

# COMMUNITY ATTITUDES SURVEY 2004

## – SUMMARY OF RESULTS

### 1. SURVEY DETAILS:

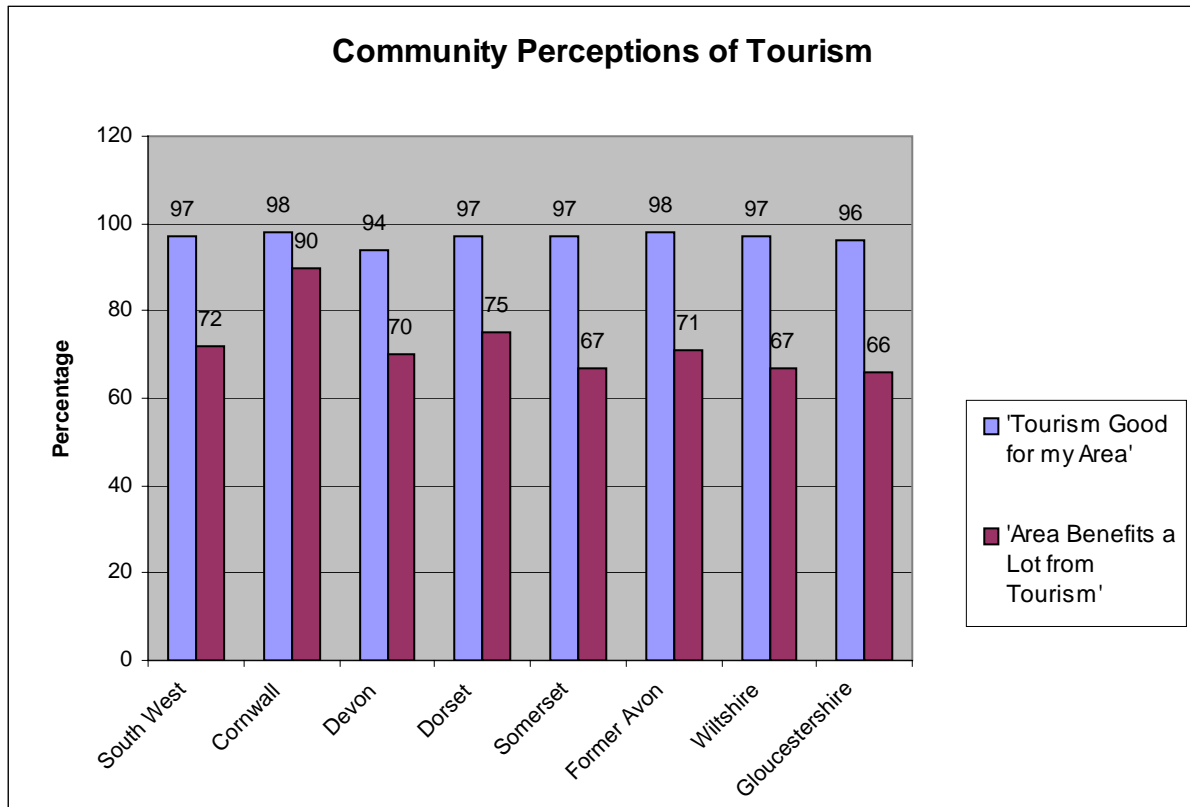
- 2800 SW residents surveyed across the region, 400 per county.
- Unless stated, the results below are regional averages, identifying only where significant responses were recorded eg. more than 50% positive or negative.
- A county and destination type split of the responses was also made, using the following locations (selected by interviewees):
  - Counties: Cornwall, Devon, Dorset, Former Avon, Gloucestershire, Somerset, Wiltshire.
  - Destination types: Rural Coast, Seaside Resort, Inland Rural, Protected Rural, Cities and Large Towns, Smaller Towns.

Results of these splits are highlighted only where a significant departure from the regional average was recorded.

- 93% of those surveyed have lived in the region for more than five years, 83% for more than ten years.
- 21% of those surveyed are involved, or have someone in their household involved in tourism, ranging from 27% in Cornwall to 15% in Former Avon. This involvement is spread amongst accommodation, retail, food and drink, attractions and transport.

