4.0 Tourism

Introduction

55. This section looks at tourism in terms of (i) those businesses which form part of the tourist trade in the Harbour (ii) visitor spend, and (iii) employment. It concludes with valuation details.

56. In terms of tourism demand, people visit the AONB for a variety of reasons which mostly include recreational activities of one sort or another (see **para 100**). They also come to enjoy the hospitality of the harbour and will stay in the area. People stay in accommodation at Birdham, Bosham, Dell Quay, Emsworth, Hayling Island, Itchenor, West Wittering and further afield. There are some 70 accommodation providers in the AONB. These include hotels, B&Bs, self-catering cottages, caravan parks and campsites. There are some 63 restaurants and cafes.

57. Visitors to the AONB include residents and people travelling from various locations in the south east and beyond. The 2007/08 survey of land-based recreation (Chichester Harbour Conservancy, 2008) showed that from a sample size of 500 interviews, 72% of visitors lived within ten miles of the harbour.

58. Questionnaire data shows that 70% of tourism businesses contacted believe that the tranquillity of the AONB is a factor in helping to attract visitors to use the services they offer. As a business in its own right, tourism contributes to the local economy and provides employment opportunities, some of which are seasonal.

Tourism businesses: Questionnaire Responses

59. To help the evaluation process, a questionnaire was sent to 151 tourism businesses. The questionnaire sought information about turnover, number of employees and visitor spend.

60. A total of 21 questionnaire responses were received. Information about turnover and capital assets was not forthcoming and the most useful aspect of questionnaire returns concerned the number and type of visitor, including how long they stayed and amount spent. Information about employment figures was also useful.

Visitor numbers and spend by day trippers

61. In terms of visitor numbers and spend, the study seeks to identify where people have come from, how far they are prepared to travel, why they visit, how much they tend to spend and how they spend their money on tourism. People visiting the AONB are examined in terms of daytrippers[17] and overnight stays.

62. It is possible to measure visitor patronage at car parks to estimate the total number of day visitors. Visitor spend may be estimated by using the data from the car parks and applying the average spend per visitor (which is available from Tourism South East, see **para 65**).

63. There are three main public car parks in the AONB: West Wittering, Bosham and Itchenor. In the case of West Wittering, the West Wittering Estate have indicated that the car park has approximately 150,000 cars visiting per year. Figures for Bosham and Itchenor are not available. For the purpose of this report, the same rate of growth in car park patronage between 2001[18] and 2008 that has taken place at West Wittering[19] has been estimated, which is 11%. On this basis, between them, it is estimated that Bosham and Itchenor sell some 122,100 tickets

annually.

64. Assuming that the average number of people in a car is three[20] (see Valuing Chichester Harbour, 2001) and taking account of the fact that 63% of all visitors to Chichester Harbour and the AONB arrive by car, coach or motorbike (Chichester Harbour Conservancy, 2008) it is possible to estimate the total number of visitors using the AONB. This estimated total comes to at least 1,360,500 people.

65. Similarly, it is possible to calculate annual tourist expenditure by using the Tourism South East report data, specific to Havant Borough (2007) and Chichester District (2006). According to the report, the Havant average day trip spend is £31.69 whilst in

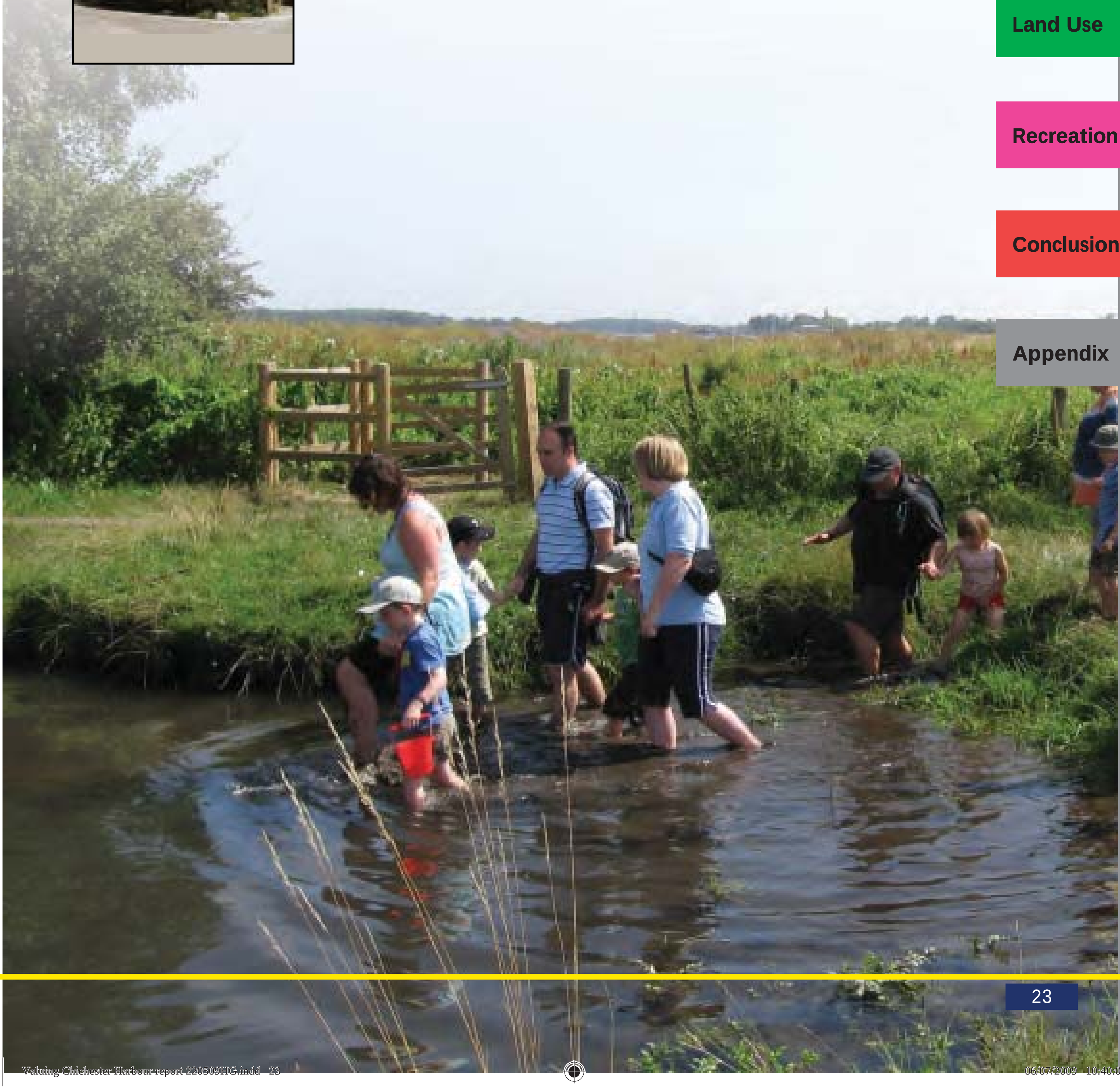
Chichester it is £32.58. On this basis, the average day trip expenditure in the AONB is £32.14 per person.

