

Malvern Hills & Commons

Visitor Survey 2018

FINAL REPORT

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Malvern Hills Trust

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Contents	PAGE
EXECUTIVE SUMMARY	<i>i-vi</i>
1.0 INTRODUCTION, BRIEF & METHODOLOGY	
1.1 Introduction	1
1.2 Objectives of the Survey	1
1.3 Survey Methodology	1
1.4 Statistical Reliability	2
1.5 Notes to the reader	2
1.6 Location of Interviews	3
1.7 Month of Interview	4
1.8 Time of Interview	6
2.0 TYPE OF VISITOR	
2.1 Different visitor types	7
3.0 VISITOR ORIGINS	
3.1 Categorising the visitor	8
3.2 Origin of day visitors	9
3.3 Origin of overnight visitors	10
3.4 Resident/Non-Resident	11
4.0 TYPE OF VISIT	
4.1 Best describes visit	13
5.0 REASON FOR VISIT	14
5.1 Primary reason for visit	14
5.2 Secondary reason for visit	17
6.0 DEMOGRAPHIC PROFILE OF VISITORS	
6.1 Party Size	21
6.2 Party composition	21
6.3 Age profile	23
6.4 The family market	24
7.0 SOCIO ECONOMIC GROUPINGS	
7.1 Chief income earner	26

8.0	NEW/REPEAT VISITORS	
8.1	<i>Segment variation</i>	29
8.2	<i>New/Repeat Visitors by Location</i>	30
8.3	<i>Primary activity on visit and total visit in past 12 months</i>	30
9.0	LENGTH OF STAY	
9.1	<i>Length of stay in area</i>	33
10.0	MODE OF TRANSPORT	
10.1	<i>Car is dominant mode of transport</i>	34
11.0	MAINTENANCE OF LAND	
11.1	<i>Responsibility of Land Management</i>	36
11.2	<i>Organisation Name</i>	37
11.3	<i>Terms that apply to protect area</i>	38
12.0	SOURCES OF INFORMATION USED	
12.1	<i>Pre-trip planning sources of information</i>	41
12.2	<i>Information usage in area</i>	43
13.0	SATISFACTION LEVELS	
13.1	<i>Satisfaction scores of facilities</i>	45
13.2	<i>Overall enjoyment of visit</i>	46
12.3	<i>Likelihood of visiting again</i>	47
12.4	<i>Exercise levels</i>	48
14.0	LIKESPOILT VISIT TO AREA	
13.1	<i>Like about area</i>	51
13.2	<i>Spoilt visit to area</i>	52

Appendices

Executive Summary

The Research Solution was commissioned by Malvern Hills AONB Partnership and The Malvern Trust to carry out a visitor survey across the Malvern Hills and Commons during late summer and early autumn 2018. A questionnaire was devised in consultation with the client based on surveys previously undertaken in the area. Five sites were used: British Camp, Worcestershire Beacon, Hollybush, Swinyards Car Park and North Quarry Car Park. A sample of 400 interviews had been agreed with a final total of 426 interviews completed over the five locations.

This research will help the Partnership and the Trust to better understand the nature of the different visitor markets across the Malvern Hills and Commons; why they come, what they do whilst in the area and their satisfaction with what the area has to offer.

In consultation with the client, a questionnaire based on previous visitor surveys undertaken in the area was agreed and used throughout the survey period. (see Appendix 1).

Type of visitor

Over eight out of ten (**81%**) visitors to the area, are on a day visit (or part day/local visit) with the remaining **19%** staying overnight in the Malvern Hills and Commons area.

Origin of visitor

The majority of visitors during the interviewing period came from Worcestershire, with almost half (49%) originating from the county. The next nearest supplier of visitors was from the West Midlands, 10% followed by 8% from the neighbouring counties of Herefordshire and Gloucestershire (7%).

The catchment area for the day trip sector has a strong core from within the parent county of Worcestershire (60%) and the neighbouring counties of Herefordshire and the West Midlands (10% respectively), followed by Gloucestershire (8%).

Visitors from the South-East region of the country supply the largest share of domestic overnight visitors to the area (12%). The main overnight market is drawn from a diverse base, from South to North and East to West. A third (33%) of all visitors to the Malvern Hills and Commons came from within a 3-mile radius and were classified as a resident. The majority were non-residents who came from the parent county of Worcestershire and nearby Herefordshire with those who came from further afield.

Type of Visit

Respondents were asked what best described their visit on the day of interview. Overall, six out of ten respondents (60%) of visitors were on a local day trip from home. A much smaller number of visitors were on a holiday or short break staying in the area (19%), followed by 18% who were on a day visit from home outside of the area. Only 3% had cited a day visit whilst on holiday elsewhere.

Main Reason for Visit

Almost six out of ten (59%) stated their primary reason was for walking, with 25% taking their dog for a walk, accounting in total for 84% of responses. Much smaller numbers noted; general countryside visit (5%) and to enjoy the view and mountain biking – 2% respectively.

Walking the hills and commons was the top response for respondents interviewed at Worcestershire Beacon (75%) compared with just over a third (36%) who were interviewed at North Quarry Car Park. Walking the dog on the Worcestershire Beacon was considerably lower (13%) than those respondents at Hollybush and North Quarry Car Park (34% and 33% respectively).

Party composition

A total of 426 parties of visitors were surveyed. All respondents provided demographic data on their group. The average (mean) number of people per group was approximately 2.4 giving a total of at least 1,007 people included in the survey sample.

Across all visitors, travelling as a couple was the top response (28%), closely followed by visiting with family (27%). Travelling as a group with friends and family was the lowest response noted by 5% of visitors.

Age profile of visitors

Overall, 51% of party members were male, 49% female. The largest age group recorded was the group aged 45-54 years (20%), followed by 35-44 and those aged 55-64 years, both 17%. Very few visitors to the area were in the oldest age category of 75+ (1%).

Overall, a quarter (25%) of groups contained children under the age of 18; and not necessarily all as families, there may also be friendship groups or social club-based groups; 75% did not have minors within their group.

Chief income earner

Generally, most visitors were employed on a full-time basis with 58% in full time employment. Just 4% were in part time employment and a further 10% self-employed. Just over a fifth (21%) were retired with company/private pension compared with only 1% who were retired on a state pension only.

New/repeat visitors

Over eight out of ten respondents, (85%) are repeat visitors, with 15% or one in six being first time visitors. This is however not surprising with a high proportion of visitors originating from within Worcestershire itself. The proximity of the hills and commons to many repeat visitors lends itself to multiple visits.

Day visitors on a local trip from home are high repeat markets (97% repeat, 3% new), whilst visitors staying overnight in the area saw an even split of both new and returning visitors. All residents had made a previous visit, as did 78% of non-residents. The highest number of repeat visitors were found at North Quarry Car Park (93%) and Swinyards Car Park (88%). Both Hollybush and British Camp saw less frequent visitors than the other sites (19% and 20% respectively).

Primary Activity/Visits Over Past 12 Months

There was very little difference in the number of times respondents had visited in the past 12 months to participate in a similar activity on the day of interview compared with the total number of times they had visited the area in the past 12 months. Only Annual visits and “other” differed but this was only by a small number. Of those that gave “other” as a response, the majority had not made any visits in the past 12 months. Residents and day visitors on a local trip from home made the greatest number of daily and weekly visits over the past 12 months for the purpose of the primary activity on the day on interview, more than all other types of visitor. This was the same for the total number of visits in the last 12 months.

Length of stay

The average length of stay was approximately **2 hours 23 minutes** which included all visitors at all locations. Table 9.1 shows the variation in time spent in the area by visitor type and location.

Visitors on a holiday or short break staying in the area spent more time in Malvern Hills and Commons than any other visitor – 3 hours 1 minute. Non-residents and new visitors were also more likely to spend slightly longer, 2 hours 54 minutes, and 2 hours 46 minutes, compared with residents of Malvern Hills and Commons (1 hour 18 minutes) and repeat visitors, 2 hours 19 minutes.

The length of time visitors stayed on the Malvern Hills and Commons varied by location. The longest period spent was at Hollybush, 3 hours and 12 minutes compared with only 1 hour and 23 minutes at North Quarry Car Park.

Mode of Transport

In the majority of visitor surveys, the car is the most dominant form of transport used to arrive at a destination. Almost all (86%) of visitors arrived by car, which is significantly above the England average of 61% (Great Britain Day Visits Survey, GBDVS 2017). It should be noted that this is based on all transport across England and not specifically to a rural destination such as Malvern Hills and Commons.

The next significant mode of transport was walking (8%) noted by visitors. Only a handful of visitors (2% combined) used forms of public transport as their main mode of transport to the area. However, the rural nature of the area and access to car parking may be a factor in the number of cars used to arrive in the area.

Maintenance of Land

There was a fairly high awareness, with six out of ten (60%) of respondents aware of who was responsible for the land maintenance. Residents (79%), day visitors on a local trip from home (71%) and those who had previously visited (67%) had the greatest awareness across all types of visitors. The high levels of awareness amongst these visitors is more evident due to the proximity of living near to the area and in many cases visiting on multiple occasions.

First-time visitors to Malvern Hills and Commons had the least knowledge of who was responsible for maintaining the land with only a quarter (24%) aware of the organisation.

Responsible for Management

The 60% who were aware of the organisation responsible for maintaining the land were then asked if they could name the relevant organisation. Over eight out of ten respondents (84%) cited the Malvern Hills Trust/Conservators, followed by much smaller numbers who mentioned the District/County Council (12%), National Trust (3%) and Eastnor Castle (2%). 4% responded that they didn't know or couldn't remember with 1 respondent each, naming: charitable trust, some conservationists and different conservation trusts.

To help understand the awareness of the area, respondents were then asked if they were also aware of any particular designations or terms that apply to this area or parts of the area to help protect it and could they name any that came to mind.

Almost three quarters (72%) responded with "no/don't know". The most notable term mentioned was AONB (15%), followed by Conservation Trust (8%). No fires/BBQ's, take home dog litter/pick up dog litter, Malvern

Council and take home litter, (1% respectively). Restriction on cyclists, no parking, common law land, Geo Park, Home Office, keep to paths, Site of Scientific Interest, to be respectful of countryside, to be respectful of the environment and certain times you can use it were each mentioned by 1 respondent each.

Sources of information

Overall, just under two thirds had not used any information in planning their trip. Previous knowledge was the top response by those visitors who gave a response to the type of information used, followed by walking guides maps (10%) and the Internet (9%).

Respondents were then asked if they had accessed any forms of information whilst in the area. Overall, the majority (78%) of visitors indicated that they had not accessed any sources of information, only 22% had.

Satisfactions Scores

Overall, there were positive satisfaction ratings given by visitors to the area. The highest (mean) score was given for the management of the countryside (habitats/landscapes), 4.72 with 98% rating it good/very good. The lowest scores recorded were for public toilets (3.28) and picnic sites (3.78).

Satisfaction Scores						
	Mean Score	Very Good	Good	Neither	Poor	Very Poor
Litter clearance	4.51	55%	42%	3%	0%	-
Parking availability generally	4.55	62%	33%	4%	1%	0%
Traffic conditions	4.56	61%	34%	4%	0%	-
Signposting (roads)	4.19	44%	34%	18%	3%	0%
Footpath quality/management	4.63	66%	32%	1%	1%	-
Management of the countryside (habitats/landscapes)	4.72	75%	23%	1%	0%	0%
Public toilets	3.28	27%	23%	22%	15%	13%
Picnic sites	3.78	32%	32%	20%	14%	2%
Interpretation/countryside/visitor information/boards/leaflets	4.12	41%	35%	2%	4%	-
	Mean Score	Very Quiet	Quiet	Average	Busy	Very Busy
Overall volume of people, cars and coaches today in the area	3.67	24%	33%	29%	14%	-
	Mean Score	Very Satisfied	Satisfied	No Real View	A little Dissatisfied	Very Dissatisfied
How has the number of people and traffic affected your satisfaction with this visit?	4.11	42%	27%	30%	1%	-

Overall enjoyment of visit to the area

All visitors indicated their overall enjoyment of their visit to Malvern Hills and Commons. The overall mean score of 4.81 out of 5.0 indicates a high level of enjoyment. Eight out of ten (81%) felt it was ‘very high’ with a further 18% noting it to be ‘high’; combined a 99% positive rating. Less than 1% gave an average rating and no one gave a negative low level of enjoyment.

Likely to visit again?

The majority of visitors would make a return visit to Malvern Hills & Commons with 98% “very likely/quite likely” to return. The high level of satisfaction along with 85% of respondents who have visited before, may contribute to the high scores given.

Use of Malvern Hills & Commons for Exercise

Respondents were asked would they exercise as much if the Malvern Hills & Commons were not there and if not how much less they estimated they would exercise. Almost half (48%) would exercise between 10 and 20% less if the Malvern Hills and Commons were not there for them to take part in exercise, a fairly significant proportion of visitors. Much smaller numbers indicated they would exercise less ranging from 3% who would exercise between 61-70% less and 71-80% and 81-90% who stated they would exercise less by 1% respectively.

Like about Malvern Hills & Commons

For over half of visitors (48%), the beautiful/pretty/great views was their top comment, followed by walking and exercise (24%) and quiet/peaceful/tranquil nature of the area and how picturesque/scenic it was (19% each

Spoilt Visit to Area

Very few visitors had negative comments to make about their visit, with 87% stating that nothing had spoilt their visit to Malvern Hills and Commons. The small number who did have issues during their visit cited loose dogs not on leads, more dog litter bins and people who left behind dog litter, 5% of respondents. Other comments included; weather, cost of parking and only takes cash, litter, mountain bikers/cyclists inconsiderate and signposting.

1.0 INTRODUCTION, BRIEF & METHODOLOGY

1.1 Introduction

The Research Solution was commissioned by Malvern Hills AONB Partnership and The Malvern Trust to carry out a visitor survey across the Malvern Hills and Commons during late summer and early autumn 2018. A questionnaire was devised in consultation with the client based on surveys previously undertaken in the area. Five sites were used: British Camp, Worcestershire Beacon, Hollybush, Swinyards Car Park and North Quarry Car Park. A sample of 400 interviews had been agreed with a final total of 426 interviews completed over the five locations.

This research will help the Partnership and the Trust to better understand the nature of the different visitor markets across the Malvern Hills and Commons; why they come, what they do whilst in the area and their satisfaction with what the area has to offer.

In consultation with the client, a questionnaire based on previous visitor surveys undertaken in the area was agreed and used throughout the survey period.

1.2 Objectives of the Survey

The key elements required from the survey were as follows:

- To obtain a knowledge base of current visitors to the Malvern Hills and Commons
- To establish the structure and pattern of visitation to the area
- To gain a detailed understanding of visitor motivations, information use, awareness and opinions of visitors to those visiting the area

1.3 Survey Methodology

A questionnaire was designed for use during the survey period. A quota was assigned to each local identified by the client partners, The Malvern Trust and the Malvern Hills AONB (Area of Outstanding Natural Beauty) Partnership in order that a reasonable spread of locations and types of visitor would be secured. The surveys were undertaken during the period late July through to the mid-September 2018.

The surveys were completed by trained market researchers, approaching the next person to pass by, over a period of weekdays and weekends, in term time and school holidays. Local residents of the area were included in the research as they play a huge part in the use of the hills for leisure and exercise activities.

1.4 Statistical Reliability

All sample surveys are subject to statistical error that varies with the sample size and the order of magnitude of the research findings being considered. This survey obtained a sample of 426 and the margins within which one can be 95% certain that the true figures in this report will lie are presented below.

Table 1.1: Statistical Error	
Findings from survey	95% confidence interval
50%	+/- 6.9%
40/60%	+/- 6.8%
30/70%	+/- 6.4%
20/80%	+/- 5.5%
10/90%	+/- 4.2%

This means, for example, we can be 95% certain that if 20% of the sample is found to have a particular characteristic or view, there is an estimated 95% chance that the true population percentage lies in the range of +/- 5.5%, i.e. between 14.5% and 25.5%.

1.5 Notes to the reader

- All percentages are rounded to the nearest whole figure so on occasions figures may not exactly equal 100%
- A "0" indicates a value of less than 0.5%
- A dash (-) indicates no value

Throughout the report, the data will be analysed by type of visitor including local trip from home, day out from home, day visit whilst on holiday elsewhere and holiday or short break (staying only in the Malvern Hills and Commons area) along with analysis by resident/non-resident, origin and new and repeat visitors.

With the help of the client team and using the postcodes collected throughout the survey period, residents have been defined as those living within a three-mile radius of the Malvern Hills and Commons and have been coded accordingly.

To assist with the interviewing process, respondents were provided with a showcard of answers relating to specific questions to select from when giving their replies. The questionnaire in Appendix 1 shows where a showcard was used. In addition to these, the interviewers read out the question and asked the respondent to reply. Where there are open-ended questions such as Q17 and Q18, no prompts or showcards were used.

1.6 Location of Interviews

The interviews were conducted at a variety of locations across the Malvern Hills and Commons. A map showing the area covered by the survey was shown to respondents during the interviewing process – see Appendix 2.

A list of where the interviews took place are shown in Table 1.2 below. Most locations had at least 4-5 days allocated to them, some of which were split into early morning, daytime and early evening to pick up the different types of visitor.

	No	%
Swinyards Car Park	106	25%
British Camp Car Park	101	24%
Worcestershire Beacon Car Park and Summit	100	23%
North Quarry Car Park	69	16%
Hollybush Car Park	50	12%

North Quarry Car Park had the highest number of visitors on a local trip from home (75%) followed by British Camp and Swinyards Car Park (61%) respectively). Both British Camp and Hollybush had the largest share of those on holiday or short break staying in the Malvern Hills and Commons area – 28% each.

		Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying only in area)	
Base	426	60%	18%	3%	19%	100%
Swinyards Car Park	106	61%	22%	4%	13%	100%
British Camp	101	61%	10%	1%	28%	100%
Worcestershire Beacon	100	57%	18%	4%	21%	100%
North Quarry Car Park	69	75%	14%	3%	7%	99%
Hollybush	50	42%	28%	2%	28%	100%
	Total	Resident (3- mile area)	Non-Resident (outside 3-mile area)	New	Repeat	
Base	426	22%	78%	15%	85%	100%
Swinyards Car Park	106	19%	81%	12%	88%	100%
British Camp	101	22%	78%	19%	81%	100%
Worcestershire Beacon	100	16%	84%	16%	84%	100%
North Quarry Car Park	69	42%	58%	7%	93%	100%
Hollybush	50	12%	88%	20%	80%	100%

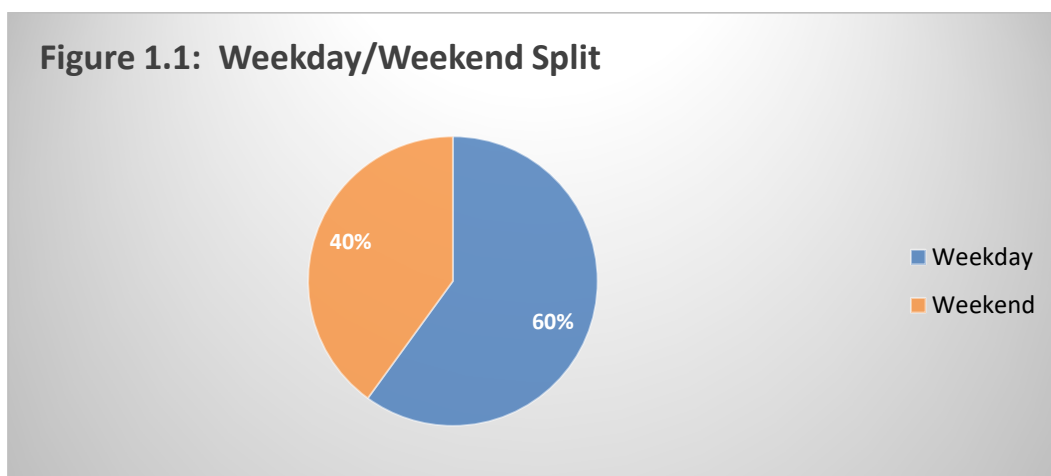
NB: Shown as row percentages

With the exception of North Quarry Car Park where 42% of visitors to the site were residents of the area, all other sites attracted the majority of visitors from outside of the Malvern Hills and Commons area.

Across all five locations, high levels of repeat visitors were seen, the lowest was at Hollybush (80%) and the highest at North Quarry Car Park (93%)

1.7 Day and Month of Interviews

Interviews were split over weekdays and weekends with 60% carried out on weekdays and 40% at weekends.

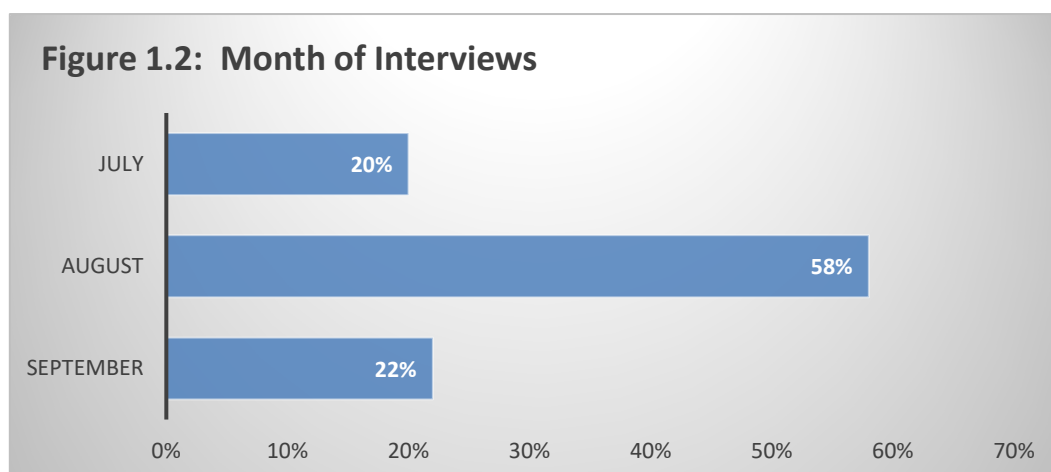


There was very little difference in the pattern of weekday/weekend visitors with both those on a local trip from home and those on a day out from home (59% weekday and 41% weekend respectively) on a par with the total sample. More non-residents visited during the week (62%) than those who lived near to the hills and commons.

