	17%	11%	13%	10%	**21%**	**22%**	**20%**
Mature family (with partner, with dependent children older than 13 years)	10%	11%	12%	9%	10%	10%	11%
Mixed….(dependent children some of the time)	3%	2%	3%	2%	3%	3%	4%

Reflecting age (see above) lifestage differs according to visitors and non-visitors. For visitors the commonest lifestages were mature couple (32%), and mature singles (25%) – this was even more marked for day visitors. Families accounted for about a fifth of visitors but younger families were under-represented.

Non-visitors were more likely to younger families and younger couples, and single parents.

Origin

Origin							
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non- visitors - potentially interested	Non- visitors - unlikely to visit
Surrey	7%	**11%**	**8%**	**13%**	3%	2%	5%
Kent	15%	15%	15%	14%	15%	17%	12%
Bournemouth / Hants / Dorset	8%	7%	6%	9%	9%	8%	11%
London	58%	57%	59%	55%	60%	60%	58%
Berkshire / Reading / Slough	12%	11%	13%	9%	13%	13%	14%

Given respondents were drawn from the core catchment area for the South Downs National Park, origin was generally not a differentiating factor between day and staying visitors. The exception was among residents of the Surrey area, who were more likely to be visitors (particularly day visitors).

Household income

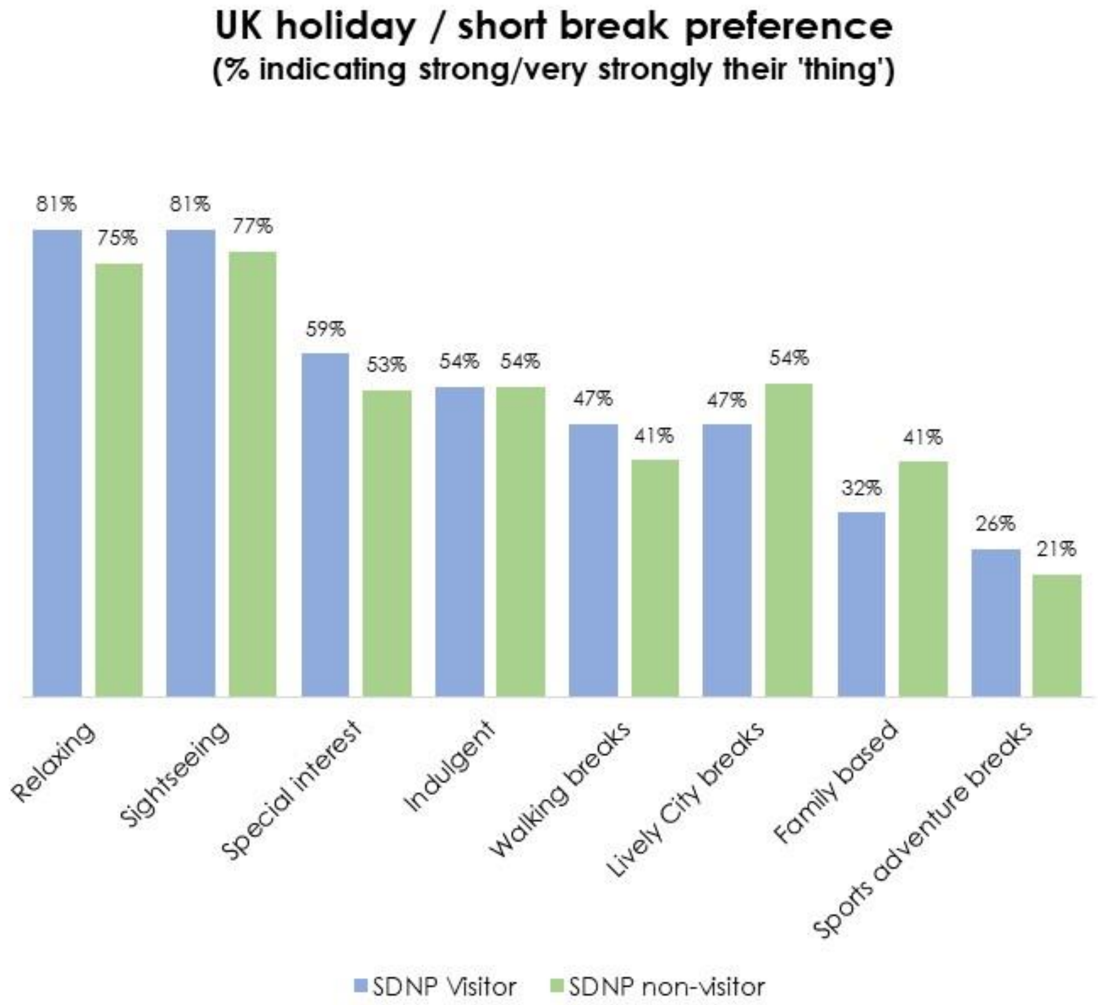
Household Income							
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non- visitors - potentially interested	Non- visitors - unlikely to visit
£100k+	8%	9%	9%	8%	7%	5%	9%
£60-100k	18%	**22%**	**25%**	**19%**	16%	18%	13%
£40-60k	22%	23%	22%	23%	22%	23%	19%
£20-40k	26%	25%	26%	24%	27%	27%	27%
Up to £20k	14%	11%	11%	12%	16%	15%	17%
Prefer not to say	12%	11%	7%	15%	13%	12%	16%

Household incomes varied. For visitors (and non-visitors) the commonest was £20-40k.

Visitors were more likely (than non-visitors) to have a household income of £60-100k.

Holiday / Short Break Preferences

Respondents were asked to what extent they preferred certain types of UK holiday / short breaks. The following chart shows the proportions of SDNP visitors that indicated a strong preference (a score 4 or 5, where 5 was 'definitely me').



Preferences, for both groups, were for **relaxing** breaks (e.g. countryside, heritage & gardens, peace & quiet, gentle walks) and **sightseeing** breaks. **Special** interest (i.e. pursuing a hobby / interest) and **indulgent** breaks were also cited by most respondents.

For most respondents there was a degree of overlap in their preferences – i.e. they liked multiple break types (possibly at different types, possibly a combination of elements in any one holiday/ short break).

There was also a degree of commonality between the preferences SDNP visitors and non-visitors. There were some variations. In general, staying visitors were more likely to like relaxing, special interest, walking and sports adventure breaks. They were less likely to like lively city breaks and family based breaks (a life stage issue).

The following table summarises preferences by all visitor and non-visitor groups. The table shows the average score out of five (where a score of 1 is 'definitely not me', and a score of 5 is 'definitely me').

Holiday Preferences							
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non-visitors - potentially interested	Non- visitors - unlikely to visit
Sightseeing - visiting historic and cultural attractions and sites	4.1	4.1	4.1	4.1	4.0	4.1	3.8
Relaxing – countryside, heritage & gardens, peace & quiet, gentle walks	4.0	4.1	4.2	4.0	3.9	4.0	3.8
Special interest – pursuing my hobby / interest	3.5	3.6	3.7	3.5	3.4	3.5	3.4
Indulgent – pampering in 4-star hotels, spa hotels, health clubs, top quality restaurants quality shopping etc.	3.4	3.4	3.5	3.3	3.4	3.5	3.4
Lively city breaks - shopping and nightlife	3.4	3.3	3.4	3.2	3.4	3.5	3.4
Walking breaks	3.2	3.3	**3.5**	3.0	3.1	3.2	2.9
Family-based – children's activities	2.7	2.5	2.7	2.3	2.8	2.7	2.9
Sport adventure breaks e.g. cycling, water sports, paragliding, climbing	2.4	2.4	**2.7**	2.2	2.4	2.3	2.4

