



Forestry Commission

**FOREST VISITOR
SURVEYS
2006
Summary Report**

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CONTENTS

1. INTRODUCTION	3
2. LOCAL VISITOR SURVEYS	4
2.1. SCOTLAND.....	4
EVENTS EVALUATION.....	4
LAGGAN WOLFTRAX.....	5
2.2 ENGLAND	6
MUSIC IN THE FOREST.....	6
EAST ANGLIA, Thetford.....	7
WESTONBIRT, National Arboreta	8
WESTONBIRT, Visitor Play Survey 2006.....	9
WESTONBIRT, Christmas Questionnaire.....	10
SOUTH WEST CYCLING	11
2.3. WALES.....	12
COED Y CYMOEDD, Afan Forest Park.....	12
3. OTHER SURVEYS.....	13
3.1. QUALITY OF EXPERIENCE SURVEYS	13
DELAMERE FOREST	13
HAMSTERLEY FOREST	14
SHERWOOD PINES	16
GARWNANT FOREST.....	17
NANT YR ARIAN.....	18
NORTH WEST ENGLAND.....	19
SOUTH WALES VALLEYS	20
3.2. SCOTLAND 'ALL FORESTS' VISITOR SURVEY (YEAR 2)	21
YEAR 2 SUMMARY.....	21
SCOTTISH LOWLANDS.....	22
MORAY FOREST DISTRICT	23
LORNE FOREST DISTRICT	24
DORNOCH FOREST DISTRICT	25
TAY FOREST DISTRICT	26
SUMMARY OF RESULTS BY FOREST DISTRICT.....	27
3.3 SCOTTISH RECREATIONAL SURVEY 2005.....	28
3.4 FOREST HOLIDAYS.....	29
CAMPSITES	29
CABINS	30

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. Quality of experience surveys began in England in 2003, with three or four sites being monitored each year. The 'All Forests' visitor monitoring surveys began operating in Wales and Scotland in 2004, with results from the Welsh survey published in 2005; reports for the first and second years of Scotland All Forest survey have been published; a report on the third year and a final report will be published in early 2008.

Local surveys to provide information on forest visitors are still carried out when required by forest district management, for example, the surveys carried out at Westonbirt, detailed later in this report. These types of surveys address local management issues, with questionnaires designed to obtain information that varies from site to site. Some surveys are targeted at specific events or visitors - for example, the Christmas survey at Westonbirt; other surveys are more general. Results should be interpreted with caution when sample sizes are small.

Section 2 of this report gives the main findings from the local visitor surveys that were carried out in 2006 and details of others such as the survey of concert goers at our music in the forest events.

Section 3 gives details of other surveys carried out in 2006 that provide information about forest visitors. These include the 'All Forests' survey in Scotland, the 'Quality of Experience' surveys at various sites in England, 'Forest Holidays' surveys, and the Scottish Recreational survey.

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

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2. LOCAL VISITOR SURVEYS

2.1. SCOTLAND

EVENTS EVALUATION

This Events survey took place between June – October 2006 at eight Forest Districts; Aberdeenshire, Ae, Cowal & Trossachs, Fort Augustus, Galloway, Lochaber, Moray and Scottish Lowlands. Various events took place some of which included 10,000 steps, Den building, Bat watching, Photo workshops, Wildlife tours, Fungi day and various walks.

A total of 312 questionnaires were completed and the summary data collates the eight forest districts results together.

Summary

The majority of visitors (98%) who had attended these events said they would recommend the FCS event to family and friends. Almost all visitors were satisfied with the service provided by staff (99%). Three-quarters of visitors will be happy to receive information about the event in the future.

Results

	Total
Number of completed questionnaires	312
Visit details	
% who had attended one of our events before	33
% who attend an event more than once a year	38
% who were aware of the Event's guide	61
% who had visited the FC website	19
% who had seen the event advertised FCS event guide	24
% who would recommend the FCS event to family and friends	98
Ratings¹	
% satisfied with quality of information	100
% satisfied with overall quality of event	100
% satisfied with the service provided by our staff	100
Future	
% who would like to receive information in the future	75
% of preferred method to receive future information (Post / E-mail) ²	55/45

Timing of survey: June – October 2006
Type of survey: Self-completion questionnaire
Tables: Events Evaluation Form Scotland FD

¹ Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they give a rating of Excellent, Good, or OK.

² Satisfaction ratings based only on those who responded.

LAGGAN WOLFTRAX

This report provides an evaluation of the Laggan Wolftrax development based at Laggan. Although the report was to evaluate the mountain bike facility it was agreed that the report should also provide a profile of visitors to the walking and pony trekking trails.

Summary

Nearly three-quarter of visitors rated the mountain bike trails as very good (73%) and (15%) good. The Red route trail and the Blue fun park trails proved very popular with 90% and 84% respectively of visitors using them or going to. The development and promotion of other activities such as walking and pony trails had positive feedback and suggests a greater role for them in the future.

Results

	Total
Face to Face interviews with Mountain Bikers	506
Group details	
% of group in the majority were male	83
% of most popular age group 31 – 45 years old	47
Visit details	
% of visitors who became aware of mountain bike trails through word of mouth	55
% of visitors using Red Route Trail	90
% of visitors using Blue Fun Park	84
% of visitors using Black Double Diamond Route	45
% of visitors who visited at least 6 times or more in the last year	37
% of visitors spending at least one night away from home	52
% of visitors staying in youth hostel/backpackers accommodation or campsites.	47
Face to Face interviews with Walkers	96
Group details	
% of group in the majority were female	60
% of group aged between 31 – 45 years old and 46 – 60 years old	39/39
% of group walking dog	57
Visit details	
% of visitors became aware of trails after seeing board or sign in carpark	40
% of visitors planned to spend between one and three hours walking	76
% of visitors spending at least one night away from home	79
% of visitors staying in self catering accommodation	43
Ratings¹	
% of mountain bikers satisfied with cycling trails	100
% of walkers satisfied with the walking trails	100
Number of visitors satisfied with pony trekking trails	99

Timing of survey: July – August 2006
Type of survey: Face to face surveys and Self-completion
Publication: Laggan Wolftrax Evaluation Report

¹ Satisfaction ratings based only on those who responded

2.2 ENGLAND

MUSIC IN THE FOREST

These were a series of concerts that took place at Forestry Commission sites across England during June and July 2006. Research was undertaken at three of these events, Embrace (Bedgebury, 11th June), UB40 (Dalby, 23rd June) and Jamie Cullum (Delamere, 21st July). A total of 1,073 interviews were completed with 374 at Bedgebury, 344 at Dalby and 355 at Delamere. The results in the table below are comparing each of the individual sites.

