

**Tourism**

**LDF Background Paper No22**

**August 2007**

## Foreword

The Tourism Background Paper is part of the Council's evolving Evidence Base which is informing the development of the Havant Local Plan and Other Planning Policy Documents. The Council Evidence Base is a comprehensive collection of information that is being used to assess the development options that are available. This paper provides background information to the tourism policies in the Council's Core Strategy and subsequent development plan documents which are relevant for tourism.

## Contents

	Page
Introduction	4
Background	5
Strategies and Policies	13
Conclusions	16
References	18

## 1.0 Introduction

1.1 Tourism is vital to the national economy. It generates significant numbers of jobs, impacts on local communities, provides a lifeline to large numbers of businesses and is a powerful tool for regeneration. It contributes £74 billion to GDP (Gross Domestic Product), employing over 2 million people making it the sixth biggest employer in the UK. [3]

1.2 The South East Region of England comprises the largest tourism market in the UK outside of Greater London, due to the diversity of its region's environment and its geographical locations as the gateway to the UK and its proximity to London. More than £10 billion a year is contributed to the South East economy, equivalent to 8% of regional GDP and provides employment for more than 225,000 people. [16]

1.3 Tourism is worth around £750million to the Hampshire economy and 37,000 jobs are directly or indirectly supported by tourism (representing 4% of the workforce). Day visitors spend a further £690million, mainly in visitor attractions and in the retail sector. [14]

1.4 Within the borough of Havant tourism is an important income and generating activity. In 2004 the annual turnover for Havant tourism exceeded £160million and supported around 3,400 jobs in the borough. A further £42million of business turnover is generated through indirect and induced spending [15].

1.5 This background paper brings together and summarises the research and background information on tourism for the borough. The first part reviews the background material (see references at the end of this document) such as Tourism South East surveys on visitor satisfaction and hotel potential. The second part reviews the existing policy context and advice within which LDF policies on tourism would sit

## 2.0 Background

### The Volume and Value of Tourism to Havant

2.1 A study of Havant's tourism economy was carried out in 2004 by Tourism South East as part of a wider study across the whole of Hampshire [15]. Its aim was to provide indicative estimates for the volume, value and resultant economic impact of tourism across the county and districts. A summary of the findings is discussed below.

2.2 Around 350,000 overnight staying trips were made in the borough, representing 8% of the total volume of trips made in Hampshire. The most popular choice of accommodation among UK visitors were caravan and camping accommodation and among overseas visitors were hotels, guesthouses and B&Bs. Visits by UK visitors were mainly holiday based (70%), followed by visiting friends and family (20%). For overseas visitors business trips were significant.

2.3 Compared to the rest of Hampshire, Havant has the 5<sup>th</sup> largest number of staying trips in the County. Non-serviced accommodations (which include self catering houses, cottage and flats, static and touring caravans and camping) were commonly used in Havant and the New Forest. Staying trips generated £54million, the 4<sup>th</sup> highest expenditure across all districts in Hampshire. This is mainly due to the spend by visitors in static caravans who contributed to 21% of Havant's total expenditure.

2.4 There were just over 1.9 million day trips to Havant in 2004, representing 6% of the Hampshire total, generating an estimated expenditure of £62million. In comparison with other districts in Hampshire, Havant receives significantly less day trips.

2.5 Additional turnover is also created for local businesses. Of the visitor spend on trips to Havant, around £109million directly benefited local businesses in the borough. In addition around £42million indirectly benefited local businesses through servicing and supplying. Expenditure by friends and family, and visitors with a second home in the borough accounted for an extra £9.5million. In total the value of tourism spend in Havant in 2004 is estimated to have been just under £161million.

2.6 The Hampshire Tourism Trends Survey 1999-2004 recorded visits to a number of attractions in the borough. This survey showed that for Havant 82,432 visits were made to attractions in 2004, up 4% on 2003 and an increase on the 1999 levels (76,427). These statistics reflect the low level of major tourist-related development having taken place in recent years, apart from the modernisation and refurbishment works at the holiday centres on Hayling Island.

