



Valuing our environment

A study of the economic impact
of conserved landscapes and of the
National Trust in the South West.

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FOREWORD

Economic Impact Study

The advent of the South West Economic Development Agency together with the planned reforms of European structural funds and the Common Agricultural Policy offer tremendous opportunities to the South West Region of the United Kingdom.

They also provide challenges; the most demanding of which is to ensure that economic activity is developed in harmony with our greatest natural asset, the unique environment. It is often said that the economy of the South West is heavily reliant on its environment and yet there is little concrete evidence to quantify this association. This study breaks new ground in the search for a better understanding of this relationship and we expect that it will help inform the formulation of policies appropriate to the rural areas of the South West Region.

This study is then the first of its type and its analysis concentrates in two key areas:

Firstly, the economic impact of conserved landscapes in the South West clearly demonstrates the enormously important contribution that our coast, moorland, villages, woods and other rural attractions make to the economy through tourism and leisure spending.

Secondly, the study illustrates how the National Trust, both through its management and through the attraction of visitors is a major generator of expenditure and jobs in the region.

The impact of the National Trust is particularly significant in the more rural parts of the region, not only in the number of jobs provided, but by their continuity and stability in a time of increasingly volatile job markets.

The National Trust recognises that its work is as much about people as about places and that it is essential to find a balance between a healthy, vibrant, growing rural economy and conserving those things in our countryside that we all value so highly - the "quality of life" factors.

The National Trust is just one, albeit significant, organisation in the South West that actively cares for the region's physical environment. Other studies including that by the RSPB have sought to measure the economic impact of conservation activities and we hope this study will add significantly to and develop that area of work.

Finally, in commending the study to you, we would like to thank all the National Trust staff and volunteers who have helped in it, Tourism Associates for producing it and those who have helped fund it - PROSPER, and, with the support of MAFF, the European Agricultural Guidance and Guarantee Fund.

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SUMMARY.

‘Valuing our environment’ is a study undertaken by Tourism Associates on behalf of the National Trust in Cornwall, Devon, Wiltshire, Gloucestershire, Dorset and Somerset. The study covers:

- The staying visitor trips to the region motivated by conserved landscape and the economic benefits arising from these trips.
- The economic impact of the National Trust in the South West.

The study estimates visits, expenditure and employment, with local government district/unitary level figures building up to National Trust region and the South West planning region level. Conserved landscape relates to the managed rural environment in the South West (e.g. fields, woods, moors, villages & coastline). The study was undertaken in 1998 and the information relates to 1997.

1 The staying visitor trips to the region motivated by conserved landscape and the economic benefits arising from these trips.

- Survey work indicates that **78% of all holiday trips** to the South West are motivated by conserved landscape.
- 12.6 million holiday trips to the South West are motivated by conserved landscape per year. These trips are estimated to last **67 million nights** with a visitor spend of **£2,354 million**.
- A total of **71,400 full time equivalent jobs** are supported by landscape motivated holiday trips. Of these, 47,500 are directly supported by landscape motivated holiday trips and the linkage and multiplier effects support the balance.
- It is estimated that landscape motivated holiday trips to the South West support **97,200 actual jobs** (as opposed to full time equivalent). 70,000 of these jobs are supported directly.
- These 97,200 actual jobs represent **43% of the estimated 225,000 actual jobs** dependent on tourism in the South West.

2 The economic impact of the National Trust in the South West.

The activities of the National Trust give rise to a range of economic impacts arising from the operation of their directly managed properties, the activities of tenants of the Trust and the results of spending by visitors to Trust properties.

Total expenditure and employment.

- Total gross employment linked to the National Trust activities in the South West is estimated to be **10,913 FTE jobs or 15,457 actual jobs**.
- These jobs are supported by an estimated **£313 million** spent by the National Trust and its suppliers on wages, by visitors to Trust properties and by tenants spend on wages. Some of the spend by visitors would have taken place anyway and it is estimated that £123 million of the total is additional spend.
- For every FTE job employed directly by the Trust in the South West there are **a further 9.5 FTE jobs** arising in the SW. However, some are supported by expenditure that would have taken place anyway, and it is estimated that for every FTE Trust job there are an additional further 3.3 SW FTE jobs.

The survey work undertaken as part of this study (based on 2,000 interviews on and off National Trust sites) indicated that:

- Beautiful natural scenery and a clean and unspoilt environment play a key part in visitor enjoyment.
- Over 80% of respondents placed a high value on visiting National Trust sites, the experience being highly important to their overall trip satisfaction.
- Specific National Trust sites are important in the planning stages of a holiday.
- Overall, the National Trust is seen by visitors to play a highly significant role in the preservation of England's heritage, particularly with respect to the nation's historic buildings and coastline. Rural life, farmland and villages are seen to be less dependent on the National Trust, whereas maintenance of the countryside and nature conservation is perceived as being highly influenced by the Trust's actions.

In order to gauge the effects of the Trust's activities it was necessary to quantify the numbers of visitors at the National Trust sites. Estimates were based on National Trust figures, visitor counts and modelling.

- Visitor numbers to National Trust sites are estimated to total 12.6 million annually. 3.7 million are to properties with gated access (e.g. historic house, garden, industrial site) while 8.9 million are to ungated sites (e.g. open spaces, coastline, moor, parkland).
- Within the South West different counties have very different patterns of visits, related to the portfolio of properties in the area.
- It is estimated that the most visited National Trust property in the South West is Studland with around 1 million visits per year. The most visited gated site is Killerton, with an estimated 224,300 visits annually.

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'Valuing our environment – a study of conserved landscapes and of the National Trust in the South West' was undertaken on behalf of the Cornwall, Devon, Severn & Wessex National Trust Regions by Tourism Associates.

The overall direction of the study was jointly undertaken by the University of Exeter and the West Country Tourist Board, with the modelling and economic impact work undertaken by Geoff Broom Associates. Project management on behalf of The National Trust was undertaken by Devon Region, Killerton House, Broadclyst, Exeter EX5 3LE. Telephone 01392 881691.

1 Introduction.

1.1. How to use this report.

- 1.1.1 This report is primarily designed to provide information on the economic benefit of conserved landscape generally and of the National Trust's role in particular. The overriding objective is to provide a view of the effects at a South West regional level.
- 1.1.2 However, because of the way that the information is generated from a 'bottom up' perspective, considerable detail at a local authority district/unitary authority level has been generated, along with considerable new information about specific National Trust properties.
- 1.1.3 Refer to the section 1.6 for some of the definitions used in this report.
- 1.1.4 The figures are yearly, nominally for 1997 (although some of the supporting data is from other years).
- 1.1.5 If you require information at a local authority district or unitary authority level, refer to the appendices to this report, held in a separate document. The body of this report deals primarily with South West as a whole and, where appropriate, Trust Region and county information.
- 1.1.6 To obtain information on the surveys of visitors to the South West and National Trust properties provide information on attitudes, motivations and behaviour. The findings were compiled from 2,000 completed interviews and provide information on a South West level, as well as on a property level where interviews took place. The detailed results on the way landscape motivates visits, the significance of National Trust sites in holiday planning, along with public attitudes towards the Trust itself, are given in section 2 in the first part of this report and appendix 2 in the separate document.
- 1.1.7 To obtain information on the level of visits to individual sites see appendix 1, held in a separate document. One of the key elements required to estimate the effect of the National Trust was an indication of the use of the properties under Trust custodianship. While those properties with access by ticket or membership have records of use, the Trust owns or manages many free access (ungated) sites. A series of counts was set up across the South West and the results were used to extrapolate to the rest of the ungated sites. This exercise provides information at a site level.
- 1.1.8 To see the effects of the Trust in terms of people employed and money at a county and regional level, refer to section 3 of the first part of the report and at a district level see the separate appendix 3. Information from the National Trust records has been combined with other data on wage rates, multipliers and expenditure patterns.

- 1.1.9 The main building blocks for this study are the district/unitary level tables of spend by the Trust, its tenants and its visitors, along with the jobs supported and multiplier effects. These tables can be found in the appendices at the end of this report.

1.2 Background to the study.

1.2.1 The South West: an overview.

The South West, consisting predominantly of a peninsula, has over 60% of England's Heritage Coast and a third of the region is designated as important landscape (AONB, National Park etc.). To the east are the Cotswold Hills, the rolling chalk downs of Wiltshire and Dorset and the lowland heaths of East Dorset. The upland areas are rich in archaeological remains, of which the most famous are the awe inspiring Stonehenge and Avebury, a World Heritage Site. The remote landscapes, rich history, working ports and historical towns provide obvious attractions to holiday makers. The South West clearly has many positive features and is a place of contrasts. Geographically, the South West is the largest region in England. It has a population of nearly 5 million people, about half of whom live in rural areas. and has the lowest population density of any English region.

Across the region as a whole, Gross Domestic Product (GDP) per head as a proportion of the UK average is 96% (93% of the EU average). Within the region, however, there is a wide variation; Cornwall has a GDP per head of 74% of the UK average, the second lowest in England while Wiltshire at 115% has the fifth highest. As nationally, the economy of the South West is largely dominated by service industries with the east of the region benefiting from excellent road and rail communications. Agriculture, fishing and defence are of greater importance to the region than they are nationally. However, the contribution of these industries has declined over recent years. This decline together with that of tin mining has had a marked effect on the west of the region and in particular, the counties of Devon and Cornwall where these were traditionally dominant industries. The relative remoteness of the west of the region to a degree inhibits its growth, but it is also one of the features that proves so attractive to tourists. It is estimated that as many as 1 in 10 jobs in the region are related to the tourist industry.

1.2.2 The National Trust: an overview.

The National Trust for Places of Historic Interest or Natural Beauty was founded in 1895 as an independent charity to hold and manage, in perpetuity for the benefit of the nation, countryside and historic buildings in England, Wales and Northern Ireland.

In the South West alone, the National Trust owns some 46,330 hectares (which comprise 19% of the National Trust's landholdings in England, Wales and Northern Ireland) and protects through ownership and covenants some 265 miles of coastline, much of this designated as Heritage Coast. The protection of this coastline amounts to 46% of all coastline under protection by the National Trust in England, Wales and Northern Ireland.

There is a rich diversity of the National Trust's responsibilities in the South West. There are 71 properties open at a charge in the region including 40 historic buildings, 6 castles, 9 industrial sites, 15 ecclesiastical buildings, 4 prehistoric or roman sites, 36 gardens and 16 landscape or deer parks. One property may include an estate with a historic house, garden and parkland - other properties are simply gardens or industrial sites open to the public in its entirety. These gated properties attracted 3.24 million visitors in 1997/98.

There are also more than 240 enterprise outlets managed by the National Trust in the region, including shops, catering places and holiday cottages. One of the South West region's main resources is the high quality natural environment. This environment is believed to be responsible for a large proportion of trips undertaken by the 21 million staying visitors and 97 million day visitors, along with their estimated spend of £4.6 billion. Quantifying this relationship will inform decisions on resource allocation.

- 1.2.3 There is growing recognition of the economic benefits through successful management of a high quality environment, including the specific benefits of conservation policies for local economies.
- 1.2.4 The National Trust has a well-established reputation for conservation of properties important to the nation's heritage. It is anticipated that this study will provide another dimension; that of a generator of economic activity.
- 1.2.5 The study will provide an informed foundation for bids for funding from European and public assistance programmes, and help to inform Government and National Trust policy-making. Other target audiences include the new South West of England Development Agency regarding the role of the Trust and the general importance of conservation activity in contributing to the regeneration of an area.

1.3. Objectives of the study.

- 1.3.1 The report covers two areas of investigation:
 - The staying visitor trips to the region motivated by conserved landscape and the economic benefits arising from these trips.
 - The economic impact of the National Trust in the South West .

The landscape is a major part of what gives the South West its allure as a place to visit and live. This report investigates what that landscape means to the regional economy. However, the report does not cover the contribution the National Trust directly makes to the quality of life for the South West's residents through conservation of places of historic interest and natural beauty.

- 1.3.2 This study covers the South West planning region, which includes the seven counties of:
 - Cornwall.
 - Devon.

- Dorset.
- Somerset.
- Wiltshire.
- Former Avon unitary authorities of Bristol, Bath & North East Somerset, North Somerset and South Gloucestershire.
- Gloucestershire.

1.3.3 The staying visitor trips to the region motivated by conserved landscape and the economic benefits arising from these trips.

1.3.3.1 The study produces an overall relationship between the region's landscape (in terms of 'quality of environment') and number of staying visits to the region. In essence this isolates the number of trips primarily motivated by the landscape as opposed to other reasons for visiting. Expenditure is included within this relationship, enabling the landscape to be valued in terms of tourism expenditure.

1.3.3.2 This section on the regional importance of landscape does not just refer to the impact of National Trust landscape, but to the wider South West landscape irrespective of its custodians.

1.3.3.3 Note that urban landscapes are excluded from this part of the study's terms of reference.

1.3.4 The economic impact of the National Trust in the South West.

1.3.4.1 The study presents information on the staff employed by the Trust and the estimated jobs supported by the Trust's purchases of goods and services. It also estimates the employment supported on the Trust's agricultural and commercial tenancies.

1.3.4.2 The study goes on to estimate the visitor and working holiday volunteer spend, and the jobs supported.

1.3.4.3 The study also estimates the induced effects of the expenditure and jobs supported (i.e. the multiplier effect).

1.3.4.4 The study includes estimates of the visitors to National Trust properties, including those without formal admission arrangements (i.e. ungated sites).

1.3.4.5 Cornwall and Devon constitute their own separate National Trust regions while Dorset, Somerset, Wiltshire and the former Avon form the Wessex National Trust region. The remaining South West county, Gloucestershire, forms only one of the National Trust Severn region counties.

1.4. Methodology.

- 1.4.1 The part of the study relating to '*The staying visitor trips to the region motivated by conserved landscape and the economic benefits arising from these trips*' uses information from a survey of visitors leaving the South West to apportion known totals of staying holiday visits to the region. Using existing information this is translated into expenditure and then, using the Cambridge Economic Impact of Tourism Model, estimates of jobs are produced.
- 1.4.2 The study recognises that landscape will commonly be only one of a plethora of motivations and sets out to apply proportions of visits rather than assuming a dichotomy.
- 1.4.3 The process of attributing motivations is based upon direct questions to holiday visitors. Following a review of indirect techniques it was decided to use direct questions about motivations and actions.
- 1.4.4 The second part of the study, '*The economic impact of the National Trust in the South West*', used an extensive review of National Trust management information to collect information on:
- Wages.
 - Direct employment.
 - Purchases of goods and supplies.
 - Farm and business tenancies.
 - Volunteer holidays.
 - Holiday cottage lettings.
- 1.4.5 A sample of transactions were analysed to determine the extent of local against non-local purchases.
- 1.4.6 Visitor counts were undertaken at a selected range of ungated National Trust properties. The sample was chosen to reflect a variety of landscape types and different levels of notoriety.
- 1.4.7 The portfolio of National Trust properties were categorised by size, type and notoriety. This information was used to produce estimates of use and additionality.
- 1.4.8 Further detail on the methodologies used on the specific elements of the study can be found in the relevant chapters or in the relevant appendices.

1.5 Definitions.

1.5.1 The list below defines some of the terms commonly used in this study.

The **South West** planning region includes the seven counties of Cornwall, Devon, Dorset, Somerset, Wiltshire, the former Avon (unitary authorities of Bristol, Bath & North East Somerset, North Somerset and South Gloucestershire) and Gloucestershire.

National Trust ('NT' or 'Trust') is given to mean the four different National Trust regions jointly or singly as appropriate – Cornwall region, Devon region, Severn region and Wessex region.

Direct NT spend on jobs indicates the National Trust spend on direct staff costs i.e. employees such as gardeners, wardens, builders, curators etc.

NT supply chain spend/jobs indicates National Trust spend on suppliers of goods and services and the jobs supported by this round of spending.

NT tenant direct spend & jobs indicates Farm and Business tenancy spend on employment i.e. the employees and proprietors supported.

NT tenant supply chain spend & jobs indicates National Trust tenants spend on suppliers of goods and services and the jobs supported by their spending.

External spend/jobs indicates visitor and volunteer spend on non-National Trust suppliers of goods and services and the jobs supported by this round of spending.

Induced spend/jobs indicates the spend and jobs supported through second and subsequent transactions in the defined area (i.e. multiplier).

Conserved landscape relates to the managed rural environment in the South West and covers fields, woods, moors, villages & coastline. Large towns and cities are not intended to be part of the landscape element of this study, although it should be noted that in the visitor survey, the definition relies on visitor perceptions.

Full Time Equivalent Jobs is a measure of employment that combines seasonal, casual and part-time employment into an approximation of full-time employment.

1.6 Acknowledgements.

- 1.6.1 Tourism Associates gratefully acknowledges the help and support it has received when undertaking this study.
- 1.6.2 In particular, thanks are offered to Stuart Cooper for his assistance with the process of collecting the National Trust expenditure information and to John Longworth-Krafft as National Trust Project Manager. Thanks are also offered to the Public Affairs Managers, and to volunteers and volunteer co-ordinators across all four National Trust regions for their efforts in completing the programme of visitor counts at the ungated National Trust sites.
- 1.6.3 The National Trust would wish to thank PROSPER for their financial support for this study, and to thank the Ministry of Agriculture, Fisheries & Food and the European Commission for the financial support provided through the European Agricultural Guidance and Guarantee Fund.

2. Staying visitor trips to the region motivated by conserved landscape, and the economic benefits arising from these trips.

2.1. Summary.

Conserved landscape relates to the managed rural environment in the South West.

- **12.6 million holiday trips to the South West are motivated by conserved landscape. These trips are estimated to last 67 million nights with a visitor spend of £2,354 million.**
- **A total of 71,400 full time equivalent jobs are supported by landscape motivated holiday trips.** Of the total, 47,500 full time equivalent jobs are directly supported by landscape motivated holiday trips and the linkage and multiplier effects support 17,900 full time equivalent jobs.
- It is estimated that landscape motivated holiday trips to the South West support 97,200 actual jobs (as opposed to full time equivalent). 70,000 of these jobs are supported directly.
- **These 97,200 actual jobs represent 43% of the estimated 225,000 actual jobs dependent on tourism in the South West.**
- Historical evidence indicates the powerful influence of landscape on holiday taking decisions.
- 428 interviews were undertaken in a survey of visitors leaving the South West undertaken during April to September 1998. The visitors were asked about the extent to which rural landscape had motivated their trip away from home. **The survey indicated that states that 78% of all holiday trips are motivated by rural landscape.**

2.2. Background.

2.2.1 There is considerable historical information indicating the powerful effect that rural landscape has in motivating staying trips to the region.

- The 1989 'Visitor attitude to the West Country' research undertaken by MEW indicated that 61% of people who had recently taken a long holiday in Britain preferred a rural site, either inland or by the sea for a main holiday location in Britain (of those able to state a preference). The proportion for additional holidays was slightly higher at 63%.
- The 1989 MEW study also indicated that 46% of those surveyed thought that the West Country (slightly smaller area than the South West) had 'beautiful natural scenery'. This proportion rose for counties in the west and fell for counties in the east.
- The 1991 'Long Holiday Destination Choice' research also undertaken by MEW asked a sample of people who had recently taken a long holiday in Britain to rank a selection of destination attributes. 'Beautiful scenery' was the most important attribute in terms of deciding on where to take a holiday, scoring an average of 3.45 out of 4. The study did note that importance of attributes did vary with different types of holidaymaker.
- The 1992 'Short Holiday Destination Choice' research also undertaken by MEW asked a sample of people who had recently taken or considered a short holiday in Britain to rank a selection of destination attributes. 'Beautiful scenery' was the second most important attribute in terms of deciding on where to take a holiday, scoring an average of 3.03 out of 4.
- The 1994 'Non-visitor Attitude to the West Country' research indicated that promotion of the West Country's beautiful rural scenery was one method of attracting sections of the holiday market currently visiting other destinations.
- Various local surveys (Cornwall Holiday Survey 1998, Somerset Visitor Survey 1997, Wiltshire Visitor Survey 1997) also indicate the importance of landscape in visitors' attitudes.

2.3. Methodology.

2.3.1 A survey of visitors leaving the South West was undertaken during April to September 1998. 428 interviews were undertaken at Michaelwood, Andover and Sedgemoor services amongst leisure visitors leaving the region. A variety of weekday/weekend and school holiday/non-holiday dates were used to provide a cross section of visitors.

2.3.2 Selection was on a random basis, resulting in very few day visits from home (some 4.2% of the total). The results cannot therefore be confidently applied to day visitors.

2.3.3 The visitors were asked about the extent to which rural landscape had motivated their trip away from home, using essentially the same

questionnaire as that used on the National Trust interview sites. See the separate appendix (A2) for the full visitor survey report.

2.4 Total visitors to the South West.

- 2.4.1 Estimates of staying visitors to the South West are based on the United Kingdom Tourism Survey (UK residents staying away from home in Britain) and the International Passenger Survey (overseas residents staying in Britain). The latest published editions of these surveys relate to 1997.
- 2.4.2 23.2 million staying trips were made to the South West in 1997, staying 117 million nights away from home with associated spend of £3,928 million. Overseas visitors make up 2.2 million of the trips. See table 2.1.
- 2.4.3 Of the total, holiday trips make up an estimated 72% of trips by UK residents and 53% of overseas residents.

	Trips (million)	Nights (million)	Spend (£ million)
UK holiday trips	14.9	77.8	2,689
UK business trips	1.7	4.5	550
UK visits to friends/relatives	3.8	10.9	246
Other UK trips	0.8	3.9	182
Overseas holiday trips	1.3	8.0	298
Other overseas residents trips	1.0	12.0	430
Total	23.2	117.0	3,928

- 2.4.4 Additionally, an estimated 27% of the UK resident staying trips to the South West start their trips from within the South West. It can be argued that such trips represent import substitution because they could have gone to some other destination had they not come to the South West. However, there is other competition for spending apart from holiday trips, which cloud this relationship. This study therefore presents an analysis both including and excluding these trips.
- 2.4.5 Arguably visits to friends and relatives are partially motivated by landscape considerations but this is an indirect relationship, subservient to the location of friends and relatives in the first place. While place of residence (and location of businesses) may be related to landscape quality, there are too many other factors to attempt to quantify this relationship within this study.
- 2.4.6 Therefore the total universe of staying trips available to be potentially influenced by rural landscape is 16.2 million, around 1 million of which originate from overseas. Excluding trips from within the South West gives a total universe of 12 million. See table 2.2.

Table 2.2 Total holiday trips to the South West 1997.			
	Trips (million)	Nights (million)	Spend (£ million)
UK holiday trips from outside the South West	10.9	56.8	1,986
UK holiday trips from within the South West	4.0	21	3,316
Overseas holiday trips	1.3	8.2	298
Total	16.2	86.0	3,018

2.5 The influence of conserved landscape.

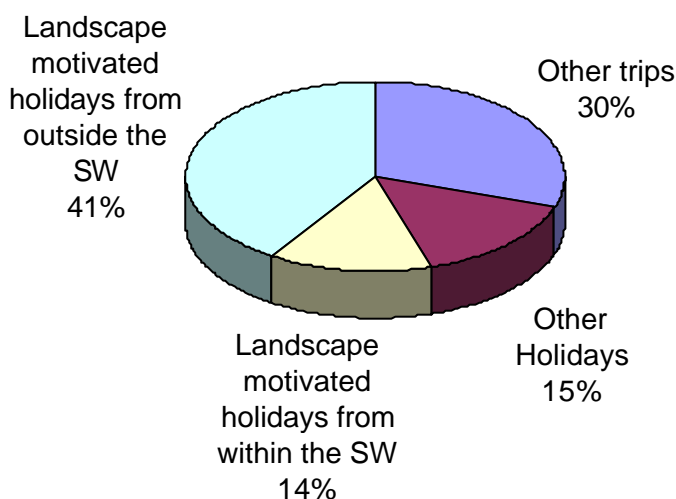
- 2.5.1 The survey of visitors leaving the South West attributed scores to indicate the extent to which conserved landscape motivated their trip away from home.
- 2.5.2 The average score given was 7.8 out of 10, which was directly translated into a motivation proportion of 78% to be applied to the number of visits. In effect this states that 78% of all holiday trips (or on average 78% of each holiday trip) are motivated by conserved landscape. While the research did not set out to produce motivation scores by individual counties, the sample does indicate that people staying in Cornwall scored landscape at 81%. The other counties were very close to the average for those with a large enough sample size to determine scores.
- 2.5.3 This proportion seems broadly in line with some of the earlier survey evidence on the importance of landscape in decisions about where to take holiday trips.
- 2.5.4 The effect of applying this proportion to the total number of holiday trips gives a total of 12.6 million trips to the South West motivated by conserved landscape. These trips are estimated to last 67.1 million nights with a visitor spend of £2,354 million. See table 2.3.
- 2.5.5 Taking just the trips originating outside the South West gives a reduced total of 10 million holiday trips. These trips are estimated to last 51 million nights with a visitor spend of £1,782 million. See table 2.3.

Table 2.3 Conserved landscape motivated holiday trips to the South West 1997.

	Trips (million)	Nights (million)	Spend (£ million)
UK holiday trips from outside the South West	8.5	44.3	1,549
UK holiday trips from within the South West	3.2	16.4	572
Overseas holiday trips	1.0	6.4	233
Total landscape motivated	12.7	67.1	2,354

2.5.6 The staying holiday trips motivated by conserved landscape represent 55% of all staying trips for all purposes to the South West.

Total 23.2 million staying trips to the SW 1997



2.6 Jobs supported by conserved landscape motivated trips.

2.6.1 The estimates of visitor spend by conserved landscape motivated trips were used in the second stage of the Cambridge Economic Impact of Tourism model, developed by Geoff Broom Associates. This model draws upon a variety of published and unpublished data to estimate the business types receiving visitor spend and the direct, linkage and multiplier jobs resulting from this spend.

Tourism spend by economic sector £ million	Total	Accommodation	Retail	Eating and drinking out	Entertainment & attractions	Transport, garages & parking
UK Holidays	£2,121.6	£742.6	£275.8	£445.5	£148.5	£509.2
Overseas Holidays	£232.8	£97.3	£50.1	£55.9	£12.3	£17.2
All Holidays	£2,354.4	£839.9	£325.9	£501.4	£160.9	£526.4

2.6.2 Of the £2,35.4 million spend by conserved landscape motivated visits (from both outside and within the South West), £840 million is spent with the accommodation industry, £526 million with transport and £501 million with the catering industry. See table 2.4.

2.6.3 The spend figures are adjusted to turnover, and then using regional wage rates into full time equivalent jobs. See table 2.5.

	Turnover £ m	Wages £ m	Direct FTE jobs
Shops	£322.6	£67.7	4,500
Restaurants, pubs	£491.4	£147.4	11,700
Attractions/entertainment	£169.1	£54.1	4,000
Garages/transport	£315.8	£79.0	4,600
Accommodation	£844.9	£278.8	22,700
Total	£2,144	£627	47,500

2.6.4 It is estimated that 47,500 full time equivalent jobs are directly supported by conserved landscape motivated holiday trips to the South West. Accommodation and catering are the sectors benefiting most in direct employment terms.

2.6.5 Linkage and multiplier effects are applied to the direct expenditure and employment. Linkage jobs are directly related to the spend on local suppliers and services (e.g. goods wholesalers, cleaners, accountants etc.). These jobs are additional to the direct jobs in the businesses in receipt of visitor spending. Multiplier spend and jobs arise from the spending of wages by those employed directly and in linkage jobs, plus the jobs arising as a result of the additional residents living in the area where the household income is from tourist supported spending. This includes multiple rounds of

spending although the multiplier factor drops considerably in each successive round of expenditure.

Table 2.6 Linkage and multiplier effects of expenditure by conserved landscape motivated holiday trips.

Local linkages spend £ m	Local linkages FTE* jobs	Local multiplier spend £ m	Local multiplier FTE* jobs	Total direct & indirect FTE* jobs
£712	14,600	£465	9,300	71,400

* FTE = full time equivalent.

- 2.6.6 The linkage and multiplier effects add another £1,177 million spend, resulting in an additional 23,900 full time equivalent jobs. This gives a total of 71,400 full time equivalent jobs supported by landscape motivated holiday trips.
- 2.6.7 It is estimated that in actual jobs (as opposed to full time equivalent), conserved landscape motivated holiday trips to the South West support 70,000 actual jobs directly and 27,200 jobs indirectly. The total 97,200 represents 43% of the estimated 225,000 actual jobs dependent on tourism in the South West.
- 2.6.8 If the analysis is restricted only to those trips from outside the South West, the visitor spend estimates stand at £1,782 million (see table 2.3 or paragraph 2.5.5).
- 2.6.9 The visitor spend for trips from outside the South West is estimated to support 54,200 FTE jobs, 18,200 indirectly. These are estimated to equate to 73,800 actual jobs of which 53,100 are supported directly.

2.7 County estimates.

- 2.7.1 A range of impacts have been analysed at county level. These estimates are based upon all holiday trips to the South West (i.e. including those who have started from within the region). These estimates use the higher landscape motivation rating given by those visitors staying in Cornwall (see paragraph 2.5.2).
- 2.7.2 Note that the sources for these statistics no longer allow the separation of the county formerly known as Avon. The unitary authorities which now exist in its place are included within the overall Somerset figures. This also includes the unitary authority of South Gloucestershire.

Table 2.7 All holiday trips to the South West by county.			
	Holiday Trips m	Holiday Nights m	Holiday £'s m
Cornwall	3.8	24.9	£856
Devon	4.7	26.5	£1,017
Dorset	2.7	13.7	£421
Gloucestershire	1.2	4.1	£110
Somerset & Bristol	3.1	13.3	£451
Wiltshire	0.8	2.9	£91
Note that totals may not match earlier SW figures because of rounding.			

2.7.3 Table 2.7 provides details on all holiday trips, nights and spend by county, and table 2.8 details the landscape motivated trips.

Table 2.8 Conserved landscape motivated holiday trips to the South West by county.			
	Holiday Trips m	Holiday Nights m	Holiday £'s m
Cornwall	3.0	20.1	£694
Devon	3.7	20.7	£794
Dorset	2.1	10.7	£328
Gloucestershire	0.9	3.2	£86
Somerset & Bristol	2.4	10.4	£352
Wiltshire	0.6	2.3	£71
Note that totals may not match earlier SW figures because of rounding.			

2.7.4 Table 2.9 provides estimates of the Full Time Equivalent jobs supported by county and table 2.10 gives the actual job estimates. Note that there are approximately 300 jobs which are supported by spend leaking out of the individual county economies but remaining within the South West – i.e. a ‘region effect’. These jobs represent the difference between the sum of the jobs below and the estimates in the regional tables earlier.

Table 2.9 FTE jobs supported by conserved landscape motivated holiday trips to the South West, by county.

	Directly supported	Indirectly supported	Total
Cornwall	14,000	6,900	20,900
Devon	16,000	7,900	23,900
Dorset	6,600	3,300	9,900
Gloucestershire	1,700	800	2,600
Somerset & Bristol	7,100	3,600	10,700
Wiltshire	1,400	700	2,200
Note that totals will not match earlier SW figures because of region effect.			

Table 2.10 Actual jobs supported by conserved landscape motivated holiday trips to the South West, by county.

	Directly supported	Indirectly supported	Total
Cornwall	20,600	7,900	28,500
Devon	23,500	9,000	32,500
Dorset	9,700	3,700	13,400
Gloucestershire	2,500	1,000	3,500
Somerset & Bristol	10,500	4,000	14,600
Wiltshire	2,100	800	2,900
Note that totals will not match earlier SW figures because of region effect.			

