



**Malvern Hills Area of Outstanding Natural Beauty
Visitor Survey 1999 – 2000**

Final Report

Prepared for

Malvern Hills AONB JAC

By

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Malvern Hills Area Of Outstanding Natural Beauty Visitor Survey 1999/2000

Executive Summary

Over the twelve month survey (from March 1999 to February 2000), a total of 1,336 interviews were carried out with people using the AONB for leisure purposes, incorporating 'local residents' as well as 'bona fide' visitors. Interviewing was carried out on 90 days, over weekdays, weekends, term time and school holidays at a variety of locations across the AONB, including visitor attractions and key car parks as well as in the adjacent townships of Great Malvern and Ledbury.

Types of Visitor:

- * 52% of all visitors to the AONB are on a day trip from home
- * 20% of visitors actually live within the AONB, Great Malvern or Ledbury
- * 11% are domestic touring visitors
- * 14% are domestic visitors staying overnight in the AONB
- * 3% of all visitors are from overseas.

Origin of Day Visitors:

Over two thirds (67%) of day visitors originate from the three 'parent' counties of Worcestershire (46%), Gloucestershire (14%) and Herefordshire (7%), with an additional 17% from the West Midlands. These areas provide easy access to the AONB by road and all lie within an approximate 1-2 hours travel time from the Malvern Hills AONB.

Origin of Touring Domestic Visitors:

The greatest proportion of touring visitors (21%) originated from the Heart of England Tourist Board region. Beyond this region, the main areas of origin were in the south of the UK.

Origin of Overnight Domestic Visitors:

14% of those surveyed were UK residents staying overnight in the AONB, Great Malvern or Ledbury. The top generating counties are London (11%), West Midlands (7%) and Hampshire (5%).

Origin of Overseas Visitors:

The sample of overseas visitors is low, representing only 3% of all respondents. The leading countries of origin are Australia (19%), USA (16%), Netherlands (13%), Germany (10%) and South Africa (10%). These countries represent over two thirds (68%) of overseas visitors. 71% of overseas visitors (2% of all visitors) were 'touring' and only 29% (1% of all visitors) were staying overnight in the AONB.

Alternative Destinations

Almost half (43%) of visitors were not considering any other destinations than the AONB and day visitors were more likely to have considered an alternative destination than other market segments. Of alternative destinations listed, greatest concentrations were within the AONB 'parent' counties of Herefordshire, Worcestershire and Gloucestershire.

Activities Undertaken

75% of visitors noted 'walking' as their primary activity whilst in the AONB, with 50% walking for over 1 hour and a further 25% up to 1 hour. Taking refreshments was also popular with 43% using a pub / restaurant / café and 18% picnicking.

The Worcestershire Way

Almost two thirds of visitors had heard of the Worcestershire Way, with highest levels of awareness amongst day visitors (67%) and local residents (89%). Of those who were aware of the footpath, 60% had walked at least some part of it.

Pre-Trip Information:

Over half (57%) of visitors had not used any information prior to arriving in the AONB. The level of use varies according to the type of visit and whether or not the respondent was a new or repeat visitor. The most popular sources of information used were maps (9%), leaflets / brochures (6%) and guide books (5%).

Post Arrival Information

Over three quarters (78%) of visitors did not use any information whilst in the AONB. For those using some information, the TIC was the most popular source, used by 12% of visitors.

Only 25% of visitors could identify specific improvements in information provision. These included better maps, brochures / guides, information boards and improved waymarking.

Movement Around the AONB

Great Malvern was the most visited destination, followed by Worcestershire Beacon, Herefordshire Beacon and Ledbury. New visitors were more likely to visit these most popular locations than repeat visitors, with 16% of repeat visitors not visiting any other location than where they were interviewed.

Importance of Grassland:

When asked to rate their awareness of the importance of grassland in terms of nature conservation, almost two thirds of visitors (63%) said they were 'very aware' and a further 23% 'a little aware'.

Maintaining the Wildlife Value of Grassland:

Similar to above, visitors were asked to rate their awareness of the importance of grazing to maintain the wildlife value of the grassland. For the first six months of the survey, results were recorded on a four point scale from 'very aware' to 'don't know', with 60% of visitors claiming to be 'very aware' of the issue.

For the second half of the survey, the question was re-worded and visitors were asked to identify which management technique (from a choice of three) is most appropriate to maintain wildlife value of grassland. Again, awareness was high, with 57% of visitors indicating 'grazing' to be the most appropriate technique.

Group Structure:

39% of all groups are adult couples, with groups of adults making up another 11% of all visitors. Single visitors accounted for 31% of visitors and family groups 19%. The average party size was 2.5 people.

Socio-economic groups:

Almost half (49%) of all visitors are in the ABC1 classification. The DE group is most significant amongst day visitors and those living within the study area, perhaps reflecting the high proportion of visitors aged of 65 in these market segments.

Visitor spending in the local economy:

Overall visitor spending varies significantly between the market segments. However, the average spend for all visitors is broken down as:

Accommodation	37%
Eating / drinking out	31%
Shopping	17%
Entertainment / Attractions	5%
Transport / fuel	7%
Other	3%

1. INTRODUCTION AND METHODOLOGY

1.1 Introduction

The Heart of England Tourist Board was commissioned by the Malvern Hills Area of Outstanding Natural Beauty (AONB) Partnership in 1999 to undertake a major market research appraisal of the profile, behaviour, perceptions and value of those visiting the AONB and the adjacent townships of Great Malvern and Ledbury. The research incorporates all of those using the area for leisure purposes and therefore takes into account the significant level of activity in the AONB by 'local residents' as well as 'bona fide' visitors. For the purpose of this report, however, the term 'visitor' is used as a general description of all user groups.

The survey results provide important 'baseline' data to assist the AONB partnership to appreciate the profile and importance of visitors to the AONB and to identify the level of tourism spend in the local economy. Such market research is a basic tool of strategic planning.

1.2 Objectives of the Survey

The key objectives of the research were to;

- Identify the profile and origin visitors, to better target visitor management, interpretation and marketing activity and specifically to;
 - differentiate between patterns of visitor, and local resident, use of the AONB,
 - develop an understanding of current patterns of visitor behaviour in the AONB, as a basis for future planning and visitor management activity,
 - better understand the importance and value of different groups of visitors to the AONB,
 - assimilate information on, and better understand, visitors' motivations for visiting the AONB, their understanding of the area's designation / importance in landscape and nature conservation terms and perceptions of the area.

1.3 Methodology

The Malvern Hills AONB User Survey was carried out over a 12 month period from March 1999 to February 2000, with interviewing taking place on a total of 90 days. As such, the survey was broken into four seasonal analyses – spring (March – May 1999), summer (June – August 1999), autumn (September – November 1999) and winter (December 1999 – February 2000), with interviewing taking place on weekdays, weekends and Bank Holidays.

A total of 1,336 people were interviewed at 19 locations over the survey period (see table 1.1 and figure 1.1). Surveying was undertaken at various types of location across the AONB, including visitor attractions and key car parks, as well as in the adjacent townships of Great Malvern and Ledbury.

The survey locations were selected to ensure a balance was achieved geographically across the AONB. Initially, 14 locations were identified, from Ravenshill and Knapp and Papermill Nature Reserves in the North to Hollybush and Eastnor in the South. Over the first three months of the survey (spring season) it became evident that some sites (i.e. North and Tank Quarry and Little Malvern Priory) were not busy enough to provide an adequate sample

Table 1.1 Location of Interviews			
	Seasons Used *	No. Interviews	% of Total Sample
Black Hills	All	158	12%
British Camp	1,2,4	172	13%
Castlemorton Common / Gullet Quarry	All	79	6%
Earnslaw Quarry	2,3,4	64	5%
Eastnor Castle	1,2,3	75	6%
Eastnor Deer Park	1,2,3	56	4%
Gardeners Quarry	All	88	7%
Hollybush	All	47	4%
Knapp & Papermill Nature Reserve	1,2,3	29	2%
Ledbury	All	107	8%
Little Priors	1	2	<1%
Malvern	All	91	7%
North Quarry	1	20	2%
Picton Gardens	3	25	2%
Ravenshill Nature Reserve	1,2,3	23	2%
St Ann's Well	All	108	8%
Tank Quarry	1	2	<1%
West of England Quarry	2,3,4	78	6%
Wyche Cutting	All	112	8%

* Seasons:

1	Spring
2	Summer
3	Autumn
4	Winter

2. TYPE OF VISITOR

2.1 Visitor Segmentation

The survey data has been analysed in two ways. Firstly, by considering all visitors as a single market, and secondly by segmenting visitors into different groups according to the type of trip made. This approach helps to establish the differences, and similarities, between different types of visitor. Detailed information about various groups of visitors will assist in improving the effectiveness of targeting marketing activity, visitor management and product development.

Visitors can be divided into three segments according to the type of trip they are making;

1.	Day Visitors	<i>The 'day out' market – visitors who start their journey from home and return there on the same day, includes people travelling independently or in a group.</i>
2.	Touring Visitors	<i>Those visitors who are staying overnight away from home, but are not staying overnight in the Malvern Hills AONB. For example a family on holiday in Worcester may come to the AONB for a day or someone stopping off in the AONB en-route from home to another holiday destination.</i>
3.	Overnight Visitors	<i>Those visitors who spend one or more nights in the Malvern Hills AONB. This sector of the market includes those staying with family and friends as well as those using commercial accommodation.</i>

For the purpose of this study, a fourth category of those '*living within the study area*' was also included to further differentiate the profile and behaviour of local resident use of the AONB. This category included all respondents living within the AONB and the adjacent townships of Great Malvern and Ledbury.

The three standard groups are subdivided into visitors who are resident in the UK and those from overseas. Figure 2.1 illustrates the structure of the survey sample visitor market according to type of trip made.

2.2 Visitor Type at Interview Locations

The variation in visitor type across the interview locations is seen in table 2.1.

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Local Area
AONB Overall	52%	11%	14%	2%	1%	20%
Black Hills	54%	4%	7%	1%	1%	33%
British Camp	69%	10%	10%	1%		10%
Castlemorton Common	62%	5%	10%	-	-	23%
Earnslaw Quarry	53%	2%	8%	-	-	38%
Eastnor Castle	59%	27%	3%	1%	-	8%
Eastnor Deer Park	38%	-	59%	-	-	2%
Gardeners Quarry	61%	6%	11%	1%	-	20%
Hollybush	45%	15%	17%	-	-	23%
Knapp & Papermill Nature Reserve	76%	7%	7%	-	-	10%
Ledbury	32%	25%	28%	7%	2%	6%
Little Priory	-	-	-	50%	50%	-
Malvern	34%	24%	21%	2%	3%	12%
North Quarry	15%	15%	10%	5%	-	55%
Picton Gardens	80%	16%	4%	-	-	-
Ravenshill Nature Reserve	52%	13%	4%	-	-	30%
St Ann's Well	42%	5%	21%	3%	1%	29%
Tank Quarry	100%	-	-	-	-	-
West of England Quarry	53%	13%	8%	-	1%	26%
Wyche Cutting	54%	4%	10%	3%	1%	28%

For the vast majority of interview locations, the largest proportion of visitors interviewed were 'day visitors', generally varying between one third and three quarters of respondents. In contrast, at North Quarry over half (55%) of respondents were local residents and, at Eastnor Deer Park, 59% were overnight visitors which is to be expected given that this is the location of a caravan site.