Table 1.4: Weekday/Weekend by Type of Visitor (426)

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying only in area)	Resident	Non-Resident
Weekday	60%	59%	59%	83%	61%	56%	62%
Weekend	40%	41%	41%	17%	39%	44%	38%

Interviews were distributed across the main summer and early autumn period, from late July (20%), with the majority of interviews taking place throughout August (58%) through to September (22%)



The month of September saw 75% of visitors on a local trip from home compared with only 49% in July. July and August were most popular with those visitors on a holiday or short break staying only in the area where 23% each indicated they were on a visit of this nature. Across all three months, very few visitors were on a day visit to the Hills and Commons whilst on holiday elsewhere. August saw the highest number of non-residents making a trip to the Malvern Hills and Commons (75%) compared with 62% in July and 53% in September.

Table 1.5: Month of Interview by Type of Visitor **(426)**

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying only in area)	Resident	Non-Resident
July	20%	49%	24%	3%	23%	38%	62%
August	58%	59%	16%	3%	23%	25%	75%
September	22%	75%	17%	2%	6%	47%	53%

NB: Shown as row percentages

1.8 Time of Interviews

Interviewers recorded the time their interviews took place. The majority of interviews took place between 11 am and 3pm (57%). To pick up visitors to the hills and commons at all times of the day, the interviewing hours covered 7.30 in the morning, through to the early evening up to 19.30, with around a fifth (21%) of interviews conducted during the early and late sessions.

	%	Base
07.30-09.00	8%	34
09.01-1100	13%	55
11.01-13.00	26%	109
13.01 - 15.00	31%	131
15.01 - 17.00	10%	42
17.01-19.30	13%	55

Table 1.7 represents the number of interviews conducted during each time period by type of visitor. The majority of interviews across all types of visitors were conducted between the hours of 11.01 and 15.00. There were a greater number of staying visitors on the hills and commons during the period 09.01-1100 (18%) than those on a local trip from home (12%), a day out from home (9%) and visitors on a day visit whilst on holiday elsewhere (8%). The early morning walks before 9am appealed to those on a on a local trip from home (13%) and residents of Malvern Hills and Commons (19%).

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying only in area)	Resident	Non-Resident
07.30 - 09.00	10%	13%	1%	-	-	19%	2%
09.01 - 11.00	12%	12%	9%	8%	18%	13%	13%
11.01 - 13.00	24%	21%	33%	33%	30%	15%	31%
13.01 - 15.00	30%	26%	40%	42%	34%	20%	36%
15.01 - 17.00	11%	11%	9%	17%	6%	9%	10%
17.01 - 19.30	13%	16%	7%	-	11%	23%	8%

2.0 TYPE OF VISITOR

2.1 *Differentiating Between Visitor Types*

The survey data collected information on the type of trip that the visitor was making based on whether they were on a local trip from home, a day out from home, a day visit while on holiday elsewhere and those who were staying overnight in the Malvern Hills and Commons area.

Further analysis shows that eight out of ten visitors to the Malvern Hills and Commons were on a day trip with the remaining 19% staying overnight in the area.

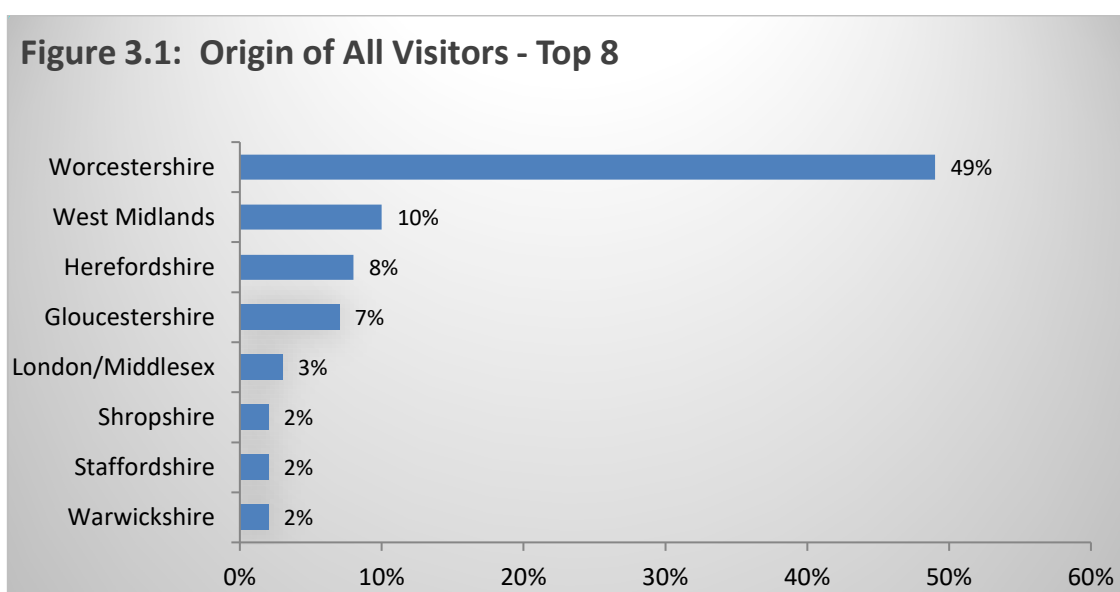
The day visitor element includes those visitors who were staying away from home outside of the Malvern Hills and Commons and travelling into the area to make a visit for the day. Therefore, included in the results for the day visitor, will be respondents who may be from other parts of the UK or from overseas.



3.0 ORIGIN OF VISITOR

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. The data has been analysed according to the main types of visit. This is the first step towards more detailed market segmentation. Using this basis, we can see overall the majority of visitors during the interviewing period came from Worcestershire, with almost half (49%) originating from the county. The next nearest supplier of visitors was from the West Midlands, 10% followed by 8% from the neighbouring counties of Herefordshire and Gloucestershire (7%).



Across all location sites, the top supplier was Worcestershire, although the proportions differed by site. Hollybush attracted 28% of visitors compared with North Quarry Car Park where almost three quarters of respondents came from Worcestershire. A full list is shown in Appendix 3.

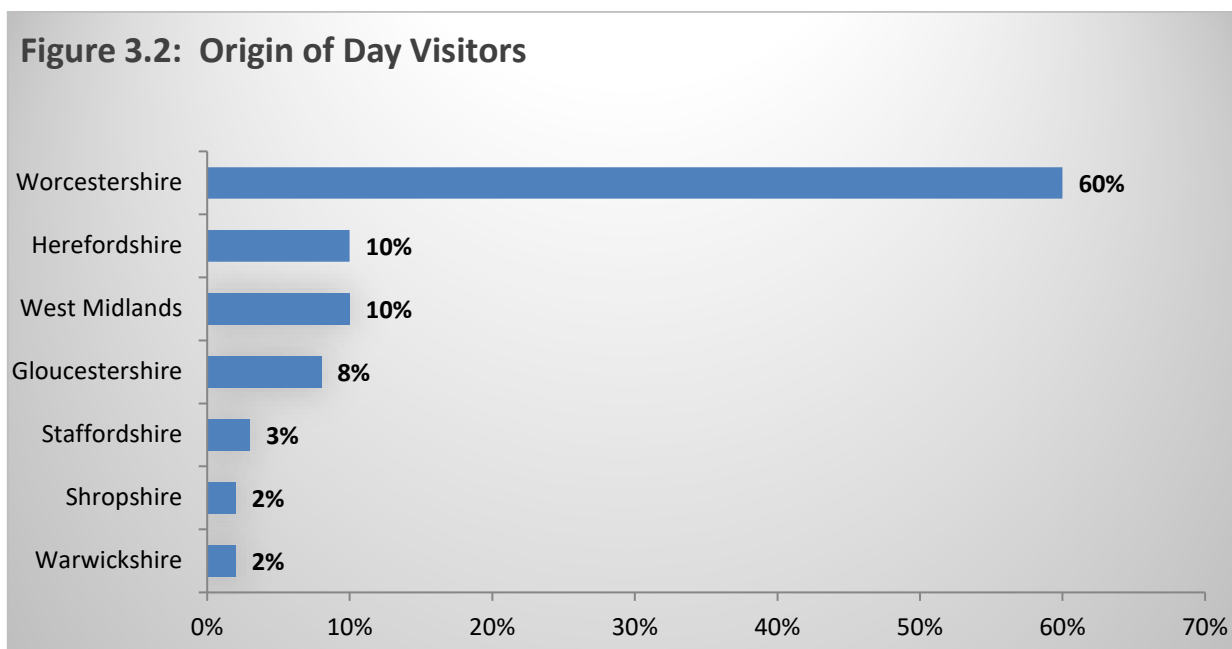
Table 3.1: Origin of All Visitors by Location – Top 8

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Worcestershire	49%	49%	43%	28%	48%	72%
West Midlands	10%	6%	16%	4%	10%	9%
Herefordshire	8%	9%	6%	18%	8%	3%
Gloucestershire	7%	3%	2%	10%	13%	9%
London/Middlesex	3%	3%	5%	2%	1%	1%
Shropshire	2%	1%	3%	-	4%	-
Staffordshire	2%	1%	2%	6%	2%	-
Warwickshire	2%	1%	3%	4%	1%	1%

3.2 Day Visitors

The catchment area for the day trip sector has a strong core from within the county of Worcestershire (60%) and the neighbouring counties of Herefordshire and the West Midlands (10% respectively), followed by Gloucestershire (8%).

Table 3.2 below shows that there are distinct variations as to the performance of the counties concerned. Unsurprisingly, the majority of counties named all lie within an approximate 1-2 hours travel time from Malvern Hills and Commons. A full list of day visitors is shown in Appendix 4.



NB: The West Midlands Conurbation area consists of Birmingham, Solihull, Dudley, Sandwell, Walsall and Wolverhampton

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Worcestershire	60%	67%	54%	39%	55%	77%
Herefordshire	10%	12%	8%	25%	10%	3%
West Midlands	10%	7%	18%	3%	9%	8%
Gloucestershire	8%	4%	3%	11%	12%	9%
Staffordshire	2%	1%	1%	8%	2%	-
Shropshire	2%	1%	3%	-	3%	-
Warwickshire	2%	1%	4%	3%	1%	-

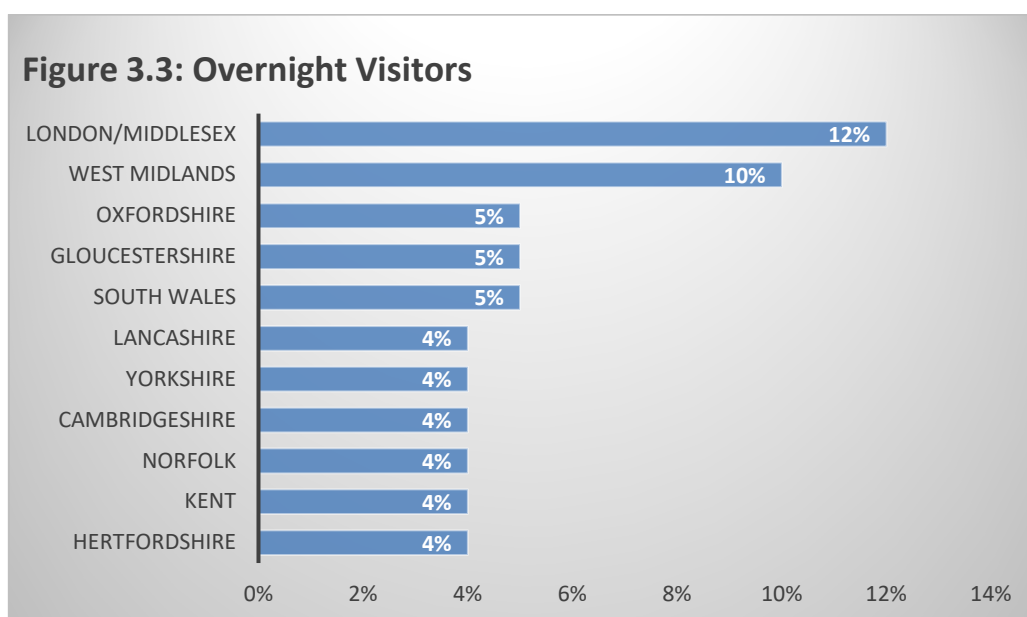
The county of Worcestershire had the highest number of returning visitors which is not surprising as a third (33%) of all visitors were local residents to the Malvern Hills and Commons. Worcestershire dominated the day

visitor market for respondents at North Quarry Car Park (77%) and British Camp (67%), with Swinyards Car Park and Worcestershire Beacon each supplying 55% and 54% of visitors from Worcestershire. The close proximity of Herefordshire to the Hollybush location can be seen with a quarter (25%) of all day visitors originating from there. Generally, the West Midlands Region dominated the day visitor market to Malvern Hills and Commons. The large number of day visitors to the area will presents a challenge in the management of people and vehicles moving around the area.

3.3 Overnight Visitors

The overnight visitor market is of particular importance to any destination in terms of the economic impact of such visitors. Overnight visitors not only stay longer than the day visitors but also spend more on a daily basis.

The following analysis in the table below includes all visitors staying overnight in the area. This shows the origin of such visitors by county/country. Visitors from the South-East region of the country supply the largest share of domestic overnight visitors to the area (12%). The main overnight market is drawn from a diverse base, from South to North and East to West. A full list is shown in Appendix 5.



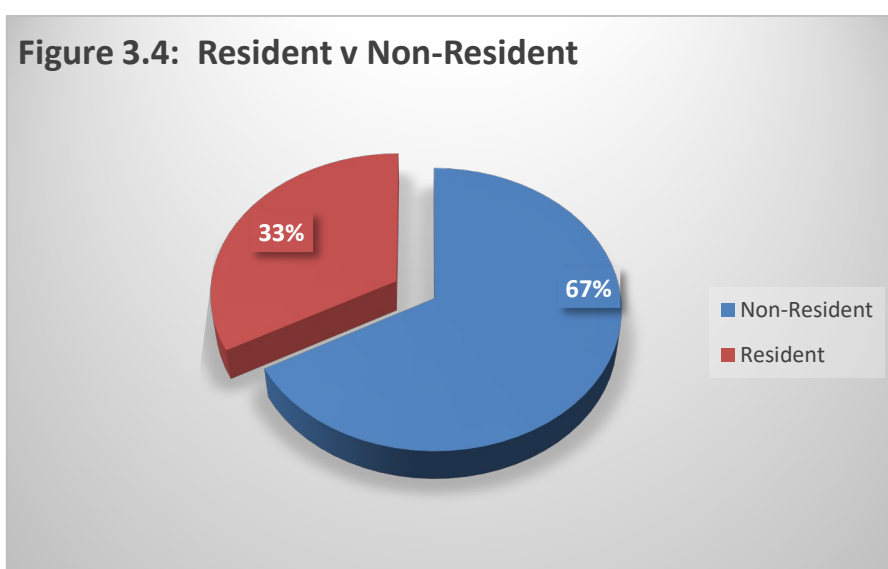
Almost a quarter of respondents at Worcestershire Beacon were from London/Middlesex, compared with only 7% at Hollybush. The range of places supplying overnight visitors to each of the locations was fairly spread out across the country. The small sample base should be taken into account when using these results.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Base	82	28	21	14	14	5
London/Middlesex	12%	11%	24%	7%	-	20%
West Midlands	10%	4%	10%	7%	21%	20%
Gloucestershire	5%	-	-	7%	21%	-
Oxfordshire	5%	-	5%	7%	14%	-
South Wales	5%	4%	-	7%	14%	-
Lancashire	4%	7%	5%	-	-	-
Yorkshire West	4%	4%	-	14%	-	-
Cambridgeshire	4%	11%	-	-	-	-
Norfolk	4%	-	5%	14%	-	-
Kent	4%	4%	10%	-	-	-
Hertfordshire	4%	-	-	14%	7%	-

3.4 Resident/Non-Resident

As previously mentioned, the client team using the postcodes collected throughout the survey period, defined whether the interviewee was a resident or non-resident of the area by those living within a three-mile radius of the Malvern Hills and Commons and have been coded accordingly.

A third (33%) of all visitors to the Malvern Hills and Commons came from within a 3-mile radius and were classified as a resident. The majority were non-residents who came from the county of Worcestershire and Herefordshire along with visitors from the rest of the UK and a small number from overseas.



With the exception of North Quarry Car Park where 61% of those interviewed were residents of the area, the majority of respondents across each of the location sites were classed as non-residents. Over eight out ten respondents (84%) at Hollybush lived outside of the area of the 3-mile radius of residents of the Malvern Hills and Commons.

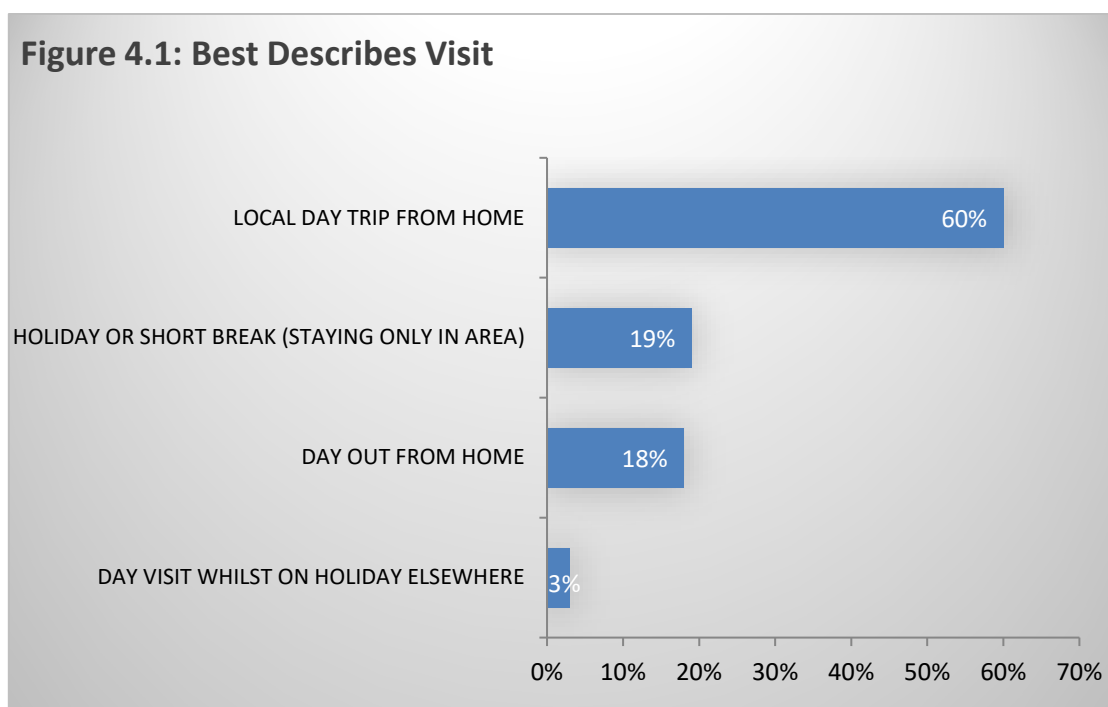
	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Resident	33%	34%	27%	16%	26%	61%
Non-Resident	67%	66%	73%	84%	74%	39%

In terms of managing visitors, those residents living nearby are aware of the car parking, with many having permits to use the car parks on a regular basis and would be more aware of the work that is undertaken by both the Trust and the AONB.

4.0 TYPE OF VISIT

4.1 Best Describes Visit by Type

Respondents were asked what best described their visit on the day of interview. Overall, six out of ten respondents (60%) of visitors were on a local day trip from home. A much smaller number of visitors were on a holiday or short break staying in the area (19%), followed by 18% who were on a day visit from home outside of the area. Only 3% had cited a day visit whilst on holiday elsewhere.