SUMMARY OF RESULTS

	Bedgebury	Dalby	Delamere
	Embrace	UB40	Jamie Cullum
<i>Sex</i>	Just over half of visitors were female (55%).	Out of the three sites the highest proportion of female visitors came to the UB40 concert (63%).	Almost three-fifths of visitors were female (58%).
<i>Age</i>	Youngest profile of age bracket 16-34 years old (66 %).	Older visitors between the ages of 35-54 (63%).	Visitors were of mixed ages with the highest proportion aged 34 or under (53%).
<i>Life Cycle</i>	Over half of respondents (54%) were in the Young Independent lifecycle.	Just under half of respondents (45%) were in the Family lifecycle.	Respondents were slightly more mixed with 40% of respondents being Young Independents and 30% being in the Families lifecycle.
<i>Origin</i>	55% came from Kent.	82% came from Yorkshire and Humberside.	63% North West England.
<i>Type of trip/Accommodation</i>	Over four-fifths were on day trips (88%), with very few on an overnight stay (11%) but of those who did 28% stayed with friends/relatives and 28% stayed in a hotel.	Just over three-quarters were local day-trippers (76%) and about a quarter had an overnight stay (24%). Over half (51%) stayed in a caravan.	Over four-fifths had a trip from home (82%) while only 18% had an overnight stay. Of these almost two-fifths stayed in a hotel (37%) while over a third stayed with family and friends (35%)
<i>Transport used</i>	Vast majority travel by car/van (95%) and just under half (48%) travelled 25 miles or over to get to the concert.	Majority travel by car/van (89%) with 7% travelling by minibus or coach. Three-fifths (60%) travelled between 25 miles or over.	Only 5% came by train while the vast majority came by car/van (87%). 14% travelled less than 5 miles while 47% travelled 25 miles or over.
<i>Duration of Journey</i>	Average 1hr 15 mins.	Average 1hr 22 mins.	Average 1 hr 15 mins.
<i>Information Sources</i>	The largest amount of respondents (24%) received an e-mail from the ticket agency while a fifth (20%) heard from family and friends.	The highest proportion sourced the information from a Newspaper/magazine advert (36%)	Over a quarter (29%) of respondents had an e-mail from the ticket agency with 21% getting the information on the site.

Overall 36% of respondents at all three sites had previously visited the sites before the concerts. During previous visits over half (51%) of all respondents had come for a walk, 37% had attended a music event and 27% had come for a family day out.

EAST ANGLIA, Thetford

This survey took place at 15 sites in East Anglia Forest District over 26 fieldwork periods in 2006; a total of 235 interviews were carried out.

Summary

The majority of visitors travelled from home (86%) and of those that did not 31% had camped or stayed in a caravan.

Results

	Total
Number of completed questionnaires	235
Group composition	
% of senior citizens (aged 75+)	3
% of senior citizens (aged 60 - 74)	21
% of adults (aged 45 - 59)	39
% of adults (aged 35 - 44)	33
% of adults (aged 25 - 34)	20
% of young adults (aged 16-24)	4
% of children (aged <16)	21
% of groups with dogs	42
Trip Details	
% who travelled from home	86
% who travelled less than 6 miles	23
% whose main type of transport used was car / van	95
Visit Details	
% of repeat visitors to same forest	77
% who visit at least once a week	27
% length of stay over an hour	46
% who first found out about Thetford through friend or relation / had always known	18 / 34
Activities	
% whose main activity was dog walking / other walking	32 / 13
% whose main activity was cycling	6
% whose main activity was for fresh air / exercise	10
% whose main reason for visiting was to relax and picnic	15

Timing of survey:

2006

Type of survey:

Self completion questionnaires

Tables only:

Available by individual sites and as combined tables

WESTONBIRT, National Arboreta

Visitors to the National Arboretum were asked to complete a questionnaire from the end of May 2006 to the beginning of May 2007. The results from the 713 questionnaires returned are summarised below.

Summary

Over half of groups (55%) took up to an hour to travel to Westonbirt with a further 29% taking up to 2 hours. Just over one-fifth (21%) of groups were recommended by friends or relations to visit Westonbirt a further 7% had previously attended an event and thought they would come back. On the rating of enjoyment almost half of groups had rated it very good (48%).

Results

	Total
Number of completed questionnaires	713
Group composition	
% of groups consisting of ages 75 and over	17
% of groups consisting of ages 60-74	54
% of groups consisting of ages 45-59	42
% of groups consisting of ages 35-44	16
% of groups consisting of ages <35	32
Visitor details	
% of visitors who travelled up to 2 hours to get to the Arboretum	84
% of visitors who visited the Arboretum for the first time	38
% of visitors who visit the Arboretum Once a year/1–3 times a year	12/26
% of visitors who were prompted to visited by Family or relations	21
% whose main purpose for their visit was to see Famous Tree collection	53
Ratings¹ in term of Value for Money	
% satisfied with Admission Price	87
% satisfied with Forest shop	95
% satisfied with Plant centre	93
% satisfied with the Maple restaurant	87
% satisfied with the Courtyard cafe	85
Ratings¹ generally	
% satisfied with Roadsigns	96
% satisfied with Parking	98
% satisfied with Maples café	93
% satisfied with Forest shop	99
% satisfied with Staff/volunteers	99
% satisfied with Toilets	94
% satisfied with Directional signs on site	85
% satisfied with Educational info on site	97
% satisfied with Events	100
% satisfied with Enjoyment	100
% satisfied place for children	96
% satisfied Suitability for special needs	96

Timing of survey: May 06 – May 07
Type of survey: Self-completion questionnaire
Tables only: Westonbirt Arboretum 2006

¹ Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they give a rating of Very Good, Good or OK.