3. The economic impact of the National Trust in the South West.

3.1 Summary.

The activities of the National Trust give rise to a range of economic impacts arising from the operation of their directly managed properties, the activities of tenants of the Trust and the results of spending by visitors to Trust properties. The study quantifies the overall effect and isolates an additionality effect resulting from visitors motivated to make a trip because of a National Trust property.

Trust expenditure.

- The Trust spends some £16 million in meeting wage costs of its own employees in the South West as a whole, supporting some 1,885 jobs, equivalent to 1,156 Full Time Equivalent (FTE) jobs.
- The Trust in the South West spends some £32 million on supplies and services including the costs of maintaining its properties. Of this amount, £19 million is spent within the South West, supporting 325 FTE jobs or 370 actual jobs.

Trust tenants.

- The Trust leases to its tenants some 73,360 acres of agricultural land within the South West. Wage costs associated with farming this land are estimated to amount to £8,960,490, supporting some 746 FTE jobs or 1,015 actual jobs.
- There are 85 commercial properties leased from the Trust by operators of businesses in the South West. The total rateable value of these properties amounts to £336,362. It is estimated that some 216 FTE jobs are supported within these premises, or some 246 actual jobs.
- Spending by agricultural tenants on the purchase of supplies and services is estimated to support a further 149 FTE jobs or 170 actual, while similar spending by commercial tenants is estimated to support an additional 23 FTE jobs or 28 actual jobs.

Visitors and volunteers.

- Additional jobs are supported by volunteers on National Trust sites. Volunteers staying and working on the Trust's properties spent 6,808 nights in the South West, generating £115,736 expenditure off site in the locality. This is estimated to support the equivalent of 3 actual jobs.
- The Trust owns 132 holiday cottages in the South West, which hosted 127,623 holiday nights. Excluding payments to the Trust for the accommodation element, holidaymakers staying in the cottages are estimated to have spent some £2,933,633 in the Region, supporting some 56 FTE jobs locally or 79 actual jobs.

- It is estimated that some 12,783,100 visits were made to the 281 National Trust sites within the South West. Taking account of multiple visits on the same day by some individuals, this represents a total of 10,701,986 visitor days.
- These visitors spent a total of £257 million on those days, including accommodation costs for the night by holiday tourists. Of this total, it is estimated that £12.6 million was spent on entrance charges, goods and refreshments at National Trust sites.
- Off site spending by those visitors is estimated to support some 6,508 FTE jobs or 9,136 actual jobs directly in tourism related businesses or indirectly in suppliers to those businesses.

Induced effects.

- Spending of wages by employees whose jobs are supported by NT activity or visitor spending will in turn result in an additional round of spending by those employees in the local area. These induced effects are estimated to support an additional 852 FTE jobs or 971 additional jobs in the Region.

Total employment.

- Total gross employment linked to the National Trust activities in the South West is therefore estimated to be 10,913 FTE jobs or 15,457 actual jobs. These jobs are supported by an estimated £313 million spent by the National Trust on wages and supplies, by visitors to Trust properties and by tenants spend on wages.
- For every FTE job employed directly by the Trust in the South West there are a further 9.5 FTE jobs arising in the SW. However, some are supported by expenditure that would have taken place anyway (see additionality below).

Additionality.

- Not all the visitor spending of £257 million can be attributed to the existence of the National Trust sites in the Region. Some trips and spending would have occurred in any event. Taking account of the proportion of trips that were pre-planned, the number of trips involving travel into other Districts and the relative importance of the sites visited, it is estimated that the additional net expenditure arising is some 25% of the total. Net expenditure therefore amounted to £64 million, supporting 1,614 FTE jobs or 2,306 actual jobs.
- Taking account of the net additionality of visitor spending associated with visits to National Trust properties, the net employment is estimated at 5,064 FTE jobs or 7,029 actual jobs.
- On this basis, for every FTE job employed directly by the Trust in the South West there are a further 3.3 FTE jobs arising in the Region.

3.2 Range of impacts.

3.2.1 National Trust activities in the South West give rise to a range of direct and indirect economic impacts within the Region. Some of these impacts arise directly from the Trust's own operations, but others will occur because of the role of the Trust as landlord or as a provider of tourism attractions and accommodation.

3.2.2 For the purposes of this study we have distinguished six main forms of impact, namely:

- National Trust expenditure on employment.
- National Trust supply chain expenditure on services and goods purchased as a result of its activities in maintaining and managing its estate.
- National Trust Tenants expenditure on employment, that is to say the employment on land and sites leased by the Trust to tenants.
- National Trust Tenant supply chain expenditure on services and goods purchased as a result of the activities of tenants in relation to the land and sites leased from the Trust.
- External expenditure taking place in the local economy arising from off site spending by visitors and volunteers attracted to National Trust sites.
- Induced expenditure arising as a result of expenditure of wages locally by people whose employment is supported directly or indirectly by reason of the National Trust's activities.

The various impacts are discussed in the following sections.

3.3 Direct impacts arising from National Trust expenditure on employment.

3.3.1 The Trust spends a substantial amount in wages and salaries to its employees who manage the wide range of activities the Trust undertakes throughout the South West Region. These include employment arising in:

- The Regional offices located within the South West at Killerton, Lanhydrock, Tewkesbury and Warminster.
- The staff employed to manage and maintain the many gated and ungated sites and properties managed directly by the National Trust.
- Staff employed in free standing shops away from NT sites.
- Staff employed in national offices located in the Region at Melksham and Cirencester who provide services for the Trust's operation nationally.

3.3.2 Information has been provided by the Trust in respect of expenditure on wages in the various offices and properties throughout the South West and the employment secured by that expenditure. The data has been

disaggregated down to District Council level, although there are occasional discrepancies in that some employment is based at properties or sites in adjoining Districts.

- 3.3.3 Overall, spending by the Trust on wage costs within the South West is estimated to amount to over £16 million, (inclusive of National Insurance and any pension contributions borne by the Trust). This expenditure supports a total of 1,885 jobs including part time staff, equivalent to 1,156 full time equivalent jobs. As might be expected, Devon and Cornwall with a large number of properties, account for a relatively high proportion of the total. The total for Wiltshire is also high reflecting the significant number of jobs in the national offices at Melksham. A summary by County is set out in table 3.1.

	Expenditure	FTE jobs	Actual jobs
Avon	£311,840	23.55	32
Cornwall	£3,246,193	277.05	505
Devon	£2,973,740	263.50	522
Dorset	£1,338,537	97.60	162
Gloucestershire	£2,654,570	157.75	245
Somerset	£871,099	63.25	128
Wiltshire	£5,028,257	273.70	291
South West	£16,424,236	1,156.40	1,885
<i>Of which Wessex NT</i>	<i>£7,549,733</i>	<i>458.10</i>	<i>613</i>

3.4 National Trust supply chain expenditure.

- 3.4.1 In addition to wage costs, the National Trust also spends substantial amounts on the purchase of goods and services to support its operations in the South West. This expenditure varies from the purchase of retail and catering supplies to legal and design services. Information on such expenditure has been extracted from the accounts held at regional and national offices within the Region and collated by the main origin of the spending, goods and services bought and the place where the money is actually spent.
- 3.4.2 The pattern of expenditure will vary by the origin of the expenditure. Thus the breakdown of spending by individual properties and the suppliers benefiting from that expenditure will differ substantially to regional or national office spending. Therefore, the accounts have been analysed to distinguish between spending originating in:
- Individual properties managed by the Trust.
 - Retail enterprises managed by Regional offices of the Trust.

- National Trust Enterprise spending in respect of its national centre at Melksham and the six town shops operated directly by NTE at Bath, Salisbury, Dorchester, Melksham, Truro and Wells.
- Regional and national offices within the South West.

3.4.3 For the purpose of this study, the expenditure by the Trust from its properties and offices in the Region has been collated into four main categories, namely:

- Expenditure on the purchase of building supplies and services related to the ongoing maintenance and restoration of sites and properties. This category includes some expenditure on outside contractors as well as the purchase of building supplies.
- Spending on services related to the Trusts operations including specialist design and conservation services and legal and financial services.
- The purchase of supplies for resale in the retail and catering operations managed by the Trust at its properties including the free standing National Trust shops in the Region.
- Other costs including office costs, utility services and other expenditure not accounted for elsewhere.

3.4.4 Overall expenditure arising from Trust activity in the South West amounted to over £32 million of which just over a third was spent on construction activity. A summary of spending by county area is set out in table 3.2 below.

	Construction	Services	Supplies	Other	Total
Avon	501,040	41,204	171,956	159,223	873,422
Cornwall	2,651,527	422,271	2,132,085	600,999	5,806,881
Devon	2,376,322	347,330	2,375,954	558,480	5,658,086
Dorset	1,716,970	65,380	1,418,020	1,036,664	4,237,034
Gloucestershire	589,340	459,880	646,150	406,489	2,101,859
Somerset	855,073	91,031	529,050	353,357	1,828,510
Wiltshire	1,745,378	1,505,174	2,976,426	5,394,075	11,621,053
South West	10,435,650	2,932,270	10,249,641	8,509,287	32,126,845
<i>Of which Wessex NT</i>	<i>4,818,461</i>	<i>1,702,789</i>	<i>5,095,452</i>	<i>6,943,319</i>	<i>18,560,021</i>

3.4.5 The locations benefiting from the expenditure on supplies and services have also been traced as far as possible by analysing a substantial sample of individual invoice records. In particular, the analysis has sought to differentiate between spending on supplies and services which benefits businesses in:

- The local District Council area.

- The County area.
- The South West as a whole.
- Elsewhere in the United Kingdom.

3.4.6 There are some problems in the analysis of individual transactions in that some suppliers require invoices to be passed to a central point rather than the local outlet. Where a substantial number of such invoices was identified, further analysis of the likely distribution of local outlets used was undertaken with assistance from the Trust. It should also be noted that the analysis allows local expenditure by properties or offices within any particular District to be estimated, but not the impact at individual District level of expenditure by properties elsewhere purchasing from suppliers in other Districts in the Region, although such expenditure can be captured at County and Regional level.

3.4.7 Of the £32 million of spending originating within the South West Region, some £19 million is retained within the Region as a whole. Within the Region, the sum total retained within the Counties in which the spending originated amounted to just over 53% of total spending, with Gloucestershire retaining nearly two-thirds of county expenditure while Wiltshire only managed 39%. See table 3.3.

	Within county	Elsewhere in South West	Elsewhere outside the South West
Avon	469,615	49,742	354,066
Cornwall	3,411,778	1,154,644	1,240,459
Devon	3,354,117	584,513	1,719,457
Dorset	2,326,466	232,037	1,678,531
Gloucestershire	1,353,233	154,813	593,813
Somerset	984,297	101,737	742,476
Wiltshire	4,570,555	263,198	4,775,955
South West	16,470,321	2,540,684	11,104,756
<i>Of which Wessex NT</i>	<i>8,350,932</i>	<i>646,714</i>	<i>9,588,391</i>

3.4.8 Having estimated the total supply chain spending arising by type and spend location, it is possible to estimate the volume of employment generated in businesses benefiting from such spending. The jobs generated per £1,000 of turnover in such businesses will vary depending on the nature of the business and its management, and accurate measures are not available through this study. However, drawing on other studies and national

indicators, average figures can be assumed for the different sectors. For the purposes of estimating employment arising, it has been assumed that 1 job will be generated per:

- £50,000 turnover in the construction sector, reflecting the mix between suppliers of materials where turnover-job ratio is likely to be lower and specialist craftsmen employed on a contract basis where the ratio will be higher.
- £25,000 turnover in the services sector reflecting the relatively high proportion of turnover represented by wages in that sector.
- £100,000 turnover in the supply sector reflecting the warehouse distribution function of many suppliers.
- £100,000 turnover in the other spend sector.

3.4.9 On the basis of these assumptions, it is estimated that 515 full time equivalent jobs arise indirectly as a result of National Trust purchases from the Region. Of the total, 325 are generated within the South West. A summary of the indirect impact arising from supply chain expenditure is given in table 3.4 below.

Table 3.4 Indirect employment arising from NT purchases of supplies and services.				
	Within county	Elsewhere in South West	Elsewhere outside the South West	Total FTE employment
Avon	8	1	6	15
Cornwall	62	17	19	98
Devon	54	11	26	91
Dorset	34	4	24	62
Gloucestershire	28	2	10	41
Somerset	16	2	12	30
Wiltshire	83	4	92	179
South West	285	40	190	515
<i>Of which Wessex NT</i>	<i>140</i>	<i>10</i>	<i>135</i>	<i>286</i>

3.4.10 The actual jobs supported will be higher taking account of part time working. However the proportion of full time jobs will vary from business to business. In order to provide an estimate, a ratio of 1 FTE job per 1.14 actual jobs is assumed reflecting the numbers for the service sector as recorded in the national Census of Employment data. On this basis, around 587 actual jobs are supported indirectly in the supply chain by NT spending, of which 370 actual jobs are likely to be within the South West.

3.5 National Trust tenancies.

3.5.1 Apart from the sites managed directly by the National Trust, there are a significant number of sites which are leased by the Trust to tenants in the South West. These sites include some 73,360 acres of farmland leased to tenants, and 85 commercial properties or sites with a rental value in excess of £500. There are in addition a large number of properties with lower rateable values, but it is assumed that these will be largely rented for non commercial purposes, e.g. domestic garages.

Agricultural tenancies.

3.5.2 The farmland varies in type and value from marginal hill grazing to good quality mixed farming land. The annual survey of farm holdings and expenditure carried out by the University of Exeter for the Ministry of Agriculture in the South West provides information on the relative employment costs per hectare of land in seven different categories of farmland. By applying the average costs to the total land area in each category, it is possible to estimate the value of wage expenditure in respect of tenanted farmland owned by the Trust, and from that to estimate the number of jobs supported.

	Area of tenanted land	Estimated wage generated	Estimated full time equivalent jobs	Estimated actual jobs
Avon	1,157	£148,635	12	16
Cornwall	9,833	£1,238,400	103	134
Devon	21,680	£2,621,862	218	284
Dorset	15,328	£2,077,614	173	225
Gloucestershire	5,109	£580,187	48	63
Somerset	11,378	£1,164,186	97	126
Wiltshire	8,875	£1,129,606	94	122
South West	73,360	£8,960,490	746	970
<i>Of which Wessex NT</i>	36,738	£4,520,041	376	489

3.5.3 Overall, it is estimated that the tenanted farmland supports nearly £9 million of farm wages. The average wage for employed agricultural workers is some £10,000. Taking account of some on costs, and some of the earnings actually being made by the tenant farmer themselves, an average figure of £12,000 is assumed to support one full time agricultural job on Trust tenanted

farmland. Thus the full time agricultural jobs directly supported on such land is estimated at 746 jobs. The University of Exeter survey also provides information on the structure of farm employment in the South West which suggests that the ratio between FTE jobs and actual jobs is 1:1.3. It is therefore calculated that the total number of actual jobs supported by tenanted farmland is some 970 jobs. A breakdown by county is set out in table 3.5 on the previous page.

Commercial tenancies

- 3.5.4 The 85 commercial properties leased to tenants by the National Trust vary in character from workshops and cafes to car parks and radio masts. Of the total, just under half are categorised as shops or cafes. The total rateable value of the properties amounts to £336,362.
- 3.5.5 The employment associated with these properties is not known, but it is possible to estimate the likely level by reference to the rateable value. The latter reflects the commercial value of particular activities and the size of the property. The level of employment in terms of jobs per floor space will vary by the use, being most intense for retail and catering activity and very low in respect of other uses such as TV masts. By making assumptions about the average ratio between employment use and rateable value for each type of property, an estimate of the employment impact and costs can be derived. For the purposes of this study, pragmatic estimates based on general studies and experience elsewhere have been adopted, which assume that:
- 1 full time job is likely to be associated per £1,000 of rateable value for café and shop uses.
 - 0.5 FTE jobs are supported per £1,000 rateable value in industrial and storage uses.
 - 0.25 FTE jobs are supported per £1,000 rateable value in car parking and recreational sites.
 - 0.05 FTE jobs are associated per £1,000 of rateable value in relation to TV aerials, Ministry of Defence and other assorted low intensity uses.
- 3.5.6 Using these ratios, it is estimated that the commercial lettings of National Trust owned sites support around 216 full time equivalent jobs in the South West, equivalent to an estimated 246 actual jobs. Details are set out in table 3.6 below. Around £3.4 million is spent on wages supporting these jobs.
- 3.5.7 The total jobs associated with land and property leased by the National Trust to agricultural and commercial tenants is therefore estimated at 1,216 actual jobs or 963 full time equivalent jobs.

Table 3.6 Estimated direct employment associated with NT commercial lettings.

	Premises with rateable value over £500					Rateable value	Associated FTE jobs	Estimated actual jobs
	Industrial /storage	Retail/ catering	Parking/ sport	Other uses	All			
Avon	0	0	0	0	0	0	0	0
Cornwall	2	4	7	5	18	£51,963	16	18
Devon	5	3	1	2	11	£23,277	15	17
Dorset	14	9	1	0	24	£118,344	93	106
Gloucester-shire	0	2	1	1	4	£18,740	17	19
Somerset	1	16	1	1	19	£34,288	15	17
Wiltshire	2	3	3	1	9	£89,750	60	68
South West	24	37	14	10	85	£336,362	216	246
<i>Of which Wessex NT</i>	<i>17</i>	<i>28</i>	<i>5</i>	<i>2</i>	<i>52</i>	<i>£242,328</i>	<i>168</i>	<i>191</i>

3.6 National Trust Tenants supply chain impacts.

3.6.1 Tenants of National Trust land and properties will purchase supplies and services in connection with the use of the tenanted properties. Thus farmers will buy in feedstuffs, seeds and fertiliser as well as incurring vets fees and other costs. Agricultural production will also support additional jobs in downstream activity in food processing and other related sectors. Similarly, commercial operators will in turn also buy in supplies and services in connection with their operations.

3.6.2 A detailed assessment of the actual local linkages has not formed part of this study. However, other studies have sought to generate a view of the multiplier effect of different industry sectors in Devon and Cornwall and in the South West as a whole. In particular, the South West Economic Research Centre¹ at the University of Plymouth has developed an input-output table for the counties in the Region. This suggests that for Devon and Cornwall, the employment multiplier for agriculture activity is 1.214 taking into account both supply chain effects and induced effects arising from the spending of wages by people employed directly or indirectly in agriculture. On this basis, it is assumed that agricultural purchases are likely to have an employment multiplier of around 1.1 at District level, rising to closer to 1.2 at County and regional level. Therefore these multiplier figures have been used for

¹ From "Input-Output Models for the South West Counties" by Eric McVittie, The South West Economy Trends and Prospects, University of Plymouth, tenth edition, 1998.

calculating the additional jobs generated by agricultural tenants purchasing supplies and services in respect of their farming activities on Trust land. In practice, the assumed County multiplier may slightly overstate the impact given that the Research Centre figure also includes induced effects.

- 3.6.3 The same source also provides employment multipliers for manufacturing industry, distribution and other sectors. These vary from as high as 1.436 for industry to 1.159 for distribution. There is only limited information on the nature of the business activities of tenants of Trust properties, and it is likely that the average will fall between the two examples given above. Therefore, for the purpose of this study, the same assumptions as those used for agricultural tenants have been made, i.e. a supply chain multiplier of 1.1 at District Council level rising to 1.2 at County and Regional level.
- 3.6.4 Applying the assumed supply chain multipliers to the estimated direct full time equivalent employment associated with tenanted land and properties suggests that there are a further 172 FTE jobs arising from Tenant purchases in the South West. These jobs will arise primarily in the service sectors, where the average ratio of FTE to actual jobs is recorded as 1:1.14 in the Census of Employment. This would indicate a total of 198 actual jobs arising from tenant purchases. See table 3.7.

	Farm tenants FTE	Farm tenants Actual	Business tenants FTE	Business tenants actual
Avon	3	3	0	0
Cornwall	21	24	2	3
Devon	44	50	2	2
Dorset	35	40	9	10
Gloucestershire	10	11	2	3
Somerset	17	19	2	3
Wiltshire	19	22	6	7
South West	149	170	23	28
<i>Of which Wessex NT</i>	74	84	17	20

3.7 Externality impacts.

- 3.7.1 Apart from the direct and indirect impacts arising from the National Trust and tenants expenditure, additional economic impacts will arise from spending by visitors to the Trusts properties within the South West. In addition to holiday and day visits to gated and ungated sites owned by the Trust in the Region, volunteers staying and working on Trust land and holidaymakers staying in

holiday cottages owned and managed by the Trust will also spend money in the local area.

The impact of NT Volunteer spending.

- 3.7.2 It is estimated that some 6,808 nights were spent by volunteers working on Trust property in the South West . These volunteers will spend money off site in relaxing after their labours. The average level of spending is not known, but is assumed to be relatively low compared to a holidaymaker staying in commercial accommodation. For the purposes of this study, it is assumed that the level and pattern of spending will be similar to that of tourists visiting friends and relatives. The average spend per night for such trips in the West Country in 1997 was £17, resulting in an estimated total spend by volunteers staying in the South West of £115, 736.
- 3.7.3 Using parameters from the Cambridge model economic template² for the West Country, it is estimated that on average, 0.016 FTE jobs are generated per £1,000 of spend in non accommodation businesses benefiting from tourist spending, with a further 0.003 indirect jobs in supply chain businesses. Applying these ratios to the expenditure suggests that volunteer spending supported 2.2 FTE jobs, equivalent to 3 actual jobs. See table 3.8. Although the local economic impact is small, the Trust itself will gain from the labour input onto their estate from the volunteers which would otherwise not be available.

	Number of volunteer nights	Value of volunteer spend	Direct FTE jobs supported	Indirect FTE jobs supported	Total FTE jobs	Total actual jobs
Avon	0	0	0	0	0	0
Cornwall	1186	£20,162	0.32	0.06	0.38	1
Devon	4643	£78,931	1.26	0.24	1.50	2
Dorset	0	£0	0	0	0	0
Gloucestershire	52	£884	0.01	0.00	0.02	0
Somerset	198	£3,366	0.05	0.01	0.06	0
Wiltshire	729	£12,393	0.20	0.04	0.24	0
South West	6808	£115,736	1.84	0.35	2.20	3
<i>Of which Wessex NT</i>	<i>927</i>	<i>£15,759</i>	<i>0.25</i>	<i>0.05</i>	<i>0.30</i>	<i>0</i>

² The Cambridge Economic Model for local area tourism uses data from tourist and business surveys to derive ratios of direct and indirect employment supported at the local level as a result of expenditure by different types of visitor. The model is marketed and administered in England by the Regional Tourist Boards.

The impact of visitor spending by holidaymakers staying in National Trust cottages.

- 3.7.4 There are 132 National Trust owned cottages let on a weekly basis for holidays in the South West. On the basis of the occupancy data supplied by the Trust, it is estimated that these properties hosted 127,623 holiday nights in 1997.
- 3.7.5 The average expenditure per head per night for holidaymakers using self catering accommodation in the West Country in 1997 excluding spending on the accommodation itself is estimated to have been £22.99.³ At this rate of expenditure, it is estimated that some £2,933,633 was spent by holidaymakers staying in NT cottages, excluding the sum paid to the NT to rent the properties. (This latter sum supports direct and indirect employment in the Trust in the management and maintenance of the properties, and its impact has therefore already been accounted for in the totals in sections 3.2 and 3.3 above.)
- 3.7.6 Using the parameters of the number of direct and indirect jobs supported per £1,000 of tourist expenditure outlined in paragraph 3.6.3 above, it is estimated that the expenditure by holidaymakers staying in NT cottages supports some 56 Full Time Equivalent jobs or 79 actual jobs. See table 3.9.

	Number of cottages	Number of visitor nights	Associated spend ex-accommodation	Direct FTE jobs	Indirect FTE jobs	Total FTE jobs	Total actual jobs
Avon	0	0	0	0	0	0	0
Cornwall	85	79,757	£1,833,613	29.34	5.50	34.84	49
Devon	26	25,051	£575,233	9.20	1.73	10.93	16
Dorset	16	16,812	£386,508	6.18	1.16	7.34	10
Gloucestershire	5	6,003	£138,009	2.21	0.41	2.62	4
Somerset	0	0	0	0	0	0	0
Wiltshire	0	0	0	0	0	0	0
South West	132	127,623	£2,933,633	46.93	8.80	55.73	79
<i>Of which Wessex NT</i>	16	16812	386508	6.18	1.16	7.34	10

³ Based on 1997 United Kingdom Tourism Survey data for the West Country Tourist Board Area.

Impact of spending by visitors to National Trust sites.

3.7.8 National Trust sites throughout the South West attract a substantial numbers of day visits from holiday accommodation and from home. These trips engender spending, not only on entrance to and purchases within National Trust sites, but also on catering, shopping, transport and other items en route to and from the sites. In order to estimate the impact of this activity on the local economy, the total spending involved in such trips is required. Estimates have therefore been made of :

- The total number of visits to National Trust sites.
- The number of visitors engaged in these visits divided between visits from home and visits from holiday accommodation.
- The average spend per trip.

In order to provide the basis for these estimates, both survey and modelling techniques have been employed.

Estimating visitor numbers to NT sites.

3.7.9 The number of visits to individual National Trust sites varies widely. Where sites are “gated”, reasonably accurate visit figures are usually available. Of the 68 gated sites identified in the South West, visitor estimates are available for 53 or 77%. However, very few of the ungated sites have existing visitor estimates. Of the 212 sites identified in the South West, local estimates are available for only a handful of sites.

3.7.10 The visitor numbers attracted to any particular site will depend on a number of factors. The main drivers are likely to be:

- The number of holidaymakers and residents within the catchment area of the site.
- The nature of the site, which may range from historic properties to open moorland or coastal areas.
- The level of awareness and perception of its attractiveness amongst potential visitors.

3.7.11 In order to provide a basis for estimating visitor numbers at sites where no figures are available, a “potential surface” was constructed to provide a proxy measure of the strength of the catchment area. The construction of the surface involved:

- The development of a matrix measuring the distance between individual Districts throughout the South West and adjoining areas.
- The development of a decay curve representing the decline in the propensity to visit a particular site with increasing distance based on national survey data from the United Kingdom Day Visit Survey.
- The identification of the resident population and tourist trips within each District included in the matrix.

-
- The generation of an individual score for each District within the South West representing the sum of the potential visitor numbers derived from multiplying the individual population figures by the distance to the target District constrained by the decay curve. A score for day visits from home and from holiday base was generated for each District in the South West.
- 3.7.12 All 280 sites within the Region were classified into one of seven categories, namely:
- Coastline.
 - Historic properties.
 - Monument.
 - Moorland.
 - Woodland.
 - Parkland.
 - Farmland.
- 3.7.13 In order to provide a measure of the relative attractiveness to potential visitors, a “notoriety score” of between 1 and 10 was allocated to each site in consultation with regional officers of the Trust. These scores are intended to reflect both attractiveness and awareness amongst potential visitors.
- 3.7.14 In order to provide additional information, visitor counts were undertaken by volunteers recruited by the Trust on eighteen sites across the Region representing a cross section of sites with different characteristics and notoriety scores (Map 3.1). The site counts were then used as a basis for generating annual estimates for each site. By comparing the total volume of visits to each site with the potential surface scores for the relevant District, a ratio for each type of site was derived. The differences arising for different notoriety scores was calculated for historic properties using information from gated sites, and the differential derived from this exercise were used to calibrate the ratios for different notoriety scores for each type of site.
- 3.7.15 Estimates of the volume of visits to sites where no figures are available were then calculated by applying the appropriate multiplier ratio to the potential surface scores for the District within which the site is located. Given the small number of sites for which counts are available, there is inevitably some element of uncertainty about the estimates, but where local information or other indications suggest serious under or over estimates, then individual estimates have been adjusted on the advice of the relevant Trust officer. The estimates could be further improved if additional site counts are undertaken to increase the sample of sites on which the model information is based. Even so the approach does provide a working estimate for each site in the Region, and the overall results are set out in table 3.10.

	Sites			Estimated visits		
	Gated	Ungated	Total	Gated	Ungated	Total
Avon	6	12	18	382,575	664,300	1,046,900
Cornwall	13	67	80	843,097	3,037,500	3,881,100
Devon	16	52	68	970,067	1,772,000	2,742,100
Dorset	8	26	34	408,423	1,691,100	2,099,400
Gloucestershire	7	25	32	307,483	326,500	634,000
Somerset	11	16	27	358,284	1,041,600	1,399,900
Wiltshire	10	13	23	440,199	539,500	979,700
South West	71	210	281	3,710,128	9,072,500	12,783,100
<i>Of which Wessex NT</i>	35	66	101	1,589,481	3,936,500	5,525,900

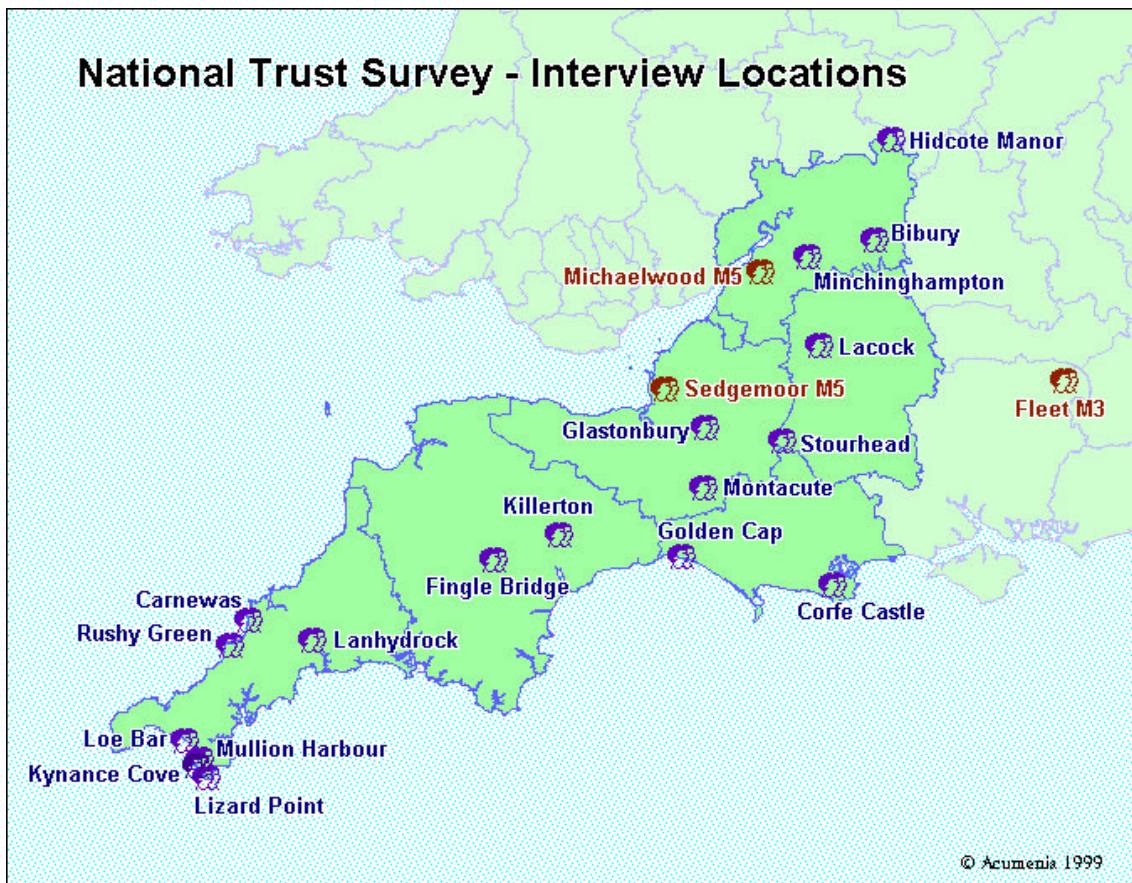
3.7.16 Information on the breakdown between day visits from home and day visits from holiday accommodation was collected in the visitor survey conducted at nineteen sites within the South West (Map 3.2). The potential surface also provides some indication of the relative strength of home based trips compared to holiday based trips. A comparison between the survey data and potential surface scores suggested that although the proportions were very close in Devon and Cornwall, the potential surface tended to overestimate the proportion of holiday based trips to a varying extent in the other counties. A correcting factor was therefore applied in estimating the relative volume of home based trips to holiday based trips for visits in each District.