### Visitor Satisfaction

2.7 Tourism South East ( TSE ) undertook a visitor survey during the summer of 2005 [11]. It was the sixth survey of its kind to have been carried out in Havant borough, previous surveys having been carried out in 1980, 1985, 1990, 1995, and 2000. A SWOT analysis of Havant's tourism offer by a local tourism academic was undertaken in 2006 [1]. Both studies asked people to provide their opinion on what they considered to be the strengths and weaknesses of Havant for the visitor and

where improvements could be made. The TSE study also provided useful information on defining the types of visitors and where they tend to stay.

### **TSE Visitor Survey**

2.8 The survey was undertaken by the means of a questionnaire by visitors in Hayling Island, Langstone and Emsworth. The survey results are summarised below.

#### **Profile of visitors to Havant Borough**

2.9 The majority of visitors to Havant borough were day visitors, which had increased compared with previous surveys. The proportion of staying visitors though had decreased. People interviewed on Hayling Island were more likely to be staying visitors compared to those interviewed on the mainland.

2.10 There were fewer family groups with children encountered and a higher proportion of adult only groups compared with the previous survey. There were significant differences in the groups surveyed on Hayling Island compared to those surveyed on the mainland. Over half of the groups interviewed on Hayling Island had at least one child, while only a quarter of groups on the mainland had at least one child. Overall, groups surveyed in previous years included a significantly higher proportion of children. Significantly only a third of all people represented on Hayling Island were children compared with nearly two thirds in the previous study in 2000. Day visitor groups from home were more likely to include children.

2.11 In terms of age 43% of all adult visitors were aged 55+ with a further 40% aged between 35-55. Visitor groups on Hayling Island reflected a slightly younger age profile than those surveyed on the mainland. 55% of adults on the mainland were over 55 compared to only 37% on Hayling Island.

2.12 Of the visitors staying in the borough, a quarter were staying with friends or family, and a quarter in their own static caravans. The number of people staying in a holiday centre was relatively low (12%) compared to previous surveys (20% and 16%).

#### **Characteristics of visitors stay in Havant Borough**

2.13 89% of visitors interviewed considered their visit to be for leisure or holiday purposes with 10% to visit friends and family. There seemed to be a trend towards an increase in short breaks (1-3 nights) in Havant borough, with longer stays decreasing. The average length of stay varied according to accommodation type. Those with their own static caravan stayed for average 11 nights whereas the average stay in a hotel was 2.5 nights. The majority of visitors travelled to Havant by a motor vehicle (89%). Very few visitors had used public transport (3%), and the remainder had travelled by foot, bicycle or on a coach tour (8%).

2.14 40% of respondents said they would be or had already visited an attraction in Havant borough. Hayling Amusement Park was the most frequently mentioned attraction (68%), followed by Staunton Country Park (14%). Other attractions mentioned were the beach, the railway, car boot sales and Hayling Nature Reserves. 36% of visitors overall said they would be or had already visited attractions outside the borough. These included Portsmouth/Southsea, Chichester and Southampton.

2.15 The most common leisure facilities that visitors used were restaurants, shops, funfair, amusement and seafront. Other activities mentioned were using the beach, walking, visiting pubs and cycling.

2.16 The highest spend group (by person/day) were visitors staying in holiday centres (£39.90) followed closely by those staying in hotels (£37.52). The lowest spending groups were those staying with friends and family (£9.08) and those who had second homes or owned static caravans (£12.31).