WESTONBIRT, Visitor Play Survey 2006

During the months of August – October the aim of this family play survey was to target those groups with young dependants in an attempt to obtain information that will allow the FC to improve services to families visiting Westonbirt. A total of 149 questionnaires were completed.

Summary

77% of the groups interviewed said that they are always accompanied by young people. 27% were on their first visit to Westonbirt. Nearly three-quarters (74%) of groups felt that nothing at Westonbirt prevented or hindered children's play. 78% felt it was very important or important to have opportunities for family interaction when visiting Westonbirt.

Results

	Total
Number of completed questionnaires	149
Use of Westonbirt	
% of respondents who are members of Friends of Westonbirt	54
% of respondents visiting for first time	27
% of groups containing at least one person aged 11-15	17
% of groups containing at least one person aged 5-10	73
% of groups containing at least one person aged under 5	50
% of groups in which adolescents (11-15) always accompany adults to Westonbirt	71
% of groups in which young children (5-10) always accompany adults to Westonbirt	84
% of groups in which babies/toddlers (aged under 5) always accompany adults to Westonbirt	77
Activities	
% of groups taking part in Informal nature play/Exploring walking	23/23
% of groups taking part in Collecting natural materials	21
% of groups taking part in Self led trails	16
% of groups taking part in Led family activities or events	15
% of groups Play using equipment taken from home	3
% of groups whose visit resulted in further play at home	70
Play	
% of groups who felt nothing at Westonbirt prevented/hindered play	74
% of groups whose favourite play activity was Active Play	23
Factors rated important in decision to take part in an activity ¹	
% stating – importance of cost	50
% stating - importance of ease of access	58
% stating – importance of close to other amenities	65
% stating – importance of first impressions	68
% stating – importance of health and safety	67
% stating - importance of opportunity for family interaction	81
% stating - importance of opportunity to interact with other families	22
% stating - importance of childcare/supervision provided	10
% stating - importance of interests of your children	93
% stating - importance of opportunity for new skills/learning	77

Timing of survey: Aug 06 – Oct 06

Type of survey: Interviewers

Tables only: Family Survey for Play, Westonbirt Arboretum 2006

¹ Importance rating expressed as a proportion of those who rated the facility. Visitors are classed as believing factor is important if they give a rating of Very important or Important.

WESTONBIRT, Christmas Questionnaire

These interviews were done in November/December 2006 to find out what visitors thought about this event. 127 Questionnaires were completed.

Summary

32% of groups visiting this event contained a person who is a Friend of Westonbirt. In terms of Value for money and Enjoyment from this event 99% of groups thought it was very good, good or ok. 71% of visitors found the Enchanted Wood event busy but ok.

Results

	Total
Number of completed questionnaires	127
Group Composition	
% of groups containing one male	53
% of groups containing one female	46
% of groups containing someone aged 75 and over	5
% of groups containing someone aged 60 – 74	31
% of groups containing someone aged 45 – 59	49
% of groups containing someone aged 35 – 44	27
% of groups containing someone aged 25 – 34	13
% of groups containing someone aged 16 – 24	8
% of groups containing someone aged 4 – 15	36
% of groups containing someone aged under 4	24
Visitor details	
% taken by groups to travel to Westonbirt (under an hour to an hour and a half travel)	88
% of groups saw the publicity by Banners on the roadside	12
% of those in group that are members of FoW	32
% of visitors that this was their first visit to Westonbirt	12
% of visitors who visit between 1 – 3 times a year	39
Ratings¹	
% satisfied with the event in terms of - Value for money	100
% satisfied with the event in terms of - Enjoyment	100
Enchanted Wood Trail	
% of visitors who found the enchanted wood trail overcrowded	17
% of visitors who found it busy but ok	71
% of visitors who said that the overcrowding affected their enjoyment of the event - a lot	5
% of visitors who said that the overcrowding affected their enjoyment of the event - a little	71
% of visitors who took an hour or less to walk round the Enchanted Wood	73

Timing of survey: November/December 2006
Type of survey: Interviewer
Tables: Christmas Questionnaire

¹ Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they give a rating of Very Good, Good or OK.

SOUTH WEST CYCLING

(developing off-road cycling in woodlands in the South West)

This study was brought about because of issues facing traditional forestry, with falling timber prices, less employment, reduced maintenance and lower harvesting rates. The study considers the economic and health benefits that can accrue from off-road cycling in the South West. Over 200 woodland off-road cycling locations were identified in the South West so the report looked at the geographic hubs as well as already clearly identifiable centres.

The consultation process identified 3 main themes relating to the region's woods and forests. These are livelihoods (jobs and businesses) including tourism, quality of life including recreation and access and health and wellbeing and natural resources and the environment.

The key finding of this report showed that there is considerable demand for woodland cycling across the South West. The number of current woodland cycling trips across the South West are estimated between 4 million and 8 million per annum. Of these, an estimated 1 million cycling trips are visitors to the region. The economic impact of this activity on the regional spend is between £81 million and £129 million per annum, supporting 1,300 to 2,000 full time equivalent jobs.

Development of new woodland off-road cycling facilities in the South West and across the UK has revealed that the local population alone has the potential to make between 6.8 million and 10.5 million woodland cycling trips per annum.

It was suggested that the benefits of a new planned development of woodland cycling would:

- Provide regional economic benefits.
- Bring benefits to woodland owners through a range of commercial opportunities as well as delivering other benefits across a range of key strategic issues.
- Address the health agenda and issues of social inclusion.
- Help manage and control the environment impact of recreation on sensitive sites.

This report can be obtained as A Feasibility Study or Appendices, December 2006.

2.3. WALES

COED Y CYMOEDD, Afan Forest Park

This survey took place at three differing sites within Afan Forest Park in Coed y Cymoedd Forest District and it is the fifth annual visitor survey out of a planned six for the area.

Between August 19th and September 9th, 403 face to face questionnaires were completed at the exits of Afan Forest Park Visitor Centre, Glyncorwg Mountain Bike Centre and Rhyslyn Car Park.

Summary

Over four-fifths of respondents (86%) did not consider visiting anywhere else that day. Over two-thirds of respondents had visited Afan Forest Park before and of those 9 out of 10 had visited within the past 2 years, 45 % of which had visited 6 or more times.

