

**New Forest
Strategic Access Management & Monitoring (SAMM) Strategy**

November 2025 Draft

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1. Introduction

Overview

The New Forest Strategic Access Management and Monitoring (SAMM) Strategy report (Footprint Ecology, 2023) sets out a framework and broad approach to ensuring in-combination effects of housing can be addressed and that all authorities are working together to an agreed approach. The report focuses on mitigation measures within the New Forest's designated sites, which will complement the package of measures being delivered by planning authorities within their own respective areas. Natural England has endorsed the report recommendations.

This SAMM Strategy sets out a package of access management and monitoring measures to mitigate the impacts from increased recreation associated with new housing growth on the New Forest Special Area of Conservation (SAC), Special Protection Area (SPA) and Ramsar site. The strategy focuses on plan-led growth within the defined 13.8km zone of influence from the edge of the New Forest SAC/SPA/Ramsar and covers the anticipated level of growth (around 45,000 dwellings) to 2036. It is envisaged that this New Forest SAMM strategy will be reviewed and continue to operate beyond this period, based on the latest evidence and monitoring data.

The package of mitigation measures relates to access infrastructure, engagement and monitoring and will cost around £22 million in perpetuity. Per dwelling tariffs are calculated based on visit rates from each planning authority within the zone of influence, providing a tiered tariff structure that means new housing coming forward closer to the New Forest's designated sites will contribute more than that further away. The SAMM strategy provides a framework and broad approach that ensures in-combination effects of housing can be addressed and that all nine planning authorities within the defined zone of influence are working together to a consistent, agreed approach.

- 1.1 This Strategic Access Management & Monitoring (SAMM) Strategy has been jointly prepared by the nine planning authorities within the defined 13.8km 'zone of influence' from the boundary of the New Forest's internationally designated sites. The Strategy has been prepared in liaison with Natural England and Forestry England and is designed to complement the mitigation measures being delivered by individual planning authorities within their own administrative areas, which typically focus on new and enhanced greenspace provision (including Suitable Alternative Natural Greenspace (SANG)). This Strategy ensures the overall package of mitigation includes measures within the New Forest's designated sites, in recognition of the fact that new greenspace alone will not deflect all recreational pressures arising from planned new development.

New Forest SAC/SPA/Ramsar - overview of designations

- 1.2 The New Forest is one of the largest tracts of semi natural vegetation in the country and is one of our most important wildlife sites. The area hosts three international wildlife designations – the New Forest Special Protection Area, Special Area of Conservation and Ramsar.
- 1.3 The New Forest is classified as a **Special Protection Area (SPA)** for its breeding and overwintering bird species of European importance, in accordance with the European Birds Directive. The designation relates to internationally significant breeding populations of Dartford Warbler, Nightjar, Woodlark, Honey Buzzard, Hobby and Wood Warbler and overwintering Hen Harrier.

- 1.4 The New Forest is also designated as a **Special Area of Conservation (SAC)** for its habitats and non-avian species of European importance. This designation reflects the unique mosaic of habitats across the New Forest, which includes eight Annex 1 habitats (encompassing heathland, grassland, woodland, wetland, bog and open water), together with three Annex 2 species - Stag Beetle, Southern Damselfly and Great Crested Newt.
- 1.5 Also relevant is the New Forest's listing as a **Ramsar site**, under the Ramsar Convention. This recognises the international importance of the site as a wetland, supporting wetland flora and fauna of international importance, and adding to the global network of Ramsar wetlands.

Recreational uses of the New Forest – impacts and benefits

- 1.6 The New Forest National Park was designated in 2005 and encompasses the whole of the New Forest SAC, SPA and Ramsar designations. The New Forest is the most intensively visited of the UK's 15 National Parks and also has the highest concentration of internationally designated wildlife sites of any of the UK national parks.
- 1.7 Visitor levels to the New Forest National Park are estimated to be over 15 million visitor days (RJS Associates Ltd., 2018). These visitors include local residents visiting for short visits directly from home, as well as those visiting from further afield that include day trippers and staying tourists. Not all of the 15 million visitor days are to the designated sites that comprise over half of the National Park. Visitor surveys of the New Forest SAC, SPA & Ramsar undertaken by Footprint Ecology in 2018/19 showed that for most people visiting the designated sites, dog walking (55%) or walking (26%) are the main recreational activities undertaken.
- 1.8 Within the New Forest SAC, SPA & Ramsar sites open access to many areas is a legal right. There are in excess of 30,000 hectares of unenclosed land where people can walk freely and this includes the heaths, woodlands and other habitats managed by Forestry England, the National Trust, Hampshire County Council and others. There are around 150 formal car parks that provide access onto the New Forest SAC, SPA & Ramsar sites.
- 1.9 A challenging issue for UK nature conservation is how to respond to increasing demand for access without compromising the integrity of protected wildlife sites. Visits to the natural environment have shown a significant increase in England as a result of the increase in population and a trend to visit the countryside more. As well as changing demand for access, the type of access is evolving. There is a strong body of evidence showing how increasing levels of access can have negative impacts on wildlife. Issues are varied and include disturbance, increased fire risk, contamination and damage.
- 1.10 The issues are not, however, straightforward. It is now increasingly recognised that access to the countryside is crucial to the long-term success of nature conservation projects. Access also brings wider benefits to society that include benefits to mental/physical health and economic benefits. Government policy is also promoting countryside access in general (e.g. through enhancing coastal access).

New Forest 'zone of influence' and the need for a strategic mitigation approach

- 1.11 Planned housing growth in the area surrounding the New Forest's internationally designated sites - as set out in respective local development plans of the relevant planning authorities - has been identified as having potentially harmful impacts on the nature conservation designations. A large volume of [background evidence](#) sets out the links between where people live and recreation use of the Forest and the impacts associated with such use.