### **Opinions of Havant Borough**

2.17 Visitors were asked what they liked the most about Havant Borough. The following reasons were put forward:

From visitors interviewed on Hayling Island:

- Peaceful/ quiet / tranquil
- Relaxing / laid back
- Uncrowded / not commercialised
- The sea / waterfront
- Accessible /convenient
- Scenery/ surroundings / open space
- The beach
- Friendly/ welcoming / nice ambience
- Clean
- Plenty of car parking

From visitors interviewed on Emsworth/Langstone:

- The sea/ waterfront/ harbour
- Scenery /surroundings/ open spaces
- Quaint/ historic town/ village feel
- Uncrowded/ not commercialised
- Friendly/ welcoming /nice ambience
- Walks
- Relaxing/ laid back
- Boats/ watching boats
- Pubs/ restaurants/ cafes
- Wildlife/ birds

2.18 Visitors interviewed on Hayling Island were also asked what their impression they had of the area and what improvements could be made. Of those suggested the most frequent ones were:

- Replacing the shingle on the beach with sand
- Generally updating and smartening up the area
- Free or cheaper car parking
- Keeping public toilets open longer
- More restaurants and or food outlets near the beach
- More child friendly facilities
- More seating on seafront

2.19 1% of visitors interviewed said they were unlikely to recommend Havant borough as a tourist destination for the following reasons: need for more facilities and things for young people to do; not enough for a family to do; it is not a holiday place anymore; and lack of investment.

#### SWOT Analysis of Havant's tourism

2.20 The SWOT analysis study was undertaken by a local tourism academic to identify the range of challenges and opportunities that exist in Havant borough. The research methods used were a limited number of questionnaires and four focus groups. The research does not state whether all those who answered questionnaires had visited Havant borough, however the focus groups contained a mixture of local residents, students and lecturers at South Downs College and a group of her peer travel and tourism students at Brighton University.

2.21 From the limited sample groups responding to the questionnaire, 94% considered Havant borough to be a worthwhile area for a day trip but not really for a holiday. The remaining 6% considered it was not a worthwhile place for either a day trip or a holiday. This is quite a significant response but must be viewed along with the limitations of those groups surveyed.

2.22 The focus groups were asked what they considered the strengths and weaknesses of the borough were and also some suggestions for improvements.

The strengths they identified were:

- Hayling beach and Langstone Harbour are attractive
- Emsworth and Langstone very appealing to tourists
- Excellent restaurants in Emsworth area
- Scenic views
- Sailing facilities
- Proximity to sea and airports
- Attractive coastline
- Sailing centres
- Varied offering – e.g. coastal, heritage, rural, parks, market towns.
- Leisure pursuits – e.g. bird watching, walking, sailing, cycling.

The weaknesses they identified were:

- Not a lot for young people to do
- Hayling funfair needs updating
- Better public transport around the borough
- Shopping in Waterlooville is limited
- Not enough places of interest to sustain a holiday
- Lack of investment in e.g. Hayling Billy Line, Hayling funfair area, hotels and other visitor accommodation
- Lack of facilities e.g. ice rink, mini golf course, dry ski slope, open air theatre
- Lack of distinctive visitor attractions
- Lack of quality hotels
- Confusion as to what actually constitutes the borough

Some of the suggestions for improving tourism in Havant Borough were:



- Main area of focus should be Hayling Island area
- Could exploit business traveller market
- More to do/ more attractions
- More cafes/bars
- More street cleaners
- More plants and grassy areas
- General regeneration of the area

Conclusions from visitor survey and SWOT analysis.

2.23 From these two surveys some common themes can be pulled together. The most common visitors to Havant borough were day trippers which seems to link into people's perception that Havant is a worthwhile place for the day but not for an extended stay.

2.24 Visitors on Hayling Island were more likely to be staying visitors and be family groups with children. Those on the mainland at Emsworth and Langstone were more likely to be day visitors and adult only groups. This reflects the fact that most of the borough's holiday accommodation stock is located on Hayling Island and that attractions such as the beach and amusement park are more attractive to families and that the historic towns are more appealing to adults.

2.25 The trend seems to be for shorter breaks in Havant and visitors arriving by their own transport. Very little use is made of public transport despite Havant having a mainline railway and a bus station interchange. This could be due to the fact that there are limited services to holiday destinations such as Emsworth and Hayling Island. This also reflects the established trend nationally of using the private car for holiday travel in the UK.

