

**FOREST VISITOR
SURVEYS
2002
Summary Report**

**Harvey Snowling
Economics & Statistics
Forestry Commission
October 2004**

CONTENTS

1. INTRODUCTION.....	3
2. SUMMARY OF LOCAL VISITOR SURVEYS.....	5
3. LOCAL VISITOR SURVEYS	13
3.1. SCOTLAND.....	13
BORDERS, GLENTRESS.....	13
GALLOWAY FOREST PARK	14
TREEFEST.....	15
3.2. ENGLAND	16
NORTH WEST ENGLAND, WHINLATTER & DODD WOOD.....	16
NORTH WEST ENGLAND, DELAMERE FOREST PARK.....	17
WESTONBIRT	18
3.3. WALES.....	19
COED Y CYMOEDD, CWMCARN	19
COED Y CYMOEDD, GARWNANT.....	20
COED Y GORORAU, COED MOEL FAMAU.....	21
COED Y MYNEDD, NANT YR ARIAN	22
WALES MOUNTAIN BIKING.....	23
COED Y GORORAU, COED SARNAU.....	24
4. OTHER SURVEYS.....	25
4.1. VISITOR MONITORING PILOT	25
NEW FOREST & INVERNESS	25
4.2. FOREST HOLIDAYS.....	26
CAMPSITES	26
CABINS	27
4.3. GB DAY VISITS SURVEY 2002-03.....	28

1. INTRODUCTION

Between 1995 and 2001 the Forestry Commission co-ordinated a National Programme of visitor surveys across Great Britain, focussing on larger sites, often with visitor centres. In 2002, this programme ceased to operate. A new visitor monitoring system was piloted in 2002. This was aimed primarily at providing a more accurate estimate of the number of visits to woodland managed by the Forestry Commission, whilst continuing to gather information regarding the profile of visitors. New methods of measuring the quality of visitor experience were also researched. The new visitor monitoring surveys began operating in Wales and Scotland in 2004, with first results expected in 2005. Quality of experience surveys began in England in 2003, with results from three sites being published in 2004.

In the period between the end of the National Programme and the release of results from the new visitor monitoring system, information on forest visitors is provided by local surveys, carried out when required by forest district management.

In 2002, visitor surveys were carried out at twelve forest sites (see map on the following page). These surveys addressed local management issues, with questionnaires being designed to obtain information that varied from site to site. As a result, there are only a handful of questions common to each survey.

Section 2 of this report presents a summary of common data obtained from the twelve Forestry Commission visitor surveys that ran in 2002.

Section 3 of this report gives the main findings from each of the twelve local visitor surveys that were carried out in 2002.

Section 4 gives details of other surveys carried out in 2002 that provide information about forest visitors.

For more information about this or other visitor survey work please contact Forestry Commission Statistics at the address below.

Contacts:

Harvey Snowling
Economics & Statistics
Forestry Commission
231 Corstorphine Road
Edinburgh
EH12 7AT
Tel: 0131 314 6218
Fax 0131 316 4344
Email: statistics@forestry.gsi.gov.uk

Map showing sites where forest visitor surveys were carried out in 2002¹



¹ The survey of Treefest visitors was carried out at events in forests around Scotland, while surveys at Galloway Forest Park, New Forest and Inverness took place at various locations within the forest park or forest district.

2. SUMMARY OF LOCAL VISITOR SURVEYS

This summary presents overall results from the twelve Forestry Commission local visitor surveys that ran in 2002 (see section 3 for details). The surveys covered a total of 2,077 responses. The locations of the survey sites in these districts are shown in the map on the previous page. The sites are not representative of all FC visitor sites, so the visitor composition may not be typical of all FC sites.

Table 1: Numbers surveyed at each site

	Interviews	Visitors	Average group size (excl. groups of 10 or more)
Galloway Forest Park	443	1109	2.3
Coed Moel Famau	327	935	2.6
Delamere	208	989	2.8
Treefest	193	822	3.2
Moel Sarnau	179	501	2.6
Nant yr Arian	147	499	3.2
Wales Mountain Biking	143	600	3.3
Cwmcarn	108	237	2.1
Glentress	107	408	3.0
Westonbirt	105	454	4.3
Whinlatter/Dodd Wood	65	149	2.3
Garwnant	52	131	2.5
Total	2,077	6,834	2.8

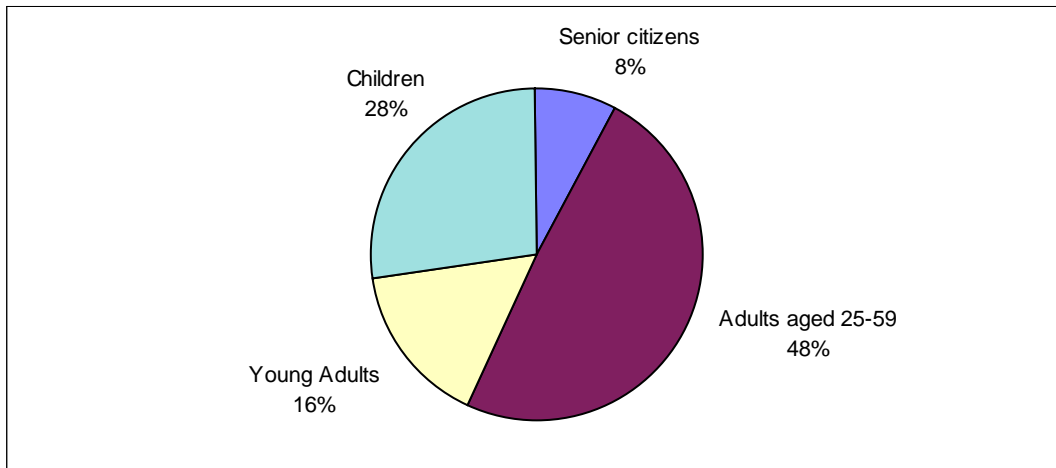
Results should be interpreted with caution when sample sizes are small.