66. Applying this to the number of daytrippers using car parks, the total expenditure can be estimated at £44 million[21] per year.

Visitor spend through overnight stays

67. Information about overnight stays is limited by the small sample size of questionnaires returned. Whilst information can be obtained about the number of overnight visits in the local authority areas of Havant and Chichester from Tourism South East data, the information is not easily disaggregated at an AONB scale. For this reason, it has not been used.

68. The questionnaire results showed that there is a wide variation of information relating to overnight stays and that the average spend was £81.00 per person. The price for overnight stays does not include money spent at restaurants.



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Employment

69. For each category of tourism business type the study has sought to estimate the number of people employed in each business. To avoid double counting, recreational businesses and activities are not included in this section; the recreation section deals with this aspect (see **para 100**).

70. The questionnaire results showed that of the 17 accommodation providers in the AONB (hotels, B&Bs, self-catering, caravan parks, campsites) who responded to the questionnaire, the average number employed by each establishment was calculated as 28 people (permanent and seasonal staff combined). This estimate can be broken down as follows in Table 8. The highest percentage of staff employed in the tourist sector is full-time workers, but there are also a large proportion of seasonal workers.

Table 8: Patterns of employment amongst tourism businesses

	Proportion of full-time staff	Proportion of part-time staff	Proportion of full-time seasonal staff	Proportion of part-time seasonal staff
All tourism businesses	37%	30%	4%	29%

71. Through scaling up the questionnaire findings and applying them to all of the accommodation providers, the number of part and full-time employees associated with the tourism industry is approximately 1,960 employees[22]. This illustrates the importance of the sector at a local level when compared, for example, with the 884 jobs associated with maritime businesses (see **para 39**).

VALUATION SUMMARY for TOURISM

- **Valuation of the tourism sector has in large part been estimated according to questionnaire returns (21 out of 132).**
- **Visitor numbers (day trippers) have been estimated using car parking data: some 1,360,500 people visit the Harbour each year.**
- **The average daily expenditure in the AONB is £32.14 per person.**
- **The average overnight spend is £81.00 per person.**
- **Questionnaire data did not provide details of tourism business turnover. However the spending estimates which have been applied to day trippers contribute significantly to the turnover of tourism businesses.**
- **The combined value of tourist-related activities in the AONB can be estimated to be £44 million plus overnight stays.**

CASE STUDY 3: THE WITTERINGS

The Witterings are a famous tourist destination and are made up of East and West Wittering. The area of the Witterings straddles the AONB boundary. Whilst West Wittering lies within the AONB boundary, tourism data for the Witterings has been presented as a whole, and has not been disaggregated to address activity and expenditure exclusively inside the AONB. Nevertheless it is well worth illustrating that certain parts of the AONB are "honeypot" sites[23] with very significant roles to play in the tourism industry in and around the AONB. Other honeypot sites in the AONB include Bosham, West Itchenor and Emsworth.

West Wittering is a picturesque village, located at the south-east corner of the AONB and is highlighted in this case study as being one of the most valuable locations in the AONB in terms of its aesthetic appeal and the tourism trade it brings in. As a honeypot site, it attracts tourists in their thousands each day over the summer. This is due to its excellent views of the sea, harbour and South Downs to the south, west and north respectively and its sandy beaches.

It has high water quality (the beach and sea have been awarded a Blue Flag for cleanliness), extensive mown grassy areas suitable for picnics, and mudflats and saltmarsh which attract wildfowl and waders. East Head is a well known sand dune spit, which is a tourist attraction in itself. West Wittering also has shops, cafes and accommodation, all of which make it an excellent site for tourists.