2.26 The strengths of Havant indicated were its water frontage and its scenery and open spaces, and also its varied offering e.g. coastal resorts, market towns, bird watching, sailing, walking etc. People also commented on the uncrowded, peaceful and non commercialised nature of Hayling Island, Emsworth and Langstone being positive aspects of the area. The weaknesses of Havant identified were the lack of investment in tourism facilities and visitor attractions e.g. Hayling funfair needs updating and not enough for young people to do. Improvements suggested tended to include more investment and more focus being on Hayling Island, providing more food and drink outlets and improving public spaces.

## Residents' Perspective

2.27 In October 2006 Havant Borough Council circulated a consultation survey to its Citizen's Panel which asked the local residents of Havant what direction tourism should take in the borough [4]. The results set out below contributed to the Havant borough wide Tourism and Leisure Plan.

2.28 The results showed that the most popular places to visit were Emsworth Harbour /Mill pond, Hayling Beach, Staunton Country Park, town centres and wildlife areas. Reasons why people visited these places were for leisure, walking, shopping and to visit the beach.

2.29 The places residents took their visitors to most of the time were Chichester, Emsworth, Hayling Island, Portsmouth Harbour and the South Downs.

2.30 The residents were also asked how attractive they thought the borough's shopping areas were. Emsworth was seen as the most attractive centre with Waterlooville. Unattractive centres were Hayling Island and Havant.

2.31 They were also asked what they thought attracted visitors to the borough. The answers included Emsworth Food Festival; the location by the coast, the diversity of things to do; wildlife and open spaces; bird watching; easy access to the countryside and also the sea. They were also asked what new or additional attractions would attract visitors to the borough. These included better shops; ice rink; swimming pool; cinema; wildlife reserves; trips around the harbour; visitors centre at Broadmarsh; designated walks; and extending Hayling Light Railway.

## Hotel Development

2.32 A Hampshire Hotel Trends survey was carried out in 2005 by Tourism South East [9], which reviewed the performance of hotels and assessed the market potential for hotel development, with the following results

### 2.33 Hotel Supply

There are a total of 7 hotels in the borough: 1 four star hotel, 3 three star hotels, 1 two star and 2 budget hotels, with a total of 541 bedrooms, almost half of which are accounted for by the Sinah Warren Character hotel.

Hotel	Grading	Rooms
Langstone, Hayling Island	4 Star	103
Sinah Warren	3 Star	258
The Bear, Havant	3 Star	42
Brookfield, Emsworth	3 Star	40
Newtown House, Hayling Island	2 Star	26
Premier Travel Inn, Havant	Budget	36
Travelodge Chichester, Emsworth	Budget	36

### 2.34 Hotel Demand

The average annual room occupancy for 3 and 4 star hotels was 67% in 2004 (excluding the Sinah Warren Character Hotel) compared with 86% for budget hotels. 3 and 4 star hotels achieve weekday occupancies of 80%+ although weekend occupancies are around 45-50%. Budget hotels achieve very high occupancies during the week of 90-100% and regularly turn away mid week business, and have strong weekend business with occupancies of 70-100%, usually filling at weekends in the summer months.

### 2.35 Hotel Opportunities

Based on current performance the types of hotel development that could potentially be marketed in Havant are upper tier budget and 3 star hotels, probably near to the A27 corridor. This would help meet the demand from business travel.

2.36 Following this survey in 2005, a second has been completed, called Hampshire Hotel futures – a site assessment, developer testing and issues paper [10], which has incorporated the testing of investment interest with hotel developers with work to identify and assess sites for hotel development. There were two strands to the work. The first looked at the identification and assessment of sites through consultations with local authorities. The issues that came out were a lack of a 'joined

up approach' within authorities. Some officers were not aware of previous Hotel Futures work or other advice or guidance issued by TSE . There was also little evidence of willingness currently to allocate sites for hotel use. Other priorities, like industrial/ commercial or affordable housing development, were higher up the political agenda and the fact that hotels are seen as primarily a town centre use (although regional guidance does allow for development outside where it relates to a particular demand).