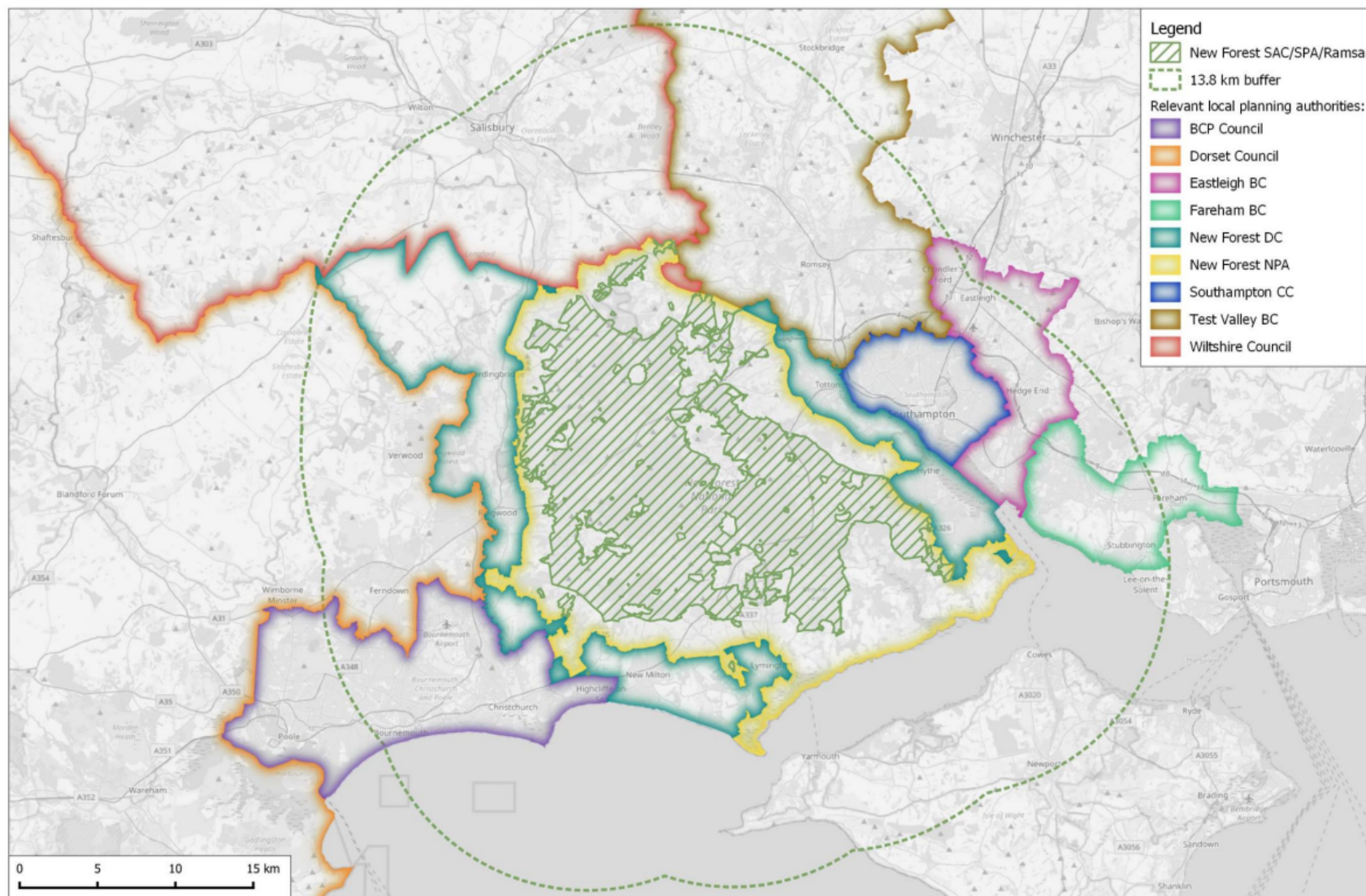
- 1.12 In order to ensure no adverse effects on the integrity of the New Forest SAC, SPA & Ramsar sites from new development, the surrounding local planning authorities have established a range of mitigation measures over the last decade. These include the provision of alternative natural greenspaces to deflect access, and some authorities (e.g. New Forest District Council, New Forest National Park Authority) have established measures within the designated sites of the New Forest, such as funding for an increased ranger presence.
- 1.13 In line with the extensive evidence studies and advice from Natural England, it has been recognised that housing growth within 13.8km of the New Forest SAC/SPA/Ramsar will have the potential to generate cumulative recreational impacts. This 13.8km zone (shown in Map 1 on the following page) encompasses a wide geographic area and spans multiple authorities. The zone has been defined using the same methodology as that adopted for other strategic mitigation schemes in the country (e.g. Bird Aware Solent) and defines the 75th percentile (derived from the straight-line distance from the interviewee postcode to survey location) to identify where the majority of visitors to the New Forest's designated sites originate from. Natural England have endorsed this methodology and further information is set out in the report on 'Discussion and analysis relating to the New Forest SAC/SPA/Ramsar and a zone of influence for recreation' (Footprint Ecology, 2021 and available [here](#)).

The need for a SAMM Strategy

- 1.14 This strategy has been prepared to ensure a comprehensive and joined up approach to mitigation across all relevant authorities (i.e. those that are within the 13.8km zone of influence). The alternative is that each local planning authority prepares a separate New Forest SAMM Strategy, which is inefficient and would not generate economies of scale in terms of the mitigation measures that can be delivered by working across local authority boundaries. **The provision of alternative recreational areas outside the New Forest's designated sites – including alternative natural greenspaces¹, enhancements to existing open spaces and improvements to recreational rights of way and other routes - designed to provide alternative destinations for recreation, local to where new housing is built, form a separate, discrete mitigation thread and are outside the scope of this strategy.** The delivery of local greenspace provision will remain the responsibility of the individual local planning authorities and this SAMM Strategy instead focuses on the mitigation measures delivered within the New Forest's designated sites themselves.

¹ This includes Suitable Alternative Natural Greenspace (SANG) and Alternative Natural Recreational Greenspace (ANRG).

Map 1: New Forest SAC/SPA/Ramsar and 13.8 km zone of influence.



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2. Policy background

The Habitats Regulations – precautionary approach and ‘in-combination’ tests

- 2.1 The designation, protection and restoration of European wildlife sites is embedded in the Conservation of Habitats and Species Regulations 2017, as amended, which are commonly referred to as the ‘Habitats Regulations’. Importantly, the most recent amendments (the Conservation of Habitats and Species (amendment) (EU Exit) Regulations 2019) take account of the UK’s departure from the EU.
- 2.2 The Regulations provide strict protection for European sites and this extends to local plans and development management decisions. Local planning authorities, as public bodies, are given specific duties as ‘competent authorities’. A competent authority should only approve a project or give effect to a plan where it can be ascertained that there will not be an adverse effect on the integrity of the European site(s) (or exceptionally, if there is overriding public interest and no alternatives). This approach is often referred to as the ‘precautionary approach’. The regulations also require competent authorities to consider both the cumulative impact of their decisions and the impacts of other relevant plans or projects – often referred to as the ‘in-combination’ test. Both of these legal principles support the preparation of a strategic, cross-boundary SAMM Strategy for the New Forest’s internationally designated sites.