According to Tourism South East statistics for 2006[24], the number of visitors, total expenditure and number of tourism-related jobs in the Witterings (both West and East Wittering) are a very high proportion of Chichester District as a whole. This is demonstrated in the summary figures below:

Number of visitors:

- *1,464,900 day visits (30% of total for Chichester District);*
- *131,391 trips involving a stay of one night or more (20% of total for Chichester District); and*
- *607,555 nights spent in the area by staying visitors (27% of total for Chichester District).*

Total expenditure:

- *£48 million by day trip visitors (30% of total for Chichester District); and*
- *£23 million by staying visitors (18% of total for Chichester District).*

Jobs supported by local businesses' tourism income:

- *1,413 full-time equivalent jobs (24% of total for Chichester District); and*
- *2,104 actual jobs (24% of total for Chichester District).*

5.0 Land Use

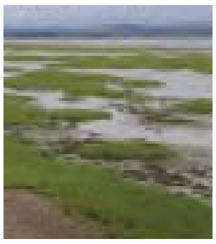
Introduction

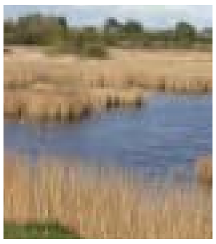
72. This section concentrates on land use in the AONB, with a particular focus on the agricultural sector. As with the rest of this study, the aim has been to provide objective facts and figures about the way in which land use contributes to the economic worth of the AONB. This section considers the value of agricultural land in the AONB, as well as covering the contribution to turnover from diversification activities and agri-environmental schemes.

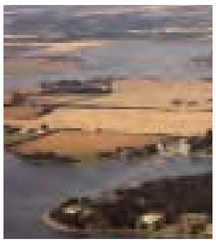
Land Type

73. The most common land type within the AONB is agricultural fields and pasture with fields divided by ditches and hedgerows. The built settlements are small in size and distributed around the edge of the AONB. Brownfield sites are preferred for development but are rarely available.

74. Other land in the AONB is made up of woodlands, ponds, saltmarsh and mudflats. Woodlands are relatively rare but where they do occur they are classified as ancient woodland. Freshwater is confined to scattered ponds in the farmland, ditches and a small number of streams. The zone between mean high and low water, which is exposed as part of the tidal cycle, is dominated by saltmarsh and mudflat. The value of different types of land is strongly linked to the purpose to which that land can be put, or indeed what a purchaser is willing to pay for it. For example, the Grade 1 and 2 agricultural land which dominates the AONB is valuable to farmers because of the high yields it can produce. Similarly, the development value of land is heightened by the restrictive planning policies which seek to conserve the landscape quality of the AONB.







75. The value of intertidal land is becoming increasingly significant from a compensation habitat point of view. Despite the landscape of Chichester Harbour being largely undeveloped and natural in appearance, much of its shoreline has been protected at some point in the last century against flooding through hard defences such as sea walls. The preservation or enhancement of sea defences can lead to a loss of adjacent intertidal habitats, such as mudflats and saltmarshes, as a result of coastal squeeze (a climate change related phenomena). In addition, coastal grazing marsh can be threatened with loss as a result of either the deliberate breach of existing sea defences through managed realignment schemes, or through abandonment of existing sea defences.

Farming

76. The flat, low lying coastal plain of the AONB is characterised by predominantly Grade 1 and 2 agricultural land, making it ideal for arable farming and vegetable growing. Agriculture is the most important activity in shaping the landscape in the AONB.

77. In recent decades, patterns of agricultural practices in the AONB have changed in line with fluctuating national and European economic circumstances and market demands. Despite this, farming still yields high quantities of arable crops and is an important sector of the local economy.

78. Approximately 2324 hectares (54%) of the 4327 hectares which make up the total land area of Chichester Harbour AONB above high tide water, is under agricultural production, ranging from salad produce to wheat and oil seed rape. Areas of permanent pasture are located around the Harbour's edge and are an important landscape feature of the AONB. Livestock farming is limited within the AONB with only two beef herds and three dairy herds still operating. The average farm holding is approximately 39 hectares in size, and more than two thirds are owned rather than rented.

79. Various crops are grown in the area. These include cereals, arable crops, vegetable crops, areas under glass/plastic and fruit. Cereals are the most extensively cropped items in the AONB and include wheat, winter barley, spring barley, and oats. Other crops include potatoes, horticulture, field beans, peas for harvesting dry, oilseed rape, linseed, turnips, other crops for stockfeeding and maize. Vegetable cropping represents a far smaller crop type when compared to cereals and arable crops. In 2004 the area of cropped land under glass/plastic was approximately only 24ha, and the area of fruit cropping was only 4ha.

Value of Farming to Conservation

80. The future management of the AONB's natural environment is reliant on a healthy, vibrant and sustainable farming community working the land. Given the dominance of farmland within the AONB, farmers act as the primary landscape managers and their farming practices help to support the wildlife which depends upon key habitats, such as hedgerows, ditches, woodlands, grassland and the crops themselves.

81. This section has not attempted to value these intrinsic qualities associated with the outputs, or secondary benefits of farming such as landscape quality and value to wildlife. Similarly the valuation of agriculture has not assessed the contribution that organic farming makes, as the questionnaire results yielded little in this respect.