Visits by local residents have increased by 7% since last year, however visits by respondents from 1 to 2+ hours drive time have decreased by the same amount. The majority of visitors travelled to Afan Forest Park by car.

Mountain Biking continues to be the most popular reason for visiting with three-quarters of visits attributable to the sport. This has grown in comparison to last year where just under half of visits were by mountain bikers.

Over half of visitors to Afan Forest Park stayed in the park for over 3 hours compared to only a quarter in 2002.

Awareness of the Afan Forest Park website now stands at 44% and 4 out of 5 visitors rated the signage and information as either very or fairly good.

Timing of survey:	August – September 2006
Type of survey:	Face to Face questionnaire
Publication:	Research Document

3. OTHER SURVEYS

3.1. QUALITY OF EXPERIENCE SURVEYS

DELAMERE FOREST

This survey took place at Delamere Forest between 26th July and 28th October 2006. A total of 269 people were interviewed and 40 self-completion questionnaires were returned (25% of the 162 distributed).

Summary

The majority of visitors to Delamere were in the Family and Empty Nester lifecycle groups (77%), with those in the Family lifecycle likely to take part in walking and cycling while those in the Empty Nester lifecycle were likely to take part in hill-walking or rambling. Slightly over four-fifths of visitors were on a short trip of less than an hour from home (81%).

Results

	Total
Number of interviews	269
Visitor Profile	
% of senior citizens (aged 65+)	10
% of adults aged 45-64	35
% of adults aged 25-44	50
% of young adults (aged 16-24)	6
% of who were in the Family lifecycle group	39
% of visitors in social grades ABC1	72
Trip Details	
% who were from Crewe/Warrington	24 / 22
% who were on a short day trip from home (less than 1 hour)	81
% who were on a longer day trip from home (3 hours or more)	1
% who were on an overnight stay away from home	1
Visit Details	
% who had visited the forest before	80
% who visited 1 to 3 times a month	33
Average length of stay on site	2 hrs 22 m
Most important aspects in decision to visit²	
Feeling safe in the forest	4.24
Clean toilets	4.18
Being able to spend time with family and friends	4.13
Aspects of visit given top satisfaction rating^{1,2}	
Being able to get fit and healthy	4.11
Value for money of your whole trip or day out	4.03
Being able to enjoy scenery and views	3.99

Timing of survey:

26th July - 28th October 2006

Type of survey:

On-site interview, self-completion questionnaire

Publication:

'Monitoring the quality of experience in forests – Delamere'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important

HAMSTERLEY FOREST

This survey took place at Hamsterley Forest. A total of 267 people were interviewed and 62 self-completion questionnaires were returned (32% of the 191 distributed).

Summary

The largest proportion of visitors to the Hamsterley Forest were in the Empty Nester (over 55, no children) and Family lifecycles and were taking part in walking while in the forest. Visitors to Hamsterley tended to be on a repeat visit to the forest with these visitors typically coming to the site once a month or less.

The most popular leisure activities undertaken in Hamsterley Forest by visitors were being able to walk without a dog, picnics and barbecues and cycling. The most popular aspects of visiting the forest, were the peace and tranquillity, scenery and beautiful views. The average spend of visitors to the forest was £23.

Results

	Total
Number of interviews	267
Visitor Profile	
% of senior citizens (aged 65+)	11
% of adults aged 45-64	33
% of adults aged 25-44	50
% of young adults (aged 16-24)	6
% who were in the Family lifecycle group	43
% of visitors in social grades ABC1	62
Trip Details	
% who were from Darlington / Durham	43 / 12
% who were on a short day trip from home (less than 1 hours)	64
% who were on a longer day trip from home (3 hours or more)	2
% who were on an overnight stay away from home	9
Visit Details	
% of repeat visitors to same forest	78
% who visited 1 to 3 times a month	28
Average length of stay	2 hrs 53 m
Most important aspects in decision to visit ²	
Feeling happy to leave car in the car park	4.24
Clean toilets	4.18
Feeling safe in the forest	4.13
Aspects of visit given top satisfaction rating ^{1, 2}	
Value for money of your whole trip or day out	4.20
Enough car parking	4.20
Being able to spend time with family and friends	4.19

Timing of survey:

26th July - 28th October 2006

Type of survey:

On-site interview, self-completion questionnaire

Publication:

'Monitoring the quality of experience in forests – Hamsterley Forest'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

SHERWOOD PINES

This survey took place at Sherwood Pines Forest. A total of 303 people were interviewed between 26th July and 28th October and 63 self-completion questionnaires were returned (30% of the 213 distributed).

Summary

The largest proportion of visitors to Sherwood Pines were in the Family lifecycle group; these visitors were more likely than others to take part in a picnic and barbecue while on the site. Most visitors were on a short trip of less than an hour from home especially frequent visitors and dog walkers. Leisure activities in the forest include cycling, walking and visits to the café.

The most important aspects of visiting the forest was the feeling of being safe and being able to enjoy the scenery and views. Other influences in visiting the forest was the fact it was close to home and also the weather. The average spend of visitors to the forest was £24.

Results

	Total
Number of interviews / self complete questionnaires returned	303
Visitor Profile	
% of senior citizens (aged 65+)	8
% of adults aged 45-64	25
% of adults aged 25-44	57
% of young adults (aged 16-24)	10
% who were in the Family lifecycle group	49
% of visitors in social grades ABC1	64
Trip Details	
% who were from East Midlands / Nottingham	69 / 57
% who were on a short day trip from home (less than 1 hours)	77
% who were on a longer day trip from home (3 hours or more)	1
% who were on holiday away from home	8
Visit Details	
% of visitors who have visited before	69
% who visited 1 to 3 times a month	24
Average length of stay	2 hrs 47m
Most important aspects in decision to visit ²	
Clean toilets	4.33
Feeling happy to leave car in car park	4.29
Feeling safe in the forest	4.28
Aspects of visit given top satisfaction rating^{1,2}	
'Go Ape' High Rope course	4.18
Value for money of your whole trip or day out	4.15
Being able to spend time with family and friends	4.11

Timing of survey: 26th July - 28th October
Type of survey: On-site interview, self-completion questionnaire
Publication: 'Monitoring the quality of experience in forests – Sherwood Pines Forest'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

GARWNANT FOREST

This survey took place in Garwnant Forest and a total of 302 visitors were interviewed between 26th July and 28th October and 55 self completion questionnaires were returned (26% of the 211 distributed).