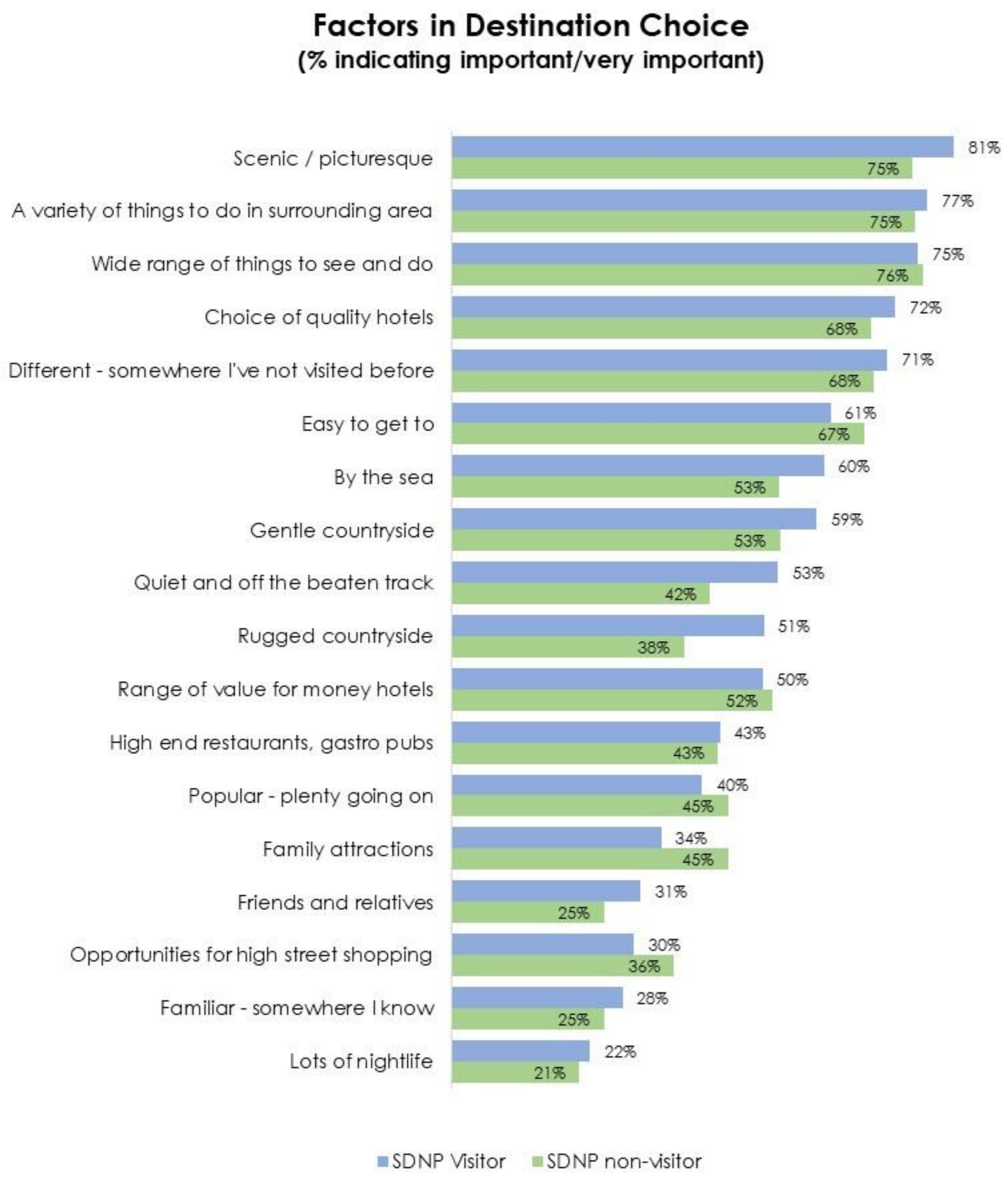
There are some differences between visitor groups. Staying visitors were more likely to prefer walking breaks, and sports adventure breaks than day visitors. They were also more likely to prefer family based breaks than day visitors.

Non-visitors that were potentially interested in the South Downs shared many preferences with visitor groups but were more interested in city breaks and family based breaks.

Non-visitors that were unlikely to visit were less interested in sightseeing, relaxing and breaks but more interested in family breaks.

Factors in destination choice

Visitors were asked to rate the relative importance to them of a range of factors in destination choice. The following chart shows the proportion of visitors and non-visitors that rated destination factors as important or very important.



As with preferences for holiday types, the factors of destination for visitors and non-visitors were broadly similar. Important factors included a destination being scenic / picturesque, having a variety / range of things to do in the destination / surrounding area, a choice of quality accommodation, a different destination (i.e. somewhere new).

There were some differences between visitors and non-visitors. Factors in destination choice that visitors were more likely to rate as important included scenic / picturesque, by the sea, gentle countryside, rugged countryside, quiet and off the beaten track, and friends and relatives.

Less important factors included family attractions, and opportunities for high street shopping.

The following table summarises preferences by all visitor and non-visitor groups. The table shows the average score out of five (where a score of 1 is not at all important, and a score of 5 is very important).

Factors in Destination Choice

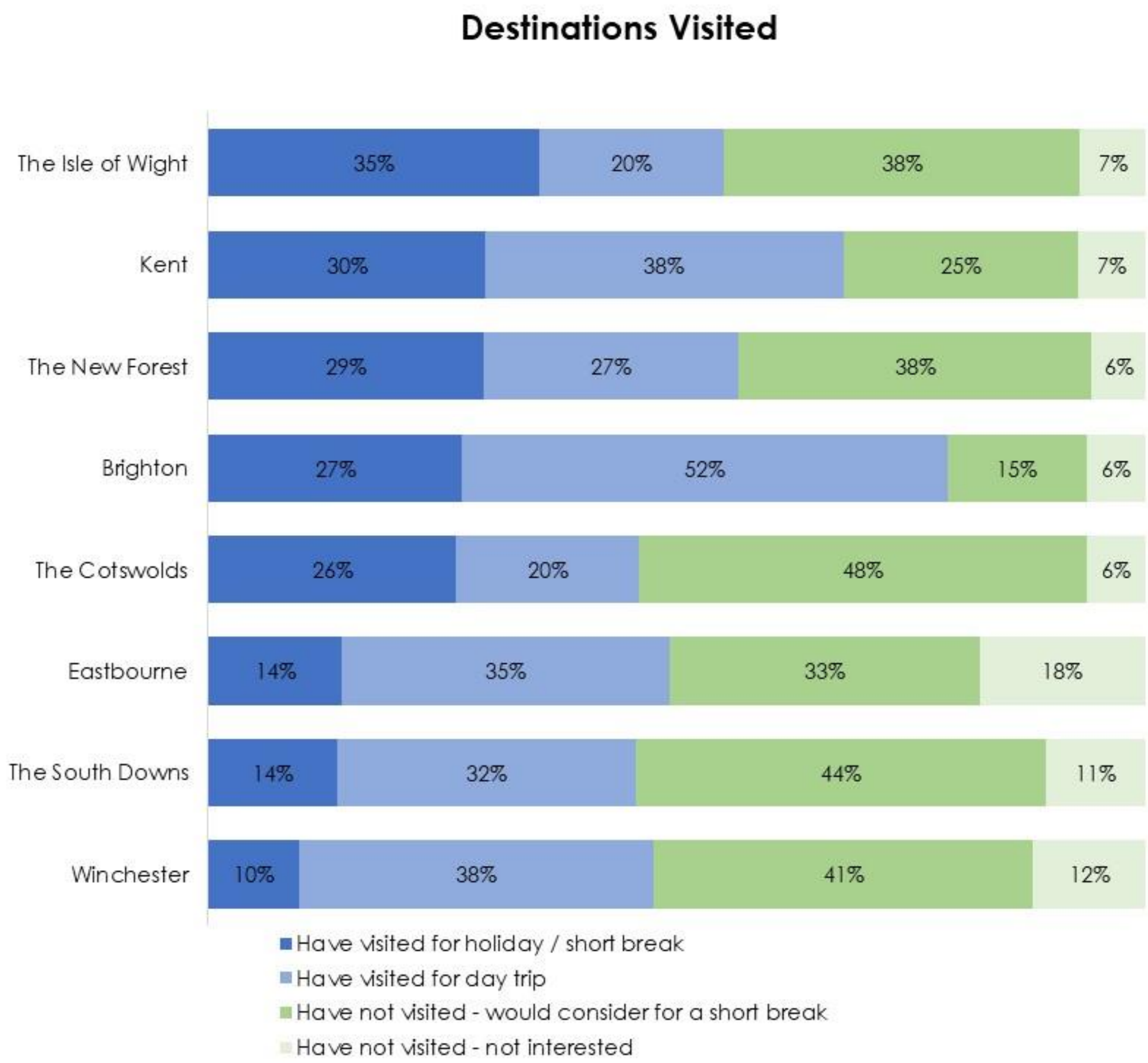
	All respondents	Visitors	Visitors – staying	Visitors - day	Non-visitors	Non-visitors - potentially interested	Non- visitors - unlikely to visit
Scenic / picturesque	4.0	4.1	4.1	4.1	4.0	4.1	3.8
Wide range of things to see and do	4.0	4.0	4.1	4.0	4.0	4.1	4.0
A variety of things to do in surrounding area	4.0	4.0	4.0	4.0	4.0	4.1	3.9
Choice of quality hotels	3.9	3.9	4.0	3.8	3.8	4.0	3.6
Different - somewhere I've not visited before	3.9	3.9	3.9	3.9	3.9	4.0	3.7
Easy to get to	3.8	3.8	3.8	3.7	3.8	3.8	3.9
By the sea	3.6	3.7	3.7	3.7	3.6	3.6	3.6
Gentle countryside	3.6	3.7	**3.9**	3.6	3.6	3.7	3.4
Range of value for money hotels	3.4	3.4	3.4	3.4	3.5	3.5	3.4
Quiet and off the beaten track	3.4	3.5	**3.6**	3.4	3.3	3.4	3.1
Rugged countryside	3.3	3.5	**3.6**	3.4	3.2	3.3	3.0
Popular - plenty going on	3.3	3.3	3.4	3.2	3.4	3.3	3.4
High end restaurants, gastro pubs	3.2	3.2	**3.4**	3.0	3.2	3.2	3.2
Opportunities for high street shopping	2.9	2.8	3.0	**2.7**	3.0	3.0	**3.1**
Family attractions	2.9	2.8	3.0	**2.6**	3.1	3.0	**3.2**
Familiar - somewhere I know	2.9	2.9	**3.1**	2.7	2.8	2.8	3.0
Friends and relatives	2.7	2.8	**3.0**	2.6	2.6	2.6	2.7
Lots of nightlife	2.4	2.4	2.6	**2.2**	2.4	2.4	2.5

There are some differences between visitor groups. Staying visitors were more likely to be looking for gentle countryside, quiet and of the beaten track destinations, rugged countryside, high end restaurants, and a familiar destination (although going somewhere different was still more important).