	Total visits	Visitor days to gated sites		Visitor days to ungated sites		Total visitor days
		Holiday	Resident	Holiday	Resident	
Avon	1,053,236	181,057	139,158	311,343	256,346	887,904
Cornwall	3,880,940	631,721	73,951	2,255,971	286,704	3,248,347
Devon	2,742,115	590,398	221,548	1,291,620	191,584	2,295,150
Dorset	1,887,894	248,863	92,987	1,077,762	337,767	1,757,379
Gloucestershire	633,899	133,725	123,638	142,157	131,053	530,573
Somerset	1,399,823	202,385	97,498	695,496	176,272	1,171,651
Wiltshire	979,667	192,004	176,443	234,485	217,050	819,982
South West	12,577,574	2,180,153	925,223	6,008,834	1,596,776	10,710,986
<i>Of which Wessex NT</i>	5,320,620	824,309	506,086	2,319,086	987,435	4,636,916

MAP 3.1



MAP 3.2



3.7.17 Information on the spending characteristics of visitors to gated and ungated sites was also collected in the visitor survey. The latter also indicated that some individuals visited more than one site on their day trip. Overall, an average of 1.19 NT sites was visited per day trip. Therefore the total number of visitor days associated with visits to NT sites is estimated at just over 10.7 million. See table 3.11.

Visitor spending associated with trips to NT sites.

3.7.18 Information on the expenditure associated with day trips by holiday makers and by residents to gated and ungated sites was collected in the visitor survey. The average spend per day to:

- Gated sites by holidaymakers was £33.24, including £18.75 on accommodation.
- Gated sites by residents was £12.85.
- Ungated sites by holidaymakers was £26.16, including £13.59 on accommodation.
- Ungated sites by residents was £10.04.

3.7.19 By applying the spend figures to the relevant visitor days, it is estimated that the total gross spending associated with day visits to National Trust sites in the South West amounts to over £250 million.

3.7.20 Some of this expenditure will take place on National Trust sites in entrance fees, retail and catering services, which in turn will support jobs on those sites, which have already been accounted for in the discussion on National Trust direct employment impacts. Therefore in seeking to identify the additional impact of visitor spending, it is necessary to identify the value of off-site spending out of the total. Available information from the Trust for the spend on 54 gated sites, broken down into entrance payments, spend on shop and garden sales and on refreshments, was analysed by County to provide an average on site spend per visit. As a result it is estimated that the total off site spend amounted to £245 million. See table 3.12.

	Gross spend	On site spend	Gross off site spend
Avon	18,524,962	880,591	17,644,370
Cornwall	83,843,382	3,302,546	80,540,836
Devon	58,184,004	3,531,965	54,652,039
Dorset	41,052,524	1,582,766	39,469,758
Gloucestershire	11,068,367	1,222,474	9,845,892
Somerset	27,944,073	1,091,574	26,852,499
Wiltshire	16,962,815	1,027,967	15,934,848
South West	257,580,127	12,639,883	244,940,242
<i>Of which Wessex NT</i>	<i>104,484,373</i>	<i>4,582,898</i>	<i>99,901,475</i>

Gross employment arising from off-site expenditure.

- 3.7.21 Having identified the off site spending, the number of jobs arising from this expenditure can be estimated by applying an appropriate employment multiplier. In practice the multiplier will vary depending on the nature of the expenditure. Thus sectors such as catering and accommodation tend to have relatively high multipliers since the proportion of turnover accounted for by wage costs is higher than some other sectors such as shopping where a higher proportion is accounted for by the cost of purchasing supplies. Local transport employment multipliers are also affected by the consideration that a significant proportion of travel expenditure will normally occur at the origin of the trip rather than the destination, e.g. the purchase of rail tickets.
- 3.7.22 Employment multipliers for the five main sectors of tourist expenditure derived from business surveys in a range of English destinations are used in the Cambridge Local Area Tourism Model. Thus direct employment multipliers for FTE jobs per £1,000 spend range from:
- 0.0134 for retailing.
 - 0.0236 for catering.
 - 0.0216 for entertainment / attractions.
 - 0.0265 for accommodation.
 - 0.0071 for travel.
 - 0.0192 for other spend.
- 3.7.23 The visitor survey provided information on the breakdown of visitor expenditure into the main categories set out above enabling an estimate to be made of direct FTE jobs arising in each category. Apart from the direct jobs, additional jobs will arise in the supply chain as businesses in direct receipt of visitor spend purchase goods and services. The level of such supply chain jobs supported locally will vary depending on the structure of the local economy. In general, the number will be higher in cities and urban areas where supply services tend to be concentrated, and lowest in rural areas where most supplies are bought from businesses in adjoining urban areas. The Cambridge model makes use of indirect employment multipliers which vary depending on the character of each District. Therefore the indirect supply chain jobs arising locally have been calculated for each District taking account of its character.
- 3.7.24 The total number of direct FTE jobs arising from off-site spending by visitors to NT sites is estimated at 5,276, with a further 1,145 indirect FTE jobs arising in local suppliers (total 6,421 – see table 3.13). The actual number of jobs will be higher taking into account part time and seasonal working. Again data from the Cambridge model has been used to generate and estimate of actual jobs in each sector. The overall total of actual direct jobs is estimated to be 7,828, with an additional 1,308 indirect local supply chain jobs (total 9,136 – see table 3.13).

	Off-site spend	FTE jobs supported	Actual jobs
Avon	17,644,370	472	670
Cornwall	80,540,836	2112	2,999
Devon	53,116,565	1,459	2,072
Dorset	39,469,758	1,027	1,466
Gloucestershire	9,845,892	247	353
Somerset	26,852,499	699	998
Wiltshire	15,934,848	405	578
South West	244,940,242	6421	9136
<i>Of which Wessex NT</i>	<i>99,901,475</i>	<i>2,603</i>	<i>3,712</i>

Net impact arising from off-site expenditure.

- 3.7.25 In practice, a significant amount of the off-site expenditure and the employment supported by such spending would arise irrespective of the existence of the National Trust sites. Thus people on holiday in the area are likely to have spent the same money whether or not the site existed, and day visitors from homes in the area are likely to have spent similar sums on alternative leisure activities in the area. The net additional impact of the NT sites will only arise if the existence of the site was the primary reason for the day visit.
- 3.7.26 In order to provide a view of the net effect, visitors were asked in the visitor survey as to whether the trip to that site had been pre-planned and the relative importance of that destination to their overall trip. The assumptions made are that:
- Where the trip is pre planned, then it primarily occurred because of the existence of the site visited.
 - The score accorded to the importance would reflect the relative weighting to be accorded to the visit as a proportion of the total trip spend. If the visit is accorded a high score, it is reasonable to assume that it accounted for the main purpose of the day trip, whereas a low score would indicate that it was an ancillary reason rather than the main purpose for the trip. The relative score could therefore be used as a measure of the proportion of the trip expenditure to count as additional.
- 3.7.27 The survey outputs suggested that overall, only 61% of trips undertaken by holidaymakers were pre-planned. The proportion was however much higher in the case of day trips from home, where 92.4% of trips were pre planned. On this basis, some 68% of all trips to National Trust sites are additional to the area.

- 3.7.28 The output from the question on the importance of the visit to the trip was however far less clear, with respondents giving an overall score of 8 out of 10, with little variation between sites irrespective of their size or importance. While the response may be indicative in a general satisfaction with the individual site visits, in practice, the contribution to the overall day trip made by a minor NT site compared to a major site is not likely to be of the same order of importance.
- 3.7.29 Therefore in seeking a measure of the proportion of the trip expenditure to be accorded to the visit to the site, an alternative approach was adopted. The latter assumed that the importance to be attributed to the site would reflect the notoriety score accorded to it. Sites with a low notoriety score are assumed to account for only a small proportion of the trip spend, whereas sites with high notoriety scores were likely to account for a much higher proportion of total trip spend. A pragmatic scale was therefore adopted ranging from the assumption that sites with a notoriety grade of 1 would only account for 1% of the day trip spend rising to 80% of the day trip spend in the case of sites with a notoriety grade of 10.
- 3.7.30 In identifying net effects, a distinction also needs to be made between trips originating within the District and those involving travel into the area. Survey data is not available to determine the relative proportion of trips involving cross boundary travel. However, the potential surface does allow a proxy measure to be made of the relative number of internally generated trips as opposed to those potentially generated from outside the District. In most cases, the proportion of trips coming into any particular District is relatively small, but is more important where there are substantial holiday and/or resident populations in nearby adjoining Districts.
- 3.7.31 The calculation of the net impacts of visitor activity related to National Trust sites therefore involved:
- Attributing the spend on pre-planned trips from outside the District as additional, excluding any spend on accommodation associated with holiday based visits.
 - Discounting any spending by day visitors from home originating in the District.
 - Attributing a proportion of spend from pre planned trips by holidaymakers in the District, with the proportion being based on the relative notoriety score of each site within the District.
- 3.7.32 Using this approach, it is estimated that the overall net additional spending taking place locally as a result of the NT sites amounts to £64 million, supporting some 1,614 FTE jobs equivalent to 2,306 actual jobs. The overall net additional spend is estimated at 25%, although as might be expected there is considerable variation between Counties and Districts. The highest estimated net additionality recorded is for West Somerset with 40% and the lowest is Bristol with 2%. See table 3.14.

Table 3.14 Net impacts of visitors to National Trust sites.					
	% Add visits	Additional spend	Net additionality	Net additional FTE jobs	Net additional actual jobs
Avon	75%	£2,208,725	12%	53	76
Cornwall	64%	£24,058,726	29%	622	888
Devon	67%	£9,322,079	17%	228	326
Dorset	69%	£12,822,603	31%	322	460
Gloucester-shire	76%	£2,862,206	26%	64	91
Somerset	68%	£9,714,054	35%	245	350
Wiltshire	76%	£3,368,890	20%	81	115
South West	68%	£64,357,283	25%	1,614	2306
<i>Of which Wessex NT</i>	<i>71%</i>	<i>£28,114,272</i>	<i>27%</i>	<i>701</i>	<i>1001</i>
Note: the net additionality is the sum of additionality at District level. It will in practice be slightly lower at County level.					

3.8 Induced impacts.

- 3.8.1 The spending of wages by employees whose jobs are supported by tourism will in itself generate further employment locally and elsewhere. The level of these induced impacts will reflect the relative status of the local economy, with greater impacts arising in larger centres where there are a greater range and higher order of services. Thus the induced multiplier in Bristol is likely to be greater than in a more rural area such as Cotswold.
- 3.8.2 Local induced multipliers are not generally available. For the purposes of this study therefore, it is assumed that an additional induced job will arise for every 10 jobs supported either directly or indirectly at District Council area level, with a further induced job arising at County level. See table 3.15.

3.9 Summary of employment impacts.

- 3.9.1 The full impact of the Trust's activities in the South West can now be estimated by summing the effect of each of the six sectors considered above. Overall, the gross impact associated with National Trust activity in the South West supports some 10,913 FTE jobs (table 3.16) and 15,457 actual jobs (table 3.17).

Table 3.15 Employment arising from induced impacts.

	Direct & Indirect FTE	Induced Employment FTE	Actual induced jobs
Avon	100	20	23
Cornwall	1110	222	253
Devon	837	167	190
Dorset	771	154	176
Gloucestershire	329	66	75
Somerset	457	91	104
Wiltshire	617	123	140
South West	4260	852	971
<i>Of which Wessex NT</i>	<i>1,945</i>	<i>388</i>	<i>443</i>

Note: South West Total of Direct and indirect includes additional 40 NT supply chain jobs generated in region but not within the originating county.

Table 3.16 FTE employment arising from the National Trust Activities in the South West.

	NT Direct	NT supply chain	NT tenants	NT tenants supply chain	External impacts	Induced impacts	Total impact
Avon	24	8	12	2	472	104	622
Cornwall	277	62	119	22	2,148	526	3,155
Devon	264	54	233	45	1,472	414	2,482
Dorset	98	34	266	44	1,034	295	1,770
Gloucestershire	158	28	66	11	250	102	615
Somerset	63	16	112	21	699	182	1,093
Wiltshire	274	83	154	25	405	188	1,129
South West	1,158	325	963	171	6,479	1,819	10,913
<i>Of which Wessex NT</i>	<i>458</i>	<i>141</i>	<i>544</i>	<i>92</i>	<i>2,610</i>	<i>769</i>	<i>4,614</i>

Note: External impacts includes gross spending by visitors to NT off-site.

Table 3.17 Actual employment arising from the National Trust Activities in the South West.							
	NT Direct	NT supply chain	NT tenants	NT tenants supply chain	External impacts	Induced impacts	Total impact
Avon	32	9	16	3	670	146	876
Cornwall	505	71	152	27	3,049	761	4,565
Devon	522	62	301	52	2,090	605	3,632
Dorset	162	39	331	50	1,476	412	2,470
Gloucestershire	245	32	82	14	357	146	876
Somerset	128	18	143	22	998	262	1,571
Wiltshire	291	95	190	29	578	237	1,420
South West	1,885	371	1,216	198	9,218	2,569	15,457
<i>Of which Wessex NT</i>	<i>613</i>	<i>161</i>	<i>680</i>	<i>104</i>	<i>3,722</i>	<i>1,057</i>	<i>6,337</i>
Note: External impacts includes gross spending by visitors to NT off-site							

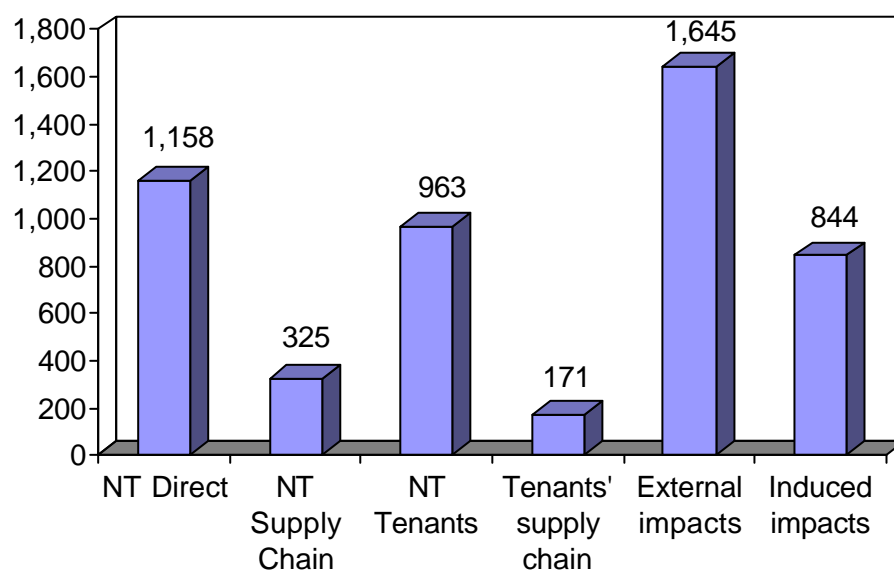
- 3.9.2 However the gross impacts fall to 5,064 FTE jobs and 7,029 actual jobs if only the net effects of off-site expenditure by visitors to National Trust sites is taken into account.
- 3.9.3 The table below (3.18) indicates the distribution of net impacts between the different county areas and for the South West as a whole. In terms of full time job equivalents, for every job employed directly by the National Trust, there are an estimated 3.3 FTE jobs elsewhere in the area.

Table 3.18 FTE employment arising from the National Trust Activities in the South West.

	NT Direct	NT supply chain	NT tenants	NT tenants supply chain	External impacts	Induced impacts	Total impact
Avon	24	8	12	2	53	20	120
Cornwall	277	62	119	22	629	222	1,332
Devon	264	54	233	45	240	167	1004
Dorset	98	34	266	44	329	154	925
Gloucester shire	158	28	66	11	67	66	395
Somerset	63	16	112	21	245	91	548
Wiltshire	274	83	154	25	81	123	740
South West	1,158	325	963	171	1,645	844	5,064
<i>Of which Wessex NT</i>	<i>458</i>	<i>140</i>	<i>544</i>	<i>92</i>	<i>708</i>	<i>388</i>	<i>2,333</i>

Note: External impacts only include the net additional spending for visitors to NT sites.

FTE employment from NT activities (net external effects)



3.10 Summary of expenditure.

3.10.1 The expenditure supporting the jobs detailed in section 3.9 is built upon earlier tables and can be summarised as follows:

Table 3.19 Expenditure supporting gross and additional employment.	
NT spend on wages	£16,424,200
NT suppliers spend on wages	£17,999,800
Agricultural tenants spend on wages	£8,960,500
Business tenants spend on wages	£3,391,800
Spend by tenants on supplies & services	£8,551,000
NT volunteers spend off site	£115,700
Holiday Cottage visitors spend ex-accommodation costs	£2,933,300
Gross visitor spend (ex-spend at NT properties)	£254,622,200
<i>Additional visitor spend (ex-spend at NT properties)</i>	<i>£64,354,900</i>
Total with gross visitor spend	£312,998,900
<i>Total with additional visitor spend</i>	<i>£122,731,600</i>
Note that some of the expenditure figures are specifically on wages while others (volunteers and visitors) include spend on goods or services.	

3.11 Additional visits generated by National Trust properties.

3.11.1 As well as estimates of the effect in terms of expenditure and employment, the study aims to provide an estimate of staying holiday visits to the region motivated by National Trust properties.

3.11.2 The estimated number of holiday visits to Trust properties in the region stands at 8,151,000. Based upon the number of trips to Trust properties per day (1.19 as noted in the survey of visitors) and the average number of Trust sites visited per holiday (2.24, same source), it is possible to estimate the total number of holiday makers who visited South West National Trust properties. Additionally, 61% of visits to Trust sites were pre-planned before

leaving home, which provides an estimate of holiday visitors who were influenced by National Trust properties in making their trip.

- 3.11.3 It is estimated that 4.3 million holiday visitors to the South West visited at least one Trust site and that the visit played a significant part in motivating 2.6 million of these trips.

Table 3.20 Actual employment arising from the National Trust Activities in the South West.

	NT Direct	NT supply chain	NT tenants	NT tenants supply chain	Net External impacts	Induced impacts	Total impact
Avon	32	9	16	3	76	23	159
Cornwall	505	71	152	27	938	253	1,946
Devon	522	62	301	52	344	190	1,471
Dorset	162	39	331	50	470	176	1,228
Gloucester shire	245	32	82	14	95	75	543
Somerset	128	18	143	22	350	104	765
Wiltshire	291	95	190	29	115	140	860
South West	1,885	371	1,216	198	2,388	971	7,029
<i>Of which Wessex NT</i>	<i>613</i>	<i>161</i>	<i>680</i>	<i>104</i>	<i>1,011</i>	<i>443</i>	<i>3,012</i>

Note: External impacts only include the net additional spending for visitors to NT sites

Appendices.

A.1 Visitor numbers to National Trust public properties.

1 Background.

- 1.1 A central requirement of the research was to calculate the number of visitors to National Trust ungated sites. Once the total volume is known, the total value can then be calculated, using the expenditure data collected in the visitor surveys.
- 1.2 Obtaining footfall data at gated sites is straightforward, and the official volume of ticket issues is taken to be correct without supplementary verification.
- 1.3 Data from ungated sites, however, is a very different matter. Beyond ad hoc and piecemeal estimates there is no extant database of National Trust sites available for inspection.
- 1.4 The nearest there has been to a systematic appraisal was for the South West Coast Path initiative of 1995, where annual visitor volumes are given for individual sections of the route. Due the disbanding of the project team it has not been possible to interrogate the dataset directly, or to find out how the counts were conducted and how reliable they were. Table 1 lists the results for NT-owned sections of the route, and where appropriate these are used to calibrate the results of the 'Valuing our environment' counts.
- 1.5 There are 305 NT sites listed in the database set up for this research, covering an area of approximately 117,500 acres. Whilst some are pathways with a single clearly defined entrance and exit, many are large tracts of open land crossed by roads and with extensive access opportunities. Thus not only is defining a 'visit' problematic in conceptual terms, it is also difficult in a practical sense too. Only an automatic footfall counter for a point-access site can give full data for 24 hours a day, 365 days a year. To calculate visitor volume for other sites requires a series of extrapolations as set out below.
 1. Classify all sites into defined categories.
 2. Conduct a programme of visitor counts for a selection of sites within each category. The counts should be as comprehensive as possible, and ideally take place on as many days as possible.
 3. Extrapolate to whole-day totals for each site in the programme.
 4. Extrapolate to whole-year totals for each site in the programme, using weekday / weekend and seasonal averages calibrated for the effect of average weather conditions.

5. Extrapolate to all NT sites, based on their category and calibrated for local conditions such as proximity to major centres of population.
- 1.6 The programme was organised by NT under the direction of TA, using volunteer labour. A standard count sheet was used to ensure compatibility of data, with stress laid on the need to monitor flows in one direction only, so as to avoid 'double counting' visitors as they returned to their starting point.
- 1.7 Due to indifferent weather in the 1998 main season and local difficulties in recruiting volunteers the full schedule of counts was not completed, although by the end of the season an adequate number of counts had been achieved successfully.
- 1.8 As shown in Table 2, counts took place at 18 separate sites on 58 different days, with a total of 183 count-days yielding valid results.
- 1.9 The first site on the alphabetical list is Bibury, and it is used here to explain how the system of extrapolation is put into practice. The other sites are treated in the same way, although with the multi-access sites rather more preparation was required to reach the day total stage.
- 1.10 As shown in Table 3, 11 counts were completed at Bibury, and a total of 8,421 people recorded. Most of the counts were undertaken from 10am to 6pm, and so the first adjustment was to take into account those who would arrive earlier or later - a full day being defined as 8am to 8pm.
- 1.11 The days on which the counts took place are defined in two ways. Firstly, as being either a weekday or a weekend-day (including Bank Holidays). Secondly, days are defined by the season in which they fall. 'High Season' is taken to be June through September, 'Low Season' December through March, and 'Mid Season' the remaining four shoulder months.
- 1.12 The importance of these divisions is that each category is hypothesised to have different average visitor volumes. Partly this is a reflection of holiday and leisure time, and partly the weather. Counts did not take place on wet days, as attendance would be close to zero. As such, the average number of wet days in each season needs to be accounted for. The weather calibration figures used here are based on data from an amateur weather station in Devon, and suffice as a regional average.
- 1.13 A six-fold typology of day types is the minimum necessary for a reasonable degree of differentiation. Even at a site such as Bibury, where most of the scheduled days were completed, it still means that there is no data for calculating the average scores in three of the six cells. The values for the missing cells are derived from the observed ratios between weekdays and weekend-days, and between High and Mid Seasons. These are calibrated to reflect holiday and leisure time availability, in line with national countryside visit data taken from the *ETB Day Visits Survey 1994 and 1996*. Because no counts could be undertaken in the Low Season (being outside of the timeframe available for fieldwork), these too have are calibrated on the assumption that the local weather and national day visits data are valid.

- 1.14 For each cell (type of day and type of season), the average of the observed counts (or extrapolated counts if no observed ones were available) was multiplied by the appropriate number of days and the visit calibration factor. Putting all this together gives an annual visitor volume total for Bibury of 124,000 people. Of this, 32% occurred during High Season weekdays and 24% on High Season weekend-days. The Mid Season accounted for 26% of volume, and the Low Season 18%.

Appendix 1 - Table 1.

South West Coast Path volume estimates on sections owned by the National Trust, 1995.

Site	Location	District	Type	NT owned	Annual Volume	Type Average
North Hill	W of Minehead	W Somerset	Centre of population	Edge	11487	26693
Countisbury Common	Watersmeet	N Devon	Remote	Yes	5373	9408
Near Combe Martin	Combe Martin	N Devon	Resort village	Yes?	16399	25078
Croyde	Croyde	N Devon	Resort town	Close	45479	25078
Westward Ho!	Westward Ho!	Torridge	Resort town	Close	24217	25078
Clovelly	Clovelly	Torridge	Honeypot site	Close?	6894	50724
Shipload Bay	E of Hartland Pt	Torridge	Less popular location	Yes	3262	10165
Beeny	N of Boscastle	N Cornwall	Remote	Close	3813	9408
Rocky Valley	Tintagel	N Cornwall	Less popular location	Yes?	18980	10165
Chapel Porth	St. Agnes	Carrick	Less popular location	Yes	13307	10165
Carbis Bay	St. Ives	Penwith	Resort town	Close	18862	25078
Zennor	Zennor	Penwith	Remote	Yes	27326	9408
Sennen Cove	Sennen Cove	Penwith	Honeypot site	Close	62556	50724
Porthleven	Porthleven	Kerrier	Resort town	Yes?	19178	25078
Lizard Point	Lizard	Kerrier	Honeypot site	Close	49570	50724
Nare Head	Portloe	Carrick	Less popular location	Yes	6941	10165
Talland Bay	Polperro	Caradon	Honeypot site	Close	47673	50724
Wembury	Wembury	South Hams	Less popular location	Yes	17198	10165
Torcross	Torcross	South Hams	Honeypot site	Close	13544	50724
Branscombe	Branscombe	East Devon	Less popular location	Yes	10107	10165
Ware	Lyme Regis	East Devon	Resort town	Close	13083	25078
West Bexington	Abbotsbury	W Dorset	Less popular location	Close	10156	10165
St. Albans Head	Worth Matravers	Purbeck	Remote	Close	9870	9408
The Foreland	Studland	Purbeck	Less popular location	Yes	55264	10165
Hardy's Monument	Portesham	W Dorset	Remote	Yes	5482	9408

Appendix 1 - Table 2.

National Trust Visitor Count programme.

Site	Name		Type		Acres	Notoriety													
1	Bibury (Cotswold, Severn)		Historic property		<1	8													
2	Cadbury Camp (North Somerset)		Monument/archaeology		39	n/k													
3	Chapel Porth (Restormel, Cornwall)		Beach		359	7													
4	Cley Hill (West Wiltshire, Wessex)		Moor/Heath/Downland		66	7													
5	Dumpdon Hill (East Devon, Devon)		Moor/Heath/Downland		62	2													
6	Figsbury Ring (Salisbury, Wiltshire)		Monument/archaeology		27	4													
7	Glastonbury Tor (Mendip, Wessex)		Monument/archaeology		73	10													
8	Gunwalloe Cove (Lizard, Cornwall)		Beach		294	5													
9	Little Dartmouth (South Hams, Devon)		Coastline		165	4													
10	Loe Bar (Lizard, Cornwall)		Coastline		1618	5													
11	Mullion Harbour (Lizard, Cornwall)		Coastline		17	6													
12	Newark Park (Stroud, Severn)		Parkland		643	1													
13	Poltescoe (Cornwall)		Coastline		162	4													
14	Ringstead Bay (West Dorset, Wessex)		Coastline		454	3													
15	Saltram Park (Plymouth, Devon)		Parkland		470	2													
16	St. Anthony Head (Roseland, Cornwall)		Coastline		66	6													
17	Vallency Valley (Boscastle, Cornwall)		Woodland		139	5													
18	Watersmeet (Exmoor, Devon)		Woodland		2040	6													
Day	Date	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
APRIL																			
Sun	19 Apr	✓				✓										✓			✓
Sun	26 Apr												✓						
MAY																			
Sun	17 May									✓									
Mon	25 May	✓		✓						✓	✓	✓	✓	✓				✓	✓
JUNE																			
Wed	03 Jun			✓													✓		
Sat	06 Jun	✓		✓		✓					✓	✓		✓		✓		✓	✓
Sun	07 Jun																✓		
Tue	09 Jun								✓										
Wed	10 Jun																✓		
Sun	14 Jun																✓		
Tue	16 Jun								✓										
Wed	17 Jun																✓		
Sat	20 Jun												✓						
Sun	21 Jun																✓		
Tue	23 Jun								✓										
Wed	24 Jun																✓		
Sun	28 Jun																✓		
Tue	30 Jun	✓		✓		✓				✓	✓	✓	✓	✓		✓		✓	✓
JULY																			
Wed	01 Jul																✓		
Sun	05 Jul																✓		
Tue	07 Jul								✓										
Sat	11 Jul																✓		

Jay	Date	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Wed	15 Jul																✓		
Sat	18 Jul	✓		✓		✓				✓	✓	✓		✓		✓		✓	
Tue	21 Jul								✓										
Wed	22 Jul																✓		
Sat	25 Jul												✓				✓		
Sun	26 Jul	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓		✓	✓				
Tue	28 Jul								✓										
Wed	29 Jul																✓		
AUGUST																			
Sat	01 Aug																✓		
Sun	02 Aug								✓				✓						
Tue	04 Aug		✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓		✓		✓	
Wed	05 Aug																✓		
Sat	08 Aug																✓		
Sun	09 Aug								✓										
Tue	11 Aug								✓										
Wed	12 Aug																✓		
Sat	15 Aug	✓	✓	✓				✓			✓	✓	✓	✓	✓	✓	✓	✓	✓
Sun	16 Aug								✓										
Tue	18 Aug	✓							✓										
Sun	30 Aug								✓										
Mon	31 Aug	✓	✓	✓			✓	✓		✓	✓	✓		✓	✓			✓	
SEPTEMBER																			
Wed	02 Sep																✓		
Thu	03 Sep		✓	✓	✓	✓		✓			✓	✓		✓	✓			✓	
Sun	06 Sep								✓								✓		
Wed	09 Sep																✓		
Sun	13 Sep																✓		
Tue	15 Sep	✓	✓	✓	✓	✓		✓		✓	✓	✓	✓	✓	✓		✓	✓	
Wed	16 Sep						✓										✓		
Tues	22 Sep																✓		
Wed	23 Sep															✓	✓		
Sun	27 Sep																✓		
Tue	29 Sep																✓		
Wed	30 Sep																✓		
OCTOBER																			
Fri	02 Oct																✓		
Sat	03 Oct	✓	✓	✓	✓	✓	✓	✓		✓		✓		✓	✓	✓		✓	
Tues	06 Oct																✓		
Wed	07 Oct																✓		
Sat	10 Oct																✓		
Sun	11 Oct																✓		
Tues	13 Oct																✓		
Wed	14 Oct																✓		
YEAR																			
TOTAL		11	7	11	5	8	4	7	15	9	10	11	9	11	6	8	38	10	3

Appendix 1 - Table 3.

Volume estimates for Bibury.