Value of Farming to the Local Economy

82. To look at farming in the same way that other aspects of this study have been considered, such as maritime businesses and tourism, farming has been reviewed in terms of economic turnover and its role as a source of employment. To explore these two aspects, a questionnaire was sent to all farmers within the AONB and information from DEFRA[25] has been reviewed. Farming income is clearly a private matter and as such this report has only worked with the annual turnovers of farm holdings, instead of acquiring more sensitive data related to detailed incomes and outgoings. Besides

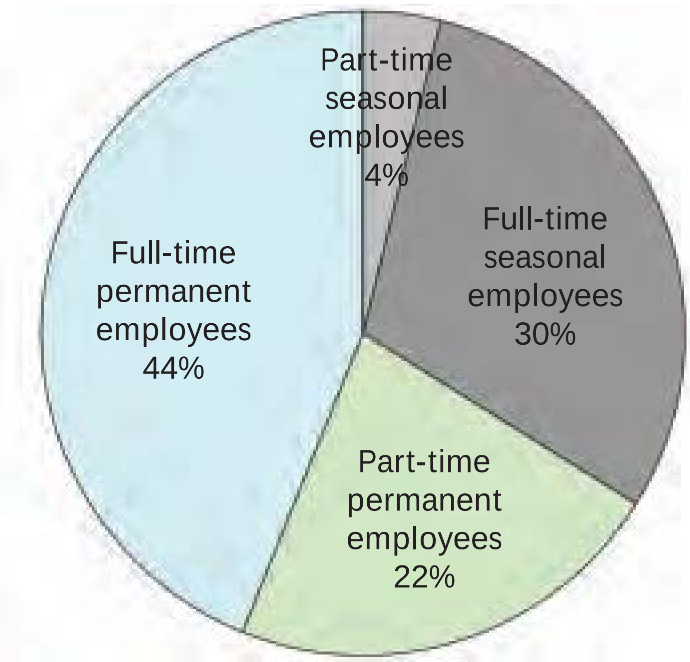
the production of crops or management of livestock, factors which contribute to turnover include farm subsidies and diversification initiatives.

83. The questionnaire was sent to 36 farming businesses located either wholly or partially within the AONB, of which there were 18 responses[26] (a 50% response rate).

Employment

84. The farmers who responded to the questionnaire employ a total of 86 workers, with 34% being employed in seasonal work (see Figure 1). Taking the questionnaire return rate to be 50%, simple extrapolation of the data suggests that the total number of people employed in farming across the AONB could be in the region of 172 people, less than half of whom are full-time, permanent staff.

Figure 1: Employment Breakdown in Chichester Harbour AONB Farming



85. This figure of 172 people is comparable with data from the June Agricultural Survey data (2004) which gives a figure of 188 employees (60 full-time workers, 24 part-time, 104 casual). The difference in the figures (-9%) may reflect the general national decline in permanent farm worker numbers between 2004-2008 or possibly the fact that differing data collection techniques are being used.

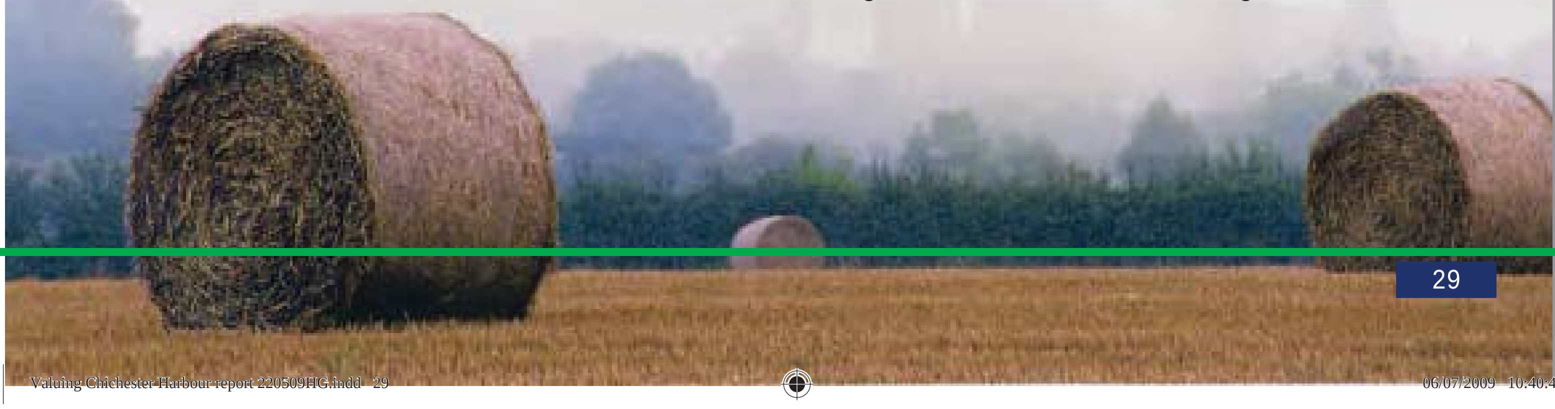
Estimating Turnover

86. The questionnaire findings suggest that average annual farm turnover is estimated to be approximately £5 million, with an average of £368,887 per holding per year. This includes subsidies and diversification activities. It should be noted that no adjustment has been made to account for farms with boundaries which cross the AONB boundary as it has not been possible to divide estates on the basis of their geographic coverage to fit the AONB.

87. Simple factorisation of these questionnaire responses (e.g. doubling the above estimate) suggests that the total estimated turnover for farming activity across the AONB could be £10 million per year.

Subsidies

88. Throughout the European Union, farmers are entitled to claim subsidy payments under the Single Payment Scheme (SPS). Under the scheme, farmers have greater freedom to farm to the demands of the market as subsidies are no longer linked to production, and environmentally friendly farming practices[27] are better acknowledged and rewarded. The SPS provides 'area based payments' to landowners in return for the delivery of environmental benefits to keep land in good environmental and agricultural



condition. Besides the SPS, there are a number of higher level agri-environmental schemes operated by the UK Government. These are important sources of income for farmers who undertake practices which benefit landscape, access and nature conservation.

89. Agri-environmental schemes have been very successful in the AONB with 884ha (Conservancy Data, 2007) under some form of agreement. Feedback concerning agri-environmental incomes from questionnaire respondents revealed that in terms of environmental stewardship schemes, seven of the 18 respondents claimed £12,570 from Higher Level Stewardship in 2007. In 2007/8, Natural England data reported that 29[28] agri-environmental schemes spent £188,735 on farmland environmental projects and management within the AONB.

