



Tourism in the High Weald Area of Outstanding Natural Beauty



For: High Weald AONB Joint Advisory Committee
From: Acorn Tourism Consulting Ltd
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1. INTRODUCTION

1.1 Managing Rural Tourism

Tourism is the fifth largest industry in the UK and supports 2.2 million jobs in England, contributing nearly £97 billion to the economy¹. In 2009-10, 2.86 billion visits were made to the natural environment in England, with visitors spending just over £20 billion.² This income helps to support coastal resorts and rural communities but it can also place a strain on the natural environment and these pressures need to be recognised and managed. The Government's Tourism Strategy recognises these issues and VisitEngland has set out Action Plans to support its Strategic Framework for Tourism 2010-20 that help tourism develop in a way that is flexible and responsive to the environment and respects the needs of people who live and work locally.

1.2 The Vision for Rural Tourism

The national Vision for Rural Tourism, as set out in Visit England's Rural Tourism Action Plan³, is:

“To maximise the potential of the rural tourism offer, which will bring substantial benefits to local economies and communities and contribute to 5% growth, year on year, in the England tourism market by 2020.”

The objectives of the Plan are:

1. To diversify and modernise rural tourist products to generate business opportunities suited to local environments and communities and to develop a year round visitor offer.

2. To increase consumer awareness, understanding and enjoyment of the products and experiences available in rural areas.

3. To encourage rural communities and economies to benefit from the value of rural tourism by taking ownership for the development, management, protection and conservation of rural assets and locations.

1.3 What is Rural Tourism?

The rural tourism offer, as defined by the Action Plan, is distinctive and diverse, and includes a wide range of activities. Those most relevant to the High Weald AONB include walking, sightseeing and visiting historic sites and villages, cycling, mountain biking, adventure sports, camping and caravanning, horse riding, fishing, boating, nature, bird watching, painting, arts and crafts, music and dance, well-being, visiting museums, farm shops, enjoying food, drink and accommodation in rural locations, business meetings and team building.

The rural assets and locations where these activities take place include the High Weald AONB's designated landscape with its rural market towns and villages; built heritage, historic houses, gardens, farms; its natural environments, woodlands and forests, wildlife habitats, reservoirs, lakes and rivers; visitor accommodation; rural transport and infrastructure including rights of way.

1.4 Why Support Rural Tourism in the High Weald AONB?

The greatest value from tourism is from overnight stays rather than day visits. Although holiday trips to the countryside are increasing,

in 2009 less than a fifth of all overnight domestic trips in England were made to the countryside.⁴

The Rural Tourism Action Plan has identified that tourism in rural areas:

- Creates employment and opportunities for business growth, where other options may be limited, and supports existing jobs, micro businesses and people who are self-employed.
- Supplements income for existing businesses for example through farm diversification, thus helping to maintain the environmental and landscape qualities that are valued by visitors, communities and businesses.
- Supports the economic viability of communities with local services and amenities such as shops, pubs, restaurants, transport, supported and sustained by visitors.
- Contributes to the conservation and enhancement of the natural and built environment through the businesses and visitors that benefit and rely on these rural assets.

1.5 Value of Tourism In High Weald

In protected landscapes generally, employment in tourism (accommodation, food and beverage, transport, culture and leisure) is double the national average at around 20%.

In 2011 the High Weald AONB tourism businesses accounted for 11.5% of all businesses and supported 5,740 jobs. Although this was the greatest number of tourism jobs of all AONBs except the Cotswolds, it represents 13% of employment in the High Weald, lower than average for protected landscapes.⁵

1.6 Structure of Tourism In the High Weald AONB

The management of tourism in the High Weald AONB is very fragmented. The 4 County Councils and 11 District and Borough Councils each have responsibility for their own visitor economy which in some areas is considered to be part of culture and leisure and in others is directed by economic development strategy.

In addition there are numerous community organisations and tourism marketing agencies who promote areas that include sections of the High Weald AONB.

The Explore pages of the High Weald AONB Unit's website www.highweald.org provide extensive information for visitors and local residents on what there is to do in the High Weald and places to stay but it is not proactively promoted as a visitor website.

The only initiative that promotes tourism businesses specifically in the High Weald AONB is Our Land 'Tourism in our Finest Landscapes' www.our-land.co.uk a partnership between the protected landscapes of the south east of England and a private sector partner, ResponsibleTravel.com.

1.7 The High Weald AONB Management Plan

This report collates the available information on tourism in the High Weald AONB to provide evidence for the High Weald Management Plan.

It should be noted that there is limited data available specifically relating to tourism in the High Weald and that a full audit of the tourism product in the AONB has not been undertaken recently.

2. CURRENT AND FUTURE VISITORS

2.1 Introduction

The current profile of visitors to the High Weald AONB is informed by national and regional data about visitors to the countryside. No surveys have been undertaken of visitors specifically to the High Weald AONB. The most recent local visitor surveys were undertaken by Wealden and Rother in 2009 and Visit Kent in 2010.

2.2 Current Visitor Profile

2.2.1 Age, Lifestyle and Group Size

Nationally, the typical visitor taking a countryside break will be British, over 45 years old, from the ABC1 socio economic groups and travelling with a friend or partner. Eighty per cent of these visitors will be on a day visit.⁶

In the south east visitors to the countryside fit this profile and are likely to be day visitors, older adults, in employment, car owners and from the higher occupational grades (ABC1). These visitors are a mix of older people enjoying an active independent lifestyle, wealthy families with adult children and substantial disposable income and some people who have second homes in the area.⁷

The few visitor surveys that have been undertaken since 2009 by local authorities in the High Weald confirm that the local visitor profile is again very similar. In Wealden 90% of visitors are day visitors, and the 10% who stay overnight are predominantly UK residents who are most likely to stay with friends or family.⁸

In Rye and Battle more than 70% of visitors are from the affluent ABC1 social economic groups and nearly half of visitors to Rye are over 55 year olds.⁹

2.2.2 Where Do Visitors Come From?

More than 85% of visitors to the south east are British residents with the highest proportions coming from London and the south east counties.