Date	Date type	Times counted	Weather	Total	Calculation for full day (0800-2000)
19 April	Mid, weekend	1000-1600	Cool, wet later	415	450
25 May	Mid, weekend	1000-1800	Cool, sun later	1087	1150
06 June	High, weekend	1000-1800	Cloudy, mild	697	740
30 June	High, weekday	1000-1800	Cloudy, mild	522	560
18 July	High, weekend	1000-1800	Sunny spells	706	750
26 July	High, weekend	1000-1800	Sunny spells	1245	1340
15 August	High, weekend	1000-1800	Hot, sunny	1130	1220
18 August	High, weekday	1000-1800	Cool, sunny	579	620
31 August	High, weekend	1000-1800	Cloudy, mild	1139	1210
15 September	High, weekday	1000-1700	Cloudy, mild	462	520
03 October	Mid, weekend	1000-1600	Sunny spells	439	470
Season	Months	Weekdays	Weekends & Bank Holidays	Countryside visit calibration	Weather reliability
High	Jun, Jul, Aug, Sep	86	36	100%	80%
Mid	Apr, May, Oct, Nov	85	37	80%	65%
Low	Dec, Jan, Feb, Mar	86	35	75%	50%
Season	Type	Days	Visitor average	Calibration factor	Visitor total
High	Weekday	86	570	0.80	39200
High	Weekend	36	1050	0.80	30300
Mid	Weekday	85	(570)	0.32	15500
Mid	Weekend	37	690	0.65	16600
Low	Weekday	86	(570)	0.23	11300
Low	Weekend	35	(690)	0.47	11300
Year total					124100

Appendix 1 - Table 4.					
Volume estimates for all count sites.					
Season	Type	Days	Visitor average	Calibration factor	Visitor total
High	Weekday	86	570	0.80	39200
High	Weekend	36	1050	0.80	30300
Mid	Weekday	85	(570)	0.32	15500
Mid	Weekend	37	690	0.65	16600
Low	Weekday	86	(570)	0.23	11300
Low	Weekend	35	(690)	0.47	11300
BIBURY				Year total	124200
High	Weekday	86	30	0.80	2000
High	Weekend	36	55	0.80	1600
Mid	Weekday	85	(30)	0.31	800
Mid	Weekend	37	35	0.65	800
Low	Weekday	86	(30)	0.22	600
Low	Weekend	35	(35)	0.47	600
CADBURY CAMP				Year total	6400
High	Weekday	86	170	0.80	11700
High	Weekend	36	245	0.80	7100
Mid	Weekday	85	(170)	0.27	3900
Mid	Weekend	37	135	0.65	3200
Low	Weekday	86	(170)	0.19	2800
Low	Weekend	35	(135)	0.47	2200
CHAPEL PORTH				Year total	30900
High	Weekday	86	55	0.80	3800
High	Weekend	36	215	0.80	6200
Mid	Weekday	85	(55)	0.23	1100
Mid	Weekend	37	100	0.65	2400
Low	Weekday	86	(55)	0.16	800
Low	Weekend	35	(100)	0.47	1600
CLEY HILL				Year total	15900

Season	Type	Days	Visitor avg	Calibration	Visitor total
High	Weekday	86	10	0.80	700
High	Weekend	36	15	0.80	400
Mid	Weekday	85	(10)	0.16	300
Mid	Weekend	37	5	0.65	
Low	Weekday	86	(10)	0.12	200
Low	Weekend	35	(5)	0.47	
DUMPDON HILL				Year total	1600
High	Weekday	86	60	0.80	4100
High	Weekend	36	135	0.80	3900
Mid	Weekday	85	(60)	0.27	1500
Mid	Weekend	37	80	0.65	1900
Low	Weekday	86	(60)	0.21	1100
Low	Weekend	35	(80)	0.47	1300
FIGSBURY RING				Year total	13800
High	Weekday	86	660	0.80	45400
High	Weekend	36	1050	0.80	30200
Mid	Weekday	85	(660)	0.21	12000
Mid	Weekend	37	460	0.65	11100
Low	Weekday	86	(660)	0.15	8700
Low	Weekend	35	(460)	0.47	7600
GLASTONBURY TOR				Year total	115000
High	Weekday	86	330	0.80	22700
High	Weekend	36	640	0.80	18400
Mid	Weekday	85	(330)	0.39	11000
Mid	Weekend	37	(640)	0.52	12300
Low	Weekday	86	(330)	0.28	8000
Low	Weekend	35	(640)	0.38	8400
GUNWALLOE COVE				Year total	80800
High	Weekday	86	95	0.80	6500
High	Weekend	36	155	0.80	4500
Mid	Weekday	85	(95)	0.25	2000
Mid	Weekend	37	80	0.65	1900
Low	Weekday	86	(95)	0.18	1500
Low	Weekend	35	(80)	0.47	1300
LITTLE DARTMOUTH				Year total	17700

Season	Type	Days	Visitor avg	Calibration	Visitor total
High	Weekday	86	195	0.80	13400
High	Weekend	36	290	0.80	8300
Mid	Weekday	85	(195)	0.39	6500
Mid	Weekend	37	(290)	0.52	5600
Low	Weekday	86	(195)	0.28	4700
Low	Weekend	35	(290)	0.38	3800
LOE BAR				Year total	42300
High	Weekday	86	460	0.80	31600
High	Weekend	36	805	0.80	23200
Mid	Weekday	85	(460)	0.19	7500
Mid	Weekend	37	315	0.65	7600
Low	Weekday	86	(460)	0.14	5400
Low	Weekend	35	(315)	0.47	5200
MULLION HARBOUR				Year total	80500
High	Weekday	86	5	0.80	300
High	Weekend	36	10	0.80	300
Mid	Weekday	85	(5)	0.24	200
Mid	Weekend	37	5	0.65	
Low	Weekday	86	(5)	0.18	200
Low	Weekend	35	(5)	0.47	
NEWARK PARK				Year total	1000
High	Weekday	86	80	0.80	5500
High	Weekend	36	100	0.80	2900
Mid	Weekday	85	45	0.35	1300
Mid	Weekend	37	75	0.65	1800
Low	Weekday	86	(45)	0.35	1400
Low	Weekend	35	(75)	0.47	1200
POLTESCOE				Year total	14100
High	Weekday	86	125	0.80	8600
High	Weekend	36	400	0.80	11500
Mid	Weekday	85	(125)	0.12	1300
Mid	Weekend	37	100	0.65	2400
Low	Weekday	86	(125)	0.09	1000
Low	Weekend	35	(100)	0.47	1600
RINGSTEAD BAY				Year total	26400

Season	Type	Days	Visitor avg	Calibration	Visitor total	
High	Weekday	86	1175	0.80	80800	
High	Weekend	36	2230	0.80	64200	
Mid	Weekday	85	(1175)	0.31	30800	
Mid	Weekend	37	1410	0.65	33900	
Low	Weekday	86	(1175)	0.22	22500	
Low	Weekend	35	(1410)	0.47	23100	
SALTRAM PARK					Year total	255300
High	Weekday	86	175	0.80	12000	
High	Weekend	36	225	0.80	6500	
Mid	Weekday	85	85	0.65	4700	
Mid	Weekend	37	155	0.65	3700	
Low	Weekday	86	(85)	0.35	2600	
Low	Weekend	35	(155)	0.47	2600	
ST.ANTHONY HEAD					Year total	32100
High	Weekday	86	90	0.80	6200	
High	Weekend	36	160	0.80	4600	
Mid	Weekday	85	(90)	0.39	3000	
Mid	Weekend	37	(160)	0.52	3100	
Low	Weekday	86	(90)	0.28	2200	
Low	Weekend	35	(160)	0.38	2100	
VALLENCY VALLEY					Year total	21200
High	Weekday	86	630	0.80	43300	
High	Weekend	36	1105	0.80	31800	
Mid	Weekday	85	(630)	0.35	18700	
Mid	Weekend	37	790	0.65	19000	
Low	Weekday	86	(630)	0.25	13600	
Low	Weekend	35	(790)	0.47	13000	
WATERSMEET					Year total	139400

- 1.15 In terms of comparison with SWCP data, much of the usage of the path was around the 10,000 visitors per annum mark, with honeypot points much higher (such as Lizard Point at 50,000). Countisbury Common (Watersmeet) was one of the lowest, at under 6,000. These figures may seem low in comparison to those calculated here, but clear comparison is difficult, not least because the NT sites are areas rather than linear features. However, that a site such as Poltescoe does emerge here with no more than 8,000 people p.a. does indicate that there is a baseline similarity.

- 1.16 Following the visitor counts, the figures were extrapolated across to the remaining National Trust properties where no other information on visitor numbers was available (see section 3 earlier in this report for details). The following tables give the individual site details and the county/NT region totals. In broad terms the overall figures are judged to be correct (although slightly conservative) although there may be inaccuracies at a site by site level. Some of the figures have been amended and may vary from summaries elsewhere in this report.

Appendix 1 – Table 5 Visitor numbers at National Trust properties in the South West, grouped by county.			
Name	Type	Annual visits	District
Avon Gated Properties			
Dyrham Park	Historic Property	84705	South Glos
Horton Court	Historic Property	12420	South Glos
Clevedon Court	Historic property	13097	North Somerset
Westbury College	Historic Property	30660	Bristol
Prior Park	Historic property	95620	Bath & NES
Bath Assembly Rooms	Historic property	146073	Bath & NES
Avon Ungated Properties			
Frenchay Moor	Moor/heath	4554	South Glos
Blaise Hamlet	Historic properties in village	12420	South Glos
Cadbury Camp	Monument/archaeology	6400	North Somerset
Dolebury Warren, Churchill	Monument/archaeology	7686	North Somerset
Failand	Farmland	427	North Somerset
Middle Hope (Woodspring) & Sand Point, Kewstoke	Moor/heat/downland	4697	North Somerset
Monk's Steps, Kewstoke	Coastline	11102	North Somerset
Redcliffe Bay	Coastline	11102	North Somerset
Leigh Wood	Woodland	78694	Bristol
Shire Hampton Park	Parkland	494648	Bristol
Bath Skyline	Woodland/farmland	23222	Bath & Nes
Solsbury Hill	Moor/downland	15709	Bath & Nes
Cornwall Gated Properties			
Antony House	Historic property	18623	Caradon
Antony House Garden	Garden	11458	Caradon
Cotehele House & Garden & Mill	Historic property	72427	Caradon
Cornish Engines	Monument	12285	Kerrier
Godolphin	Historic property	4500	Kerrier
Glendurgan Garden	Garden	58700	Kerrier
Lanhydrock	Historic property	166629	North Cornwall
Lawrence House, Launceston	Historic property	67900	North Cornwall
Trengwainton	Garden	33817	Penwith
Trerice	Historic property	50673	Restormel
St Michael's Mount	Historic property	200,000	Penwith
Trelissick	Garden	94,000	Carrick
Tintagel Post Office	Historic property	41,000	North Cornwall

Cornwall Ungated Properties			
Bodigga Cliff	Coastline	8762	Caradon
Cadsonbury	Monument/archaeology	6066	Caradon
Cotehele Estate	Woodland	38755	Caradon
Erth Barton And Erth Island	Coastline	8762	Caradon
Fowey	Coastline	56616	Caradon
Hore Point	Coastline	18198	Caradon
Pencarrow Head, Llansalos, Lantic Bay And Lantivet Bay	Coastline	56616	Caradon
Polperro	Coastline	85935	Caradon
St George's Island (Looe Island)	Coastline	8762	Caradon
Whitesand Bay	Coastline	41114	Caradon
Chapel Porth	Beach	30900	Carrick
Fal Estuary	Coastline	12220	Carrick
Porthcurnick	beach	25380	Carrick
St Agnes	Coastline	57340	Carrick
St Antony Head	Coastline	32100	Carrick
St Just In Roseland	Enclosed farmland	2820	Carrick
St Mawes	Enclosed farmland	2820	Carrick
Tregassick And Trewince	Coastline	25380	Carrick
Tregellas	Enclosed farmland	470	Carrick
Nare Head, Treluggan, Pendower Beach	Coastline	57340	Carrick
Godrevy To Portreath	Coastline	37332	Kerrier
Gunwalloe Church Cove	Beach	80800	Kerrier
Helford River (x-Glendurgan)	Coastline	91800	Kerrier
Kynance	Coastline	91800	Kerrier
Mullion Cove	Coastline	80500	Kerrier
Poldhu	Beach	37332	Kerrier
Poltesco Cove	Coastline	14100	Kerrier
Lizard Point	Coastline	200,000	Kerrier
Inglewidden	Coastline	16524	Kerrier
Bass Point	Coastline	37332	Kerrier
The Loe And Penrose Inc Gunwalloe Fishing Cove	Coastline	42300	Kerrier
Trevellas Cliff	Coastline	16524	Kerrier
Booby's Bay	Coastline	12610	North Cornwall
Boscastle Harbour	Historic property	93120	North Cornwall
Boscastle Coastline	Coastline	59170	North Cornwall
Valency Wood (Boscastle)	Woodland	21200	North Cornwall
Camel Estuary	Coastline	26190	North Cornwall
Crackington Haven	Coastline	59170	North Cornwall
Dannonchapel Farm	Coastline	12610	North Cornwall
Duckpool To Sandymouth	Beach	59170	North Cornwall
Lanhydrock Estate	Woodland	114460	North Cornwall
Maer Cliff, Bude	Coastline	26190	North Cornwall
Morwenstow	Coastline	59170	North Cornwall
Northcott Mouth	Coastline	26190	North Cornwall

Port Gaverne	Coastline	59170	North Cornwall
Porthcothan	Coastline	26190	North Cornwall
Rough Tor	Moor/heath	24735	North Cornwall
Tintagel	Coastline	45808	North Cornwall
Tregardock Beach	Coastline	26190	North Cornwall
Treharrock	Enclosed farmland	970	North Cornwall
Chapel Carn Brea	Moor/heath	10534	Penwith
Cudden Point	Coastline	11908	Penwith
Lanyon Quoit	Monument/archaeology	64120	Penwith
Lesceave Cliff & Rinsey Cove	Coastline	11908	Penwith
Porthminster Point	Coastline	24732	Penwith
St Michael's Mount	Historic property	202585	Penwith
Trencrom Hill	Monument/archaeology	28396	Penwith
Zennor Coast	Coastline	116790	Penwith
St Just Coast(Levant To Cape Cornwall)	Coastline	76944	Penwith
Porthcurno & Penberth	Coastline	116790	Penwith
Trenow	Coastline	11908	Penwith
Black Head	Coastline	40500	Restormel
Bodrugan's Leap	Coastline	19500	Restormel
Bedruthan (Carnewas & Park Head)	Coastline	225000	Restormel
Crantock & Holywell (Includes Cubert & The Gannel)	Coastline	126000	Restormel
The Dodman	Coastline	40500	Restormel
Pentire Head And Portquin Bay	Coastline	126000	Restormel
Trevarrian, Bre-Pen Farm	Coastline	19500	Restormel
Devon Gated Properties			
A La Ronde	Historic property	26043	East Devon
Branscombe: Village Properties	Historic property	34844	East Devon
Shute Barton	Historic property	2321	East Devon
Killerton House	Historic property	129004	Mid Devon
Killerton Garden	Garden	224300	Mid Devon
Knightshaves Court	Historic property	80185	Mid Devon
Arlington Court: House	Historic property	66317	North Devon
Saltram	Historic property	60313	Plymouth
Salcombe: Overbecks	Garden	49654	South Hams
Bradley	Historic property	1757	Teignbridge
Compton Castle	Historic property	14331	Teignbridge
Buckland Abbey	Historic property	73139	West Devon
Castle Drogo	Historic property	108100	West Devon
Finch Foundry	Historic property	15685	West Devon
Lydford Gorge	Woodland	75380	West Devon
Widecombe In The Moor, Church House	Historic property	8694	West Devon
Devon Ungated Properties			
Branscombe	Coastline	30348	East Devon
Exmouth	Coastline	14612	East Devon
Sidmouth	Coastline	68564	East Devon

Branscombe: Village	Farmland	562	East Devon
Lympstone	Farmland	562	East Devon
Loughwood Meeting House	Historic property	16860	East Devon
Dumpdon Hill, Luppitt	Moor/heath/downland	1600	East Devon
Rockbeare Hill	Moor/heath/downland	2810	East Devon
Coombe Wood, Coombe Raleigh	Woodland	5620	East Devon
Killerton: Estate	Farmland	500	Mid Devon
Old Blundell's School	Historic property	3000	Mid Devon
Witleigh	Woodland	1700	Mid Devon
Arlington Court: Estate	Parkland	339284	North Devon
Golden Cove, Berrynarbor	Coastline	18226	North Devon
The Great And Little Hangman	Coastline	37854	North Devon
Heddon Valley: Heddon's Mouth - Coast	Coastline	37854	North Devon
Holdstone Down	Coastline	18226	North Devon
Ifracombe	Coastline	37854	North Devon
Lee To Croyde	Coastline	85522	North Devon
Lynmouth: Foreland Point, Countisbury Hill And Watersmeet - Coast	Coastline	117768	North Devon
Woody Bay	Coastline	18226	North Devon
Lee To Croyde: Farmland	Farmland	2103	North Devon
Heddon Valley: Heddon's Mouth - Woodland	Woodland	35751	North Devon
Lynmouth: Foreland Point, Countisbury Hill And Watersmeet - Wood	Woodland	139400	North Devon
Plym Bridge Woods	Woodland	8959	Plymouth
Saltram: Estate	Parkland	255300	Plymouth
Wembury Bay And Yealm Estuary	Coastline	28458	Plymouth
Avon Estuary To Erme: Coastline	Coastline	13416	South Hams
Salcombe	Coastline	62952	South Hams
Avon Estuary To Erme: Farmland	Farmland	1032	South Hams
Beesands Cliff	Coastline	13416	South Hams
Bigbury On Sea, Clematon Hill	Coastline	13416	South Hams
Salcombe: Farmland	Farmland	1548	South Hams
South Milton	Coastline	27864	South Hams
Dart Estuary: Footpaths	Coastline	27864	South Hams
Dart Estuary: Woodland	Woodland	17700	South Hams
Bradley Wood/Park	Woodland	8551	Teignbridge
Holne Woods	Woodland	8551	Teignbridge
Little Haldon	Moor/heath	2515	Teignbridge
Parke, Bovey Tracey	Woodland	17102	Teignbridge
Teign Valley Woods	Woodland	17102	Teignbridge
Brixham, Southdown Cliffs	Coastline	54864	Torbay
Dunsland	Moor/heath/downland	2156	Torridge
Bideford Bay: Near Kipling Tors	Coastline	10584	Torridge

Bideford Bay: Cliffland	Coastline	5096	Torrige
Bideford Bay: Farmland	Farmland	196	Torrige
Lundy	Coastline	58800	Torrige
Welcombe And Marsland Mouths	Coastline	5096	Torrige
Hembury	Woodland	2737	West Devon
Hentor, Willings Walls And Trowlesworthy Warrens	Moor/heath	66332	West Devon
Milfordleigh Plantation	Woodland	2737	West Devon
Wheal Betsy	Monument/archaeology	2898	West Devon
Dorset Gated Properties			
Browsea Island	Woodland	89549	Poole
Clouds Hill	Historic property	13446	Purbeck
Corfe Castle	Historic property	174500	Purbeck
Hardy Monument	Monument/archaeology	4510	West Dorset
Hardy's Cottage,	Historic property	16635	West Dorset
Max Gate	Historic property	12639.2	West Dorset
White Mill	Historic Property	5750	West Dorset
Kingston Lacy House	Historic property	91394	East Dorset
Dorset Ungated Properties			
Hod Hill	Moor/heath/downland	1430	North Dorset
Melbury And Fontmell Estate	Moor/heath/downland	8320	North Dorset
Ringmoor: Turnworth Down	Moor/heath/downland	2990	North Dorset
Belle Vue Farm	Farmland	340	Purbeck
Corfe Castle Estate	Farmland	4080	Purbeck
Corfe Castle Estate	Moor/heath/downland	34680	Purbeck
Creech: Grange Arch	Moor/heath/downland	3740	Purbeck
Studland (Corfe Castle Estate)	Coastline	1000000	Purbeck
Whitecliff Farm & Ballard Down	Coastline	41480	Purbeck
Burton Bradstock	Moor/heath/downland	5698	West Dorset
The Cerne Giant	Monument/archaeology	88578	West Dorset
Coney's Castle	Moor/heath/downland	5698	West Dorset
Crook Hill: Beaminster	Moor/heath/downland	5698	West Dorset
Eggardon Hill	Moor/heath/downland	5698	West Dorset
Golden Cap Estate	Coastline	63196	West Dorset
Golden Cap Estate: Farmland	Farmland	4662	West Dorset
Lambert's Castle Hill	Moor/heath/downland	5698	West Dorset
Lewesdon Hill	Woodland	5180	West Dorset
Lyme Regis: Ware Cliffs	Coastline	27972	West Dorset
Pilsdon Pen	Moor/heath/downland	5698	West Dorset
Ringstead Bay	Coastline	26400	West Dorset
Tolpuddle: Martyr's Tree	Monument/archaeology	104636	West Dorset
West Bexington	Coastline	13468	West Dorset
Winyard's Gap	Woodland	8806	West Dorset
Kingston Lacy Estate	Farmland	5325	East Dorset

Gloucestershire Gated Properties			
Chedworth Roman Villa	Monument/archaeology	56852	Cotswold
Hidcote Manor Garden	Garden	124532	Cotswold
Newark Park: Hunting Lodge	Historic property	2628.8	Cotswold
Wotton Under Edge: Ald Grange	Garden	3910	Stroud
Ashleworth Tithe Barn	Historic property	16802	Tewkesbury
Hailes Abbey	Monument/archaeology	23314	Tewkesbury
Snowhill Manor	Historic property	79444	Tewkesbury
Gloucestershire Ungated Properties			
Bibury	Historic property	124200	Cotswold
Campden Properties: Market Hall, Chipping Campden	Historic property	81408	Cotswold
Campden Properties: The Coneygree	Farmland	424	Cotswold
Campden Properties: Dover's Hill	Moor/heath/downland	4664	Cotswold
Newark Park:	Woodland/farmland	7208	Cotswold
Sherborne Park	Woodland	21624	Cotswold
Sherborne Park: Farmland	Farmland	1272	Cotswold
Eden's Hill	Woodland	3621	Forest of Dean
May Hill	Moor/heath/downland	10863	Forest of Dean
Westbury Court Garden	Garden	16401	Forest of Dean
Coaley Peak	Moor/heath/downland	2530	Stroud
Ebworth, Blackstable Wood	Woodland	3910	Stroud
Ebworth, Frith, Rough Park, Saltridge Hill, Worgan's Woods	Woodland	3910	Stroud
Ebworth, Lord's And Lady's Woods	Woodland	3910	Stroud
Ebworth, Overtown Farm	Farmland	460	Stroud
Ebworth, Workman's Wood	Woodland	3910	Stroud
Painswick: Little Fleece	Historic property	6900	Stroud
Painswick: Plantation	Woodland	3910	Stroud
Stroud Properties: Minchinhampton And Rodborough Commons	Moor/heath/downland	5290	Stroud
Stroud Properties: Harefield Hill, Stockend, Watledge	Woodland	7820	Stroud
Stroud Properties: Woodchester Park	Woodland	4830	Stroud
Wotton Under Edge: Westridge Woods	Woodland	3910	Stroud
Wotton Under Edge: Coombe Road Footpath	Farmland	230	Stroud
Wotton Under Edge, Farmland	Farmland	230	Stroud
Crickley Hill	Moor/heath/downland	2981	Tewkesbury

Somerset Gated Properties			
West Pennard Court Barn	Historic property	11250	Mendip
Coleridge Cottage	Historic property	2507	Sedgemoor
King John's Hunting Lodge, Axbridge	Historic property	8883	Sedgemoor
Barrington Court	Garden	54119	South Somerset
Lytes Cary Manor	Historic property	9829	South Somerset
Martock: The Treasurer's House	Historic property	522	South Somerset
Montacute	Historic property	95340	South Somerset
Muchelney: Priest's House	Historic property	7530	South Somerset
Tintinhull House Garden	Garden	22104	South Somerset
Dunster Castle	Historic property	116200	West Somerset
Dunster Working Watermill	Historic property	30000	West Somerset
Somerset Ungated Properties			
Ebbor Gorge	Woodland	12750	Mendip
Glastonbury Tor	Monument/archaeology	115000	Mendip
Wells: Tor Hill	Moor/Heat/Downland	4125	Mendip
Brean Down	Coastline	59658	Sedgemoor
Brent Knoll	Monument/archaeology	17604	Sedgemoor
Cheddar Cliffs	Moor/Heat/Downland	100734	Sedgemoor
Crook Peak, Wavering Down And Shute Shelve Hill	Moor/Heat/Downland	13692	Sedgemoor
Sedgemoor And Athelney	Moor/Heat/Downland	5379	Sedgemoor
Bruton Dovecote	Monument/archaeology	4518	South Somerset
Stoke Sub Hamdon Priory	Historic property	7530	South Somerset
Blackdown Hills (Wellington Monument)	Moor/Heat/Downland	10761	Taunton Deane
Exmoor: moor	Moor/Heat/Downland	276452	West Somerset
Exmoor: woodland	Woodland	260348	West Somerset
Exmoor: farmland	Farmland	32879	West Somerset
The Quantocks	Moor/Heat/Downland	107360	West Somerset
The Quantocks: farmland	Farmland	12749	West Somerset
Wiltshire Gated Properties			
Avebury: Museum	Historic property	43257	Kennet
Avebury Manor	Historic property	18465	Kennet
Dinton: Phillips House	Historic property	17856	Salisbury
Salisbury: Mompesson House	Historic property	32508	Salisbury
Stourhead House And Garden	Historic property	54317	Salisbury
Stourhead Garden	Gardens	190000	Salisbury
Great Chalfield Manor	Historic property	4639	West Wiltshire
Holt: The Courts	Garden	13610	West Wiltshire
Lacock Abbey	Historic property	62173	West Wiltshire
Westwood Manor	Historic property	3374	West Wiltshire
Wiltshire Ungated Properties			
Avebury: Circle	Monument/archaeology	300000	Kennet
Lockeridge Dene	Farmland	184	Kennet

Piggledene	Farmland	184	Kennet
Cherhill Down And Oldbury Castle	Moor/Heath/Downland	7616	North Wiltshire
Lacock Village	Historic property - village	79696	North Wiltshire
Figsbury Ring	Monument/archaeology	13800	Salisbury
Pepperbox Hill	Moor/Heath/Downland	6624	Salisbury
Stonehenge Down	Moor/Heath/Downland	88992	Salisbury
Stourhead Estate	Moor/Farmland	14688	Salisbury
White Barrow (Nr Stonehenge)	Monument/archaeology	5184	Salisbury
Win Green Hill	Moor/Heath/Downland	3168	Salisbury
The Coombes	Moor/Heath/Downland	3432	Swindon
Cley Hill	Moor/Heath/Downland	15900	West Wiltshire

Appendix 1 – Table 6 Visitor numbers at National Trust properties in the South West, county/regional totals.

Avon Gated Properties		382,575
Avon Ungated Properties		670,661
Avon Total		1,053,236
Cornwall Gated Properties		843,097
Cornwall Ungated Properties		3,037,898
Cornwall Total		3,880,940
Devon Gated Properties		970,067
Devon Ungated Properties		1,772,048
Devon Total		2,742,115
Dorset Gated Properties		408,423
Dorset Ungated Properties		1,479,471
Dorset Total		1,887,894
Gloucestershire Gated Properties		307,483
Gloucestershire Ungated Properties		326,416
Gloucestershire Total		633,899
Somerset Gated Properties		358,284
Somerset Ungated Properties		1,041,539
Somerset Total		1,399,823
Wiltshire Gated Properties		440,199
Wiltshire Ungated Properties		539,468
Wiltshire Total		979,667

Wessex Gated Properties	1,589,481
Wessex Ungated Properties	3,731,139
Wessex Total	5,320,620
South West Gated Properties	3,710,128
South West Ungated Properties	8,867,446
South West Total	12,577,574

Appendix 1- Table 7 Visitor Numbers as a % of SW total.			
	Gated	Ungated	All
Avon	10%	8%	8%
Cornwall	23%	34%	31%
Devon	26%	20%	22%
Dorset	11%	17%	15%
Gloucestershire	8%	4%	5%
Somerset	10%	12%	11%
Wiltshire	12%	6%	8%
	100%	100%	100%
Wessex	43%	42%	42%

- 1.17 Visitor numbers to National Trust sites are estimated to total 12.6 million annually. 3.7 million are to properties with gated access while 8.9 million are to ungated sites.
- 1.18 Split within the South West it can be seen that the counties have very different patterns of visits. Cornwall, for instance, has 23% of the South West total of visits to gated properties but 34% of visits to ungated properties while Wiltshire has 12% of visits to gated properties but 6% of visits to ungated sites. The pattern of visits is a function of the portfolio of properties in each county.
- 1.19 From the visitors' perspective the Trust is offering a very different set of services in the different counties, although further work would be necessary to quantify the effects.

Appendix 1 Table 8 – Top 15 most visited sites in the South West.				
Name	Type	Number	Location	Access
Studland (Corfe Castle Estate)	Coastline	1000000	Purbeck	Ungated
Shire Hampton Park	Parkland	494648	Bristol	Ungated
Arlington Court: Estate	Parkland	339284	North Devon	Ungated
Avebury: Circle	Monument/archaeology	300000	Kennet	Ungated
Exmoor: moor	Moor/Heat/Downland	276452	West Somerset	Ungated
Exmoor: woodland	Woodland	260348	West Somerset	Ungated
Saltram: Estate	Parkland	255300	Plymouth	Ungated
Bedruthan (Carnewas & Park Head)	Coastline	225000	Restormel	Ungated
Killerton Garden	Garden	224300	Mid Devon	Gated
St Michael's Mount	Historic property	202585	Penwith	Ungated
Stourhead Garden	Gardens	190000	Salisbury	Gated
Corfe Castle	Historic property	174500	Purbeck	Gated
Lanhydrock	Historic property	166629	North Cornwall	Gated
Bath Assembly Rooms	Historic property	146073	Bath & NES	Gated
Lynmouth: Foreland Point, Countisbury Hill And Watersmeet - Wood	Woodland	139400	North Devon	Ungated

- 1.20 It is estimated that the most visited National Trust property in the South West is Studland with around 1 million visits per year. The most visited gated site is Killerton Garden, with an estimated 224,300 visits annually. At the other end of the scale are Lockeridge Dene and Piggledene with an estimated 184 visits per year (see table 5 in appendix 1).

A.2 Survey of visitors to the South West and to National Trust properties.

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SUMMARY.