Group composition

There were 6,834 visitors in the 2,077 groups interviewed (see Table 1). Excluding groups of 10 or more, the average group size was 2.8. Several sites had a number of groups which were significantly larger than 10, and so including groups of 10 or more gives an average group size of 3.3. Groups were largest, on average, at Westonbirt (4.3 people per group excluding groups of 10 or more) and Wales mountain biking sites (3.3). Groups tended to be smaller in Cwmcarn (2.1).

In terms of total visitors to these sites, nearly half (48%) of all visitors were adults aged between 25 and 59. 28% of visitors were children, 8% were senior citizens and 16% were young adults.

Chart 1: Visitor composition by age group



The proportion of groups with senior citizens was highest in Cwmcarn (25%), and the proportion with children was highest in Westonbirt (95%). The proportion of groups with young adults was highest in Nant yr Arian (23%).

The proportion of groups with senior citizens was lowest in Glentress (7%), whilst the proportion with children was lowest in Wales mountain biking sites (6%). The proportion of groups with young adults was lowest in Whinlatter (3%).

10% of groups had a dog with them and 10% of groups had bikes.

Ethnicity and Disability

Interviewers recorded ethnicity and groups were asked whether or not anyone in their group had a disability or other special needs.

In terms of total visitors, almost all (98.8%) visitors were white, with only 1.0% of visitors Asian and 0.1% Afro-Caribbean. When compared with the composition of GB as a whole there were clearly significantly less Asian and Afro-Caribbean visitors to the forest sites.

Table 2: Visitor Composition by ethnic group

Ethnic Group	Survey	GB Population Base* (excluding other minority groups)
White	98.8%	93.5%
Asian	1.1%	4.4%
Afro-Caribbean	0.1%	2.1%

* Source: Annual Abstract of Statistics, 2004 edition.

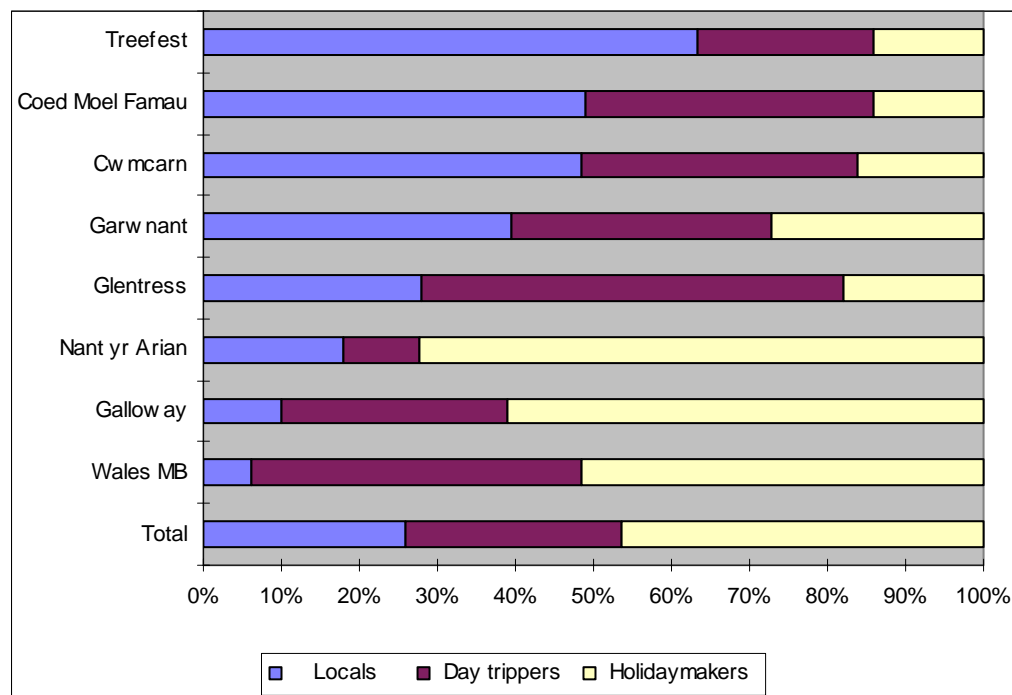
10% of groups contained at least one person with a disability or other special need. The highest percentages of groups containing a person with a disability or other special need occurred in Garwnant (30%) and Whinlatter (28%).

Type of visitor

26% of those interviewed lived locally (within 15 miles of the site). 45% of respondents were holidaymakers and around 28% were day-trippers. The proportion of locals was highest at the Treefest events in Scotland, with 59% of respondents at these events living locally.

73% of respondents at Nant yr Arian were holidaymakers. The proportion of day-trippers was highest at Glentress, with 54% of respondents at this site on a day trip from home.

Chart 2: Type of visitor¹



¹ Chart only shows surveys where the questionnaire included questions that could be used to determine the type of visitor.