Respondents that had day visited to SDNP were less likely to be looking for nightlife, high street shops and family attractions.

Alternative Destinations

The following summarises destinations visited by respondents in the last five years.[18]



For general short breaks, key potential competitors were the Isle of Wight, Kent, the New Forest, Brighton and the Cotswolds. For day trips, Brighton, Kent, Winchester and Eastbourne were potential competitors.

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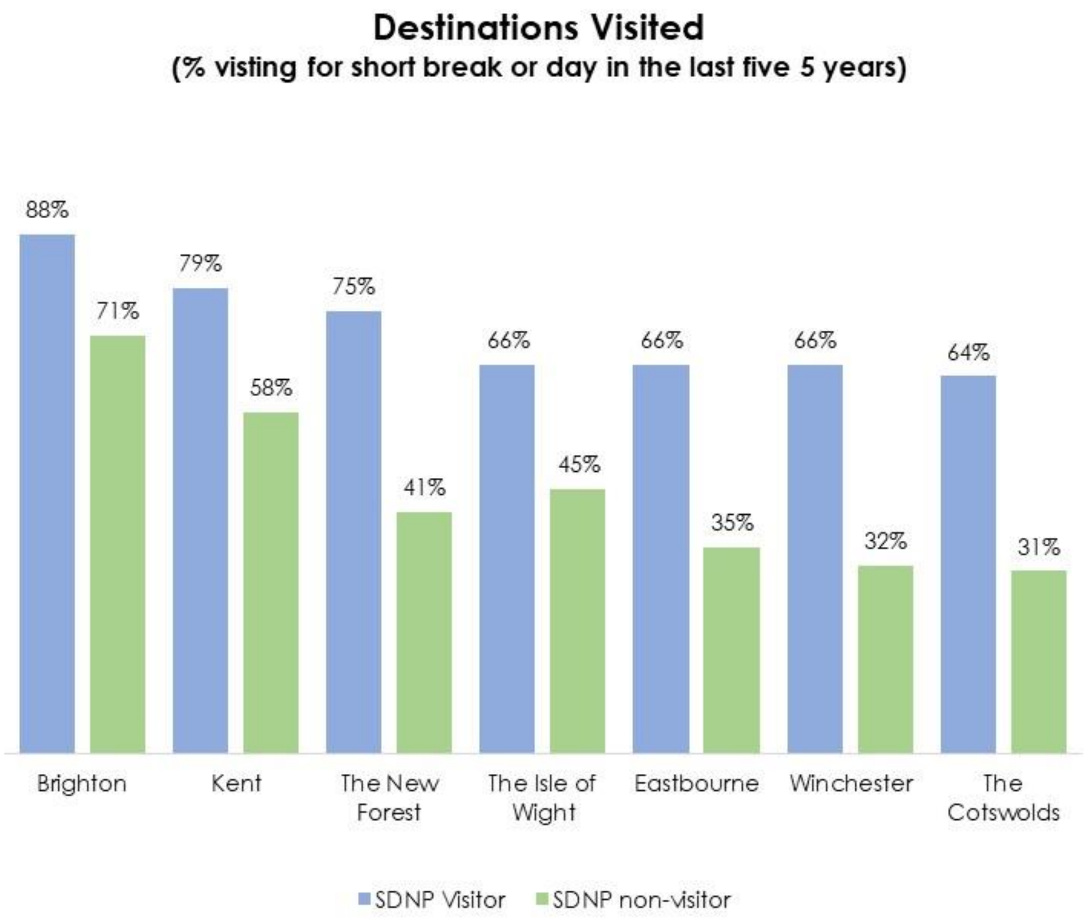
[18] NB the breakdown of visitors and non-visitors to the SDNP (outlined in section 0) is based on a combination of a number of variables. The precise breakdowns are therefore not the same as shown in this chart. They have been left in this format to provide comparison with other destinations.

The following chart summarises destinations visited in the last five years (for either a short break or day visit) by SDNP visitors and non-visitors.



In general, non-SDNP visitors, were less likely to visit other destinations.

For a number of different short break types (e.g. a walking breaks) respondents were asked to choose their two preferred destinations from a list of eight destinations including the South Downs. The following table shows respondents' destination preferences – the percentages are the proportion of respondents citing a destination as one of their two preferred options.

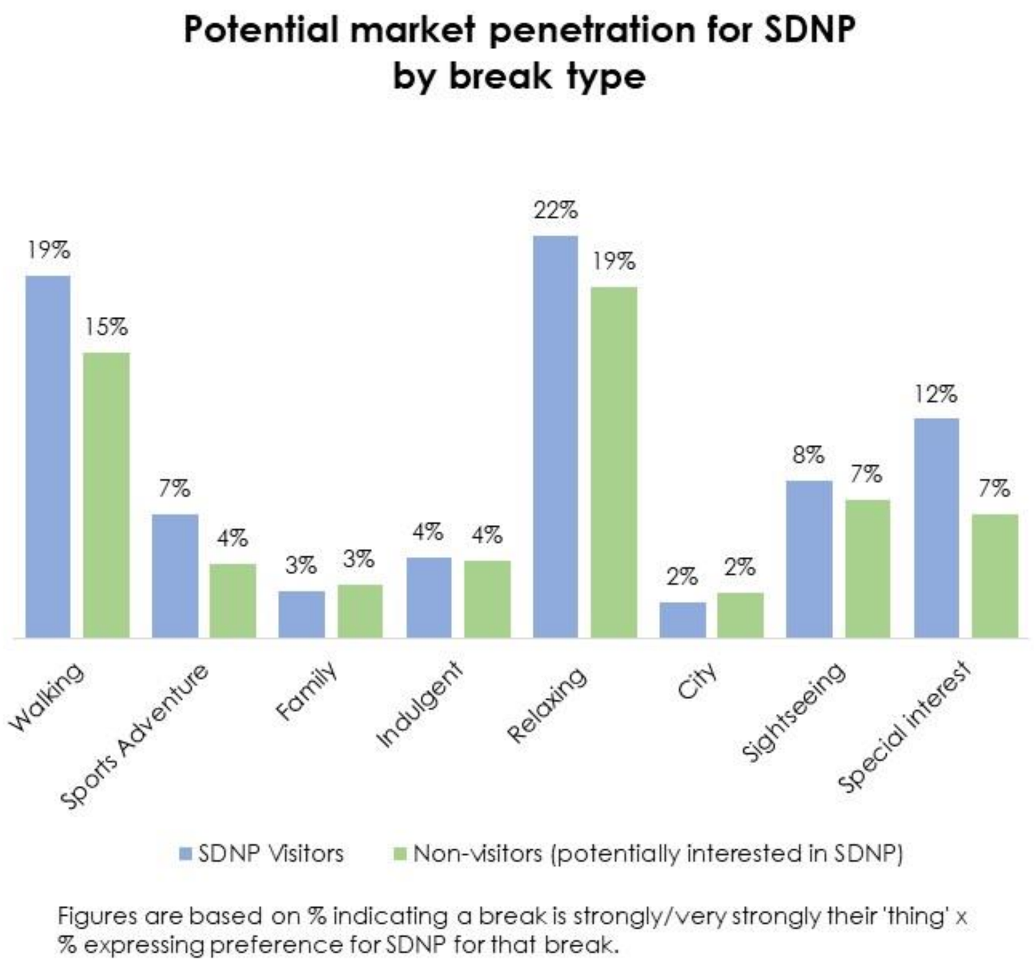
Destination Preferences – by break type								
	Walking	Adventure Sports	Family	Indulgent	Relaxing	City	Sightseeing	Special interest
Kent	11%	16%	24%	19%	19%	21%	31%	23%
New Forest	46%	32%	30%	23%	43%	6%	16%	27%
Cotswolds	41%	16%	14%	32%	45%	8%	24%	24%
Isle of Wight	15%	35%	36%	16%	16%	11%	25%	25%
Winchester	6%	6%	7%	23%	8%	23%	40%	12%
Brighton	7%	22%	31%	32%	7%	69%	17%	25%
South Downs	**37%**	**24%**	8%	8%	**25%**	5%	10%	16%
Eastbourne	4%	10%	14%	11%	5%	17%	6%	9%

The South Downs scores most strongly as a destination for:

- Walking breaks – behind the New Forest and Cotswolds;
- Relaxing breaks – again behind the New Forest and Cotswolds;
- Adventure sports breaks – behind the Isle of Wight and New Forest.