1,573 completed interviews were undertaken between April and October 1998, at 15 National Trust sites, both gated and ungated, throughout the National Trust's Cornwall, Devon, Wessex and Severn regions. A further study of 428 staying visitors leaving the region was employed in order to provide a cross-section of the general visitor to the South West from which to base comparisons. These were undertaken at three service stations along the main exit route out of the South West, referred to in the report as the 'exit survey'. The following results were drawn:

- Out of the 2001 respondents, 77% were on holiday and 23% were on a day trip from home. The average length of stay for the holiday-makers was 7.24 nights. However visitors to the Lizard peninsula were more likely to be staying between 7 and 14 nights. Sightseeing in the countryside was a prominent activity for the majority of respondents (71%). Coastal walks attracted over half of all respondents, but appealed less to those interviewed at gated National Trust sites and National Trust members.
- On a scale of 1 to 10 where 10 was the 'main reason' and 1 was 'not important at all' respondents were asked to measure how important the rural landscape was in motivating their trip from home. It was unanimous amongst all categories of visitor that the quality of the rural landscape was an important motivating factor. Overall scores averaged between 8.3 and 8.8. However, the visitors for the exit survey averaged a score of 7.8, indicating that National Trust visitors and particularly those visiting the Lizard and other ungated sites, place a slightly higher value on the rural landscape. Nonetheless the 7.8 exit survey score remains high.
- Aspects of the rural environment important to the visitor, such as peace and tranquillity, unspoilt, uncommercialised and beautiful natural scenery, are universally important satisfaction indicators. Differences (albeit minor) are that the general holiday maker is slightly more inclined to seek good places to eat and drink; quality towns and villages and good beaches, and is slightly less concerned with peacefulness or uncommercialised and unspoilt scenery. Conversely National Trust visitors, and particularly those on the Lizard, are particularly interested in beautiful natural scenery and a clean and unspoilt environment.
- There was a strong intention to visit National Trust sites. The exit survey showed that nearly half of the general visitor to the South West had visited National Trust property. For National Trust members and visitors to National Trust sites, there was an awareness of and intention to visit further sites.
- There is an overall tendency to identify particular National Trust sites of interest in the planning stages of a holiday. Visitors at ungated sites and those on the Lizard peninsula showed a higher propensity to pre-plan visits to National Trust sites than did other visitors. Over 80% of respondents placed a high value on visiting National Trust sites, the experience being highly important to their overall trip satisfaction.

- When respondents were asked to describe what spontaneously comes to mind when they thought of the National Trust, many positive perceptions were revealed of well cared for historic and natural places. Some negative images emerged however, and these included: “too formal and staid”; “not children or dog friendly”; “too many shops”; “middle-aged, upper-class”; and the “foxhunting debate”.
- Overall, the National Trust is seen to play a highly significant role in the preservation of England’s heritage, particularly with respect to the nation’s historic buildings and coastline. Rural life, farmland and villages are seen to be less dependent on the National Trust, whereas maintenance of the countryside and nature conservation is perceived as being highly influenced by the Trust’s actions.
- In keeping with the positive image associated with the National Trust, it was unanimously felt that the effect on the nation’s heritage and countryside would be detrimental should the Trust no longer exist. A high value is placed on the Trust by everyone, with an expected increased value for NT members.
- Out of the 2001 completed interviews, 41.7% were members of the National Trust. Data from the exit survey, however, showed that 21.3% of the general visitor belonged to the National Trust.
- The majority of groups on National Trust sites did not include children between the ages of 12 to 16 or young adults between the ages of 17 to 21, and 22 to 25. Between the ages of 26 and 35, there appears a small proportion of groups with young families with children aged between 0 and 11. Visitors to the Lizard peninsula however are more likely to be accompanied by children. On an individual rather than group basis, it can be seen that nearly half of visitors to the Trust’s properties fall within the ages of 46 to 60 and over.
- Half the visitors comprise couples, 13.3% arrive in groups of three and 17.4% as groups of four. Day trippers are more likely than others to be as a couple. Overall, the average group size consisted of three people (3.01). For holidaymakers at gated sites, the average group size was 2.90; for holidaymakers at ungated sites, it was 3.09; for day trippers at gated sites, it was 2.59; and for day trippers at ungated sites, the average group size was 3.00. For the general visitor, i.e. the exit survey, the average group size was 3.2.
- Visitors to the National Trust are more likely to have a professional or managerial occupation. Social classes A & B were represented more at gated sites and are also more likely to be members. In comparison occupations from social class C1, C2 are under-represented except in the case of day trippers.
- Overall, 35.8% were new visitors, 20.7% had visited within the last five years; a quarter visit regularly once a year, and a further 3.1% visit once a month. There appears to be little differentiation between repeat visits and gated/ungated sites. Day trippers, however, do display different behaviour; in that 23.4% were first time visitors and they were more likely to visit NT sites once per year or at least once per month.

- Some locations particularly stand out as mostly attracting holidaymakers as opposed to day trippers. Mullion; Rushy Green/Crantoek; Lanhydrock; Kynance and Lizard Point have an extremely high percentage of holidaymakers. Conversely, nearly half of the visitors at Montacute, Stourhead, Lacock and Hidcote were day trippers.
- Visitors to Montacute, Killerton, Lanhydrock and Hidcote were more likely to be members of the National Trust than visitors at other locations. Conversely, visitors to Glastonbury Tor, Lizard Point, Mullion, Rushy Green/Crantoek, Fingle Bridge, Kynance, Bibury and Golden Cap showed the least number of visitors who were NT members.
- Whereas couples are the most frequent group composition for all locations, certain sites attract larger groups; namely: Rushy Green / Crantoek (groups of 4); Corfe; Lacock; Fingle Bridge; Kynance and Mullion (on average groups of three to four people).
- Cornwall's National Trust visitors are predominantly holidaymakers (91.1%). Devon and Wessex show equal proportions of holiday makers to day trippers with the Severn region displaying the highest number of day trippers.
- When comparing all regions, the percentage of children aged between 0 and 16 is constant over Cornwall, Devon and Wessex's sites. Visitors to the Severn's National Trust attractions are less likely, however, to be accompanied by children and are more likely to be aged between 46 to 60.
- Visitors to Cornwall's NT sites are less likely to have a professional or managerial occupation. Conversely the visitor to the sites in the Severn region are more likely to be of social class A or B.

1 Introduction.

1.1 Rationale.

- 1.1.1 The overall study and the economic model was greatly strengthened and enhanced by the inclusion of primary survey work. For this, data collection was in the form of two surveys. Firstly, an attitude survey of staying visitors leaving the region to determine the extent that landscape motivated the trip, both prior to the visit and usage during the visit, and secondly a similar attitude survey of visitors to National Trust sites. In this way the proportion of all trips which are due to the landscape is identified for both types of visitor. This data is then used to strengthen the overall model determining the regional tourism value of landscape by providing actual importance of landscape rather than using extant data generated for other purposes.
- 1.1.2 The survey work is primarily designed to provide the necessary inputs for the modelling part of the study. However it also provides information of general interest to the National Trust.

1.2 Methodology

- 1.2.1 In broad terms the study isolates the proportion of discretionary leisure trips to the South West which are motivated by conserved landscape. The study recognises that landscape will commonly be one of a plethora of motivations and sets out to apply proportions of visits rather than assuming a dichotomy.
- 1.2.2 The entire survey was relatively large in order to generate responses for a cross-section of the Trust's properties, and in addition, to provide a cross-section of the general visitor to the South West from which to form a control group. It was decided therefore to undertake a total of 2001 interviews to include each of the 19 National Trust locations, both gated and ungated, including the Lizard Peninsula, as well as at various service stations to embody the general visitor leaving the South West. National Trust locations were chosen to ensure that sufficient Trust visitors were interviewed.
- 1.2.3 The interviews collected at service stations from visitors leaving the region, i.e. the control group, are referred to as the 'exit survey' in this report.
- 1.2.4 The Lizard peninsula was identified as an area of particular interest by the National Trust and additional resources were deployed to collect and analyse more information for this area.
- 1.2.5 The process of attributing motivations is based upon a survey of visitors returning home. Following a review of indirect techniques it was decided to use direct questions about motivations and actions.

- 1.2.6 Interviewing was undertaken entirely by Tourism Associates staff. Visitors to the chosen National Trust sites were selected at random between April and October 1998. For the purposes of data analysis, distinctions have been drawn between those people interviewed on gated sites (627 cases); and ungated sites (946 cases); on The Lizard Peninsula (365 cases), National Trust members (813 cases), and as a control factor, those general visitors who were leaving the South West (the Exit Survey) (428 cases). In addition to this, comparisons between holiday makers (1541 cases) and day trippers (460 cases) are highlighted.
- 1.2.7 For a further analysis on site locations and National Trust regions, please refer to sections 2.19 and 2.20 respectively.
- 1.2.8 The number of interviews undertaken at each location are summarised in Table 1.2.8.

Table 1.2.8: No. of Interviews per Location	
National Trust Locations	Number
Mullion	125
Montacute	104
Glastonbury Tor	99
Killerton	104
Corfe	100
Golden Cap	98
Stourhead	109
Lacock	104
Minchinhampton Common	8*
Rushy Green/Crantock	75
Carnewas	20*
Loe Bar	9*
Hollywell	9 *
Bibury	80
Hidcote	108
Fingle Bridge	88
Lanhydrock	102
Kynance	125
The Lizard Point	106
Michaelwood Services	164
Andover/Fleet/Little Chef	80
Sedgemoor Services	184
Total	2001

- 1.2.9 *The number of completed interviews at Minchinhampton Common was low due to the site being mostly frequented by local visitors as opposed to day or holiday trippers. Similarly data collection at Loe Bar was halted due to the nature and extent of the site, and the relatively low visitor throughput. The low number collected at Hollywell and Crantock were intended only to increase and enrich the number of Rushy Green and Crantock completions with the added view to encapsulating a different type of visitor.
- 1.2.10 Although every effort has been made to ascertain the validity of the findings presented in this report, Tourism Associates cannot accept liability for the accuracy of this information or the interpretations placed on it. It should also be noted that while the results are the copyright of the client, Tourism Associates retains copyright of the questionnaire and report formats in partnership with the National Trust.

2 Results.

2.1 Trip Characteristics .

2.1.1 Type of Trip.

- 2.1.1.1 Out of the 2001 completed interviews for all sites and locations, 77% were on holiday and 23% were on a day trip from home. Out of those visitors who were on holiday 12% were touring the area. See Table 2.1.1 for a breakdown of type of trip by location. The figures pertaining to touring are a subset of the holiday trips.

Table 2.1.1: Type of Trip.						
Trip type %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard
Holiday	77.0	95.8	61.9	78.5	71.0	91.8
Day Trip	23.0	4.2	38.1	21.4	29.0	7.9
Touring	12.0	11.4	10.7	13.2	10.2	11.8

2.1.2 Length of Stay.

- 2.1.2.1 Out of all the staying visitors, irrespective of location, the average length of stay was 7.24 nights and the most commonly mentioned number of nights was 7. Length of stay by location and membership is detailed below in Table 2.1.2. The Lizard stands out as attracting longer staying visitors, i.e. they are more likely to be staying 7 or 14 nights than visitors to other locations.

Nights Away %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard
1 – 6	41.8	44.2	42.4	40.1	42.5	27.8
7	33.7	40.5	31.8	30.7	32.2	38.7
8 – 13	11.1	8.1	14.3	11.0	11.3	12.6
14	10.2	5.9	9.6	13.1	10.1	15.9
Over 15	3.2	1.3	1.9	5.1	3.9	5.0
Total	100	100	100	100	100	100

2.2 Main Activities.

- 2.2.1 The main activities undertaken by each category of visitors is detailed in Table 2.2.1. Sightseeing in the countryside was a prominent activity for the majority of respondents. Visiting towns and cities was undertaken by 78.2% of general visitors and 75.3% of holiday makers; whilst the National Trust gated visitors were less inclined to seek towns and cities, as were the day trippers.
- 2.2.2 Coastal walks attracted over half of all respondents, but appealed less to those interviewed at gated NT sites and NT members, whilst moorland walks appealed to less than a quarter of all respondents.
- 2.2.3 Visiting historic houses attracted 51.2% of all respondents, whilst just under a third (29.3%) of the general holiday visitor. National Trust members particularly sought this activity (72.2%).

%	Visit cities & towns	Explore Country Villages	Going to the Beach	Walking on the coast
All Visitors	61.5	56.3	49.5	51.0
Exit Survey	78.2	56.2	63.7	61.6
NT Gated	46.9	44.8	30.0	32.9
NT Ungated	63.5	64.0	55.8	58.2
The Lizard	68.8	66.8	76.7	87.1
Members	52.5	52.5	37.9	41.3
Holiday Makers	75.3	65.6	60.9	62.9
Day Trippers	14.8	25.1	10.7	10.9

%	Take part in sports	Walk on the moors	Sightseeing in the countryside	Walk in the countryside
All Visitors	2.6	16.4	71.8	49.2
Exit Survey	4.4	15.7	68.9	38.9
NT Gated	1.3	13.7	62.2	41.9
NT Ungated	2.5	18.4	79.5	58.6
The Lizard	5.5	23.3	83.8	56.2
Members	1.8	15.6	67.3	45.1
Holiday Makers	3.3	20.8	79.7	56.2
Day Trippers	0.0	1.5	45.1	25.3

%	Visit historic houses	Visit museums and galleries	Shopping for non-essentials	None of these
All Visitors	51.2	28.0	49.6	1.1
Exit Survey	29.3	21.3	67.0	2.3
NT Gated	80.1	26.8	37.6	1.3
NT Ungated	41.9	31.8	49.6	0.4
The Lizard	39.2	34.0	53.2	0.3
Members	72.7	29.9	41.8	.9
Holiday Makers	53.2	34.6	58.1	0.6
Day Trippers	44.0	5.7	20.7	2.6

2.3 The Importance of Rural Landscape as a Motivating Factor.

- 2.3.1 For this question respondents were asked how important rural landscape was in motivating their trip from home. Rural landscape was described as being fields, woods, moorland, villages and coastline. Answers were given on a scale of between 1 and 10 where 10 was the 'main reason' and 1 was 'not important at all'. Table 2.3.1 indicates, for each category of visitors, the average response (the mean) and the most frequent response (the mode), and Table 2.3.2 details the actual scores.
- 2.3.2 It was unanimous amongst all categories that the quality of the rural environment was an important factor in motivating their trip to the South West. This emphasises the need for all concerned to preserve this major asset in order that visitors continue to come and enjoy the remarkable scenery.
- 2.3.3 All visitor types placed a high value on the landscape and its role in motivating visits. The highest scores were amongst visitors to the Lizard and to Trust ungated sites generally. For the general visitor, i.e. the exit survey, the average score is 7.8, slightly under average and possibly implying that

National Trust visitors place a significantly higher importance on landscape than do other visitors.

%	Average score	The most frequent score
All Visitors	8.3	10
Exit Survey	7.8	10
NT Gated	7.8	10
NT Ungated	8.7	10
The Lizard	8.8	10
Members	8.2	10
Holiday Makers	8.2	10
Day Trippers	8.4	10

Score	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
1	3.5	9.7	4.8	2.1	4.7	0.8	3.2	4.6
2	1.1	2.6	0.8	0.6	0.7	0.3	1.0	1.3
3	1.1	0.9	1.4	1.0	1.2	0.5	0.8	2.2
4	1.0	1.4	0.8	1.1	1.1	1.4	1.0	1.1
5	5.2	7.9	6.4	3.2	5.3	3.6	4.9	6.3
6	3.3	4.4	3.7	2.6	3.9	1.9	3.5	2.8
7	7.1	9.3	9.6	4.5	7.7	4.7	7.6	5.7
8	23.8	25.0	25.0	22.5	23.9	22.5	25.2	19.2
9	14.5	12.1	13.2	16.5	14.8	17.5	15.3	11.8
10	39.1	31.5	34.3	45.8	36.5	46.8	37.4	44.9

2.4 Aspects of the Rural Environment which are important to the Visitor.

2.4.1 For this question, respondents were asked to state the importance of various aspects of the landscape, in making their holiday or day trip enjoyable, on a scale of 1 to 10; where 10 was important, and 1 was not important. Table 2.4.1 below details the average scores which were given for each category of visitor. The figures in brackets indicate the most frequent response.

2.4.2 As can be seen from these results, peace and tranquillity, unspoilt, uncommercialised and beautiful natural scenery are universally important satisfaction indicators. The average scores for holidaymakers indicate their preference for good places to eat and drink; well-kept towns and villages; good beaches, and interesting places to visit. They are less concerned with

peacefulness or an unspoilt and uncommercialised environment; as one might expect they are more inclined to seek facilities.

2.4.3 Conversely visitors to the Lizard are particularly interested in beautiful natural scenery and clean, unspoilt areas.

2.4.4 In general, however, quality towns and villages, countryside, cleanliness and lack of pollution were sought after by everyone. Friendly and welcoming local people also figured highly, except for day trippers who spend less time in the area and who are less affected by local behaviour. Good places to eat and drink are again mostly favoured by everyone except day trippers.

%	Peace & tranquillity	Unspoilt / un-commercialised	Beautiful natural scenery	Interesting places to visit
All Visitors	8.2 (10)	8.4 (10)	8.8 (10)	7.2 (8)
Exit Survey	7.7 (10)	7.7 (10)	8.3 (10)	7.3 (8)
NT Gated	8.2 (10)	8.4 (10)	8.8 (10)	7.1 (10)
NT Ungated	8.5 (10)	8.7 (10)	9.0 (10)	7.2 (10)
The Lizard	8.5 (10)	8.9 (10)	9.1 (10)	7.4 (8)
Members	8.4 (10)	8.5 (10)	8.8 (10)	7.1 (10)
Holiday Makers	8.2 (10)	8.3 (10)	8.8 (10)	7.7 (8)
Day Trippers	8.4 (10)	8.8 (10)	8.9 (10)	5.5 (1)

	Good places to eat and drink	Good beaches	Friendly local people	Quality of towns and villages
All Visitors	6.5 (8)	4.8 (1)	6.8 (8)	7.1 (8)
Exit Survey	7.1 (10)	6.0 (10)	7.3 (8)	7.5 (8)
NT Gated	6.2 (8)	3.2 (1)	6.3 (8)	6.5 (8)
NT Ungated	6.4 (8)	5.3 (1)	6.9 (8)	7.3 (8)
The Lizard	6.6 (8)	7.0 (10)	7.3 (8)	7.3 (8)
Members	6.4 (8)	3.8 (1)	6.5 (8)	6.8 (8)
Holiday Makers	6.8 (8)	5.6 (1)	7.1 (8)	7.4 (8)
Day Trippers	5.4 (1)	2.2 (1)	5.6 (1)	6.0 (8)

	Quality of the countryside	Cleanliness / lack of pollution
All Visitors	8.4 (10)	8.7 (10)
Exit Survey	8.2 (10)	8.6 (10)
NT Gated	8.3 (10)	8.6 (10)
NT Ungated	8.6 (10)	8.9 (10)
The Lizard	8.7 (10)	9.0 (10)
Members	8.3 (10)	8.7 (10)
Holiday Makers	8.4 (10)	8.7 (10)
Day Trippers	8.4 (10)	8.8 (10)

2.5 Intention to Visit NT sites.

2.5.1 Table 2.5.1 details respondents' intention to visit National Trust sites. For NT members and visitors to National Trust sites, there was an awareness of and intention to visit further sites. The exit survey showed that nearly half of general visitors to the South West had visited NT property.

	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Yes	79.9	44.3	98.4	83.7	93.6	90.1	78.3	85.2
No	16.1	48.9	1.1	11.2	5.7	5.2	16.8	13.7
Unsure	3.5	6.3	0.5	4.3	0.7	3.6	4.4	0.9
Do not know about NT	0.5	0.5		0.8		1.1	0.5	0.2
Total	100	100	100	100	100	100	100	100

2.6 The Proportion and Importance of Pre-Planned Visits to NT sites for all categories of visitors.

2.6.1 This question was designed to ascertain the importance of the National Trust in terms of motivating visits to the West Country and in providing an element of additionality. Respondents were asked to identify the National Trust sites they intended to visit, whether they had pre-planned the visit before they left home, and how important was the visit to their overall day trip out or holiday.

2.6.2 Table 2.6.1 outlines the percentage of people, for each category of visitor, who pre-planned a visit to an identified National Trust site. As can be seen there is an overall tendency to identify particular sites of interest in the planning stages of a holiday. Visitors at ungated sites and those on the

Lizard peninsula showed a higher propensity to pre-plan visits to NT sites.

- 2.6.3 Table 2.6.2. provides the average scores for the importance of the pre-planned visit to the overall satisfaction and motivation of their overall trip, where 10 is very important and 1 is not important at all. The results indicate that respondents placed a high value on visiting National Trust sites, with the most frequent response for four out of the six sites being 10 and therefore very important to their overall trip. Once again, the most frequent scores are indicated in the brackets.
- 2.6.4 Respondents were asked to identify 5 NT locations; the first being where they were that day. These were individually verified as belonging to the National Trust and input into the computer software. Of course each respondent identified their own particular sites of interest; which is why they are not individually named in the table.
- 2.6.5 Those who were interviewed at the service stations (exit survey) would not have replied to the first location as this would be the service station rather than an NT site.

Pre-planned NT visits	Over all	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
1st site	69.9	N/A	71.3	68.7	71.2	69.1	61.0	92.4
2nd site	65.9	59.4	66.1	68.3	67.6	70.5	64.1	93.9
3rd site	63.7	59.5	60.6	66.8	64.8	65.7	63.3	72.7
4th site	69.0	60.0	66.1	73.6	66.9	73.5	68.8	*
5th site	64.4	58.3	52.0	75.0	63.0	91.3	64.4	*
6th site	73.5	80.0	66.7	75.0	66.7	78.6	73.5	*
Average	67.7	63.4	63.8	71.2	66.7	74.8	65.9	*

* Day trips tend to be not planned very far in advance; therefore data is unreliable for this sector.

Table 2.6.2: Average Importance of Each Planned visit.								
(i.e. on a scale of 1 to 10 where 10 = very important).								
Pre-planned NT visits	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
1st site	8.2 (10)	-	8.3 (10)	8.2 (10)	8.4 (10)	8.3 (10)	7.9 (10)	9.2 (10)
2nd site	8.0 (10)	7.8 (10)	7.8 (8)	8.3 (10)	8.0 (10)	8.5 (10)	8.0 (10)	8.8 (10)
3rd site	8.1 (8)	8.1 (8)	7.7 (8)	8.3 (10)	8.0 (8)	8.3 (10)	8.1 (8)	9.0 (10)
4th site	8.2 (8)	7.9 (8)	8.1 (8)	8.4 (8)	8.2 (8)	8.4 (8)	8.2 (8)	N/A
5th site	8.5 (10)	8.3 (10)	8.2 (8)	8.8 (10)	8.4 (10)	9.0 (10)	8.5 (10)	N/A
6th site	8.7 (10)	8.8 (10)	8.3 (8)	8.8 (10)	8.4 (10)	9.1 (10)	8.7 (10)	N/A
Overall Average	8.3 (9.3)	8.2 (9.2)	8.1 (8.3)	8.5 (9.7)	8.2 (9.3)	8.6 (9.7)	8.2 (9.3)	9.0 (10)

2.6.6 The perceived importance of pre-planned visits to National Trust sites to the overall satisfaction of their trip is particularly noticeable for day trippers. However visitors to the Lizard also place a great deal of importance to their National Trust visits as did visitors at ungated sites. The overall score is 8.3.

2.7 Perceptions of the National Trust

2.7.1 Respondents were asked to describe what spontaneously comes to mind when they thought of the National Trust. Many interesting thoughts were revealed; the most common of which are outlined in the following tables; categorised by type and location of visitor.

2.7.2 For the most part, comments revealed positive perceptions of well cared for historic and natural places. Some negative images emerged, all by less than 3% of respondents, and these were: 'too formal and staid'; 'not children / dog friendly'; 'too many shops'; 'upper class'; 'middle-aged people'; 'political power – foxhunting debate'; 'greedy organisation' 'difficulties for the disabled'; 'limited opening times'; 'similarities between properties'; 'unhelpful staff'; and over-used and worn footpaths. Nevertheless, negative comments were generally in the minority.

Table 2.7.1: Spontaneous Images of the National Trust.	
FOR ALL VISITORS	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	13.0
<i>Well maintained historic houses and castles</i>	20.2
<i>Heritage and educational history</i>	4.7
<i>Old buildings and beautiful architecture</i>	3.6
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	3.8
<i>Preservation & Conservation, protected wildlife</i>	9.8
<i>Rural countryside and picturesque views, moors and moorland</i>	11.5
<i>Nice walks and footpaths, nature trails</i>	3.3
<i>Coastline and beaches</i>	3.6
<i>Pleasant things, interesting places</i>	7.0
<i>Oak leaf and acorn symbol</i>	3.9
<i>Shops and facilities</i>	4.2
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	11.4

Table 2.7.2: Spontaneous Images of the National Trust.	
EXIT SURVEY	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	14.5
<i>Well maintained historic houses and castles</i>	20.3
<i>Heritage and educational history</i>	3.9
<i>Old buildings and beautiful architecture</i>	3.6
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	3.4
<i>Preservation & Conservation, protected wildlife</i>	9.7
<i>Rural countryside and picturesque views, moors and moorland</i>	14.4
<i>Nice walks and footpaths, nature trails</i>	4.9
<i>Coastline and beaches</i>	3.1
<i>Oak leaf and acorn symbol</i>	3.2
<i>Shops & facilities</i>	4.0
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	15.0

Table 2.7.3: Spontaneous Images of the National Trust.	
FOR VISITORS ON GATED SITES	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	16.3
<i>Well maintained historic houses and castles</i>	22.0
<i>Heritage and educational history</i>	4.7
<i>Old buildings and beautiful architecture</i>	3.4
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	3.0
<i>Preservation & Conservation, protected wildlife</i>	8.4
<i>Rural countryside and picturesque views, moors and moorland</i>	9.6
<i>Coastline and beaches</i>	2.8
<i>Oak leaf and acorn symbol</i>	3.7
<i>Shops and facilities</i>	6.3
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	18.8

Table 2.7.4: Spontaneous Images of the National Trust.	
FOR VISITORS ON UNGATED SITES	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	16.5
<i>Well maintained historic houses and castles</i>	18.8
<i>Heritage and educational history</i>	4.4
<i>Old buildings and beautiful architecture</i>	3.8
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	3.3
<i>Preservation & Conservation, protected wildlife</i>	8.5
<i>Rural countryside and picturesque views, moors and moorland</i>	11.3
<i>Nice walks and footpaths, nature trails</i>	3.7
<i>Coastline and beaches</i>	4.4
<i>Oak leaf and acorn symbol</i>	4.4
<i>Shops and facilities</i>	3.6
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	17.3

Table 2.7.5: Spontaneous Images of the National Trust. FOR VISITORS ON THE LIZARD	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	9.6
<i>Well maintained historic houses and castles</i>	17.8
<i>Heritage and educational history</i>	3.3
<i>Old buildings and beautiful architecture</i>	2.7
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	4.1
<i>Preservation & Conservation, protected wildlife</i>	14.4
<i>Rural countryside and picturesque views, moors and moorland</i>	11.1
<i>Nice walks and footpaths, nature trails</i>	8.0
<i>Coastline and beaches</i>	5.2
<i>Oak leaf and acorn symbol</i>	4.5
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	19.3

Table 2.7.6: Spontaneous Images of the National Trust. NATIONAL TRUST MEMBERS	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	14.2
<i>Well maintained historic houses and castles</i>	21.2
<i>Heritage and educational history</i>	5.0
<i>Old buildings and beautiful architecture</i>	3.2
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	2.4
<i>Preservation & Conservation, protected wildlife</i>	11.0
<i>Rural countryside and picturesque views, moors and moorland</i>	9.4
<i>Nice walks and footpaths, nature trails</i>	3.0
<i>Coastline and beaches</i>	4.2
<i>Oak leaf and acorn symbol</i>	4.2
<i>Shops & facilities</i>	5.6
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	16.6

Table 2.7.7: Spontaneous Images of the National Trust. FOR HOLIDAY MAKERS	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	12.4
<i>Well maintained historic houses and castles</i>	20.2
<i>Heritage and educational history</i>	4.1
<i>Old buildings and beautiful architecture</i>	3.3
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	3.5
<i>Preservation & Conservation, protected wildlife</i>	12.1
<i>Rural countryside and picturesque views, moors and moorland</i>	12.0
<i>Nice walks and footpaths, nature trails</i>	5.1
<i>Coastline and beaches</i>	3.7
<i>Oak leaf and acorn symbol</i>	3.7
<i>Shops and facilities</i>	4.4
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	15.5

Table 2.7.8: Spontaneous Images of the National Trust. FOR DAY TRIPPERS	
	Percentage
<i>Gardens, grounds, woodlands, trees and parkland</i>	15.2
<i>Well maintained historic houses and castles</i>	19.9
<i>Heritage and educational history</i>	5.6
<i>Old buildings and beautiful architecture</i>	4.5
<i>Unspoilt, uncommercialised, peace, quiet and relaxation</i>	3.2
<i>Preservation & Conservation, protected wildlife</i>	9.7
<i>Rural countryside and picturesque views, moors and moorland</i>	10.1
<i>Nice walks and footpaths, nature trails</i>	4.3
<i>Coastline and beaches</i>	3.3
<i>Oak leaf and acorn symbol</i>	4.3
<i>Shops</i>	3.6
<i>Other perceptions (occurring in less than 3.0% of cases)</i>	16.3

2.8 The Role of the NT in Conserving England's Heritage.

- 2.8.1 In order to discover how the public view the importance of the National Trust with regards to the care and preservation of historic buildings; coastline; rural life; farmland; villages; nature conservation and general countryside (moor and woodland), respondents were asked to grade the importance of their role on a scale of 1 to 10; where 10 is very important and 1 is not important at all.
- 2.8.2 Table 2.8.1 depicts the average scores which were given for each category of visitor. The figures in brackets indicate the most frequent response (the mode).

Table 2.8.1: The Role of the NT in Conserving England's Heritage.								
	All	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Historic buildings	9.1 (10)	9.0 (10)	9.2 (10)	9.1 (10)	9.3 (10)	9.0 (10)	9.1 (10)	9.3 (10)
Coastline	8.6 (10)	8.5 (10)	8.7 (10)	8.7 (10)	8.8 (10)	8.9 (10)	8.6 (10)	8.8 (10)
Rural Life	7.3 (10)	7.4 (10)	7.3 (10)	7.4 (8)	7.3 (10)	7.6 (8)	7.3 (10)	7.3 (10)
Farmland	7.2 (10)	7.2 (8)	7.5 (10)	6.9 (10)	7.5 (10)	7.1 (10)	7.1 (10)	7.3 (10)
Villages	7.5 (10)	7.4 (10)	7.7 (10)	7.4 (8)	7.6 (10)	7.5 (8)	7.5 (10)	7.5 (10)
Nature conservation	8.5 (10)	8.7 (10)	8.3 (10)	8.5 (10)	8.4 (10)	8.8 (10)	8.5 (10)	8.3 (10)
Other countryside	8.3 (10)	8.3 (10)	8.3 (10)	8.4 (10)	8.4 (10)	8.5 (10)	8.3 (10)	8.4 (10)

2.8.3 Overall, the National Trust is seen to play a highly significant role in the preservation of England's heritage, particularly with respect to the nation's historic buildings and coastline. Rural life, farmland and villages are seen to be less dependent on the National Trust, whereas maintenance of the countryside and nature conservation is perceived as being highly influenced by the Trust's actions.

2.9 The Impact on the Countryside if the National Trust No Longer Existed.

2.9.1 Respondents were asked to consider the impact on the countryside if the National Trust was to be disbanded tomorrow. Table 2.9.1 details in percentages the number of people for each category.

Table 2.9.1: The Impact on the Countryside if the National Trust No Longer Existed.

	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Very beneficial	0.2	0.0	0.2	0.3	0.1	0.5	0.1	0.4
Fairly beneficial	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
None	0.7	0.7	1.0	0.4	0.5	0.3	0.6	0.9
Unsure	4.6	4.9	2.6	5.9	1.6	6.0	5.1	3.1
Fairly Harmful	27.1	26.2	28.3	26.8	24.7	24.4	27.0	27.7
Very harmful	67.4	68.2	68.1	66.6	73.1	68.8	67.2	67.9
Total	100	100	100	100	100	100	100	100

2.9.2 In keeping with the positive image associated with the National Trust, it was unanimously felt that the effect on the nation's heritage and countryside would be detrimental should the Trust no longer exist. A high value is placed on the Trust by everyone, with an expected increased value for NT members.