90. The payments involved were for all three of the Environmental Stewardship schemes: mainly Entry Level Stewardship (amounting to nearly £76,000) and Higher Level Stewardship (nearly £113,000) as well as a much smaller proportion of Organic Entry Level Stewardship.

91. Given the differences between size and type of farm, it would be inappropriate to scale these figures up to provide averages for the AONB farms. Instead, these figures have been presented as contextual information.

Farm Diversification within the AONB

92. Farm diversification has seen farmers branch out into other activities and business enterprises, either related to farming or entirely different from farming, but making use of the natural and other assets that the farm possesses.

93. Defra reports that 50% of farms in England had diversified activity in 2006/7[29], a proportion that rises each year. Many of the AONB farmers have diversified and used their land and holdings for additional value and use.

94. Within the AONB, 67% of the farmers who responded to the questionnaire have diversified activity, the most popular of which were offering holiday accommodation and the alternative use of redundant farm buildings. Other types of diversification activity for AONB farmers included rural tourism and recreation, sale of farm-based products, and catering facilities.

95. Diversification represents a significant proportion of the estimated average turnover at some farms within the AONB. The total annual income made from diversification activities from those AONB farmers who responded to the questionnaire was **£301,192**, with 59% of this figure made up by two farmers offering holiday accommodation. The average income made per business (who responded to the questionnaire) from diversification activities was **£30,119**.

96. The diversification activities of farmers can make up a large proportion of their annual income. Based purely on the seven questionnaire responses which included financial information about farm diversification, the percentage of any one farmer's total income made from diversification ranged from 5% to 99%. The average turnover from diversification for these seven farmers was 44.8%.

Land Values

97. The capital value of farmland is likely to vary according to the grade of land and potential for development. Notwithstanding these factors, productive arable land (Grade 1, 2 and 3a) within the AONB has an estimated market value of approximately £17,290 to £18,525 per hectare (Henry Adams Estate Agents, August 2008). This makes the total estimated value of farmland in the AONB[30] at around £42 million[31].

Other questionnaire findings of interest from farming respondents

98. As well as using information from the questionnaires to estimate the value of agricultural businesses, other useful comments have been gathered. In particular, the following information is of note:

- **The average number of years that holdings have been in operation in the AONB is 42 years, which highlights the long-term commitment and involvement of farming families in the area and quality of the land for farming;**
- **67% of the questionnaire respondent's farms are owned rather than tenanted; and**
- **Nearly half of the respondents felt that the tranquillity of the AONB was an asset to their farming business; one landowner even stated that the water, land and beauty of the AONB make it absolutely invaluable to the survival of his business.**

VALUATION SUMMARY for LAND USE

- **Farming businesses employ around 172 people in the AONB.**
- **Approximately 2,324[32] hectares of the AONB is farmed land.**
- **Farm turnover is made up of products sold, various environmental subsidies, and diversification of activities. Questionnaire feedback suggests that the overall annual turnover (2007-2008) for farming businesses in the AONB was estimated to be £10 million.**
- **The estimated value of farm land in the AONB is £42 million.**
- **The total estimated value of all land use in the AONB is £52 million.**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Introduction

99. The AONB offers a range of recreational opportunities for residents and visitors alike. These activities can be enjoyed by individuals, as part of organised events or through membership of local clubs and societies. Activities are both land and water based.

100. Unlike house prices or the value of marine businesses, recreation is not easily measured in economic terms. This is because the broad range of activities is often inter-related with other activities, for example sea fishing trips will represent turnover of a particular maritime business offering that service. Clearly this would lead to double counting (see **para 31**). On the other hand, some activities are ‘free’ to the user e.g. walking, painting and kite flying, but are still associated with the cost of managing footpaths and public open spaces. Again the complication of double counting arises.

101. From the diverse range of recreation which includes walking, cycling, swimming, sailing and bird watching, only recreational fishing (angling) and wildfowling can reasonably be distinguished as discreet economic entities.

102. In contrast to the decline in commercial fishing, recreational angling, from boats operating inside and outside the Harbour has been a significant growth area (see para 29). Dell Quay is especially popular with fisherman hoping to catch, amongst others, flatfish such as flounders. Fishing also takes place from boats which set sail from the harbour and go out, for example, mackerel fishing. There are five angling associations within the harbour: Barn Sea Anglers; Bosham Fisherman’s Association; Emsworth Sports and Social Club; Apuldram Boat and Fishing Club; and Emsworth Fisherman’s Association.

103. There are strong cultural associations with gunsports and wildfowl at Chichester Harbour and although it is a minority activity when compared with the numbers of sailors and walkers, it nevertheless forms a recreational activity which contributes to the value of the Harbour.

Value of Angling and Wildfowling

104. Of the five angling associations, three have provided information on their activities and membership. Between them, the three clubs have 139 members. The combined annual revenue of the three clubs, as indicated from questionnaire returns, is approximately £23,340.