The following chart provides a comparison of relative interest in a break type (from section 0) and interest in the SDNP. This is based on the percentage of visitors and non-visitors (that are potentially interested in the SDNP) multiplies by the percentage expressing a preference for the SDNP for this break type.

Given only a small number of destinations were looked at, the figures in the chart should be looked in comparison to each other rather than taken as a definitive figure on potential penetration.



The break types with the largest potential for the SDNP – in terms of visitor interest in the break and a preference for SDNP as a destination – were **relaxing** breaks, and **walking** breaks, followed by **special interest** breaks (which could cover a variety of interests).

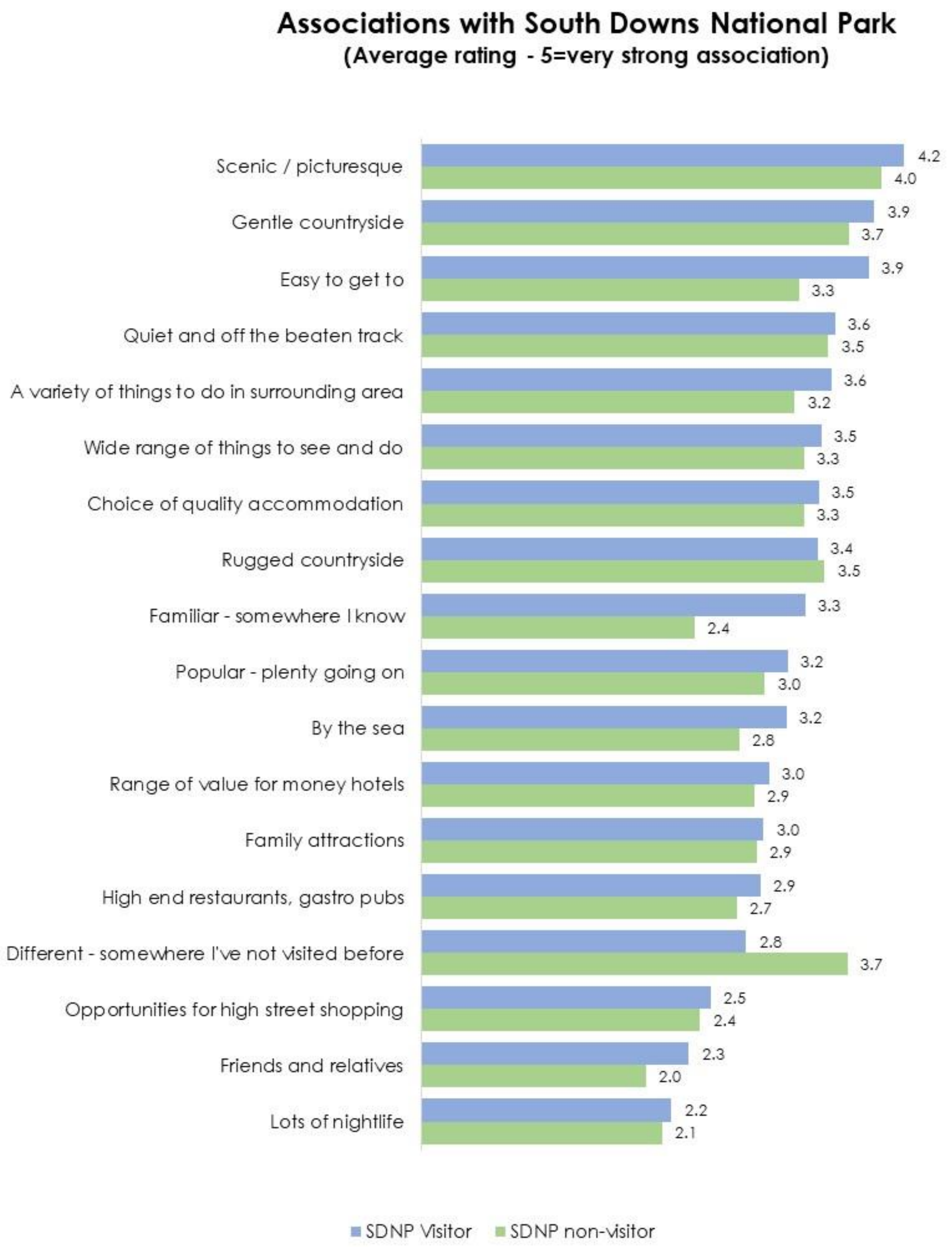
The next largest was **sightseeing** breaks (primarily due to the potential market interest in this break type than the relative interest in the SDNP) and **sports adventure** breaks (primarily due to potential interest in the SDNP).

The pattern was similar for non-visitors that were potentially interested in SDNP.

Associations with South Downs NP

Respondents were asked to what extent they associated various aspects with the South Downs National Park on a scale of one (not at all) to five (very strongly.

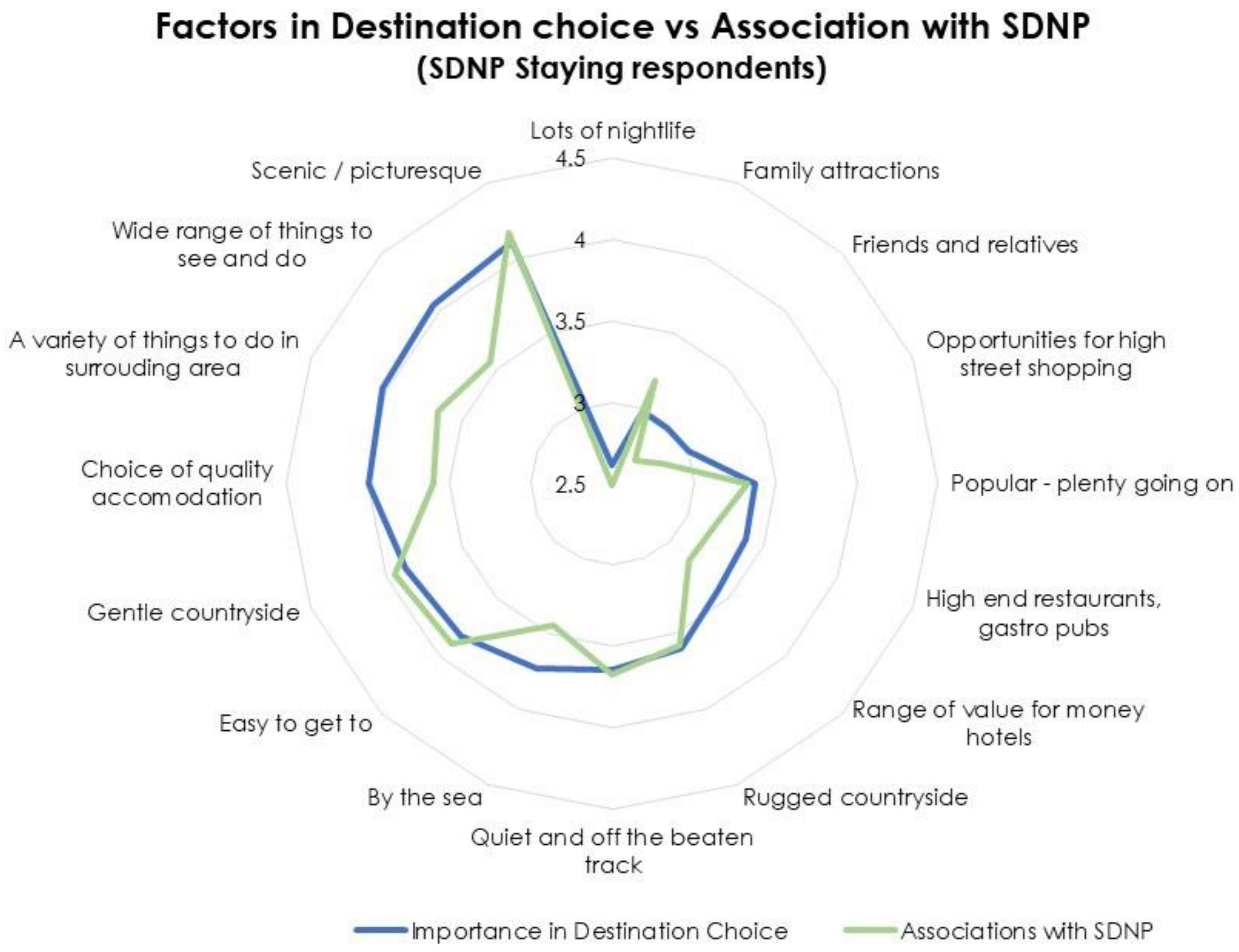
The following chart summarises the average ratings for SDNP visitors and non-visitors.