2.37 A sample of representatives of hotel chains was interviewed as a basis for establishing hotel developer interest in Hampshire, with reference to the location, size and standard of hotel they would seek to develop and what obstacles they saw to development in Hampshire. The results were a broad match to the market potential in the hotel trends survey.

For Havant the following interest was received:

3 Star – Village and Courtyard\*

Upper tier budget – Bropar

Budget – Days Inn

\*possible interest – unclear about potential and/or insufficient knowledge of destination.

2.38 Good practice lessons that emerged from this work included the benefit for local authorities to have an evidence base of hotel performance and need, to tackle site allocation issues and prioritise hotel needs and to plan positively for hotels by thinking through the policy implications of research to ensure they are reflected in the Local Development Framework.

## Traffic and Access

2.39 Havant borough is well located on the Strategic Road Network, with the A27 and A3(M) running through the borough. Most of the borough is easily accessible from this network. The borough's main tourist resort of Hayling Island can only be accessed by vehicles from one road bridge on the north of the island, with additional pedestrian and cycle access via the ferry from Eastney in Portsmouth. Further development on Hayling Island whether for tourism development or other development will add pressure to the existing road network. Issues of traffic and access to the island's resorts will have to be considered in more detail and will very much depend on the level of development likely to be allocated on Hayling Island in the local development framework.

## Nature Conservation Sites

2.40 Havant Borough has a rich and varied landscape and there are a number of designated nature conservation sites of significant importance. There are Sites of Special Scientific Interest ( SSSI ) at Langstone Harbour, Chichester Harbour, Warblington Meadow and Sinah Common which comprise of fragile habitats. Mitigation for development by enhancement or restoration is a requirement under the Countryside and Rights of Way Act 2000 for these sites. Most of the SSSIs are also some or all of the following; Ramsar sites, Special Protection Area ( SPA ) and Special Area of Conservation ( SAC ), which are international habitat designations

2.41 There are also numerous Sites of Importance for Nature Conservation (SINC) throughout the Borough and four Local Nature Reserves (LNR) at Gutner Point, The Kench, Sandy Point and West Hayling.

2.42 Any tourism development, or recreation activity such as walking, cycling near or within these areas could have significant impact on the environmental quality. A balance between safeguarding the nature conservation value of such sites and allowing them to be used for leisure and tourist purposes needs to be struck, although the impact on the international designations is an overriding consideration.

### **Caravan and Camping Sites**

2.43 All static caravan sites in the borough are on Hayling Island, mainly in the Eastoke area. There are also 700 touring camping and caravan pitches on 4 larger sites on Hayling Island.

2.44 There is an issue with the majority of the caravan sites being within the coastal flood zone and adjacent to designated nature conservation sites. Any improvements or development within the caravan and camping sites would have to be assessed against the likely implications for the nature conservation sites and risk of flooding. The issues of flooding and coastal erosion will become a more relevant issue in future. The Council are currently undertaking a Strategic Flood Risk Assessment for the whole of the borough which will indicate the areas of the borough most at risk from flooding in future. There may be a point in the future when some of the caravan sites on Hayling Island may have to be relocated away from the high risk flood zone. The designated nature conservation sites around Hayling Island limit where alternative sites could be located.

### **Local Businesses**

2.45 During 2006 a business needs survey was carried out on Hayling Island [7]. A range of businesses were surveyed and some of the questions related to business needs relating to tourism on the island.

2.46 One of the questions asked how important they thought Hayling Island tourism was to the success of their business. 60% answered that it was of low importance, with 14% saying it had some importance, 14% saying it had high importance and 12% saying it had very high importance. The comments indicated that sales and turnover were better in the summer season although the tourist facilities in the island are run down and the area needs promoting.

2.47 Another question asked if they would like to see or take part in any annual tourism events. This response was very close with 47% saying yes and 53% saying no. Events relating to sport were suggested as were a family competition using the beach facilities. The new scarecrow festival is an example of local businesses interest in new tourist attractions.