Summary of national and local planning policy approach

- 2.3 The National Planning Policy Framework confirms that planning decisions should contribute to and enhance the natural environment by protecting and enhancing sites of biodiversity value in a manner commensurate with their statutory status. The NPPF also confirms that the presumption in favour of sustainable development does not apply where the plan or project is likely to have a significant effect on a habitats site (either alone or in combination with other plans or projects), unless an appropriate assessment has concluded that the plan or project will not adversely affect the integrity of the habitats site.
- 2.4 The National Planning Practice Guidance (NPPG) on [‘Appropriate Assessment’](#) confirms that all plans and projects (including planning applications) which are not directly connected with, or necessary for, the conservation management of a habitat site, require consideration of whether the plan or project is likely to have significant effects on that site. This consideration should take into account the potential effects both of the plan/project itself and in combination with other plans or projects. Where the potential for likely significant effects cannot be excluded, the competent authority must make an appropriate assessment of the implications of the plan or project for that site, in view of the site’s conservation objectives.
- 2.5 Where it cannot be concluded there will not be an adverse effect on a site’s integrity without mitigation, there is then a need to consider potential mitigation. Mitigation measures are protective measures forming part of a project and are intended to avoid or reduce any direct adverse effects that may be caused by a plan or project, to ensure that it does not have an adverse effect on the integrity of a habitats site(s). Any measures used to inform the decision about the effects on the integrity need to be sufficiently secured and likely to work in practice.
- 2.6 The local plans of the planning authorities in and around the New Forest have all been subject to Habitats Regulations Assessments (HRAs) and, where necessary, appropriate assessment. These legal assessments have highlighted potential impacts on the New Forest’s designated sites from increased recreational pressures associated with planned new development. There is

therefore a need to identify robust and deliverable mitigation measures to enable planned development to proceed, while ensuring the integrity of the designated sites is not impacted.

Summary of evidence base studies

- 2.7 Following the receipt of central Government funding, local planning authorities in and around the New Forest – liaising closely with Natural England – commissioned a series of research reports from the specialist consultants Footprint Ecology to understand the impacts of recreation arising from planned development on the New Forest’s international nature conservation designations and the potential for mitigation. These studies represent the most comprehensive survey of recreational use of the New Forest since 2004/5 when Tourism South East surveyed visitors to the area that became the National Park.
- 2.8 The following research reports on the recreational use of the New Forest have been published:
- [Results of a telephone survey with local residents report, Footprint Ecology \(2020\)](#): 2,000 telephone interviews with people living in and around the New Forest (within 25km of the designated area). 70% had visited the New Forest in the last 12 months, with walking by far the most popular recreational activity undertaken.
 - [New Forest vehicle counts report, Footprint Ecology \(2020\)](#): Counts of parked vehicles, on 15 dates spread through the year, at 270 parking locations across the designated area. Parking locations in central ‘tourist’ areas and in proximity to urban areas around the periphery were usually filled closer to capacity than those located elsewhere.
 - [New Forest Visitor Survey 2018/19 report, Footprint Ecology \(2020\)](#): Over 5,000 face-to-face interviews, and counts of people, at 60 car parks and other access points. For most interviewees the main activity undertaken was either dog walking (55%), or walking (26%). Dog walking was focused on the periphery of the New Forest SPA, SAC and Ramsar.
 - [Overview of visitor results and implications of housing change on visitor numbers report, Footprint Ecology \(2020\)](#): Nearly 130,000 new dwellings may be built within 25km of the New Forest SAC/SPA/Ramsar over the period to 2036. This would represent a 16.4% increase in housing within 25km. The research predicts this would result in an increase of around 11.4% in the number of visits to the New Forest’s designated sites.
 - [Impacts of recreation and potential mitigation approaches report, Footprint Ecology \(2020\)](#): A review of the impacts of people on designated sites; and an assessment of the relative effectiveness of a range of mitigation measures aimed at preventing such impacts.
 - [New Forest ‘Zone of Influence’ report, Footprint Ecology \(2021\)](#): Following the publication of the research reports in 2020, the planning authorities commissioned Footprint Ecology to undertake additional work relating to the ‘zone of influence’ of the New Forest’s designated sites. This follow-up work adopted methodology used in other strategic mitigation schemes in the country to define the catchment area within which new development would have an impact on the designated sites due to visitor pressure. Defining this catchment area provides a basis for the relevant planning authorities to seek mitigation for the recreational impacts arising from new development on the protected sites of the New Forest. Natural England endorses the conclusions of this and the earlier research reports and supports their use as the best available information.

- In late 2023 Footprint Ecology completed their final report on a recommended New Forest Strategic Access Management and Monitoring (SAMM) Strategy. The report sets out a framework and broad approach to ensuring in-combination effects of housing can be addressed and that all authorities are working together to an agreed approach. The report focuses on mitigation measures within the New Forest's designated sites, which will complement the package of measures being delivered by planning authorities within their own respective areas. Natural England has endorsed the report recommendations.

2.9 The research reports identify a range of potential impacts from the projected increase in visitors to the New Forest arising from the planned new development. A range of avoidance and mitigation measures are identified and the reports recommend that a strategic, proportionate and co-ordinated approach is developed, which will require partnership working across a range of local authorities and stakeholders. This work builds on the existing approach taken by local planning authorities to mitigation and ensure that authorities are working to a consistent evidence base. The production of this joint SAMM Strategy is a key element of this joint working, providing a consistent and equitable approach for planning authorities and developers within the defined 13.8km zone of influence.