Strongest associations were scenic/picturesque, gentle countryside, easy to get to (particularly for the visitors group), quiet and off the beaten track.

Associations were broadly the same between visitors and non-visitors but there were some differences around elements like ease of getting to the area, things to do in the surrounding area, by the sea, and, not surprisingly, familiarity and somewhere different.

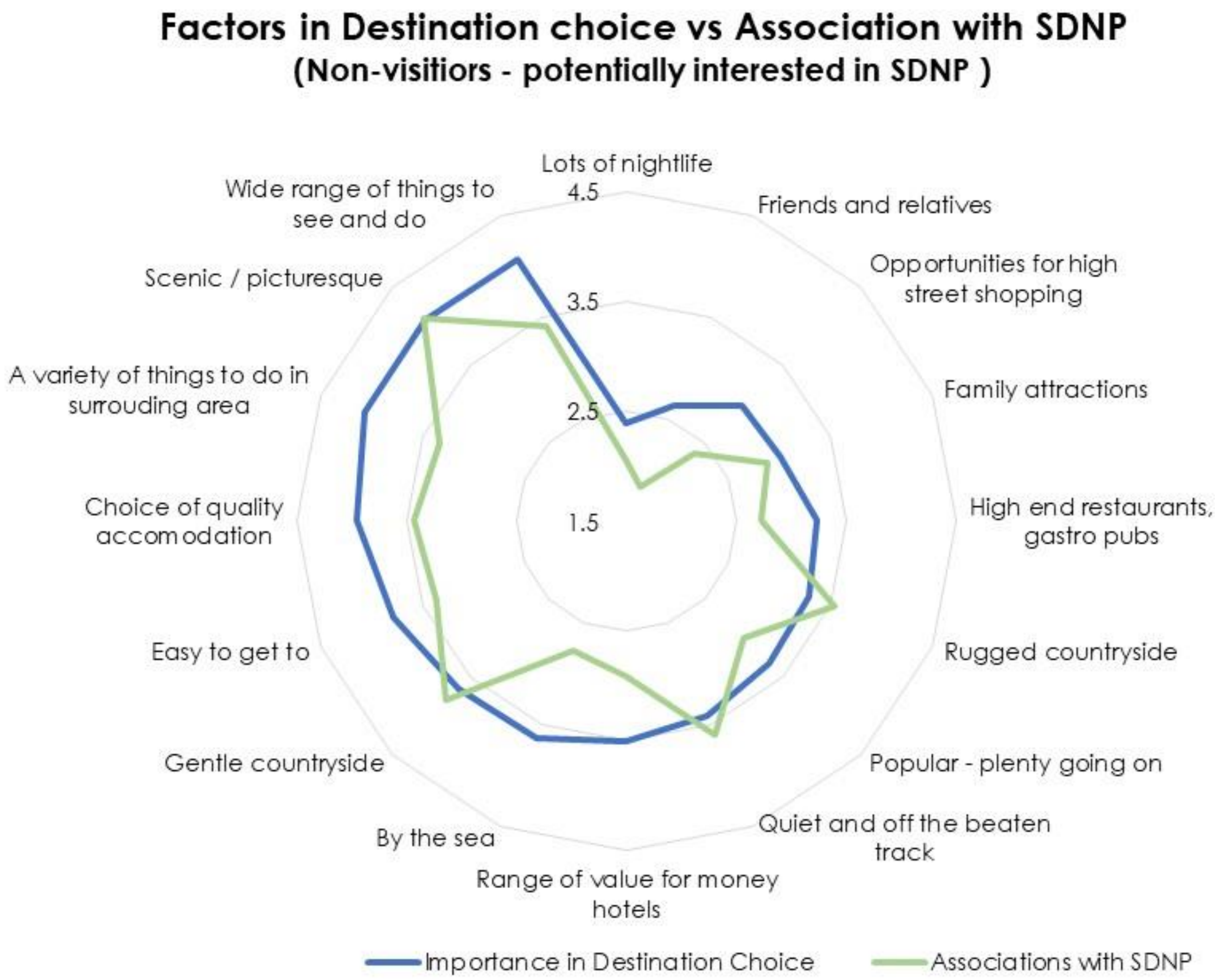
The following chart plots, for visitors that have stayed in SDNP in the last five years, factors in destination choice (for a short break) against their associations with the SDNP.



The chart shows that staying visitors, the SDNP rates well on factors like scenic / picturesque, gentle countryside, easy to get to, and quiet and off the beaten track. These are all important factors for this group.

However, the SDNP does not rate so well against other factors that are also important in destination choice – e.g. choice of quality accommodation, range and variety of things to do in the destination and in the surrounding area, high end restaurants/gastro pubs, and being by the sea.

The following is a similar chart for non-visitors that are potentially interested in visiting the South Downs National Park.



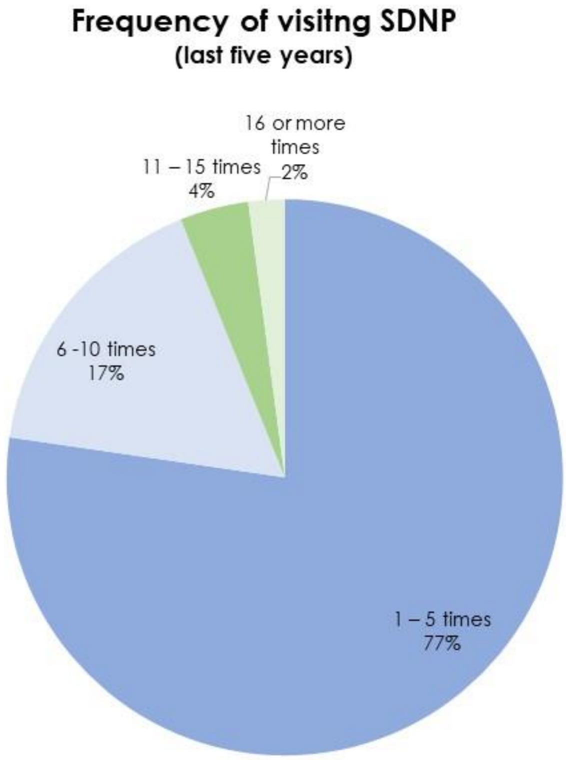
For this group, SDNP also rates well on scenic / picturesque, gentle countryside, and quiet and off the beaten track, which are all important factors.

It rates less well on other important factors such as things to see and do, variety of things in the surrounding area, choice of quality accommodation, range of value hotels, and being by the sea.

Visit Details

Frequency of visit

Respondents that had visited the SDNP in last five years had typically done so one to five times.