Transport

The majority (90%) of those interviewed travelled to the site by car or van.

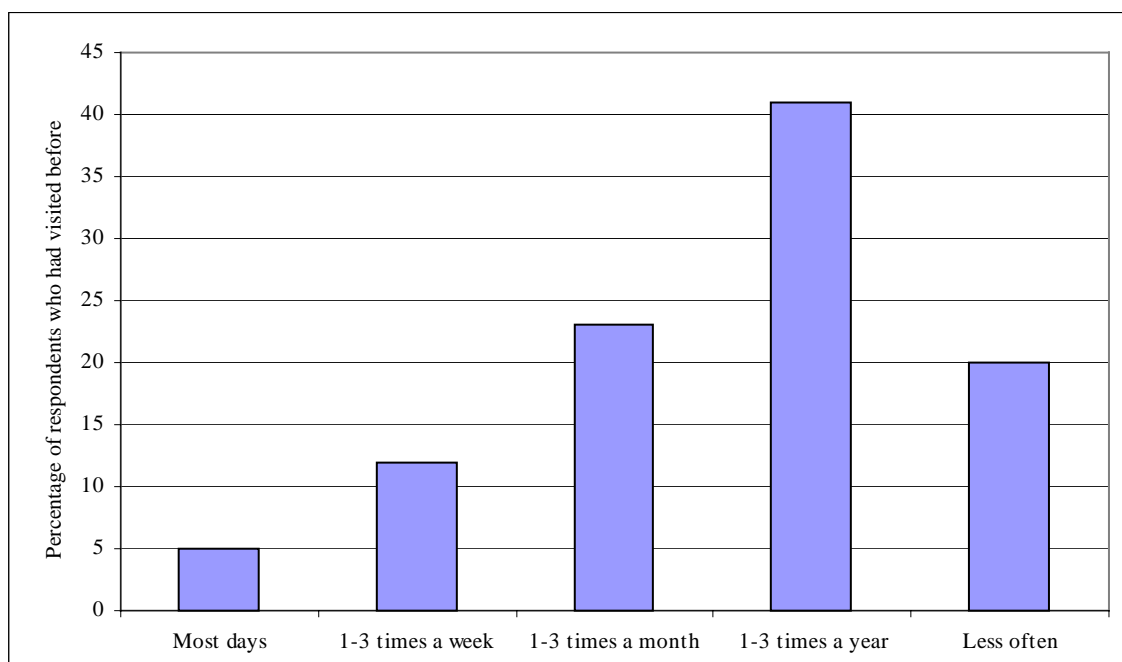
Frequency of visit

Two-thirds (67%) of visitors interviewed had visited the site before. Visitors to Glentress and Coed Moel Famau were relatively more likely to have visited the sites before (85% of visitors to these sites had been before). The proportion of respondents who had visited before was the lowest at Treefest sites (28%).

Of those who had been before, around two in five visit between one and three times a year. Just under a quarter visit between one and three times a month.

Respondents at Glentress (who had been before) were relatively more likely to visit frequently, with three in ten visiting at least once a week.

Chart 3: Frequency of visit



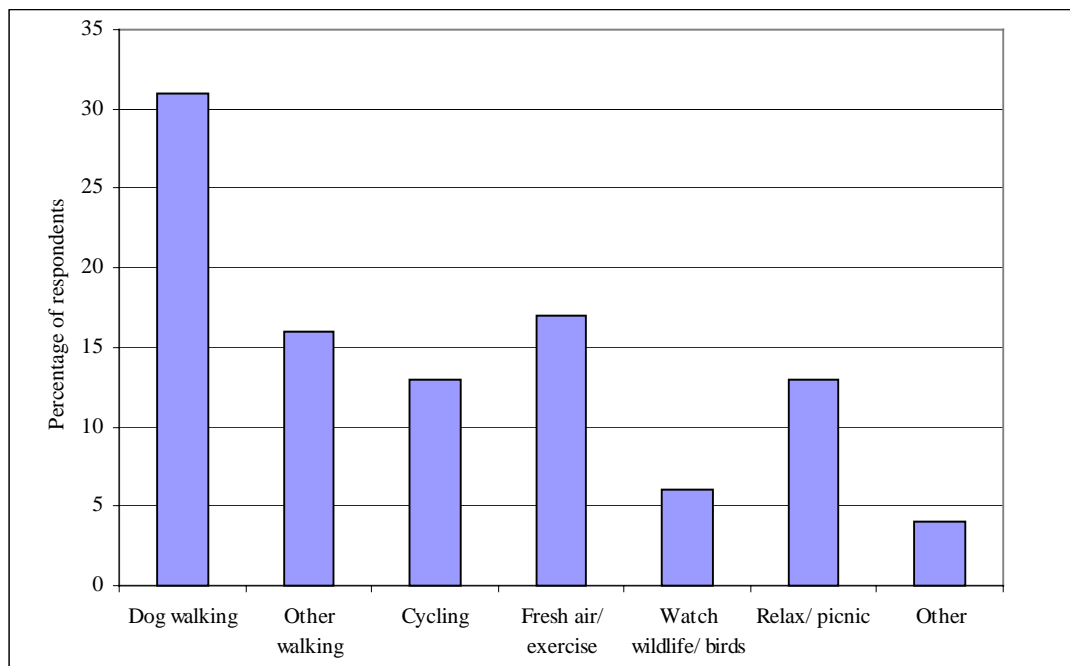
Main purpose of visit

The main purpose of the visit was recorded at five sites - Whinlatter/Dodd Wood, Nant yr Arian, Coed Moel Famau, Garwnant and Cwmcarn.