Strategic Access Management and Monitoring measures (SAMM)

- 2.10 Strategic Access Management & Monitoring measures are employed within internationally designated nature conservation site across the country. SAMM strategies focus on measures within the designated sites and typically complement the provision of additional greenspace (e.g. SANG) and enhancements to existing green infrastructure (e.g. rights of way) taking place outside the designated sites to form an overall package of mitigation measures.
- 2.11 The overall aim of the SAMM package is to comply with the Habitat Regulations by ensuring that adverse effects on integrity from recreational use associated with plan-led housing growth can be ruled out, alone or in-combination. This can be achieved through redistributing access in time or space; and changing visitor behaviour to reduce and avoid impacts.
- 2.12 The SAMM measures identified for the New Forest are broken down into three broad themes:
- Access infrastructure and projects;
 - Engagement; and
 - Monitoring

3. Scale of projected growth

Indicative estimates of housing change

- 3.1 Research undertaken by Footprint Ecology drew on data provided by the local planning authorities in the vicinity of the New Forest to estimate that anticipated levels of new housing could be around 129,222 new dwellings over the period 2018 - 2036 within a 25 kilometre radius of the New Forest SAC, SPA & Ramsar. This was equivalent to a 16.4% increase in the number of dwellings and could potentially generate (assuming visit rates per dwelling were to remain constant) around 11.4% more visits to the New Forest SAC, SPA & Ramsar.
- 3.2 More recent housing data have been provided by the relevant local planning authorities to inform this SAMM strategy. This data provides a snapshot of possible future growth from 2023 through to 2036 that would require mitigation (i.e. excluding planned development where mitigation for impacts on the New Forest's designated sites has already been secured). These estimates of housing growth are indicative, as each authority is at a different stage in their plan making and for those whose local plans are still at an early stage, the figures represent a best estimate at this point in time. In addition, there remains some uncertainty nationally regarding housing targets for local planning authorities. Totals within 13.8km of the New Forest SAC, SPA & Ramsar are summarised in Table 1 and indicate an overall total of around 45,000 net new dwellings in the period to 2036 within the defined zone of influence.

Table 1: Approximate number of additional dwellings within 13.8km of the New Forest SPA/SAC/Ramsar to 2036, by local planning authority, requiring mitigation.

LPA	Approximate numbers of dwellings likely to come forward by 2036 and requiring mitigation
BCP Council	10,313
Dorset Council	3,144
Eastleigh Borough Council	6,663
Fareham Borough Council	2,572
New Forest District Council	3,204
New Forest National Park Authority	260
Southampton City Council	14,464
Test Valley Borough Council	1,650
Wiltshire Council	2710
Total	44,980

Role of alternative greenspace provision as a complementary measure

- 3.3 The housing figures provide an indication of the scale of change that requires mitigation. Some of the growth will be accompanied by strategic SANG (or, in the case of the New Forest District Council, Alternative Natural Recreational Greenspace 'ANRG') directly linked to planned development. As such this SAMM strategy does not need to address all the recreation impacts associated with the overall quantum of growth, as SANG will provide some of the mitigation. There is however a recognition that new greenspace provision alone is unlikely to fully mitigate increased recreational pressures on the New Forest's designated sites (given the scale and draw of the designated sites). SAMM measures within the designated sites therefore form an important part of the overall recreation mitigation package, complementing new greenspace provision associated with planned new development.

4. Current mitigation and access management measures in place in the New Forest

- 4.1 Recreation has been managed in the New Forest for many decades. In 1972, following the development of a conservation plan (New Forest Joint Steering Committee, 1971), the current network of 147 formal car parks was created and cars were stopped from driving across the lawns and open land. In addition there are over 100 miles of designated off-road cycle tracks and a range of promoted walking routes in the New Forest. In the early 1990s the 40mph speed limit on unfenced roads was introduced within the Perambulation of the Forest. Partner authorities are clear that the SAMM measures set out in this mitigation strategy which focus on the impacts of new development need to fit with existing and planned visitor management.

New Forest Recreation Management Strategy

- 4.2 The New Forest National Park Recreation Management Strategy sets out a strategic direction for the management of outdoor recreation in the New Forest National Park from 2010 – 2030. It is important to emphasise that this strategy plays a wider role than that required to mitigate the impacts of recreation on the SPA, SAC and Ramsar sites arising from new development. The Recreation Management Strategy is much broader in its aims and relates to people visiting from anywhere, including people on holiday.

Existing mitigation frameworks

- 4.3 The majority of the planning authorities within the defined 13.8km 'zone of influence' from the New Forest's designated sites have established recreation mitigation approaches in place. Some of these are adopted as Supplementary Planning Documents and some are interim strategies. It is anticipated that elements of these will no longer be required following the publication of this joint SAMM Strategy, with other non-SAMM elements (e.g. greenspace provision within the administrative area of the planning authorities) retained. This will be clarified by each relevant local planning authority.

Other elements of visitor management

- 4.4 Many activities that take place within the New Forest are also covered under local byelaws (which are relevant on National Trust and Forestry England land) and all the main landowners require official permission for many activities (including commercial and non-commercial groups events). On the Crown Land of the New Forest, relevant activities that require permission range from organised races and charitable events to scientific study. Forestry England encourage groups to apply for permission and organise activities and events formally, as this ensures there is a good understanding of what is taking place and a system for appropriate management and control has been established. This ensures that more organised activities and events are not relevant to this SAMM Strategy as mitigation is already in place. The SAMM Strategy instead focus on the impacts of planned new development and enables the planning authorities to discharge their legal responsibilities as 'competent authorities'.

5. Strategic Access Management and Monitoring (SAMM) package

- 5.1 Local planning authorities within the ‘zone of influence’ – liaising with Natural England – are clear that mitigation measures are required within the New Forest’s internationally designated site to complement measures being taken within the local authority administrative areas. The latter includes greenspace provision and enhancements (i.e. SANG-type measures) and these will continue to play an important role as part of the package of mitigation measures.
- 5.2 The implementation of a SAMM package ensures a range of mitigation measures are delivered to protect the integrity of the New Forest’s designated sites from the pressures of increased recreation arising from new development. The overall aim of the SAMM package is to comply with the Habitat Regulations by ensuring that adverse effects on integrity from recreation use associated with Plan-led housing growth can be ruled out, alone or in-combination.
- 5.3 The SAMM measures identified for the New Forest are broken down into three broad themes: (i) access infrastructure and projects; (ii) engagement; and (iii) monitoring. These measures have been selected based on the level of housing growth and scale of mitigation necessary. They are also consistent with SAMM packages delivered elsewhere in the country. Further detail of the measures to be delivered under each of these themes is set out in Appendix 1.

Project Manager

- 5.4 A Project Manager post will be required to oversee the mitigation work, keep the delivery on target, liaise with delivery partners, local authorities and stakeholders. The Project Manager will need to be a full-time post for the initial years of the strategy, particularly while the access infrastructure changes are taking place. In the long term it may be possible for the post to drop to a part-time role.