2.10 Membership of the National Trust.

Table 2.10.1: National Trust Membership

%	Overall	Exit Survey	NT Gated	NT Ungated	The Lizard	Holiday Makers	Day Trippers
Yes	41.7	21.3	26.2	29.0	24.8	38.5	52.6
No	58.2	78.7	73.8	70.7	75.2	61.3	47.4
Unsure	0.2			0.3		0.2	
Total	100	100	100	100	100	100	100

2.10.1 Out of the 2001 completed interviews, 41.7% were members. However, the data from the exit survey suggests that 21.3% of all visitors are members of the National Trust. As the other interviews took place on National Trust properties, it follows that the overall percentage of NT members (41.7) is over and above that for the exit survey.

2.11 Group Characteristics by Age.

2.11.1 The age categories are as per those used in the census data collection. This method allows further analysis and benchmarking on age characteristics of the region's visitors should this be required at a later date.

2.11.2 Tables 2.11.1a-i detail group characteristics by age. As may be expected, the majority of groups did not include children between the ages of 12 to 16

or young adults between the ages of 17 to 21, and 22 to 25. Between the ages of 26 and 35, there appears a small proportion of groups with young families with children aged between 0 and 11. Visitors to the Lizard peninsula however are more likely to be accompanied by children.

2.11.3 For comparison with the British population as a whole, the census details regarding age can be broken down as follows: age 0 – 4, 6.62%; age 5 – 9, 6.26%; age 10 – 15, 7.19%; age 16 – 19, 5.25%; age 20- 24, 7.47%; age 25 – 29, 7.94%; age 30 - 34, 7.28%; age 35 – 39, 6.64%; age 40 – 44, 7.32%; age 45 – 49, 6.14%; age 50 – 54, 5.46%; age 55 – 59, 5.17%; age 60 – 64, 5.14%; age 65 – 69, 4.99%, and age 70 and over, 11.05%.

Table 2.11.1a: Group Characteristics by Age.

AGE 0 TO 5

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	85.6	79.4	89.6	85.7	88.7	83.4	83.9	91.2
1	10.4	14.5	7.3	10.5	8.4	12.6	11.5	6.6
2	3.4	4.7	2.7	3.2	2.3	3.4	3.9	1.5
3+	0.6	1.4	0.4	0.6	0.6	0.6	0.7	0.7
Total	100	100	100	100	100	100	100	100

Table 2.11.1b: Group Characteristics by Age.

AGE 6 to 11

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	84.6	80.4	88.0	85.7	88.3	82.2	83.0	89.8
1	9.7	14.5	7.7	10.5	7.9	9.5	10.8	6.2
2	4.4	4.2	3.5	3.2	3.2	7.4	5.0	2.7
3+	1.3	0.9	0.8	0.6	0.6	0.9	1.2	1.3
Total	100	100	100	100	100	100	100	100

Table 2.11.1c: Group Characteristics by Age.

AGE 12 to 16

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	90.9	88.8	94.3	89.6	93.4	90.2	89.8	94.7
1	6.5	7.2	4.0	8.0	4.6	7.1	7.4	3.5
2	2.1	3.3	1.7	1.9	1.5	2.5	2.3	1.5
3+	0.5	0.7		0.5	0.5	0.2	0.5	0.3
Total	100	100	100	100	100	100	100	100

Table 2.11.1d: Group Characteristics by Age.**AGE 17 to 21**

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	95.0	95.1	98.2	92.7	97.4	93.8	94.8	95.8
1	3.8	3.3	1.6	5.6	1.6	4.9	4.0	3.1
2	0.6	0.7	0.2	0.9	0.4	0.6	0.5	0.9
3+	0.6	0.9		0.8	0.6	0.7	0.7	0.2
Total	100	100	100	100	100	100	100	100

Table 2.11.1e Group Characteristics by Age.**AGE 22 to 25**

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	93.1	92.5	96.8	90.8	97.0	92.6	92.7	94.5
1	4.3	4.0	2.1	6.1	2.2	4.6	4.5	3.8
2	2.1	3.0	1.1	2.3	0.4	1.9	2.2	1.7
3+	0.5	0.5		0.8	0.4	0.9	0.6	
Total	100	100	100	100	100	100	100	100

Table 2.11.1f: Group Characteristics by Age.**AGE 26 to 35**

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	76.4	72.9	82.3	73.9	84.6	73.8	75.8	78.1
1	11.4	12.6	8.8	12.6	8.5	10.2	10.8	13.3
2	10.9	12.4	8.3	11.9	5.7	14.2	11.7	8.2
3+	1.3	2.1	0.6	1.6	1.2	1.8	1.7	0.4
Total	100	100	100	100	100	100	100	100

Table 2.11.1g: Group Characteristics by Age.**AGE 36 to 45**

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	71.0	73.1	72.4	69.0	73.9	68.2	69.6	75.9
1	14.7	15.4	13.6	15.2	13.3	14.5	14.4	15.9
2	12.6	10.0	12.4	13.8	11.2	15.1	14.0	7.5
3+	1.7	1.5	1.6	2.0	1.6	2.2	2.0	0.7
Total	100	100	100	100	100	100	100	100

Table 2.11.1h: Group Characteristics by Age.**AGE 46 to 60**

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	61.2	58.4	60.6	62.9	61.7	60.3	60.7	62.8
1	14.2	15.2	15.3	13.1	14.3	12.0	13.6	16.4
2	21.1	23.1	20.6	20.6	20.2	24.9	21.8	18.8
3+	3.5	3.3	3.6	3.4	3.8	2.8	3.9	2.0
Total	100	100	100	100	100	100	100	100

Table 2.11.1i: Group Characteristics by Age.**AGE 60 and over**

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0	62.8	62.1	55.0	68.4	50.6	71.6	65.8	52.4
1	10.7	11.7	11.2	9.9	11.7	9.3	10.2	12.4
2	22.6	23.1	29.0	17.9	32.0	16.4	20.5	29.6
3+	2.9	3.1	4.8	3.8	5.7	2.7	3.5	5.6
Total	100	100	100	100	100	100	100	100

2.12 Visitor's Ages.

2.12.1 On an individual rather than group basis, it can be seen that nearly half of visitors to the Trust's properties fall within the ages of 46 to 60 and over (see Table 2.12.1).

Age %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
0 – 5	6.4	8.8	5.0	6.1	5.3	7.1	7.1	4.2
6 – 11	7.6	8.1	6.1	8.2	5.9	8.8	8.0	5.0
12 – 16	4.1	5.1	2.6	4.5	3.4	4.4	4.4	2.6
17 – 21	2.4	2.9	0.7	3.3	1.7	2.8	2.5	2.0
22 – 25	3.4	3.6	1.5	4.4	1.6	3.8	3.5	2.6
26 – 35	12.7	14.2	9.9	13.7	8.5	14.5	13.1	11.3
36 – 45	15.6	12.8	16.1	16.8	15.0	17.7	16.7	12.0
46 – 60	23.4	22.8	26.8	21.7	24.3	23.6	23.7	22.8
60+	24.4	21.7	31.3	21.3	34.3	17.2	21.0	37.5
Total	100	100	100	100	100	100	100	100

2.13 Total Group Size.

2.13.1 Table 2.13.1 outlines the number of people in each group out of the total 2001 respondents. As can be seen, half the visitors comprise couples, 13.3% arrive in groups of three and 17.4% as groups of four. Day trippers are more likely than others to be as a couple.

2.13.2 Overall, the average group size consisted of three people (3.01). For holidaymakers at gated sites, the average group size was 2.90; for holidaymakers at ungated sites, it was 3.09; for day trippers at gated sites, it was 2.59; and for day trippers at ungated sites, the average group size was 3.00. the average group size for the general visitor (the exit survey) was 3.2.

No. of people in group %	Overall	Exit Survey	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
1	4.3	3.0	4.1	5.1	4.1	2.5	4.0	5.5
2	52.2	48.1	58.7	49.7	56.9	51.4	50.1	59.5
3	13.3	13.8	12.3	13.7	13.2	11.7	13.6	12.2
4	17.8	18.0	16.6	18.5	15.7	20.9	18.5	15.0
5	5.7	7.5	4.5	5.8	5.0	6.8	6.2	4.2
6	3.4	5.4	2.1	3.3	2.2	2.5	3.9	1.5
7	0.9	1.2	0.6	1.0	1.0	1.2	1.0	0.7
8+	2.4	3.0	1.1	2.9	1.9	3.0	2.7	1.4
Total	100	100	100	100	100	100	100	100

2.14 Visitor Spend.

2.14.1 Table 2.14.1 details the average spend on travel; shopping for souvenirs; ice creams; clothes etc; eating and drinking out; entertainment and accommodation. The figures represent daily spend in £s per group. The biggest outlay is obviously accommodation for holiday visitors, followed by eating and drinking out, travel (petrol and car parking); and souvenirs.

2.14.2 Tables 2.14.2a and onward express actual, as opposed to average, daily spend and Table 2.14.3 compares average spend per group for holidaymakers/day trippers at gated/ungated sites.

Table 2.14.1: Average Daily Spend (in £s per group).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day Trippers
Travel	8.06	8.80	7.61	8.50	6.30	7.72	8.97
Buying Clothes	1.75	1.15	2.15	1.05	1.34	1.84	1.50
Other Shopping	7.82	7.43	8.08	7.64	6.19	8.29	6.57
Eating & Drinking Out	16.20	15.82	16.44	15.84	15.27	17.85	11.89
Entertainment	2.55	3.60	1.85	1.47	1.21	2.66	2.24
Other Spending	1.24	1.91	0.79	1.48	0.89	1.46	0.68
Accommodation	40.17	41.92	39.02	38.82	41.54	46.34	

Table 2.14.2a: Actual Daily Spend on Travel (in £s).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Nothing	6.4	2.5	9.0	2.7	8.1	8.3	1.4
1 – 5	40.9	39.9	41.5	41.2	50.0	41.4	39.5
6 – 10	33.1	36.2	31.0	35.9	29.3	32.7	33.9
11 – 20	15.5	16.7	14.7	15.3	10.9	13.6	20.3
Over 20	4.2	4.7	3.8	5.0	1.7	3.9	4.8

Table 2.14.2b: Actual Daily Spend on Buying Clothes (in £s).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Nothing	69.6	91.5	86.5	80.4	95.1	64.9	85.2
1 – 10	.9	1.1	1.3	1.1	.8	1.0	.9
11 - 20	1.7	2.1	2.2	1.6	1.6	1.6	2.0
Over 20	27.8	5.3	10.0	16.9	2.5	32.5	12.0

Table 2.14.2c: Actual Daily Spend Other Shopping (in £s).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Nothing	32.8	38.7	43.7	36.4	50.7	29.1	45.0
1 – 5	17.7	24.7	21.2	21.9	19.5	16.6	21.6
6 - 10	12.2	17.2	14.4	12.1	13.7	11.8	13.5
11 - 20	7.3	9.8	8.9	9.8	10.7	7.7	5.5
Over 20	30.1	9.6	11.9	19.9	5.5	34.7	14.4

Table 2.14.2d: Actual Daily Spend on Eating & Drinking Out (in £s).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Nothing	11.5	14.5	14.7	14.0	16.2	9.6	17.9
1 – 5	12.3	14.9	16.2	14.2	13.7	9.4	22.1
6 - 10	15.5	21.1	18.8	18.1	18.4	14.2	19.7
11 - 20	20.9	27.0	26.3	22.7	29.4	20.7	21.6
21 – 30	8.8	10.5	11.5	9.1	13.2	9.0	7.9
Over 30	31.1	12.0	12.5	21.9	9.1	37.0	10.9

Table 2.14.2e: Actual Daily Spend on Entertainment (in £s).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Nothing	55.4	61.7	76.3	69.7	88.5	51.9	66.9
1 – 10	10.3	17.1	10.4	7.6	8.5	9.7	12.0
11 - 20	4.7	9.4	3.7	2.7	2.5	4.6	5.0
Over 20	29.7	11.8	9.6	20.0	.5	33.7	16.1

Table 2.14.2f: Actual Daily Spend on Other Spending (in £s).

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers	Day trippers
Nothing	59.6	73.0	77.7	67.3	91.5	55.8	72.3
1 – 5	5.2	8.9	5.1	6.5	3.3	4.9	6.3
6 – 12	2.7	4.6	2.6	3.7	2.7	2.7	2.6
Over 12	32.5	13.4	14.6	22.5	2.5	36.6	18.7

	Overall	NT Gated	NT Ungated	Members	The Lizard	Holiday Makers
Nothing	12.8	23.4	11.5	18.1	6.8	6.3
1 – 15	9.9	10.0	14.4	9.2	12.6	12.8
16 – 25	4.6	2.2	8.2	4.8	12.6	6.0
26 – 40	11.0	11.2	15.9	11.2	23.3	14.2
41 – 60	10.8	13.7	13.8	13.3	15.1	14.0
61 – 80	3.4	3.8	4.8	3.7	6.0	4.5
81 – 100	43.7	29.8	27.4	35.4	19.2	37.5
Over 100	3.7	5.7	4.0	4.3	4.4	4.7

	Holiday visitors		Day visitors	
	Gated	Ungated	Gated	Ungated
Travel	9.07	7.02	8.33	9.73
Buying Clothes	1.10	2.25	1.25	1.81
Other Shopping	7.46	8.74	7.39	5.56
Eating & Drinking Out	17.97	17.79	12.34	11.37
Entertainment	3.97	1.99	2.99	1.33
Other spending	2.46	0.92	0.98	0.31
Accommodation	54.37	41.98		
Total	£96.39	£80.83	£33.28	£30.11

2.14.4.1 Table 2.14.4 below indicates the average daily spend per person for holidaymakers and day trippers at gated and ungated sites by using the average group sizes.

	Holiday visitors		Day visitors	
	Gated	Ungated	Gated	Ungated
Daily Spend/Head based on average group sizes	2.90	3.09	2.59	3.00
Travel	£3.13	£2.27	£3.22	£3.24
Clothes	£0.38	£0.73	£0.48	£0.60
Other Shopping	£2.57	£2.83	£2.85	£1.85
Eating & Drinking	£6.19	£5.80	£4.76	£3.79
Entertainment	£1.37	£0.64	£1.15	£0.44
Other Spending	£0.85	£0.30	£0.38	£0.10
Accommodation	£18.75	£13.59	£0.00	£0.00
Total	£33.24	£26.16	£12.85	£10.04

2.15 Status.

2.15.1 Table 2.15.1 depicts the status of respondents. Results show that holiday makers and visitors to the Lizard are more likely to be in full-time employment or self-employed. 37.2% of visitors to gated sites were retired; as were 39.1% of day trippers and 41% of National Trust members. This has resonance with the age characteristics shown in Table 2.12 and the growing significance and potential of this market segment.

%	In paid employment / self employed	Unemployed / redundant	Retired	In education	At home with children	Other	Total
Overall	66.9	1.6	29.9	1.0	0.4	0.3	100
Exit Survey	67.7	2.3	29.7		0.2		100
NT Gated	62.4	0.2	37.2	0.2		0.2	100
NT Ungated	69.6	2.2	25.1	1.0	0.7	0.4	100
The Lizard	71.5	1.4	22.7	2.7	1.1	0.5	100
Members	57.9	0.6	41.0	0.2		0.2	100
Holiday Makers	69.8	1.2	27.1	1.2	0.5	0.3	100
Day Trippers	57.2	3.1	39.1	0.2	0.2	0.2	100

2.16 Occupation.

2.16.1 Table 2.16.1 below depicts the profile of National Trust visitors in comparison to the general visitor to the South West. As can be seen, visitors to the National Trust are more likely to have a professional or managerial occupation (18.1% compared to 13.3%, and 35.2% compared to 27.4% respectively). Social classes A & B were represented more at gated sites and are also more likely to be members. In comparison occupations from social class C1, C2 are under-represented except in the case of day trippers.

2.16.2 (Those respondents who were retired were asked to state their former occupation).

%	Profess ional (A)	Manag erial (B)	Skilled non- manual (C1)	Skilled Manual (C2)	Semi- skilled (D)	Unskill ed (E)	Other	Total
Overall	18.1	35.2	14.1	23.9	6.7	0.4	1.6	100
Exit Survey	13.3	27.4	15.0	29.0	13.8	1.0	0.5	100
NT Gated	23.6	41.0	11.6	18.3	3.6	0.3	1.6	100
NT Ungated	16.6	34.8	15.4	25.3	5.6	0.2	2.1	100
The Lizard	17.6	34.3	14.4	25.5	6.2	0.3	1.7	100
Members	24.5	39.5	12.4	18.8	3.4	0.3	1.3	100
Holiday Makers	18.4	35.0	13.2	24.5	7.0	0.5	1.4	100
Day Trippers	17.0	35.8	17.2	21.9	5.7	0.2	2.2	100

2.16.3 For comparison with the British population as a whole, the census details regarding social class and occupation age can be broken down as follows: social classes A & B, 18%; C1s, 24%; C2s, 29% and social classes D & E, 29% also.

2.16.4 The social profile of UK tourists to the West Country are outlined in Table 2.16.2 (Source: WCTB, 1997).

Social Class %	All Trips	Holidays
AB	30%	28%
C1	34%	34%
C2	19%	20%
DE	17%	19%

2.17 Origin of Visitors.

2.17.1 Postcodes were collected from interviewees and are available for subsequent analysis by location of origin or as part of a market segmentation study.

2.18 Previous Visits.

2.18.1 To ascertain repeat visiting, respondents were asked how, often (if at all) they had been on a pleasure trip to the locality before. This applied to all respondents (except those at service stations).

2.18.2 Results show that overall, 35.8% were new visitors, 20.7% had visited within the last five years; a quarter visit regularly once a year and a further 3.1% visit once a month.

2.18.3 There appears to be little differentiation between repeat visits and gated/ungated sites. Day trippers, however, do display different behaviour; in that 23.4% were first time visitors and they were more likely to visit NT sites once per year or at least once per month (see Table 2.17.1).

%	Never	Not in the last 5 years	Within the last 5 years	At least once per year	At least once per month	More frequently
Overall (excluding exit survey)	35.8	14.1	20.7	25.1	3.1	1.3
NT Gated	36.9	15.7	20.8	22.0	3.5	1.1
NT Ungated	35.0	13.1	20.6	27.1	2.8	1.4
The Lizard	35.7	17.0	19.5	25.5	1.4	0.8
Members	33.1	13.6	23.4	25.5	3.3	1.1
Holiday Makers	40.5	16.8	21.8	20.4	0.4	0.0
Day Trippers	23.4	7.3	18.0	37.0	9.8	4.5

2.19 Analysis of Individual Locations.

The following section details further analysis for those locations where the sample size is large enough to warrant statistical tests.

2.19.1 Type of Trip.

2.19.1.1 Some locations particularly stand out as mostly attracting holiday makers as opposed to day trippers. Table 2.19.1 indicates the type of trip by location and clearly shows that Mullion; Rushy Green/Crantoek; Lanhydrock; Kynance and Lizard Point have an extremely high percentage of holidaymakers. Conversely, nearly half of the visitors at Montacute, Stourhead, Lacock and Hidcote were day trippers.

Table 2.19.1: Type of Trip by Location.		
Location	Holiday Makers (%)	Day Trippers (%)
Mullion	93.6	6.4
Montacute	56.7	43.3
Glastonbury Tor	68.7	31.3
Killerton	62.5	37.5
Corfe	78.0	22.0
Golden Cap	78.6	21.4
Stourhead	46.8	53.2
Lacock	53.8	46.2
Rushy Green/Crantoek	94.7	5.3
Bibury	63.8	36.3
Hidcote	46.3	53.7
Fingle Bridge	62.5	37.5
Lanhydrock	83.3	16.7
Kynance	91.9	8.1
Lizard Point	95.3	4.7

2.19.2 The Importance of Rural Landscape as a Motivating Factor.

2.19.2.1 Once again, visitors were asked to state on a scale of 1 to 10 where 10 was the main reason and 1 is not important, how important was the rural landscape in motivating their trip from home. Table 2.19.2 indicates that visitors to Fingle Bridge, Golden Cap, Kynance, Lacock and Rushy Green / Crantoek placed higher importance in the rural landscape than visitors to other locations. Whereas the visitors to Montacute, Killerton, Glastonbury Tor gave the rural landscape, on average, a significantly lower score. However the most frequently given score for all locations, except Killerton, was the maximum 10.

Table 2.19.2 The Importance of Rural Landscape as a Motivating Factor.		
(where 10 is very important and 1 is not at all important)		
Location %	Average score	The most frequent score
Mullion	8.7	10
Montacute	6.7	10
Glastonbury Tor	7.9	10
Killerton	7.5	8
Corfe	8.4	10
Golden Cap	9.1	10
Stourhead	8.4	10
Lacock	8.8	10
Rushy Green/Crantock	8.8	10
Bibury	8.6	10
Hidcote	8.0	10
Fingle Bridge	9.1	10
Lanhydrock	8.6	10
Kynance	8.9	10
Lizard Point	8.6	10

2.19.3 Pre-Planning Visits to National Trust Sites and the Importance of the Visit to their Overall Trip.

2.19.3.1 Overall there is a significant tendency to pre-plan visits to National Trust sites. For example 90.7% of visitors to Stourhead had pre-planned their visit prior to leaving home. Furthermore, visitors to Corfe, Lacock, Hidcote and Mullion were also more likely to have pre-planned their visit. Visitors to Killerton and Fingle Bridge, however, were less likely to have ear-marked a proposed visit to the site before leaving home.

2.19.3.2 Visitors who had pre-planned their visit to the NT location were asked to state, on a scale of 1 to 10, where 10 is very important, the importance of their NT visit to the overall satisfaction of their day trip or holiday.

2.19.3.3 Visitors to Hidcote, Kynance, Stourhead and Lacock placed a higher degree of importance to their particular visit with regard to their overall trip satisfaction. Whilst visitors to Fingle Bridge and Killerton gave less importance to their visit. The most frequently mentioned satisfaction indicator was 10 with the exception of Mullion and Killerton (see Table 2.19.3).

Table 2.19.3: The Importance of The National Trust sites to Overall Trip Satisfaction.

(where 10 is important and 1 is not at all important)

Location %	% Who pre-planned visit	The importance of their visit to overall satisfaction	Most frequently mentioned score
Mullion	70.8	7.9	8
Montacute	62.7	8.4	10
Glastonbury Tor	68.5	8.3	10
Killerton	50.0	7.6	8
Corfe	76.3	8.4	10
Golden Cap	69.6	8.4	10
Stourhead	90.7	8.7	10
Lacock	71.0	8.7	10
Rushy Green/Crantoek	69.6	8.4	10
Bibury	61.3	7.8	10
Hidcote	85.2	8.8	10
Fingle Bridge	48.6	7.5	10
Lanhydrock	61.4	8.3	10
Kynance	65.3	8.6	10
Lizard Point	68.3	8.1	10

2.19.4 National Trust Membership by Location.

2.19.4.1 Visitors to Montacute, Killerton, Lanhydrock and Hidcote were more likely to be members of the National Trust than visitors at other locations. Conversely, visitors to Glastonbury Tor, Lizard Point, Mullion, Rushy Green/Crantoek, Fingle Bridge, Kynance, Bibury and Golden Cap showed the least number of visitors who were NT members.

Table 2.19.4 National Trust Membership by Location.		
Location %	Members	Non-Members
Mullion	23.5%	76.5%
Montacute	92.3%	7.7%
Glastonbury Tor	17.2%	81.8%
Killerton	84.6%	15.4%
Corfe	47.0%	53.0%
Golden Cap	32.3%	65.6%
Stourhead	58.7%	41.3%
Lacock	49.0%	51.0%
Rushy Green/Crantoek	21.3%	78.7%
Bibury	33.8%	66.3%
Hidcote	79.4%	20.6%
Fingle Bridge	25.0%	75.0%
Lanhydrock	80.4%	19.6%
Kynance	30.6%	69.4%
Lizard Point	17.9%	82.1%

2.19.5 Group Size by Location.

2.19.5.1 Whereas couples are the most frequent group composition for all locations, certain sites attract larger groups; namely: Rushy Green / Crantock (groups of 4); Corfe; Lacock; Fingle Bridge; Kynance and Mullion (on average groups of three to four people) (see Table 2.19.5).

Table 2.19.5: Group Size by Location.		
Location	Average Groups size	Most frequent group size
Mullion	3.0	2
Montacute	2.5	2
Glastonbury Tor	2.7	2
Killerton	2.6	2
Corfe	3.6	2
Golden Cap	2.7	2
Stourhead	2.4	2
Lacock	3.1	2
Rushy Green/Crantock	4.0	2
Bibury	2.7	2
Hidcote	2.8	2
Fingle Bridge	3.2	2
Lanhydrock	2.8	2
Kynance	3.4	2
Lizard Point	2.8	2

2.19.6 Visitor's Age by Location.

2.19.6.1 Table 2.19.6 outlines the percentage of visitors aged between various categories. Some locations obviously attract young families; whilst other draw older visitors. Rushy Green /Crantock, Corfe; Kynance; Glastonbury Tor and Golden Cap are have a higher percentage of children aged between 0 and 16. Conversely visitors to Stourhead; Killerton; Lacock; Bibury; Hidcote, Lanhydrock and Fingle Bridge are more likely to attract visitors aged between 46 to 60 and over 60.

Table 2.19.6: The Percentage of Visitors Aged between the following categories by Location.

Age %	Mullion	Montacute	Glastonbury Tor	Killerton	Corfe	Golden Cap
0 – 5	4.4	3.9	4.8	4.8	9.9	4.9
6 – 11	5.9	7.7	10.4	5.9	19.3	10.9
12 – 16	3.5	3.4	5.2	3.3	6.9	6.0
17 – 21	2.6	2.1	4.8	0.7	1.4	1.9
22 – 25	2.6	2.6	8.2	0.3	1.9	5.7
26 – 35	14.1	17.6	20.4	11.1	9.4	11.7
36 – 45	19.1	18.0	19.3	14.4	22.9	25.7
46 – 60	26.4	27.0	23.0	22.2	19.0	22.6
60+	21.4	17.6	3.7	37.0	9.4	10.6
Total	100	100	100	100	100	100

Table 2.19.6: The Percentage of Visitors Aged between the following categories by Location (cont.)

Age %	Stourhead	Lacock	Rushy Green / Crantock	Bibury	Hidcote	Fingle Bridge
0 – 5	3.4	3.0	7.0	2.8	3.0	3.0
6 – 11	3.8	1.8	12.3	2.8	1.9	1.9
12 – 16	0.8	2.7	7.0	3.3	3.0	3.0
17 – 21	0.0	2.7	6.6	1.9	0.3	0.3
22 – 25	1.5	1.2	8.6	1.4	1.9	1.9
26 – 35	11.0	5.6	15.3	8.4	8.1	8.1
36 – 45	16.3	10.1	16.6	14.4	13.6	13.6
46 – 60	18.6	16.3	15.0	37.2	40.9	40.9
60+	44.5	56.7	11.6	27.9	28.0	28.1
Total	100	100	100	100	100	100

Age %	Lanhydrock	Kynance	Lizard Point
0 – 5	2.8	11.1	3.9
6 – 11	0.3	12.1	7.7
12 – 16	0.3	5.6	3.4
17 – 21	0.3	3.1	2.1
22 – 25	1.3	5.3	2.6
26 – 35	14.8	13.8	17.6
36 – 45	10.1	16.5	18.0
46 – 60	37.5	19.4	27.0
60+	32.6	13.1	17.6
Total	100	100	100

2.19.7 Social Class / Occupation of Visitors by NT Location.

2.19.7.1 Overall a high percentage of visitors to the National Trust locations have a managerial occupations (social class B). However visitors from professional or managerial occupations are particularly attracted to Montacute, Killerton, Corfe, Hidcote and Lanhydrock (see Table 2.19.7).

Table 2.19.7: Social Class / Occupation of Visitors by NT Location(%).								
Location %	Professional	Managerial	Skilled non-manual (C1)	Skilled Manual (C2)	Semi-skilled (D)	Unskilled (E)	Other	Total
	(A)	(B)						
Mullion	18.7	30.1	21.1	25.2	4.9			100
Montacute	27.2	41.7	7.8	16.5	4.9	1.0	1.0	100
Glastonbury Tor	13.1	40.4	19.2	20.2	1.0	1.0	5.1	100
Killerton	23.8	45.5	14.9	15.8				100
Corfe	16.0	45.0	10.0	27.0	2.0			100
Golden Cap	13.5	41.7	12.5	20.8	10.4		1.0	100
Stourhead	17.6	40.7	15.7	14.8	6.5	0.9	3.7	100
Lacock	25.7	32.7	19.8	13.9	5.0		3.0	100
Rushy Green/ Crantock	10.8	29.7	5.4	45.9	5.4		2.7	100
Bibury	15.8	38.2	19.7	21.1	5.3			100
Hidcote	29.5	40.0	10.5	16.2	1.9		1.9	100
Fingle Bridge	14.0	34.9	14.0	30.2	4.7		2.3	100
Lanhydrock	27.5	33.3	10.8	19.6	5.9		2.9	100
Kynance	17.8	38.1	12.7	22.0	6.8		2.5	100
Lizard Point	17.5	34.0	7.8	30.1	7.8	1.0	1.9	100

2.19.8 Previous Visits by Location.

2.19.8.1 Hidcote, Glastonbury Tor, Lizard Point, Lacock, Fingle Bridge and Killerton attract a healthy proportion of first time visits. Whilst Corfe, Bibury, Stourhead, Rushy Green/Crantock and Kynance have a higher number of repeat visitors. Killerton and Fingle Bridge have the highest proportion of frequent visitors (see Table 2.19.8).

Location %	Never	Not in the last 5 years	Within the last 5 years	At least once per year	At least once per month	More frequently	Total
Mullion	34.7	20.2	20.2	22.6	0.8	1.6	100
Montacute	42.3	17.3	16.3	20.2	3.8		100
Glastonbury Tor	46.5	6.1	23.2	21.2	2.0	1.0	100
Killerton	45.2	11.5	19.2	15.4	3.8	4.8	100
Corfe	16.0	21.0	29.0	32.0	2.0		100
Golden Cap	20.4	15.3	17.3	38.8	8.2		100
Stourhead	23.9	19.3	22.0	27.5	6.4	0.9	100
Lacock	45.2	9.6	19.2	20.2	2.9	2.9	100
Rushy Green/Crantock	29.3	9.3	20.0	40.0		1.3	100
Bibury	26.3	15.0	36.3	20.0	1.3	1.3	100
Hidcote	52.3	8.4	16.8	20.6	1.9		100
Fingle Bridge	45.5	11.4	9.1	21.6	8.0	4.5	100
Lanhydrock	41.2	16.7	21.6	16.7	2.9	1.0	100
Kynance	31.2	14.4	23.2	28.8	1.6	0.8	100
Lizard Point	45.3	17.0	16.0	20.8	0.9		100

2.20 Further Analysis by National Trust Regions.

The following section details further analysis for individual National Trust regions.