Summary

The majorities of visitors were in the Empty Nester and Family lifecycles and lived locally, travelling for less than an hour to reach the site. The leisure activities most frequently undertaken at Garwnant Forest include walking with and without a dog, hill walking or rambling and also visiting the café and forest shop.

Important factors for visitors in their decision to visit the forest were feeling safe in the wood, feeling happy to leave car in the car park and the clean toilets. Visitors were most satisfied with being able to enjoy scenery and views and being able to enjoy time with family and friends. The average spend of visitors to the forest was £17.

Results

	Total
Number of interviews	302
Visitor Profile	
% senior citizens (aged 65+)	18
% adults aged 45-64	41
% adults aged 25-44	37
% adults (aged 16-24)	5
% who were in Family lifecycle group	42
% who were in social grades ABC1	64
Trip Details	
% who were from Cardiff area	56
% who were on a short day trip from home (less than 1 hours)	60
% who were on a longer day trip from home (3 hours or more)	8
% who were on holiday away from home	17
Visit Details	
% of visitors who have visited before	67
% who visited 1 to 3 times a month	29
Average length of stay	1 hrs 52m
Most important aspects in decision to visit²	
Clean toilets	4.07
Being able to enjoy the scenery and views	4.00
Feeling safe in the forest	3.97
Aspects of visit given top satisfaction rating^{1,2}	
Being able to enjoy scenery and views	4.15
Being able to spend time with family and friends	4.06
Children's play equipment	4.00

Timing of survey: 26th July and 28th October 2006
Type of survey: On-site interview, self completion questionnaires
Publication: 'Monitoring the quality of experience in forests – Garwnant Forest'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

NANT YR ARIAN

This survey took place in Nant Yr Arian and a total of 294 visitors were interviewed between 26th July and 28th October and 79 self completion questionnaires were returned (34% of the 235 distributed).

Summary

Visitors to Nant Yr Arian were predominantly in the Empty Nester Lifecycle group (aged 55 or over, no children). The leisure activities most frequently undertaken at Nant Yr Arian were visiting the café, walking with and without a dog, visiting the Red Kite viewing area and birdwatching.

Important factors for visitors in their decision to visit the forest were being able to enjoy the scenery and views, feeling happy to leave car in the car park and the clean toilets. What visitors were most satisfied about their visit to Nant Yr Arian was the value for money of the trip and being able to enjoy the scenery and the views as well as the Red Kites. The average spend of visitors to the forest was £42.

Results

	Total
Number of interviews	295
Visitor Profile	
% senior citizens (aged 65+)	18
% adults aged 45-64	41
% adults aged 25-44	38
% adults (aged 16-24)	3
% who were in Family lifecycle group	30
% who were in social grades ABC1	70
Trip Details	
% who were from Shrewsbury area	26
% who were on a short day trip from home (less than 1 hours)	22
% who were on a longer day trip from home (3 hours or more)	9
% who were on holiday away from home	48
Visit Details	
% of visitors who have visited before	63
% who visited 1 to 3 times a month	23
Average length of stay	2 hrs 12m
Most important aspects in decision to visit²	
Being able to enjoy the scenery and views	4.26
Clean toilets	4.24
Feeling happy to leave your car in car park	4.04
Aspects of visit given top satisfaction rating^{1,2}	
Value for money of your whole trip or day out	4.27
Being able to enjoy scenery and views	4.25
Red Kite hide	4.25

Timing of survey: 26th July and 28th October 2006
Type of survey: On-site interview, self completion questionnaires
Publication: 'Monitoring the quality of experience in forests - Nant Yr Arian'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

NORTH WEST ENGLAND

This survey took place in the neighbourhoods within a mile of Moston Vale and Colliers Wood Community Woodland areas in North West England. A total of 319 visitors were interviewed in their homes between November and December 2006.

The objectives of this study were to find out about the recreational activities undertaken by members of these communities, levels of recreational use and awareness of local open spaces, motivations for and the barriers to using the community woodland sites for recreation and to identify improvements which could be made.

The main reason preventing respondents from visiting forests was being “too busy working or studying” whereas the main reason’s for respondents not visiting Moston Vale or Colliers Wood was because they were not aware of places to visit.

Results¹

	Moston Vale	Colliers Wood
Total Home Interviews	163	156
Visitor profile		
% of Male / Female respondents	48/52	51/49
% senior citizens (aged 65+)	17	19
% adults aged 45-64	31	33
% adults aged 25-44	38	37
% adults (aged 16-24)	14	10
% who were in Family lifecycle group	40	40
% who were in social grades ABC1	18	55
% who were in Full time employment 30 hours +	26	50
Active outdoor pursuit	72	81
% of respondents who do dog walking	26	33
% of respondents who Walk over 2 miles +	20	28
% of respondents who do cycling or mountain biking	12	19
Passive outdoor pursuits	50	56
% of respondents who visit parks and gardens	30	33
% of respondents who visit the outdoors with children	23	20
% of respondents who do sightseeing or touring (by car)	13	30
% of respondents who bird-watching or nature studies	4	13
Visits Details		
% who visited the site during the previous 12 months	11	12
Of those who visited the site, % who visited at least once a month	56	85
Average visits per year	57	116
Only those respondents who had visited before:		
Most important aspects in decision to visit ²		
Convenient/close to where I live	4.17	3.94
Feeling safe in the wood	4.12	4.32

Timing of survey: November and December 2006

Type of survey: In-home interviews (One adult per household)

Publication: 'Monitoring the quality of experience in community forests – NW England'

¹The report also separates the survey respondents in 'outdoor users' and 'non-users'.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

SOUTH WALES VALLEYS

This survey took place in the neighbourhoods of Briton Ferry, Tredegar and Mountain Ash in the South Wales Valleys. A total of 502 visitors were interviewed in their homes between November and December 2006.