## 3.0 Strategies and Policies

3.1 As well as background evidence above there are a number of strategies and good practice guidance on tourism which will impact on the scope of tourism policy within the LDF .

### Communities and Local Government Good Practice Guide on Planning for Tourism

3.2 This advice note was issued in 2006 as a replacement to Planning Policy Guidance 21. The purpose of the guidance is to ensure that planners understand the importance of tourism when preparing development plans and recommending on planning decisions. It advises that it will be appropriate for the core strategy document to cover tourism issues together with any objectives relevant to tourism. Local authorities will need to consider whether any policies for tourism are needed beyond what is set out in the core strategy and whether tourism is to be addressed as a single issue or as part of a wider topic. Where site allocations for tourism are made these should follow from the objectives set out in the core strategy. Where tourism is an important element of a LDF , the approach will need to be based upon a robust understanding of the characteristics of and trends within the tourism industry based on similar issues to those set out in Regional Spatial Strategy ( RSS )

3.3 This advice has been taken into account both in the 2007 Tourism and Leisure Plan and the LDF . Tourism will be considered as a core issue in the LDF , under the local economy section.

### Tourism South East Advice

3.4 TSE advice accords with Havant Borough Council's aspiration and wishes to see the LDF system reflect the importance of this growth industry with the inclusion of planning policies that support appropriate sustainable growth of the tourism sector in the area. TSE believes that tourism should explicitly feature in any 'economic development' chapter.

3.5 Policy should reflect the benefits that tourism can bring to the area and to the local economy. Where applications for tourism development are put forward, policy should seek a balanced view between the need to protect the environment and countryside and the benefits that the tourism initiatives may bring to the area, even if this benefit is likely to be only modest in terms of income generation.

3.6 In terms of accommodation, TSE supports the protection of existing visitor accommodation, particularly where there is considerable pressure for the loss of these to other uses. Planning policy needs a requirement by which the Council has to have sufficient evidence in the form of a marketing report and evidence of a clear and demonstrable lack of demand for the facility should be provided. TSE has produced its own guidance on how to implement tourist accommodation retention policies in development plans [12].

3.7 TSE encourages a positive stance towards the provision of new visitor accommodation in the form of conversions of a wider range of existing (rural) buildings; appropriate extensions of existing accommodation; appropriate additions to accommodation; and entirely new provision where this is supportable and appropriate. It advocates that all tourism developments (including rural) should be of

appropriate scale and design as to be congruent with their surroundings using local materials and labour.

3.8 Policy should not be excessively prescriptive by restricting hotel development to specific (allocated) locations or zones unless research in this area has been completed.

3.9 The LDF should promote opportunities to diversify the economic base of the region's coastal resorts, whilst consolidating and upgrading tourism facilities in ways that promote higher value activity, reduce seasonality and support urban regeneration.

## South East Plan

3.10 The South East Plan identifies coastal resorts specifically and consider local planning authorities should identify and define 'core areas' which encompass the key visitor attractions and facilities and prioritise investment into these areas, and to which specific tourism related planning policies apply for the purposes of controlling inappropriate development; co-ordinating environmentally sustainable development objectives; identifying land for particular types of tourism related development; and identifying necessary infrastructure investments. It also gives priority to improving the quality of existing attractions to meet changing consumer demands and high environmental standards in terms of design and access. Policies for visitor accommodation should be based upon an understanding of the needs and characteristics of the different accommodation sub-sectors.

3.11 The plan proposes the upgrading and enhancement of existing un-serviced accommodation where this will not harm the landscape quality or environmental assets. It requires particular attention to be made to identifying suitable alternative sites for the relocation of holiday parks that are under threat from coastal erosion and flooding.

## The Havant Borough-Wide Tourism and Leisure Plan 2007-2012

3.12 The Tourism and Leisure plan outlines a framework for the development and management of tourism and leisure in the borough. Its aim is to develop and extend the borough's position as a diverse and quality destination. It will be taken into consideration when devising tourism based policies for the LDF in order to ensure its objectives are met.