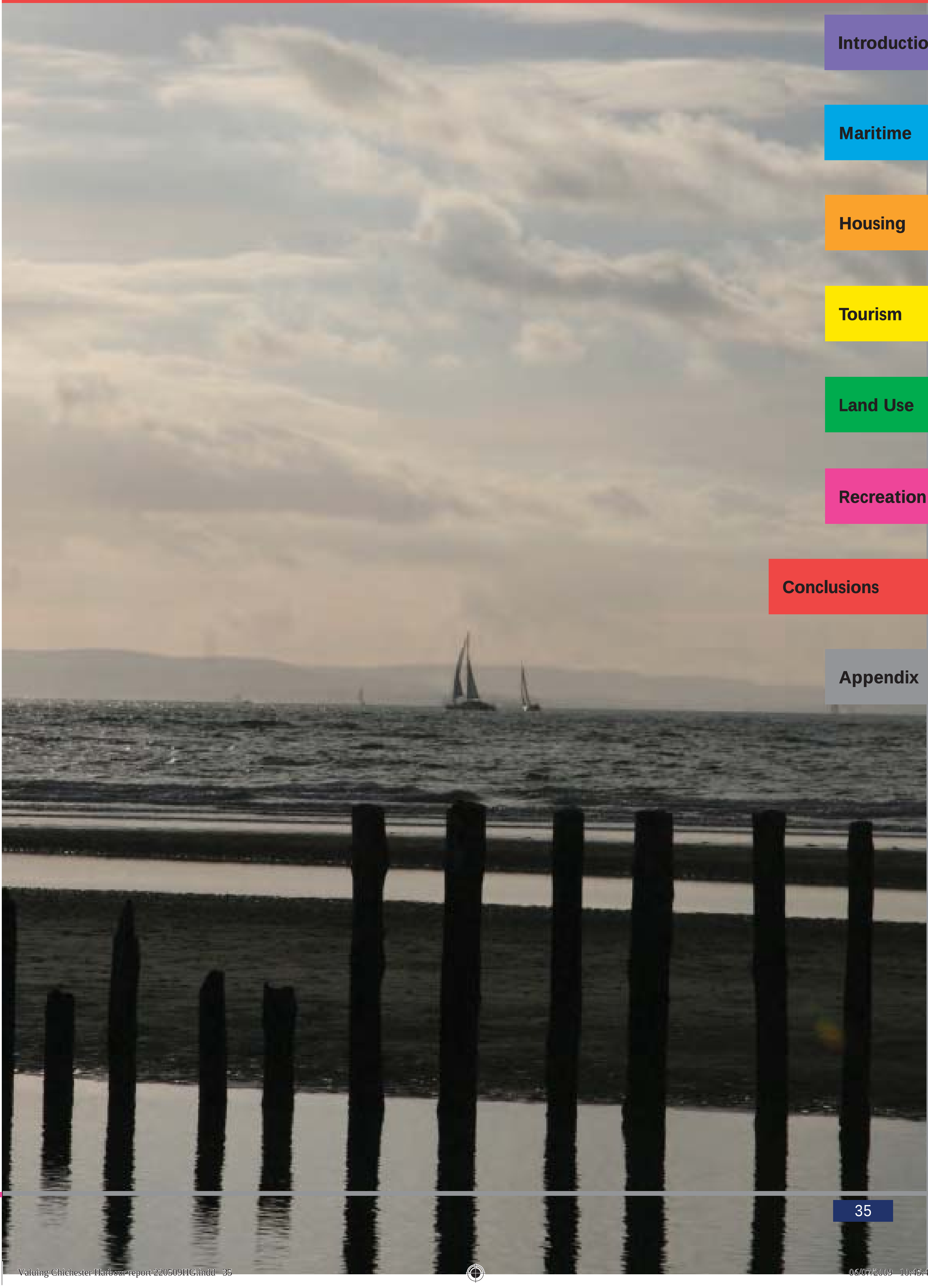
105. Based on information gathered from local tackle shops and from observation of activity at the Harbour, about 10,000 amateur anglers fish in the Harbour every year. They spend on average £100 a year each on tackle, bait and charter trips. This adds up to a £1 million pound turnover. Within this figure, the seven angling charter vessels operating from the Harbour have an annual turnover of £95,000.

106. There are two wildfowling associations in the AONB; Emsworth and District Wildfowling Association and Chichester Harbour Wildfowling Association. The clubs have a current total membership of 75 and combined annual revenue of approximately £31,200. This is made up of membership fees and events that are open to members' families as well as the general public.

VALUATION SUMMARY for RECREATION

- **The combined annual revenue of the three angling clubs, as indicated from questionnaire returns, is approximately £23,340.**
- **The seven angling charter vessels operating from the Harbour have an annual turnover of £95,000.**
- **The wildfowling clubs have a current total membership of 75 and combined annual revenue of approximately £31,200.**
- **The total estimated value of angling and wildfowling in and adjacent to the Harbour is £1.05 million.**

7.0 Conclusions



Conclusions

107. This study has been developed to provide a strategic review of Chichester Harbour's economic worth based on some of the key aspects of the Harbour and its surrounding land. Specifically, this report has examined the contribution of maritime businesses, housing, tourism, land use and recreation, to the Harbour's economy.

108. A range of techniques have been used to value the Harbour's worth. Various datasets have been reviewed and questionnaires have enabled a professional interpretation of available information to inform estimates. Whilst some datasets have been rejected as not being useful, others have been cited in the above sections. Valuation Summaries for each of the five topic areas are presented in the Appendix (pages 40-41).

109. The total value of Chichester Harbour has been estimated to be **at least £2.78 billion**. This cumulative figure is made up of individual valuation information from maritime businesses (£524M), residential property (£2,151M), tourism (£44M), land values (£52M) and recreation (£1.2M).

110. This valuation, covering 2007-2008, represents a snapshot of the Harbour. The information can be used for a variety of purposes including policy making and practical management decisions. It is recommended that this report is prepared again in five years time to enable progressive monitored economic reports to continue to inform AONB management and shape the future of Chichester Harbour.