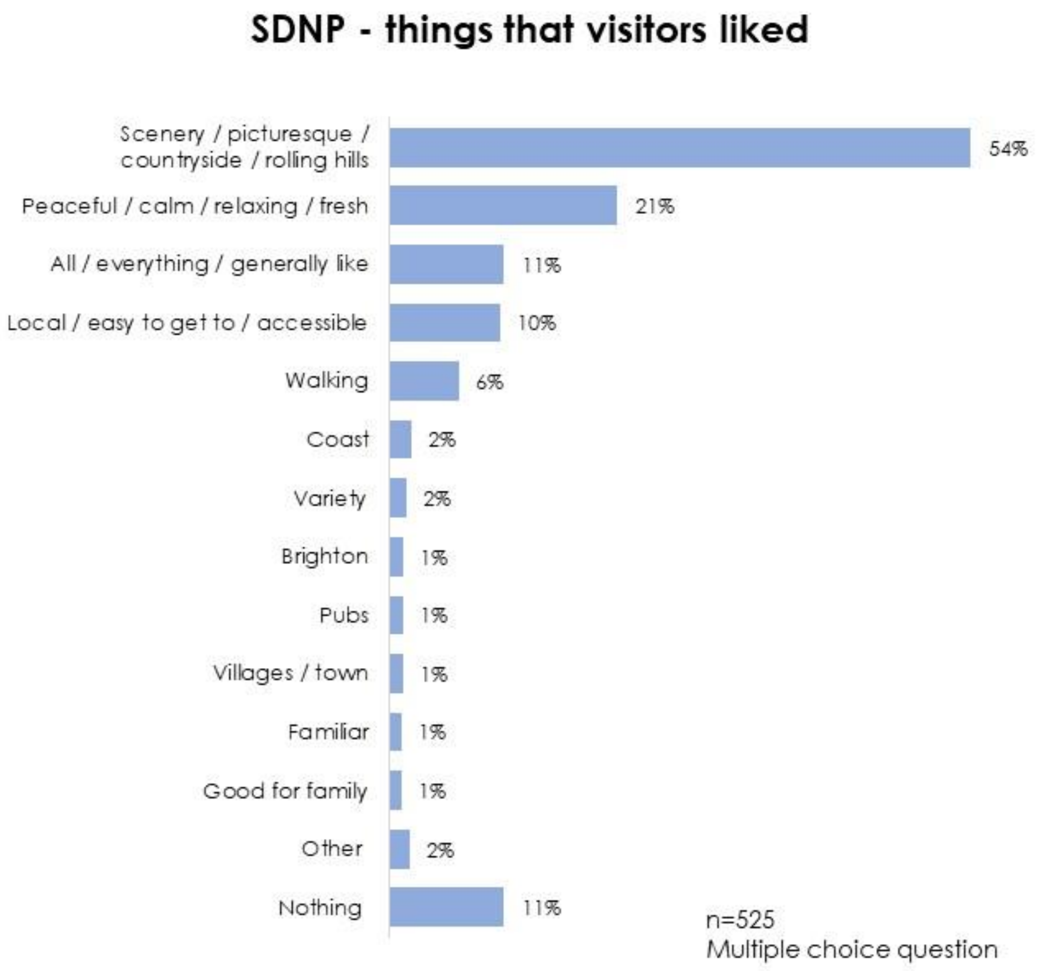


Activities undertaken

Popular activities in the SDNP included going for a meal out, short walk, and visiting a town / village. Among towns/cities around the SDNP, the strongest relationship was with Brighton (visited by 33% of respondents), followed by Eastbourne (21%) and Winchester (18%).

SDNP – things visitors liked

Respondents were asked, in an open-ended question, what they liked about the South Downs National Park. The results are summarised below.

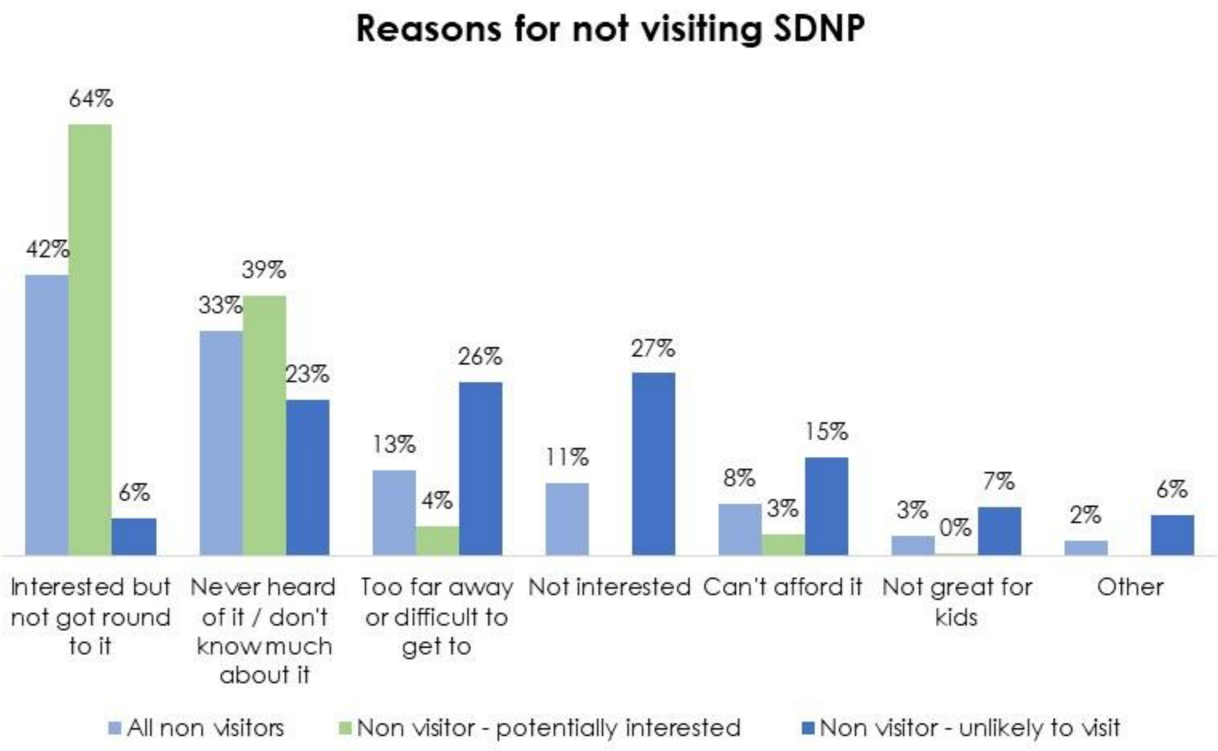


The countryside, scenery, views and rolling hill was the most commonly cited aspects that visitors liked – over half highlighted this. The peace and calm, fresh air and relaxing nature of the place was the other commonly cited elements – over 20%.

Ease of access and location, and the walking were also frequently mentioned. Other elements mentioned included the proximity to the coast and Brighton, the variety of the offer, pubs, villages and towns, and family related elements. Familiarity with the area was also highlighted.

Reasons for not visiting

Non-visitors were asked why (from a prompted list) they had not visited the South Downs National Park. The reasons are summarised in the following chart.



The two commonest factors for all non-visitors were 'interested but not got round it' and 'don't know much about it'.

These were particularly factors for non-visitors that were potentially interested – two thirds cited they had not to round to visiting suggesting a latent demand.

For non-visitors that were unlikely to visit a lack of interest was the key factor but others included difficulties in getting to the SDNP and awareness.

Conclusions

The differences between visitors and non-visitors is more shades of grey than black and white. There are significant similarities between the two groups – in terms of demographic characteristics, preferences for difference holiday/short break types, and factors in destination choice.

In the catchment area where surveying took place, the South Downs had a strong penetration. Among people that took UK short breaks and day trips, 46% had visited the South Downs in the last five years. The research suggests a potential latent demand, with a third of this group potentially interested in visiting. The rest (a fifth) were unlikely to visit.

Visitors were more likely to be:

- From older age groups.
- Mature couples or mature singles
- From higher household income groups (£60-100k) – albeit the commonest income groups were £20-40k, and £40-60k.

This profile partly reflects the appeal of the South Downs and its fit with a more mature demographic group that has a higher propensity (and disposable income) to take short breaks and trips.

Preferences for different types of holidays and short breaks were similar between visitor and non-visitors, albeit with some differences. There was also a degree of overlap in preferences – i.e. they liked multiple break types. For SDNP visitors, favoured break types included '**relaxing'**, 'sightseeing', 'special interest' and 'indulgent'. They were more likely to be interested in walking and sports adventure breaks than non-visitors but were less interested in city and family based breaks

Among respondents, key potential competitor destinations for short breaks included the Isle of Wight, Kent, the New Forest, Brighton and the Cotswolds. Refining competitor destinations by short break type, the South Downs scored strongly as a preferred destination for **walking** breaks, **relaxing** breaks and **adventure** sports breaks. Its key competitors here were the **New Forest**, the **Cotswolds**, and the Isle of Wight (for adventure sports)

The factors of destination for visitors and non-visitors were also broadly similar. Important factors included a destination being scenic / picturesque, having a variety / range of things to do in the destination / surrounding area, a choice of quality accommodation, a different destination (i.e. somewhere new).

For the South Downs National Park, the strongest associations for both visitors and non-visitors were scenic/picturesque, gentle countryside, easy to get to (particularly for the visitors group), quiet and off the beaten track.

Comparing factors that are important in destination choice and associations with SDNP highlights strengths and gaps. For visitors that have stayed in the last five years, the SDNP rates well on factors like **scenic / picturesque**, **gentle countryside**, **easy to get** to, and **quiet** and off the beaten track. These are all important factors for this group. They are strongly reflected in comments by visitors on what they like about the SDNP.