Overseas visitors to Kent and Sussex come from a diverse range of countries but originate most frequently from the Netherlands, Germany and the USA¹⁰.

There is also thought to be high use of the High Weald countryside by people who live in the area. The only detailed study available shows the number of visits to Ashdown Forest is estimated to be between 1.35 and 2.9 million with 90% of people using the Forest coming from within 13 km/8 miles indicating a very high level of repeat use by local residents.¹¹ Technically these people do not count as a 'day visitor' who should come from at least 80km/50 miles from their place of residence and the places they visit at least once a week¹².

2.2.3 Visiting Friends and Relatives (VFR)

Visitors that stay with their family or with friends rather than in commercial accommodation are an important element of the overnight tourism market. A study of the VFR market in Kent showed that between 2006 and 2009 it accounted for half (51%) of all overnight trips to the County.¹³ The picture is similar nationally.

The VFR market is a valuable market, generating around £200 million each year for Kent, second only to the County's holiday and short break market (£228m per year). Around 15% of visitors who come to visit their family and friends stay in commercial accommodation, often due to lack of space in the hosts house, and the Kent study indicated that as many as 37% of visitors could be encouraged to stay in a hotel or other form of commercial accommodation close to their hosts, particularly if a discount was available. A typical comment by respondents was *"I love staying in hotels – a special offer in a pretty village would tempt me"*.

The attractions around the destination where friends live can also be a motivator for visiting. Around two thirds (67%) of VFR guests in the Kent survey had gone out to eat and drink with their hosts and around a third (39%) has visited an attraction.

The knowledge local residents have of their area largely determines where VFR visitors go, as hosts tend to feel under pressure to give their visitors a good time, tending to take them to places they know.

To increase enjoyment and understanding of the High Weald and to gain additional economic value from the VFR market, local residents could be targeted to raise their awareness of local commercial accommodation businesses, local events and activities and the opportunities to visit less well-known attractions.

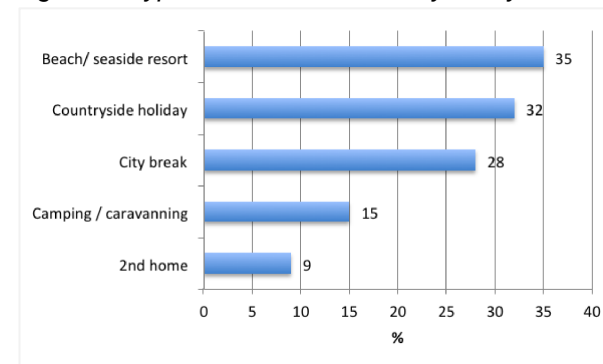
2.3 Current Visitor Trends

2.3.1 National

Nationally, the following trends are evident in the tourism sector:

- Growth of domestic holidays: The 'Staycation' seems set to remain with domestic day visits in England increasing by 12% in 2012 compared to 2011 and the value of visits increasing by 14%¹⁴.
- Short breaks grow in popularity: The short break sector of 1-3 nights has performed well over the past five years and accounts for nearly two thirds (63%) of the UK holiday market.¹⁵
- Coast and countryside holidays were the most popular holidays taken in 2011-12, accounting for two thirds (67%) of the market.¹⁶

Figure 1: Types of Domestic Holidays, July 2012



Source: Domestic Tourism, Mintel 2012

- Quality: there is a demand for good quality and value for money at all price levels.
- The Staycation has led to a rediscovery of the UK's heritage and landscapes, coupled with a preference for self-catering either in cottages or in camping and caravan parks.¹⁷

- Unusual and heritage self-catering accommodation is in demand.
- The Staycation is evolving into the 'Nearcation' with short breaks being taken by people who are most likely to live within two hours drive of their destination.
- An ageing population: people aged 45+ years are taking more domestic holidays, with a growth of active holidays in the 55-64 age group and an increasing number retired visitors aged of 65+ years.
- Activities, particular outdoor activities are growing in popularity: walking, cycling, bird watching, equestrian, golf, spas, well-being.
- Demand for 'experiential tourism': where a holiday is more than somewhere relaxing to stay and 'authentic' experiences based on the local identity of a destination are important.
- Seasonality is spreading slowly: spring and autumn holidays are growing in popularity although Easter, July and August remain the peak holiday periods.¹⁸

2.3.2 Regional

In the south east, for the nine months to October 2012, domestic overnight trips were up by 1.7% compared to the same period in 2011 and expenditure was up by 9%. The south east performed more strongly during this period than other regions of the country.¹⁹

Despite positive visitor figures, tourism businesses in the south east had a challenging year in 2012 primarily due to the poor weather conditions early in the year. Businesses also feel that the economic situation has impacted on them with margins squeezed due to the mounting cost of food, fuel and utilities. Consumer confidence is fragile and visitors are looking for value for money at all price levels.

Some businesses feel unable to make investments and therefore cannot improve their quality.²⁰

2.3.3 Local

Domestic visitors to the High Weald are most likely to come from London and counties in the south east and overseas visitors tend to be from the Netherlands, Germany and France.

There is a strong level of interest in London and the south east counties for overnight stays in the protected landscapes in the south east of England. Visitors are likely to book accommodation in advance but are also interested in local activities such as visiting historic houses and gardens, enjoying nature and wildlife, walking and local food and produce²¹.