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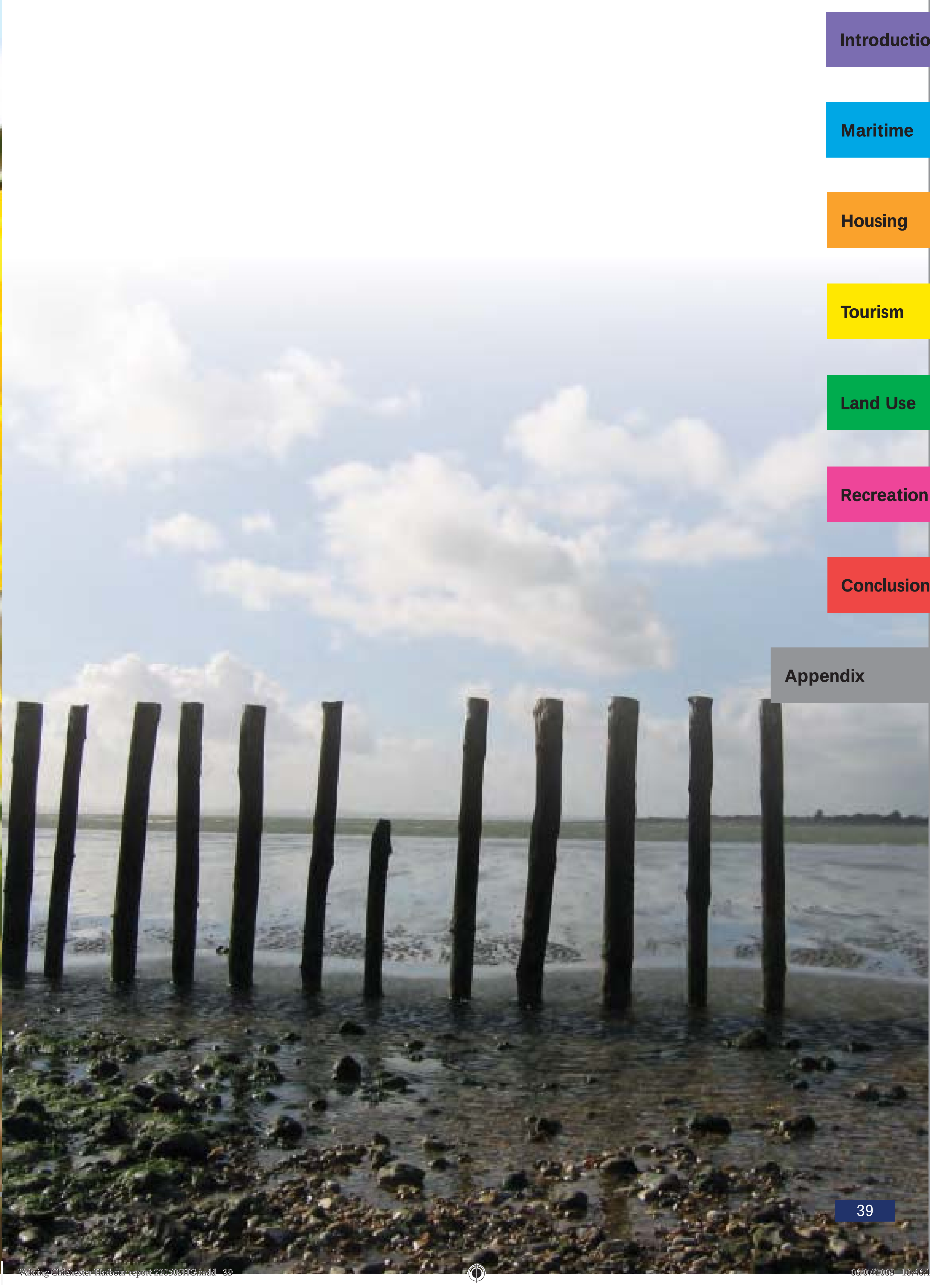
End Notes