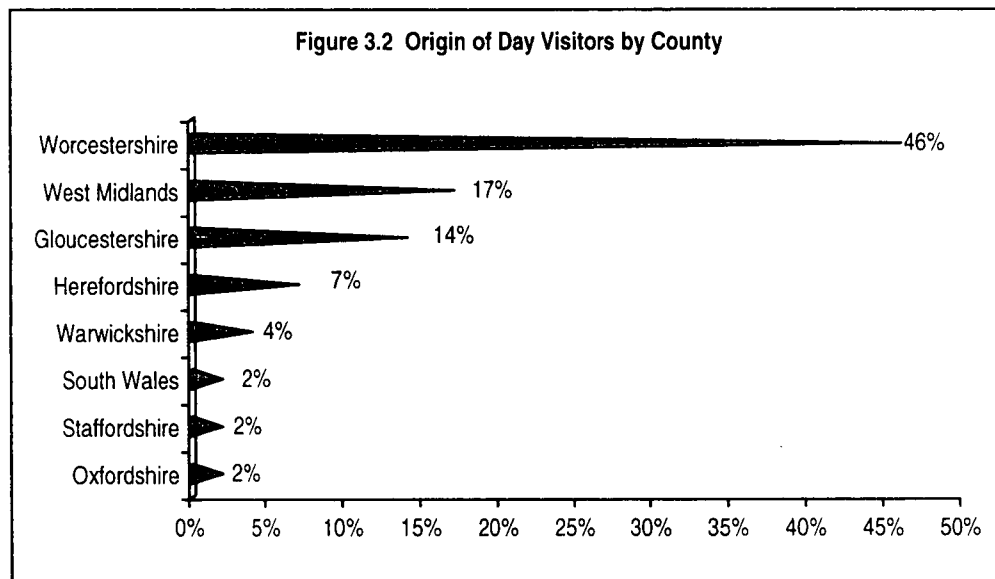
3. ORIGIN OF VISITORS

3.1 Categorising the Visitor

Respondents were asked to state their normal place of residence. For domestic (UK) visitors the county of origin has been used as the basis for analysis and for overseas residents the country of origin is used. Figure 3.1 indicates the origin of all domestic visitors interviewed. The data has also been analysed according to the four main types of visit – day, touring, overnight and overseas.

3.2 Day Visitors

The catchment area for the day trip sector, excluding those respondents living within the survey area, is quite clearly focused on western England and Wales, as indicated in figure 3.2. Over two thirds (67%) of day visitors originate from the three 'parent' counties of Worcestershire (46%), Gloucestershire (14%) and Herefordshire (7%), with an additional 17% from the West Midlands. These areas provide easy access to the AONB by road and all lie within an approximate 1-2 hours travel time from the Malvern Hills AONB. After these 'top 8' counties, a further 20 counties generated one or more day visitors to the AONB.



In terms of Regional Tourist Board area, the Heart of England region is the leading provider of day visits, with 92% from this area (Derbyshire, Herefordshire, Leicestershire, Lincolnshire, Northamptonshire, Nottinghamshire, Rutland, Shropshire, Staffordshire, Warwickshire, West Midlands, Worcestershire), even though the AONB is located in the extreme south west of the region.

Appendix 2 details the area of responsibility for each of the Regional Tourist Boards.

Heart of England Tourist Board	92%
Wales	3%
Southern	2%
West Country	2%
East of England	1%
South East	<1%
North West	<1%
Yorkshire	<1%
London	<1%

3.3 Touring Visitors

A total of 11% of respondents were described as 'UK touring visitors'. Touring visitors generally have many of the characteristics associated with the overnight visitor, for example a higher rate of expenditure and propensity to visit attractions. They are an important market as they are people staying away from home, who have decided to visit the AONB and, although not staying overnight within the AONB on this visit, could be influenced to stay within the AONB on a future visit.

Table 3.2 indicates that over one fifth (21%) of touring visitors originated from the Heart of England region. Beyond this region, the main areas of origin for touring visitors were in the south of the UK i.e. the Southern, East of England, South East and West Country Tourist Board areas. By comparison, there are relatively few touring visitors from the northern regions.

Heart of England Tourist Board	21%
Southern	15%
East of England	11%
West Country	9%
South East	9%
North West	8%
London	7%
Yorkshire	6%
Northumbria	5%
Scotland	4%
Wales	3%
Cumbria	1%

3.5 Overseas Visitors

Over the 12 month survey period, only 31 overseas visitors were interviewed, representing only 3% of all respondents.

Table 3.4 indicates the country of origin for overseas visitors to the AONB, combining the touring and overnight markets.

Australia	19%
USA	16%
Netherlands	13%
Germany	10%
South Africa	10%
Italy	6%
Ireland	6%
Belgium	3%
Spain	3%
Switzerland	3%
Canada	3%
Rest of Asia	3%
Rest of Africa	3%

English speaking nations (Australia, USA, Ireland and Canada) represent 45% of all overseas visitors and the easily accessible northern European markets of the Netherlands, Germany and Belgium, an additional 26%.

A breakdown of the profile, behaviour and spend patterns of this overseas market is included in subsequent chapters of this report.

4. NEW / REPEAT VISITORS

4.1 Segment Variation

Visitors were asked if they had ever visited the Malvern Hills AONB previously and, if so, what type of trip it had been. The presence of first time visitors to the AONB is important in terms of visitor management, presuming their lack of local knowledge of the local area. Over four fifths of respondents (87%) are repeat visitors. In many respects, the repeat visitor is the easier to attract as they will know the general nature of what a visit is likely to involve, for example, how long it takes to get there, what there is to see and do. It is worth noting, however, that being a repeat visitor does not automatically mean that the knowledge of the Malvern Hills AONB and the surrounding area and its attractions is comprehensive and, furthermore, repeat visitors may have entrenched patterns of behaviour that it may be difficult to influence through visitor management.

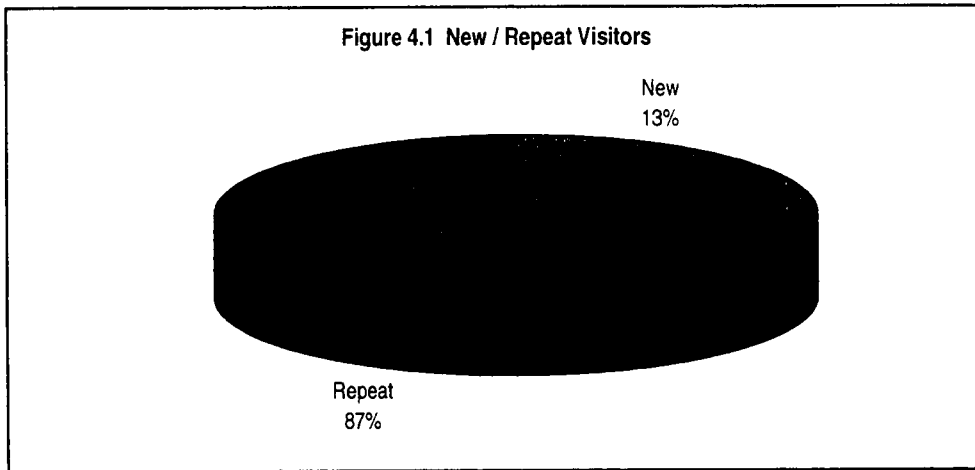
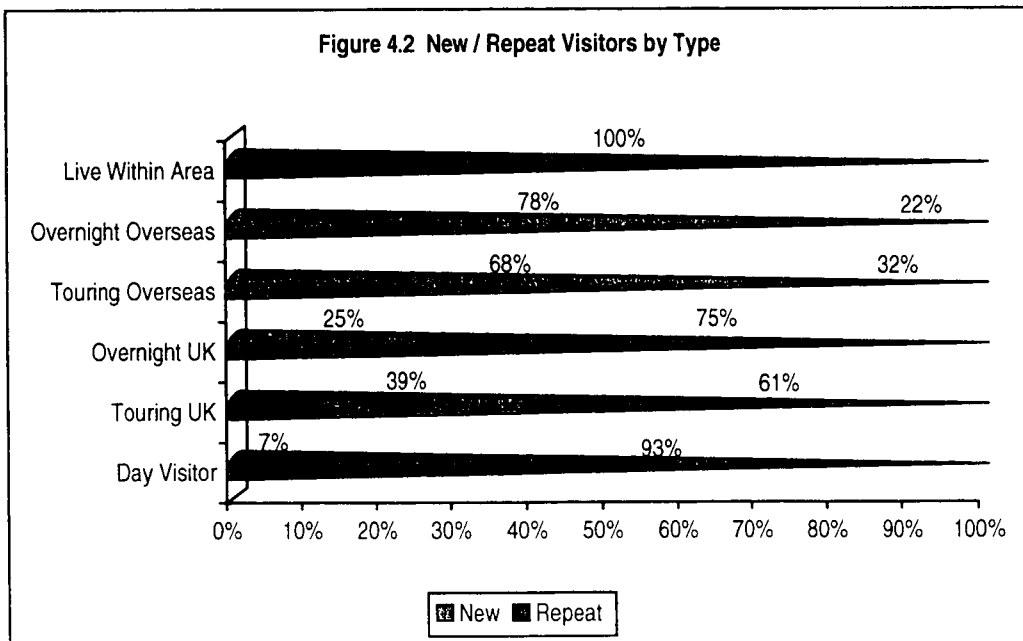


Figure 4.2 indicates the variation in new and repeat visitors between the various market segments.



4.3 Number of Times Visited in the Last 12 Months

Visitors who had been to the AONB before were asked how many times they had visited in the past 12 months. A number of respondents gave the vague response of 'many' or 'frequently' and therefore it is not possible to calculate an accurate average number of visits. However, from the more precise responses it is estimated that repeat visitors make, on average, 7.3 trips to the AONB each year, although given the more frequent visitors, this figure could be higher.

Table 4.2 details the variation in the average number of visits to the AONB in the last 12 months for each market segment, indicating, as expected, a greater frequency of visits amongst day visitors.

	Average	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas
Average No. Visits	7.3	9.4	2.3	2.2	N/A *	N/A *

* Sample base too small to analyse

of 1.7 nights for those staying in youth hostels, 2.3 nights in serviced accommodation, 5.9 nights in caravan / campsites and 6.2 nights for visitors in self-catering accommodation.

For the overseas overnight market, the average length of stay was slightly longer than the domestic market, at 4.7 nights. However, this analysis is based on data from only 7 respondents and therefore must be interpreted with caution.

All UK Overnight		4.3 nights
UK Overnight	serviced accommodation	2.3 nights
	self-catering	6.2 nights
	caravan / camping	5.9 nights
	friends / relatives	3.9 nights
	youth hostel	1.7 nights
All overseas overnight		4.7 nights
Overseas Overnight	serviced accommodation	3.4 nights
	friends / relatives	2 nights

5.2 Retaining Visitors

Another measure of the AONB's appeal to visitors is to ask, of the total number of nights available to a visitor on holiday, how many is the visitor prepared to spend in the AONB. A visitor from Scotland, for example, having 10 nights available who decides to spend 5 nights in the Peak District, 3 nights in Derby and 2 nights in the Malvern Hills AONB provides an index of 0.5, 0.3 and 0.2 respectively for the aforementioned destinations.

For the UK residents staying overnight in the area:

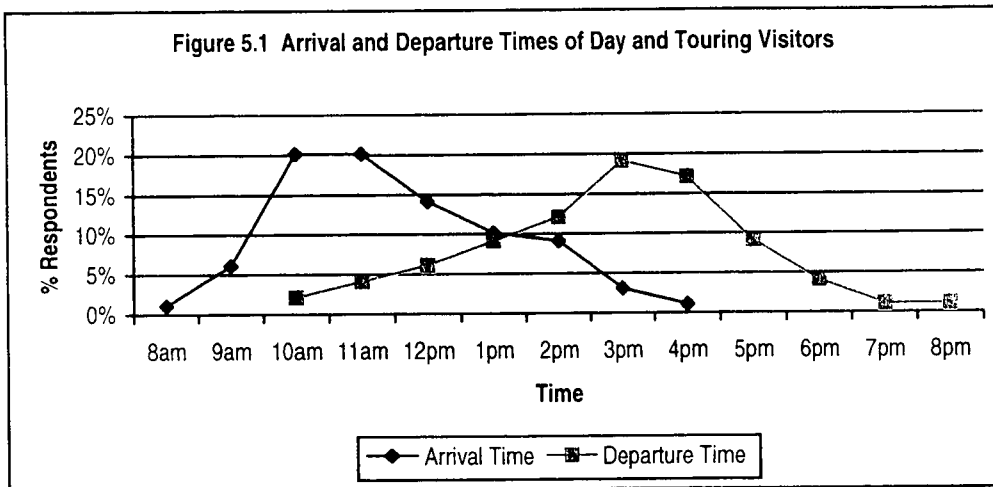
<u>Total nights in AONB</u>	<u>808</u>
Total nights on Trip	1682

This gives an index rate of 0.5 or, that UK visitors elected to spend 50% of their available nights in the Malvern Hills AONB.

This figure is slightly lower than for other local areas, with results in Worcestershire providing an index of 0.7, the Wye Valley and Vale of Usk an index of 0.8 and for Herefordshire an index of 0.9. This indicates that proportionately less time of a whole trip is spent in the AONB, compared to these other destinations, again perhaps reflecting the more limited range of activities on offer in the AONB.

The average length of time spent in the AONB by new visitors is 3 hours 18 minutes, slightly longer than for the average repeat visitor at 2 hours 55 minutes.