2.20.1 Type of Trip.

2.20.1.1 Cornwall's National Trust visitors are predominantly holidaymakers (91.1%). Devon and Wessex show equal proportions of holiday makers to day trippers with the Severn region displaying the highest number of day trippers (see Table 2.20.1)

Region %	Holiday Makers (%)	Day Trippers (%)	Total number of completed interviews
Cornwall	91.1%	8.9%	571
Devon	62.5%	37.5%	192
Wessex	62.9%	37.1%	622
Severn	53.7%	46.3%	188
Total NT			1573
Exit Survey			428
Grand Total			2001

2.20.2 The Importance of Rural Landscape as a Motivating Factor.

2.20.2.1 On a scale of 1 to 10 where 10 was the main reason and 1 is not important, visitors to Cornwall placed the greatest importance on the rural landscape as motivating their overall trip. The most frequent score for all regions is the maximum 10 (see Table 2.20.2).

Region	Average score	The most frequent score
Cornwall	8.7	10
Devon	8.2	10
Wessex	8.3	10
Severn	8.2	10

2.20.3 Pre-Planning Visits to National Trust Sites and the Importance of the Visit to their Overall Trip.

2.20.3.1 Visitors to the Wessex and Severn National Trust sites were more likely to have pre-planned their visit prior to leaving home, and placed the greatest importance on the visit to their overall satisfaction of their trip. The significant difference in the percentage who pre-planned their visit can partly be explained by the higher proportion of day trippers who by definition pre-plan a trip out.

2.20.3.2 Visitors to Devon National Trust sites are the least likely to have pre-planned their visit prior to leaving home, and in accordance, place less importance on the visit to the overall satisfaction of their holiday (see Table 2.20.3).

Table 2.20.3: The Importance of The National Trust sites to Overall Trip Satisfaction.

(where 10 is important and 1 is not at all important)

Region	% Who pre-planned visit	The importance of their visit to overall satisfaction	Most frequently mentioned score
Cornwall	66.7	8.3	10
Devon	49.4	7.6	10
Wessex	73.2	8.4	10
Severn	75.0	8.4	10

2.20.4 National Trust Membership by NT Region.

2.20.4.1 Table 2.20.4 shows that visitors to the National Trust sites in the Severn and Devon regions are the most likely to be National Trust members, whereas Cornwall's National Trust visitors are the least likely to be members.

Table 2.20.4: National Trust Membership by NT Region.

Region %	Members	Non-Members
Cornwall	36.9%	63.1%
Devon	57.3%	42.7%
Wessex	49.4%	50.1%
Severn	59.9%	40.1%

2.20.5 Group Size by NT Region.

2.20.5.1 Overall, Cornwall's National Trust sites attract slightly larger groups of approximately three people, the most frequently occurring group size, however, for all regions remains 2 (see Table 2.20.5).

Region	Average Groups size	Most frequent group size
Cornwall	3.2	2
Devon	2.9	2
Wessex	2.8	2
Severn	2.8	2

2.20.6 Visitor's Age by NT Region.

2.20.6.1 When comparing all regions, the percentage of children aged between 0 and 16 is constant over Cornwall, Devon and Wessex's sites. Visitors to the Severn's National Trust attractions are less likely, however, to be accompanied by children and are more likely to be aged between 46 to 60. (see Table 2.20.6).

Age %	Cornwall	Devon	Wessex	Severn
0 – 5	6.7	6.2	5.4	2.7
6 – 11	7.8	7.8	8.4	2.3
12 – 16	4.0	3.4	3.8	2.9
17 – 21	2.9	2.7	2.0	1.0
22 – 25	4.0	2.5	3.3	1.7
26 – 35	15.6	12.1	10.3	8.2
36 – 45	15.6	15.2	18.5	14.0
46 – 60	24.0	19.7	20.0	39.4
60+	19.4	30.0	28.2	27.9
Total	100	100	100	100

2.20.7 Social Class / Occupation of Visitors by NT Region

2.20.7.1 Visitors to Cornwall's NT sites are less likely to have a professional or managerial occupation. Conversely the visitor to the sites in the Severn region are more likely to be of social class A or B.

Region %	Professional (A)	Managerial (B)	Skilled non-manual (C1)	Skilled Manual (C2)	Semi-skilled (D)	Unskilled (E)	Other	Total
Cornwall	18.3	32.8	13.1	27.6	6.1	0.2	2.0	100
Devon	19.3	40.6	14.4	22.5	2.1		1.1	100
Wessex	19.2	39.8	14.3	19.0	4.9	0.5	2.3	100
Severn	23.8	39.2	14.4	18.2	3.3		1.1	100

2.20.8 Previous Visits by NT Regions

2.20.8.1 Devon's National Trust sites are more likely to attract first time visitors. They are also inclined to show the most frequent usage. Whereas Wessex and Cornwall regions display a higher proportion of repeat visitors (see Table 2.20.8).

Region %	Never	Not in the last 5 years	Within the last 5 years	At least once per year	At least once per month	More frequently	Total
Cornwall	34.9	15.4	21.1	26.3	1.4	0.9	100
Devon	45.3	11.5	14.6	18.2	5.7	4.7	100
Wessex	32.0	14.6	20.9	27.5	4.2	.8	100
Severn	41.2	11.2	25.1	20.3	1.6	0.5	100

Questionnaire.

The table below represents the questionnaire used both on National Trust sites and amongst visitors to the region returning home.

1. What type of trip are you on? <input type="checkbox"/> ₁ Holiday <input type="checkbox"/> ₂ Day trip from home (Go to Q.2) What is/was the nearest <u>TOWN</u> to where you are/were staying? <input type="checkbox"/> (tick if touring and record most recent location) Staying how many nights in the <u>South West</u>? Refer to map. Number		
2. Which of the following activities have you (or will you) take part in on this holiday / day trip? Tick all that apply - ignore 'unsure'.		
<input type="checkbox"/> ₁ Visit cities or towns	<input type="checkbox"/> ₁ Explore country villages	
<input type="checkbox"/> ₁ Go to the beach	<input type="checkbox"/> ₁ Walk on the coastline	
<input type="checkbox"/> ₁ Take part in organised sports	<input type="checkbox"/> ₁ Walk on the moors	
<input type="checkbox"/> ₁ Go sightseeing in the countryside	<input type="checkbox"/> ₁ Walk in the countryside	
<input type="checkbox"/> ₁ Visit historic houses	<input type="checkbox"/> ₁ Visit museums or galleries	
<input type="checkbox"/> ₁ Go shopping for non-essentials	<input type="checkbox"/> ₁ None of these	
3. On a scale of 1 to 10, where 10 was the main reason and 1 is not important . How important was rural landscape in motivating your trip from home? By rural landscape I mean the fields, woods, moors, villages and coastline. Score		
4. On a scale of 1 to 10. How important was/is in making <u>this</u> holiday / day trip enjoyable? Answer all - write U' for 'unsure'.		
___ Peace / tranquillity	___ Unspoilt / uncommercialised	
___ Beautiful natural scenery	___ Range of interesting places to visit	
___ Good places to eat and drink	___ Good beaches	
___ Friendly local people	___ Quality of towns and villages	
___ Quality of the countryside	___ Cleanliness / lack of pollution	
(When using the word 'Quality' I mean that they are 'well maintained')		
5. Have you (or will you) visit any National Trust paths, land or property in the <u>South West</u> on this trip? Refer to map.		
<input type="checkbox"/> ₁ Yes	<input type="checkbox"/> ₂ No	
<input type="checkbox"/> ₃ Unsure	<input type="checkbox"/> ₄ Do not know about National Trust	
If <u>YES</u>, Which ones?	Did you plan to go there before you left home?	On a scale of 1-10, how important was it to your trip overall
Name of location & county:	Pre-planned?	Importance 1-10
1. Here.....	Yes <input type="checkbox"/> ₁ No <input type="checkbox"/> ₂	___
2.	Yes <input type="checkbox"/> ₁ No <input type="checkbox"/> ₂	___
3.	Yes <input type="checkbox"/> ₁ No <input type="checkbox"/> ₂	___
4.	Yes <input type="checkbox"/> ₁ No <input type="checkbox"/> ₂	___
5.	Yes <input type="checkbox"/> ₁ No <input type="checkbox"/> ₂	___
6.	Yes <input type="checkbox"/> ₁ No <input type="checkbox"/> ₂	___

6. What picture comes to mind when you think of the National Trust?																						
<i>Write as fully as possible.</i>																						
.....																						
.....																						
7. On a scale of 1 to 10, how important a rôle does the National Trust play in looking after the following aspects of England's heritage?																						
<i>Answer all - write U' for 'unsure'.</i>																						
<table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">___ Historic buildings</td> <td style="width: 33%;">___ Coastline</td> <td style="width: 33%;">___ Rural life</td> </tr> <tr> <td>___ Farmland</td> <td>___ Villages</td> <td>___ Nature conservation</td> </tr> <tr> <td colspan="3">___ Other Countryside (moor/woodland)</td> </tr> </table>	___ Historic buildings	___ Coastline	___ Rural life	___ Farmland	___ Villages	___ Nature conservation	___ Other Countryside (moor/woodland)															
___ Historic buildings	___ Coastline	___ Rural life																				
___ Farmland	___ Villages	___ Nature conservation																				
___ Other Countryside (moor/woodland)																						
8. In broad terms, what would be the impact on the countryside if the National Trust were to disappear tomorrow?																						
<table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/>₁ Very beneficial</td> <td><input type="checkbox"/>₄ Unsure</td> </tr> <tr> <td><input type="checkbox"/>₂ Fairly beneficial</td> <td><input type="checkbox"/>₅ Fairly harmful</td> </tr> <tr> <td><input type="checkbox"/>₃ None</td> <td><input type="checkbox"/>₆ Very harmful</td> </tr> </table>	<input type="checkbox"/> ₁ Very beneficial	<input type="checkbox"/> ₄ Unsure	<input type="checkbox"/> ₂ Fairly beneficial	<input type="checkbox"/> ₅ Fairly harmful	<input type="checkbox"/> ₃ None	<input type="checkbox"/> ₆ Very harmful																
<input type="checkbox"/> ₁ Very beneficial	<input type="checkbox"/> ₄ Unsure																					
<input type="checkbox"/> ₂ Fairly beneficial	<input type="checkbox"/> ₅ Fairly harmful																					
<input type="checkbox"/> ₃ None	<input type="checkbox"/> ₆ Very harmful																					
9. Are you, or any of your group here today, members of the National Trust?																						
<input type="checkbox"/> ₁ Yes <input type="checkbox"/> ₂ No <input type="checkbox"/> ₃ Unsure																						
10. How old are you and any members of your group?																						
(Please write in the <u>NUMBER OF PEOPLE</u> in each age category and tick respondent separately)																						
<table style="width: 100%; border: none;"> <tr> <td style="text-align: left;">Age</td> <td style="text-align: center;">0-5</td> <td style="text-align: center;">6-11</td> <td style="text-align: center;">12-16</td> <td style="text-align: center;">17-21</td> <td style="text-align: center;">22-25</td> <td style="text-align: center;">26-35</td> <td style="text-align: center;">36-45</td> <td style="text-align: center;">46-60</td> <td style="text-align: center;">60 +</td> <td style="text-align: right;">Total</td> </tr> <tr> <td style="text-align: left;">Number</td> <td style="text-align: center;">✓ Respondent</td> <td style="text-align: center;"><input type="checkbox"/>₁</td> <td style="text-align: center;"><input type="checkbox"/>₂</td> <td style="text-align: center;"><input type="checkbox"/>₃</td> <td style="text-align: center;"><input type="checkbox"/>₄</td> <td style="text-align: center;"><input type="checkbox"/>₅</td> <td style="text-align: center;"><input type="checkbox"/>₆</td> <td colspan="2"></td> <td></td> </tr> </table>	Age	0-5	6-11	12-16	17-21	22-25	26-35	36-45	46-60	60 +	Total	Number	✓ Respondent	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆			
Age	0-5	6-11	12-16	17-21	22-25	26-35	36-45	46-60	60 +	Total												
Number	✓ Respondent	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆															
* Approximately how much will you and your immediate group spend TODAY																						
11. ONLY in and around the South West on: <i>Write in if zero & do not bracket groups.</i>																						
Travel (petrol / parking / fares) £																						
Buying clothes £																						
Other shopping £																						
Eating and drinking out (pubs / restaurants etc) £																						
Entertainment (including entry to attractions) £																						
Other Spending £																						
Accommodation (<i>last night if applicable, otherwise tonight</i>) £																						
12. What is your UK postcode? (or which Country do you live in)?																						
___ ___ ___ or overseas country																						
13. What is the current situation of the main wage earner in your household?																						
<table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/>₁ In paid employment / Self-employed</td> <td><input type="checkbox"/>₄ In education (i.e. student)</td> </tr> <tr> <td><input type="checkbox"/>₂ Unemployed / redundant</td> <td><input type="checkbox"/>₅ At home / with children</td> </tr> <tr> <td><input type="checkbox"/>₃ Retired</td> <td><input type="checkbox"/>₆ Other</td> </tr> </table>	<input type="checkbox"/> ₁ In paid employment / Self-employed	<input type="checkbox"/> ₄ In education (i.e. student)	<input type="checkbox"/> ₂ Unemployed / redundant	<input type="checkbox"/> ₅ At home / with children	<input type="checkbox"/> ₃ Retired	<input type="checkbox"/> ₆ Other																
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<input type="checkbox"/> ₂ Unemployed / redundant	<input type="checkbox"/> ₅ At home / with children																					
<input type="checkbox"/> ₃ Retired	<input type="checkbox"/> ₆ Other																					
What is (or used to be) their job title / occupation?																						
14. NT sites only																						
How often, if at all, have you been on a pleasure trip to this locality before?																						
<table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/>₁ Never</td> <td><input type="checkbox"/>₄ At least once a year</td> </tr> <tr> <td><input type="checkbox"/>₂ Not in the last five years</td> <td><input type="checkbox"/>₅ At least once a month</td> </tr> <tr> <td><input type="checkbox"/>₃ Less than once a year</td> <td><input type="checkbox"/>₆ More frequently</td> </tr> </table>	<input type="checkbox"/> ₁ Never	<input type="checkbox"/> ₄ At least once a year	<input type="checkbox"/> ₂ Not in the last five years	<input type="checkbox"/> ₅ At least once a month	<input type="checkbox"/> ₃ Less than once a year	<input type="checkbox"/> ₆ More frequently																
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<input type="checkbox"/> ₃ Less than once a year	<input type="checkbox"/> ₆ More frequently																					

A.3 Direct Impact of the National Trust in the South West.

A3.1 Methodology.

3.1.1 The direct impact element of the study was split into four elements:

- National Trust direct expenditure.
- Location of National Trust Suppliers.
- Jobs supported through farm and other business tenancies.
- Spend by volunteers staying away from home (Acorn Camps).

Information on each of these elements was collected and combined to produce local authority summaries, which are combined to National Trust regions and to the South West standard planning region.

3.1.2 While the inclusion of spend on properties and administration is easily related to the notion of the impact of the Trust, the enterprises run by the Trust and others and the effect of volunteers warrants further explanation.

3.1.3 Trust enterprises are an extension of the 'core commercial activity' of offering experience of the nation's heritage in return for payment. They are managed by the trust and are the result of the Trust's decisions to respond to market forces. Typically these commercial activities include catering, shops (both on National Trust properties and elsewhere) and holiday cottages.

3.1.4 The analysis of expenditure covers properties (both gated and ungated), regional offices, enterprises plus the headquarters enterprise, finance and operations sections within the South West (at Caithness House/Heywood Stable Block, Heywood House and Cirencester respectively).

3.1.5 The effects of volunteers are included as they represent labour which would otherwise be purchased and has an economic value. As the service is given freely by the volunteers the impact is measured by the expenditure during the period of service as a proxy for the payment that they would have otherwise received and spent. The researchers are aware of the work carried out by the National Trust on the various values of different voluntary activities but have instead preferred to use estimates of the actual impact rather than the notional benefit to the Trust.

3.1.6 In order to use a common unit of measurement, the analysis is mainly based upon expenditure, combined in a few areas with other more appropriate measures. Expenditure is used rather than income as it represents an active expression of activity rather than the more passive receipt of income. The other measures include type and size of farm and other business tenancies along with spend by volunteers staying away from home.

3.2 National Trust Direct Expenditure.

- 3.2.1 The Trust expenditure section of the Direct Impact element of the study is based on categorising the purchases made by the Trust and estimating the jobs supported in those businesses in receipt of this spend. The study also estimates the multiplier effect of this spend (i.e. the second and subsequent rounds of spend and the jobs supported).
- 3.2.2 The basis for estimating the jobs directly supported and the multiplier effects is drawn from the Cambridge Model, which draws upon a variety of published and unpublished data.
- 3.2.3 The 1997-1998 financial year accounts were used to provide the information on National Trust spend. Each of the regions was split into budget groupings and expenditure information produced for these budgets using level 6 budget codes (the level common to all Trust regions). Following discussions with the Trust the level 6 account codes were categorised into five types of expenditure to be used for the study, plus a sixth category for expenditure types not included. This last category included items such as adjustments for bad debts, internal management fees, settlement discounts etc.
- 3.2.4 While this approach was judged to be the most suitable, there are some compromises. Much of this relates to the Trust account codes covering activity areas (such as repairs, or marketing) while this exercise prefers types of purchases (such as 'building materials' etc). However it is considered that the effect on the overall study will be minimal.
- 3.2.5 The following table lists the categorised account codes.

	Properties		Regional Management		Public Affairs		Enterprises	
	Operating	Project	Operating	Project	Operating	Project	Operating	Project
Direct Employment	PWAG SWAG RWAG EMPL	NWAG	RMWAG RRWAG ROSTAF	RNWAG	PAMWAG PARWAG PASWAG PNWAGR PNWAGX PRWAGX	PSTFNR	STAF	
Construction/maintenance	GMAI GREP PREP SECU CLAB CONT	NPRJ NREP NIMP NHBM NRIN NRCO NETP NCON NHBC	RREPS	RNREP RNOTHE			REPS	
Other services	MARK ADVE TRAI INSE AFEE	NOTHE	RRTRAI RPTRAI RTEMP RFEES RINSE RRECR		PAOTHE PMNEWS PMOPEN PMCEN PPVISG PPJLFL PPDIST PPMEDA PPJPRO PPMRES	PNMPNR PMEMNR PPMANR PRELNR		
Retail/Primary/Wholesale	EQUI TREE DEPN DISP CONP MCEX OTHE EDUC		RNTVS RCLEAN RSTAT REQUI RLEAS RCONP RDEPN RDISP RMAPS ROEXP		PANTVS PREXHI PRLIB PRPRES PROPEN PREDUC PRINFO PRPUBL PRCONP PRDEPN PROTHE PRDISP	PAETPR	COST EQUI OEXP DEPN DISP WARE CONS Sunday OTHE	
Other costs	HEAT RATE TELE TRAV VEXP		RTRAV RVOLS RHEAT RRATE RRENT RTELE RPOST RCOMM RBANK RMVEXP		PATRAV PAVOLX PNRUNC PNTRAI PNMOTHE E PPTRAF PPOTHE		RENT HEAT STOT ELEC	

3.3 Location of suppliers.

- 3.3.1 The categorised expenditure element of the study was linked to a separate exercise to determine where the Trust actually spent its money. This exercise was undertaken to determine whether the benefits of the different types of spend were at a local, regional or national level – i.e. the strength of the local linkages.
- 3.3.2 A sample of transactions from different types of properties from each region was investigated to determine the location of the supplier. Transactions were investigated for properties, enterprises, regional office and public affairs for each region. Each of the sample transactions was categorised in the same way as the spend by budget above (necessitating the use of level 7 codes in some instances) and then classified into:
- Within the Local Authority District.
 - Elsewhere within the National Trust Region.
 - Elsewhere within the South West.
 - Elsewhere in the UK.
- 3.3.3 The geographical pattern of spend was then applied as appropriate to the actual expenditure categories within each of the regions to produce total expenditure within the district, elsewhere in the National Trust region, and so on. This was undertaken by expenditure category in order that the different employment and linkage characteristics of could be applied. Regional Office and Public Affairs geographical pattern of spend was treated as one.
- 3.3.4 During this element of the study, 11,000 transactions were investigated across the four National Trust regions. When sampling expenditure on items such as construct and maintenance, Public Affairs were deemed to have the same pattern of purchases as Regional Office, and Enterprises the same as Properties. Samples taken from Enterprises concentrated upon the pattern of stock used. There was no split between the recurring and non-recurring expenditure (projects) although transactions were sampled from both. The geographical distribution of property expenditure at Heywood House, Caithness and Cirencester was deemed to mirror that of the Wessex regional office at Eastleigh Court.
- 3.3.5 Expenditure on direct employment (i.e. wages) was judged to have occurred in the district where the job was based on the basis that the transaction occurred at the place of employment.

3.3.6 Transactions were sampled from:

Region	Name	Type
Cornwall	Lizard building manager	Property
	Antony House	Property
	Cotehele	Property
	South East Cornwall Properties	Property
	Lizard holiday cottages	Enterprise
	Boscastle shop	Enterprise
	Carnewas Cafe	Enterprise
	Regional Office/Public Affairs	Regional
Devon	Castle Drogo	Property
	Knightshayes	Property
	Knightshayes projects	Property
	Killerton Café	Enterprise
	Sidmouth Shop	Enterprise
	Regional Office/Public Affairs	Regional
Severn	Sherborne	Property
	Hidcote	Property
	Tewkesbury Shop	Enterprise
	Regional Office/Public Affairs	Regional
Wessex	Avebury	Property
	Hardys Cottage	Property
	Corfe Shop	Enterprise
	Montacute Cafe	Enterprise
	Regional Office/Public Affairs	Regional

3.4 Farm & Business Tenancies.

3.4.1 Information was collected on the size and type of farm and business tenancies. Farm tenancies were categorised on the following basis:

- Specialist Dairy.
- Mainly Dairy.
- Lowland Cattle & Sheep.
- Disadvantaged Area Cattle & Sheep.
- Severely Disadvantaged Area Cattle & Sheep.
- Mixed Mainly Crops.
- Large Dairy & Arable.

3.4.2 Business Tenancies were restricted to those with at least £500 annual rent and categorised on the following basis:

- Light industrial/Store
- Retail/Café
- Sports facility/car park
- Relay station/MOD land

3.4.3 Direct and indirect employment through farm tenancies was estimated using information from the Agricultural Economics Unit at Exeter University. Based upon work undertaken for the Ministry of Agriculture, Fisheries and Food, data was used on the employment supported per hectare for different types of farm.

3.4.4 Direct and indirect employment through other business tenancies was estimated using unpublished information collected by Geoff Broom Associates.

3.5 Spend by Volunteers.

3.5.1 Information was collected about the number of nights spent by volunteers on Acorn camps. The spend per night to visit friends and relatives was drawn from the regional United Kingdom Tourism Survey 1996 and used as a proxy for the likely spend by volunteers. The same survey provided information on the likely type of spend and this was used to distribute the nightly amount across different sections of the economy.

3.5.2 Data from the Cambridge model was then used to determine linkage and multiplier effects.

3.5.3 Volunteers who were not staying away from home were not included in this analysis as it was judged that there would be little if any additional spend resulting.

3.6 Local Information.

3.6.1 The following tables provide regional, county, unitary and district level summaries.

3.6.2 Information on each county is in two tables. The first covers the Trust's portfolio of assets and estimates of visitor numbers. The second covers the expenditure by the Trust and its tenants, combined with the expenditure by visitors and volunteers (off Trust sites), along with estimates of FTE jobs supported. Note that the visitor numbers and spend are split between gross (that which probably would have occurred anyway) and additional. Further explanation can be found in chapter 3.

3.6.3 Note that the county figure is more than the sum of the districts as it will include expenditure outside the district but within the county.

**Avon
National Trust assets and visitors**

	Bristol	Bath & NES	South Glos	North Somerset	Avon
Number of NT Gated sites	1	2	2	1	6
Number of NT Ungated sites	2	2	2	6	12
Number of NT sites with no access	0	0	0	2	2
Tenanted farmland (acres)	0	437	517	204	1,158
Tenanted business properties	0	0	0	0	0
Number of holiday cottages	0	0	0	0	0
Visits to gated sites	30,700	241,700	97,100	13,100	382,600
Estimated visits to ungated sites	573,300	32,600	17,000	41,400	664,300
Estimated holiday visitors	276,700	147,200	44,300	24,100	492,300
Estimated day trip visitors from home	228,800	94,000	51,200	21,500	395,500
Trip expenditure by visitors	£3,505,500	£2,087,800	£629,900	£313,800	£6,537,000
Day spend by holidaymakers	£2,329,900	£1,165,200	£636,000	£230,900	£4,362,000
Accommodation spend by holidaymakers	£3,833,300	£2,638,100	£797,400	£357,100	£7,625,900
Gross expenditure	£9,668,800	£5,891,100	£2,063,300	£901,800	£18,525,000
Estimated net additionality	2%	25%	24%	5%	12%
Net expenditure by visitors	£184,200	£1,481,800	£500,900	£41,900	£2,208,700

**Avon
National Trust impacts**

	Bath & NES	Bristol	South Gloucestershire	North Somerset	Avon
	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure
1. National Trust employment					
Wages	£132,340	12	£0	9	£5,990
2. National Trust Supply Chain					
Construction	£7,997	0	£22,357	0	£29,568
Services	£249	0	£400	0	£184
Supplies	£6,514	0	£22,243	0	£2,051
Other	£281	0	£13,513	0	£589
Total NT Supply chain	£15,041	0	£58,513	1	£32,392
3. National Trust Tenant					
Farm tenancies	£51,679	5	£24,612	2	£62,344
Business tenancies	£0	0	£0	0	£0
Total NT tenants	£51,679	5	£24,612	2	£62,344
4. National Trust Tenant Supply Chain					
Farm tenancies	£51,500	1	£20,500	0	£52,000
Business tenancies	£0	0	£0	0	£0
Total NT tenants supply chain	£51,500	1	£20,500	0	£52,000
5. External indirect impacts					
Volunteers	£0	0	£0	0	£0
Holiday cottages	£0	0	£0	0	£0
Visitors to sites: gross	£5,891,090	142	£2,063,301	48	£901,762
Visitors to sites: net	£1,481,756	36	£500,696	12	£41,921
Total gross external impact	£5,891,090	142	£2,063,301	48	£901,762
Total net external impact	£1,481,756	36	£500,696	12	£41,921
6. Induced impacts					
Gross induced impact	£915,165	16	£234,044	6	£105,449
Net induced impact	£174,232	5	£77,803	2	£19,465
Total direct, indirect, induced					
Gross	£6,766,816	176	£2,574,480	66	£1,159,936
Net	£1,916,548	59	£855,635	26	£214,111

	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure
	£311,840	24	£294,904	6	£11,238
			£90,412	1	£73,061
			£469,615	8	
			£148,635	12	£0
			£148,635	12	
			£124,000	2	£0
			£124,000	2	
			£0	0	£0
			£18,524,959	472	£2,208,725
			£2,208,725	53	£18,524,959
			£2,208,725	53	
			£3,915,810	104	£652,563
			£652,563	20	
			£23,494,859	622	£3,915,378
			£3,915,378	120	

**Cornwall
National Trust Assets and visitors**

	Caradon	Carrick	Kerrier	North Cornwall	Penwith	Restormel	Cornwall
Number of NT Gated sites	3	1	2	3	3	1	13
Number of NT Ungated sites	10	10	12	18	10	7	67
Number of NT sites with no access	1	0	1	1	1	0	4
Tenanted farmland (acres)	1,868	1,429	1,944	1,956	1,557	1,080	9,834
Tenanted business properties	2	2	7	4	1	2	18
Number of holiday cottages	13	30	15	17	1	9	85
Visits to gated sites	102,500	94,000	71,000	276,000	249,400	50,700	843,600
Estimated visits to ungated sites	329,600	246,800	638,100	752,000	474,000	597,000	3,037,500
Estimated holiday visitors	309,100	253,700	488,800	775,200	557,900	503,100	2,887,800
Estimated day trip visitors from home	52,600	31,600	104,700	85,100	47,600	39,000	360,600
Trip expenditure by visitors	£4,025,900	£3,323,000	£6,238,100	£10,142,700	£7,382,300	£6,399,200	£37,511,200
Day spend by holidaymakers	£563,000	£341,300	£1,061,100	£919,000	£524,000	£400,500	£3,828,900
Day spend by day visitors from home	£4,578,700	£3,808,400	£6,895,200	£11,606,600	£8,574,600	£7,039,800	£42,503,300
Accommodation spend by holidaymakers	£9,167,600	£7,472,600	£14,214,500	£22,668,300	£16,480,900	£13,839,500	£83,843,400
Gross expenditure	27%	31%	27%	26%	33%	30%	29%
Estimated net additionality	£2,496,100	£2,302,600	£3,784,600	£5,842,600	£5,438,600	£4,194,200	£24,068,700
Net expenditure by visitors							

**Cornwall
Impact of National Trust**

	Caradon	Carrick	Kenner	North Cornwall	Penwith	Restormel	Cornwall							
	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs						
1. National Trust employment														
Wages	£494,216	54	£517,458	57	£267,190	24	£1,496,060	111	£431,497	27	£39,772	4	£3,246,193	277
2. National Trust Supply Chain														
Construction	£244,778	5	£238,766	5	£363,371	7	£313,158	6	£387,964	8	£38,143	1	£2,082,932	42
Services	£8,888	0	£8,517	0	£10,100	0	£18,384	1	£16,295	1	£1,767	0	£248,214	10
Supplies	£63,804	1	£91,438	1	£48,676	0	£159,144	2	£70,563	1	£4,495	0	£963,128	10
Other	£8,990	0	£9,836	0	£3,908	0	£28,001	0	£4,684	0	£436	0	£117,640	1
Total NT supply chain	£326,460	6	£348,557	6	£426,055	8	£518,687	9	£479,506	9	£44,841	1	£3,411,914	62
3. National Trust Tenant														
Farm tenancies	£223,304	19	£178,612	15	£274,624	23	£233,990	20	£192,816	16	£135,049	11	£1,238,395	103
Business tenancies	£8,750	0	£248,500	5	£391,000	8	£108,000	2	£4,000	2	£45,500	1	£805,750	16
Total NT tenants	£232,054	19	£427,112	20	£665,624	31	£341,990	22	£196,816	16	£160,549	12	£2,044,145	119
4. National Trust Tenant Supply Chain														
Farm tenancies	£186,000	4	£149,000	3	£229,000	5	£195,000	4	£160,500	3	£112,500	2	£1,032,000	21
Business tenancies	£1,000	0	£25,000	1	£39,000	1	£11,000	0	£500	0	£4,500	0	£81,000	2
Total NT tenants supply chain	£187,000	4	£174,000	3	£268,000	5	£206,000	4	£161,000	3	£117,000	2	£1,113,000	22
5. External indirect impacts														
Volunteers	£0	0	£2,907	0	£10,251	0	£3,043	0	£3,349	0	£612	0	£20,162	0
Holiday cottages	£280,432	5	£647,169	12	£323,584	6	£366,713	7	£21,565	0	£194,151	4	£1,833,614	35
Visitors to sites: gross	£9,167,599	232	£6,962,367	183	£14,326,112	366	£21,596,903	550	£14,993,018	392	£13,839,457	390	£80,885,456	2,112
Visitors to sites: net	£2,496,136	63	£2,302,000	58	£3,784,000	97	£5,842,000	148	£5,438,000	137	£4,194,171	118	£24,056,306	622
Total gross external impact	£9,446,031	237	£7,612,443	195	£14,659,947	373	£21,966,659	557	£15,017,932	393	£14,034,220	394	£82,739,232	2,148
Total net external impact	£2,776,568	68	£2,216,810	53	£4,129,712	103	£6,034,935	151	£5,007,192	131	£4,388,934	122	£24,554,151	629
6. Induced impacts														
Gross induced impact	£1,068,776	32	£907,957	28	£1,628,682	44	£2,452,940	70	£1,628,675	45	£1,441,638	41	£16,510,887	526
Net induced impact	£401,630	15	£368,394	14	£575,658	17	£859,767	30	£827,601	19	£477,110	14	£6,873,881	222
Total direct, indirect, induced														
Gross	£11,756,537	351	£9,987,527	310	£17,915,487	485	£26,982,335	772	£17,915,426	493	£15,856,020	454	£111,065,381	3,155
Net	£4,417,928	166	£4,052,331	154	£6,332,239	189	£9,457,440	326	£6,903,612	205	£5,248,205	155	£41,243,283	1,332