Almost half (47%) of the 686 people who responded to this question were visiting the site for a walk (with or without a dog). 17% were visiting for fresh air and exercise. 13% of respondents were visiting to relax and picnic, with the same proportion visiting to cycle.

The proportion of respondents visiting sites to walk a dog was highest at Whinlatter (60%). 19% of those interviewed at Coed Moel Famau were visiting the site for a walk (excluding dog walking). Respondents at Garwnant were relatively more likely to visit the sites for fresh air and exercise (37%).

Chart 4: Main purpose of visit



Length of stay

The average length of stay was 3.6 hours. Visitors to Galloway Forest Park (4.7 hours) and the Wales Mountain Bike sites (Afan and Coed y Brenin - 4.6 hours) were relatively more likely to stay longer. Visitors to Garwnant stayed for the shortest time (2.1 hours).

Visitor profile - ACORN code

In most surveys, those interviewed were asked to provide their full home postcode. 92% of respondents gave a valid postcode.

Each of these postcodes is assigned an “ACORN” code. The ACORN classification is created by CACI Ltd to provide a demographic classification, combining geography with demographics- the places where people live and their underlying characteristics. ACORN classifies people living in Great Britain into any one of 6 categories, 17 groups or 54 types. Addresses in postcodes within the same “type” will therefore tend to have a lot in common and are given a label which easily describes a typical member of that “type”, e.g. “Wealthy suburbs, large detached houses” etc.

This coding was carried out in March 2003, so does not use the new ACORN codes introduced by CACI later in 2003, based on the 2001 Census.

Table 3 shows the proportion of valid postcodes from the surveys that fall into each group. This is then compared to the overall GB population using an index, to look for similarities and differences between the two. An index greater than 100 suggests that more than the average number of people from that category are visiting forest sites.

Table 3: Acorn coded postcodes

Acorn group		2002 GB Population Base	2002 Visitor Surveys	Index
A1	Wealthy Achievers, Suburbia	14.3%	19.8%	138
A2	Affluent Greys, Rural Communities	2.2%	7.1%	323
A3	Prosperous Pensioners, Retirement Areas	2.7%	5.4%	200
B4	Affluent Executives, Family Areas	4.5%	7.4%	163
B5	Well-off Workers, Family Areas	7.2%	9.7%	136
C6	Affluent Urbanites, Town & City Areas	2.6%	2.5%	96
C7	Prosperous Professionals, Metropolitan Areas	2.1%	1.1%	52
C8	Better-off Executives, Inner City Areas	4.1%	2.9%	71
D9	Comfortable Middle Agers, Mature Home Owning Areas	12.7%	14.7%	116
D10	Skilled Workers, Home Owning Areas	13.2%	9.8%	74
E11	New Home Owners, Mature Communities	8.1%	6.0%	74
E12	White Collar Workers, Better-off Multi-Ethnic Areas	4.1%	2.2%	54
F13	Older People, Less Prosperous Areas	3.3%	2.2%	67
F14	Council Estate residents, Better-off Homes	11.1%	6.3%	56
F15	Council Estate residents, High Unemployment	3.3%	1.3%	39
F16	Council Estate residents, Greatest Hardship	2.3%	1.4%	61
F17	People in Multi-Ethnic, Low Income Areas	2.2%	0.2%	8
U	Unclassified	0.1%	0.1%	147

In general, visitors to FC forests tend to come from the more affluent social group (A and B) and less likely to come from the less prosperous groups (E and F). Table 3 shows that significantly more than the average number of respondents classified as 'Affluent Greys, Rural Communities' (A2), 'Prosperous Pensioners, Retirement Areas' (A3) and 'Affluent Executives, Family Areas' (B4) visited forest sites compared to the composition of GB as a whole. There were slightly more than the average number of people visiting from groups A1, B5, and D9 compared to the GB composition as a whole. The most under-represented groups were 'People in Multi-Ethnic, Low Income Areas' (F17), 'Council Estate Residents, High Unemployment' (F15) and 'New Home Owners, Mature Communities' (E11).

3. LOCAL VISITOR SURVEYS

3.1. SCOTLAND

BORDERS, Glentress

This survey took place at Glentress in the Scottish Borders Forest District. A total of 107 questionnaires were completed.

Summary

Most groups were day-trippers (54%), while 28% lived locally. 82% had visited before. 66% of respondents visited to cycle during their visit.

Results

	Total
Number of completed questionnaires	107
Group Composition	
% groups with senior citizens	13
% groups with adults aged 25-59	85
% groups with young adults (16-24)	9
% groups with children (< 16)	21
% with at least one non-white visitor (respondents only)	1
Average number of people per group (excl. groups of 10 or more)	3.0
Present Visit	
% who live locally	28
% who are on a day trip from home	54
% who did not travel from home	18
% who had visited before	82
% of those who had been before who visit site at least once a week	30
Average length of stay (hours)	4.2
Activities	
% who came to site for walking (incl. dog walking)	35
% who came to site for cycling	66
% who came to site for fresh air/relaxation	21

Timing of survey:	July, November and December 2002
Type of survey:	Self-complete
Non-standard topics:	Expenditure
Publication:	'Scottish Borders Visitor Survey 2002'

GALLOWAY FOREST PARK

This survey took place at various sites throughout Galloway Forest Park. A total of 443 responses were obtained by interview and self-completed questionnaire (a further 518 questionnaires were completed outside the Forest Park – not reported here).