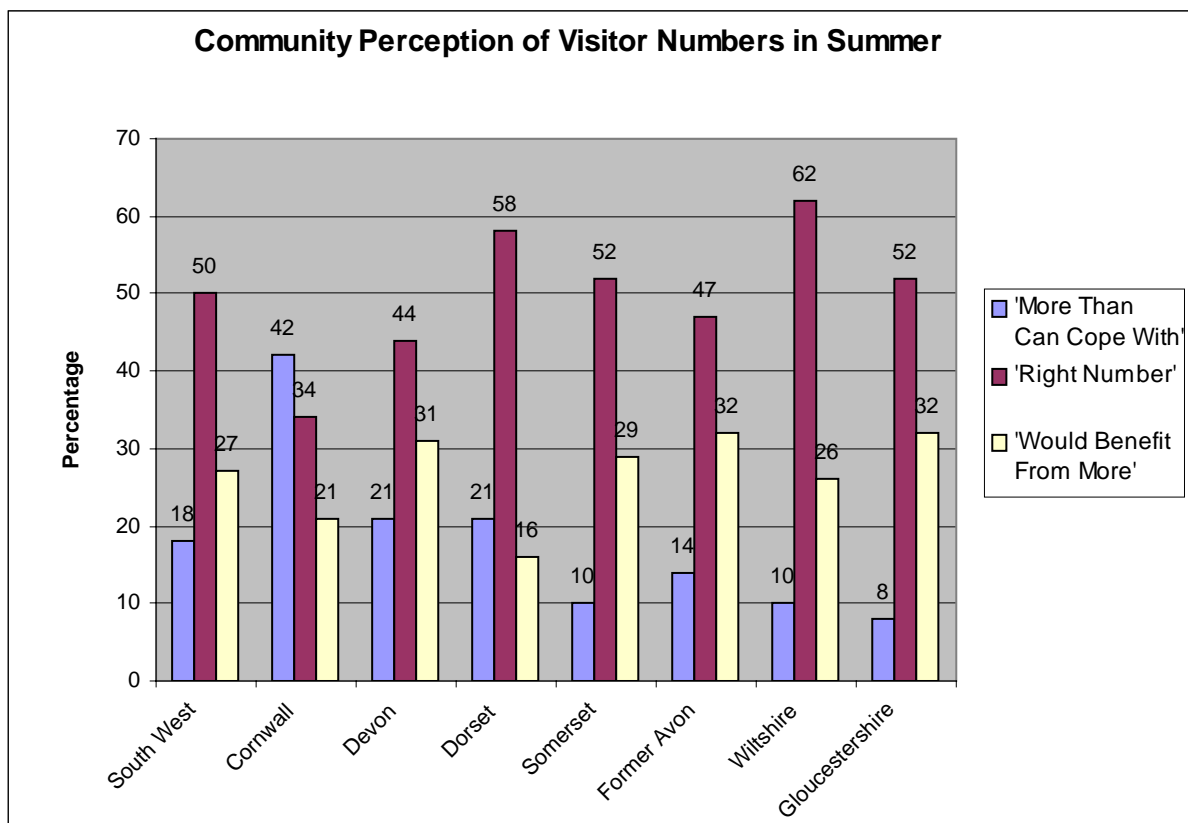
### 2. TOURISM IMPACT ON COMMUNITIES

- **97% of those surveyed feel that tourism is good for their area.**
- **95% feel that tourism positively benefits their area, 72% think it does so ‘a lot’.**
- 89% are proud to live in an area worth visiting, particularly evident in Cornwall, where 77% strongly agreed.
- 87% indicated that they aim to help visitors as much as possible.
- 52% feel that visitors do not affect their lives, 31% ‘a little’ and 17% ‘a lot’ (although 42% felt they did ‘a lot’ in Cornwall).