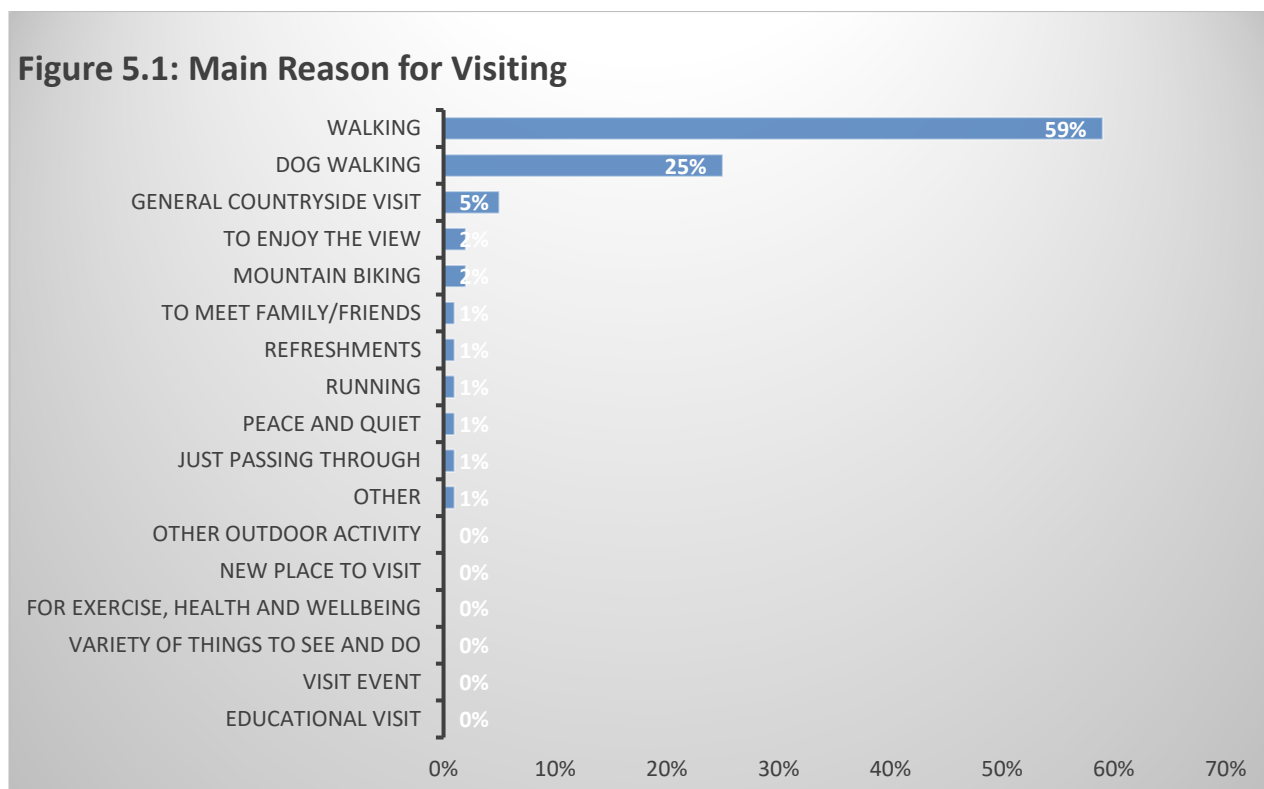
The majority of repeat visitors were local to the area on a day trip from home (69%) compared with 11% of first-time visitors to the area. Just under two thirds (65%) of new visitors were on a holiday or short break in the area compared with only 11% of visitors who had been before.

	Total	New	Repeat
Local trip from home	60%	11%	69%
Holiday or short break (staying only in the area)	19%	65%	11%
Day out from home	18%	16%	18%
Day visit whilst on holiday elsewhere	3%	8%	2%

5.0 REASON FOR VISITING

5.1 Primary and Other Reasons

Both residents and non-residents who were interviewed on the Malvern Hills and Commons were asked the main reason for coming to the area on the day of interview. Almost six out of ten (59%) stated their primary reason was for walking, with 25% taking their dog for a walk, accounting in total for 84% of responses. Much smaller numbers noted; general countryside visit (5%) and to enjoy the view and mountain biking – 2% respectively.



Across all types of visitor, walking the hills and commons was the primary reason for people making their trip. This varied from 56% of respondents who were on a local trip from home, to 75% who were on a day visit whilst on holiday elsewhere. Two thirds (66%) of non-residents and 63% of first-time visitors cited walking as their top reason for visiting the hills and commons, much higher than locals (45%).

Dog walking was the second reason given by residents (40%), more than double that of those from outside the area (18%).

In general, there were very few other significant reasons cited by respondents. 8% of respondents who were on a day visit whilst in the area mentioned to enjoy the view and general countryside visit and 3% of residents cited mountain biking.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
Walking	59%	56%	60%	75%	66%	45%	66%	63%	58%
Dog walking	25%	29%	21%	8%	18%	40%	18%	19%	26%
General countryside visit	5%	5%	4%	8%	5%	6%	4%	6%	4%
To enjoy the view	2%	2%	1%	8%	2%	1%	3%	5%	2%
Mountain biking	2%	2%	-	-	1%	3%	1%	-	2%
To meet family/friends	1%	1%	3%	-	1%	1%	2%	-	2%
Refreshments	1%	1%	3%	-	-	1%	1%	-	1%
Running	1%	1%	-	-	1%	1%	1%	2%	1%
Peace and quiet	1%	0%	1%	-	1%	1%	0%	2%	1%
Just passing through	1%	1%	-	-	1%	1%	1%	2%	1%
Other	1%	-	4%	-	-	-	1%	-	1%
Other outdoor activity	0%	1%	-	-	-	1%	0%	-	1%
New place to come to/not been before	0%	-	-	-	1%	-	0%	2%	-
For exercise, health and wellbeing	0%	0%	-	-	-	-	0%	-	0%
Variety of things to see and do	0%	-	1%	-	-	-	0%	-	0%
Visit event	0%	-	-	-	1%	-	0%	-	0%
Educational visit	0%	-	1%	-	-	-	0%	-	0%

Walking the hills and commons was the top response for respondents interviewed at Worcestershire Beacon (75%) compared with just over a third (36%) who were interviewed at North Quarry Car Park. Walking the dog on the Worcestershire Beacon was considerably lower (13%) than those respondents at Hollybush and North Quarry Car Park (34% and 33% respectively).

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Walking	59%	61%	75%	58%	58%	36%
Dog walking	25%	27%	13%	34%	25%	33%
General countryside visit	5%	2%	6%	-	5%	10%
To enjoy the view	2%	2%	3%	2%	4%	-
Mountain biking	2%	4%	-	-	2%	1%
To meet family/friends	1%	1%	1%	-	2%	3%
Refreshments	1%	1%	-	-	-	6%
Running	1%	-	2%	2%	-	1%
Peace and quiet	1%	-	-	2%	2%	-
Just passing through	1%	1%	-	-	-	3%
Other	1%	-	-	2%	1%	1%
Other outdoor activity	0%	1%	-	-	-	1%
New place to come to/not been before	0%	-	-	-	1%	-
For exercise, health and wellbeing	0%	-	-	-	1%	-
Variety of things to see and do	0%	-	-	-	1%	-
Visit event	0%	-	-	-	-	1%
Educational visit	0%	-	-	-	-	1%

Across all locations, walking and walking the dog was the top two reasons for visiting the Hills and Commons.

When looking at the type of activity undertaken by respondents, there are some significant differences in the length of time they stayed on the Hills and Commons. All respondents who were walking the Hills and Commons stayed on average **2 hours and 38 minutes**, this rose to **3 hours and 7 minutes** for respondents on a holiday or short break who were staying in the area, to residents who walked for **1 hour and 26 minutes**.

The longest time spent in the area was **3 hours and 15 minutes** by respondents who were on a day out from home walking their dog.

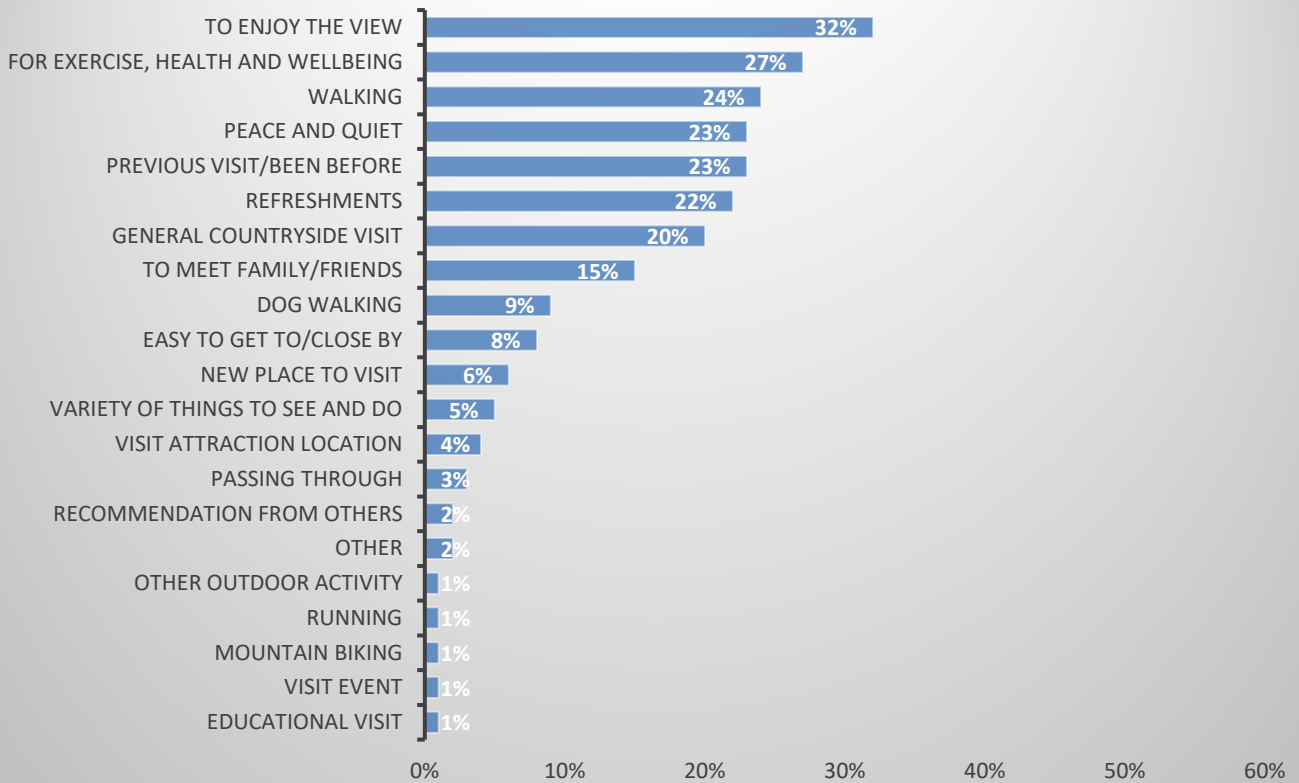
	Walking	Dog Walking	Mountain Biking	Running	Health and Wellbeing
All visitors	2 hours, 38 minutes	1 hour, 50 minutes	1 hour, 8 minutes	1 hour, 45 minutes	-
Local Trip from Home	2 hours, 20 minutes	1 hour, 17 minutes	2 hours, 10 minutes	1 hour, 40 minutes	-
Day Out from Home	3 hours, 1 minute	3 hours, 15 minutes	-	-	-
Day Visit Whilst on Holiday Elsewhere	3 hours	-	-	-	-
Holiday or Short Break (staying in area)	3 hours, 7 minutes	3 hours, 4 minutes	-	-	-
Resident	1 hour, 26 minutes	1 hour, 5 minutes	2 hours	-	-
Non-Resident	3 hours, 2 minutes	2 hours, 38 minutes	2 hours, 20 minutes	2 hours	-

- low sample base

5.2 Other Reasons for Visiting

Respondents were also asked what other reasons had brought them to visit the Malvern Hills and Commons on the day they were interviewed. To enjoy the view was cited by almost a third of all respondents (32%), followed by exercise, health and wellbeing (27%). Walking the hills and commons (24%), the peace and quiet and a previous visit was mentioned by 23% of respondents respectively.

Figure 5.2: Other Reasons for Visiting



There was a more mixed response when asked what other reasons respondents had visited the Malvern Hills and Commons. To enjoy the view was the top response for those on a holiday or short break in the area (47%), day visit whilst on holiday elsewhere and respondents on a day out from home (40% and 36% each). Respondents who were on a local trip from home cited walking as their secondary highest activity undertaken, also mentioned by 44% of residents and over a quarter of repeat visitors (27%).

Exercise, health and wellbeing was mentioned by those respondents who were on a local trip from home, non-residents and those returning to the area, higher than all other markets.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
To enjoy the view	32%	25%	36%	40%	47%	19%	38%	51%	29%
For exercise, health and wellbeing	27%	28%	21%	20%	30%	21%	30%	24%	28%
Walking	24%	32%	16%	-	10%	44%	15%	7%	27%
Peace and quiet	23%	21%	27%	40%	23%	12%	27%	25%	22%
Enjoyed a previous visit/been before	23%	20%	34%	40%	19%	17%	25%	5%	26%
Refreshments	22%	13%	36%	40%	30%	8%	27%	25%	21%
General countryside visit	20%	14%	25%	20%	30%	10%	24%	27%	18%
To meet family/friends	15%	15%	15%	20%	16%	13%	16%	13%	15%
Dog walking	9%	11%	4%	20%	9%	4%	12%	4%	11%
Easy to get to/close by	8%	11%	6%	-	3%	9%	8%	4%	9%
New place to come to/not been before	6%	2%	4%	20%	19%	-	9%	36%	1%
Variety of things to see and do	5%	3%	6%	-	12%	1%	7%	16%	3%
Visit attraction location	4%	2%	4%	20%	9%	1%	5%	9%	3%
Just passing through	3%	2%	3%	20%	4%	1%	4%	9%	2%
Recommendation from others	2%	1%	3%	-	5%	-	3%	11%	1%
Other	2%	1%	1%	-	4%	1%	2%	2%	2%
Other outdoor activity	1%	1%	3%	-	1%	-	2%	-	2%
Running	1%	1%	1%	-	1%	1%	1%	-	1%
Mountain biking	1%	1%	-	-	3%	1%	1%	5%	0%
Visit event	1%	1%	1%	-	1%	-	1%	-	1%
Educational visit	1%	-	1%	-	1%	1%	0%	2%	0%

When looking at the results by location, there was a variety of responses including 71% of respondents interviewed at Hollybush who were there to enjoy the view and 58% who had visited for exercise, health and wellbeing, considerably higher than any other location. Walking was the top other reason for visiting by respondents at Worcestershire Beacon (33%) compared with only 4% of respondents at Hollybush who noted walking as a reason to visit.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
To enjoy the view	32%	36%	18%	71%	29%	12%
For exercise, health and wellbeing	27%	33%	15%	58%	23%	7%
Walking	24%	20%	33%	4%	26%	32%
Peace and quiet	23%	12%	16%	52%	29%	15%
Enjoyed a previous visit/been before	23%	24%	20%	48%	16%	7%
Refreshments	22%	32%	16%	29%	8%	24%
General countryside visit	20%	21%	23%	33%	10%	15%
To meet family/friends	15%	13%	13%	23%	14%	17%
Dog walking	9%	4%	11%	4%	21%	2%
Easy to get to/close by	8%	8%	3%	15%	8%	12%
New place to come to/not been before	6%	6%	6%	13%	4%	5%
Variety of things to see and do	5%	3%	4%	19%	3%	2%
Visit attraction location	4%	3%	4%	8%	4%	2%
Just passing through	3%	3%	-	-	6%	5%
Recommendation from others	2%	2%	3%	8%	-	-
Other	2%	3%	3%	-	1%	-
Other outdoor activity	1%	-	4%	2%	-	2%
Running	1%	-	-	-	-	10%
Mountain biking	1%	2%	3%	-	-	-
Visit event	1%	-	1%	-	1%	2%
Educational visit	1%	-	1%	-	1%	-

6.0 DEMOGRAPHIC PROFILE OF VISITORS

6.1 Average Party Size

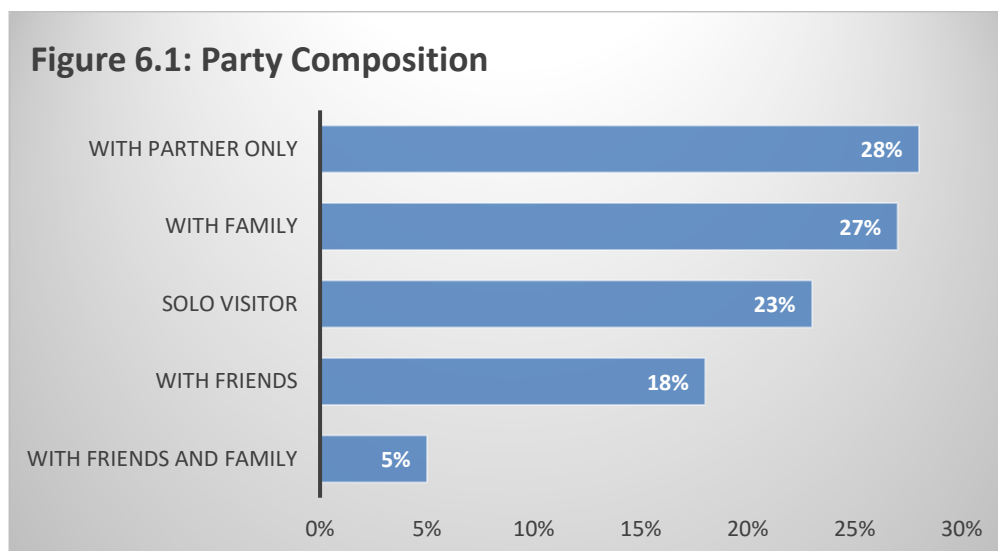
A total of 426 parties of visitors were surveyed. All respondents provided demographic data on their group. The average (mean) number of people per group was approximately 2.4 giving a total of at least 1,007 people included in the survey sample. 344 parties of day visitors provided data, equating to 778 people giving an average mean score of 2.3 day visitors per group.

82 parties of overnight visitors gave data for analysis, with a total of 229 people included in the sample, giving an average mean score of 2.8. The party structure of those visiting is shown in Figure 6.1 below.

Visitor Type	Average Party Size
All visitors	2.4
Local Trip from Home	2.2
Day Out from Home	2.6
Day Visit Whilst on Holiday Elsewhere	2.4
Holiday or Short Break (staying in area)	2.8
Resident	2.1
Non-Resident	2.5
New	2.7
Repeat	2.3

6.2 Party Composition

Across all visitors, travelling with a partner was the top response (28%), closely followed by visiting with family (27%). Travelling as a group with friends and family was the lowest response noted by visitors (5%).



Visiting the area with family only was highest amongst visitors on a holiday or short break staying in the area and those on a day visit whilst staying elsewhere (39% and 33% respectively). Respondents on a local trip from home saw the greatest number of solo visitors to the Malvern Hills and Commons (31%) with around a quarter (24%) of visitors on a day out from home on a trip with their friends.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
Adult couple	28%	28%	20%	50%	33%	25%	30%	38%	26%
With family	27%	21%	31%	33%	39%	19%	30%	35%	25%
Solo visitor	23%	31%	19%	-	4%	38%	15%	5%	26%
With friends	18%	17%	24%	17%	16%	14%	20%	13%	19%
With friends & family	5%	4%	7%	-	9%	4%	6%	10%	4%

As with those on a local trip from, residents of the area saw more visitors to the Malvern Hills and Commons making a trip on their own than any other category.

More new visitors were visiting with their partners and with family than those on a return visit to the area.

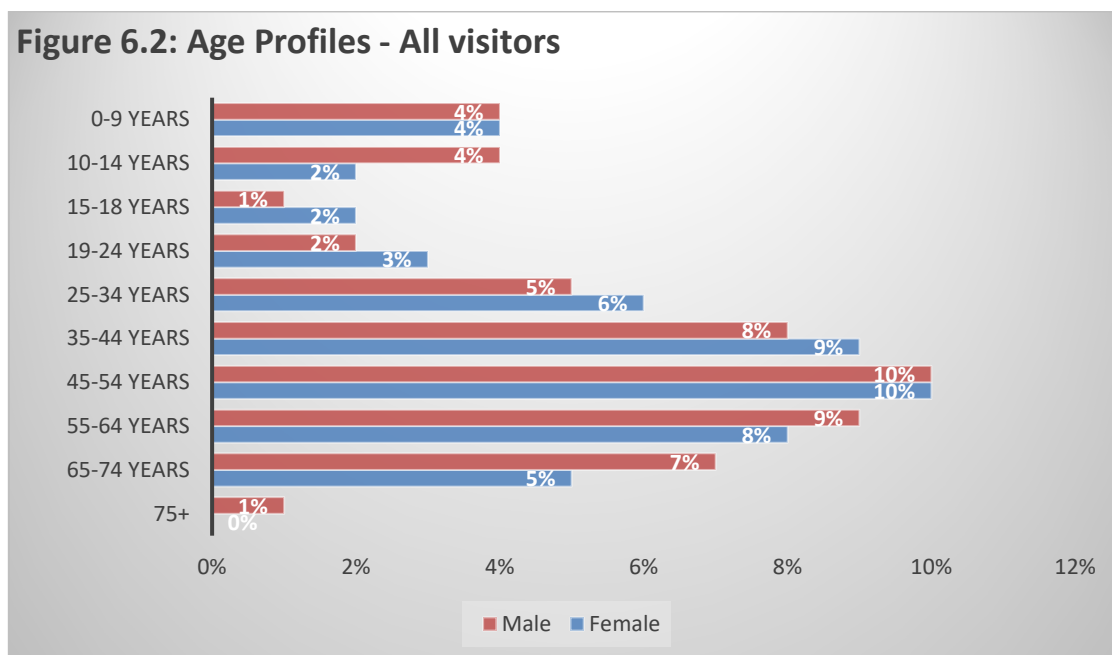
British Camp and Swinyards Car Park attracted more respondents on a visit with their partner than the three other locations. Solo visitors were more prevalent at North Quarry Car Park (32%) compared with only 14% at the Worcestershire Beacon.