In the High Weald there has been growth in the demand for unusual accommodation such as tree houses and shepherd's huts together with 'wild' camping and stays in tipi's and yurts.²²

Anecdotal evidence suggests that good quality accommodation tends to experience the strongest occupancy rates. There is a shortage of high quality self-catering properties for visitors with disabilities, and the one Gold Award Access for All property²³ in the High Weald is in demand.

2.3.4 Future Visitors

In future it can be expected that visitors to the High Weald will primarily be day visitors but that the number of overnight visitors could grow if a high quality, good value tourism product rooted in the uniqueness of the High Weald is effectively promoted.

These visitors are likely to be staying locally, with friends and relatives, or taking a short break from London or other countries in the south east. Overseas visitors from northern Europe will continue to visit and there could be a growth in visitors from the emerging markets, particularly the BRIC countries, as VisitBritain is proactively promoting in these countries and awareness of England as a destination has been raised during the 2012 London Olympics.

In Germany, where outdoor activities are important when choosing a holiday, Britain's ranking for 'scenic natural beauty' improved as a result of the Olympic coverage.²⁴

Visitors will increasingly be looking for local experiences, knowledge and activities that are distinctive to the High Weald. Businesses that are passionate about their locality and are proud to be based in the High Weald will inspire their guests and be important ambassadors for the increasing visitors understanding and enjoyment of the AONB.

As the average age of visitors increases the demand for accessible accommodation and activities is also likely to increase.

3. VISITOR UNDERSTANDING AND ENJOYMENT

3.1 Introduction

Visitors come to the High Weald to enjoy a combination of places, landscapes and experiences.

The places they visit include attractions such as the nine National Trust properties, together with countryside attractions and forests; market towns and villages, designated paths and trails.

The High Weald 'experience' that visitors look for is predominantly outdoors, enjoying the tranquillity and wildlife; walking, cycling or horse riding; playing golf, fishing or enjoying watersports and local food and drink.²⁵

This section examines visitor activities in the High Weald; the marketing messages used to promote the AONB and the issues associated with enabling visitors to understand and enjoy the area.

3.2 Visitor Activities in the High Weald

3.2.1 Places to Visit – Attractions

Visit England's Visitor Attractions Monitor indicates that historic properties and gardens are the most popular type of attraction in the High Weald.

In 2011 there were four attractions that recorded more than 200,000 visits and 11 that recorded more than 100,000 visits. Of these, nine are categorised as an Historic Property or Garden.

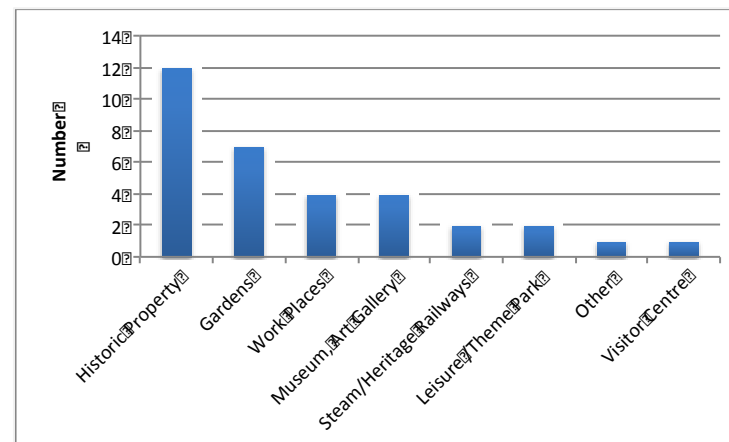
Figure 2: Visitor Attractions Reporting 200,000 or more visits, 2011

Name	No. of visits
Wakehurst Place	414,223
Nymans	294,294
Bedgebury National Pinetum & Forest	236,352
Sheffield Park Garden	219,807

Source: Visitor Attractions Monitor, VisitEngland

More than half (57%) of the attractions in the High Weald are listed as Historic Properties (36%) or Gardens (21%) with the National Trust owning nine of them. A full list of the number of visits to High Weald attractions that participate in the Attractions Monitor is shown in Appendix 1.

Figure 3: Number of Attractions in the High Weald by Category, 2011



Source: Visitor Attractions Monitor 2011, VisitEngland

However the Attractions Monitor does not include some of the High Weald's important countryside attractions. The Ashdown Forest receives between one and two million visitors each year and Bewl Water, which offers a range of outdoor activities, events and Lapland UK, a winter attraction, is thought to attract in excess of 200,000 visits each year.

There are 14 other significant countryside sites in the High Weald that are well used by visitors and local residents including Hastings Country Park, Broadwater Forest (RSPB), Brede High Woods (Woodland Trust) and four other reservoirs including Ardingly and Weir Wood.

3.2.3 Outdoor Pursuits

The experiences that visitors to the High Weald are looking for include historic houses, gardens, food and local produce, wildlife and nature and walking routes²⁶.

Walking is the most popular activity amongst visitors to the countryside and is often cited as the main reason for visiting a destination. The flora, fauna and tranquillity of a place are important to visitors and these qualities can be enjoyed while walking.

In the High Weald there is an extensive network (2,395km) of paths combined with 61 countryside sites, making it an excellent destination for walkers. The long distance High Weald Landscape Trail traverses the AONB and links with the Wealden Way and the 1066 Country Walk.

The Ramblers' Association has a High Weald Walkers Group based in Crowborough and there are a considerable number of walking

groups in Kent and Sussex²⁷. Rother and Wealden both run health walks in the High Weald to encourage local residents take exercise and explore the local area.