3.13 The objectives of the Tourism and Leisure Plan are to:

- Enhance the promotion of Havant's tourism and leisure offer.
- Raise the quality of Havant's tourism and leisure offer.
- Improve the image of the borough among residents and visitors.
- Facilitate the delivery of improvements to raise participation, health and well-being.
- Maximise opportunities for learning and skills development to support tourism and leisure businesses and prosperity for residents.
- Attract inward investment, especially those who can deliver prominent sites e.g. hotels and conference and leisure facilities.

3.14 There are a number of priorities in the accompanying Action Plan to the Tourism and Leisure Plan. Those which are of principal relevance to the LDF are the following:

- Improve the image and vibrancy of town centres.
- Support funding bids to achieve the vision outlined in the 2006 project 'Destination Hayling Island' which was the framework of a bid for Big Lottery funding.
- Investigate the potential of aspirations to develop the Civic Centre site to provide new leisure facilities.
- Support the Community Allotment Project to utilise under used spaces.
- Progress the Campdown Project ensuring maximum future community use
- Support the development of Havant Thicket Reservoir.
- Progress the development of hotel and conference facilities at Dunsbury Hill Farm.
- Replace/improve park buildings in particular those in Bidbury Mead and Waterlooville Recreation Grounds.
- Ensure additional leisure facilities are provided for Waterlooville MDA residents. Key potential projects include dry-side provision at Waterlooville Leisure Centre and a new artificial turf pitch.
- Support the development of facilities at Havant and Waterlooville Football Club.

3.15 Not all of these priorities are tourism specific or will be covered by tourism specific policies in the LDF , but they will be taken into consideration.

### **Havant Borough District Wide Local Plan 2011**

3.16 The current development plan for Havant Borough has policies relating to the protection, development and improvement of tourist attractions, tourist accommodation and also ancillary facilities. These policies should stay or be covered in the LDF as they are effective at protecting and maintaining tourism within the borough. The plan also identifies areas as 'core areas' for tourism development on Hayling Island. These are: Creek Road; Rails Lane; Central Beachlands; Mill Rythe Holiday Centre; Lakeside Holiday Centre; Sinah Warren Holiday Centre; and the static holiday caravan area in Eastoke. The designations of these areas should be looked at again and whether they should be taken forward into the LDF . There could possibly be a Supplementary Planning Document on identified tourist core areas in future.



## 4.0 Conclusions

4.1 Tourism is a wide ranging sector with numerous stakeholders and should feature prominently in Havant's Local Development Framework. Tourism is an important employment generator for Havant borough and the focus should be on maintaining and enhancing the existing offer and on extending to meet changing customer needs. The focus of development should now be on sustainable tourism, in terms of impact on the natural environment but also on employment generation and visitor numbers and satisfaction.

4.2 The Council's Tourism and Leisure Plan promotes tourism in a realistic and sustainable way as a growth sector within the borough and the policies in the LDF should have a focus on fulfilling the priorities of this plan in such a way as to balance with the other sections and criteria of spatial development.

4.3 From the various surveys carried out in the borough, the following main points are of consideration:

- Most staying visits in Havant area are for leisure/holiday purposes and Havant has the 5<sup>th</sup> largest number of staying trips in Hampshire.
- A fifth of Havant expenditure by staying visitors is by those in static caravans.
- Staying visitors were more likely to be on Hayling than on the mainland.
- Day visitors are the most the common visitor
- Visitors on Hayling Island reflected a slightly younger age profile than those surveyed on the mainland.
- There is a trend towards shorter and more frequent breaks.
- Most frequently visited attractions were Hayling Amusement Park and Staunton Country Park.
- Positive aspects of the borough are its uncrowded, uncommercialised, peaceful nature and its sea front, scenery and open spaces.
- Hayling seafront could do with updating and regenerating.
- There is a lack of investment in tourist facilities across the borough.
- Need for more attractions e.g. cafes, bars, restaurants, in town centres and Hayling Island
- There is a demand and developer interest in the possible development of a 3 star, upper tier budget or budget hotel in the borough.