Across all locations, only small numbers of respondents were making a visit with their friends and family.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Adult couple	28%	34%	26%	24%	30%	23%
With family	27%	29%	29%	26%	23%	26%
Solo visitor	23%	21%	14%	24%	25%	32%
With friends	18%	12%	24%	26%	17%	17%
With friends & family	5%	5%	7%	-	5%	5%

6.3 Age Profile

The breakdown of the different age groups and the ratios of males: females in each category are shown in the table and figure below. The figures include the ages of individuals who travelled to the Malvern Hills and Commons, individually or as part of a group. No one interviewed were visiting as part of a coach party. Table 6.4 shows the age profiles of people visiting the area. Overall, 51% of all respondents were male, 49% female.



The largest age group recorded was the group aged 45-54 years (20%), followed by 35-44 and those aged 55-64 years, both 17%. Very few visitors to the area were in the oldest age category of 75+ (1%).

Table 6.4: Age Profile by Type of Visitor (426)

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
0-9 years	8%	7%	9%	10%	11%	6%	9%	11%	8%
10-14 years	6%	6%	9%	15%	7%	6%	8%	6%	8%
15-18 years	3%	4%	5%	-	1%	6%	3%	3%	3%
19-24 years	5%	4%	7%	5%	5%	3%	6%	8%	4%
25-34 years	11%	10%	8%	15%	12%	10%	10%	17%	9%
35-44 years	17%	18%	19%	25%	13%	19%	16%	15%	18%
45-54 years	20%	20%	16%	20%	22%	24%	18%	17%	20%
55-64 years	17%	16%	17%	5%	16%	16%	16%	17%	16%
65-74 years	12%	14%	9%	5%	7%	11%	12%	5%	13%
75+	1%	1%	2%	-	4%	2%	2%	1%	2%

More younger visitors aged under 24 years were seen in those on a day visit whilst on holiday staying elsewhere, those on a day trip from home (30% each), first-time visitors (28%) and non-residents (26%) compared with all other categories.

Table 6.5: Age Profile by Location

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
0-9 years	8%	8%	9%	10%	6%	8%
10-14 years	6%	9%	9%	5%	4%	8%
15-18 years	3%	3%	4%	1%	4%	5%
19-24 years	5%	4%	4%	5%	8%	4%
25-34 years	11%	9%	11%	8%	13%	9%
35-44 years	17%	12%	22%	23%	13%	20%
45-54 years	20%	23%	15%	24%	17%	23%
55-64 years	17%	20%	11%	18%	21%	11%
65-74 years	12%	11%	13%	5%	13%	11%
75+	1%	2%	3%	1%	1%	-

Almost a quarter (24%) of visitors to Hollybush and 23% of visitors to both British Camp and North Quarry Car Park were aged 45-54 years, higher than both visitors to Swinyards Car Park and Worcestershire Beacon (17% and 15% respectively). Swinyards Car Park had the lowest number of visitors aged 18 and under visiting the site (14%) compared with 22% in this age category at Worcestershire Beacon and 21% at North Quarry Car Parks.

6.4 The Family Market

The survey was undertaken during weekends/weekdays, school holidays and term time. The proportion of groups with children under the age of 18 varies by type of visitor (trip), time and the interview location. Overall, a quarter (25%) of groups contained children under the age of 18; and not necessarily all as families, there may also be friendship groups or social club-based groups; 75% did not have minors within their group. In terms of total numbers, 105 children under the age of 18 made up the parties visiting the Malvern Hills and Commons, from a total survey population of 426, (25%).

Figure 6.3: Children in Group

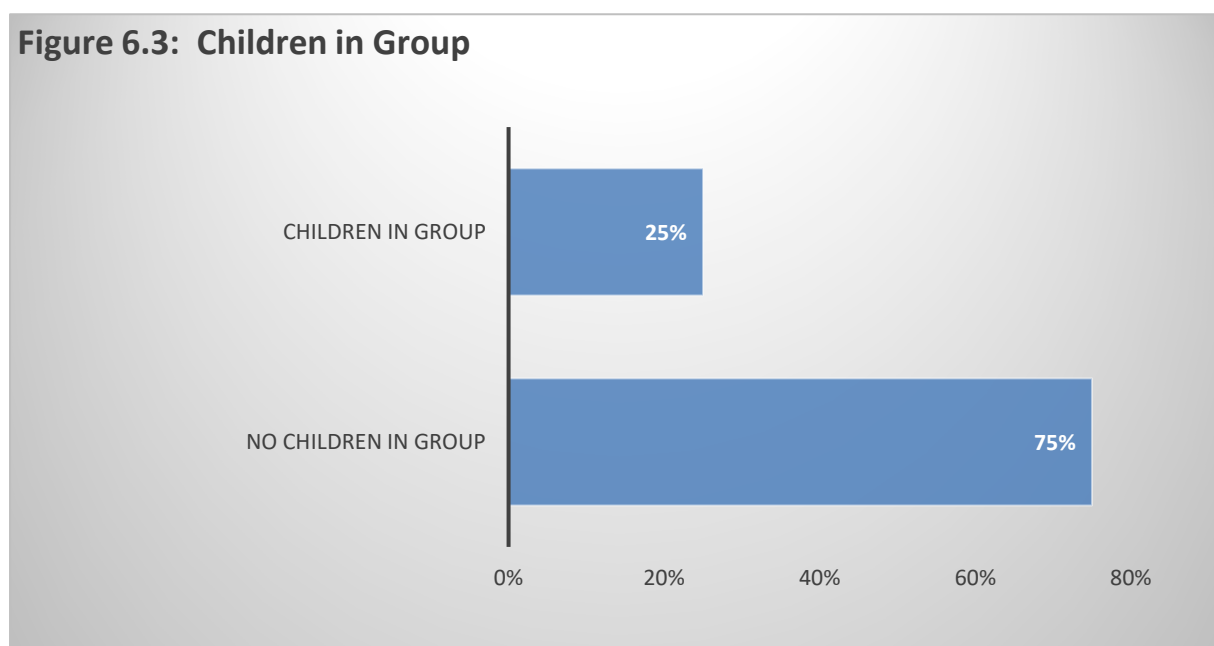


Table 6.6 shows the differences between the type of visitors with or without children in their party.

Table 6.6: Children in Group by Type of Visitor (426)									
	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
Children in Group	25%	21%	31%	25%	29%	22%	26%	29%	24%
No children in group	75%	79%	69%	75%	71%	78%	74%	71%	76%

Visitors on a day out from home (31%), non-residents (26%) and those on a first visit to Malvern Hills and Commons (29%), were more likely to have children in their party than any other type of visitor.

Table 6.7: Children in Group by Location						
	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Children in Group	25%	27%	30%	22%	17%	28%
No children in group	75%	73%	70%	78%	83%	72%

Swinyards Car Park had the least number of children in their group (17%) compared with 30% at Worcestershire Beacon and 28% at North Quarry Car Park.

7.0 CHIEF INCOME EARNER

7.1 Categorising the Visitor

Respondents were shown a card and asked to indicate which category applied to the chief income earner in the household.

Generally, most visitors were employed on a full-time basis with 58% in full-time employment. Just 4% were in part-time employment and a further 10% self-employed. Just over a fifth (21%) were retired with company/private pension compared with 1% who were retired on a state pension only.

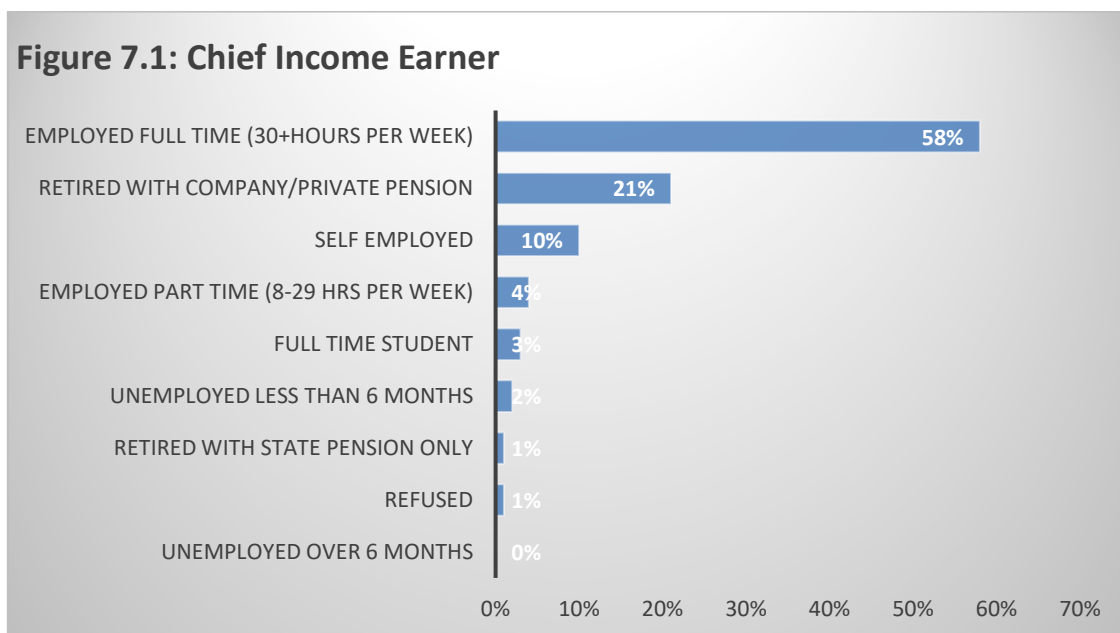


Table 7.1 shows that most full-time workers were those on a visit to The Malvern Hills and Commons on a day visit staying elsewhere (75%) and those on a first-time visit (65%). There was very little difference in the number of residents/non-residents who were in full time employment. Visitors on a day out from home and non-residents of the area saw the highest number of visitors on a company/private pension (24% and 25% respectively).

Residents of Malvern Hills and Commons had the most self-employed people (14%), compared with only 8% of non-residents.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
Employed full time (30+ hours per week)	58%	54%	55%	75%	67%	57%	58%	65%	56%
Retired with Company/Private Pension	21%	21%	24%	8%	21%	13%	25%	17%	21%
Self employed	10%	10%	12%	-	9%	14%	8%	10%	10%
Employed part-time (8-29 hours per wk)	4%	6%	3%	-	1%	7%	3%	2%	5%
Full-time student	3%	4%	3%	8%	2%	4%	3%	5%	3%
Unemployed – less than 6 months	2%	3%	1%	-	-	2%	2%	-	2%
Retired with state pension only	1%	2%	-	-	-	1%	1%	-	2%
Refused	1%	1%	1%	-	-	1%	0%	-	1%
Unemployed – over 6 months	0%	-	1%	8%	-	-	1%	2%	0%
Working less than 8 hours per wk	-	-	-	-	-	-	-	-	-

Full-time employment was highest in visitors to Worcestershire Beacon and lowest in respondents interviewed at Swinyards Car Park (47%). Hollybush saw the highest number of self-employed visitors – 20%, almost three times the number at Swinyards Car Park (6%).

Those retired on a state pension was fairly even across all locations (1-3%).

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Employed full time (30+ hours per week)	58%	61%	65%	54%	47%	59%
Retired with Company/Private Pension	21%	21%	17%	22%	29%	13%
Self employed	10%	9%	8%	20%	6%	12%
Employed part-time (8-29 hours per wk)	4%	7%	2%	2%	4%	6%
Full-time student	3%	-	5%	2%	3%	7%
Unemployed – less than 6 months	2%	-	1%	-	5%	3%
Retired with state pension only	1%	2%	1%	-	3%	-
Refused	1%	-	-	-	3%	-
Unemployed – over 6 months	0%	-	1%	-	1%	-
Working less than 8 hours per wk	-	-	-	-	-	-

8.0 NEW/REPEAT VISITORS

8.1 Segment Variation

Over eight out of ten respondents, (85%) were repeat visitors, with 15% or one in six being first time visitors. This is however not surprising with a high proportion of visitors originating from within Worcestershire itself. The proximity of the Hills and Commons to many repeat visitors lends itself to multiple visits. As you might expect, those living outside of the county were more likely to be on a first visit than those who live in the area.

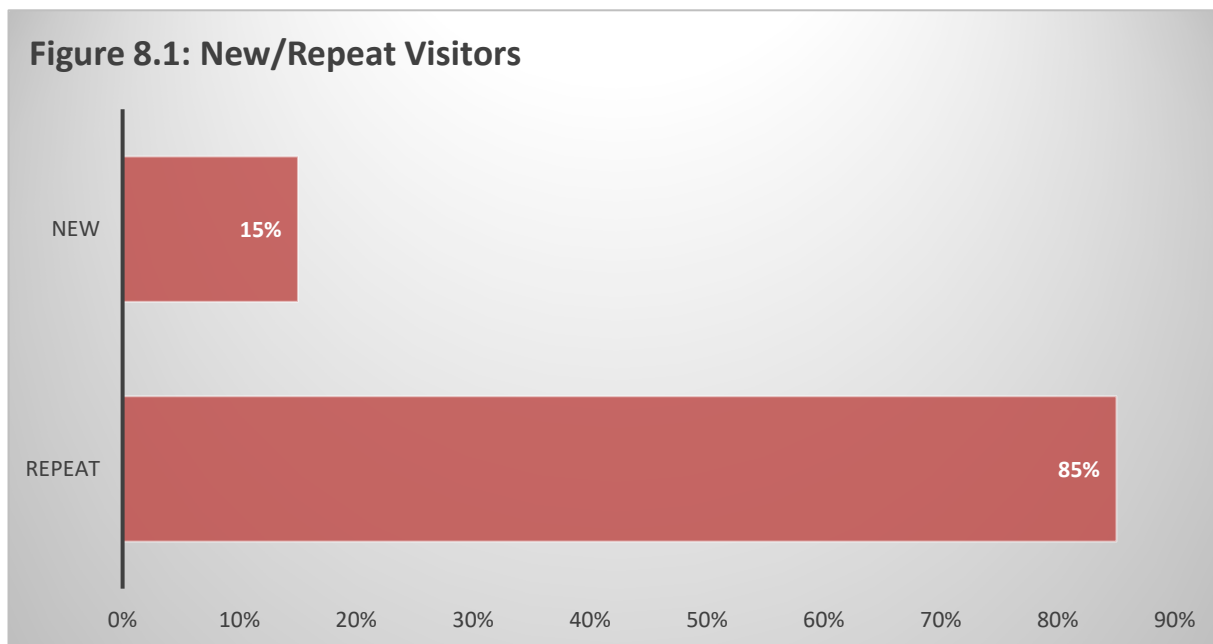


Table 8.1: New/Repeat by Type of Visitor

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident
New	15%	3%	14%	42%	50%	-	22%
Repeat	85%	97%	87%	58%	50%	100%	78%

Day visitors on a local trip from home, are high repeat markets (97% repeat, 3% new), whilst visitors staying overnight in the area saw an even split of both new and returning visitors. All residents had made a previous visit, as did 78% of non-residents.

8.2 New/Repeat Visitors by Location

When considering the individual interview locations, the difference in the ratios of new to repeat visitors can be seen.

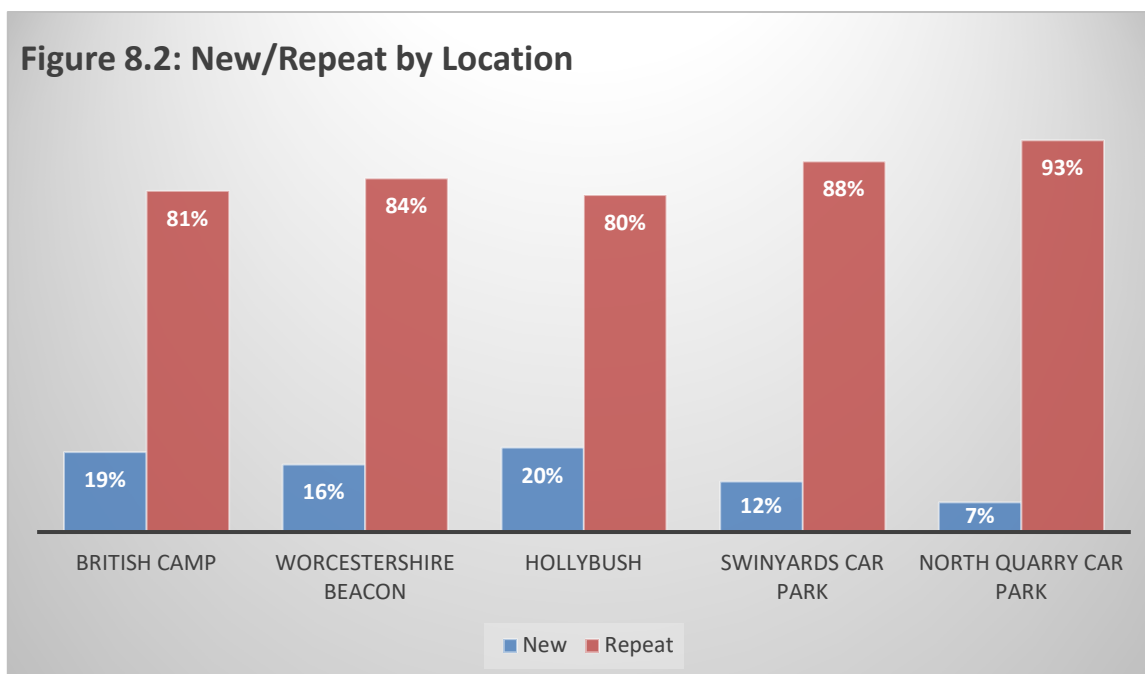


Table 8.2: New/Repeat Visitors- by Interview Location

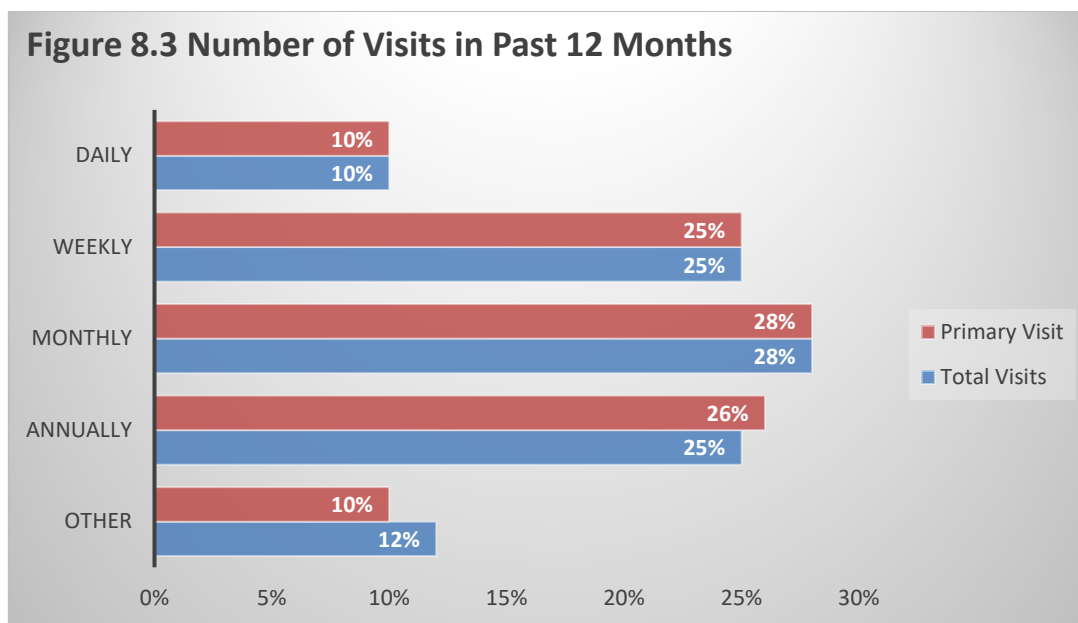
	New	Repeat
British Camp	19%	81%
Worcestershire Beacon	16%	84%
Hollybush	20%	80%
Swinyards Car Park	12%	88%
North Quarry Car Park	7%	93%

The highest number of repeat visitors were found at North Quarry Car Park (93%) and Swinyards Car Park (88%). Both Hollybush and British Camp saw less frequent visitors than the other sites (19% and 20% respectively).

8.3 Primary activity over past 12 months

Respondents who were on a repeat visit to the Malvern Hills and Commons were asked how many times they had visited the area in the past 12 months for the purpose of their primary activity on the day of interview and subsequently, the total number of visits in the past 12 months.

There was very little difference in the number of times respondents had visited in the past 12 months to participate in a similar activity on the day of interview compared with the total number of times they had visited the area in the past 12 months. Only Annual visits and “other” differed but this was only by a small number. Of those that gave “other” as a response, the majority had not made any visits in the past 12 months.



Residents and day visitors on a local trip from home made the greatest number of daily and weekly visits over the past 12 months for the purpose of the primary activity on the day on interview, more than all other types of visitor. This was the same for the total number of visits in the last 12 months.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident
Daily	10%	13%	6%	17%	-	21%	4%
Weekly	25%	34%	6%	-	2%	45%	12%
Monthly	28%	33%	28%	-	7%	32%	26%
Annually	26%	14%	46%	67%	63%	1%	41%
Other	10%	7%	14%	17%	27%	1%	17%
Total Number of Visits in Last 12 Months – by Visitor Type							
Daily	10%	13%	6%	17%	-	21%	4%
Weekly	25%	34%	5%	-	3%	46%	11%
Monthly	28%	32%	25%	-	8%	31%	26%
Annually	25%	14%	46%	67%	59%	1%	40%
Other	12%	7%	18%	17%	31%	1%	19%

Respondents on a holiday or short break staying in the area gave the greatest proportion of “other” responses (31%) as they had not visited at all in the last 12 months.