However, it does not rate so well against other factors that are also important in destination choice – e.g. choice of quality accommodation, range and variety of things to do in the destination and in the surrounding area, high end restaurants/gastro pubs, and being by the sea. Some of these factors were however highlighted by visitors in terms of what they like about the SDNP (e.g. the variety of offer, pubs and proximity to Brighton/the coast). They are possibly hidden strengths.

For non-visitors that were potentially interested in the SDNP, strengths include scenic / picturesque, gentle countryside, and quiet and off the beaten track. However, as with visitors, there is a perceived gap in relation to things to see and do, variety of things in the surrounding area, choice of quality accommodation, range of value hotels, and being by the sea.

For visitors, popular activities in the SDNP included going for a meal out, short walk, and visiting a town / village. Among towns/cities around the SDNP, the strongest relationship was with Brighton.

In terms of reasons not visiting, the two commonest factors were 'interested but not got round it' and 'don't know much about it', suggesting a latent demand.   Some of this might be lifestage driven, so translating latent demand into visits may be a medium to long term process.

Appendix 3: Comparator Destinations

The Chilterns

Comparator interest for South Downs National Park

The Chilterns Area of Outstanding Natural Beauty (AONB) was designated in 1965 and covers 833 kms^2 (326 $miles^2$) across the counties of Oxfordshire, Buckinghamshire, Bedfordshire and Hertfordshire. The area has a resident population of 80,000 and is managed by The Chilterns Conservation Board. Major urban centres surrounding the AONB include Luton, Aylesbury, Hemel Hempstead, Reading and High Wycombe. Around 10 million people live within an hour's drive time.[19]

The Chilterns is served by four railway lines, 20 stations and the Metropolitan Underground line. The walking offer covers 2,000 km of rights of way and more than 200 promoted routes including two National Trails (The Ridgeway and The Thames Path), and the Icknield Way, Chiltern Way and Shakespeare's Way. Cycling is available on several National Cycle Network (NCN) routes, the 173km Chilterns Cycleway, and the Chiltern Heritage Trails from towns into the Chilterns, many using disused railway lines.

From 1989 – 1994, a successful conservation project reintroduced Red Kites, and the birds are now one of the area's most recognisable sights and features.

[19] Chilterns Conservation Board 2017

Tourism position

The 2007 Chilterns Leisure Visitor Survey[20] estimated that tourism contributed £472m per year to the local economy, that there were 898,000 overnight stays in 2007/08.

Despite a geographical location between London and Oxford, historically there has not been a strong tradition of collaborative working by the tourism and hospitality sector, and the destination has suffered with low awareness and lack of wider appeal.

The primary goal is promotion and increased awareness of the Chilterns as a desirable destination to visit, experience and stay, year-round. However, there are virtually no resources to allocate to consumer campaigns or promotions for the wider regional and national tourism organisations.

Encouraging Sense of Place taps into local identity, "because if people don't know about The Chilterns they won't want to come, or fight to protect it".

The focus is quality not quantity – there is no wish to become a popular coach destination.

What they did/do to grow the visitor economy

Grass roots business feedback led to the development of the Chilterns Tourism Network (CTN) in 2010 to support the visitor economy. It is the only the only Chilterns-wide tourism network and incorporates over 200 businesses. The Chilterns Tourism Network is an incorporated, not-for-profit business, has no paid staff and is managed by the board of directors.

An initial application to the Chilterns LEADER fund was supported and guided by the Conversation Board as a key partner. The resulting funds, and financial support from businesses, enabled the development of visitor facing website www.visitchilterns.co.uk. Content draws inspiration from what makes the Chilterns unique and is arranged around six themes; the countryside, historic houses and gardens, food & drink, film locations, market towns and the four seasons.

CTN is responsible for:

- Regular business networking events.
- Tourism information exchange and regular e-newsletters.
- Maintaining and promoting www.VisitChilterns.co.uk.
- Continuing the Chilterns accommodation occupancy surveys.
- Continued promotion of the free online marketing resources for businesses.
- Press, PR and social media programme.

Free marketing resources are available to download http://www.visitchilterns.co.uk/sense-of-place.html

Businesses joining CTN are asked to sign a Members Charter, requiring them to promote the Chilterns through their marketing activities. This supports the priority activity – raising area awareness. Leader funded projects like the Chilterns Walking Festival and Chilterns

[20] TSE Research – TSE reports that multipliers used at the time have significantly decreased in more recent studies.

Festival of Food and Drink also lead on awareness raising, and everyone benefits, not just a select few.
Key learning points • Sense of Place should run through everything. • A fee-paying membership model is more effort than it is worth, and if you only focus on fee-paying businesses you lose the individuality that characterises the area. • The market place has changed e.g. Airbnb is so good at experiential marketing and local people interaction, it has taken the place of initiatives like Our Land, which were originally conceived to fulfil this remit. • Be creative and collaborate with limited marketing budgets. Focus on working with those businesses who are supportive of and 'understand destination development'.

The New Forest

Comparator interest for South Downs National Park

New Forest National Park was designated in March 2005, having previously been recognised as a Site of Special Scientific Interest in 1971, and granted special status as the New Forest Heritage Area in 1985. It covers 566 km^2 (219 $miles^2$) of southwest Hampshire and southeast Wiltshire with a resident population of 38,000. The area is managed by The New Forest National Park Authority. Major urban centres surrounding the National Park include Bournemouth, Southampton, and Salisbury. 15 million people live within a 90minute drive of the Forest.[21]

The New Forest is located 90 minutes from London Waterloo Station by train, and has 8 railway stations, enabling train travel from one town to another. There are 325 kilometres of public rights of way, and long distance promoted routes include The Solent Way, Avon Valley Path and The Castleman Trail. There are also over 100 miles of tracks promoted as family-friendly, where cycling is permitted by the Forestry Commission. Walking/Cycling information is easy to find, easy to understand and presented through an App (register and download). The New Forest National Park Authority cycling vision[22] is "To be the UK's premier family cycling destination, with cycling normalised as the key method of getting between the communities and attractions of the National Park" by 2020.

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[21] TSE Research survey of recreational visits to the New Forest National Park 2005

[22] New Forest National Park cycling vision 2013

Tourism position

New Forest National Park facts and figures (2007) reports the total visitor volume was estimated at 13.5M and leisure spending within the park of £72 million, sustaining 2,451 (30%) of jobs.

Over the last 30 years New Forest District Council has resourced and provided a comprehensive Tourism Service (DMO) and led on all tourism policy and marketing, predominantly through its partnership with New Forest Tourism Association (NFTA). Since April 2017, these services have been delivered by Go New Forest, a newly created Community Interest Company (CIC) formed in partnership with the National Park Authority, Forestry Commission and local council.

What they did/do to grow the visitor economy

The New Forest landscape is owned 'by the people' and is promoted as more accessible than areas dominated by individual land-owning interests. The experience offer is described as "deep and meaningful", with an established support infrastructure in place to deliver it.

VERB

The New Forest was an early pioneer of sustainable tourism – using the VERB (former VICE) model of destination management which "puts the forest first" in all local tourism by championing the needs and demands of Visitors, Environment, Residents and Businesses.

New Forest Marque

Is awarded to produce which has been grown, reared, caught, brewed, produced or processed within the New Forest. The accreditation scheme was set up in 2004 to develop and promote the production, processing and distribution of New Forest produce. Marque scheme management was taken on by the National Park Authority, however the narrow geographic boundaries appear too restrictive and may need to be expanded to make it deliver more effectively. https://newforestmarque.co.uk/

Happy visitors…. A virtuous circle drawing from the VERB model.

- Visitors who are well-informed before they visit, welcomed when they arrive and well cared for during and after their day visit or stay tend to be happier visitors.
- Happier well-informed visitors are liable to understand more, spend more, behave well and enjoy a better overall experience during their stay.
- A better overall experience during their stay means visitors are more likely to respect and connect with the local cultural heritage, environment, residents and businesses, thereby getting more from the destination they are visiting.
- Visitors who get more from the destination they are visiting are consequently more likely to invest in it, both emotionally and financially. The emotional and financial needs of the local cultural heritage, environment, residents and businesses are therefore more likely to be met by happy visitors.
- Happy visitors are also more likely to become loyal returners, be less demanding on the public purse, and will energetically and enthusiastically promote the great

experience they've just enjoyed in the New Forest to their family, friends and social media followers. • So happy visitors have a key role to play in all business promotion by their targeting of likeminded new visitors which automatically increases destination brand awareness and potential consumer conversion.
Key learning points • There are no shortcuts. Building the business networks needed to connect people and place requires leaders to make it happen and steer it forward. • A smaller budget can be a good thing; you can't buy your way out of a problem. • For visitors, access to the land appears more restricted than it was in the past, and the challenge is to help them explore with confidence.