Cycling includes leisure cycling, cycle commuting, long-distance bike touring, off road adventure cycling. In the High Weald provision for cycling includes:

- 2 National Cycle Network routes: NCN18 and NCN 21
- 3 cycle routes along disused railways
- 2 large countryside sites at Bedgebury Forest and Penshurst Off Road Cycling (PORC).

There are also a variety of local routes promoted by local authorities. Fourteen cycle routes are promoted in the Explore section of www.highweald.org.

The cycle tracks and trails at Bedgebury are the reason why more than half (56%) of visitors choose to go to Bedgebury, more than double the number that go there to walk (25%).²⁸

The Forestry Commission reported in 2011 that 85% of the visitors to Bedgebury were on a short day trip from home (less than 3 hours) and only 5% were on an overnight or holiday trip.

However, the one business offering a cycling holiday and bike hire to B&B guests on the High Weald section of www.our-land.co.uk reported that these holidays have not sold well over the past year.

Equestrian opportunities in the High Weald are extensive with the Ashdown Forest and Bedgebury being popular sites for horse-riders, many who are local. There are three equestrian routes, the

Dry Hill Rides in Kent, the Forest Way Country Park in East Sussex and the Worth Way in West Sussex.

The Toll Rides (Off-Road) Trust (TROT) has established a network of paths across private farmland and Forestry Commission land. There are also opportunities for visitors to have riding holidays, for example Bedgebury Park riding school offers self-catering cottages and there are a selection of B&Bs that offer stabling for horses.

Woodland covers over a third of the High Weald AONB and is one of its distinguishing features. Woodlands are important places for visitors to enjoy the wildlife, flora and fauna of the area and to walk, cycle, ride horses or just play amongst the trees. The Independent Panel on Forestry aspires to provide as many people as possible with access to woods near where they live and recommends the measurable increase in the quantity and quality of access to public and privately owned woodlands.²⁹

The appeal of woodland to visitors is reflected in the special interest holidays offered in the High Weald section of www.our-land.co.uk which includes bush craft and woodland craft courses and yurt accommodation in the Ashdown Forest.

Good quality access to woodland can encourage outdoor activities by families. This is highlighted at Bedgebury, which is used most often by visitors aged between 25 and 44 years (65%) and with groups with children (65%).³⁰

The provision of clear, well-maintained paths and bridleways is important to enabling both visitors and local residents to enjoy walking, cycling and riding in the High Weald. Increased provision

of rights of way is one of Defra's objectives to improve access to the countryside.³¹

Other activities visitors enjoy in the High Weald include rock climbing, vineyard tours and visits to nature reserves.

Festivals encourage visitors to visit out of season and there are several organised in the High Weald including the traditional bonfire celebration in November. Rother intends to further develop its events programme as part of its Cultural Strategy.

3.3 Transport

The large majority of visitors travel to the High Weald by car.³² However the AONB is well served by seven rail routes and 15 railway stations, with a further 11 stations on the fringe of the area, several of which are served by good bus connections and link with walking and cycling routes.³³

Although it is unrealistic to expect visitors to leave their cars at home, good promotion of local public transport facilities to local residents and tourism businesses can encourage them to explain to their guests how to explore the locality without using a car. Businesses could also offer to collect their guests from the station and increasing awareness of local walks, cycle routes and activities as well as local transport could help reduce car use during trips.

3.4 Marketing Messages

3.4.1 National Campaigns

Nationally, VisitEngland and the National Trust are using countryside and outdoor activity messages in their marketing activities. There is also a more co-ordinated approach to promoting woodlands and countryside sites by the Forestry Commission, Natural England and other organisations.

Visit England is supporting the promotion of domestic self-catering breaks in the countryside and coastal areas, and encouraging the spread of local knowledge. In February 2013 they launched a partnership with holiday cottage group Cottageline to promote countryside and coastal self-catering short breaks.

The National Trust is using the home page of its website to promote outdoor and countryside activities including seasonal walks, outdoor adventures and ideas for bad weather activities. A search for High Weald brings up 10 sites to visit in or near the High Weald.

The Forestry Commission, Woodland Trust, Wildlife Trusts, the RSPB and the National Trust have launched a VisitWoods website to facilitate and encourage visitor access to their woods.

The Forestry Commission also has a mobile app 'ForestXplorer' which enables people to use their iPhones or iPads to locate their nearest Forestry Commission woodland and find out what they can see and do. It includes trail maps, events and can be used to identify trees from their bark, seeds or leaves.

Natural England has developed a Nature on the Map website so visitors can view interactive maps of local areas showing nature reserves, country parks, habitats and biodiversity.

3.4.2 Regional Promotions

Tourism South East's (TSE) consumer website promotes places to stay and things to do based around attraction themes. It also has Outdoor Activity pages for walking, cycling and golf and Destination pages that are town based. In Sussex, Wealden is the only non-town destination, the focus of this page is the Ashdown Forest. The Tunbridge Wells page points potential visitors to the National Trust properties nearby.

TSE also has a Great Country Pubs website and Rural Ways. The Rural Ways website promotes the countryside but lack of funding means it is no longer actively managed.

Hidden Britain promotes local destinations and includes locations in the High Weald, including Edenbridge, Hawkhurst and Winchelsea.

The promotion of holidays in the south east's protected landscapes is being led www.our-land.co.uk. Our Land aims to put the landscape at the heart of the visitor experience, encouraging visitors to discover and share the conservation stories of the landscape. To be a member of Our Land a business has to show their commitment to sustainable business practises and make a 'promise' about the actions they take to protect the environment, work with local communities and to promote their local landscape. In the High Weald 58 businesses were members of Our Land in January 2013 and since it was launched in October 2011 nearly 1,000 bed nights have been sold.