Figure 5.1 illustrates the fluctuation in visitor arrival and departure times throughout the day, indicating a peak in arrivals between 10am and 11am and departures between 3pm and 4pm.



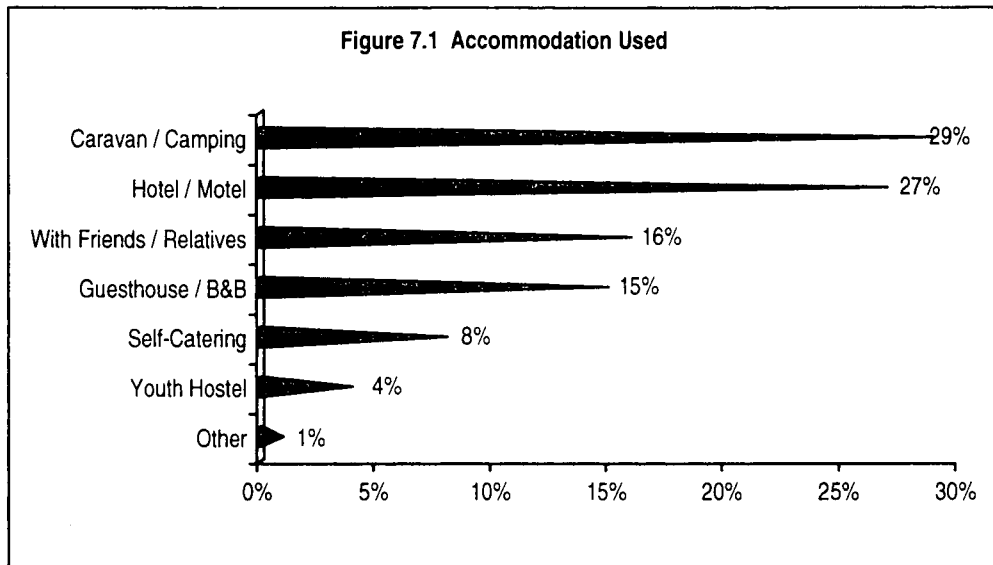
The variation in decision times by new and repeat visitors is detailed in table 6.2. The most significant difference is seen in those visitors deciding to visit 'today' (21% new, 49% repeat).

	New	Repeat
Today	22%	49%
Yesterday	15%	12%
Within Last Week	20%	16%
Within Last Month	17%	9%
Within Last 1-3 Months	11%	6%
Within Last 3-6 Months	8%	3%
Longer	5%	3%

7. ACCOMMODATION

7.1 Accommodation Used in the AONB

Figure 7.1 shows the type of accommodation used by overnight visitors in the AONB.



Almost one third (29%) of all overnight visitors were using caravan / camping accommodation, closely followed by hotels (27%). 16% of visitors were staying with friends and relatives (VFR), a typically underestimated and undervalued market segment.

The apparent significance of caravan / camping accommodation may have been influenced by interviewing taking place at Eastnor Deer Park, a seasonal caravan / camping site. However, this site is an important accommodation facility for the area, given the restricted number of pitches elsewhere in the AONB, due to stringent planning controls. It is interesting to note that one third (33%) of all respondents using caravan and camping accommodation were actually staying beyond the AONB boundary, most notably at the Blackmore Caravan Site.

Self-catering accommodation was used by only 8% of all overnight visitors, similar to the level of use seen in Worcestershire (7%), but significantly lower than in the Wye Valley and Vale of Usk (12%) and Herefordshire (17%). This relatively low level of use perhaps reflects the fairly modest supply of self-catering establishments in the AONB, particularly with regard to high quality establishments.

The wider self-catering sector, however, represents an important market for the AONB, with non-serviced sources in total, (including VFR, caravan / camping, self-catering and youth hostels) accounting for 57% of all overnight accommodation.

	Hotel / Motel	Guesthouse / B&B	Self-Catering	Caravan / Camping	VFR	Youth Hostel	Other
Great Malvern	51%	20%	4%	2%	20%	-	3%
Eastnor	-	-	-	100%	-	-	-
Ledbury	42%	25%	16%	-	17%	-	-
Malvern Wells	33%	13%	7%	-	7%	40%	-
Colwall	8%	25%	17%	8%	42%	-	-

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Car	93%	91%	84%	73%	56%	52%
Walked	<1%	-	2%	-	11%	13%
Train	2%	1%	6%	5%	-	<1%
Tour Coach	1%	4%	1%	23%	33%	-
Motorcycle	2%	-	1%	-	-	<1%
Bicycle	1%	-	1%	-	-	3%
Van / Minibus	1%	-	2%	-	-	-
Camper Van	<1%	2%	3%	-	-	-
Public Bus	<1%	1%	1%	-	-	<1%
Hills Hopper	<1%	-	1%	-	-	1%
Other	<1%	-	-	-	-	-

Table 8.1 indicates the variation in mode of transport across the market segments. For example, 93% of day visitors arrived by car, falling to 68% of overseas visitors. Overseas visitors also made significant more use of tour coaches.

	New	Repeat
Car	88%	82%
Walked	-	4%
Train	3%	2%
Tour Coach	6%	1%
Motorcycle	-	1%
Bicycle	-	1%
Van / Minibus	-	1%
Camper Van	2%	1%
Public Bus	1%	1%
Hills Hopper	-	<1%
Other	1%	<1%

Repeat visitors to the AONB made use of a wider range of transport options, although for both new and repeat visitors, use of the car was dominant (88% new, 82% repeat)

8.3 Reasons for Not Using Public Transport

Respondents were also asked to indicate why they had not used public transport for their visit.

Not Convenient / Flexible Enough	47%
Not Available for This Journey	28%
No Knowledge of Options	16%
Other	7%

Almost half (47%) of respondents regarded public transport as not being convenient or flexible enough for their journey. The most frequently cited 'other' responses included; 'inability to take dogs', 'having too much equipment' and 'cost'.

Table 9.1 indicates variations between market segments. Walking was the most frequently cited reason for all visitor markets, with proportions varying from 53% to 78%. 55% of overseas touring visitors were enjoying a 'general countryside visit' and 22% of domestic overnight visitors were 'participating in outdoor activities'. Of those 'visiting an event' over one third (36%) were staying overnight in the AONB.

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Walking	68%	53%	56%	55%	56%	78%
General Countryside Visit	26%	37%	35%	55%	33%	11%
Peace & Quiet	20%	19%	19%	14%	11%	10%
Enjoyed a Previous Visit	19%	16%	13%	5%	-	2%
To Meet Family / Friends	8%	24%	25%	41%	22%	3%
Easy To Get To / Close By	16%	4%	6%	5%	-	4%
Participate in Outdoor Activities	9%	6%	22%	14%	-	14%
Dog Walking	8%	4%	4%	5%	-	25%
Visit Attraction	10%	19%	7%	14%	-	4%
Visit Event	7%	6%	19%	9%	33%	5%
New Place To Come To	3%	23%	13%	18%	11%	1%
Just Passing Through	4%	13%	2%	14%	-	-
Refreshments	4%	1%	3%	-	-	4%
Variety of Things To See & Do	2%	4%	5%	9%	-	1%
Recommendation from Others	1%	1%	4%	5%	-	-
Educational Visit	-	1%	1%	1%	-	-
Other	4%	4%	3%	-	-	5%

10. ALTERNATIVE DESTINATIONS

10.1 Alternative Destinations to the Malvern Hills AONB

Respondents were asked to indicate where else they were considering to visit if they had not made their trip to the AONB. As no prompts were given, a wide variety of responses were given. However, almost half (43%) of visitors said they were not considering any other destinations and a further 29% gave no reply, which could also be interpreted as a similar response.

Figure 10.1 provides an indication of the alternative destination noted by respondents.

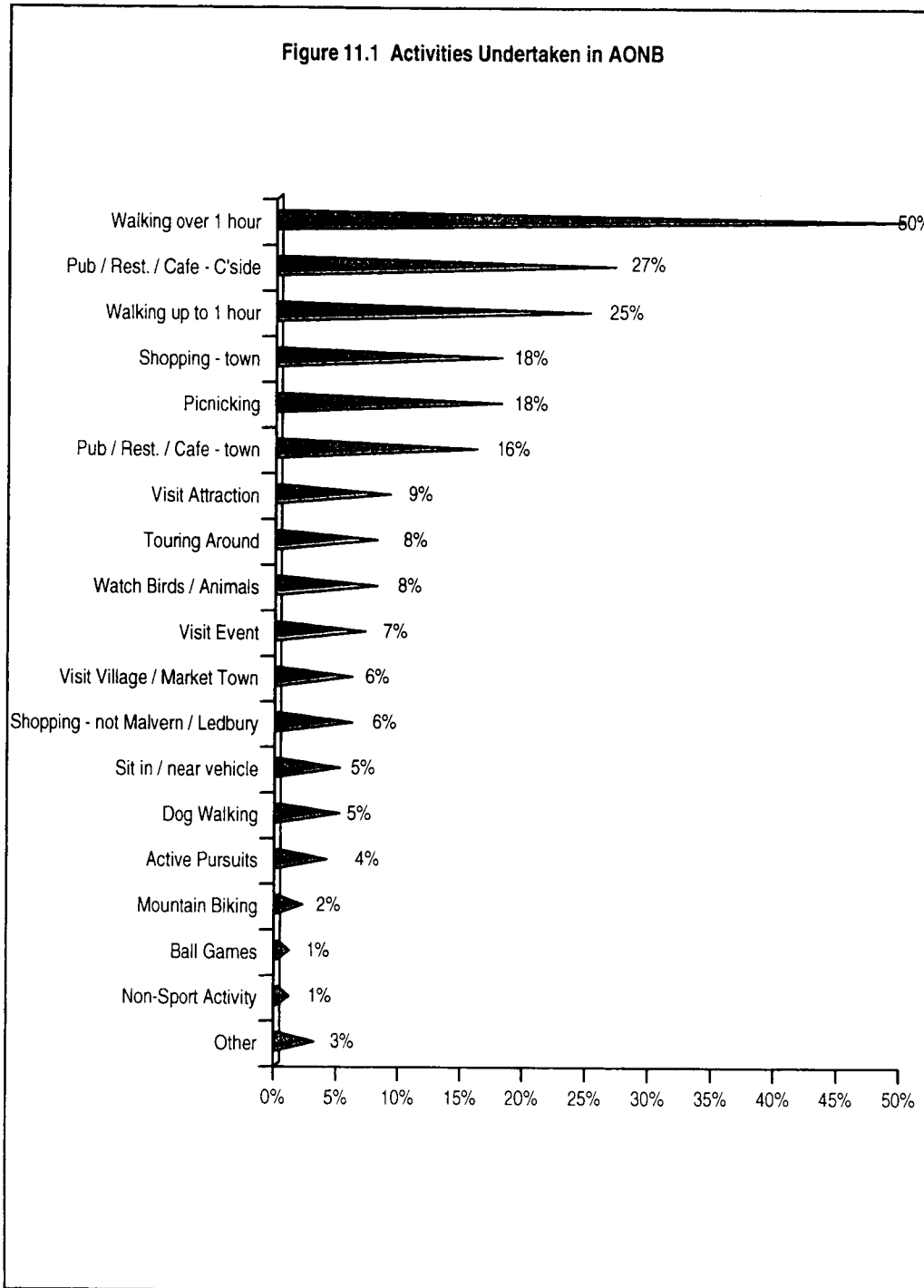
Analysis by market segment reveals that day visitors were more likely to have considered alternative destination, however for those respondents living within the local area, all of these alternatives were within the 'parent' counties of the AONB, i.e. Herefordshire, Worcestershire and Gloucestershire.

Repeat visitors were also much more likely to have considered an alternative destination than those visiting the AONB for the first time.