The objectives of this study were to find out about the recreational activities undertaken by members of these communities, levels of recreational use and awareness of local open spaces, motivations for the barriers to using the FCW sites for recreation and to identify improvements which could be made.

Respondents were asked what generally prevented them from visiting forests; the main reasons given were “too busy working or studying”, “weather” and “poor health”.

Results¹

	Briton Ferry	Tredegar (St James Woodland)	Mountain Ash
Total Home Interviews	151	164	187
Visitor profile			
% of Male / Female respondents	40/60	49/51	42/58
% senior citizens (aged 65+)	22	20	25
% adults aged 45-64	34	37	36
% adults aged 25-44	38	35	29
% adults (aged 16-24)	6	9	11
% who were in Family lifecycle group	32	30	35
% who were in social grades ABC1	34	35	21
% who in full time employment 30 hours +	33	39	23
Active outdoor pursuit	86	76	72
% of dog walking	43	36	35
% of who walk over 2 miles	39	27	25
% of cycling or mountain biking	20	18	11
Passive outdoor pursuits	63	63	52
% of sightseeing/touring (by car)	36	32	30
% of who visit parks/gardens	35	37	31
% of who picnic/bbq and outdoor socialising	34	27	20
% of who visit the outdoors with children	34	23	21
Visits Details			
% who visited the site during the previous 12 months	36	21	25
Of those who visited the site, % who visited at least once a month	52	49	72
<i>Average visits per year</i>	60	45	106

Timing of survey:

November and December 2006

Type of survey:

In-home interviews (One adult per household)

Publication: 'Monitoring the quality of experience in community forests South Wales Valleys'.

¹ The report also separates the survey respondents in 'outdoor users' and 'non-users'.

3.2. SCOTLAND 'ALL FORESTS' VISITOR SURVEY (YEAR 2)

This survey was commissioned by FC Scotland to monitor the number of visits to their woodlands and to obtain visitor profiles. The survey takes place over a three-year period with five forest district being surveyed each year. A summary of the results of the second year of the survey is presented below and on the following pages. Monitoring took place at a sample of FCS woodlands (approximately 20% of forests in each forest district). Fieldwork was carried out between June 2005 and May 2006 by TNS Travel & Tourism. A total of 1,130 interviews took place.

YEAR 2 SUMMARY

An estimated 2.4 million visits were made to the five forest districts surveyed in 2005/6. The average group size was 1.9 people with 58% of visitors aged 25 - 59 years old. Under a fifth (17%) of visitors were on overnight stays in the area spending on average 8.2 nights in Scotland. 70% of visitors travelled less than 6 miles to the site while 56% were dog walkers, and the average duration of visit was 1 hour and 17 minutes.

Results

	Total
Number of interviews	1 130
Estimated number of visits (million)	2.4
Estimated annual spending (£ million)	8.2
Visitor profile	
Average group size	1.9
% of male	51
% of senior citizens (aged 60+)	22
% of adults aged 25-59	58
% of young adults (aged 16-24)	4
% of children (aged < 16)	16
% of groups with at least 1 person with a disability	7
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	59
% who travelled to the site by car/van	72
% on an overnight stay in area	17
Average length of stay in Scotland for overnight trips (nights)	8.2
% of visitors from England / Overseas	9 / 1
Visit Details	
% of repeat visitors to same forest	86
% who visit at least once a day	25
Average length of visit to forest	1 hr 17m
% whose main activity was dog walking / other walking	56 / 28
% whose main activity was Cycling / MTB on waymarked tracks	5
Average expenditure per visit (£)	18

Timing of survey:	June 2005 - May 2006
Type of survey:	Face to face interviews & visitor counting
Publications:	'All Forests Visitor Monitoring: Survey of visitors to FC Scotland woodlands 2005/6'
Topics covered:	Standard demographics and details of visit including length of stay, activities, group size and expenditure.

SCOTTISH LOWLANDS

General Information

Scottish Lowlands covers the whole of Central Scotland from the Lothians and Southern Fife in the east to Ayrshire and Arran in the west. The District manages some 39,000 hectares of national forest of which 11,000 hectares are on Arran.

Scottish Lowlands has a surprising array of biodiversity, including internationally important sites such as the extensive Arran Moors SPA. The district is the home to a range of key species, which include Black grouse, red squirrel, Hen harrier the Merlin and a large population of Great crested newt.

Summary

57% of visitors travelled to the site by car or van. Over three-quarters of visitors were on a local day trip and travelled less than 6 miles to the site (76%). Almost a quarter of visitors (24%) stated that their only reason for visiting the area was to visit the forest.

Results

	Total
Estimated number of visits (thousands)	938
Number of interviews	564
Visitor profile	
% of male visitors	56
% of senior citizens (aged 60+)	18
% of adults aged 25-59	59
% of young adults (aged 16-24)	6
% of children (aged < 16)	17
% from Scotland	97
% from England	1
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	76
% on an overnight stay in area	2
% who travelled to the site by car or van	57
% who walked all the way	37
Visit Details	
% of repeat visitors	94
% who visit at least once a day	36
Average length of stay at site	1 hr 8m
% whose main activity was dog walking / other walking	53 / 22
% whose main activity was Cycling / MTB on waymarked tracks	9
Value of forest	
% whose only reason for visiting area was the forest	24
Average expenditure per visit (£)	6

MORAY FOREST DISTRICT

General Information

Moray Forest District manages 23,000 hectares of land and extends from the Moray Firth in the North to the Cairngorms National Park in the South.

The district is home to high proportions of the GB populations of red squirrel and Capercaillie, with the woodlands being managed appropriately to benefit these endangered species. All the forests in Moray are well used by local residents and visitors but the coastal forests in particular play a significant role in recreation terms. Moray is well-wooded country and as such the timber industry is a significant employer, both directly and in downstream elements.

Summary

Moray Forest District has a high proportion of regular, repeat visitors (94%) with 28% visiting every day. The vast majority of visitors to the forest used car/van as their chosen mode of transport (87%).