Summary

61% of visiting groups were holidaymakers. 70% had visited before. 91% stated walking as one of the purposes of their visit. Satisfaction with facilities was generally very high.

Results

	Total
Number of Responses	443
Group Composition	
% groups with senior citizens	18
% groups with adults aged 25-59	55
% groups with young adults (16-24)	68
% groups with children (< 16)	30
% groups with at least one non-white visitor	<0.5
Average no. of people per group (excluding groups of 10 or more)	2.3
Present Visit	
% who live locally	10
% who are on a day trip from home	29
% who did not travel from home	61
% who travelled by car/ van	86
% who had visited before	70
% where purpose of visit included walking (including dog walking)	91
Average length of stay (hours)	4.6
Ratings¹	
% satisfied with picnic area	98
% satisfied with toilets	98
% satisfied with playground	95
% satisfied with information boards	96
% satisfied with car park	97
% satisfied with road signs	92

Timing of survey: January - December 2002
Type of survey: Interviewer, Self-complete
Publication: None

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

TREEFEST

This survey took place at various Treefest events throughout Scotland. A total of 197 responses were obtained (193 interviews and 4 self-completed on-line questionnaires).

Summary

43% of visiting groups lived locally with 26% having visited other Treefest or forest events. Nearly all visitors (99%) were satisfied with the event.

Results

	Total
Number of Interviews	197
Group Composition	
% groups with senior citizens	17
% groups with adults aged 25-59	84
% groups with young adults (16-24)	10
% groups with children (< 16)	55
Average number of people per group (excluding groups of 10 or more)	3.2
% groups where at least one person has a disability or special needs	6
% groups with at least one non-white visitor	1
Present Visit	
% who live locally	43
% who are on a day trip from home	15
% who did not travel from home	9
% who travelled by car/ van	82
% who had been to other Treefest or forest events	26
% who had visited a woodland before	80
% satisfied with the event ¹	99

Timing of survey:

Various events throughout 2002

Type of survey:

Interviewer, On-line questionnaire

Publication:

' Treefest Scotland Feedback Survey'

¹ Visitors are classed as satisfied if they rated the event as Very Good, Good or OK.

3.2. ENGLAND

NORTH WEST ENGLAND, Whinlatter & Dodd Wood

This survey took place at Whinlatter and Dodd Wood in the North West England Forest District. A total of 65 interviews were carried out (NB. Results should be treated with caution because of the small sample size).

Summary

Around one-third of visiting groups travelled from home. Nearly two in five groups had one or more children. A similar number visited the sites especially to see the ospreys.

Results

	Total
Number of Interviews	65
Group Composition	
% groups with adults	100
% groups with children	38
% groups where at least one person has a disability or special needs	11
% groups where total expenditure for day was more than £50	35
Average number of people per group	2.3
Present Visit	
% who are locals or on a day trip from home	35
% who did not travel from home	65
% who travelled by car/ van	100
% who visited area especially to see ospreys	38
% who decide to see ospreys after arriving in area	43
Ratings¹	
% satisfied with view of ospreys at Dodd Wood	96
% satisfied with view of ospreys at Whinlatter	100
% satisfied with facilities at Dodd Wood	96
% satisfied with facilities at Whinlatter	100
% satisfied with staff at Dodd Wood	100
% satisfied with staff at Whinlatter	100

Timing of survey: July and August 2002

Type of survey: Interviewer

Non-standard topics: Ospreys

Publication: None

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

NORTH WEST ENGLAND, Delamere Forest Park

This survey took place at Delamere Forest Park in North West England Forest District during December 2002. The survey was designed to obtain views about the 'Christmas experience' of customers.

Summary

82% of the groups visiting Delamere came to buy a Christmas tree, and 76% had bought a tree at the site the previous year. Most groups (86%) contained adults aged 25-59 and nearly half of the groups (43%) had children with them.

Results

	Total
Number of Interviews	208
Group Composition	
% groups with senior citizens	24
% groups with adults aged 25-59	86
% groups with young adults (16-24)	5
% groups with children (< 16)	43
Average number of people per group (excluding groups of 10 or more)	2.8
% groups where at least one person has a disability or special needs	9
% groups with dogs	10
% groups with bicycles	0
Present Visit	
% who travelled 15 miles or less	63
% who came to buy a Christmas tree	82
% who bought a tree at the site in 2001	76
% who visited Santa's workshop	22
Ratings¹	
% satisfied with the quality of trees	100
% satisfied with the price of trees	90
% satisfied with customer service	99
% satisfied with outdoor activities	98
% satisfied with car park	98
% satisfied with toilets	87

Timing of survey:	December 2002
Type of survey:	Interviewer
Non-standard Topics:	Christmas Tree purchasing, Christmas Tree ratings, Santa's Workshop, Workshop ratings
Publication:	'Delamere Christmas Tree Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

WESTONBIRT

This survey took place at Westonbirt Visitor Centre at Westonbirt Arboretum. A total of 105 interviews with families were carried out.

Summary

33% of groups had travelled over 25 miles to get to Westonbirt. 74% of groups interviewed had visited the site before, and 33% were planning to attend an event.