3.4.3 Local Initiatives

For visitors trying to plan a trip to the High Weald there are more than 30 websites covering the area. A full list of these websites can be found in Appendix 2. The most prominent are VisitKent, VisitSussex and Visit1066Country which are managed by the local Destination Management Organisation (DMO). The need to generate income from the website means that there is a focus on accommodation, attractions and commercial activities.

3.4.4 Sustainability Messages

Visit Kent's website provides visitors with sustainability information on its Going Green pages³⁴ which includes messages about alternatives to using the car, conservation, wildlife, local produce, green accredited accommodation, Green Traveller and Our Land.

3.4.5 High Weald Messages

Overall there are very few messages to potential visitors about the conservation of the High Weald AONB on visitor websites. Where mentioned, it is used to locate the relevant attractions for example:

- Seven Wonders of the Weald highlights the High Weald AONB as the location of the seven attractions it promotes.
- There are three websites promoting the Ashdown Forest two of which clearly locate it within the High Weald.
- East Sussex County Council's Discover East Sussex pages include a page on *A day out and about in the High Weald* which provides information on Wilderness Wood, Ashdown Forest Llama Park and Forest Way Country Park.

Apart from the High Weald AONB Unit's own website there is very little easily accessible information for visitors about the High Weald.

3.5 Visitor Issues - Understanding and Enjoyment

3.5.1 Understanding the High Weald

A visitor's understanding of the place they visit is largely determined by their prior knowledge of a place, research they do before visiting and information and interpretation they receive during their stay.

As identified in the previous section, the level of visitor information provision about the High Weald AONB's status as a protected landscape and its special qualities is very limited. Provision of information during their stay will largely depend on the knowledge of their hosts, either the friends or relatives they stay with, or the owner or staff at the commercial accommodation.

The local culture and heritage of a destination is frequently of considerable interest to visitors and there is an opportunity to extend this knowledge beyond heritage houses and gardens, to the more local stories of the people and communities that have shaped the landscape and made the High Weald unique and distinctive.

3.5.2 Enjoyment

The enjoyment that visitors gain from a trip to the High Weald depends on how their experience meets their expectation.

To enjoy walking, cycling and riding and other outdoor activities requires the quality of rights of way to be well maintained and clean,

free from dog mess and rubbish. High levels of traffic and speeding cars make roads particularly dangerous for cycling and horse riding.

Information provision should be well coordinated by destination managers and provide consistent messages about the High Weald. It should include:

- Local knowledge about the area, its special qualities and how visitors can behave to help to conserve its uniqueness
- Local transport
- Details of walking, cycling and riding routes and facilities and other local activities eg, woodland crafts, local skills courses
- Countryside sites and less well known attractions
- Local businesses including local producers, pubs and restaurants
- Facilities for wheelchair users and other disabilities including accommodation and access to the countryside.

4. VISITOR MONITORING AND EVALUATION

4.1 National Tourism Intelligence

Visit England collects a range of tourism data and makes it available online via their Destination Intelligence System.³⁵ The data collected includes:

- Accommodation Occupancy
- Visits to Attractions
- Domestic Overnight Tourism
- Domestic Tourism Day Visits
- Inbound Tourism
- Tourism Supply
- Visitor Satisfaction

However at Local Authority level the only data collected by Visit England is from the Domestic Overnight Tourism Survey (GBTS) and the Attractions Monitor. Therefore no accommodation occupancy data is collected annually for the High Weald.

Attractions are not obliged to take part in the Attractions Monitor and in the High Weald some key attractions that do not participate including Bewl Water, Hever and Chiddlingstone Castles.

4.2 Economic Value of Tourism to the High Weald

In 2011, Defra produced the only available data that gives a picture of the economic value of tourism in High Weald AONB. In most protected landscapes farming and forestry are the most important economic activities, with tourism is not far behind.

In protected landscapes generally, employment in tourism is double the national average at around 20%. In the High Weald AONB tourism businesses account 11.5% of all businesses and support 5,740 jobs, which represents 13 % of employment.³⁶

4.3 High Weald AONB Tourism Supply

There is no up-to-date audit of the High Weald's tourism products. The best indication of the businesses that comprise the area's visitor economy is provided by the High Weald AONB Unit's database of businesses, which is not considered exhaustive.

Figure 4: Tourism Businesses in the High Weald, March 2013

Type of Business	No.
Accommodation	225
Attractions	138
Local producers	190
Pubs & Restaurants	154
Tea Rooms	85
Countryside sites	61

Source: High Weald AONB database and website

Around a fifth of the High Weald's accommodation providers were members of Our Land in January 2013 and could therefore be categorised as being responsible tourism businesses. However there are only three accommodation businesses with Green Tourism Business Scheme (GTBS) sustainability accreditation³⁷.

4.4 Demand for Tourism in the High Weald AONB

4.4.1 Accommodation Occupancy

There is no data on the occupancy levels in the High Weald. However Visit Kent's research provides some insights into the demand for countryside accommodation in the south east.

The occupancy rate for countryside accommodation tends to be lower than in towns or at the seaside. In 2011, room occupancy for accommodation businesses in Kent's countryside was 48% compared to 67% in large towns and 51% in small towns and at the seaside. However occupancy in the countryside had increased by 3.2 percentage points, more than the increases experienced by large towns (1.7 points) and seaside destinations (1.1 points).³⁸

The trends for self-catering accommodation are:

- Demand strongest for higher quality units.
- Smaller units achieving higher occupancy levels.
- Demand to be highly seasonal, with growing demand for weekend breaks during shoulder season months and even winter.
- Demand to be primarily for holidaying purposes.

The Kent research highlighted the demand for luxury camping, providing ready-erected and fully equipped tents, yurts, tipis and other unusual accommodation.