1. Capital Assets for each category in the order listed are: £90,020,000; £512,500; £7,200,000; £575,000; and £2,000,000.
2. Average Capital Assets Value per business in the order listed is: £3,334,074; £256,250; £1,800,000; and £191,667.
3. Annual turnover for each category in the order listed: £36,047,775; £1,311,500; £1,869,382; £370,000; and £632,192.
4. Average annual turnover value per business in the order listed is: £1,092,357; £653,250; £267,055; and £74,000.
5. The multiplier has been used to estimate total value of all businesses in the Harbour. Having only received information from 50% of those businesses who were invited to respond with a questionnaire, the turnover for the other 50% have been estimated using expert opinion from the Harbour Conservancy. The Conservancy have been able to draw on their day to day, year on year experience of working with the different businesses which operate in the Harbour. The derived multiplier value (1.75) has been applied to the information obtained from questionnaires. The results are presented in Table 2.
6. Chichester Harbour Conservancy Data Records (2008).
7. Chichester Harbour Conservancy (2001) Valuing Chichester Harbour.
8. Chichester Harbour Conservancy (2001) Valuing Chichester Harbour.
9. Information obtained from Chichester Harbour Conservancy (2008).
10. Information obtained from Chichester Harbour Conservancy (2008).
11. Maritime business category 1: Boatyards, marine services, marinas, yacht brokers, chandleries, moorings and boat repair businesses.
12. Changes of Ownership by Dwelling Price Database (2006), Neighbourhood Statistics – National Statistics Website http://www.neighbourhood.statistics.gov.uk/dissemination/
13. Number of Rooms Dataset, Census 2001 (April 2001), Neighbourhood Statistics – National Statistics Website http://www.neighbourhood.statistics.gov.uk/dissemination/
14. LSOAs are a unit of geography created by the Office for National Statistics as part of the UK Census data management system.
15. The term ‘AONB Parish’ refers to a parish which is wholly, or partially, located within the AONB.
16. 14% derives from a percentage calculation of the total number of second homes in the AONB Parishes (580) divided by the estimated number of properties in the AONB (4186).
17. Tourism day trips are defined as a visit to and from home for leisure purposes, undertaken on an irregular basis and lasting a minimum of three hours. The report excludes trips undertaken for business or study purposes, as these are not covered by the Leisure Day Visits Survey methodology. The definition of day trips adopted by this study is that used by the Department of Culture, Media and Sport.
18. In 1999/2000 Bosham and Itchenor car parks sold, collectively, 110,000 tickets (Valuing Chichester Harbour, 2001).
19. In 1999/2000 West Wittering car park sold 133,000 tickets. By 2008, this figure has risen to 150,000, representing an increase of over 11%.
20. If the average number of visitors arriving in the car park under one ticket is three, the total annual number of car park users is 816,300.
21. Total estimated figure is £43,726,470.
22. This figure is calculated from questionnaire responses. There are 70 accommodation providers with an average of 28 full or part-time employees associated with them.
23. A honeypot site is an area that is of special interest or appeal to tourists.
24. The Economic Impact of Tourism in Chichester (2006), Tourism South East Research Unit
25. DEFRA June Agricultural Survey data (2004) has been used. The June Agricultural Survey (2004) is an annual survey of agricultural activity which collects information from carefully selected agricultural holdings in England relating to land use, crops, livestock, labour, horticulture and glasshouses.
26. Additional questionnaires were sent to five other farm holdings but their land was discovered to lie outside the AONB boundary and as such have been excluded from our data analysis.
27. The SPS includes an element of cross-compliance whereby any farmer wishing to apply for funds under the SPS must conduct a minimum standard of environmental management on his or her estate. This may include maintaining a range of habitat and landscape features which are characteristic of the English countryside.
28. Whilst there are 18 farms, it is possible to have more than one environmental subsidy scheme operating at once; similarly environmental subsidy is not exclusive to farmers. Other organisations may claim subsidies.
29. Farm Diversification Report (January 2008), DEFRA & National Statistics
30. Assuming 2324 hectares of the AONB are farmed (data derived from the AONB Management Plan 2009-2014).
31. The estimated value is £41,617,030.00.
32. Chichester Harbour AONB Management Plan (2009-2014) p.34.

Appendix



APPENDIX: *SUMMARY OF KEY FACTS AND FIGURES*

MARITIME	
The estimated number of maritime business employees:	883
The estimated total capital assets value for all maritime businesses in Chichester Harbour (excluding fisheries):	£177 million
The approximate total annual turnover for all maritime businesses (excluding fisheries):	£70 million
The estimated value of commercial fishing:	£245,500
The estimated value of vessels in the Harbour:	£277 million
The total value of maritime businesses (based on total capital assets, total annual turnover for all maritime businesses, commercial fishing and Harbour vessels):	£524 million

HOUSING	
Estimated residential population in the AONB:	8,351 people
The total estimated value of residential properties in the AONB:	£2,151 million
Approximate number of dwellings within the AONB:	4,186
The proportion of second homes represents, as a percentage of all residential dwellings in the AONB:	14%
Approximate number of detached houses in the AONB:	2064
Estimated average price for a detached house:	£712,982
Approximate number of semi-detached houses:	1011
Estimated average price for a semi-detached house:	£390,646
Approximate number of terraced houses:	595
Estimated average price for a terraced house:	£345,000
Approximate number of flats and maisonettes:	516
Estimated average price for flats and maisonettes;	£152,733

TOURISM	
Approximate number of accommodation providers in the AONB:	70
Approximate number of people employed in the tourism sector in the AONB:	1,960
Estimated number of day trippers who visit the Harbour each year:	1,360,500
Percentage of questionnaire respondents who believe the tranquility of the AONB is a factor in helping to attract visitors to use their services:	70%
Approximate number of cars visiting West Wittering Estate's car park annually:	150,000
Average daily trip expenditure in the AONB per person:	£32.14
Average overnight spend per person in the AONB:	£81.00
The estimated combined value of tourist-related activities in the AONB (excluding overnight stays):	£44 million

LAND USE	
Farming businesses in the AONB employ:	172 people
Approximately area of farmed land in the AONB:	2,324 hectares
Questionnaire feedback suggests that the overall annual turnover (2007-2008) for farming businesses in the AONB was estimated to be:	£10 million
Number of farmers within the AONB who responded to the questionnaire who have diversified activity;	67%
The average income made per business (who responded to the questionnaire) from diversification activities:	£30,119
The average number of years that holdings have been in operation in the AONB:	42 years
Number of questionnaire respondent's farms which are owned rather than tenanted:	67%
The total estimated value of land use in the AONB:	£52 million

RECREATION	
The seven angling charter vessels operating from the Harbour have an annual turnover of:	£95,000
The wildfowling clubs have a current membership of:	75
The wildfowling clubs have a combined annual revenue of approximately:	£31,200
Combined revenue of three AONB angling clubs, as indicated from questionnaire returns:	£23,340
The total estimated value of angling and wildfowling in and adjacent to the Harbour:	£1.05 million

OVERALL SUMMARY
The total value of Chichester Harbour has been estimated to be at least **£2.78 billion**.
This cumulative figure is made up of individual valuation information from: - Maritime businesses (**£524M**); - Residential property (**£2,151M**); - Tourism (**£44M**); - Land values (**£52M**); and - Recreation (**£1.2M**).