11. ACTIVITIES UNDERTAKEN IN THE AONB

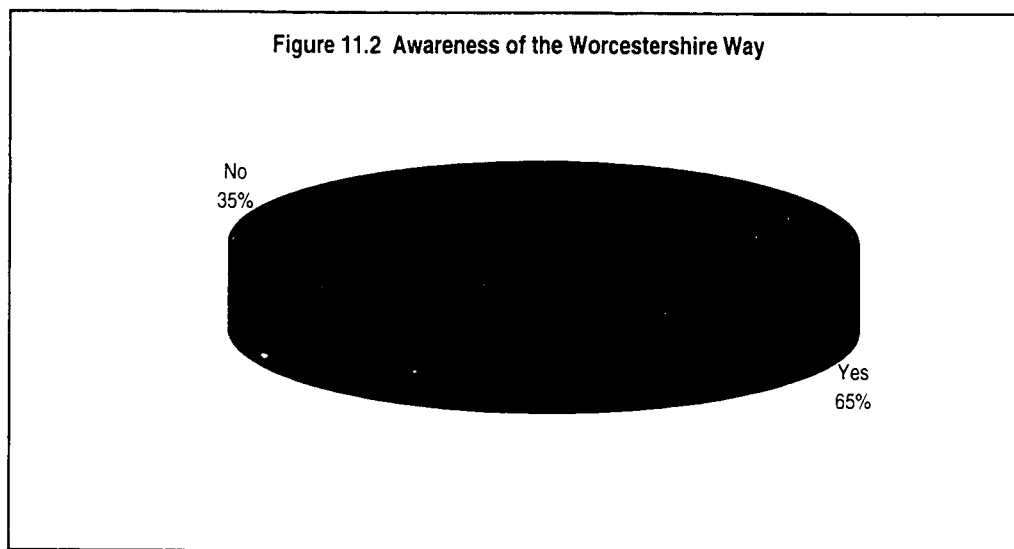
11.1 Activities Undertaken

Respondents were shown a 'flash card' listing a range of activities and asked to indicate all of which they had been involved in whilst in the AONB.



11.3 Awareness of the Worcestershire Way

Given that walking was the dominant activity for the majority of visitors to the AONB, respondents were asked about their awareness and use of the Worcestershire Way, a long distance footpath traversing much of the AONB.



Almost two thirds (65%) of all respondents had heard of the Worcestershire Way – a relatively high proportion given the limited marketing / promotion activity devoted to the footpath over the last few years and perhaps more a consequence of the length of time the Worcestershire Way has been established (11 years). Table 11.2 indicates the variation in this awareness between the various market segments. Local residents and day visitors were most aware of the path and overseas visitors least aware.

	Day Visitor	UK Touring	UK Overnight	Overseas Touring	Overseas Overnight	Live Within Area
Yes	67%	36%	47%	14%	22%	89%
No	31%	59%	49%	86%	67%	10%

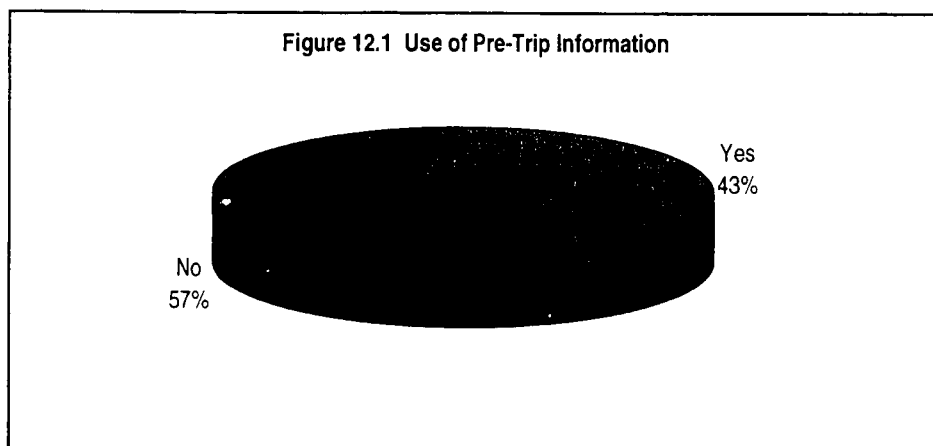
11.4 Use of the Worcestershire Way

Of those respondents who were aware of the Worcestershire Way, 60% had walked some part of it, and a further 5% were unaware as to whether they had used the path or not.

12. SOURCES OF INFORMATION

12.1 Pre-Trip Information

Respondents were asked if they had used any sources of information in planning their visit, before arrival. Over half (57%) of respondents did not use any information before arriving in the AONB, as illustrated in figure 12.1. However, use of pre-trip information is slightly higher in the AONB compared to other local areas, as indicated in table 12.1.



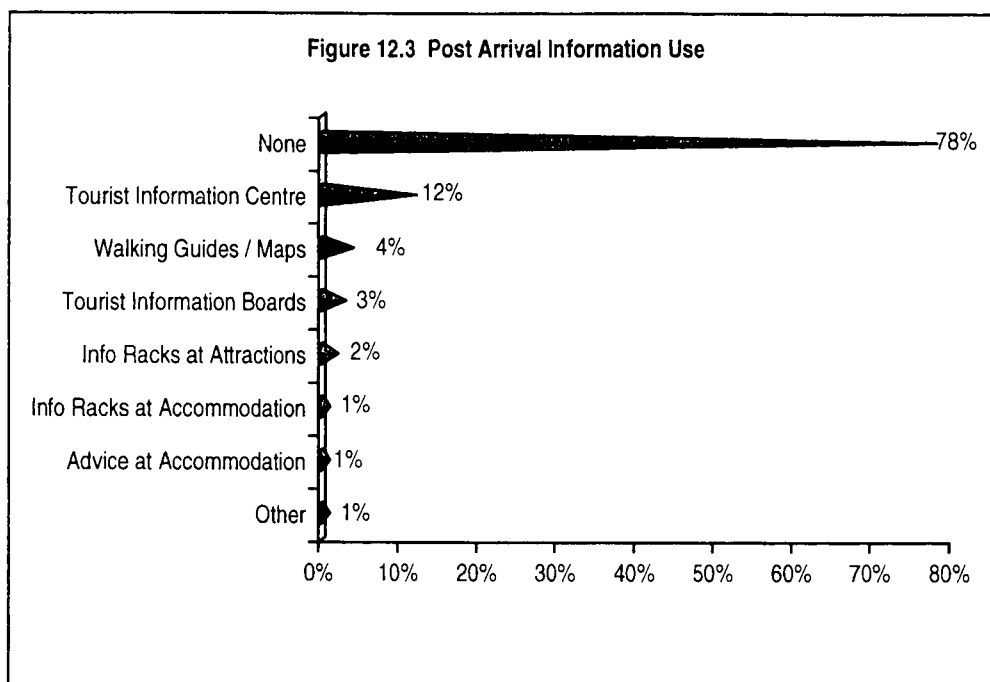
	Yes	No
Malvern Hills AONB	43%	57%
Worcestershire (1998)	34%	66%
Herefordshire (1999)	41%	59%
Wye Valley & Vale of Usk (1999)	36%	64%

12.2 Type of Information Used

Respondents were asked to indicate the type of information used in advance of their visit. Figure 12.2 and table 12.2 indicate the overall level of use and the type of information used by all visitors and the different market segments.

12.3 Post Arrival Information

Respondents were asked if they had already used, or intended to use any sources of information having arrived in the AONB. Figure 12.3 shows the sources used.



Over three quarters (78%) of respondents stated they had no intention of using any information whilst in the AONB. For those using information, the Tourist Information Centre (TIC) was the most popular source.

As indicated in table 12.3, the TIC was the main source of information for all market segments and was the only source of information used by overnight overseas visitors.

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
None	88%	58%	52%	55%	56%	88%
Tourist Information Centre	5%	31%	34%	27%	44%	3%
Tourist Information Boards	3%	4%	8%	5%	-	1%
Walking Guides / Maps	3%	11%	7%	9%	-	-
Info Racks at Attractions	1%	6%	4%	5%	-	<1%
Info Racks at Accommodation	-	2%	6%	5%	-	-
Advice at Accommodation	-	3%	2%	5%	-	-
Other	<1%	2%	1%	-	-	<1%

As with pre-trip information, new visitors made significantly greater use of information than repeat visitors, with over 50% using some form of information, compared to only 17% of repeat visitors.

13. MOVEMENT AROUND THE AONB

13.1 Other Local Areas Visited

Visitors were asked which other local areas they had visited or intended to visit as part of their trip to the AONB. A list of local areas was provided as a prompt.

Over three quarters (77%) of respondents provided some detail of where else they had been, or intended to visit within the AONB, with almost one fifth (19%) of these stating they would be visiting no other local destinations.

Table 13.1 indicates the key findings, for all visitors and by market segment.

	Total	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Great Malvern	38%	24%	35%	55%	50%	67%	18%
Worcestershire Beacon	20%	17%	20%	18%	18%	11%	8%
Herefordshire Beacon	20%	17%	25%	18%	5%	11%	6%
Ledbury	18%	9%	24%	36%	32%	22%	2%
Colwall	8%	5%	6%	11%	5%	11%	3%
Eastnor / Castle	7%	5%	6%	12%	9%	22%	1%
St Ann's Well	6%	4%	6%	7%	-	-	3%
Malvern Wells	5%	3%	4%	11%	5%	-	1%
Castlemorton / Welland	5%	4%	1%	6%	-	11%	2%
West Malvern	2%	2%	1%	4%	5%	11%	-
The Commons	2%	1%	1%	6%	-	-	-
None	19%	16%	10%	9%	14%	-	21%
Other	4%	2%	4%	6%	9%	-	2%
Outside AONB	5%	3%	6%	6%	9%	-	4%

Great Malvern was the most visited destination by all market segments. As expected, given the longer average length of stay, there is more movement around the AONB by touring and overnight visitors.

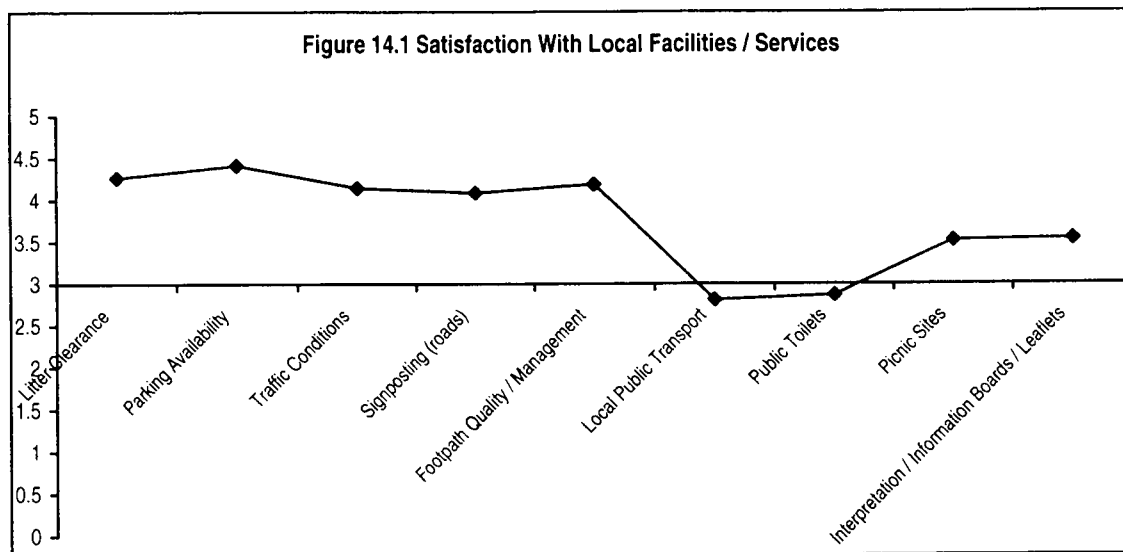
40% of 'bona fide' day visitors interviewed in the AONB proper, also visited Malvern and / or Ledbury during their visit. Table 13.2 details other areas visited by day visitors interviewed in Malvern and Ledbury, indicating the popularity of Herefordshire and Worcestershire Beacon and, particularly for those in Malvern, St Ann's Well.

New visitors were more likely to visit the most popular areas such as Great Malvern (44% new, 28% repeat), Ledbury (24% new, 12% repeat), Herefordshire Beacon (22% new, 14% repeat) and Worcestershire Beacon (18% new, 15% repeat) than repeat visitors. 16% of repeat visitors did not visit any other destinations – compared to only 10% of new visitors.

14. SATISFACTION AND SUGGESTED IMPROVEMENTS

14.1 Evaluation of Local Facilities / Services

Respondents were asked to rate their satisfaction with a number of local services / facilities on a 1-5 scale (1 being very poor and 5 very good).



As seen in figure 14.1, the highest scoring services / facilities were parking availability (4.4) and litter collection (4.3). Visitors gave the lowest scores for public toilets (2.9) and local public transport (2.8). Public toilets are generally rated the worst in satisfaction scores in visitor surveys across the Region. However, the score of 2.9 is lower than corresponding scores in other local areas, such as Herefordshire (3.8) and Worcestershire (3.7), and the Regional average of 3.5.