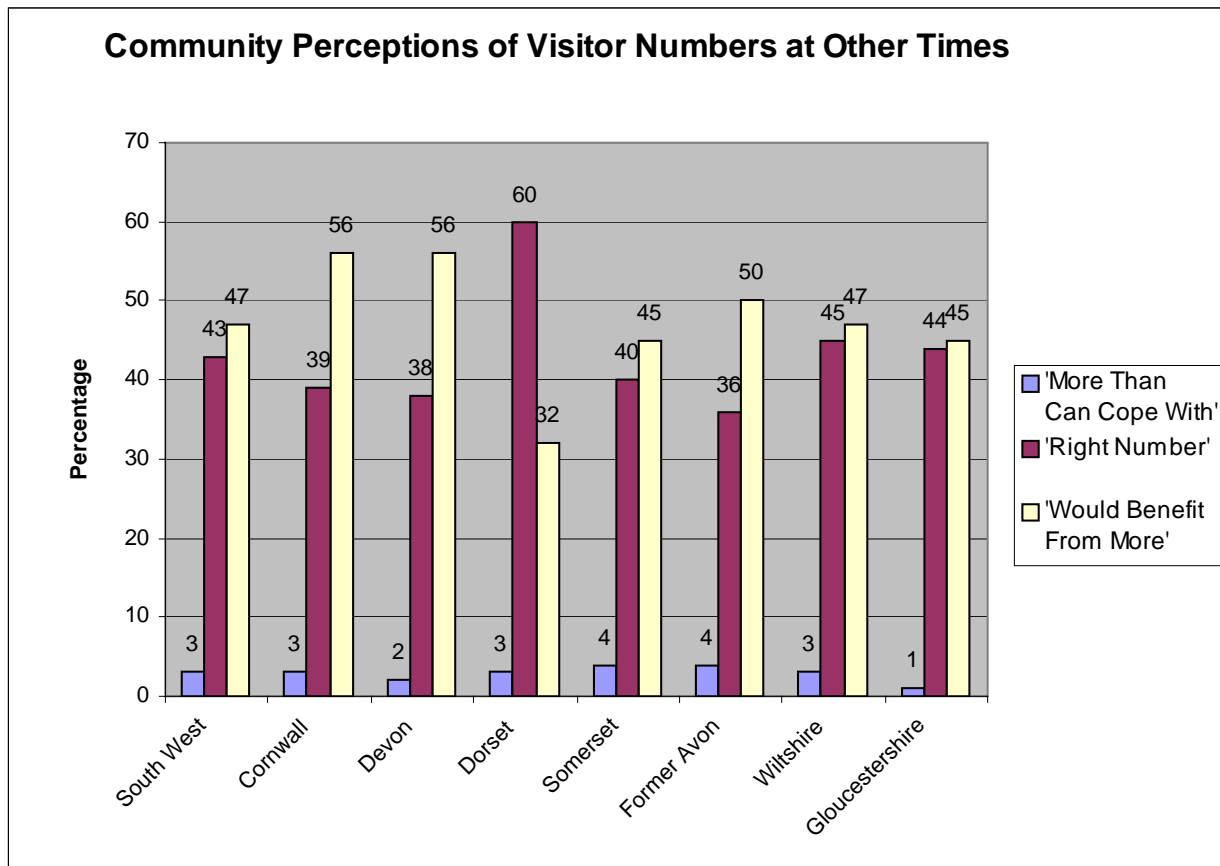


- The survey results also show mainly **positive** perceived impacts due to tourism, of which the most significant factors are:
  - More income for local businesses (93% agreed).
  - Better choice of cafes / restaurants (66%) and shops (52%).
  - Wider range of attractions and leisure facilities (61%).
  - Better maintained heritage (73%).
  - Local food, drink and crafts development (80%).
  - Support for local traditions and customs (63%).
  
- However some **Negatives** were also identified:
  - Traffic congestion and parking problems (77% agreed). As expected, this was particularly identified in areas with high levels of tourism eg. Cornwall (95%), Dorset (85%), Devon (81%) and in coastal areas eg. Rural Coast (87%), Seaside Resorts (83%).
  - Poorly paid, part-time and seasonal jobs (64%). Again associated with high tourism areas eg. Cornwall (89%), Devon (78%), Dorset (73%) and in coastal areas eg. Rural Coast (80%), Seaside Resorts (75%).

- Litter - significant only in coastal areas eg. Rural Coast (53%), Seaside Resorts (56%) and in Dorset (67%).
- Second Homes – only 41% agreed overall, but identified as a particularly significant issue for Cornwall (85%), Devon (57%) and Rural Coastal areas (64%).
- The views expressed also contradict some common negative perceptions about the impact of tourism and visitors to the SW eg:
  - Causing higher shop prices (30% agreed).
  - Damage to the natural environment due to tourism (23%).
  - Cause of increased vandalism and crime (15%).
  - Lack of respect amongst visitors for community way of life (11%).
- In terms of the spread of tourism throughout the year, for **summer tourism levels**, 50% of residents feel that visitor numbers are 'about right', 18% feel 'too many' and 27% feel that their area would 'benefit from more' visitors. The only significant departures from these regional averages were in Cornwall (42% felt 'too many') and rural coastal areas (29% 'too many').



- At **other times of year**, 43% feel that visitor numbers are about right, only 3% consider that there are too many visitors and 47% feel that their area would benefit from more, with no significant variations amongst counties and destination types.



### 3. COMMUNITY ROLE OF TOURISM

The Survey also reveals some interesting indications of how the community values and uses elements of the 'tourism product', showing the role tourism development can play in affecting the SW's quality of life.

- In terms of natural aspects, the countryside easily tops the list in importance to SW residents, 91% identifying its value to them. This varies from 99% in Cornwall to 87% in Dorset and former Avon.

Other important natural features highly valued by SW communities are:

- Nature / wildlife (62%) and gardens (60%).
- Fresh air (56%)
- Aquatic environment – our beaches/ coastline (50%) and inland waterways (55%).
- 'Peace and quiet/tranquillity', whilst not a given category in the questionnaire, was separately identified by 29% (63% in Cornwall).

Leisure related features of significant importance are:

- Entertainment – pubs/bars (66%) and restaurants (49%), shopping (54%), with local food and drink (61%) highlighted as particularly important.
- Culture – historic buildings (57%), museums/galleries (48%).
- Activities such as cycling (45%), fishing and golf (53%).

However the survey has also considered actual community use of these features. A comparison between the stated value placed on them by residents and their indicated levels of use reveals some gaps between the two, particularly for:

- Outdoor activities
- Visits to attractions and cultural events / places.
- Use of local food and drink

This points to towards potential needs for further product development and promotion to communities to improve levels of use.