Results

	Total
Number of Interviews	105
Group Composition	
% groups with adults aged 25+	98
% groups with young adults (16-24)	9
% groups with children (< 16)	95
Average number of people per group (excluding groups of 10 or more)	4.3
% groups where at least one person has a disability or special needs	9
% groups with at least one non-white visitor	2
% groups with dogs	12
% groups with pushchairs	18
Present Visit	
% who live within 15 miles	32
% who live over 25 miles away	33
% who had visited before	74
% who had or planned to do some walking (including dog walking)	80
% who had or planned to attend an event	33
Average length of stay (hours)	3.2
Ratings¹	
% satisfied with paths/trails	100
% satisfied with picnic facilities	100
% satisfied with toilets	99
% satisfied with interpretation/information for families	95
% satisfied with car park	99
% satisfied with site safety	100
% satisfied with activities provided for families	90

Timing of survey:	August 2002
Type of survey:	Interviewer
Non-standard topics:	Families
Publication:	'Westonbirt Arboretum Family Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Excellent, Good or Average.

3.3. WALES

COED Y CYMOEDD, Cwmcarn

This survey took place at Cwmcarn in Coed y Cymoedd Forest District. A total of 108 interviews were carried out.

Summary

84% of groups travelled from home, while 73% had visited previously. 42% of groups stated walking as the main purpose of their visit and 31% of groups had bikes with them. 81% of groups used the visitor centre.

Results

	Total
Number of Interviews	108
Group Composition	
% groups with senior citizens	25
% groups with adults aged 25-59	78
% groups with young adults (16-24)	12
% groups with children (< 16)	21
Average number of people per group (excluding groups of 10 or more)	2.1
% groups where at least one person has a disability or special needs	11
% groups with dogs	11
% groups with bicycles	31
Present Visit	
% who live locally	49
% who are on a day trip from home	35
% who did not travel from home	16
% who travelled by car/ van	86
% who had visited before	73
% whose main purpose was walking (including dog walking)	42
% who had been in the visitor centre	81
Average length of stay (hours)	3.9
Ratings¹	
% satisfied with picnic area	100
% satisfied with toilets	97
% satisfied with playground	93
% satisfied with information boards	92
% satisfied with car park	100
% satisfied with road signs	93

Timing of survey:	August - September 2002
Type of survey:	Interviewer
Non-standard Topics:	Visitor Centre
Publication:	'Cwmcarn Visitor Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

COED Y CYMOEDD, Garwnant

This survey took place at Garwnant in Coed y Cymoedd Forest District. A total of 52 interviews were carried out (NB. Results should be treated with caution because of the small sample size).

Summary

Nearly three-quarters of groups travelled to Garwnant from home. Nearly three in ten groups had at least one person with special needs. 62% were dissatisfied with the toilets.

Results

	Total
Number of Interviews	52
Group Composition	
% groups with senior citizens	19
% groups with adults aged 25-59	79
% groups with young adults (16-24)	17
% groups with children (< 16)	27
Average number of people per group (excluding groups of 10 or more)	2.5
% groups where at least one person has a disability or special needs	29
% groups with at least one non-white visitor	6
% groups with dogs	13
% groups with bicycles	6
Present Visit	
% who live locally	39
% who are on a day trip from home	33
% who did not travel from home	27
% who travelled by car/ van	92
% who had visited before	62
% whose main purpose was walking (including dog walking)	33
Average length of stay (hours)	2.1
Ratings¹	
% satisfied with picnic area	100
% satisfied with toilets	38
% satisfied with playground	96
% satisfied with information boards	96
% satisfied with car park	100
% satisfied with road signs	100

Timing of survey: August – September 2002
Type of survey: Interviewer
Publication: None

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

COED Y GORORAU, Coed Moel Famau

This survey took place at Coed Moel Famau in Coed y Gororau Forest District. A total of 327 interviews were carried out.

Summary

86% of groups travelled to Coed Moel Famau from home and 26% had dogs with them. 85% had visited before. 58% of groups stated that walking was the main purpose of their visit.

Results

	Total
Number of Interviews	327
Group Composition	
% groups with senior citizens	21
% groups with adults aged 25-59	81
% groups with young adults (16-24)	21
% groups with children (< 16)	23
Average number of people per group (excl. groups of 10 or more)	2.6
% groups where at least one person has a disability or special needs	8
% groups with at least one non-white visitor	2
% groups with dogs	26
% groups with bicycles	5
Present Visit	
% who live locally	49
% who are on a day trip from home	37
% who did not travel from home	14
% who travelled by car/ van	91
% who had visited before	85
% whose main purpose was walking (including dog walking)	58
Average length of stay (hours)	2.3
Ratings¹	
% satisfied with picnic area	100
% satisfied with toilets	99
% satisfied with information boards	90
% satisfied with car park	100
% satisfied with road signs	98

Timing of survey: August 2002
Type of survey: Interviewer
Publication: 'Coed Moel Famau Visitor Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

COED Y MYNEDD, Nant yr Arian

This survey took place at Nant yr Arian in Coed y Mynedd Forest District. A total of 147 interviews were carried out.

Summary

73% of groups were holidaymakers. 41% had visited before. 23% of groups stated walking as the main purpose of their visit and 23% of groups had bikes with them.