14.2 Evaluation of Waymarking

More specifically, respondents were asked for their opinion on the quality of footpath signing / waymarking in the AONB. Over one third (35%) of respondents either did not reply or gave a 'don't know' response. From all other responses, using a 1-5 scale from 'very badly' to 'excellently', the average (mean) score was 3.7, indicating that visitors had a generally positive view of footpath waymarking.

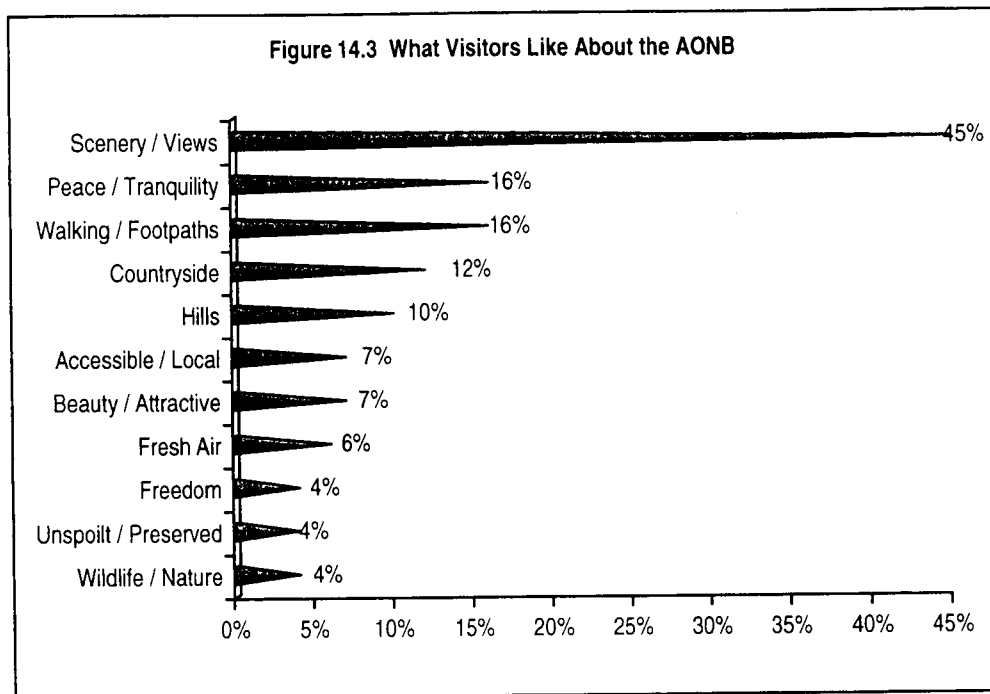


Figure 14.3 highlights the most popular responses, indicating the prominence of 'scenery / views', was noted by almost half (45%) of all respondents. This was also the most popular response by most market segments, with the exception of overnight overseas visitors, where 'countryside' was most frequently cited.

Table 14.2 Like About Area by Type of Visitor

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Scenery / Views	47%	40%	42%	41%	22%	45%
Peace / Tranquillity	19%	11%	14%	18%	22%	15%
Walking / Footpaths	15%	12%	14%	5%	-	25%
Countryside	9%	21%	17%	14%	45%	7%
Hills	11%	15%	7%	5%	-	9%
Accessible / Local	8%	1%	4%	-	-	10%
Beauty / Attractive	5%	5%	8%	5%	33%	11%
Fresh Air	6%	6%	4%	5%	-	9%
Freedom	5%	1%	5%	5%	-	4%
Unspoilt / Preserved	4%	6%	3%	5%	11%	4%
Wildlife / Nature	3%	1%	4%	5%	11%	5%

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Nothing	52%	49%	49%	64%	22%	29%
No Reply	23%	27%	26%	14%	22%	29%
Dog Mess / Too Many Dogs	7%	6%	2%	5%	-	14%
Cyclists / Mountain Bikers	3%	1%	1%	-	-	10%
Congestion / Crowded / People	2%	3%	2%	-	11%	4%
Parking / Traffic Issues	3%	1%	2%	5%	-	2%
Litter	2%	1%	2%	-	-	5%
Weather	1%	4%	4%	5%	-	2%
Poor Quality Paths / Mud	2%	1%	1%	-	-	3%
Poor Waymarking	1%	1%	3%	-	-	1%
Horses	1%	-	-	-	-	2%
Toilets	1%	-	1%	-	-	1%

Public expectations are continually rising and any short comings in visitor management throughout the AONB are reflected in levels of visitor satisfaction, which, in turn, influences future visits, length of stay and recommendations to future visitors. The importance of visitor satisfaction can not therefore be over emphasised.

14.5 Volume of Activity

To assess the general volume of activity within the AONB, in terms of people, cars and coaches, respondents were asked to indicate how busy they felt the area to be on a scale of 1 (very quiet) and 5 (very busy).

Over the 12 month period, the average (mean) score was 2.1, indicating that visitors generally regarded the AONB as 'quiet'. Table 14.5 illustrates how this average figure varied between each interviewing season.

Spring (March – May 1999)	2.5
Summer (June – August 1999)	2.3
Autumn (Sept – Nov 1999)	1.6
Winter (Dec 1999 – Feb 2000)	1.7

15. KNOWLEDGE / AWARENESS OF AONB ISSUES

15.1 Knowledge of the Term 'AONB'

Over four fifths (92%) of respondents stated they had heard of the term 'AONB', as indicated in figure 15.1.

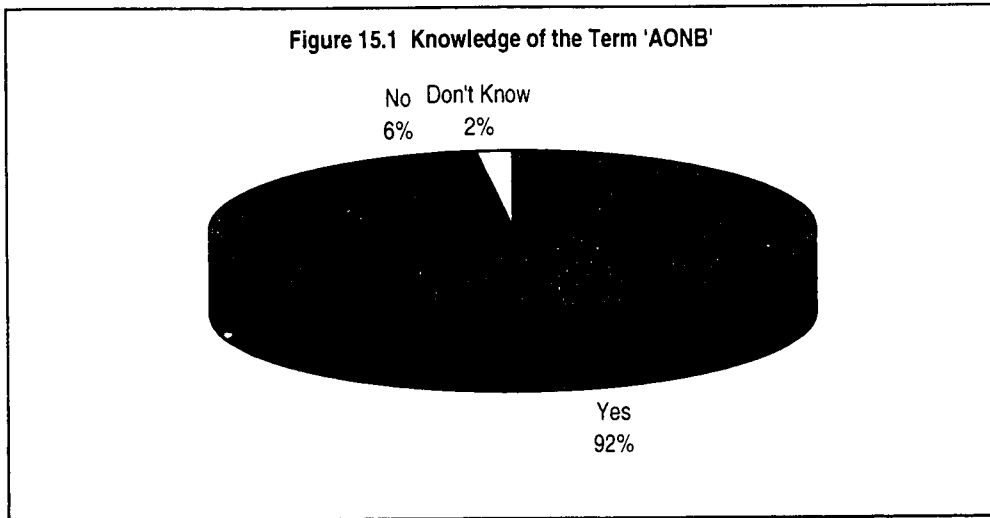


Table 15.1 details the awareness of the term amongst the market segments. In all UK segments (day, touring and overnight visitors), over 90% of respondents had heard of the term. This figure was, as would be expected, significantly lower for overseas visitors.

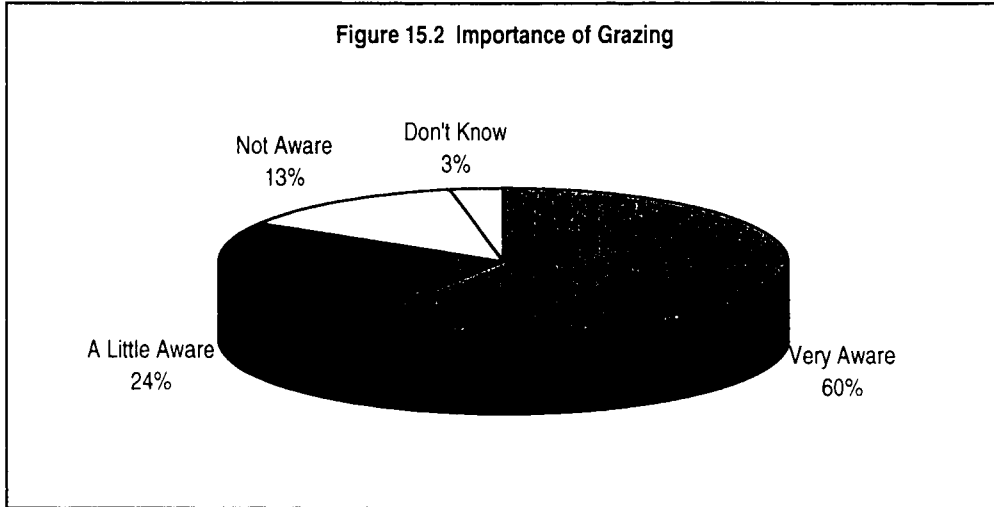
	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Yes	92%	90%	90%	38%	38%	96%
No	6%	7%	6%	62%	38%	2%
Don't Know	2%	3%	4%	-	28%	1%

Repeat visitors were significantly more likely to have heard of the term AONB, compared to first time visitors.

	New	Repeat
Yes	79%	93%
No	17%	5%
Don't Know	4%	2%

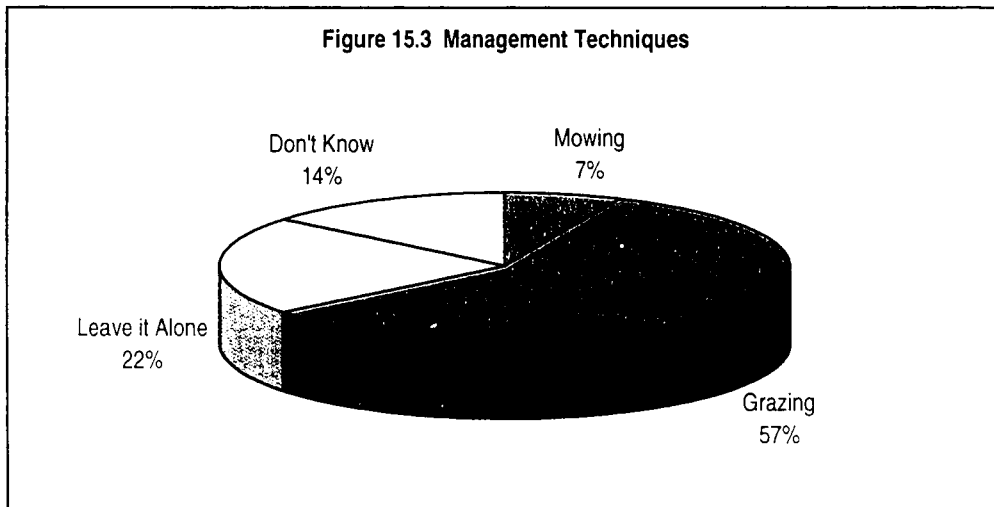
15.4 Maintaining the Wildlife Value of Grassland

In a similar question, respondents were asked to rate their awareness of the importance of grazing to maintain the wildlife value of the grassland. For the first six months of the survey, responses were recorded on a 4 point scale (very aware, a little aware, not aware and don't know). The results from this first six months (shown in figure 15.2) indicated that over half (58%) of respondents considered themselves to be 'very aware' of this issue.



Although this could be a true reflection of visitors' knowledge of landuse issues, it is also possible that the wording of the question generated 'skewed' results, as respondents may have been unwilling to admit they were unaware of the issue. As such, for the remaining six months of the survey, the wording of the question was altered, providing respondents with three alternative forms of management which could be employed – mowing, grazing or leaving it alone.