This trend is reflected in the demand for High Weald camping products on the Our Land website, where the most popular properties were treehouses followed by two other campsites.

4.4.2 Attractions

The number of visits to attractions in the High Weald increased in 2011 compared to 2010, with the exception of Wakehurst Place. The trends in visits to each of the High Weald attractions that take part in the Attractions Monitor are shown in Appendix 3.

In Kent, rural attractions also did well during 2011, increasing visitor numbers by 5% on 2010. This increase was notable better than for coastal attractions (0.4%) and urban attractions (1.9%).

4.5 Joint Advisory Committee and the Tourism Sector

The current growth in countryside accommodation occupancy rates and visitor attraction numbers in the High Weald, together with the increasing demand for local experiences rooted in distinctive local culture and landscape, provides the Joint Advisory Committee with an opportunity to increase visitors' understanding and appreciation of the High Weald's protected landscape, its special qualities and conservation issues by promoting these assets to residents, businesses and visitors.

Supporting the development of a good quality tourism offer based on the protected status of the High Weald could benefit the AONB's local communities, businesses and conservation goals.

5. KEY ACTIONS TO IMPROVE PUBLIC UNDERSTANDING AND ENJOYMENT

5.1 Tourism Partnerships

Diversify tourism products and spread seasonality:

- Support the development of existing and new visitor activities that are less weather dependent and appeal to visitors throughout the year
- Adapt the distribution of funding schemes to encourage development of facilities that are less weather dependent
- Identify best practice on the connection between planning and tourism at local level, and community engagement in the planning process, to improve understanding and realise the growth opportunities³⁹
- Identify underutilised or redundant rural assets and support and facilitate owners to develop their tourism potential
- Work with partners to provide business support and skills development to rural tourism businesses
- Increase knowledge of sustainable business practises that can help businesses cut operational costs
- Support businesses to improve quality.

Increase consumer awareness, understanding and enjoyment

- Develop messages that reflect the distinctive nature of the High Weald tourism products throughout the year
- Include these messages in the promotion of tourism products in the High Weald
- Promote understanding of AONB to local residents who act as 'ambassadors' for a significant proportion of the visitor market.

- Identify and target markets that are most likely to buy rural tourism products
- Distribute messages using new media and viral techniques to engage younger audiences
- Promote lesser known countryside sites and local events
- Support the development of events and activities that explore and celebrate the area's special qualities
- Maintain rights of ways
- Support the use of and promote local produce
- Encourage accommodation businesses to report their occupancy via the England Occupancy Survey and attractions to report their visitor numbers for the Attractions Monitor to help build a more accurate understanding of tourism in the High Weald to inform planning, management and marketing decisions.

Engage Local Communities

- Support community use of local rural tourism assets
- Encourage local communities to create visitor travel plans promote activities that require reduced travel
- Develop local transport 'hubs' for car free travel options eg, walks, cycle hire linked to rail and bus services
- Identify and share best practice in rural public transport that meets the needs of visitors and local communities eg, car clubs, electric bikes
- Provide advice on energy efficiency, lower cost fuels, travel options, reduced food mile.

5.2 Tourism Businesses

Diversify tourism products and spread seasonality:

- Develop and promote wet weather activities to overcome unpredictable weather conditions and likelihood of more extreme weather conditions in future
- Develop traditional and new low impact experiences to meet consumer trends eg, walking, cycling, bird watching glamping, camping huts, local produce, woodland and bushcraft, 'slow tourism'.
- Develop more experiences for families
- Develop more arts and crafts and nature activities, for all age groups.⁴⁰

Increase consumer awareness, understanding and enjoyment

- Include messages reflecting the High Weald 'sense of place' on websites and other marketing activities
- Provide guests with information about local countryside sites and events and activities that do not involve using the car
- Offer to collect guests from local train / bus stations
- Promote local businesses and produce to guests
- Promote offers and activities locally to tap into VFR market
- Develop skills and accreditation to meet market demand eg, Welcome Walkers and Cyclists, Green Tourism Business Scheme
- Report occupancy data to help build a more accurate of tourism in the High Weald to help make more informed marketing decisions.

APPENDIX 1 - Visit England Attractions Monitor, High Weald Attractions, 2011

Name	Local Authority	Category	No of Visits	Entry 2011
Wakehurst Place	Mid Sussex	HP	414,223	11.50
Nymans	Mid Sussex	G	294,294	8.50
Bedgebury National Pinetum & Forest	Tunbridge Wells	G	236,352	8.50
Sheffield Park Garden	Wealden	G	219,807	7.80
Bodiam Castle	Rother	HP	188,319	6.80
Sissinghurst Castle Garden	Tunbridge Wells	G	188,225	10.00
1066 Battle Abbey and Battlefield	Rother	HP	134,158	7.30
Scotney Castle	Tunbridge Wells	G	133,425	12.60
Tulleys Farm	Mid Sussex	LTP	120,000	F
Kent & East Sussex Railway	Ashford	R	102,405	13.50
Batemans	Rother	HP	100,305	8.60
Standen	Mid Sussex	HP	93,243	8.18
Heaven Farm Museum	Wealden	O	90,000	3.50
Penshurst Place and Gardens	Sevenoaks	HP	71,845	9.80
Pooh Corner	Wealden	VC	60,000	F
Blackland Farm Activity Centre	Mid Sussex	LTP	56,000	F
The Chapel Down Winery	Ashford	WP	52,000	9.00
Spa Valley Railway	Tunbridge Wells	R	36,229	9.00
Pashley Manor Gardens	Rother	G	30,265	8.50
Smallhythe Place	Ashford	HP	27,490	6.20
Rye Castle Museum	Rother	HP	22,356	3.00
Carr Taylor Vineyard	Rother	WP	22,024	1.50
Hole Park Gardens	Ashford	G	10,644	6.00
Lamb House	Rother	HP	7,713	4.30
Bayham Old Abbey	Tunbridge Wells	HP	6,068	4.20
Brede Steam Engine Society - The Giants of Brede	Rother	WP	5,000	F