Results

	Total
Estimated number of visits (thousands)	360
Number of interviews	156
Visitor profile	
% of male visitors	46
% of senior citizens (aged 60+)	16
% of adults aged 25-59	63
% of young adults (aged 16-24)	3
% of children (aged < 16)	18
% from Scotland	94
% from England	3
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	72
% on an overnight stay in area	6
% who travelled to the site by car or van	87
% who walked all the way	8
Visit Details	
% of repeat visitors	94
% who visit at least once a day	28
Average length of stay at site	1hr 3m
% whose main activity was dog walking / other walking	70 / 21
% whose main activity was Cycling / MTB on waymarked tracks	3
Value of forest	
% whose only reason for visiting area was the forest	12
Average expenditure per visit (£)	25

LORNE FOREST DISTRICT

General Information

Lorne Forest District lies in a scenic coastal area of Argyll. The forests are characterised by fine views in a spectacular mountain setting. The forests are well known for both their productive conifers and significant areas of native woodland. Landholding of the Forest District is 48,000 hectares of which 25,000 hectares are productive conifer woodland. There are 29 varied and interesting recreation facilities within the district, which include 75 km of walking trails and 178 km of cycle routes.

Summary

Over three-quarters of visitors travelled less than 6 miles to the site (78%) and just over three-fifths came by car / van (62%). Of the 5 sites surveyed Lorne had the highest proportion of walkers without dogs 39% and also the highest proportion of first time visitors 33%.

Results

	Total
Estimated number of visits (thousands)	297
Number of interviews	94
Visitor profile	
% of male visitors	42
% of senior citizens (aged 60+)	26
% of adults aged 25-59	59
% of young adults (aged 16-24)	3
% of children (aged < 16)	12
% from Scotland	66
% from England	28
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	44
% on an overnight stay in area	46
% who travelled to the site by car / van	62
% who walked all the way	37
Visit Details	
% of repeat visitors	67
% who visit at least once a day	20
Average length of stay at site	1 hr 26m
% whose main activity was dog walking / other walking	53 / 39
% whose main activity was Cycling / MTB on waymarked tracks	1
Value of forest	
% whose only reason for visiting area was the forest	6
Average expenditure per visit (£)	34

DORNOCH FOREST DISTRICT

General Information

Dornoch Forest District covers approximately 61,000 hectares of which 40,000 are currently under wooded cover. The district is the northern-most in Scotland and covers the countries of Sutherland, Caithness and a large part of Easter Ross.

The Forest District aim is to practice sustainable multi-purpose forest management and through which to deliver a wide range of public benefits.

Summary

Just under three-fifths of visitors were on a local day trip (56%) and out of the five districts surveyed Dornoch had the largest proportion of parties containing children 28%. The majority of visitors over four-fifths (82%) travelled by car/van.

Results

	Total
Estimated number of visits (thousands)	119
Number of interviews	98
Visitor profile	
% of male visitors	51
% of senior citizens (aged 60+)	20
% of adults aged 25-59	50
% of young adults (aged 16-24)	5
% of children (aged < 16)	25
% from Scotland	94
% from England	2
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	56
% on an overnight stay in area	14
% who travelled to the site by car / van	82
% who walked all the way	13
Visit Details	
% of repeated visitors	87
% who visit at least once a day	17
Average length of stay at site	59 m
% whose main activity was dog walking / other walking	58 / 22
% whose main activity was Cycling / MTB on waymarked tracks	4
Value of forest	
% whose only reason for visiting area was the forest	18
Average expenditure per visit (£)	19

TAY FOREST DISTRICT

General Information

Tay Forest District covers an area of some 38,000 hectares in Perth and Kinross Angus, Dundee and north-east Fife, from Rannoch Moor in the West to the North Sea and from Blair Atholl in the North to Kinross in the South. The majority of the forest district is afforested with forest size ranging from less than 100 hectares to some 5,000 hectares. There is major recreational usage, focussed on areas like Tay Forest Park, Kinnoull Hill Woodland Park, Tentsmuir and Glen Doll.

In total a population of some 2-3 million people live within 1 hours drive of the District's forests.

Summary

Over half of visitors (55%) were dog walkers and the average amount of time spend in the forest was 1 hour 35 minutes the longest duration of visits out of the five districts. Over four-fifths of visitors used car/van as their preference of transport (86%).

Results

	Total
Estimated number of visits (thousands)	717
Number of interviews	218
Visitor profile	
% of male visitors	50
% of senior citizens (aged 60+)	26
% of adults aged 25-59	55
% of young adults (aged 16-24)	4
% of children (aged < 16)	15
% from Scotland	83
% from England	14
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	39
% on an overnight stay in area	30
% who travelled to the site by car or van	86
% who walked all the way	9
Visit Details	
% of repeated visitors	79
% who visit at least once a day	16
Average length of stay at site	1 hr 35 m
% whose main activity was dog walking / other walking	55 / 33
% whose main activity was Cycling / MTB on waymarked tracks	3
Value of forest	
% whose only reason for visiting area was the forest	16
Average expenditure per visit (£)	23