When looking at the difference by location, once again, there is little difference in the number of visitors who visited in the last 12 months for their primary activity on the day they were interviewed compared with the number total visits in the last 12 months made by respondents. Visitors to Swinyards Car Park made the least number of weekly visits (4%) but the highest percentage of monthly visits (32%) on the day of interview. The highest number of daily visits over the past 12 months was to North Quarry Car Park (15%), closely followed by Hollybush (13%) and Worcestershire Beacon (12%).

Table 8.4: Visited area for Primary Visit – by Location (362)						
	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Daily	10%	10%	12%	10%	4%	17%
Weekly	25%	23%	17%	18%	29%	36%
Monthly	28%	29%	31%	18%	32%	25%
Annually	26%	30%	25%	45%	24%	13%
Other	10%	7%	14%	10%	11%	9%
Total Number of Visits in Last 12 Months – by Location						
	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Daily	10%	10%	12%	13%	4%	15%
Weekly	25%	24%	17%	18%	26%	37%
Monthly	28%	28%	30%	13%	33%	26%
Annually	25%	30%	24%	46%	22%	13%
Other	12%	7%	16%	10%	15%	10%

9.0 LENGTH OF STAY

9.1 Length of Stay by Visitors to Malvern Hills & Commons

All respondent surveyed who visited the Malvern Hills and Commons for a day or overnight trip, were asked how long (in hours) they intended to spend in the area on the day of interview. The average length of stay was approximately **2 hours 23 minutes** which included all visitors at all locations. Table 9.1 shows the variation in time spent in the area by visitor type and location.

Visitors on a holiday or short break staying in the area spent more time in Malvern Hills and Commons than any other visitor – 3 hours 1 minute. Non-residents and new visitors were also more likely to spend slightly longer, 2 hours 54 minutes, and 2 hours 46 minutes, compared with residents of Malvern Hills and Commons (1 hour 18 minutes) and repeat visitors, 2 hours 19 minutes.

The length of time visitors stayed on the Malvern Hills and Commons varied by location. The longest period spent was at Hollybush, 3 hours and 12 minutes compared with only 1 hour and 23 minutes at North Quarry Car Park.

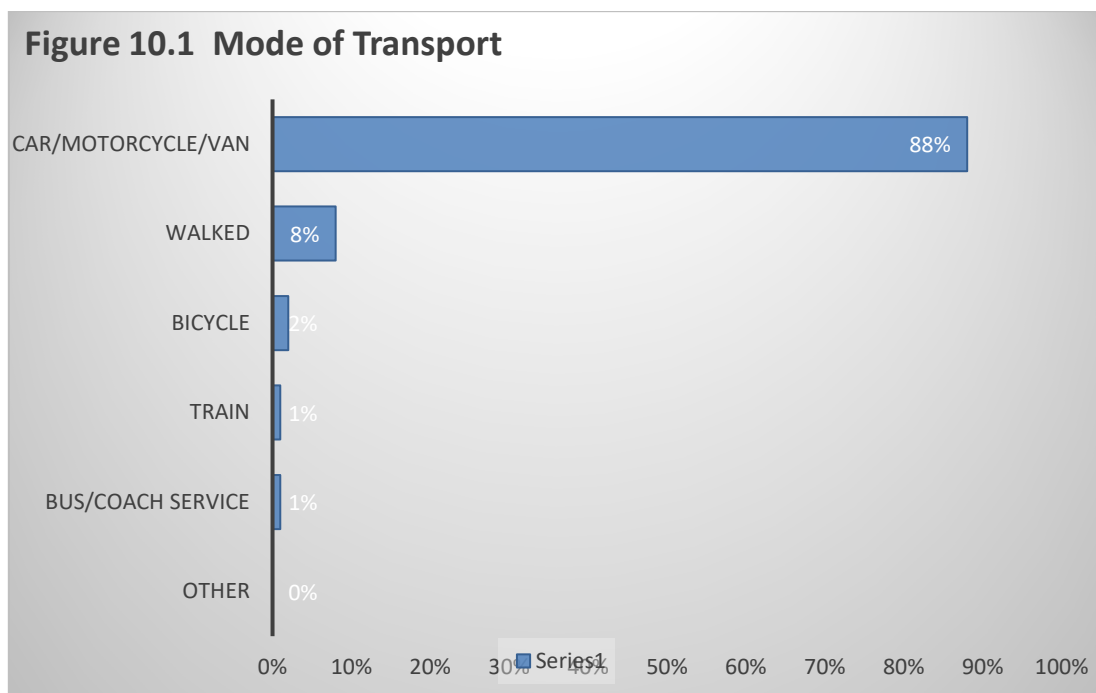
Table 9.1: Length of stay by Type of Visitor		(426)
All visitors	2 hours, 23 minutes	
Local Trip from Home	2 hours, 1 minute	
Day Out from Home	2 hours, 53 minutes	
Day Visit Whilst on Holiday Elsewhere	2 hours, 30 minutes	
Holiday or Short Break (staying in area)	3 hours, 1 minute	
Resident	1 hour, 18 minutes	
Non-Resident	2 hours, 54 minutes	
New	2 hours, 46 minutes	
Repeat	2 hours, 19 minutes	
Length of Stay by Location		
British Camp	2 hours, 13 minutes	
Worcestershire Beacon	2 hours, 46 minutes	
Hollybush	3 hours, 12 minutes	
Swinyards Car Park	2 hours, 26 minutes	
North Quarry Car Park	1 hour, 23 minutes	

10.0 MODE OF TRANSPORT

10.1 Car is Dominant Transport Mode

In the majority of visitor surveys, the car is the most dominant form of transport used to arrive at a destination. Almost all (86%) of visitors arrived by car, which is significantly above the England average of 61% (Great Britain Day Visits Survey, GBDVS 2017). It should be noted that this is based on all transport across England and not specifically to a rural destination such as Malvern Hills and Commons.

The next significant mode of transport was walking (8%) noted by visitors. Only a handful of visitors (2% combined) used forms of public transport as their main mode of transport to the area. However, the rural nature of the area and access to car parking may be a factor in the number of cars used to arrive in the area.



Across all types of visitor, the car/motorcycle was the dominant mode of transport used to arrive at Malvern Hills and Commons. All visitors on a day visit whilst on holiday elsewhere arrived in the area by car (100%) as did 93% of visitors on a day out from home followed by new visitors and non-residents (92% respectively). Residents had the highest level of respondents who had walked on the day of interview (22%).

Similar levels of usage of public transport was seen across the different visitor types.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
Car	86%	82%	93%	100%	88%	74%	92%	92%	85%
Walked	8%	12%	1%	-	5%	21%	2%	3%	9%
Bicycle	2%	2%	-	-	4%	3%	2%	3%	2%
Motorcylce	2%	2%	3%	-	1%	1%	2%	-	2%
Train	1%	0%	1%	-	2%	-	1%	2%	1%
Bus/coach service	1%	1%	-	-	-	1%	1%	-	1%
Other	0%	0%	1%	-	-	-	1%	-	1%

Use of the car was greatest by visitors to Hollybush where 94% had used this method of transport to reach the Malvern Hills and Commons. Least use of the car was at North Quarry Car Park where only two thirds of visitors had arrived by car and 26% had walked.

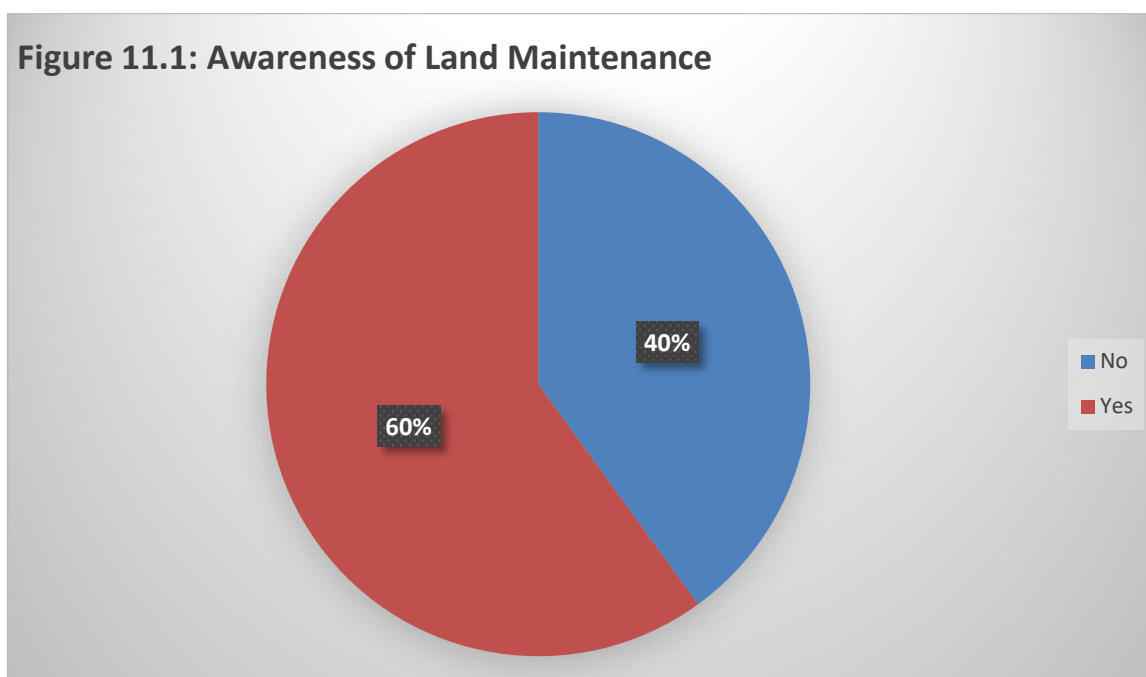
More visitors had arrived at British camp by bicycle than other locations. As with Table 10.1, the use of public transport was fairly low or non-existent across the different locations.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Car	86%	91%	83%	94%	92%	67%
Walked	8%	1%	12%	4%	2%	26%
Bicycle	2%	4%	1%	-	2%	3%
Motorcylce	2%	2%	1%	-	1%	4%
Train	1%	-	3%	-	1%	-
Bus/coach service	1%	1%	-	-	2%	-
Other	0%	1%	-	2%	-	-

11.0 MAINTENANCE OF LAND

11.1 Responsibility for land management

Visitors were asked if they were aware of who is responsible for maintaining the land across the Hills and Commons. No prompts were used to gather this information. There was a fairly high awareness, with six out of ten (60%) of respondents aware of who was responsible for the land maintenance.



Residents (79%), day visitors on a local trip from home (71%) and those who had previously visited (67%) had the greatest awareness across all types of visitors. The high levels of awareness amongst these visitors is more evident due to the proximity of living near to the area and in many cases visiting on multiple occasions.

First-time visitors to Malvern Hills and Commons had the least knowledge of who was responsible for maintaining the land with only a quarter (24%) aware of the organisation.

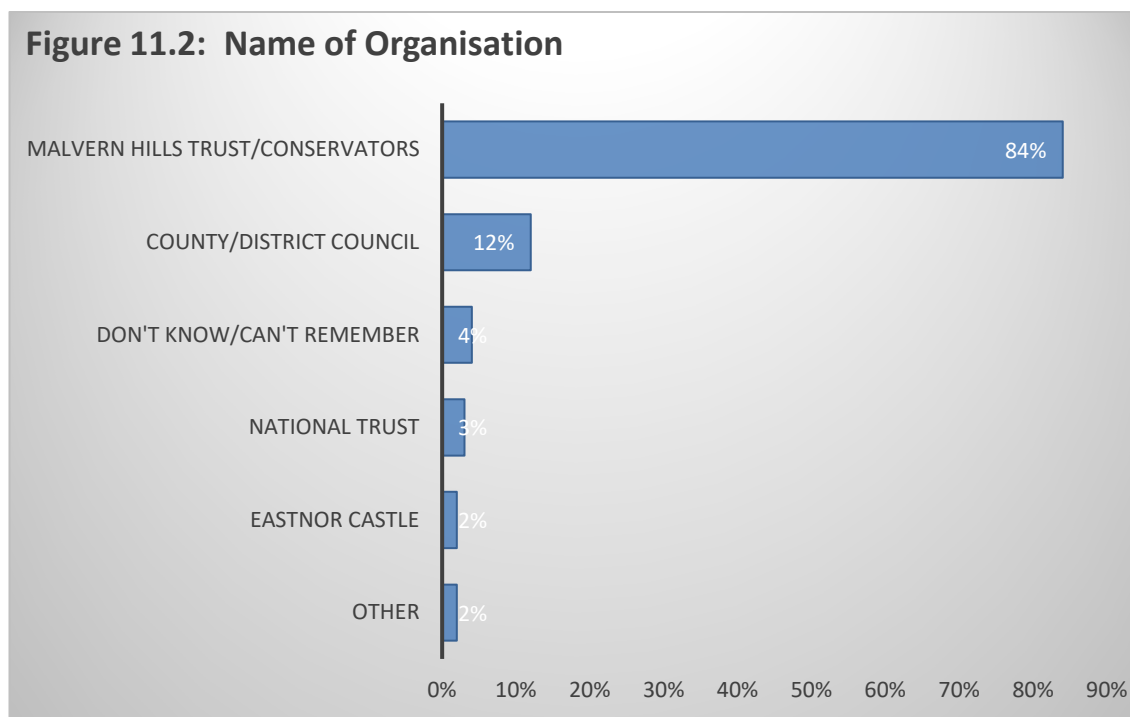
	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
Yes	60%	71%	52%	42%	37%	79%	51%	24%	67%
No	40%	39%	48%	58%	63%	21%	49%	76%	33%

Knowledge of maintaining the land was highest amongst visitors to British Camp (72%) and Hollybush (70%). Visitors to Swinyards Car Park were least aware with just over half (51%) unaware of who was responsible for the Malvern Hills and Commons land.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Yes	60%	72%	54%	70%	49%	62%
No	40%	28%	46%	30%	51%	38%

11.2 Name of Organisation Responsible for Management of Hills and Commons

The 60% who were aware of the organisation responsible for maintaining the land were then asked if they could name the relevant organisation. Over eight out of ten respondents (84%) cited the Malvern Hills Trust/Conservators, followed by much smaller numbers who mentioned the District/County Council (12%), National Trust (3%) and Eastnor Castle (2%). 4% responded that they didn't know or couldn't remember with 1 respondent each, naming: charitable trust, some conservationists and different conservation trusts.



NB: Totals add up to more than 100% as multiple answers could be given.

Across all the different markets, the top response was the Malvern Hills Trust/Conservators. Day visitors whilst on holiday elsewhere were least aware of the name (60%) with County/District Council and the National Trust, notable organisations named by respondents on a holiday or short break staying in the area.

Respondents interviewed at Swinyards Car Park and British Camp gave the top responses for Malvern Hills Trust/Conservators. Across all locations, this was the top answer given by respondents. Both British Camp and Worcestershire Beacon visitors cited the Council/County Council as the main body responsible for land management of the area (15% each).

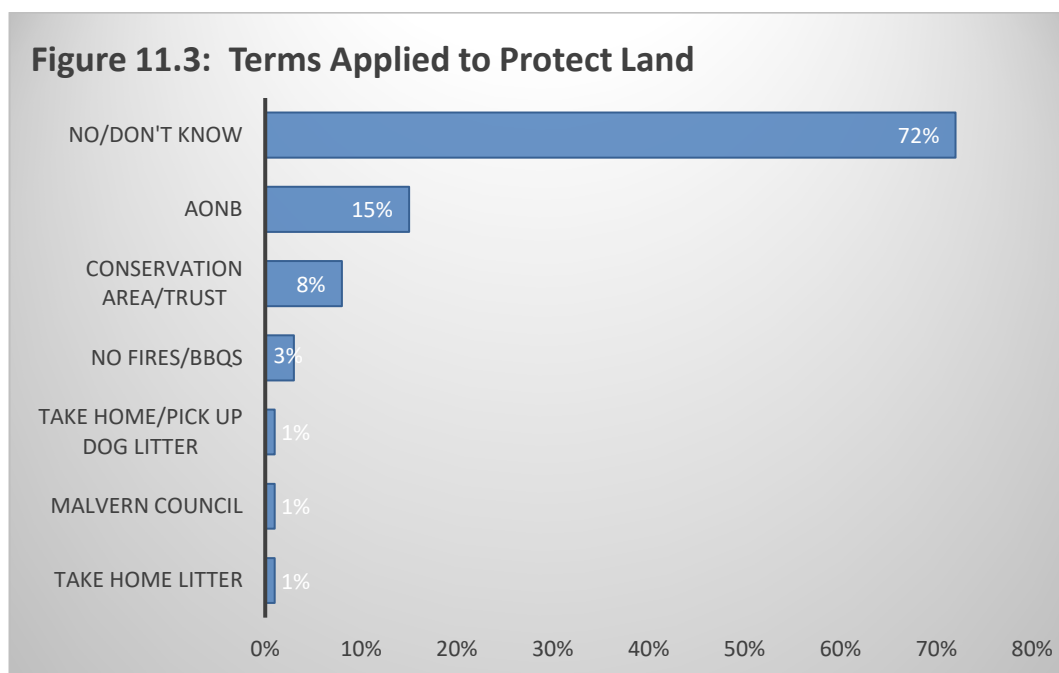
Table 11.3: Responsibility for Land Management by Location

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Malvern Hills Trust/Conservators	84%	86%	83%	80%	87%	81%
Council/County Council	12%	15%	15%	9%	4%	14%
No/Don't Know	4%	-	2%	11%	6%	5%
National Trust	3%	1%	4%	6%	6%	-
Eastnor Castle	2%	-	-	11%	-	-
Other	0%	-	-	-	8%	-

NB: Totals add up to more than 100% as multiple answers could be given.

11.3 Terms that apply to area to protect the land

To help understand the awareness of the area, respondents were then asked if they were also aware of any particular designations or terms that apply to this area or parts of the area to help protect it and could they name any that came to mind.



Almost three quarters (72%) responded with “no/don’t know”. The most notable term mentioned was AONB (15%), followed by Conservation Trust (8%). No fires/BBQ’s, take home dog litter/pick up dog litter, Malvern

Council and take home litter, (1% respectively). Restriction on cyclists, no parking, common law land, Geo Park, Home Office, keep to paths, Site of Scientific Interest, to be respectful of countryside, to be respectful of the environment and certain times you can use it were each mentioned by 1 respondent each.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (staying in area)	Resident	Non-Resident	New	Repeat
No/Don't Know	72%	69%	75%	58%	84%	67%	75%	87%	70%
AONB	15%	17%	14%	17%	10%	19%	13%	6%	16%
Conservation area/trust	8%	11%	7%	8%	-	13%	6%	3%	9%
No fires/BBQ's	3%	2%	6%	8%	2%	1%	4%	2%	3%
Take home dog litter/pick up dog litter	1%	1%	4%	-	1%	-	2%	-	2%
Malvern Council	1%	1%	-	-	1%	1%	1%	-	1%
Take home litter	1%	0%	3%	-	1%	-	1%	-	1%
Other	0%	0%	-	8%	1%	2%	0%	2%	1%

There was more awareness of terms that applied to the area to protect the land, by residents of Malvern Hills and Commons (33%) compared with non-residents (25%). This was the same for day visitors whilst on holiday elsewhere (38%) and respondent on a local trip from home (31%). Knowledge from previous visits and those who live close to the area may account for their awareness of terms that apply to help protect the land across the Malvern Hills and Commons. New visitors (6%) were less aware of the term AONB than any other market.

Hollybush visitors had the most knowledge of terms applied to protect the land with 50% citing the term AONB, much higher than visitors to any other location. In complete contrast, least awareness was at Worcestershire Beacon, where over eight out of ten respondents (85%) said they did not know of any terms and only 4% mentioned the AONB. A fifth (21%) of visitors to North Quarry Park made note that the Hills and Commons was a conservation area whilst Swinyards Car Park cited that you could not light fires/BBQ's on the hills and commons (11%).