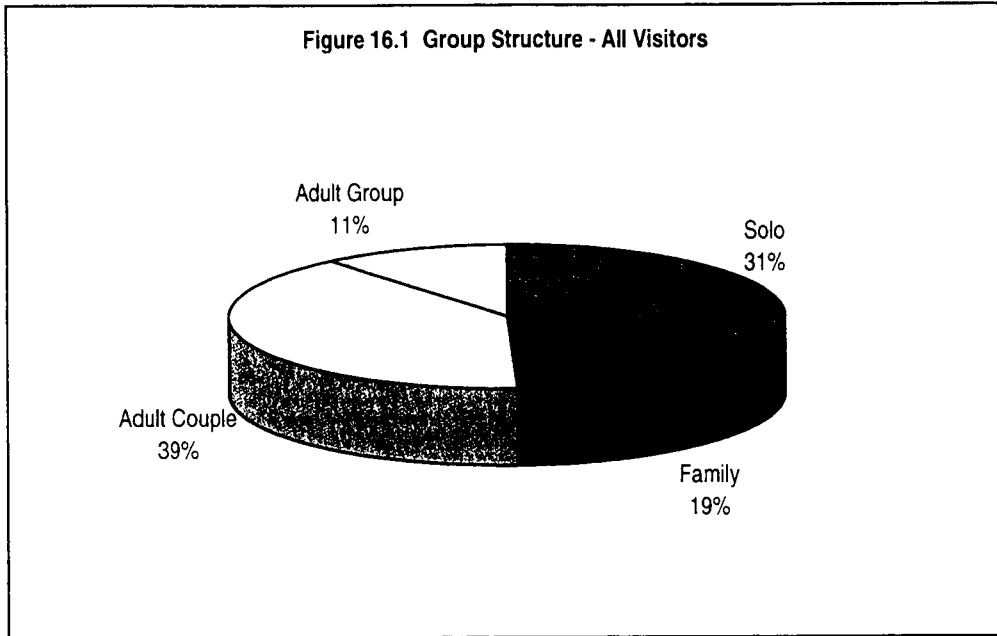
Figure 15.3 details the results from this second six month period, indicating a continued high level of knowledge, with 61% of respondents identifying 'grazing' as the most appropriate management technique.



16. DEMOGRAPHIC PROFILE OF VISITORS

16.1 The Sample

A total of 1,328 parties of visitors provided demographic data for their group. The average (mean) number of people per group was approximately 2.5, giving a total of 3,353 people included in the survey sample. Figure 16.1 and table 16.1 indicate the type of group structure of visitors to the AONB.

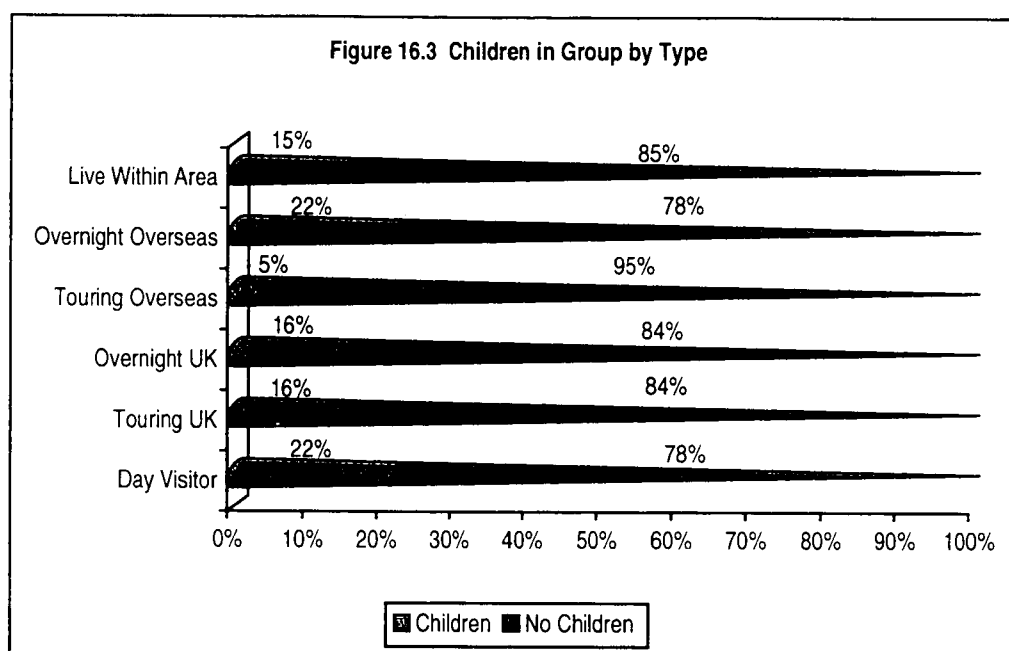


The vast majority of visitors to the AONB (81%) were adults, either visiting alone (31%), as a couple (39%) or in a group (11%). Much further behind were families, representing only 19% of all visitors. However, the label 'family' includes all visitor groups with at least one adult and one child under the age of 16. This category could therefore include school / youth groups as well as 'bona fide' family parties, although these are not distinguishable from the questionnaire survey. The large percentage of 'solo' visitors are predominately day visitors (49%) or local residents (37%) and over two thirds (69%) are 'walking' in the AONB.

	Day Visitor	Touring UK	Overnight UK	Touring Overseas	Overnight Overseas	Live Within Area
Male Only	18%	7%	7%	36%	22%	31%
Female Only	11%	8%	5%	5%	11%	26%
Male with Children	3%	1%	1%	-	-	5%
Female with Children	3%	2%	2%	5%	-	4%
Family	16%	13%	13%	-	22%	7%
Couple	37%	53%	59%	41%	33%	24%
Group	12%	15%	13%	14%	11%	3%

16.2 The Family Market

As the survey was carried out over 12 months, and included interviewing on weekends / weekdays, school holidays and in term time, there was no bias towards or against the presence of children. However, as indicated in figure 16.3, the proportion of groups with children, amongst all market segments, was low.



Of all the groups surveyed, less than one fifth (19%) contained children under 16 years of age. The majority (81%) of parties did not contain young children. The greatest proportion of groups with children can be seen amongst the overseas overnight and day visitor markets, where 22% of groups contained children. The lowest levels were amongst overseas touring visitors, where only 5% of groups included children.

16.3 Solo Visitors

Almost one third (30%) of visitors surveyed were on their own, with slightly more single males (18%) than females (12%). This type of visitor was most predominant amongst those respondents living locally (57%), day visitors (29%), and, perhaps surprisingly, overseas overnight visitors (33%).

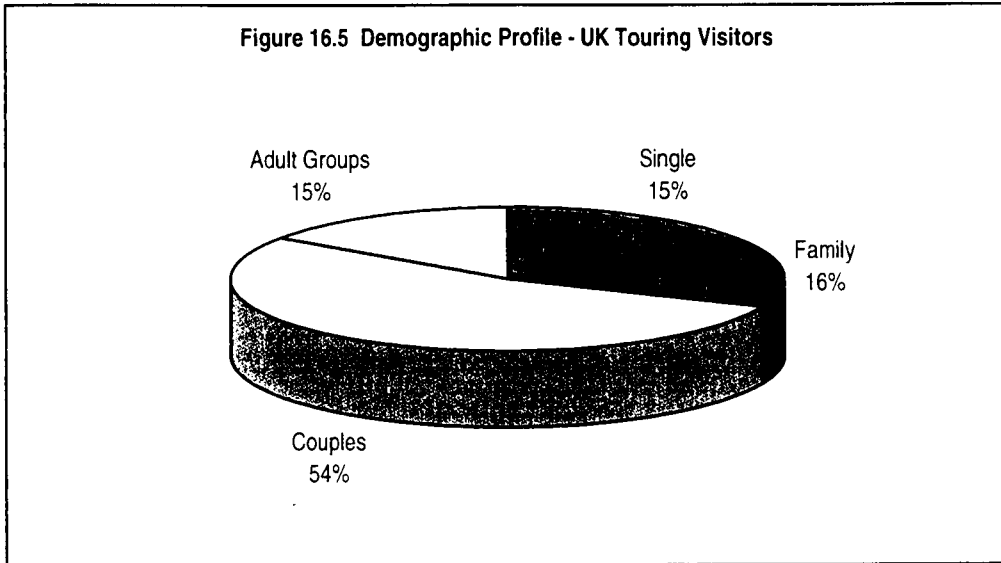
16.4 Adult Parties

When combined, adult couples and adult groups account for 50% of all visitors. Adult couples are most predominant in the domestic market representing 59% of overnight visitors and 53% of touring visitors. The highest concentration of adult groups is seen in the domestic touring market (15%).

This analysis of group structure indicates that the Malvern Hills AONB has a particularly high attraction for adult couples and solo visitors, with the family market of relatively lesser value.

16.6 UK Touring Visitors

A total of 141 groups of touring (UK) visitors provided demographic data for analysis. The total number of people in these groups was 359, giving an average (mean) of 2.5 people per group. Figure 16.5 and table 16.4 indicate the structure of these groups.



	Male	Female	Total
65+	10%	8%	18%
55-64	11%	7%	17%
45-54	11%	12%	24%
35-44	8%	7%	15%
25-34	4%	7%	11%
15-24	2%	3%	5%
0-14	4%	7%	11%
TOTAL	50%	51%	101%

16.8 Overseas Touring Visitors

A total of 22 groups of day visitors provided demographic data for analysis. The total number of people in these groups was 44, giving an average (mean) of 2 people per group. Figure 16.7 and table 16.6 indicate the structure of these groups.

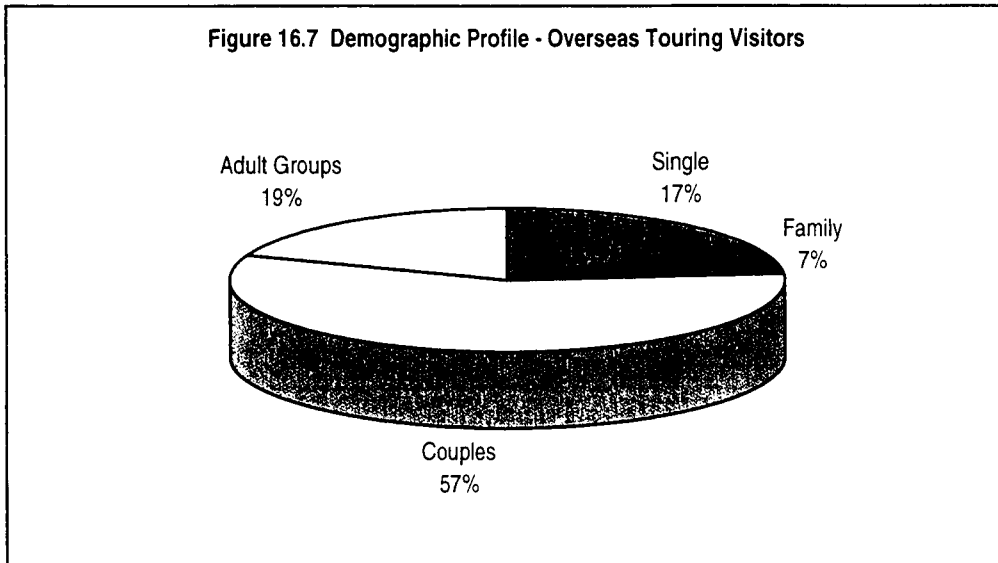
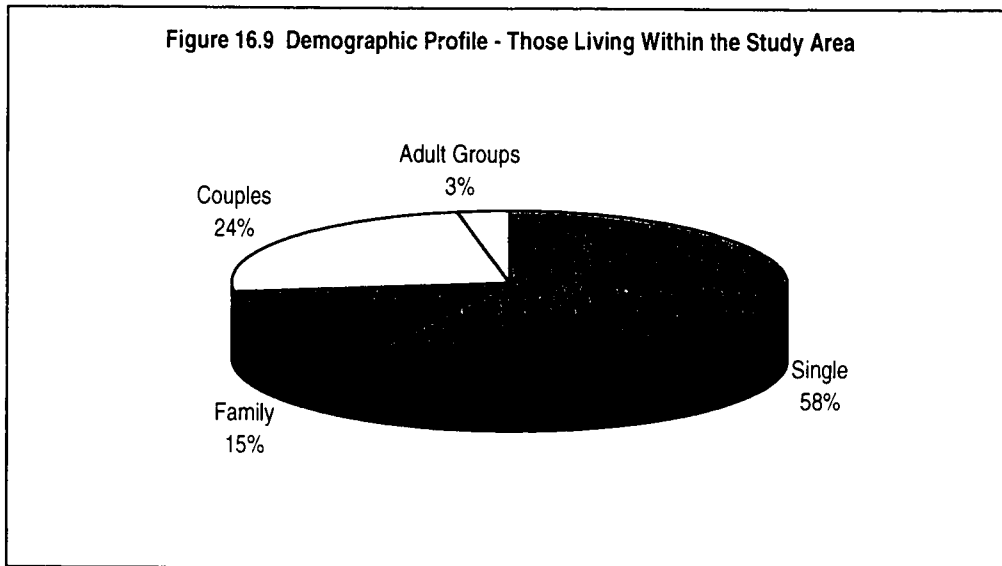


Table 16.6 Demographic Profile – Overseas Touring Visitors

	Male	Female	Total
65+	7%	2%	10%
55-64	17%	12%	29%
45-54	12%	7%	20%
35-44	7%	10%	17%
25-34	7%	7%	15%
15-24	2%	2%	5%
0-14	2%	2%	5%
TOTAL	54%	42%	100%

16.10 Local Residents

A total of 267 groups of local people, i.e. those living within the AONB, Great Malvern or Ledbury, provided demographic data. The total number of people in these groups was 523 giving an average (mean) of 1.9 people per group. Figure 16.9 and table 16.8 indicate the structure of these groups.