**Devon
National Trust assets and visitors**

	East Devon	Exeter	Mid Devon	North Devon	Plymouth	South Hams
Number of NT Gated sites	3	0	3	1	1	1
Number of NT Ungated sites	9	0	3	12	3	9
Number of NT sites with no access	1	0	0	1	0	2
Tenanted farmland (acres)	64	0	109	4,793	295	9,958
Tenanted business properties	0	0	0	2	0	5
Number of holiday cottages	6	0	0	7	1	4
Visits to gated sites	63,200	0	433,500	66,300	60,300	49,700
Estimated visits to ungated sites	141,500	0	5,200	888,100	292,700	179,200
Estimated holiday visitors	148,500	0	216,600	739,600	209,100	173,400
Estimated day trip visitors from home	22,900	0	150,500	59,300	86,300	18,200
Trip expenditure by visitors	£1,854,700	£0	£3,134,200	£9,395,000	£2,697,500	£2,251,400
Day spend by holidaymakers	£249,500	£0	£1,929,500	£606,500	£908,400	£193,700
Day spend by day visitors from home	£2,254,700	£0	£4,048,700	£10,315,800	£3,026,600	£2,550,100
Accommodation spend by holidaymakers	£4,458,900	£0	£9,112,300	£20,317,300	£6,632,400	£4,995,300
Gross expenditure						
Estimated net additionality	8%	0%	23%	12%	9%	13%
Net expenditure by visitors	£353,900	£0	£2,111,600	£2,501,000	£609,900	£667,500

**Devon
Impact of National Trust**

	East Devon		Exeter		Mid Devon		North Devon		Plymouth		South Hams	
	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs
1. National Trust employment												
Wages	£835,007	67	£54,812	3	£290,891	24	£530,044	52	£235,860	25	£280,630	25
2. National Trust Supply Chain												
Construction	£194,535	4	£7,241	0	£59,643	1	£101,666	2	£26,982	1	£48,183	1
Services	£13,716	1	£931	0	£2,947	0	£4,627	0	£5,042	0	£1,558	0
Supplies	£55,802	1	£4,722	0	£20,792	0	£41,068	0	£17,687	0	£26,204	0
Other	£24,830	0	£8,391	0	£13,634	0	£24,603	0	£11,105	0	£16,255	0
Total NT supply chain	£288,883	5	£21,285	0	£97,216	2	£171,954	3	£60,816	1	£92,200	1
3. National Trust Tenant												
Farm tenancies	£7,695	1	£0	0	£13,194	1	£603,145	50	£35,591	3	£1,199,751	100
Business tenancies	£0	0	£0	0	£0	0	£147,000	3	£0	0	£147,000	3
Total NT tenants	£7,695	1	£0	0	£13,194	1	£750,145	53	£35,591	3	£1,346,751	103
4. National Trust Tenant Supply Chain												
Farm tenancies	£6,500	0	£0	0	£11,000	0	£502,500	10	£29,500	1	£1,000,000	20
Business tenancies	£0	0	£0	0	£0	0	£14,500	0	£0	0	£14,500	0
Total NT tenants supply chain	£6,500	0	£0	0	£11,000	0	£517,000	10	£29,500	1	£1,014,500	20
5. External indirect impacts												
Volunteers	£6,035	0	£0	0	£0	0	£59,092	1	£1,428	0	£6,307	0
Holiday cottages	£133,089	3	£0	0	£0	0	£154,746	3	£22,116	0	£98,420	2
Visitors to sites: gross	£4,458,859	112	£0	0	£9,112,347	196	£20,317,336	531	£6,632,425	181	£4,995,308	128
Visitors to sites: net	£353,915	9	£0	0	£2,111,551	45	£2,500,991	65	£609,885	17	£667,524	17
Total gross external impact	£4,597,983	115	£0	0	£9,112,347	196	£20,531,174	535	£6,655,969	181	£5,090,035	130
Total net external impact	£493,039	12	£0	0	£2,111,551	45	£2,714,829	69	£833,429	17	£762,251	19
6. Induced impacts												
Gross induced impact	£573,607	19	£7,610	0	£952,465	22	£2,250,032	65	£701,774	21	£782,412	28
Net induced impact	£163,112	8	£7,610	0	£252,385	7	£468,397	19	£99,520	5	£349,633	17
Total direct, indirect, induced												
Gross	£6,309,674	206	£83,707	3	£10,477,113	246	£24,750,349	719	£7,719,510	231	£8,606,528	308
Net	£1,794,236	92	£83,707	3	£2,776,237	80	£5,152,369	207	£1,094,716	51	£3,845,965	186

**Devon
National Trust assets and visitors**

	Teignbridge	Torday	Torridge	West Devon	Devon
Number of NT Gated sites	2	0	0	5	16
Number of NT Ungated sites	5	1	6	4	52
Number of NT sites with no access	1	1	0	1	7
Tenanted farmland (acres)	339	0	1,215	4,907	21,680
Tenanted business properties	0	0	0	4	11
Number of holiday cottages	1	1	4	2	26
Visits to gated sites	16,100	0	0	281,000	970,100
Estimated visits to ungated sites	53,800	54,900	81,900	74,700	1,772,000
Estimated holiday visitors	48,800	42,400	56,700	245,900	1,882,000
Estimated day trip visitors from home	8,700	3,500	11,900	51,800	413,100
Trip expenditure by visitors	£647,800	£532,900	£712,400	£3,464,600	£24,790,500
Day spend by holidaymakers	£93,200	£35,400	£119,400	£634,800	£4,770,400
Day spend by day visitors from home	£735,800	£576,200	£770,300	£4,344,900	£28,623,100
Accommodation spend by holidaymakers	£1,476,800	£1,144,500	£1,602,100	£8,444,300	£58,183,900
Gross expenditure	8%	7%	32%	28%	16%
Estimated net additionality					
Net expenditure by visitors	£114,400	£75,400	£513,100	£2,375,300	£9,322,100

**Devon
Impact of National Trust**

	Telbridge	Torbay	Torrige	West Devon	Devon	FTE jobs
	Expenditure	Expenditure	Expenditure	Expenditure	Expenditure	FTE jobs
1. National Trust employment						
Wages	£93,990	£0	£44,365	£608,141	£2,973,740	264
2. National Trust Supply Chain						
Construction	£20,937	£0	£17,956	£94,803	£1,431,328	29
Services	£1,312	£0	£2,414	£7,215	£210,987	8
Supplies	£11,683	£0	£6,255	£45,333	£1,295,097	13
Other	£3,548	£0	£3,332	£35,901	£416,707	4
Total NT supply chain	£37,480	£0	£29,957	£183,252	£3,354,119	54
3. National Trust Tenant						
Farm tenancies	£40,942	£0	£155,734	£565,811	£2,621,863	218
Business tenancies	£0	£0	£0	£70,500	£746,500	15
Total NT tenants	£40,942	£0	£155,734	£636,311	£3,368,363	233
4. National Trust Tenant Supply Chain						
Farm tenancies	£34,000	£0	£130,000	£471,500	£2,185,000	44
Business tenancies	£0	£0	£0	£7,000	£75,000	2
Total NT tenants supply chain	£34,000	£0	£130,000	£478,500	£2,260,000	45
5. External indirect impacts						
Volunteers	£2,618	£0	£0	£3,451	£78,931	2
Holiday cottages	£22,116	£22,116	£88,420	£44,210	£575,233	11
Visitors to sites:gross	£1,476,843	£1,144,468	£1,602,134	£8,444,289	£8,184,009	1,459
Visitors to sites:net	£114,357	£75,421	£513,088	£2,375,347	£9,322,079	228
Total gross external impact	£1,501,577	£1,166,584	£1,690,554	£8,491,950	£8,838,173	1,472
Total net external impact	£139,091	£97,537	£601,508	£2,423,008	£9,976,243	240
6. Induced impacts						
Gross induced impact	£170,799	£116,658	£205,061	£1,039,815	£14,158,879	414
Net induced impact	£34,550	£9,754	£96,156	£432,921	£4,386,493	167
Total direct, indirect, induced						
Gross	£1,878,788	£1,283,242	£2,255,671	£11,437,969	£84,953,274	2,482
Net	£380,053	£107,290	£1,057,721	£4,762,133	£26,318,958	1,004

**Dorset
National Trust assets and visitors**

	Bournemouth	Christchurch	North Dorset	Poole	Purbeck	West Dorset	East Dorset	Weymouth & Portland	Dorset
Number of NT Gated sites	0	0	0	1	2	4	1	0	8
Number of NT Ungated sites	0	0	3	0	6	15	2	0	26
Number of NT sites with no access	0	0	0	0	1	2	0	1	4
Tenanted farmland (acres)	0	0	660	0	6,140	3,682	4,837	0	15,329
Tenanted business properties	0	0	0	0	21	2	0	0	23
Number of holiday cottages	0	0	0	1	10	5	0	0	16
Visits to gated sites	0	0	0	89,500	187,900	39,500	91,400	0	408,300
Estimated visits to ungated sites	0	0	12,700	0	1,084,300	377,100	217,000	0	1,691,100
Estimated holiday visitors	0	0	6,600	50,700	831,100	270,600	167,700	0	1,326,700
Estimated day trip visitors from home	0	0	4,100	24,200	233,800	78,100	90,500	0	430,700
Trip expenditure by visitors	£0	£0	£92,500	£735,200	£10,682,400	£3,460,500	£2,202,900	£0	£17,153,500
Day spend by holidaymakers	£0	£0	£41,100	£311,200	£2,444,500	£805,300	£984,000	£0	£4,686,100
Day spend by day visitors from home	£0	£0	£89,200	£951,300	£11,927,900	£3,809,700	£2,534,900	£0	£19,313,000
Accommodation spend by holidaymakers	£0	£0	£212,900	£1,997,600	£25,054,800	£8,065,400	£5,721,800	£0	£41,052,500
Gross expenditure	£0	£0	£212,900	£1,997,600	£25,054,800	£8,065,400	£5,721,800	£0	£41,052,500
Estimated net additionality	0%	0%	16%	30%	38%	25%	14%	0%	31%
Net expenditure by visitors	£0	£0	£34,500	£593,200	£9,413,000	£1,966,400	£765,500	£0	£12,822,600

North Dorset		Poole		Purbeck		West Dorset		Weymouth		Dorset		
FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	
46	£16,020	2	£0	0	£807,160	39	£96,227	12	£0	0	£1,338,537	98
2	£3,590	0	£0	0	£89,389	2	£11,284	0	£0	0	£1,013,012	20
0	£31	0	£0	0	£559	0	£57	0	£0	0	£17,830	1
1	£1,497	0	£0	0	£133,749	1	£8,520	0	£0	0	£679,904	7
0	£67	0	£0	0	£91,507	1	£6,227	0	£0	0	£615,840	6
3	£5,185	0	£0	0	£315,204	4	£26,088	0	£0	0	£2,326,586	34
68	£80,208	7	£0	0	£741,806	62	£445,404	37	£0	0	£2,077,615	173
0	£0	0	£0	0	£4,286,500	86	£356,500	7	£0	0	£4,643,000	93
68	£80,208	7	£0	0	£5,028,306	148	£801,904	44	£0	0	£6,720,615	266
14	£67,000	1	£0	0	£618,000	12	£371,000	7	£0	0	£1,731,000	35
0	£0	0	£0	0	£428,500	9	£35,500	1	£0	0	£464,000	9
14	£67,000	1	£0	0	£1,046,500	21	£406,500	8	£0	0	£2,195,000	44
0	£0	0	£0	0	£0	0	£0	0	£0	0	£0	0
0	£0	0	£24,162	0	£241,556	5	£120,789	2	£0	0	£386,507	7
137	£212,894	5	£1,997,630	47	£25,054,773	632	£8,065,445	205	£0	0	£41,052,518	1,027
19	£34,546	1	£593,175	14	£9,412,966	237	£1,996,416	51	£0	0	£12,822,603	322
137	£212,894	5	£2,021,792	48	£25,296,329	636	£8,186,234	207	£0	0	£41,439,025	1,034
19	£34,546	1	£617,337	15	£9,654,522	242	£2,117,205	53	£0	0	£13,209,110	329
27	£36,331	1	£202,179	5	£3,249,350	85	£951,695	27	£0	0	£10,803,953	295
15	£20,496	1	£61,734	1	£1,685,169	45	£344,792	12	£0	0	£5,157,970	154
294	£421,638	16	£2,223,971	53	£36,742,849	932	£10,468,648	299	£0	0	£64,823,715	1,770
164	£225,455	12	£679,071	16	£18,536,861	498	£3,792,716	129	£0	0	£30,947,818	925

**Gloucestershire
National Trust assets and visitors**

	Cheltenham	Cotswold	Forest of Dean	Gloucester	Stroud	Tewkesbury	Gloucestershire
Number of NT Gated sites	0	3	0	0	1	3	7
Number of NT Ungated sites	0	7	3	0	14	1	25
Number of NT sites with no access	0	1	0	0	3	0	4
Tenanted farmland (acres)	0	4,591	107	0	315	16	5,029
Tenanted business properties	0	3	0	0	1	0	4
Number of holiday cottages	0	0	0	0	0	5	5
Visits to gated sites	0	184,000	0	0	3,900	119,600	307,500
Estimated visits to ungated sites	0	240,800	30,900	0	51,800	3,000	326,500
Estimated holiday visitors	0	183,900	12,300	0	20,100	49,500	275,800
Estimated day trip visitors from home	0	161,600	13,500	0	26,500	53,100	254,700
Trip expenditure by visitors	£0	£2,589,100	£155,100	£0	£255,300	£715,100	£3,724,600
Day spend by holidaymakers	£0	£1,819,500	£135,600	£0	£271,200	£878,100	£2,904,400
Day spend by day visitors from home	£0	£3,069,100	£167,700	£0	£280,400	£922,100	£4,438,300
Accommodation spend by holidaymakers	£0	£7,487,600	£458,500	£0	£806,900	£2,315,400	£11,068,400
Gross expenditure	£0	£7,487,600	£458,500	£0	£806,900	£2,315,400	£11,068,400
Estimated net additionality	0%	30%	12%	0%	6%	21%	26%
Net expenditure by visitors	£0	£2,274,800	£54,100	£0	£46,600	£486,700	£2,862,200

**Gloucestershire
Impact of National Trust**

	Cotswold		Forest of Dean		Stroud		Tewkesbury		Gloucestershire	
	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs	Expenditure	FTE jobs
1. National Trust employment										
Wages	£1,729,730	100	£27,350	2	£20,060	3	£877,430	53	£2,654,570	158
2. National Trust Supply Chain										
Construction	£113,399	2	£1,552	0	£20,086	0	£17,293	0	£426,624	9
Services	£235,261	9	£959	0	£4,686	0	£76,411	3	£340,311	14
Supplies	£220,702	2	£475	0	£3,668	0	£62,553	1	£369,783	4
Other	£130,873	1	£285	0	£863	0	£73,888	1	£216,517	2
Total NT supply chain	£700,235	15	£3,271	0	£29,303	1	£230,145	5	£1,353,235	28
3. National Trust Tenant										
Farm tenancies	£518,195	43	£12,873	1	£47,186	4	£1,933	0	£580,187	48
Business tenancies	£861,750	17	£0	0	£2,000	0	£0	0	£863,750	17
Total NT tenants	£1,379,945	60	£12,873	1	£49,186	4	£1,933	0	£1,443,937	66
4. National Trust Tenant Supply Chain										
Farm tenancies	£432,000	9	£10,500	0	£39,500	1	£1,500	0	£483,500	10
Business tenancies	£86,000	2	£0	0	£0	0	£0	0	£86,000	2
Total NT tenants supply chain	£518,000	10	£10,500	0	£39,500	1	£1,500	0	£569,500	11
5. External indirect impacts										
Volunteers	£221	0	£0	0	£663	0	£0	0	£884	0
Holiday cottages	£0	0	£0	0	£0	0	£138,009	3	£138,009	3
Visitors to sites: gross	£7,487,645	170	£458,469	11	£906,866	19	£2,315,382	47	£11,068,362	247
Visitors to sites: net	£2,274,766	52	£54,117	1	£46,579	1	£486,744	10	£2,862,206	64
Total gross external impact	£7,487,866	170	£488,469	11	£907,529	19	£2,453,391	50	£11,207,255	250
Total net external impact	£2,274,987	52	£54,117	1	£47,242	1	£624,753	12	£3,001,099	67
6. Induced impacts										
Gross induced impact	£1,181,578	36	£51,246	1	£94,558	3	£356,440	11	£3,445,699	102
Net induced impact	£660,290	24	£10,811	0	£18,529	1	£173,576	7	£1,804,468	66
Total direct, indirect, induced										
Gross	£12,987,354	392	£563,709	16	£1,040,136	29	£3,920,839	119	£20,674,197	615
Net	£7,263,187	262	£118,922	5	£203,820	10	£1,909,337	78	£10,826,809	395

**Somerset
National Trust assets and visitors**

	Mendip	Sedgemoor	South Somerset	Taunton Deane	West Somerset	Somerset
Number of NT Gated sites	1	2	6	0	2	11
Number of NT Ungated sites	3	5	2	1	5	16
Number of NT sites with no access	0	0	0	0	0	0
Tenanted farmland (acres)	1,066	830	727	9	8,746	11,378
Tenanted business properties	0	0	0	0	19	19
Number of holiday cottages	0	0	0	0	0	0
Visits to gated sites	11,300	11,400	189,400	0	146,200	358,300
Estimated visits to ungated sites	131,900	197,100	12,000	10,800	689,800	1,041,600
Estimated holiday visitors	86,000	130,700	91,900	5,500	583,800	897,900
Estimated day trip visitors from home	33,800	43,800	76,800	3,500	115,900	273,800
Trip expenditure by visitors	£1,093,900	£1,656,900	£1,320,700	£68,800	£7,534,700	£11,675,000
Day spend by holidaymakers	£346,900	£446,100	£973,600	£36,500	£1,220,600	£3,022,700
Day spend by day visitors from home	£1,203,500	£1,813,300	£1,694,300	£74,300	£8,461,000	£13,246,400
Accommodation spend by holidaymakers	£2,644,200	£3,916,300	£3,988,700	£178,600	£17,216,300	£27,944,100
Gross expenditure						
Estimated net additionality	35%	26%	21%	15%	40%	35%
Net expenditure by visitors	£929,300	£1,033,500	£633,100	£26,000	£6,892,200	£9,714,100

**Somerset
Impact of National Trust**

	Mendip	Seedgemoor	South Somerset	Taunton Deane	West Somerset	Somerset	FTE jobs	Expenditure
1. National Trust employment								
Wages	£78,129	£25,500	£419,820	£0	£347,650	£871,099	63	
2. National Trust Supply Chain								
Construction	£5,806	£4,321	£45,475	£0	£46,831	£504,227	10	
Services	£1	£96	£985	£0	£787	£24,827	1	
Supplies	£10,033	£2,206	£44,939	£0	£31,762	£264,064	3	
Other	£514	£118	£28,404	£0	£9,001	£191,179	2	
Total NT supply chain	£16,354	£6,701	£119,813	£0	£88,481	£984,297	16	
3. National Trust Tenant								
Farm tenancies	£128,624	£92,391	£76,486	£1,099	£865,604	£1,164,204	97	
Business tenancies	£0	£0	£0	£0	£757,500	£757,500	15	
Total NT tenants	£128,624	£92,391	£76,486	£1,099	£1,623,104	£1,921,704	112	
4. National Trust Tenant Supply Chain								
Farm tenancies	£107,000	£77,000	£63,500	£1,000	£721,500	£970,000	19	
Business tenancies	£0	£0	£0	£0	£76,000	£76,000	2	
Total NT tenants supply chain	£107,000	£77,000	£63,500	£1,000	£797,500	£1,046,000	21	
5. External indirect impacts								
Volunteers	£0	£0	£0	£0	£3,366	£3,366	0	
Holiday cottages	£0	£0	£0	£0	£0	£0	0	
Visitors to sites: gross	£2,644,242	£3,916,254	£3,988,707	£178,605	£17,216,291	£27,944,099	699	
Visitors to sites: net	£929,300	£1,033,467	£833,052	£25,986	£6,892,249	£9,714,054	245	
Total gross external impact	£2,644,242	£3,916,254	£3,988,707	£178,605	£17,219,657	£27,947,465	699	
Total net external impact	£929,300	£1,033,467	£833,052	£25,986	£6,895,615	£9,717,420	245	
6. Induced impacts								
Gross induced impact	£297,435	£411,785	£466,833	£18,070	£2,007,639	£6,554,113	182	
Net induced impact	£125,941	£123,506	£151,267	£2,809	£975,235	£2,908,104	91	
Total direct, indirect, induced								
Gross	£3,271,784	£4,529,630	£5,135,159	£198,774	£22,084,031	£39,324,678	1093	
Net	£1,385,347	£1,358,565	£1,663,938	£30,894	£10,727,585	£17,448,624	548	

**Wiltshire
National Trust assets and visitors**

	Kennet	North Wiltshire	Salisbury	Swindon	West Wiltshire	Wiltshire
Number of NT Gated sites	2	0	4	0	4	10
Number of NT Ungated sites	3	2	6	1	1	13
Number of NT sites with no access	0	1	0	0	0	1
Tenanted farmland (acres)	3,840	465	3,714	79	776	8,874
Tenanted business properties	0	3	6	0	0	9
Number of holiday cottages	0	0	0	0	0	0
Visits to gated sites	61,700	0	294,700	0	83,800	440,200
Estimated visits to ungated sites	300,400	87,300	132,500	3,400	15,900	539,500
Estimated holiday visitors	158,000	36,900	189,400	1,300	40,900	426,500
Estimated day trip visitors from home	145,100	36,200	168,100	1,600	42,500	393,500
Trip expenditure by visitors	£2,037,200	£463,400	£2,632,100	£16,600	£580,300	£5,729,600
Day spend by holidaymakers	£1,526,400	£363,600	£2,013,400	£15,600	£527,500	£4,446,500
Day spend by day visitors from home	£2,285,600	£501,000	£3,248,700	£18,000	£733,500	£6,786,800
Accommodation spend by holidaymakers	£5,849,200	£1,327,900	£7,894,200	£50,100	£1,841,300	£16,962,700
Gross expenditure						
Estimated net additionality	33%	30%	9%	2%	16%	20%
Net expenditure by visitors	£1,933,300	£392,200	£746,400	£800	£296,200	£3,368,900

**Wiltshire
Impact of National Trust**

	Kennet	North Wiltshire	Salisbury	Swindon	West Wiltshire	Wiltshire	FTE jobs	Expenditure
1. National Trust employment								
Wages	£193,490	£154,970	£485,879	£0	£4,243,918	£5,028,257	274	
2. National Trust Supply Chain								
Construction	£50,508	£41,688	£92,605	£0	£32,551	£1,066,291	21	
Services	£127	£515	£908	£0	£37,984	£877,748	36	
Supplies	£20,343	£19,180	£50,191	£0	£540,769	£1,309,889	13	
Other	£4,793	£6,628	£14,428	£0	£619,565	£1,316,627	13	
Total NT supply chain	£75,771	£68,011	£158,132	£0	£1,230,879	£4,570,555	83	
3. National Trust Tenant								
Farm tenancies	£512,878	£52,696	£463,136	£9,587	£91,309	£1,129,606	94	
Business tenancies	£0	£292,500	£2,725,500	£0	£0	£3,018,000	60	
Total NT tenants	£512,878	£345,196	£3,188,636	£9,587	£91,309	£4,147,606	154	
4. National Trust Tenant Supply Chain								
Farm tenancies	£427,500	£44,000	£386,000	£8,000	£76,000	£941,500	19	
Business tenancies	£0	£29,500	£272,500	£0	£0	£302,000	6	
Total NT tenants supply chain	£427,500	£73,500	£658,500	£8,000	£76,000	£1,243,500	25	
5. External indirect impacts								
Volunteers	£0	£0	£12,393	£0	£0	£12,393	0	
Holiday cottages	£0	£0	£0	£0	£0	£0	0	
Visitors to sites: gross	£5,849,247	£1,327,948	£7,894,214	£50,139	£1,841,254	£16,962,801	405	
Visitors to sites: net	£1,933,264	£392,164	£746,445	£819	£296,198	£3,368,890	81	
Total gross external impact	£5,849,247	£1,327,948	£7,906,607	£50,139	£1,841,254	£16,975,194	405	
Total net external impact	£1,933,264	£392,164	£758,838	£819	£296,198	£3,381,283	81	
6. Induced impacts								
Gross induced impact	£705,889	£196,962	£1,234,775	£6,773	£748,336	£6,383,022	188	
Net induced impact	£314,290	£103,384	£519,959	£1,841	£593,830	£3,674,240	123	
Total direct, indirect, induced								
Gross	£7,764,774	£2,166,587	£13,582,530	£74,488	£8,231,696	£38,388,135	1,129	
Net	£3,457,194	£1,137,225	£5,719,984	£20,246	£6,532,135	£22,045,441	740	

**South West
National Trust assets and visitors**

	Avon	Cornwall	Devon	Dorset	Gloucestershire	Somerset	Wiltshire	South West
Number of NT Gated sites	6	13	16	8	7	11	10	71
Number of NT Ungated sites	12	67	52	26	25	16	13	211
Number of NT sites with no access	2	4	7	4	4	0	1	22
Tenanted farmland (acres)	1,158	9,834	21,680	15,329	5,029	11,378	8,874	73,282
Tenanted business properties	0	18	11	23	4	19	9	84
Number of holiday cottages	0	85	26	16	5	0	0	132
Visits to gated sites	382,600	843,600	970,100	406,300	307,500	356,300	440,200	3,710,600
Estimated visits to ungated sites	664,300	3,037,500	1,772,000	1,691,100	326,500	1,041,600	539,500	9,072,500
Estimated holiday visitors	1,046,900	3,881,100	2,742,100	2,099,400	634,000	1,399,900	979,700	12,783,100
Estimated day trip visitors from home	492,300	2,887,800	1,862,000	1,326,700	275,800	897,900	426,500	8,189,000
Trip expenditure by visitors	395,500	360,600	413,100	430,700	254,700	273,800	393,500	2,521,900
Day spend by holidaymakers	66,537,000	£37,511,200	£24,790,500	£17,153,500	£3,724,600	£11,675,000	£5,729,600	£107,121,400
Day spend by day visitors from home	£4,362,000	£3,828,900	£4,770,400	£4,686,100	£2,904,400	£3,022,700	£4,446,500	£27,921,000
Accommodation spend by holidaymakers	£7,625,900	£42,503,300	£28,623,100	£19,313,000	£4,439,300	£13,246,400	£6,786,800	£122,537,800
Gross expenditure	£18,525,000	£83,943,400	£58,183,900	£41,052,500	£11,068,400	£27,944,100	£16,962,700	£257,580,000
Estimated net additionality	12%	29%	16%	31%	26%	35%	20%	25%
Net expenditure by visitors	£2,208,700	£24,058,700	£9,322,100	£12,822,600	£2,862,200	£9,714,100	£3,368,900	£64,357,300

**South West
Impact of National Trust**

	Avon	Cornwall	Devon	Dorset	Gloucestershire	Somerset	Wiltshire	South West	FTE jobs	Expenditure
1. National Trust employment										
Wages	£311,840	£3,246,193	£2,973,740	£1,338,537	£2,654,570	£871,099	£5,028,257	£16,424,236	274	1,156
2. National Trust Supply Chain										
Construction	£294,904	£2,082,932	£1,431,328	£1,013,012	£426,624	£504,227	£1,066,291	£6,819,318	21	136
Services	£11,238	£248,214	£210,987	£17,830	£340,311	£24,827	£877,748	£1,731,155	35	69
Supplies	£90,412	£963,128	£1,295,097	£369,904	£369,783	£284,064	£1,309,889	£4,972,277	13	50
Other	£73,061	£117,640	£416,707	£615,840	£216,517	£191,179	£1,316,627	£2,947,571	13	29
Total NT supply chain	£469,615	£3,411,914	£3,354,119	£2,326,586	£1,353,235	£984,297	£4,570,555	£16,470,321	83	325
3. National Trust Tenant										
Farm tenancies	£148,635	£1,238,395	£2,621,863	£2,077,615	£580,187	£1,164,204	£1,129,608	£8,960,505	94	747
Business tenancies	£0	£805,750	£746,500	£464,000	£863,750	£757,500	£3,018,000	£10,834,500	60	217
Total NT tenants	£148,635	£2,044,145	£3,368,363	£6,720,615	£286,144,937	£1,921,704	£4,147,606	£19,795,005	154	963
4. National Trust Tenant Supply Chain										
Farm tenancies	£124,000	£1,032,000	£2,185,000	£1,731,000	£483,500	£970,000	£941,500	£7,467,000	19	149
Business tenancies	£0	£81,000	£75,000	£464,000	£86,000	£76,000	£302,000	£1,084,000	6	22
Total NT tenants supply chain	£124,000	£1,113,000	£2,260,000	£2,195,000	£569,500	£1,046,000	£1,243,500	£8,551,000	25	171
5. External indirect impacts										
Volunteers	£0	£20,162	£78,931	£0	£884	£3,366	£12,393	£115,736	0	2
Holiday cottages	£0	£1,833,614	£575,233	£386,507	£138,009	£0	£0	£2,933,363	0	56
Visitors to sites: gross	£18,524,959	£90,885,456	2,112,588,184,009	1,459,441,052,518	1,027,110,688,362	247,227,944,099	699,16,962,801	£254,622,204	405	6,421
Visitors to sites: net	£2,208,725	£24,056,306	£9,322,079	£12,822,603	£2,862,206	£9,714,054	£3,368,890	£64,354,862	81	1,614
Total gross external impact	£18,524,959	£92,739,232	2,148,588,838,173	1,472,441,439,025	1,034,111,207,255	250,227,947,465	699,16,975,194	£257,671,303	405	6,479
Total net external impact	£2,208,725	£24,554,151	£9,976,243	£13,209,110	£3,001,099	£9,717,420	£3,381,283	£66,048,029	81	1,645
6. Induced impacts										
Gross induced impact	£3,915,810	£18,510,897	£14,156,879	£10,803,953	£3,445,699	£6,554,113	£6,395,022	£63,782,373	188	1,811
Net induced impact	£652,563	£6,873,881	£4,386,493	£5,157,970	£1,804,468	£2,908,104	£3,674,240	£25,457,718	123	844
Total direct, indirect, induced										
Gross	£23,494,859	£111,065,381	£84,953,274	£64,823,715	£20,674,197	£39,324,678	£38,358,135	£382,694,238	1,129	10,866
Net	£3,915,378	£41,243,283	£26,318,958	£30,947,818	£10,826,809	£17,448,624	£22,046,441	£152,746,310	740	5,064