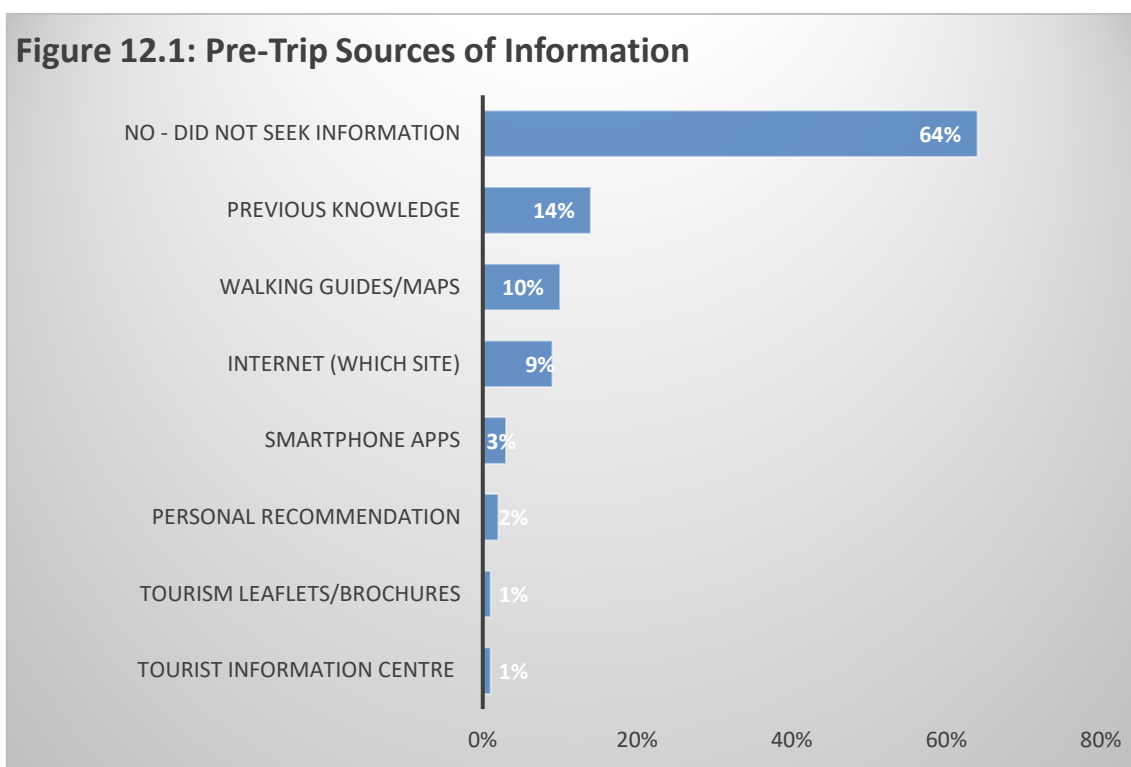
	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
No/Don't Know	72%	68%	85%	48%	78%	70%
AONB	15%	22%	4%	50%	6%	6%
Conservation area/trust	8%	9%	5%	2%	5%	21%
No fires/BBQ's	3%	-	1%	-	11%	-
Take home dog litter/pick up dog litter	1%	-	2%	-	4%	-
Malvern Council	1%	-	2%	-	-	3%
Take home litter	1%	-	2%	-	2%	-
Other	0%	1%	2%	2%	7%	3%

12.0 SOURCES OF INFORMATION

12.1 Pre-trip Planning Sources of Information

Survey respondents were shown a ‘Show Card’ and asked if they had used any sources of information listed when planning their trip. Respondents were asked if they had used any forms of pre-trip information for planning. Overall, just under two thirds had not used any information in planning their trip. Previous knowledge was the top response by those visitors who gave a response to the type of information used, followed by walking guides maps (10%) and the Internet (9%).

Figure 12.1: Pre-Trip Sources of Information



Use of both traditional literature and technology was more evident amongst respondents who were on a day visit whilst on holiday elsewhere, those on a first time visit and respondents who came from further afield. 17% of visitors on a day out from home used the internet to source information prior to their trip, rising to 35% for those respondents in the area for the very first time. Social media such as Facebook and Twitter were hardly used by any visitor type.

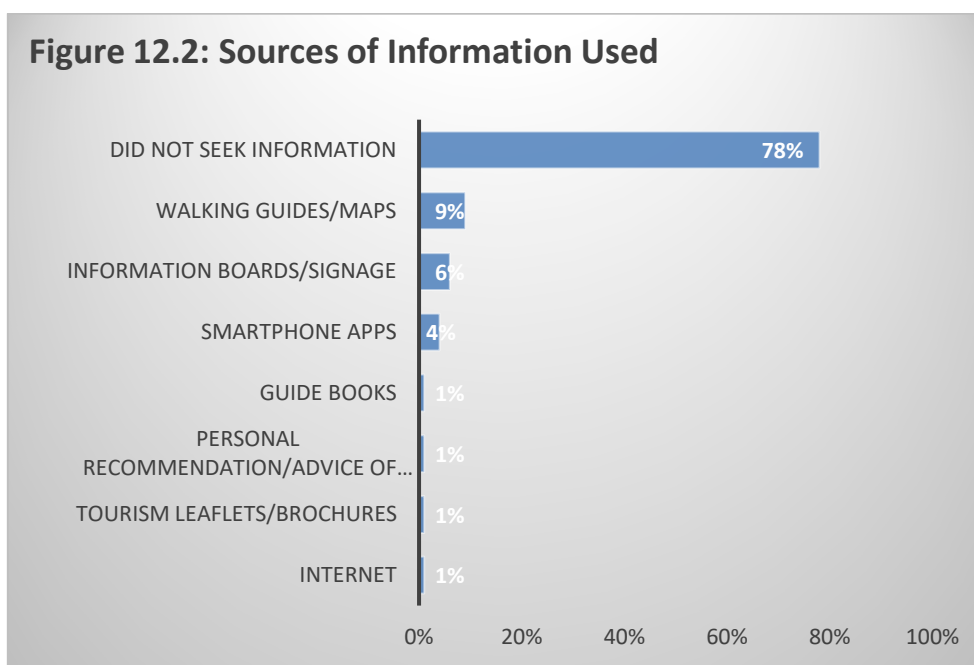
Use of pre-trip information was mixed across all location sites. North Quarry and Swinyard’s Car Park sites made very little use of pre-trip information but the high number of respondents from in and around the area could account for this. In contrast, Hollybush used a variety of pre-trip information when planning their trip from previous knowledge 40%, walking guides/maps (26%) and the Internet (22%).

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
No - did not see information	64%	76%	52%	33%	44%	80%	57%	29%	71%
Previous knowledge as visited before	14%	15%	13%	8%	10%	19%	11%	-	16%
Walking guides/maps	10%	6%	16%	8%	17%	-	15%	25%	7%
Internet	9%	2%	17%	33%	20%	1%	13%	35%	4%
Smartphone Apps	3%	1%	5%	17%	5%	1%	4%	6%	2%
Personal recommendation	2%	1%	-	-	6%	-	2%	6%	1%
Tourism leaflets/brochures	1%	-	-	-	6%	-	2%	8%	-
Tourist Information Centre	1%	0%	3%	-	1%	-	1%	3%	1%
Social Media (FB and Twitter)	0%	0%	1%	-	-	1%	0%	-	1%
Other	0%	0%	1%	-	-	-	1%	2%	0%
Accommodation Provider	0%	-	-	-	1%	-	0%	2%	-

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
No - did not see information	64%	62%	62%	14%	80%	83%
Previous knowledge as visited before	14%	12%	18%	40%	4%	6%
Walking guides/maps	10%	8%	13%	26%	8%	1%
Internet	9%	12%	4%	22%	4%	10%
Smartphone Apps	3%	2%	2%	8%	4%	-
Personal recommendation	2%	5%	-	-	2%	-
Tourism leaflets/brochures	1%	1%	1%	2%	1%	1%
Tourist Information Centre	1%	-	4%	-	-	-
Social Media (FB and Twitter)	0%	-	1%	-	1%	-
Other	0%	-	-	4%	-	-
Accommodation Provider	0%	1%	-	-	-	-

12.2 Use of information whilst in Malvern Hills and Commons

Respondents were then asked if they had accessed any forms of information whilst in the area. Overall, the majority (78%) of visitors indicated that they had not accessed any sources of information, only 22% had.



The majority of visitors across the different markets did not source any type of information once arriving in the area, with, not surprisingly, the highest with 98% of all visitors was residents who had not used any information on their visit.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
No - did not seek any information	78%	89%	64%	58%	57%	98%	68%	46%	83%
Walking guides/maps	9%	4%	19%	8%	18%	-	14%	22%	7%
Information boards/signage	6%	5%	7%	17%	6%	1%	8%	11%	5%
Smartphone Apps	4%	1%	7%	17%	10%	-	6%	14%	2%
Guide books	1%	0%	1%	-	5%	-	2%	3%	1%
Personal recommendation/advice of local resident	1%	1%	3%	-	1%	1%	1%	2%	1%
Tourism leaflets/brochures	1%	-	1%	-	4%	-	1%	5%	0%
Internet	1%	0%	1%	-	1%	-	1%	2%	1%
Other	0%	0%	1%	-	-	-	1%	2%	0%

Day visitors whilst on holiday elsewhere used Smartphone Apps and information boards/signage (17% each) when in the area, whilst use of walking guides/maps were used by 22% of new visitors, those on a day out from home and 18% of respondents who were on a holiday or short break in the area.

Generally, use of information pre and during the trip was relatively small with many visitors on a returning visit or local to the area and county and did not need to access information whilst on their trip.

Use of the internet was fairly low but consistent with 1-2% usage across all markets

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
No - did not seek any information	78%	79%	74%	40%	87%	94%
Walking guides/maps	9%	11%	4%	40%	3%	1%
Information boards/signage	6%	6%	12%	2%	5%	-
Smartphone Apps	4%	2%	3%	18%	1%	4%
Guide books	1%	1%	2%	-	3%	-
Personal recommendation/advice of local resident	1%	2%	-	4%	1%	-
Tourism leaflets/brochures	1%	-	2%	-	1%	1%
Internet	1%	-	3%	-	-	-
Other	0%	-	1%	2%	-	-

As with pre-trip information usage, visitors to Hollybush made more use of information than any other visitor, with only 40% not accessing any information sources when in the area – compared with 94% at North Quarry Car Park. Four out of ten (40%) of visitors to Hollybush had used a walking guide/map whilst in the area and 18% had used their Smartphone App, much higher than any other location.

13.0 EVALUATIONS AND RATINGS – ASPECT OF VISIT

13.1 Rating of Statements

Respondents were asked to comment on a series of statements concerning aspects of facilities within the area. This covered, litter clearance, parking, signage and expectation of their visit. Overall, there were positive satisfaction ratings given by visitors to the area. The highest (mean) score out of five was given for the management of the countryside (habitats/landscapes), 4.72 with 98% rating it good/very good. The lowest scores recorded were for public toilets (3.28) and picnic sites (3.78).

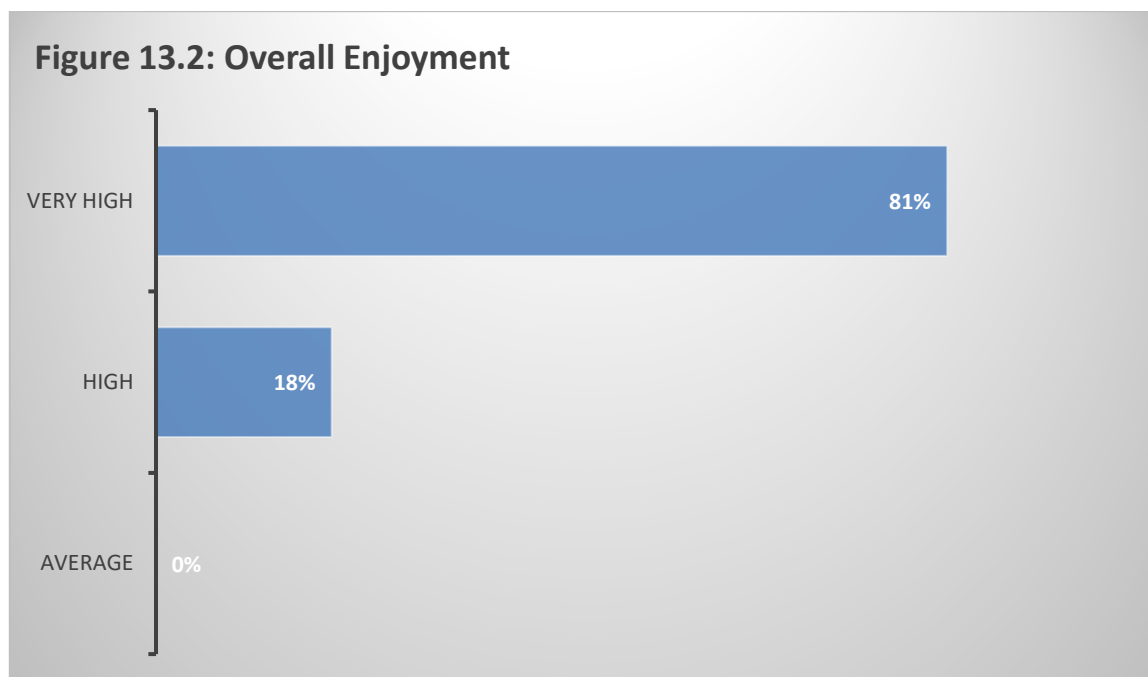
Table 13.1: Satisfaction Scores						
	Mean Score	Very Good	Good	Neither	Poor	Very Poor
Litter clearance	4.51	55%	42%	3%	0%	-
Parking availability generally	4.55	62%	33%	4%	1%	0%
Traffic conditions	4.56	61%	34%	4%	0%	-
Signposting (roads)	4.19	44%	34%	18%	3%	0%
Footpath quality/management	4.63	66%	32%	1%	1%	-
Management of the countryside (habitats/landscapes)	4.72	75%	23%	1%	0%	0%
Public toilets	3.28	27%	23%	22%	15%	13%
Picnic sites	3.78	32%	32%	20%	14%	2%
Interpretation/countryside/visitor information/boards/leaflets	4.12	41%	35%	2%	4%	-
	Mean Score	Very Quiet	Quiet	Average	Busy	Very Busy
Overall volume of people, cars and coaches today in the area	3.67	24%	33%	29%	14%	-
	Mean Score	Very Satisfied	Satisfied	No Real View	A little Dissatisfied	Very Dissatisfied
How has the number of people and traffic affected your satisfaction with this visit?	4.11	42%	27%	30%	1%	-

The volume of people, cars and coaches in the area was quiet/very quiet for over half of all respondents (57%) with almost three out of ten respondents (29%) stating it was average.

Respondents were asked if the number of people and traffic had affected their satisfaction with their visit on this occasion. Overall, 42% were very satisfied and a further 27% satisfied. A further 30% had no real view on the affect people and traffic had on their visit. A full breakdown of satisfaction scores by type of visitor and location is shown in Appendix 6.

13.2 Overall Enjoyment of Visit

All visitors indicated their overall enjoyment of their visit to Malvern Hills and Commons. The overall mean score of 4.81 out of 5.0 indicates a high level of enjoyment. Eight out of ten (81%) felt it was ‘very high’ with a further 18% noting it to be ‘high’; combined a 99% positive rating. Less than 1% gave an average rating and no one gave a negative low level of enjoyment.



Residents of Malvern Hills and Commons rated their overall enjoyment very high (89%) with a mean score of 4.88. The high scores received is encouraging from those who use the Hills and Commons on a regular basis. Across all the different visitor types, overall enjoyment was extremely high.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
Mean Score	4.81	4.86	4.73	4.58	4.76	4.88	4.77	4.65	4.83
Very High	81%	86%	73%	58%	76%	89%	77%	65%	84%
High	18%	13%	27%	42%	24%	10%	22%	35%	15%
Average	0%	1%	-	-	-	1%	0%	-	1%
Low	-	-	-	-	-	-	-	-	-
Very Low	-	-	-	-	-	-	-	-	-

Repeat visitors gave higher satisfaction ratings for their overall enjoyment (84% very high), compared with first time visitors (65% very high).

Worcestershire Beacon had the highest satisfaction score for overall enjoyment, with 86% rating it very high and 14% high – a combined score of 100%.

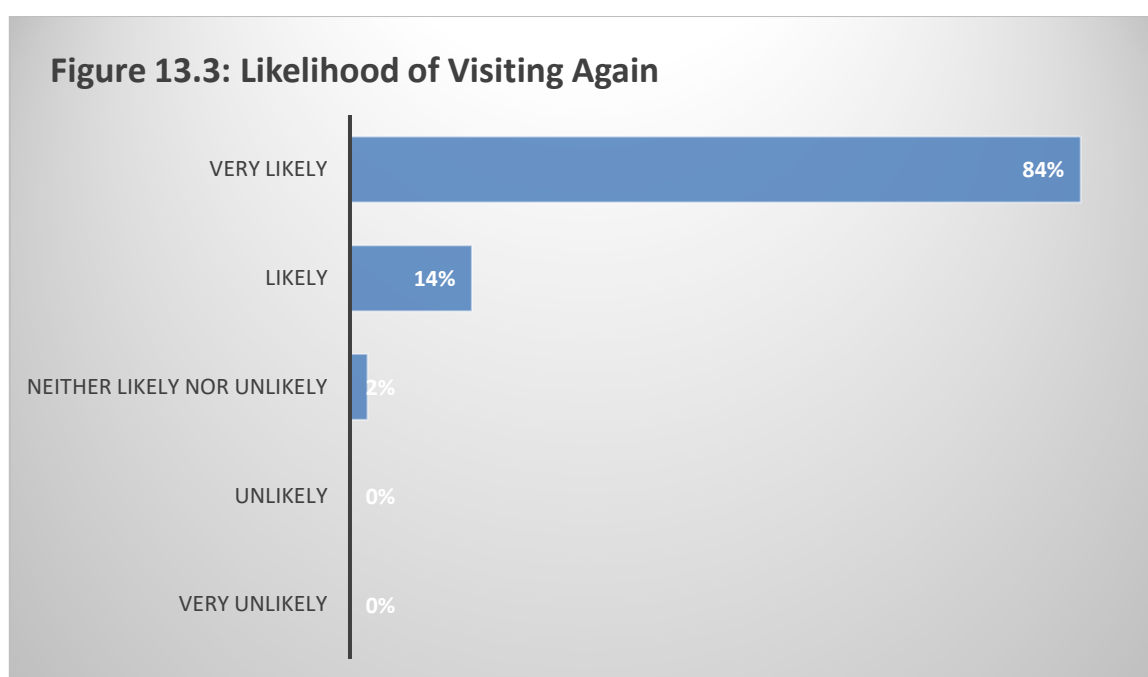
Across all location sites, the levels of enjoyment were positive, with 4.75 the lowest at Swinyards Car Park, but still a very encouraging score.

Table 13.3: Overall Enjoyment by Location (426)

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Mean Score	4.81	4.81	4.86	4.82	4.75	4.80
Very High	81%	83%	86%	82%	75%	80%
High	18%	15%	14%	18%	25%	20%
Average	0%	2%	-	-	-	-
Low	-	-	-	-	-	-
Very Low	-	-	-	-	-	-

13.3 How Likely to Visit Again

The majority of visitors would make a return visit to Malvern Hills & Commons with 98% “very likely/quite likely” to return. The high level of satisfaction along with 85% of respondents who have visited before, may contribute to the high scores given.



As with overall enjoyment, the mean scores across all types were very positive and all above 4 rating. Excluding residents with a mean score of 4.92 and 92% who are likely to visit again, locals on a day trip from home, those on a day out from home and visitors on a repeat visit were very likely to visit again (89% respectively). New visitors were the least likely to make a return visit out of all visitors, with 10% neither likely nor unlikely to return to Malvern Hills and Commons.

Table 13.4: Likelihood of Visiting Again by Type of Visitor (426)

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
Mean Score	4.81	4.88	4.87	4.50	4.56	4.92	4.75	4.43	4.87
Very Likely	84%	89%	89%	67%	63%	92%	80%	52%	89%
Quite Likely	14%	10%	9%	17%	29%	8%	17%	38%	10%
Neither Likely nor Unlikely	2%	-	-	17%	7%	-	3%	10%	1%
Unlikely	0%	-	1%	-	-	-	0%	-	0%
Very Unlikely	0%	0%	-	-	-	-	0%	-	0%

The positive scores continued by location with visitors to Worcestershire Beacon very likely (87%) and quite likely (13%) to visit again with a mean score of 4.87. As with overall enjoyment, only 80% of visitors interviewed at Swinyards Car Park would be very likely to return – still a positive score and should be taken in the context of the overall scores shown.

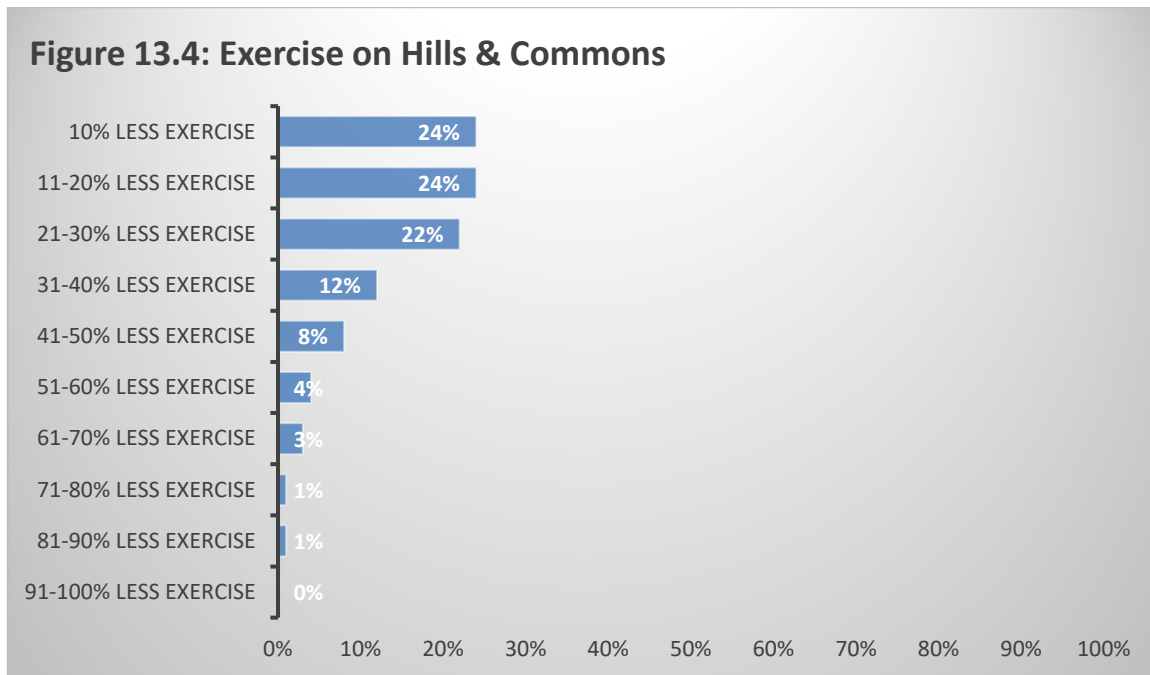
Table 13.5: Likelihood of Visiting Again by Location (426)

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Mean Score	4.81	4.78	4.87	4.86	4.74	4.83
Very Likely	84%	81%	87%	86%	80%	87%
Quite Likely	14%	16%	13%	14%	16%	9%
Neither Likely nor Unlikely	2%	3%	-	-	2%	4%
Unlikely	0%	-	-	-	1%	-
Very Unlikely	0%	-	-	-	1%	-

13.4 Exercise Habits

Respondents were asked would they exercise as much if the Malvern Hills & Commons were not there and if not how much less they estimated they would exercise. Almost half (48%) would exercise between 10 and 20% less if the Malvern Hills and Commons were not there for them to take part in exercise, a fairly significant proportion of

visitors. Much smaller numbers indicated they would exercise less ranging from 3% who would exercise between 61-70% less and 71-80% and 81-90% who stated they would exercise less by 1% respectively.