4.4 The key priorities for tourism across the borough are:

### Hayling Island

4.5 Hayling Island is the birthplace of windsurfing and this makes it unique in terms of its offer. Opportunities to focus on this as an unique selling point should be explored. The 'Destination Hayling Island' project is work in progress and is supported in the Tourism and Leisure Plan. This project will enhance and improve the sea front of Hayling Island and regenerate the Beachlands area. This scheme will fulfil much of the concern raised by visitors that Hayling sea front is run down and needs investment. Hayling Island is the focus of more family orientated holidays and there should possibly be more focus on providing facilities for this market. There is scope for providing for and promoting other types of activity and themed holiday, for example those centred on bird watching, sailing, wind surfacing, cycling, horse riding, golf, fishing or walking perhaps to extend Havant's tourism offer. Such holidays could be promoted on Hayling Island or around the harbours, subject to



environmental constraints. Any policies will need to ensure that the current tourism offer is maintained and enhanced on the island.

## Emsworth and Langstone

4.6 Emsworth and Langstone's appeal comes from their unique history and their water front settings. There is limited potential for further development in both, without them becoming over commercialised. These centres should retain their quaint historic feel and the current nature of their tourism offer. Any policies should ensure that the existing offer is not harmed and is maintained in a sustainable way.

## Staunton Country Park

4.7 Staunton Country Park is already a popular tourist attraction. The development of Havant Thicket Reservoir should be promoted as a tourism attraction within Havant. There is the possibility of new leisure services and facilities being created which would also serve local residents as well as visitors. The development of Dunsbury Hill Farm employment site near by with associated hotel facilities would provide new accommodation in this part of the borough which, by proximity to the A3(M) gives easy access to the area and attractions. A hotel development in this location would fulfil the needs of the business market during the week and provide a facility for short breaks at weekends.

## Town Centres

4.8 The town centres are currently not big tourism hotspots but there is some potential to improve their share of the tourism market. There is little in the way of an evening economy at present, with limited restaurants and bars. Potential re-development of Market Parade could offer the possibility of new leisure and recreation facilities next to Havant Park.

4.9 Havant's principal strengths in the visitor market lie in its harbourside, sea front and beaches on Hayling, the popularity of its camping and caravan parks and the diverse provision on Hayling Island, the historic setting of towns like Emsworth and Langstone, and the open scenery in areas like Staunton Country Park. There is potential for tourism growth with the regeneration of Hayling seafront and the possible development of facilities near Staunton Country Park.

4.10 In the future more low key and nature conservation related facilities should possibly be considered around the harbours as an alternative offer as there is potential to make more of the coastline on the mainland.

## 5.0 References

1. Brewster S. (2006) A SWOT Analysis of Tourism in the borough of Havant
2. Communities and Local Government (2006) Good Practice Guide on Planning for Tourism
3. Havant Borough Council (2007) Havant Borough-Wide Tourism and Leisure Plan 2007 – 2012
4. Havant Borough Council Community Pulse Survey October 2006
5. Havant Borough Council (2006) Core Strategy Issues and Options consultation paper July 2006
6. Havant Borough Council (2005) Havant Borough District Wide Local Plan
7. Hayling Island Business Needs Survey 2006/07
8. South East England Regional Assembly (2006) Draft South East Plan
9. Tourism South East (2005) Hampshire Hotel Trends Survey
10. Tourism South East (2006) Hampshire Hotel Futures: site assessment, developer testing and issues paper
11. Tourism South East (2006) Havant borough Visitor Survey 2005
12. Tourism South East (2006) Here to Stay? Tourist accommodation retention and loss
13. Tourism South East (2006) Sector specific paragraphs for Local Plan and LDF representations
14. Tourism South East (2006) The Economic Impact of Tourism on Hampshire: County and District Results
15. Tourism South East (2004) The Economic Impact of Tourism in Havant in 2004
16. Tourism South East Website: [www.industry.visitsoutheastengland.com](http://www.industry.visitsoutheastengland.com)

---

Bottom of Form