Table 2: Access infrastructure and projects

Access infrastructure and projects	
Element	Description
Parking	- The current distribution of the 140+ car parks within the New Forest’s designated sites was established in the 1970s and the number of car parks, their distribution and the number of spaces they provide does not reflect what would be necessary if they were implemented from scratch now. The current situation does not focus recreational use in the more robust locations and does not necessarily fit well with the robust path and tracks network. - There is an opportunity to adjust or relocate existing parking provision within sensitive locations to more environmentally robust locations that can sustain recreational visitors, whilst limiting detrimental impacts on the rare habitats and species of the Forest. - Forestry England, working with the National Park Authority and other partners, are developing a spatial plan that sets a trajectory to fundamentally shift parking provision within the New Forest. It is anticipated that the plan will result in an overall reduction in the overall area of land used for parking, a

	reduction in the number of locations where parking is possible while retaining the same number of parking spaces. While existing work has already taken place on the spatial plan, further work is required. Costs are therefore included within this SAMM Strategy to assist with implementation of the spatial plan. Given the current uncertainty around what will be in the spatial plan an indicative sum is allocated towards this element of SAMM and this will need revision over time.
Gateway projects	- There may be opportunities for the provision of additional access facilities connected to the New Forest SAC, SPA & Ramsar which lie outside the European site boundary. Opportunities include adjacent farmland, paddocks or other land with no current public access and which could be made accessible, with the potential to set parking back and off the New Forest SPA, SPA & Ramsar and to provide dedicated areas for dog walking or other activities. - No specific cost has been allocated to such provision and it remains an option for local authorities to bring forward such measures through their own mitigation strategies for areas outside the New Forest's international nature conservation designation. Should opportunities arise, there could be scope to review the mitigation budget and reallocate monies if there is demonstratable mitigation benefit. These measures could also be part of the SANG component for relevant authorities.
Paths and tracks	- Maintenance of paths and tracks is a component in directing visitors and focusing use, helping to ensure visitors stick to the robust path network. Works on paths will link to the recreational spatial plan, and the car parks where use will be focused will need to have suitable path provision directly from the car park. - All maintenance work and any new sections of path would need to be undertaken sensitively to ensure use of appropriate materials and avoid any net loss of habitat. A range of key species depend on path/track edges and bare ground and any work will therefore need to be carefully planned and fit with the species and habitats present. Appropriate signs/waymarkers may also be required to direct visitors.

Table 3: Engagement

Engagement	
Element	Description
Ranger provision	A mobile ranger team is a key component of strategic mitigation schemes such as those on the Solent, the South-Devon sites, the Thames Basin Heaths and the Dorset Heaths. In these areas the rangers form a mobile team that spend the majority of their time outside, talking to visitors, influencing how visitors behave and showing people wildlife. They also have a role in educating visitors, schools and other groups and so their role is wider than warden-type rangers. In these examples the ranger team is a discrete body whose purpose

	is mitigation delivery (rather than routine management, maintenance, membership recruitment or other such tasks). • Ranger time can be targeted to particular locations (e.g. around the periphery, car parks where particular uses or issues occur etc). Rangers can focus where there are particular concentrations of breeding or roosting birds or other sensitive wildlife. • In the long term the best approach will be to have a dedicated ranger team with a mitigation role that is clearly distinct and separate from other work streams. The National Park Authority People and Wildlife Ranger post (as funded by developer contributions in New Forest District Council) provides a potential model. This will ensure transparency, provide a clear separation from other duties of the delivery organisation and ensure consistency. In the short term the existing New Forest ranger forum will play a key role and close collaboration and shared working practices will be important. • A realistic approach is to initially aim for an increased ranger team of around 5 full-time staff; and for these roles and the scale of the team to be reviewed periodically. The role and need for ranger time is likely to change with time, for example as the number and distribution of car parks shifts. • The ranger team needs to be adequately resourced and this should include mobile information provision, printed material and social media content/support. The existing New Forest Code has been widely promoted and updated and has been widely distributed, but there is scope to increase how this is promoted, used and ensure it remains high profile for all visitors.
Targeted work with dog owners	• Dogs can cause particular issues in terms of contamination, disturbance and livestock worrying within the designated sites. Influencing dog walkers should be a target for mitigation delivery given the extensive use of the New Forest by dog walkers (over 50% of visitors to the designated sites are dog walkers). • The National Park Authority has already been working with the New Forest Dog Owners Group and have been running events. These could be extended, and 2 dog focussed posts are included in the SAMM Strategy to run regular guided walks, promote SANGs and areas for dog walking. In the longer term, working with relevant partners, there is the potential to establish a dog project, potentially learning from projects at other heathland sites such as Dorset, South-east Devon and the Thames Basin Heaths. There is also scope to link with the work being undertaken by Bird Aware Solent (who also have staff with a dog focus).
Fires	• Wildfire is an increasing concern with climate change. Access associated with recreational use of the designated sites plays a role in increasing the risk of fire (through barbeques, campfires, discarded cigarettes etc). • Due to the scale and changing risk from fires the SAMM Strategy includes elements to help address the additional risks from increased recreational use. A wildfire forum or some level of proactive co-ordination between partner agencies will increase awareness among staff and ensure all are prepared.

	Resources could also be used to support increased training and equipping of staff, for example through bringing in specialists to run training, review procedures and work with partners.
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Table 4: Monitoring

Monitoring	
Element	Description
Visitor monitoring	- Monitoring is required to help inform mitigation, confirming efficacy or highlighting where additional measures or changes are required (e.g. focussing ranger time at key locations). Monitoring also plays a key role in furthering understanding about changes to recreation behaviour and how this may be impacting key biological features of the forest. - Visitor numbers can be quickly and effectively monitored by conducting regular vehicle counts at all of the forest car parks. This would be done through driving a set route around the Forest on several dates through the year, counting the number of parked vehicles at each parking location. To be repeated every 2/3 years to pick up changes over time. This would provide a metric for understanding levels of recreational use at different points through the year as well as identifying longer term trends in where visitors are going, feeding into the spatial plan and how ranger time is targeted to different locations. - Face-to-face visitor interviews carried out on-site would provide more detailed information on where visitors are coming from, how often they visit, where they go and their awareness of the Forest's ecology. This data will identify any changes in visitor patterns and behaviour over time and can be used to assess the effectiveness of mitigation measures, informing future delivery.
Vegetation communities, key habitat features and species	- Any impacts of changes in recreational pressure and behaviour identified through visitor monitoring could be measured at 20 locations. Monitoring to include sampling vegetation in specified habitats; systematically recording visual signs of damage, deterioration or contamination linked in access; changes in key habitat features; and changes in breeding bird populations (e.g. within 1km of key locations, using standard methods). - Biological monitoring should be informed by local site knowledge working with the land manager's ecologists to ensure that the relevant features/habitats are selected for monitoring at each site. It should take into account any changes in management (e.g. prescribed burns, scrub management, habitat restoration etc. also changes to infrastructure e.g. car park surfacing or drainage). Timing should be reviewed, but every three years will be the initial approach. The monitoring of this strategy will supplement the existing monitoring of condition status and features already undertaken in the New Forest.