The percentage of people who would exercise less if the hills and commons were not there varied across all markets. Most impact was with seen amongst visitors on a local trip from home or a day out from home, repeat and residents of Malvern Hills and Commons.

Table 13.6: Exercise Habits by Type of Visitor (426)

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
10% less exercise	24%	17%	49%	50%	50%	8%	39%	57%	22%
11-20% less exercise	24%	25%	20%	-	25%	23%	25%	29%	24%
21-30% less exercise	22%	23%	11%	50%	20%	21%	22%	14%	22%
31-40% less exercise	12%	15%	3%	-	5%	16%	9%	-	13%
41-50% less exercise	8%	9%	11%	-	-	15%	3%	-	9%
51-60% less exercise	4%	6%	-	-	-	9%	-	-	5%
61-70% less exercise	3%	3%	3%	-	-	5%	1%	-	3%
81-90% less exercise	1%	1%	-	-	-	2%	-	-	1%
71-80% less exercise	1%	1%	-	-	-	2%	1%	-	1%
91-100% less exercise	0%	-	3%	-	-	1%	-	-	0%

Across all locations, the impact on the exercise undertaken by visitors and residents and subsequently their well being would be affected if the Malvern Hills and Commons were not available for them to use.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
10% less exercise	24%	7%	32%	39%	29%	10%
11-20% less exercise	24%	45%	18%	29%	21%	16%
21-30% less exercise	22%	16%	31%	-	28%	16%
31-40% less exercise	12%	14%	10%	25%	9%	12%
41-50% less exercise	8%	11%	6%	-	6%	18%
51-60% less exercise	4%	2%	3%	-	2%	14%
61-70% less exercise	3%	2%	-	7%	1%	6%
81-90% less exercise	1%	2%	-	-	-	2%
71-80% less exercise	1%	-	-	-	1%	4%
91-100% less exercise	0%	-	-	-	1%	-

14.0 LIKE/SPOILT VISIT TO AREA

14.1 What Visitors Liked

Respondents were asked what it was they particularly liked about their visit to the area. For over half of visitors (48%), the beautiful/pretty/great views was their top comment, followed by walking and exercise (24%) and quiet/peaceful/tranquil nature of the area and how picturesque/scenic it was (19% each). Many comments were made by visitors and a full list is shown in Appendix 6.

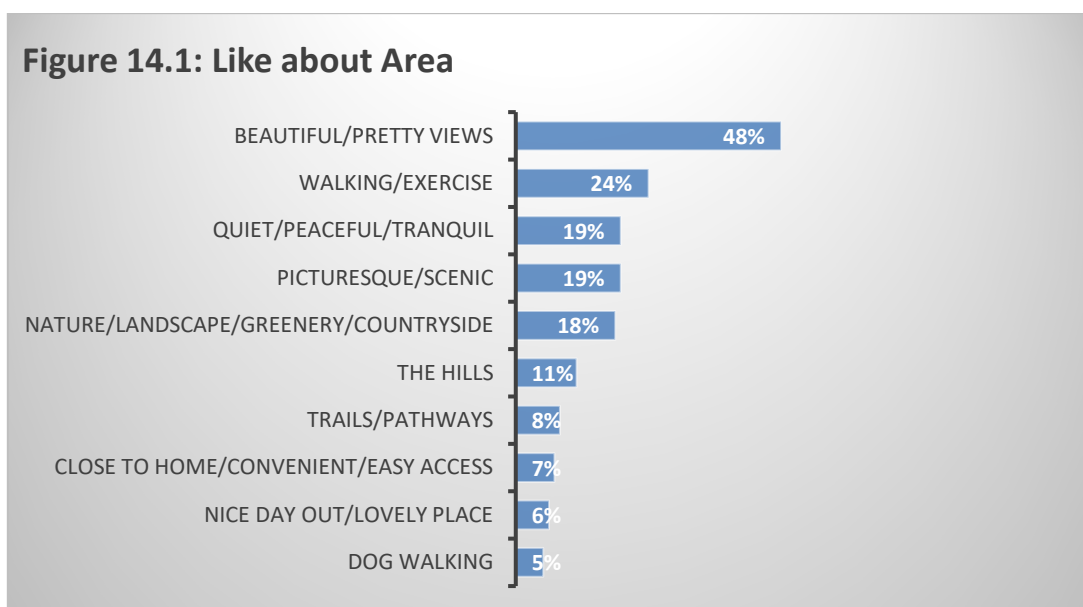


Table 14.1: Like About Area by Type of Visitor (426)

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
Beautiful views/great views	48%	43%	49%	42%	62%	42%	51%	62%	45%
Walking/exercise	24%	23%	28%	33%	21%	30%	21%	16%	25%
Quiet/peaceful/tranquil	19%	16%	20%	25%	27%	12%	22%	24%	18%
Scenery/scenic/picturesque	19%	17%	19%	25%	22%	14%	21%	22%	18%
Nature/landscape/greenery/countryside	18%	16%	16%	-	28%	15%	20%	25%	17%
Hills	11%	12%	12%	17%	5%	9%	12%	3%	12%
Pathways/paths/trails	8%	8%	9%	8%	6%	7%	8%	6%	8%
Convenience/location/close to home/easy access	7%	9%	5%	-	2%	11%	5%	-	8%
Nice day out/lovely place to come/nice area	6%	6%	7%	8%	6%	2%	8%	13%	5%
Dog walking	5%	5%	4%	-	5%	6%	4%	5%	5%

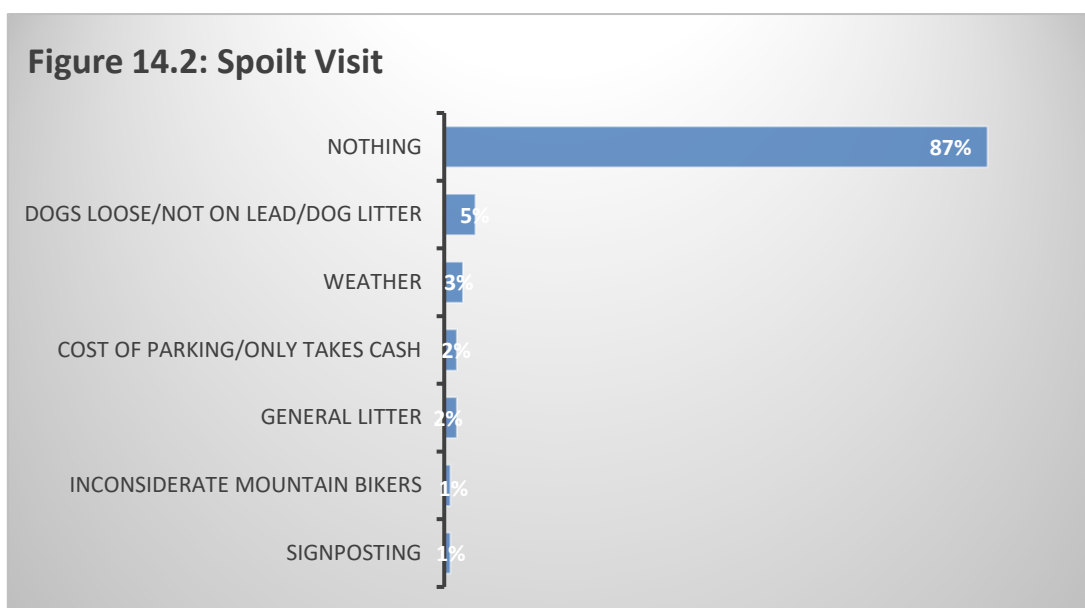
For overnight visitors and those on a first visit, the beautiful views was their most liked aspect of their visit to the area (62% each). This comment was the top response across all the different markets. Using the hills and commons for walking and exercise was most popular with day visitors whilst on holiday elsewhere (33%), residents of the area (30%), those on a day out from home (28%) and returning visitors (25%). The nature/landscape/greenery/countryside was liked by visitors staying overnight – 28%, more than any other visitor. In general, the beauty of the outdoors was evident to see across all the comments noted.

	Total	British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Beautiful views/great views	48%	58%	49%	60%	41%	32%
Walking/exercise	24%	15%	18%	12%	25%	20%
Quiet/peaceful/tranquil	19%	29%	12%	12%	16%	19%
Scenery/scenic/picturesque	19%	16%	8%	44%	25%	13%
Nature/landscape/greenery/countryside	18%	1%	1%	6%	6%	-
Hills	11%	9%	4%	6%	2%	-
Pathways/paths/trails	8%	7%	3%	4%	3%	-
Convenience/location/close to home/easy access	7%	2%	4%	-	-	-
Nice day out/lovely place to come/nice area	6%	23%	26%	24%	13%	39%
Dog walking	5%	3%	1%	-	1%	1%

As with type of visitor, the top response across all location sites was the beautiful and great views. This ranged from 32% by respondents at North Quarry Car Park to 60% at Hollybush. Other notable comments were the scenery at Hollybush (44%) and the quiet/peaceful and tranquil nature at British Camp (29%).

14.2 Spoilt Visit to Area

Very few visitors had negative comments to make about their visit, with 87% stating that nothing had spoilt their visit to Malvern Hills and Commons. The small number who did have issues during their visit cited loose dogs not on leads, more dog litter bins and people who left behind dog litter, 5% of respondents. Other comments included; weather, cost of parking and only takes cash, litter, mountain bikers/cyclists inconsiderate and signposting. A full list is shown in Appendix 8.



Across all visitor types, very few made a comment about spoiling their visit. Dogs not on leads/dog litter/poo bins was more of an issue for visitors on a day visit whilst staying elsewhere on holiday.

	Total	Local Trip from Home	Day Out from Home	Day Visit Whilst on Holiday Elsewhere	Holiday or Short Break (in area)	Resident	Non-Resident	New	Repeat
Nothing/None/No	87%	89%	84%	75%	84%	88%	86%	84%	87%
Dogs off lead/loose dogs/dog litter/more poo bins	5%	3%	4%	17%	9%	3%	6%	8%	4%
Weather	3%	2%	7%	-	2%	4%	2%	5%	2%
Cost of parking very high/too much if only parking for short time/only takes cash	2%	2%	3%	8%	2%	-	3%	3%	2%
Litter	2%	2%	-	-	2%	1%	2%	-	2%
Mountain bikers/cyclists that are inconsiderate	1%	2%	1%	-	-	4%	0%	-	2%
Signposting	1%	2%	-	-	-	1%	1%	-	1%
Footpaths need repair	0%	0%	1%	-	-	1%	-	-	1%
Cows damaging footpaths	0%	-	-	-	1%	-	0%	-	0%
Road surface	0%	-	1%	-	-	-	0%	-	0%
Tea shop needs celiac and nut free items	0%	-	1%	-	-	-	0%	-	0%
Busy traffic	0%	0%	-	-	-	1%	-	-	0%
Bracken rolled when birds nesting	0%	0%	-	-	-	-	0%	-	0%

Appendices

Appendix 1: Questionnaire

MALVERN HILLS AND COMMONS VISITOR SURVEY 2018

SITE		Day of Week				Time	
British Camp	1	Monday	1	Friday	5	0730-0900	1
Worcestershire Beacon	2	Tuesday	2	Saturday	6	0901-1100	2
Hollybush	3	Wednesday	3	Sunday	7	1101-1300	3
Swinyards Car Park	4	Thursday	4	Bank Holiday	8	1301-1500	4
North Quarry Car Park	5					1501-1700	5
						1701-1930	6

Good morning/afternoon. I am from The Research Solution. We are conducting a survey of visitors to **MALVERN HILLS AND COMMONS**. It should only take a few minutes. Would you be willing to take part?

Q1	Could you please tell me where you normally live?	Routing
	County/Country	Continue
	Postcode (this must be obtained as we need for mapping purposes)	

Q2	Which of the following best describes your visit to the Malvern Hills area today? (SHOWCARD 1 – ONE RESPONSE ONLY)	Routing
	Local trip from home	<input type="checkbox"/> 1
	Day out from home	<input type="checkbox"/> 2
	Day visit while on holiday elsewhere	<input type="checkbox"/> 3
	Holiday or short break (staying only in area)	<input type="checkbox"/> 4

Q3	What is your primary reason for coming to the area today and for what other reasons are you visiting? (SHOWCARD 2 AND MAP 1)	Routing
	Primary Reason – (Select ONE only)	Other Reasons - (Tick ANY that apply)
	Walking	<input type="checkbox"/> 1
	Dog Walking	<input type="checkbox"/> 2
	Running	<input type="checkbox"/> 3
	Mountain biking	<input type="checkbox"/> 4
	Other outdoor activity (please specify)	<input type="checkbox"/> 5
	General Countryside visit	<input type="checkbox"/> 6
	To enjoy the view	<input type="checkbox"/> 7
	To meet family/friends	<input type="checkbox"/> 8
	Recommendation from others	<input type="checkbox"/> 9
	New place to come to/not been before	<input type="checkbox"/> 10
	For exercise, health and wellbeing	<input type="checkbox"/> 11
	Variety of things to see and do	<input type="checkbox"/> 12
	Easy to get to/close by	<input type="checkbox"/> 13
	Peace and quiet	<input type="checkbox"/> 14
	Just passing through	<input type="checkbox"/> 15
	Enjoyed a previous visit/been before	<input type="checkbox"/> 16
	Visit attraction/location	<input type="checkbox"/> 17
	Visit event	<input type="checkbox"/> 18
	Refreshments	<input type="checkbox"/> 19
	Educational visit	<input type="checkbox"/> 20
	Other (please specify)	<input type="checkbox"/> 21

Q4	Have you ever been into the Malvern Hills area highlighted on the map before? (MAP 1)	Routing
	Yes <input type="checkbox"/> 1	Continue
	No <input type="checkbox"/> 2	

Q5	Including today, how many times have you visited the area in the past 12 months for the purpose of your primary activity today? How many times have you visited the area in the past 12 months in total?			Routing
	Primary activity – past 12 months		Total no. visits - Past 12 Months	Continue
	Daily <input type="checkbox"/> 1	Daily <input type="checkbox"/> 1		
	Weekly <input type="checkbox"/> 2	Weekly <input type="checkbox"/> 2		
	Monthly <input type="checkbox"/> 3	Monthly <input type="checkbox"/> 3		
	Annually <input type="checkbox"/> 4	Annually <input type="checkbox"/> 4		
	Other <input type="checkbox"/> 5	Other <input type="checkbox"/> 5		

Q6	What time did you arrive in the area and how long will you stay in the area?	Routing
	Arrival time <input type="text"/> Departure time (estimated) <input type="text"/>	Continue

Q7	What was the MAIN mode of transport you used to reach the area today?			Routing
	Car <input type="checkbox"/> 1	Train <input type="checkbox"/> 5	Continue	
	Motorcycle <input type="checkbox"/> 2	Walked <input type="checkbox"/> 6		
	Bus/coach service <input type="checkbox"/> 3	Other (please specify) <input type="checkbox"/> 7		
	Bicycle <input type="checkbox"/> 4			

Q8	Are you aware who is responsible for maintaining the land across the Hills and Commons?	Routing
	Yes <input type="checkbox"/> 1	Go to Q9
	No <input type="checkbox"/> 2	Go to Q10

Q9	If yes, do you know the name of the organisation?	Routing
	<input type="text"/>	Continue

Q10	Are you aware of any particular designations or terms that apply to this area or parts of this area and help to protect it? If so, please name them?	Routing
	<input type="text"/>	Continue

Q11	In planning this trip, did you use any sources of information?			Routing
	NO – did not seek information <input type="checkbox"/> 1	Personal recommendation <input type="checkbox"/> 7	Continue	
		Tourism leaflets/brochures <input type="checkbox"/> 8		
	Previous knowledge as visited before <input type="checkbox"/> 2	Accommodation provider <input type="checkbox"/> 9		
	Walking guides / maps <input type="checkbox"/> 3	Tourist Information Centre <input type="checkbox"/> 10		
	Smartphone Apps <input type="checkbox"/> 4	Other (please specify) <input type="checkbox"/> 11 Which specific sites/apps/ leaflet etc. did you use (please specify)		
	Internet <input type="checkbox"/> 5			
	Social Media (Facebook/Twitter) <input type="checkbox"/> 6			

Q12	Did you access any information whilst in the area?			Routing
	NO – did not seek information <input type="checkbox"/> 1	Guide Books <input type="checkbox"/> 6	Continue	
	Personal recommendation / advice of local resident <input type="checkbox"/> 2	Tourism leaflets/Brochures <input type="checkbox"/> 7		
	Walking guides / maps <input type="checkbox"/> 3	Information boards/signage <input type="checkbox"/> 8		
	Smartphone Apps <input type="checkbox"/> 4	Other (please specify) <input type="checkbox"/> 9		
	Internet <input type="checkbox"/> 5			

Q13	If you have noticed or used any of the following local facilities, please indicate your satisfaction using the following scale (SHOWCARD 3)							Routing
		Very Poor	Poor	Neither poor nor good	Good	Very Good	N/A	Continue
	Litter clearance	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Parking availability generally	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Traffic conditions	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Signposting (roads)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Footpath quality/management	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Management of the countryside (habitats/landscapes)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Public toilets	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Picnic sites	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
	Interpretation/countryside/visitor information/boards/leaflets	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	

Q14	Using the following satisfaction scale (SHOWCARD 4) how would you rate the following:						Routing
		Very busy	Busy	Average	Quiet	Very Quiet	Continue
	Overall volume of people, cars and coaches today in the area?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	
Q15	And please rate the following						
		Very Dissatisfied	A Little dissatisfied	No Real View	Satisfied	Very Satisfied	Continue
	How has the number of people and traffic affected your satisfaction with this visit?	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	

Q16	Would you exercise as much if the Malvern Hills and Commons were not here? If not, how much less do you estimate would you exercise?						Routing
	10%	<input type="checkbox"/> 1	51-60%			<input type="checkbox"/> 6	Continue
	11-20%	<input type="checkbox"/> 2	61-70%			<input type="checkbox"/> 7	
	21-30%	<input type="checkbox"/> 3	71-80%			<input type="checkbox"/> 8	
	31-40%	<input type="checkbox"/> 4	81-90%			<input type="checkbox"/> 9	
	41-50%	<input type="checkbox"/> 5	91-100%			<input type="checkbox"/> 10	

Q17	What do you particularly like about the area?						Routing
							Continue

Q18	What, if anything, spoilt your visit to the area today?						Routing
							Continue

Q19	How would you rate the overall enjoyment of your visit to the Malvern Hills and Commons area?						Routing
	Very High	<input type="checkbox"/> 5	Low			<input type="checkbox"/> 2	Continue
	High	<input type="checkbox"/> 4	Very Low			<input type="checkbox"/> 1	
	Average	<input type="checkbox"/> 3					

Q20	How likely are you to visit again?				Routing
	Very likely	<input type="checkbox"/> 5	Unlikely	<input type="checkbox"/> 2	Continue
	Quite likely	<input type="checkbox"/> 4	Very unlikely	<input type="checkbox"/> 1	
	Neither likely nor unlikely	<input type="checkbox"/> 3	Don't Know	<input type="checkbox"/> 6	

Q21	Which of the following (SHOWCARD 5) best describes the party you visited the area with today?				Routing
	By yourself	<input type="checkbox"/> 1	With friends	<input type="checkbox"/> 4	Continue
	With your partner only	<input type="checkbox"/> 2	With friends and family	<input type="checkbox"/> 5	
	With your family	<input type="checkbox"/> 3	With an organised group or coach party (including events)	<input type="checkbox"/> 6	

Q22	Including yourself, how many in your immediate party are male/female and looking at the card provided, in what age groups are they? (SHOWCARD 6) – Write in numbers			
	AGE	Male (No.)	Female (No.)	Continue
	0 – 9 years			
	10 –14 years			
	15 – 18 years			
	19 - 24 years			
	25 – 34 years			
	35 – 44 years			
	45 – 54 years			
	55 – 64 years			
	65 -74 years			
	75+ years			
	Part of a Coach Party			