Tenterden and District Museum	Ashford	MAG	4,616	1.50
Cranbrook Union Mill	Tunbridge Wells	R	3,713	F
Cranbrook Museum	Tunbridge Wells	MAG	1,713	2.00
Nutley Mill	Wealden	WP	1,554	F
Ifield Watermill	Crawley	HP	856	F
Sussex Farm Museum & Nature Trails	Wealden	MAG	377	F
Stocks Mill	Ashford	HP	126	1.00

Abbreviation

Category:

G	Gardens
HP	Historic Property
LTP	Leisure/ Theme Park
MAG	Museums / Art Galleries
O	Other
R	Steam/ Heritage Centres
VC	Visitor Centre
WP	Workplaces

APPENDIX 2 - Visitor Websites Covering the High Weald AONB

Kent

www.visitkent.co.uk
www.ashfordtourism.co.uk
www.cranbrook.org
www.tenterdentown.co.uk
www.edenvalleykent.org
www.hiddenbritainse.co.uk/edenbridge.htm
www.visittunbridgewells.com
www.sevenwonders.org.uk
www.visithawkhurst.org.uk
www.hiddenbritainse.co.uk/hawkhurst.htm

Sussex

www.lovesussex.com/countryside/
www.eastsussex.gov.uk/leisureandtourism/countryside/default.htm
www.visitsussex.org
www.visit1066country.com
www.winchelsea.net

www.hiddenbritainse.co.uk/winchelsea.htm
www.visitryebay.com
http://ryeguide.co.uk/places_to_visit.htm
www.visitryeharbour.co.uk
www.ryeheritage.co.uk
www.ashdownforest.com
www.ashdownforest.org
www.ashdownforest.co.uk
www.heathfield.net
www.visitsussex.co.uk
www.lovesussex.com/countryside/
www.visithorsham.co.uk
www.midsussex.gov.uk
<http://thisishaywardsheath.com/home.htm>

Surrey

www.visitsurrey.com

APPENDIX 3 – High Weald Attraction Visitor Trends, Visit England Attractions Monitor 2011

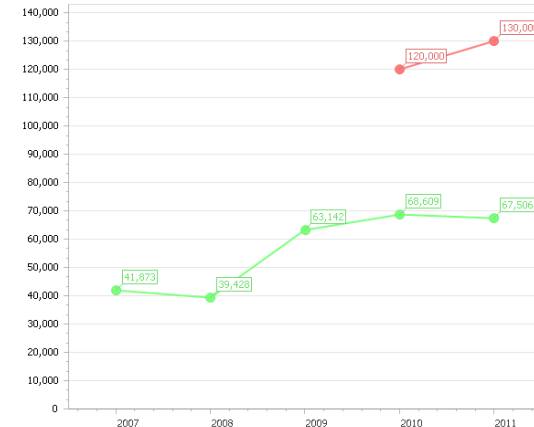
- Attractions - Number of Visits - Gardens - Hole Park Gardens (Local Authority - Ashford)
- Attractions - Number of Visits - Historic Houses / Castles - Smallhythe Place (Local Authority - Ashford)
- Attractions - Number of Visits - Historic Houses / Castles - Stocks Mill (Local Authority - Ashford)
- Attractions - Number of Visits - Museums / Art Galleries - Tenterden and District Museum (Local Authority - Ashfo
- Attractions - Number of Visits - Places of Worship - The Chapel Down Winery (Local Authority - Ashford)
- Attractions - Number of Visits - Steam Heritage Railways - Kent & East Sussex Railway (Local Authority - Ashford)



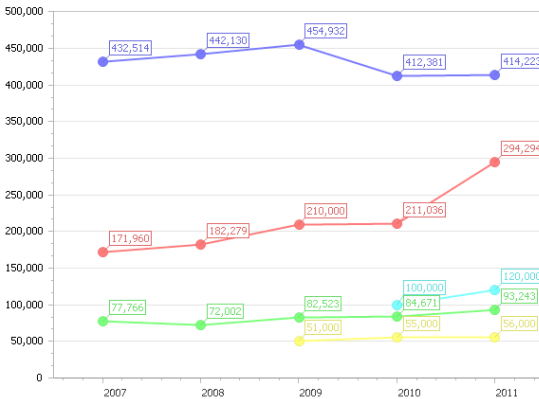
- Attractions - Number of Visits - Historic Houses / Castles - Ifield Watermill (Local Authority - Crawley)



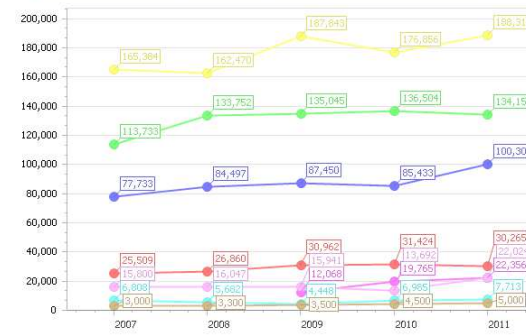
- Attractions - Number of Visits - Country Parks - Southwater Country Park (Local Authority - Horsham)
- Attractions - Number of Visits - Museums / Art Galleries - Horsham Museum (Local Authority - Horsham)