	• Biological monitoring should be reactive to how recreational behaviour changes and any external pressures that affect the designated sites. Its appropriateness and relevance should be agreed annually by partners. • The results from the different strands of monitoring will be used to assess changes in recreation impacts and inform further monitoring and mitigation measures.
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Alternatives

- 5.5 As an alternative to making a contribution to this SAMM strategy, applicants may wish to consider the potential impacts on the New Forest's designated sites and propose their own appropriate measures for assessment. Applicants will need to provide sufficiently detailed evidence about the potential ecological impacts of their proposed development on the designated features, species and habitats of the protected sites and their proposed mitigation measures to demonstrate certainty of avoiding adverse effects in order to pass the appropriate assessment. It must be demonstrated conclusively that the bespoke mitigation measures will comply with the Habitat Regulations and there will be no likely significant adverse recreational effects on the designated sites.
- 5.6 Some proposed developments within the 'zone of influence' (due to their scale, type, or proximity of the proposed development in relation to the designated sites) will need to consider their 'alone' impacts on the designated sites. A contribution to this SAMM strategy may not be able to offset all the likely adverse impacts for these developments and applicants will need to engage at an early stage with their local planning authority and Natural England.

6. Implementation

Developer contributions and in perpetuity costs

- 6.1 Mitigation is secured for the duration of the impact and it is assumed the strategy will run for as long as it is required, adjusting as necessary to changing levels of house building and the impacts arising. Adjustments may also be made in response to the monitoring of the implementation of the strategy.
- 6.2 This SAMM mitigation strategy is based on the recommendations in the 'New Forest SAMM Strategy', Footprint Ecology 2023. As per this report, costs have been calculated to cover costs in the long term, with some measures involving implementation over many years (up to 80 years in total). This is considered to be 'in perpetuity' for the purposes of this strategy.

Per dwelling tariff

- 6.3 The cost of the SAMM mitigation package is around £21,628,060. The zone of influence is broad and encompasses a wide area and within the zone of influence there are around 45,000 new dwellings anticipated by 2036 that will require mitigation. Given the scale of the zone of influence, and the effect of Southampton Water, visit rates to the New Forest from housing in different local authorities vary, and in particular development that is close to the New Forest is likely to generate a much higher level of recreation use. This SAMM Strategy therefore adopts an approach whereby development closer to the designated sites – which generates more recreational visits per annum – is required to make a different contribution from development towards the outer parts of the zone of influence. Such an approach is supported

by the visitor data and ensures the contributions are fairly and reasonably related in scale and kind to the development – one of the key tests in paragraph 57 of the NPPF (December 2023).

- 6.4 Using the data from the visitor survey in 2018/19 (Footprint Ecology), this SAMM Strategy is based on visit rates per local authority and this is used to apportion tariffs per local authority. This means that the per dwelling tariffs set out below are proportionate to the likelihood that a resident from that authority might visit the New Forest SPA, SAC & Ramsar. Having derived a figure for each authority the contributions have been simplified, with a set value for the two closest authorities (£2,700 per dwelling) and for all other authorities the tariff has been established by rounding up to the nearest £100 (Table 4).
- 6.5 The New Forest SAMM contribution tariffs will need to be inflation linked and adjusted annually. Each local authority will also need to add any relevant administrative costs and there is also the potential for each authority to vary the tariff according to dwelling type (e.g. flats vs houses) or number of bedrooms as is relevant to the authority. In those cases, adjustments may be necessary to ensure the overall required funds are collected. At this stage it is proposed that the SAMM contributions will be set on a 'per dwelling' basis. Addressing the impacts of new development on internationally designated sites is a matter of legal compliance and therefore considerations around development viability are unlikely to be engaged.

Table 5: Summary of visitor data, levels of housing growth anticipated for each authority that will require mitigation and the tariffs per authority

Local Planning Authority	Interviewees from home in original survey and within 13.8km (%)	Number of interviewees in original survey per 1000 dwellings 'visit rate'	Potential amount of housing needing to be mitigated (%)	Suggested per dwelling tariff	Overall contribution per authority based on suggested tariff and level of housing needing to be mitigated
New Forest National Park	874 (23)	56.0	260 (1)	£2,700	£702,000
New Forest District	1781 (48)	26.2	3204 (7)	£2,700	£8,650,800
Test Valley	154 (4)	6.3	1650 (4)	£700	£1,155,000
Wiltshire	147 (4)	5.8	2710 (6)	£600	£1,626,000
Dorset	108 (3)	3.9	3144 (7)	£400	£1,257,600
Southampton	268 (7)	2.5	14,464 (32)	£300	£4,339,200
BCP	290 (8)	2.4	10,313 (23)	£300	£3,093,900
Eastleigh	84 (2)	1.7	6663 (15)	£200	£1,332,600
Fareham	25 (1)	0.7	2572 (6)	£100	£257,200
TOTAL	3731 (100)		44,980 (100)		£22,414,300

Types of development

- 6.6 This strategy applies to future development, including those granted planning permission and coming forward via permitted development rights, that results in a net increase in residential accommodation (i.e. C3 Use Class), located within 13.8km of the New Forest SAC, SPA & Ramsar.
- 6.7 The potential for large sites over 200 dwellings beyond the 13.8km zone of influence and up to 15km to have an adverse impact is recognised. Reflecting the precautionary principle, this impact will need to be assessed on a case-by-case basis. This assessment will take into account site-specific factors including the characteristics of the development proposal, both on-site and off-site mitigation measures as well as ease of access to the New Forest. Specific local planning authorities may identify lower thresholds for large sites in this zone taking account of specific circumstances.