Results

	Total
Number of Interviews	147
Group Composition	
% groups with senior citizens	20
% groups with adults aged 25-59	76
% groups with young adults (16-24)	23
% groups with children (< 16)	22
Average number of people per group (excluding groups of 10 or more)	3.2
% groups where at least one person has a disability or special needs	11
% groups with dogs	21
% groups with bicycles	23
Present Visit	
% who live locally	18
% who are on a day trip from home	10
% who did not travel from home	73
% who travelled by car/ van	93
% who had visited before	41
% whose main purpose was walking (including dog walking)	23
% who had been in the visitor centre	68
Average length of stay (hours)	2.8
Ratings¹	
% satisfied with picnic area	100
% satisfied with toilets	100
% satisfied with playground	95
% satisfied with information boards	95
% satisfied with car park	99
% satisfied with road signs	99
% satisfied with visitor centre shop	100
% satisfied with visitor centre information	86

Timing of survey:	August - September 2002
Type of survey:	Interviewer
Non-standard Topics:	Visitor Centre
Publication:	'Nant yr Arian Visitor Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

WALES MOUNTAIN BIKING

This survey of mountain bikers took place at two sites in Wales - Afan Argoed in Coed y Cymoedd Forest District and Coed y Brenin in Coed y Mynedd Forest District. A total of 143 interviews were carried out.

Summary

At Afan, 71% were on a day trip from home, compared with 24% at Coed y Brenin. At both sites, about 7 in 10 had ridden in the forest before.

Results

	Afan	Coed y Brenin	Total
Number of Interviews	55	88	143
Group Composition			
% groups with senior citizens	0	1	1
% groups with adults aged 25-59	95	90	92
% groups with young adults (16-24)	15	27	22
% groups with children (< 16)	5	6	6
Average no. of people per group (excl. groups of 10 or more)	2.8	3.6	3.3
% groups where at least 1 person has disability/special needs	2	1	1
% groups with at least one non-white visitor	0	5	3
Present Visit			
% who live locally	13	2	6
% who are on a day trip from home	71	24	42
% who did not travel from home	15	74	51
% who travelled by car/ van	98	91	94
% who had ridden in the forest before	71	68	69
% who had used the waymarked trails	98	94	96
% who had ridden off the waymarked trails	33	19	24
Average length of stay (hours)	3.5	5.1	4.5
Ratings¹			
% satisfied with the waymarking on the trails	100	99	99
% satisfied with the quality of the waymarked trails	100	99	99
% satisfied with the information at the trailhead	100	99	99

Timing of survey: June - July 2002
Type of survey: Interviewer
Non-standard Topics: Mountain Biking
Publication: 'Wales Mountain Biking Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

COED Y GORORAU, Coed Sarnau

This survey took place at Coed Sarnau in Coed y Gororau Forest District during the 'Kona 100' mountain biking event. A total of 179 questionnaires were completed.

Summary

Nearly all respondents (97%) travelled to the area especially for the event, with 94% staying overnight in the area. 83% of visitors travelled from England. All (100%) were satisfied with the mountain bike routes.

Results

	Total
Number of Interviews	179
Group Composition	
Average number of people per group (excl. groups of 10 or more)	2.6
Present Visit	
% who came to Rhayader specially for the 'Kona 100' event	97
% who stayed overnight in the area	94
% who stayed 1-2 nights	90
% who camped or stayed in a caravan	79
% who travelled to the event from England	83
% who spent £0 per day on accommodation	41
% who spent over £20 per day on accommodation	14
% who spent up to £10 per day on other things	31
% who spent over £20 per day on other things	32
Ratings¹	
% satisfied with mountain bike routes	100
% satisfied with 'Kona 100' event	99

Timing of survey:	August 2002
Type of survey:	Self-complete
Non-standard Topics:	Mountain biking
Publication:	'Kona 100 Visitor Survey 2002'

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Very Good, Good or OK.

4. OTHER SURVEYS

4.1. VISITOR MONITORING PILOT NEW FOREST & INVERNESS

A pilot for a new visitor monitoring methodology was carried out at various locations within two forest districts – New Forest and Inverness. A total of 1,174 interviews took place.

Summary

In New Forest FD, 76% of visitors lived locally and 85% had visited the forest before. 68% had dogs with them and visitors stayed for 1 hour on average. In Inverness FD, 54% of visitors lived locally and 74% had visited the forest before. 54% had dogs with them and visitors stayed for 1.1 hours on average.

Results

	New Forest	Inverness
Number of interviews	791	383
Group Composition		
% groups with senior citizens	30	26
% groups with adults aged 25-59	75	77
% groups with young adults (16-24)	7	9
% groups with children (< 16)	18	22
Average no. of people per group (excl. groups of 10 or more)	1.9	2.2
% groups where at least one person has special need	5	8
% groups with at least one non-white visitor	<0.5	1
% groups with dogs	68	54
% groups with bikes	5	7
Present Visit		
% who live locally	76	54
% who are on a day trip from home	10	11
% who did not travel from home	14	36
% who travelled by car/ van	76	79
% who had visited the forest before	85	74
Average length of stay (hours)	1.0	1.1

Timing of survey: February - August 2002
Type of survey: Interview
Publication: None

4.2. FOREST HOLIDAYS CAMPSITES

This survey took place at all 22 of the Forest Holidays campsites. The summary data below collates the results from all 22 campsites.