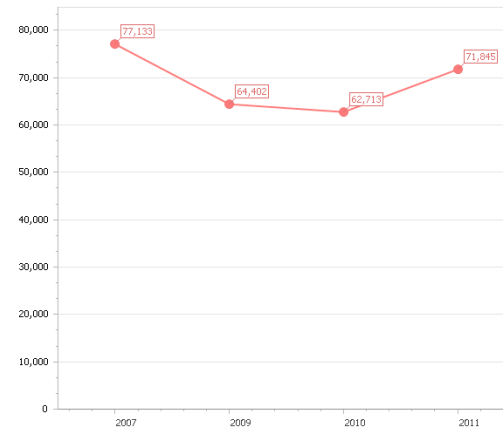
- Attractions - Number of Visits - Gardens - Nymans (Local Authority - Mid Sussex)
- Attractions - Number of Visits - Historic Houses / Castles - Standen (Local Authority - Mid Sussex)
- Attractions - Number of Visits - Historic Houses / Castles - Wakehurst Place (Local Authority - Mid Sussex)
- Attractions - Number of Visits - Leisure / Theme Parks - Blackland Farm Activity Centre (Local Authority - Mid Sussex)
- Attractions - Number of Visits - Leisure / Theme Parks - Tulleys Farm (Local Authority - Mid Sussex)

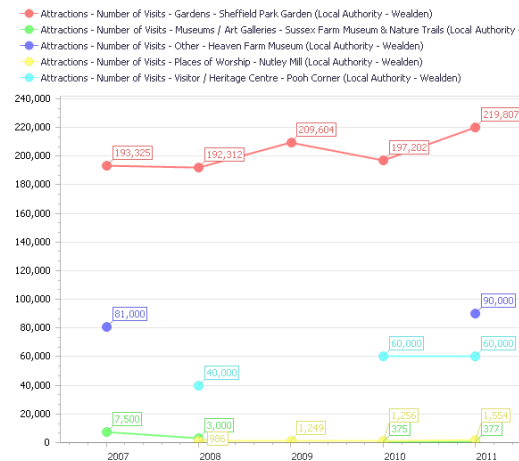


- Attractions - Number of Visits - Gardens - Pashley Manor Gardens (Local Authority - Rother)
- Attractions - Number of Visits - Historic Houses / Castles - 1066 Battle Abbey and Battlefield (Local Authority - Rother)
- Attractions - Number of Visits - Historic Houses / Castles - Batemans (Local Authority - Rother)
- Attractions - Number of Visits - Historic Houses / Castles - Bodiam Castle (Local Authority - Rother)
- Attractions - Number of Visits - Historic Houses / Castles - Lamb House (Local Authority - Rother)
- Attractions - Number of Visits - Historic Houses / Castles - Rye Castle Museum (Local Authority - Rother)
- Attractions - Number of Visits - Places of Worship - Brede Steam Engine Society - The Giants of Brede (Local Authority - Rother)
- Attractions - Number of Visits - Places of Worship - Carr Taylor Vineyard (Local Authority - Rother)



- Attractions - Number of Visits - Historic Houses / Castles - Penshurst Place and Gardens (Local Authority - Seven)





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- ³ Rural Tourism Action Plan, A Strategic Action Plan for Tourism 2010-20, Visit England
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- ⁶ Domestic Tourism, Mintel 2012
- ⁷ Executive Summary of Desk Top Research, Sustainable Tourism in our Finest Landscapes, TSE 2010
- ⁸ Strategic Framework for Tourism in Wealden, April 2010
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- ¹⁰ Kent & Medway Visitor Survey (88%) , SusTRIP November 2010; Battle (89%) and Rye (88%) Visitor Surveys, 2009, Rother District Council
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- ¹² UNWTO definition (for further tourism definitions see <http://www.acorn-tourism.co.uk/t-stats-info.html>)
- ¹³ Visiting Friends and Relatives Study, SusTRIP, Visit Kent June 2011
- ¹⁴ Intelligence Update, February 2013, Tourism South East
- ¹⁵ GBTS
- ¹⁶ Domestic Tourism, Mintel 2012
- ¹⁷ Executive Summary of Desk Top Research, Sustainable Tourism in our Finest Landscapes, TSE 2010
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- ²⁰ Domestic Tourism, Mintel 2012
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- ²² www.ourland.co.uk booking statistics
- ²³ The Beautiful South Awards for Excellence Access for All Tourism 2011 Gold Award - The Calf Shed, Bardown Farm Holiday Cottages, East Sussex
- ²⁴ Image of Britain – Post Olympics, Foresights Issue 111, VisitBritain, January 2013
- ²⁵ Strategic Framework for Tourism in Wealden, April 2010
- ²⁶ Executive Summary of Desk Top Research, Sustainable Tourism in our Finest Landscapes, TSE 2010
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- ²⁸ Forestry Commission Bedgebury Visitor Survey, 2011
- ²⁹ Trees and Woods: Good for People, Independent Panel on Forestry, July 2012
- ³⁰ Forestry Commission Bedgebury Visitor Survey, 2011
- ³¹ The Natural Choice: Securing the Value of Nature, Defra, June 2011
- ³² Battle and Rye Visitor Surveys, 2009, Rother District Council
- ³³ Greening the Weald – Developing Public Transport Access to the High Weald AONB, November 2000
- ³⁴ <http://www.visitkent.co.uk/explore/going-green>
- ³⁵ www.t-stats-uk.co.uk/visitengland/
- ³⁶ Defra Stats, 2011
- ³⁷ Swallowtail Hill, Beckley; Strand House, Winchelsea, Bardown Farm Cottages, Stonegate; www.green-business.co.uk
- ³⁸ Partnership Barometer, 2011 Tourism Overview, Kent
- ³⁹ Rural Tourism Action Plan, A Strategic Action Plan for Tourism 2010-20, Visit England
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