- 6.8 Natural England's advice concerning adverse impacts arising from a phased development / allocation may be considered as final for subsequent phases where the overall parameters (residential dwelling number and type) of the development / allocation remain consistent at the time the advice was provided. The advice may be reviewed in the light of material changes – for example to the scale of the proposal or where updated or new evidence is available.
- 6.9 While the SAMM Strategy is focused towards C3 Use Class development, there are other uses and forms of development that may have impacts from recreation, such as:
- Houses in Multiple Occupation (sui generis);
 - Residential institutions within the C2 Use Class where the residents are not severely restricted by illness or mobility;
 - Student accommodation;
 - Sites for gypsy, travellers and travelling showpeople;
 - Tourist accommodation, including self-catering, caravan and touring holiday accommodation
- 6.10 For the above types of development, this SAMM Strategy provides a means of ensuring effective mitigation can be delivered, but each will need to be assessed on a case-by-case basis. While in general each unit for the above could be considered a single dwelling, there may be a need to adjust the rate of SAMM contribution for different types and off-site infrastructure provision will need to be considered on a case-by-case basis. For example, the SAMM rate could be adapted according to occupancy rates for tourist accommodation. Project level HRA for tourist applications will need to consider the location and type of use with respect to the New Forest, as for example a city centre hotel in Southampton would have a very different impact compared to a campsite around the periphery of the New Forest. Early consultation with the local planning authority and Natural England is advised where there is a level of uncertainty concerning potential adverse impacts.

Overlaps with other mitigation strategies

- 6.11 There are a number of other established mitigation strategies with a SAMM contribution that overlap the New Forest's 13.8km zone of influence. For example the 5km zone of influence for the Dorset Heaths covers BCP and part of Dorset Council areas; while the Solent mitigation strategy covers all areas within 5.6km of the relevant Solent European sites and this includes parts of New Forest District, New Forest National Park, Test Valley Borough, Southampton City, Eastleigh Borough and Fareham Borough.
- 6.12 As a general point of principle it is assumed that new development within the relevant zones of influence will need to contribute towards each different SAMM package, as the measures relate to different sites and issues. For example, a SAMM contribution towards the Dorset Heathlands will not fund additional ranger provision in the New Forest. While there might be some areas of overlap (e.g. around education work or awareness raising about fires on the Dorset Heaths and New Forest), the messages and issues are not directly equivalent and it cannot be assumed that measures designed for one site will work in the same way for another.
- 6.13 New green infrastructure and SANG could however potentially work for multiple European sites and there may not necessarily be a need for development to contribute or deliver multiple SANG sites. This is a matter for developers to discuss with their relevant local planning authority and Natural England at an early stage in the application process.

Governance

- 6.14 Certain elements within the SAMM mitigation package have the scope to adapt and flex as conditions and priorities change. Furthermore, it is possible that additional opportunities may arise, for example as a result of changing land ownership. It is important therefore that the governance is flexible and responsive enough to enable developer contributions to be shifted to different components of the strategy easily. Annual reviews of budgets and the ability for the Project Manager to adjust finances as appropriate (with rapid approval) will be key. Periodical adjustments to the level of contributions sought as a result of inflation and associated increases in both staff and materials costs will be required.
- 6.15 A key element of this New Forest SAMM Strategy is the importance of the various delivery partners who will need to undertake the SAMM measures. The Project Manager will oversee the commissions with these bodies, in line with authorisation from an oversight group comprising representatives from the local authorities. This approach is summarised below and will allow flexibility as priorities change, as the Project Manager can liaise directly with the delivery partners and gain necessary authorisation via the oversight group.

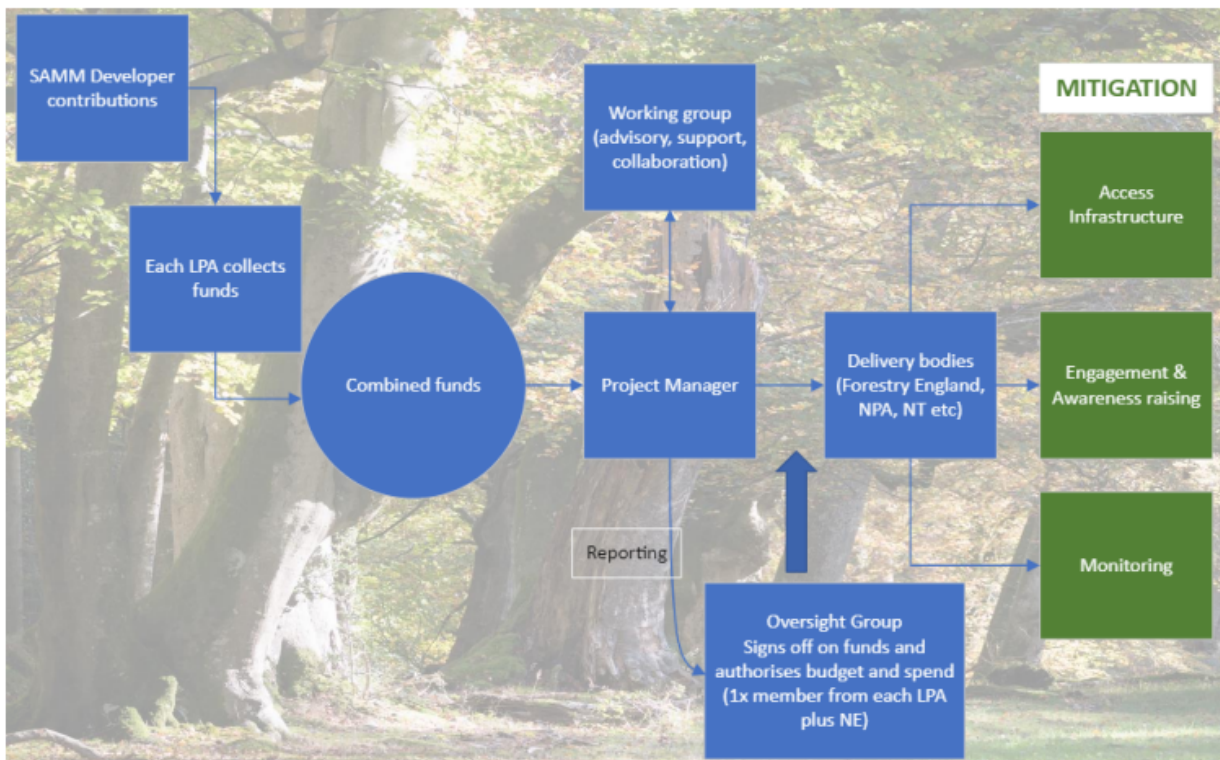


Figure 1: Overview of governance

Strategy review and monitoring/reporting

- 6.16 This SAMM strategy will be comprehensively reviewed and updated on a 5-year basis, providing the opportunity to adjust the key measures and overall approach. In the interim, annual reviews of the budget and adjustments will be necessary. **Measures (such as ranger provision) can be scaled up or down and phasing of implementation adjusted, as necessary, to accommodate changes in the volumes and distribution of housing.**