Summary

85% of respondents spent less than 7 nights at the campsite and 47% had stayed in a caravan or motor home. 28% had visited the Forest Holidays website. 25% had visited a Forestry Commission visitor centre during their holiday.

Results

	Total
Number of completed questionnaires	6,088
Campsite	
% staying in caravan/motor home	47
% staying in tent	52
% spending 7 or more nights at campsite	15
% season ticket holders	1
Campsite Ratings¹	
% satisfied with layout of site	98
% satisfied with Reception area	98
% satisfied with information at reception	97
% satisfied with welcome from site staff	98
% satisfied with availability of site staff during stay	98
% satisfied with helpfulness of site staff	98
% satisfied with cleanliness of site facilities	98
% satisfied with standard of site facilities	95
Website	
% who visited the Forest Holidays website	28
Activities	
% who had visited a Forestry Commission visitor centre	25
% who had been walking	83
% who had been cycling	33
% who had been birdwatching	22
% who had visited a historical/cultural attraction	36

Timing of survey: February - September 2002
Type of survey: Self-complete

¹ Respondents only rated the facilities that they had used. Visitors are classed as satisfied if they rate a facility as Excellent, Good or OK, and satisfied with ease of use if they rate use as Very Easy, Easy or OK.

CABINS

This survey took place at three of the four Forest Holidays cabin locations: Keldy, Loch Awe and Strathyre (no survey was carried out at Deerpark, which was being refurbished in 2002). The summary data below collates the results from the three locations.

Summary

95% of respondents were satisfied with the cleanliness of their cabin. 50% had used the Forest Holidays website. 50% had visited a Forestry Commission visitor centre during their holiday.

Results

	Total
Number of completed questionnaires ¹	1,348
Cabin Ratings²	
% satisfied with information available at reception	100
% satisfied with information provided in their cabin	99
% satisfied with cleanliness of cabin	95
% satisfied with welcome from site manager	99
% satisfied with contact with site manager	98
Booking	
% satisfied with information provided at time of booking	98
% satisfied with booking service	98
Website	
% who visited the Forest Holidays website	50
Activities³	
% who had visited a Forestry Commission visitor centre	50
% who had been walking	92
% who had been cycling	36
% who had been birdwatching	40
% who had visited a historical/cultural attraction	63

Timing of survey: May and July 2002

Type of survey: Self-complete

¹ Includes 184 responses from visitors who completed an old version of the questionnaire.

² Respondents only rated facilities that they had used. Visitors are classed as satisfied if they rate a facility as Excellent, Good or OK, and satisfied with ease of use if they rate use as Very Easy, Easy or OK.

³ Excludes 184 responses from visitors who completed an old version of the questionnaire.

4.3. GB DAY VISITS SURVEY 2002-03

This household survey was commissioned by a consortium of government departments and agencies responsible for recreation and tourism in GB. Similar surveys were carried out in 1994, 1996 and 1998. Fieldwork was carried out between March 2002 and March 2003 by TNS Travel & Tourism, using a random sample of GB adults (aged 16 and over). A total of 6,600 interviews took place. Respondents were asked mainly about the details of all leisure day visits taken from home in the previous two weeks prior to the day of the interview.

Summary

There were an estimated 5.2 billion leisure day visits from home during 2002/3 (similar to the figure for 1994, but down from 5.9 billion in 1998), including 1.3 billion trips to the countryside. An estimated 252 million trips were to woodland/forests.

In the two-week period prior to the interview, 8% of the adult population had visited woodland/forests. In the previous 12-month period, 40% had visited woodland/forests.

The total expenditure on day visits from home in 2002/3 was £71.1 billion. Of this amount, £1.2 billion was spent on trips to woodland/forests. The average amount spent on day visits to woods/forests was £4.70.

Visitors in Scotland were more likely to travel to the woodland/forest by car (59%, compared with 40% in Wales and 30% in England). Visitors stayed longest at sites in Wales (2.1 hours, compared with 2.0 hours in Scotland and 1.5 hours in England). Walking was the main activity for 63% of visitors in England and 64% in Wales, compared with 50% in Scotland.

Results

	GB	England	Scotland	Wales
Number of interviews	6,600	3,188	1,471	1,941
All trips				
Total number of day trips (millions) ¹	5,204	4,533	456	214
Total annual expenditure (£ billion)	71.7	61.9	6.2	3.1
Average expenditure per visit (£)	13.70	13.50	13.60	14.40
Woodland trips				
Total number of trips to woodland (millions)	252	222	18	12
Total annual expenditure (£ million)	1,195	1,032	118	45
Average expenditure per visit (£)	4.70	4.60	6.60	3.80
% who took woodland trip in last 12 months	40	40	36	40
% who took woodland trip in last 2 weeks	8	8	9	7
% who travelled to destination by car	32	30	59	40
% whose main activity was walking	62	63	50	64
Average length of journey (round trip) (miles)	15.0	14.3	20.9	18.3
Average time spent at site (hours)	1.6	1.5	2.0	2.1
Average group size	2.3	2.3	2.4	2.0

Timing of survey:

March 2002 - March 2003

Type of survey:

In-home interview (CAPI)

Publications:

Free summary leaflet – *GB Day Visits Survey*

Priced report (includes CD-ROM of results tables) – *GB Leisure Day Visits*

Topics covered:

Standard demographics and details of trips for two-week period, including activities, mode of transport, duration and group size.

¹ Estimated number of leisure day trips from home for 12-month period starting in March 2002.