	Male	Female	Total
65+	13%	8%	21%
55-64	8%	9%	17%
45-54	9%	9%	18%
35-44	7%	7%	14%
25-34	7%	5%	12%
15-24	2%	3%	5%
0-14	7%	5%	12%
TOTAL	53%	46	99%

18. EXPENDITURE

18.1 Visitor Spend in the Local Economy

Visitors were asked to estimate how much they and their party were likely to spend during the whole period of their stay in the AONB. This included expenditure incurred on behalf of others, i.e. friends/relatives, business colleagues. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as **estimates**. Studies using the diary method of keeping account of spending have shown that visitor's own estimates as used in the AONB survey are usually on the conservative side.

Visitors were asked to give a breakdown of their total expenditure according to the following categories:

- * Accommodation
- * Eating/drinking out
- * Shopping for food
- * Shopping other goods
- * Entertainment
- * Transport/fuel
- * Other

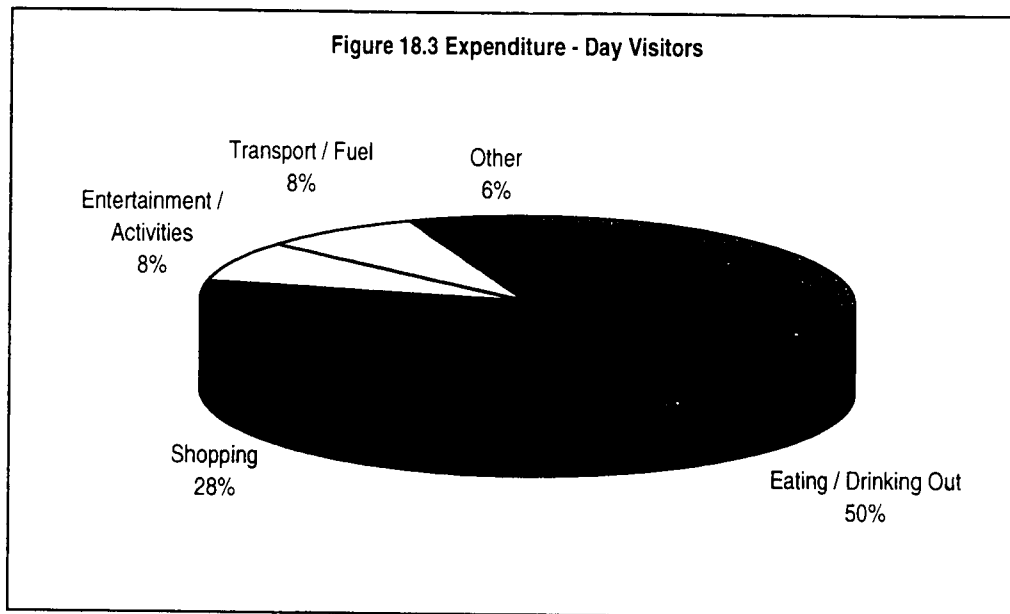
The information on visitor expenditure in the local economy can be used as an indicator of the economic impact of all the visitors. Table 18.1 and figure 18.1 indicate the breakdown of all visitor segments' expenditure by sector:

Accommodation	37%
Eating/drinking out	31%
Shopping	17%
Entertainment	5%
Transport/fuel	7%
Other	3%

A comparison of expenditure with other local areas (figure 18.2) indicates a proportionately lower spend on accommodation and entertainment in the AONB.

18.2 Day Visitors

On average, a party of day visitors in the AONB spent £11.74. With an average party size of 2.7, the average expenditure rate per person, per day is £4.35.



Accommodation	0%
Eating/drinking out	51%
Shopping	28%
Entertainment	8%
Transport/fuel	8%
Other	6%

The 1996 UK Day Visits Survey shows an average expenditure per person for all types of day trip. For day trips to the countryside, the average spend per head is £12.30. The level of spend across the Malvern Hills AONB is below this national average figure, perhaps reflecting the limited spending opportunities available.

18.4 UK Overnight Visitors

The estimated spend for all UK overnight visitors is calculated to be £179.46 per party. An average trip lasted 4.3 nights and the average group consisted of 2.8 people. The spend per person for UK overnight visitors to the AONB is therefore £64.09, with an average spend per person per night of £16.02.

In the serviced accommodation sector, the average stay was 2.4 nights, with an average party size of 2.4 people. Total party spend per trip was £231.92, or £40.26 per person, per night.

In the commercial self-catering sector, the average stay was 5 nights and the average party size 3.3 people. Total party spend per trip was £308.95, or £19.11 per person, per night.

For those visitors using caravan / camping accommodation, the average length of stay was 5 nights and the average party size 3 people. Total party spend was £126 or £8.13 per person per night.

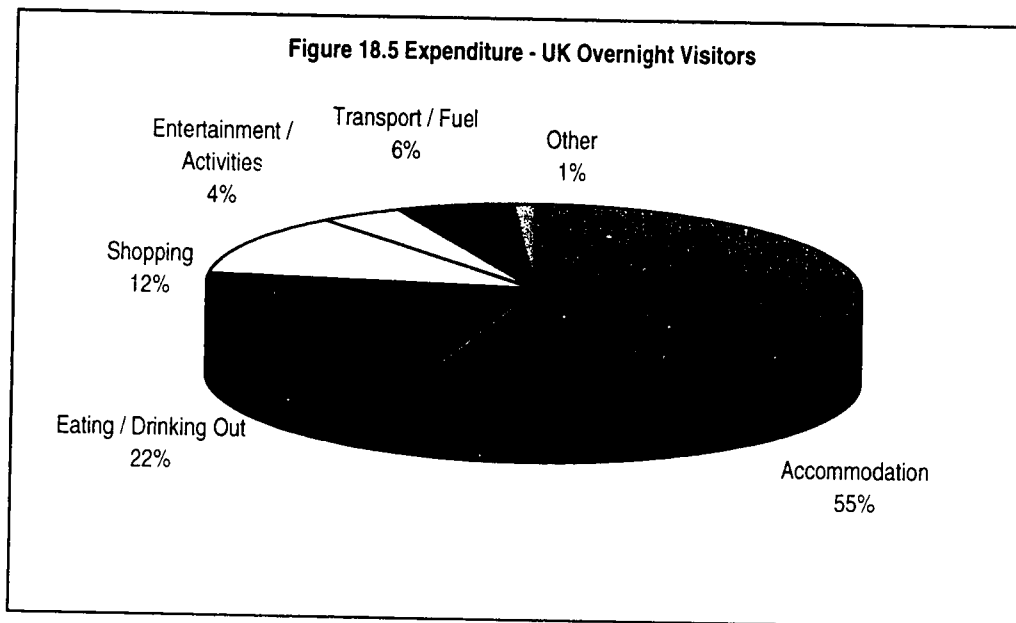


Table 18.4 Expenditure Breakdown – UK Overnight Visitors

Accommodation	55%
Eating/drinking out	22%
Shopping	12%
Entertainment	4%
Transport/fuel	6%
Other	1%

18.6 Overseas Overnight Visitors

The sample of overseas overnight visitors providing spend data, is not of a sufficiently reliable size to derive any spend estimates for this market segment.

18.7 Expenditure by Market Segment

In summary, the differing levels of spend per market segment are:

Table 18.6		Average Daily Expenditure
UK Day Visitor		£4.35 per person, per day
UK Touring		£17.93 per person, per day
UK Overnight – All		£16.02 per person, per night
UK Overnight – serviced		£40.26 per person, per night
UK Overnight – self-catering		£19.11 per person, per night
UK Overnight – caravan / camping		£8.13 per person, per night
UK Overnight – VFR		£9.08 per person, per night
Overseas Touring		£16.39 per person, per day

Appendix 1

Questionnaire and Maps

MALVERN HILLS AONB USER SURVEY 1999-2000

Interview Location

Interviewer.....

Date/...../.....

Time.....

Number of refusals before a full interview

"Good morning / afternoon. I am carrying out a user survey on behalf of the Heart of England Tourist Board, looking at how visitors and residents use the Malvern Hills area. Could I take 10-15 minutes of your time to ask a few questions?" Thank you.

INTERVIEWS IN MALVERN / LEDBURY ONLY

Are you spending any leisure time today or as part of a current leisure break within the area ringed on this map? (show map)
 YES 1 NO 2
 If NO, then thank and close. If YES, continue.

Q1 Can you tell me where you normally live?

Town/ Village.....

County/ Country.....

Postcode.....

"This survey is about how residents and visitors use the area that is shown on the map, known as the Malvern Hills AONB, covering an area larger than just the actual Malvern Hills, including the surrounding commons. All the following questions relate to the AONB map area and the immediate surroundings."

Q6a If yes, how many nights will this be?

NIGHTS

Q2 Why did you choose to come TO THIS AREA TODAY:

(show card - tick as many as respond)

- Participate in outdoor activities 1
- Walking 2
- General countryside visit/sightsee/view 3
- To meet friends / family 4
- Recommendation from others 5
- New place to come to / not been before 6
- Variety of things to see and do 7
- Easy to get to / close by 8
- Peace and quiet 9
- Just passing through A
- Enjoyed a previous visit/ been before B
- Visit attraction / location C
- Visit event D
- Refreshments E
- Educational visit F
- Other (please specify) G

Q6b Where will you be staying?

Town / village:

Q4 Have you ever been into the AONB area ringed on the map before? If yes, was it for a day visit or overnight? Or do you live within the ringed area? **(Show map 1 of AONB)**

- NO Never been before 1
(go to Q5)
- YES Previous visit was for:
(multiple response)
- DAY VISIT 2
- OVERNIGHT 3
- LIVE WITHIN AREA 4
(go to Q8)

Q6c In what form of accommodation?

- Hotel / Motel 1
- Guesthouse / B&B 2
- Self-catering (not farm / pub) 3
- Pub B&B 4
- Pub S/Catering 5
- Farm B&B 6
- Farm S/Catering 7
- Camping/caravan 8
- With friends/relatives 9
- Youth hostel A
- Other (please specify) B

Q3 Have you heard of the term 'AONB' or 'Area of Outstanding Natural Beauty' before?

- YES 1
- NO 2
- DON'T KNOW / NOT SURE 3

Q4a For what reasons did you visit?

.....

Q4b Including today, how many times have you visited the M H AONB in the past 12 months?

.....

Q5 On this trip as a whole, including those already taken and those to come, how many nights will you spend AWAY FROM HOME?

.....NIGHTS
(if nil go to Q7)

Q7. What time did you arrive in the area ringed on the map and start your day's visit?
 About what time will you finish your visit and depart?

ARRIVAL TIME

DEPARTURE TIME

Interviewer to work out total time to within half hour

Q6 On this trip, do your plans include an OVERNIGHT stay in the ringed area on the map?

- NO 1
- YES 2

Q8a What single MAIN type of transport did you use to travel to the AONB?(tick column a)

Q8b What forms of transport have you used to travel around once you are here? (tick column b)

	a travel to (tick one)	b travel within (multiple)
Car 1
Van / mini bus 2
Motorcycle 3
Train 4
Public bus 5
Hills Hopper bus 6
Tour coach 7
Bicycle 8
Camper van/ Caravanette 9
Walked A
Other (please specify) B

(If 1,2 or 3, ask Q9, if 4 onwards go to Q10)

Q9 Can you give me any reasons for not using public transport?

- No knowledge of options 1
- Not convenient / flexible enough 2
- It is not available for this trip 3
- Other (please specify) 4
-

Q10 If you had not come to the Malvern Hills AONB for this trip, where else were you considering?

.....

Q11a Looking at the following map please can you tell me via which route / road you first arrived into the AONB? (**Show map 1**) (indicate route & direction i.e. A449S, A449N)

.....