Appendix 1 – Breakdown of SAMM costs

Mitigation measure	One-off/Capital cost	Rolling cost	Multiplier for rolling cost	Total cost	Notes on how cost calculated
Redistribution of parking	£1,200,000			£1,200,000	Notional figure of £1m for works and £200,000 for design work, planning and assessment work. Spend would need to be spread over different years. Once established maintenance costs covered by Forestry England (as currently)
Robust tracks network improvements	£280,000			£280,000	Notional figure as precise details of works required to be established alongside spatial plan and car park works. Costs assume some changes to paths with around £100 per sq m for unbound paths and estimate of total length 2km. Plus 200m of board walks at £150 per sq m and 10 5m bridges at £5000 each. Costs likely to need to be spread over a number of years.
Path maintenance		£15,000	80	£1,200,000	Small annual budget to ensure paths and tracks maintained for recreation and addressing localised issues - could cover gates, path/track surface etc. Approx. £15 per sq m depending on type of maintenance / repair and an estimated 1000m of repairs per year. Potential for spending to vary with years and be pooled.
Verge parking	£50,000			£50,000	Notional cost to contribute towards low wooden posts, ditches, printed material etc, as required
Waymarking		£20,000	5	£100,000	Small budget for some additional markers and posts etc as required. Cycle route marker posts around £100 per post
Project Manager post		£59,000	50	£2,950,000	£40,000 annual salary, plus 35% (to cover NI, superannuation, etc.) and £5000 per annum support costs. Costed for 50 years on expectation of 10 years full time and around 70 years part time
Enforcement of PSPOs	£10,000			£10,000	budget to contribute towards training and other costs
Dog walking engagement officers		£90,656	10	£906,560	£27,000 annual salary, plus 35% (to cover NI, superannuation, etc.) and £15000 per annum support costs (to cover promotional material, transport etc). 2 posts for 10 years.
Increased ranger time		£201,640	50	£10,082,000	5 fte equivalent posts with costs extended to cover 50 years. £27,000 annual salary, plus 35% (to cover NI, superannuation, etc.) and £5000 per annum support costs. Some ranger provision potentially required in-perpetuity however team can shrink over time as SANGs and infrastructure changes become relevant. 50 years for 5 posts gives potential for size of team to be regularly reviewed and potential for it to shrink or expand (in short term) as priorities require and ensure in perpetuity coverage.
Ranger training and collaboration		£2,500	5	£12,500	Annual budget to fund joint training, facilitation etc. Short term as in longer term potential to ensure clearer divides in responsibility and roles

Mitigation measure	One-off/Capital cost	Rolling cost	Multiplier for rolling cost	Total cost	Notes on how cost calculated
Ranger resources (vehicles)		£9,950	80	£796,000	£32,000 EV purchase, replaced every 10 years, £1500 for livery, £2000 p.a. insurance, 5000 miles p.a. at 0.25p per mile electricity. Assumed to be rolling annual cost for 2 vehicles.
Wildfire forum		£5,000	10	£50,000	Flexible resource to allow specialist training, strategy support, collaboration between organisations and awareness raising among staff of risks. Relatively short term (20 years) as increased ranger provision and spatial plan will reduce risks in long term.
NF destination website	£10,000	£2,000	80	£170,000	budget to contribute to updates and material online
Mobile Display Unit	£25,000	£7,500	80	£625,000	rolling cost assumes £5000 annual cost for mileage, insurance etc. And £2500 for replacement/overhaul on 10 year basis
Comms campaigns post		£40,800	10	£408,000	£3400 per month to cover salary and support costs. Costed for 10 years as engagement and awareness raising measures should potentially be able to be stepped back once infrastructure changes established
Educational campaign material (NF code signs, leaflets etc)		£13,000	80	£1,040,000	£13000 per year, rolling cost
Marketing budget for social posts/film creation		£5,000	10	£50,000	rolling budget for 10 years to fit with campaign comms post
New camera/video equipment	£3,000			£3,000	1 off expenditure identified
Long term visitor monitoring - vehicle counts		£20,000	40	£800,000	Estimated cost for survey carried out by a consultancy, including analysis and reporting. Based on 15 counts through the year, repeated every 2 years for 80 years.
Long term visitor monitoring - visitor interviews		£40,000	11	£440,000	Estimated cost for survey carried out by a consultancy, including analysis and reporting. Based on 20 survey locations with 4 days spent at each. (e.g. 2 days in autumn and 2 days in spring) . Costed for repeat surveys every 3 years for 30 years – however interval could be extended to allow coverage over longer time window
Incident log of livestock worrying (dogs), petting		£1,000	20	£20,000	Rolling small budget to ensure data collected and maintained. May need more in early years to establish online recording system
Monitoring changes in impacts to vegetation at key recreation locations (including, but not limited to, car parks)		£25,000	5	£125,000	Assumption of survey fieldwork involving around 2 person days per location. Costs to cover 5 pulses in total, allowing repeat monitoring over extended period to determine change following implementation of spatial plan and other interventions.

Mitigation measure	One-off/Capital cost	Rolling cost	Multiplier for rolling cost	Total cost	Notes on how cost calculated
Monitoring changes to key features at key recreation locations (including, but not limited to, car parks).		£27,000	5	£135,000	Assumption of around 2 person days of monitoring time per location and 20 locations, with additional time for set up. Costs to cover 5 pulses in total, allowing repeat monitoring over extended period to determine change following implementation of spatial plan and other interventions.
Monitoring changes in breeding bird populations at key recreation locations (including, but not limited to, car parks).		£30,000	5	£150,000	Assumption of survey involving around 3 visits to 20 survey locations and a day per visit per location. Costs to cover 5 pulses in total, allowing repeat monitoring over extended period to determine change following implementation of spatial plan and other interventions.
Narrative of change		£5,000	5	£25,000	Desk-based study to bring ecological and visitor results together and provide narrative. Assumption of around 8 person days consultancy time
Total				£21,628,060	