The National Forest

Comparator interest for the South Downs National Park

The National Forest was conceived to regenerate and transform one of the UK's least-wooded areas, the result of intensive mining activity. The first tree was planted in 1991, and forest cover has grown from 6% to 20% over the past 26 years. The area covers 200 miles^2 (518 km^2) of Leicestershire, Derbyshire and Staffordshire; includes Burton upon Trent, Coalville, Swadlincote and Ashby de la Zouch, and has a resident population of around 200,000. It is managed by The National Forest Company (NFC) – an independent public company limited by guarantee and a Non-Departmental Public Body sponsored by the Department for Environment, Food and Rural Affairs (Defra). There are 10 million people living within 90 minutes catchment of the Forest.

Railway stations at Tamworth, Burton upon Trent, Leicester and Loughborough provide gateways to the National Forest. A new 75-mile (121km) walking trail opened in 2014. There are over 200 woodlands with public access, and the website enables walk selection by theme and/or location.

Tourism position

Tourism in the Forest attracts around 7.8million visitors per year, supports 4,700 jobs, and contributes £376m to the local economy. Leisure visits are mainly day visitors (92%), overnights 8%. A full-time tourism development manager leads on sustainable development and growth of the Visitor Economy. The company focus is on developing new tourism opportunities that reinforce the distinctiveness of the Forest as one of the UK's most accessible woodland destinations, inspiring people and businesses to reconnect with nature and create a place to grow together.

Not being a DMO, the company can be selective about who it works with to develop and promote the destination – it chooses to work with businesses that recognise value in the forest, rather than promoting all tourism businesses within a defined geography. All events, plans, and activities are planned to be environmentally and financially sustainable in the long term – with local community engagement to care for their Forest, too.
What they did/do to grow the visitor economy The company takes forward interventions through the mechanism of the National Forest & Beyond Tourism Partnership. Instead of charging tourism businesses for marketing services, the company has trialled a contribution model, where businesses who see an alignment to the Forest ask their customers for a donation or contribution towards the Forest. The lodge company Forest Holidays, which has no accommodation in the forest but is based there, has requested donations from each booking made, generating £20K of income in the first year. The National Forest Company is working with Destination Staffordshire to create a bespoke Forest package of small business support. It also launched a #forestlife toolkit that can provide businesses with flexible resources to support their business. Kay areas of activity include: • Maintaining an overview of the National Forest visit website, updating content and developing potential linked to the Forest Life brand' • Accessing new tourism funding (e.g. ERDF, EAFRD, LEADER), to benefit business growth, marketing and skills training in the Forest area. • Developing strategic partnerships with VisitBritain, Visit England and DCMS to secure National profile for the Forest and its positioning as an emerging destination. Looking ahead, it is likely to seek for a return from future infrastructure improvement.
Key learning points • Create Sense of Place around the major attractions that visitors will come to (though recognise that signage etc is difficult to maintain through capital funding opportunities). • Four LEPs cover the National Forest and it is a challenge to get them to see the area as one geography. • Be proactive at targeting media – while it can take up to a couple of years to come to fruition, the coverage is worth it. • The ability to use tourism as part of the area's transformation story.

The Cotswolds

Comparator interest for the South Downs National Park
The Cotswolds is the largest of 38 Areas of Outstanding Natural Beauty in England and Wales, was originally designated in 1966, and then expanded in 1991. Geographically located between Stratford-upon-Avon and Bath, the AONB covers parts of six counties, (mainly Gloucestershire and Oxfordshire, plus parts of Wiltshire, Worcestershire, Somerset and Warwickshire) and 15 local authority political boundaries. The AONB is manged by the Cotswolds Conservation Board, extends over 790 square miles, and has a resident population of just over 139,000[23]. Two million people live within a 20-minute car journey. The Cotswolds AONB is 90 minutes from London and served by 11 mainline railway stations at Bath, Cam and Dursley, Cheltenham, Gloucester, Kemble (serving Cirencester), Moreton-in-Marsh, Stroud, Charlbury, Kingham and Oxford. Over 20 long distance routes and 4,828km (3,000 miles) of public footpaths criss-cross the AONB, including the Cotswolds Way National Trail, and promoted routes such as Diamond Way, Heart of England Way, and the Limestone Link. The cycling offer includes a high density of good byways and bridleways.
Tourism position
Volume and value estimates for 2016 show tourism is worth £1 billion a year, supports 20,000 jobs and welcomes 38million day visits to the area. The 'Assessment of the Economic Value

[23] Population statistic supplied by the South West Protected Landscapes Forum, 2006

of the Cotswolds AONB' in 2013, estimates the presence of 1,070 tourism businesses, (11.3% of total businesses), which employ 6,720 people (12.3% of total employment).

The popular visitor and media perception of the Cotswolds is characterised by attractive small towns and villages built of distinctive local yellow limestone, however this idyllic image of 'Quintessential England' means visitors see only the pretty villages, and miss the landscapes. This, and lack of a unified destination brand identity speaking as one voice, presents a challenge for the Conservation Board. Tourism development falls within the remit of the Communications Officer. There are no target market segments.

What they did/do to grow the visitor economy

- Cotswolds Destination Management Plan

https://www.cotswolds.com/dbimgs/Destination%20Management%20Plan%20for%20Tourism%20Across%20the%20Cotswolds%20April%202014(1).pdf

- Integrated transport ticket

the Cotswolds Discoverer Pass – is a one-day or a three-day ticket offering unlimited travel around the area. Promotion include a couple of suggested ideas for a one-day visit. http://www.cotswoldsaonb.org.uk/wp-content/uploads/2017/11/Cotswolds-Discoverer-an-integrated-bus-and-rail-ticketing-scheme-for-the-Cotswolds.pdf

- Visitor giving scheme

Caring for the Cotswolds – was relaunched in 2013. Local accommodation and attractions ask their visitors to pay a donation towards a pot of funding for conservation projects. Every time a customer books a ticket or a stay they have the option of adding a small donation of £1–10 to the cost. At the end of each year, customers donations are sent to the Cotswolds Conservation Board to be distributed among various landscape and environmental projects around the AONB. In four years the scheme has raised £20,000 – and provides a stream of good news media stories.

Key learning points

- Persuading DMOs to work collectively and not just do their own thing is a big challenge for a landscape focused organisation.
- Separate websites to cover AONB matters, and visitor information, means communication of conservation board messages lose visibility. A redeveloped website which covers both is a better use of resources, but it requires a strong visitor focus.
- The visitor giving scheme – Caring for the Cotswolds helps strengthen business and community relationships and provides good PR stories.
- Facebook is the main social media focus.
- Videos uploaded to the Conservation Board YouTube channel are effective in helping to promote key messages and events, and generate 20k views per video.

Lonely Planet Descriptions

The New Forest

With typical, accidental, English irony the New Forest is anything but new – it was first proclaimed a royal hunting preserve in 1079. It's also not much of a forest, being mostly heathland ('forest' is from the Old French for 'hunting ground'). Designated a national park in 2005, the forest's combined charms make it a joy to explore. Wild ponies mooch around pretty scrubland, deer flicker in the distance and rare birds flit among the foliage. Genteel villages dot the landscape, connected by a web of walking and cycling trails.

The Cotswolds

Rolling gracefully across six counties, the Cotswolds are a delightful tangle of gloriously golden villages, thatch-roofed cottages, evocative churches, rickety alms houses and ancient mansions of honey-coloured stone. If you've ever lusted after exposed beams, cream teas or cuisine crammed full of local produce, look no further.

The South Downs

The South Downs National Park, more than 600 sq miles of rolling chalk downs, stretches west from Eastbourne for about 100 miles. The South Downs Way extends its entire length.

The Chilterns doesn't feature - Buckinghamshire, Bedfordshire & Hertfordshire does

Now on the edge of London's commuter belt, these three green-clad counties once served as rural boltholes for the city's rich and titled, especially when the stench and grime of the industrial age was at its peak. The sweeping valleys and forested hills are still scattered with majestic stately homes and splendid gardens, many of which are open to the public.

The National Forest – doesn't feature.

A-list media articles

'The myths and legends surrounding the South Downs are amazing'– 2017

https://www.theguardian.com/travel/2017/sep/08/south-downs-west-sussex-author-cressida-cowell-how-to-train-your-dragon

36 Hours in the South Downs - 2015

http://www.telegraph.co.uk/travel/destinations/europe/united-kingdom/england/east-sussex/south-downs/articles/36-hours-in-the-southdowns/

The South Downs Pub Walks – 2014

http://www.telegraph.co.uk/travel/destinations/europe/united-kingdom/england/east-sussex/south-downs/articles/The-South-Downs-pub-walks/

Ten ways to enjoy the South Downs – 2009

https://www.theguardian.com/travel/2009/apr/01/south-downs-uk-walking-holidays