SUMMARY OF RESULTS BY FOREST DISTRICT

	Scottish Lowlands	Moray	Lorne	Dornoch	Tay
<i>Estimated total visits</i>	938,000	360,000	297,000	119,000	717,000
<i>Sex</i>	Over half of visitors are male (56%).	Fairly even male/female split.	Over half of visitors are female (58%).	Even male/female split.	Fairly even male/female split.
<i>Age</i>	Highest proportion of those aged 16 to 34 years (21%)	Half aged 35 to 59 (50%)	Half aged 35 to 59 (50%) and a quarter 60 or over (26%). Lowest proportion with children (10%).	Largest proportion of parties containing children (28%).	Over half aged 45 or over (53%).
<i>Type of trip</i>	Three quarters on a local day trip (76%). Very few on overnight trips (2%).	Just under three-quarters on a local day trip (72%).	Highest proportion on overnight trips (46%). Next highest proportion on local day trip (44%).	Just under three-fifths on local day trip (56%).	Fairly even split between local day trips (39%), non-local day-trippers (31%) and those on overnight trips (30%).
<i>Travel to forest</i>	Just over three quarters travelling less than 6 miles (77%).	Just over three quarters travelling less than 6 miles (77%).	Just over three quarters travelling less than 6 miles (78%).	Most travelling less than 6 miles (62%) but 11% travelling over 25 miles.	Over half travelling less than 6 miles (57%) but 14% travelling over 25 miles.
<i>Transport used</i>	Just under three fifths travel by car/van (57%) while over a third walk (37%).	The vast majority travel by car/van (87%).	Just over three fifths travel by car/van (62%). Just over a third walk (37%).	The vast majority travel by car/van (82%).	The vast majority travel by car/van (86%).
<i>Frequency of visits</i>	High proportion of repeat visitors (94%). 36% visit at least once a day.	High proportion of repeat visitors (94%). 28% visit at least once a day.	High proportion of first time visitors (33%).	Mix of first time visitors (13%) and frequent visitors (17% daily).	Highest proportion of first time and infrequent visitors. Lowest average visits per year.
<i>Duration of visits</i>	Average 1 hr 8 mins	Average 1 hr 3 mins	Average 1 hr 26 mins	Shortest duration of visit – 59mins	Longest duration of visit – 1 hr 35mins
<i>Activities undertaken</i>	Majority walking with or without a dog (53% and 22% respectively). Highest proportion of mountain bikers (9%).	Majority walking with a dog (70%).	Highest proportion of walkers without a dog (39%).	Majority walking with or without a dog (58% and 22% respectively). Small proportion cycling/mountain biking (4%).	Majority walking with or without a dog (55% and 33% respectively).
<i>Expenditure per day</i>	£6	£25	£34	£19	£23

3.3 SCOTTISH RECREATIONAL SURVEY 2005

Questions were inserted into the Scottish Opinion Survey – a monthly Computer aided Personal Interview (CAPI) omnibus during the period January 2005 – December 2005.

Summary

A total of 12,219 questionnaires¹ were completed from which it was estimated that there were 291 million visitors to Scottish forests during 2005. The estimated value of recreational visits in 2005 is worth £4.8 billion. Most of the results shown below relate to all outdoor recreation visits, although we are able to extract information on woodland visits.

Results

	Total
Number of completed questionnaires	12,219 ²
% who visited outdoors for leisure and recreational activities in the last 12 months	75
Trip Details	
% whose main destination was FC / FE managed woodland	7
% whose main destination was woodland managed by others or unknown manager	6
% whose visit included a visit to an FC / FE managed woodland	10
% whose visit included a visit to a woodland managed by others or unknown manager	11
% who travelled 5 miles or less to reach site	45
% whose main means of transport used on last visit was car / on foot	56 / 35
Visit Details	
% who were on their first visit / visit at least once or twice a month	10 / 53
% who made visits to the outdoors up to 3 hours	59
Activities	
% whose main activity was walking less than 2 miles / 2 - 8 miles during last visit	22 / 29
% who were on a family outing during their last visit	20
Scottish Outdoor Access Code	
% who had not heard about Scottish outside access code	56
% who had not encountered any access problems on their last visit	82
Economic Benefits	
% who spent something on their visit	49
Average £ expenditure on visits including those who spent nothing	16

Timing of survey:	January – December 2005
Type of survey:	In-home interviews conducted using CAPI hardware
Publication:	TNS (2006). Scottish Recreation Survey: annual summary report 2005. Scottish Natural Heritage Commissioned Report No. 183 (ROAME No. F02AA614/4).
Topics Covered:	number, frequency and location of visits to the outdoors, activities, transport and distances travelled to visit, party composition, expenditure on visit, awareness and understanding of the SOAC and access to the countryside

¹ In September 2005 changes were made to the first few questions in this survey. More details on the change and the effect it may have had on the results are available in the report and in a forthcoming calibration report

² More details of sample sizes are provided in the main survey report. Some questions were asked only to those respondents who had made a visit during the previous four weeks, and some questions were not asked each month.

3.4 FOREST HOLIDAYS CAMPSITES

This survey took place at 20 Forest Holidays campsites. The summary data below collates the results from all 20 campsites.

Summary

11% of respondents spent 7 or more nights at the campsite and 33% had stayed in a caravan or motor home while 39 camped in a tent.

Results

	Total
Number of completed questionnaires	3,889
Visits	
% of repeat visitors to same campsite	61
% who brought dogs with them (Roundhill only)	35
% who heard about Forest Holidays through a recommendation	25
% who heard about Forest Holidays through Forest Holiday website	24
% who visited other Forest Holidays sites in last 2 years	40
Campsite	
% staying in caravan / motor home	36 / 21
% staying in tent	43
% spending 7 or more nights at campsite	12
% season ticket holders	2
Campsite Ratings¹	
% satisfied with information at reception	98
% satisfied with welcome from site staff	97
% satisfied with availability of site staff during stay	98
% satisfied with helpfulness of site staff	97
% satisfied with cleanliness of site facilities	94

Timing of survey:

April - October 2006

Type of survey:

Self-completion questionnaire

¹ Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they rate a facility as Excellent, Good or OK.

CABINS

This survey took place at the three Forest Holidays cabin locations: Deerpark, Keldy and Strathyre. The summary data below collates the results from the three locations.

Summary

100% of respondents were satisfied with the information they received from reception and 99% of respondents were satisfied with the welcome received from the site manager. 99% were satisfied with the spaciousness of the cabin.

Results

	Total
Number of completed questionnaires	538
Visit Details	
% of repeat visitors to the same site	43
% who would consider staying again	94
Booking³	
% satisfied with information provided at time of booking	93
% satisfied with booking service	91
Cabin Ratings³	
% satisfied with double bedroom	97
% satisfied with kitchen	97
% satisfied with lounge	99
% satisfied with shower room / toilet	91
% satisfied with interior decor	98
% satisfied with playloft / twin bedroom	97
% satisfied with balcony	98
% satisfied with spaciousness of cabin	99
Other Ratings¹	
% satisfied with information available at reception	100
% satisfied with information provided in their cabin	98
% satisfied with cleanliness of cabin	97
% satisfied with welcome from site manager	99
% satisfied with contact with site manager	98
Activities	
% who had been walking	94
% who had visited a historical/cultural attraction	23
% who had been birdwatching	15
% who had been cycling	35
% who had visited FC visitor centre	13

Timing of survey: Summer 2006

Type of survey: Self-completion questionnaire

¹ Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they rate a facility as Excellent, Good or OK.