Q11b Which roads, if any, did you use to travel around the AONB today? (**Show map 2**)

.....

Q11c Which is the most likely route via which you will depart the AONB? (**Show map 1**) (indicate route & direction i.e. A449S, A449N)

.....

Q12 Whilst in the AONB and immediate area, what ACTIVITIES have you been involved in?

(**Show card**)

- Pub / restaurant / café (town) 1
- Pub / restaurant / café (countryside) 2
- Shopping (town) 3
- Shopping (outside Malvern/Ledbury) 4
- Touring around 5
- Visit villages / market towns 6
- Visit attractions 7
- Visit events / festivals 8
- Walking up to 1 hour 9
- Walking over 1 hour A
- Cycling – on road B
- Mountain biking – off road C
- Sit in / near vehicle/admire view D
- Picnicking E
- Active sports / pursuits F
- Play ball games G
- Watch birds / animals H
- Organised non-sport activity I
- Music / arts / theatre J
- Other (please specify) K
-

Q13a Looking at the map can you tell me in which sector you have used, or expect to use today, footpaths or trails?(**Show map 2**)

.....

Q13b If C, E or G, in which other sectors have you, or do you expect to, walk? (**Show map 2 insert**).....

Q14 How well do you think the AONB's footpaths are signed / waymarked?

- Very badly 1
- Not too well 2
- Okay 3
- Quite well 4
- Excellent 5
- Don't know 6

Q15a Have you ever heard of the Worcestershire Way?

- YES 1
- NO 2

Q15b Have you ever walked any of the Worcestershire Way?

- YES 1
- NO 2
- DON'T KNOW 3

Q16 When did you decide to make this visit to the Malvern Hills AONB?

- Today 1
- Yesterday 2
- Within last week 3
- Within last month 4
- Within last 1-3 months 5
- Within last 3-6 months 6
- Longer 7

Q17 In planning this trip, did you use any sources of information? (**Show card**)

- NO did not seek any information 1
- YES Always known about the area 2
- Personal recommendation 3
- Newspaper / magazine 4
- Guide books 5
- Tourism leaflets/brochures 6
- Maps 7
- Internet 8
- Other (please specify) 9
-

Q18a Are you a member of any environmental or heritage organisations?

- YES 1
- NO 2

Q18b If yes, please name them

.....

Q19a Having arrived in the AONB, have you used/do you intend to use any sources of information? (**Show card**)

- NO 1
- YES Tourist Information Centre 2
- Advice at accommodation 3
- Info racks at accommodation 4
- Tourist Information Boards 5
- Info racks at attractions 6
- Walking guides/maps (specify)..... 7
- Other (please specify) 8
-

Q19b Can you tell me what other types of local information would help you to get more out of your visit to the Malvern Hills AONB?

.....

Q20a How aware are you that the grassland on the Malvern ridge and commons is important for nature conservation?

- Very aware 1
- A little aware 2
- Not aware 3
- Don't know 4

Q20b What do you think is the best form of management to maintain the wildlife value of the grassland?

- Mowing 1
- Grazing 2
- Leaving it alone 3
- Don't Know 4

Q21 Apart from here, what other local areas have you visited/do you intend to visit during this visit? (**Show card**)

- Great Malvern 1
 - Malvern Wells 2
 - Ledbury 3
 - British Camp / Herefordshire Beacon/ Southern Hills 4
 - Worcestershire Beacon / Northern Hills 5
 - St Ann's Well 6
 - Castlemorton / Welland 7
 - Eastnor / Castle 8
 - Colwall 9
 - West Malvern A
 - The Commons B
 - Other (please specify) C
-

Q22 If you have noticed or used any of the following local facilities please indicate your degree of satisfaction using a scale of 1 (very poor), 2 (poor), 3 (no strong opinion), 4 (good), 5 (very good). (**Show card**)

- Litter clearance 1
- Parking availability generally 2
- Traffic conditions 3
- Signposting (roads) 4
- Footpath quality / management 5
- Local public transport 6
- Public toilets 7
- Picnic sites 8
- Interpretation / countryside / visitor Information / boards / leaflets 9

Q23a What do you particularly like about the Malvern Hills AONB area?

.....

Q23b On a scale from 1 (very quiet) to 5 (very busy), how would you rate the overall volume of people, cars and coaches today in the area?

.....

Q23c On the same 1 to 5 scale how has the number of people affected your satisfaction with this visit?

- Very dissatisfied 1
- A little dissatisfied 2
- No real view 3
- Satisfied 4
- Very satisfied 5

Q24 What, if anything, spoilt your visit to the AONB?

.....

Q25a Including yourself, how many in your party are male/female and looking at the card provided, in what age groups are they: (**Show card**)

AGE	Male	Female
Group 1 0 - 14		
Group 2 15 - 24		
Group 3 25 - 34		
Group 4 35 - 44		
Group 5 45 - 54		
Group 6 55 - 64		
Group 7 65+		

Q25b Gender of respondent (observe)

M F

Q26 Can I ask you the occupation of the chief wage earner in your family and also ask you to indicate which of the groupings shown on the card best relate to him / her? (please circle answer)

Occupation:

AB C1 C2 DE

Q27 Can you say about how much you and your party are likely to spend during the whole period of this visit in the Malvern Hills area (including Malvern and Ledbury)?

Please include any spending you may incur on behalf of others e.g. taking out friends/relatives who may be providing accommodation. (**Show card**)

£ £ £ £

Accommodation				
Eating & drinking out				
Shopping				
Entertainment / activities / tickets				
Transport / fuel / parking in the area				
Other				
TOTAL				

Thank you very much for your time.

MAP 1

	M50 East	1
	M50 West	2
	A417 Gloucester	3
	A417 Ledbury	17
	A449 Ledbury	4
	A449 Worcester	5
	A438 Tewkesbury	6
	A438 Hereford	7
	B4208 South	8
	B4208 Gt Malvern	9
	A4104 Pershore	A
	A4104 Lt. Malvern	18
	B4209 East	B
	B4209 West	19
	A4103 Worcester	C
	A4103 Hereford	D
	A44 Worcester	E
	A44 Leominster	F
	Rail	G

Hereford

Ledbury

A417

Eastnor

Bromesberrow

Gloucester

Wellington Heath

A438

Cradley

Mathon

Coddington

Colwall

Little Malvern

Hollybush

M50

Alfrick

Suckley

Storrige

Gt. Malvern

Malvern Wells

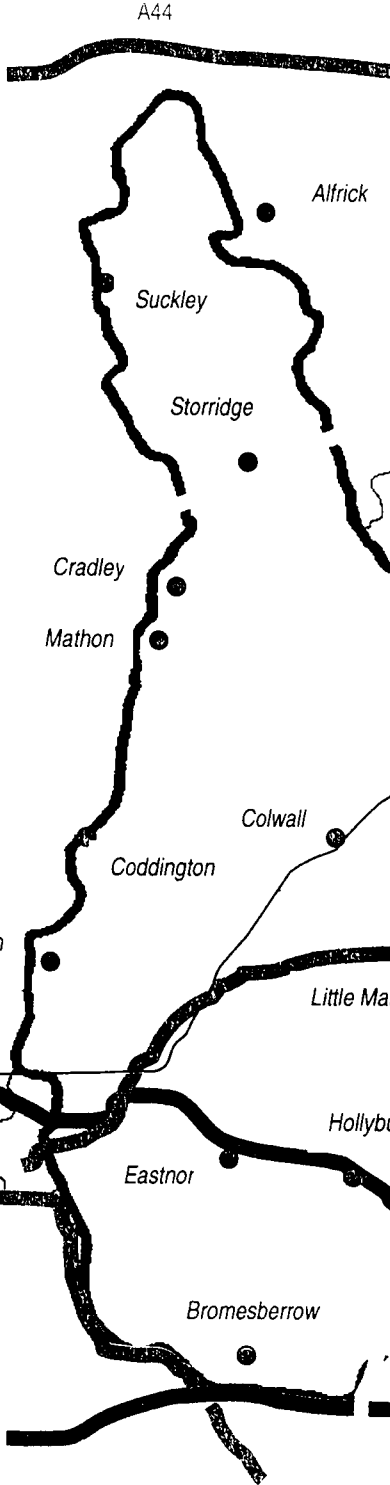
A4104

Pershore

Worcester

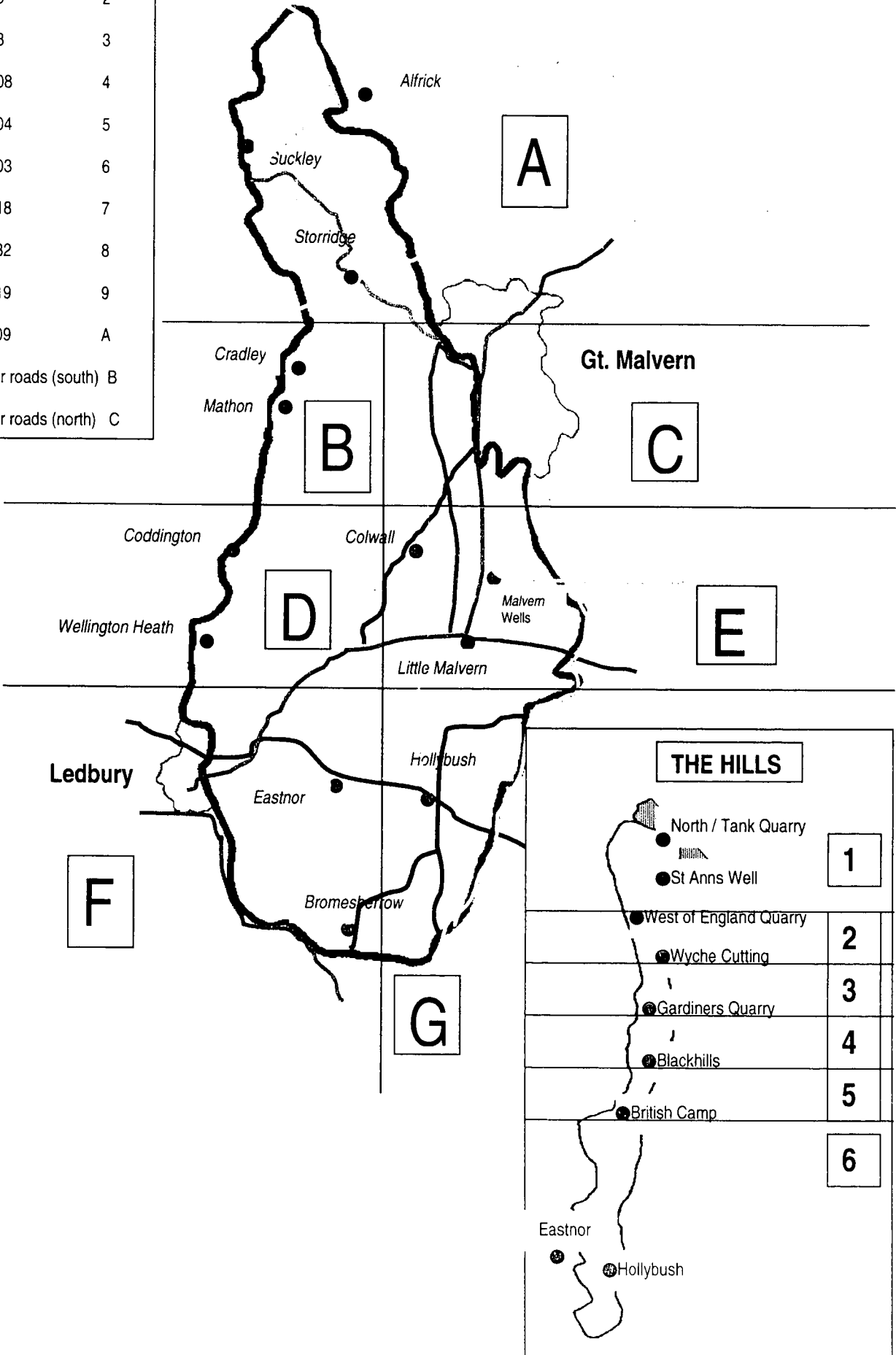
Tewkesbury

A449



MAP 2

	A417	1
	A449	2
	A438	3
	B4208	4
	A4104	5
	A4103	6
	B4218	7
	B4232	8
	B4219	9
	B4209	A
	Minor roads (south)	B
	Minor roads (north)	C



Appendix 2

Regional Tourist Board Areas

England's Ten Regional Tourist Boards