Q23	Which of the following categories applies to the chief income earner in your household? (SHOWCARD 7)				Routing
	Employed full-time (30+ hrs per week)	<input type="checkbox"/> 1	Full-time student	<input type="checkbox"/> 6	CODE C1
	Employed part-time (8-29 hrs per week)	<input type="checkbox"/> 2	Unemployed over 6 months	<input type="checkbox"/> 7	
	Self-employed	<input type="checkbox"/> 3	Retired with state pension only	<input type="checkbox"/> 8	CODE DE
	Retired with company/private pension	<input type="checkbox"/> 4	Working less than 8 hrs per week	<input type="checkbox"/> 9	
	Unemployed – less than 6 months	<input type="checkbox"/> 5	Refused	<input type="checkbox"/> 10	

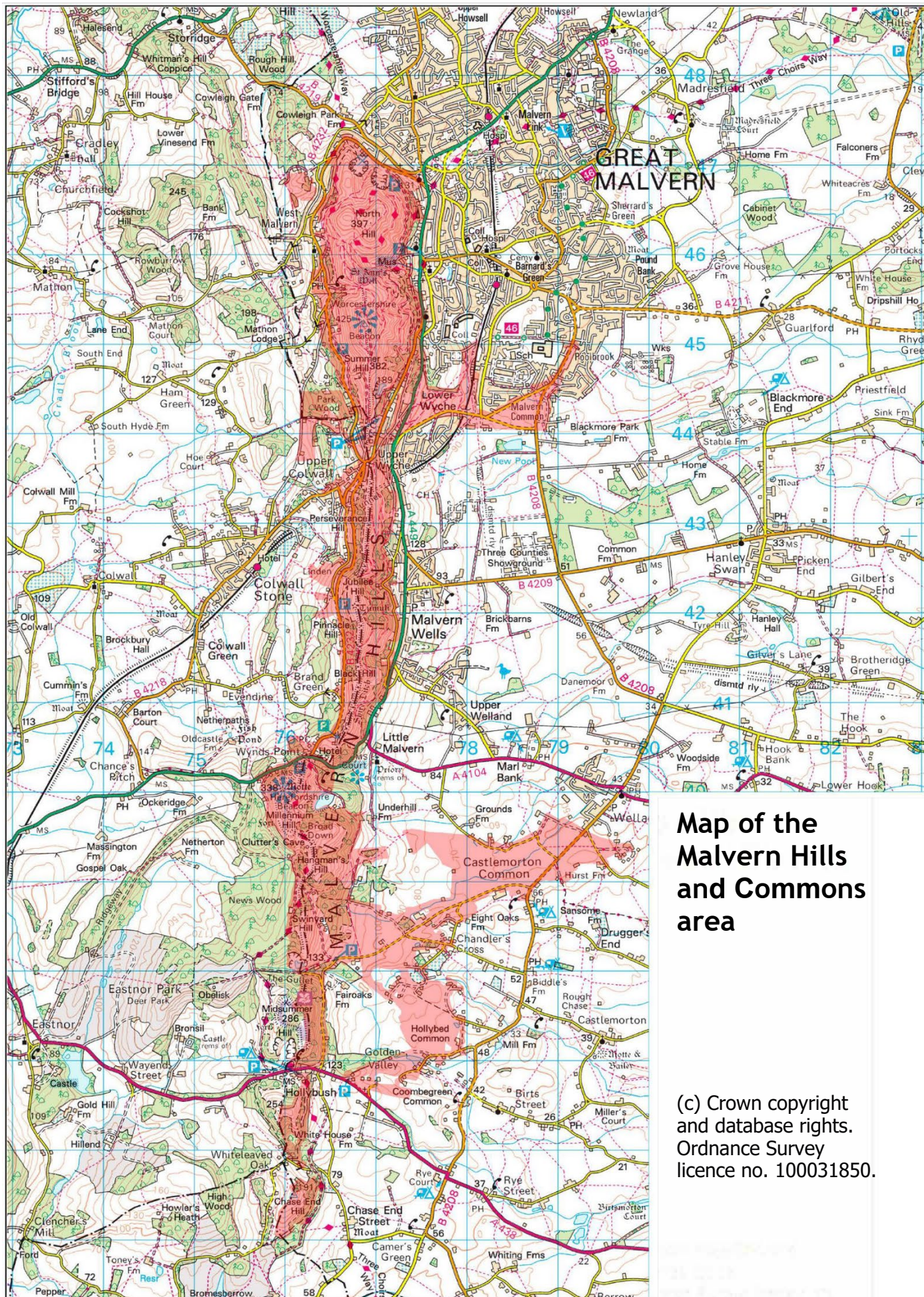
THANK YOU FOR YOUR TIME

Declaration: I declare that the respondent was unknown to me until the interview took place, and that this questionnaire has been conducted according to instructions and has been checked.

Interviewer name _____ Signed _____

Date: _____

Appendix 2: Map of Malvern Hills and Commons Area



Map of the Malvern Hills and Commons area

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Appendix 3: Origin of All Visitors

Respondents		
Base	426	
Where you normally live - County/Country	%	No
Worcestershire	49%	207
West Midlands	10%	41
Herefordshire	8%	35
Gloucestershire	7%	30
London/Middlesex	3%	11
Shropshire	2%	8
Staffordshire	2%	8
Warwickshire	2%	8
Oxfordshire	2%	8
Wiltshire	1%	6
Hertfordshire	1%	5
South Wales	1%	5
Norfolk	1%	4
Hants/Isle of Wight	1%	4
Lancashire	1%	3
Yorkshire	1%	3
Leicestershire	1%	3
Cambridgeshire	1%	3
Kent	1%	3
Bath/Bristol	1%	3
Derbyshire	0%	2
Essex	0%	2
Berkshire	0%	2
Bedfordshire	0%	2
Devon	0%	2
Dorset west and south	0%	2
Somerset	0%	2
Scotland	0%	2
France	0%	2
Durham	0%	1
Northumberland	0%	1
Cheshire	0%	1
Northamptonshire	0%	1
Nottinghamshire	0%	1
Surrey	0%	1
Buckinghamshire	0%	1
Dorset/Poole/Bournemouth	0%	1
Germany	0%	1
Sweden	0%	1

Appendix 4: Origin of Day Visitors

Break %	Total	Site				
Respondents		British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Base	344	73	79	36	92	64
Where you normally live - County/Country						
Worcestershire	60%	67%	54%	39%	55%	77%
Herefordshire	10%	12%	8%	25%	10%	3%
West Midlands	10%	7%	18%	3%	9%	8%
Gloucestershire	8%	4%	3%	11%	12%	9%
Staffordshire	2%	1%	1%	8%	2%	-
Shropshire	2%	1%	3%	-	3%	-
Warwickshire	2%	1%	4%	3%	1%	-
Oxfordshire	1%	-	4%	-	1%	-
Wiltshire	1%	-	1%	6%	1%	-
Leicestershire	1%	3%	-	-	-	-
Hants/Isle of Wight	1%	-	1%	-	-	2%
Hertfordshire	1%	1%	-	-	1%	-
Bath/Bristol	1%	-	-	3%	1%	-
Derbyshire	0%	-	1%	-	-	-
Norfolk	0%	-	1%	-	-	-
London/Middlesex	0%	-	-	-	1%	-
Buckinghamshire	0%	-	-	-	1%	-
Devon	0%	-	-	-	1%	-
Dorset west and south	0%	-	1%	-	-	-
Somerset	0%	-	-	-	-	2%
South Wales	0%	1%	-	-	-	-
Germany	0%	-	-	3%	-	-

Appendix 5: Origin of Overnight Visitor

Break %	Total	Site				
Respondents		British Camp	Worcestershire Beacon	Hollybush	Swinyards Car Park	North Quarry Car Park
Base	82	28	21	14	14	5
Where you normally live - County/Country						
London/Middlesex	12%	11%	24%	7%	-	20%
West Midlands	10%	4%	10%	7%	21%	20%
Gloucestershire	5%	-	-	7%	21%	-
Oxfordshire	5%	-	5%	7%	14%	-
South Wales	5%	4%	-	7%	14%	-
Lancashire	4%	7%	5%	-	-	-
Yorkshire	4%	4%	-	14%	-	-
Cambridgeshire	4%	11%	-	-	-	-
Norfolk	4%	-	5%	14%	-	-
Kent	4%	4%	10%	-	-	-
Hertfordshire	4%	-	-	14%	7%	-
Shropshire	2%	-	5%	-	7%	-
Warwickshire	2%	-	-	7%	-	20%
Essex	2%	-	10%	-	-	-
Berkshire	2%	7%	-	-	-	-
Hants/Isle of Wight	2%	4%	-	-	-	20%
Bedfordshire	2%	7%	-	-	-	-
Wiltshire	2%	4%	5%	-	-	-
Scotland	2%	7%	-	-	-	-
France	2%	4%	5%	-	-	-
Durham	1%	4%	-	-	-	-
Northumberland	1%	4%	-	-	-	-
Cheshire	1%	-	5%	-	-	-
Derbyshire	1%	4%	-	-	-	-
Leicestershire	1%	-	-	7%	-	-
Northamptonshire	1%	4%	-	-	-	-
Nottinghamshire	1%	-	-	-	7%	-
Worcestershire	1%	-	-	-	-	20%
Staffordshire	1%	-	5%	-	-	-
Surrey	1%	-	-	-	7%	-
Dorset/Poole/Bournemouth	1%	4%	-	-	-	-
Bath/Bristol	1%	-	5%	-	-	-
Devon	1%	-	-	7%	-	-
Dorset west and south	1%	-	5%	-	-	-
Somerset	1%	4%	-	-	-	-
Sweden	1%	4%	-	-	-	-

Appendix 6: Satisfaction Scores by Type and Location

Satisfaction Scores by Location						
	Mean Score	Very Good	Good	Neither	Poor	Very Poor
Litter clearance						
Local trip from home	4.53	56%	41%	2%	0%	-
Day out from home	4.48	54%	41%	6%	-	-
Day visit while on holiday elsewhere	4.42	50%	42%	8%	-	-
Holiday or short break (staying only in area).	4.47	53%	44%	3%	1%	-
Parking availability generally						
Local trip from home	4.57	64%	30%	5%	0%	0%
Day out from home	4.45	53%	42%	3%	3%	-
Day visit while on holiday elsewhere	4.58	58%	42%	-	-	-
Holiday or short break (staying only in area).	4.58	65%	30%	4%	1%	-
Traffic conditions						
Local trip from home	4.58	62%	34%	4%	-	-
Day out from home	4.47	53%	42%	6%	-	-
Day visit while on holiday elsewhere	4.42	67%	25%	-	8%	-
Holiday or short break (staying only in area).	4.62	65%	31%	4%	-	-
Signposting (roads)						
Local trip from home	4.21	46%	32%	19%	2%	0%
Day out from home	4.04	34%	42%	18%	4%	1%
Day visit while on holiday elsewhere	4.27	64%	18%	-	18%	-
Holiday or short break (staying only in area).	4.25	46%	36%	16%	3%	0
Footpath quality/management						
Local trip from home	4.63	68%	30%	1%	1%	-
Day out from home	4.62	63%	36%	1%	-	-
Day visit while on holiday elsewhere	4.33	58%	25%	8%	8%	-
Holiday or short break (staying only in area).	4.63	66%	33%	-	1%	-
Management of the countryside (habitats/landscapes)						
Local trip from home	4.74	77%	21%	2%	-	0%
Day out from home	4.73	73%	27%	-	-	-

Day visit while on holiday elsewhere	4.17	50%	25%	17%	8%	-
Holiday or short break (staying only in area).	4.72	75%	24%	-	1%	-
Public toilets						
Local trip from home	3.15	26%	18%	17%	24%	15%
Day out from home	3.17	26%	17%	14%	33%	10%
Day visit while on holiday elsewhere	4.50	50%	50%	-	-	-
Holiday or short break (staying only in area).	3.82	33%	39%	9%	12%	6%
Picnic sites						
Local trip from home	3.61	28%	27%	24%	18%	2%
Day out from home	3.97	34%	37%	23%	3%	3%
Day visit while on holiday elsewhere	5.00	100%	-	-	-	-
Holiday or short break (staying only in area).	4.29	42%	52%	-	6%	-
Interpretation/countryside/visitor information/boards/leaflets						
Local trip from home	3.98	35%	34%	25%	6%	-
Day out from home	4.17	40%	40%	19%	2%	-
Day visit while on holiday elsewhere	4.75	75%	25%	-	-	-
Holiday or short break (staying only in area).	4.48	58%	34%	6%	2%	-
	Mean Score	Very Quiet	Quiet	Average	Busy	Very Busy
Overall volume of people, cars and coaches today in the area						
Local trip from home	3.71	25%	33%	30%	12%	-
Day out from home	3.69	25%	32%	29%	13%	-
Day visit while on holiday elsewhere	3.92	33%	33%	25%	8%	-
Holiday or short break (staying only in area).	3.48	18%	34%	28%	21%	-
	Mean Score	Very Satisfied	Satisfied	No Real View	A little Dissatisfied	Very Dissatisfied
How has the number of people and traffic affected your satisfaction with this visit?						
Local trip from home	3.99	38%	22%	39%	-	-
Day out from home	4.36	53%	31%	15%	1%	-
Day visit while on holiday elsewhere	4.08	33%	42%	25%	-	-
Holiday or short break (staying only in area).	4.26	45%	39%	14%	3%	-

Satisfaction Scores by Location						
	Mean Score	Very Good	Good	Neither	Poor	Very Poor
Litter clearance						
British Camp	4.44	55%	42%	3%	0%	-
Worcestershire Beacon	4.59	63%	34%	2%	1%	-
Hollybush	4.32	48%	38%	12%	2%	-
Swinyards Car Park	4.54	57%	40%	3%	-	-
North Quarry Car Park	4.58	58%	42%	-	-	-
Parking availability generally						
British Camp	4.71	73%	25%	2%	-	-
Worcestershire Beacon	4.53	56%	41%	3%	-	-
Hollybush	4.70	70%	30%	-	-	-
Swinyards Car Park	4.34	52%	36%	8%	4%	1%
North Quarry Car Park	4.55	63%	29%	8%	-	-
Traffic conditions						
British Camp	4.67	69%	29%	2%	-	-
Worcestershire Beacon	4.30	42%	48%	9%	-	1%
Hollybush	4.90	90%	10%	-	-	-
Swinyards Car Park	4.57	60%	37%	3%	-	-
North Quarry Car Park	4.50	56%	37%	6%	-	-
Signposting (roads)						
British Camp	4.41	56%	30%	14%	-	-
Worcestershire Beacon	4.19	33%	53%	14%	-	-
Hollybush	4.06	43%	31%	16%	10%	-
Swinyards Car Park	4.13	47%	28%	18%	6%	1%
North Quarry Car Park	4.00	40%	26%	29%	3%	2%
Footpath quality/management						
British Camp	4.63	66%	32%	1%	1%	-
Worcestershire Beacon	4.61	61%	39%	-	-	-
Hollybush	4.86	88%	10%	2%	-	-
Swinyards Car Park	4.55	62%	33%	3%	2%	-
North Quarry Car Park	4.62	65%	34%	-	2%	-
Management of the countryside (habitats/landscapes)						
British Camp	4.77	79%	20%	-	1%	-

Worcestershire Beacon	4.77	77%	23%	-	-	-
Hollybush	4.86	88%	10%	2%	-	-
Swinyards Car Park	4.59	66%	28%	5%	1%	-
North Quarry Car Park	4.63	68%	31%	-	-	2%
Public toilets						
British Camp	2.98	8%	26%	30%	28%	8%
Worcestershire Beacon	3.76	36%	28%	15%	19%	3%
Hollybush	1.75	-	-	-	75%	25%
Swinyards Car Park	3.79	46%	25%	3%	15%	11%
North Quarry Car Park	2.69	23%	9%	20%	11%	37%
Picnic sites						
British Camp	3.31	5%	40%	36%	19%	-
Worcestershire Beacon	3.86	39%	25%	17%	18%	-
Hollybush	3.75	8%	71%	8%	13%	-
Swinyards Car Park	4.26	56%	26%	10%	5%	3%
North Quarry Car Park	3.25	21%	14%	39%	18%	7%
Interpretation/countryside/visitor information/boards/leaflets						
British Camp	4.10	38%	37%	23%	3%	-
Worcestershire Beacon	3.95	39%	25%	27%	9%	-
Hollybush	4.41	51%	41%	5%	3%	-
Swinyards Car Park	4.29	48%	36%	12%	4%	-
North Quarry Car Park	3.89	27%	38%	33%	2%	-
	Mean Score	Very Quiet	Quiet	Average	Busy	Very Busy
Overall volume of people, cars and coaches today in the area						
British Camp	3.16	8%	30%	33%	30%	-
Worcestershire Beacon	3.52	12%	36%	42%	9%	-
Hollybush	3.84	14%	58%	26%	2%	-
Swinyards Car Park	4.09	50%	23%	14%	13%	-
North Quarry Car Park	3.87	32%	30%	30%	7%	-
	Mean Score	Very Satisfied	Satisfied	No Real View	A little Dissatisfied	Very Dissatisfied
How has the number of people and traffic affected your satisfaction with this visit?						
British Camp	4.04	41%	23%	37%	-	-
Worcestershire Beacon	3.83	21%	42%	35%	2%	-

Hollybush	4.02	2%	46%	26%	-	-
Swinyards Car Park	4.34	58%	19%	22%	1%	-
North Quarry Car Park	4.32	59%	13%	28%	-	-

Appendix 7: Like About Area

Break %	Total	Which of the following best describes your visit to the Malvern Hills area today?				Resident		New/Repeat	
Respondents		Local trip from home	Day out from home	Day visit while on holiday elsewhere	Holiday or short break (staying only in area)	Resident	Non-Resident	New	Repeat
Base	424	256	74	12	82	139	285	63	361
What do you particularly like about the area?									
Beautiful views/great views/beauty/pretty	48%	43%	49%	42%	62%	42%	51%	62%	45%
Walking/exercise	24%	23%	28%	33%	21%	30%	21%	16%	25%
Quiet/peaceful/tranquil	19%	16%	20%	25%	27%	12%	22%	24%	18%
Scenery/scenic/picturesque	19%	17%	19%	25%	22%	14%	21%	22%	18%
Nature/landscape/greener y/ countryside	18%	16%	16%	-	28%	15%	20%	25%	17%
Hills	11%	12%	12%	17%	5%	9%	12%	3%	12%
Pathways/paths/trails	8%	8%	9%	8%	6%	7%	8%	6%	8%
Convenience/location/close to home/easy access	7%	9%	5%	-	2%	11%	5%	-	8%
Nice day out/lovely place to come/nice area	6%	6%	7%	8%	6%	2%	8%	13%	5%
Dog walking	5%	5%	4%	-	5%	6%	4%	5%	5%
Clean/tidy/well maintained	4%	4%	4%	8%	4%	4%	4%	3%	4%
Good parking/easy to park	4%	4%	4%	-	4%	4%	4%	3%	4%
Shops & pubs close by/towns close to hills	4%	2%	5%	-	7%	1%	5%	5%	4%
Nice cafe/eating places	4%	5%	1%	8%	1%	3%	4%	2%	4%
Everything	4%	3%	4%	8%	4%	3%	4%	3%	4%
Friendly local people	3%	4%	1%	-	5%	6%	2%	5%	3%
Unspoilt	3%	3%	1%	-	4%	1%	3%	2%	3%
Lots of space for kids/great for kids	3%	3%	1%	8%	2%	2%	3%	2%	3%
Birds/wildlife	2%	2%	5%	-	2%	1%	3%	6%	2%
Plenty of space	2%	2%	4%	-	-	1%	2%	3%	1%
Lots to see/do	1%	1%	3%	-	2%	1%	2%	5%	1%
Cycling/mountain biking	1%	1%	-	8%	2%	1%	1%	3%	1%
Come with friends/great to socialise	1%	2%	1%	-	-	1%	1%	-	2%
Different to where we live	1%	1%	1%	-	2%	1%	1%	3%	1%
Memories/nostalgia	1%	0%	1%	-	2%	1%	1%	-	1%
History	1%	-	3%	-	1%	-	1%	2%	1%
Archaeology	0%	0%	-	-	-	-	0%	-	0%
Geology of area	0%	-	-	-	1%	-	0%	2%	-
Good disabled access	0%	-	-	-	1%	-	0%	-	0%

Appendix 8: Spoilt Visit to Area

Break %									
Respondents	Total	Local trip from home	Day out from home	Day visit while on holiday elsewhere	Holiday or short break (staying only in area)	Resident	Non-Resident	New	Repeat
Base	426	257	75	12	82	139	287	63	363
What, if anything, spoilt your visit to the area today									
Nothing/None/No	87%	89%	84%	75%	84%	88%	86%	84%	87%
Dogs off lead/loose dogs/dog litter/more poo bins	5%	3%	4%	17%	9%	3%	6%	8%	4%
Weather	3%	2%	7%	-	2%	4%	2%	5%	2%
Cost of parking very high/too much if only parking for short time/only takes cash	2%	2%	3%	8%	2%	-	3%	3%	2%
Litter	2%	2%	-	-	2%	1%	2%	-	2%
Mountain bikers/cyclists that are inconsiderate	1%	2%	1%	-	-	4%	0%	-	2%
Signposting	1%	2%	-	-	-	1%	1%	-	1%
Footpaths need repair	0%	0%	1%	-	-	1%	-	-	1%
Cows damaging footpaths	0%	-	-	-	1%	-	0%	-	0%
Road surface	0%	-	1%	-	-	-	0%	-	0%
Tea shop needs celiac and nut free items	0%	-	1%	-	-	-	0%	-	0%
Busy traffic	0%	0%	-	-	-	1%	-	-	0%
Bracken rolled when birds nesting	0%	0%	-	-	-	-	0%	-	0%