

**All Forests Visitor Monitoring**  
Survey of visitors to FCS forests  
Year 1: June 2004 to May 2005

Forestry Commission Scotland  
January 2006



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# Executive Summary

## Background

- TNS Travel and Tourism were commissioned by Forestry Commission Scotland (FCS) in 2004 to undertake surveys and counts across all 15 of their forest districts. Due to the scale of this exercise, fieldwork is to be spread across a three year period from June 2004 to May 2007. During the first year of surveying, between June 2004 and May 2005, five forest districts were surveyed with fieldwork undertaken in Buchan, Galloway, Lochaber, Scottish Borders and West Argyll. In summary, the objectives of this survey are as follows
  - To measure volume of visitors across FCS forests;
  - To obtain information on visitor profiles.
- Surveying took place from June 2004 to May 2005 with over 1,400 hours of fieldwork undertaken during 339 days. During this period 609 face to face interviews were achieved.

## Estimated visitor numbers

- In each of the five forest districts the forest blocks selected to be included in the survey were chosen as a stratified representation of all FCS forests in the area in terms of estimated levels of usage and the size of the surrounding population.
  - By applying these categorisations, each forest was placed into one of nine strata. To obtain an estimate of total numbers of visits to all FCS forests in each of the districts, the average number of visits per access point at forests included within the survey was then applied to other forests in the same strata. As such estimates of total numbers of visits to forests in each of the forest districts have been obtained, as detailed overleaf.
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**Estimates of total visits to FCS forests June 2004 – May 2005**

	<b>Visits</b>
Buchan	694,000
Galloway	812,000
Lochaber	559,000
Scottish Borders	1,676,000
West Argyll	292,000
<b>Total</b>	<b>4.0m</b>

- Therefore, it may be estimated that around **4 million visits** were taken to forests in the five districts included in the survey during the first year of fieldwork.

**Visitor and visit characteristics***Profile of visitors*

- Overall, nearly three-fifths of visitors to FCS forests in these districts were male (59%). In terms of age profile, almost two-fifths of all visitors were aged 45 or over (38%) while 16% were aged under 16.
- The typical party of visitors to FCS woodland contained 2.2 people with almost two-fifths of all visits taken by people on their own (38%), 37% taken by couples/ groups of two and 24% taken by groups of 3 or more people.
- Fewer than 1% of visitors to forests were members of ethnic minority communities. Amongst those who stated that they were white, two-thirds were Scottish (66%) while about a quarter were English (27%). Higher proportions of visitors from England were recorded in Lochaber and West Argyll (37% and 34% respectively).
- Fewer than 1 in 20 visitors (3%) stated that they or a party member had a disability or special need.
- Almost a fifth of all visitors were on an overnight trip away from home when they visited the forest (19%) while the remainder of visitors were either on a day trip from a local base, within 6 miles of the forest, or from a location further away (27% and 44% respectively).
- Amongst visitors who were on trips away from home, the main UK areas of origin were Scotland (38%), North East England (9%), Yorkshire (8%) and North West England

(8%). A further 9% of tourists visiting forests were from overseas with places of origin including Germany, France, Spain, Holland and Australia.

- Over a third of visitors that were on trips away from home stayed in either a tent, caravan or cabin (36%) while 19% stayed in a hotel, guesthouse or bed and breakfast and 18% stayed in the home of a friend or relative.
- An average of 8.3 nights were spent away from home and an average of 8.0 nights were spent in Scotland. Two-fifths of visitors were on a short break of 1 to 3 nights from home (40%) and a third stayed away for between 7 and 14 nights (34%).
- Visitors on overnight trips were also asked to state the total number of visits they had taken to forests during their holiday (including their current forest visit). Overall, an average of 4.6 visits were taken to forests with 22% of respondents visiting only one forest while almost half visited woodland on 4 or more occasions (46%).
- All respondents were asked to indicate how far they had travelled to reach the forest, either from their home or the holiday accommodation they had used the previous night. Overall, the largest proportions of visitors had travelled the shortest distances with 46% travelling under 6 miles and 19% travelling between 6 and 15 miles. Only 18% of forest visitors travelled more than 25 miles to reach the forest.
- Overall, some 15% of visitors went to the forest at least once a day with 6% stating that they typically visited more than once a day. A further quarter visited 1 to 3 times per week (23%) and 21% visited less often but at least once a month. It can therefore be estimated that, across all of the forest districts, visitors typically took around 84 visits to the forest they were interviewed at each year.

#### *Trip profile*

- The majority of visitors to forests travelled to the forest by car (82%). 15% walked to the forest while much smaller proportions used other types of transport. Notably, fewer than 1% of all visitors used public transport to reach the forest.
  - Overall, the average length of visits (time at the site, not including travelling time) to forests was 1 hour 42 minutes. Almost half of visitors spent less than 1 hour (49%), 26% spent between 1 and 2 hours and the remaining 25% spent 2 or more hours.
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- The most popular activities overall were dog walking (43%), other walking (27%) and cycling/ mountain biking on waymarked tracks (22%). Levels of participation in each of the activities varied between the forest districts with the highest proportion of dog walkers recorded in Galloway (62%), more people walking without a dog in West Argyll (44%) and almost half of visitors in the Scottish Borders participating in mountain biking or other cycling on waymarked tracks (47%) (NB. Over 90% of the weighted sample for Scottish Borders was at Glentress).
- When asked what one thing, if anything, could be done to improve the woodland they were visiting, three-fifths of visitors provided a suggestion (62%) while the remaining 38% stated that they could think of nothing or that no improvements were required. The most frequently provided suggestions related to signposting improvements, improvements to tracks, providing more toilets and improving car park maintenance.

#### *Value of forests*

- All visitors were asked to specify how much money they had personally spent that day and, if they were on an overnight trip, how much they had spent on their accommodation the previous night. Across all respondents (day trippers and visitors on trips away from home), 44% spent nothing while 31% spent less than £20 in total. The average spend per person across all visitors (i.e. including those who spent nothing) was £18.
  - Total average spend per person varied between forest district with the highest spend per person in Lochaber (£30) and the Scottish Borders (£27) but lower spend in West Argyll (£13), Buchan (£5) and Galloway (£4).
  - Respondents were also asked to indicate how important the presence of the forest they were visiting and its facilities had been in their decision to come to the area for their day out/ while on holiday. While 1% of all visitors stated that the forest was 'not important at all' and 10% stated that the forest was 'not relevant' because they lived in the local area, larger proportions indicated that the forest was either their 'only reason for coming' (33%) or 'very important' (38%) in their decision to visit the local area
  - By applying information on average levels of expenditure per person per day to data relating to the influence of forests on decisions to visit, it is possible to estimate total
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spend by visitors whose decisions to go to visit the area were affected by the presence of a forest to visit. This calculation suggests that, across the five forest districts included in year 1 of the survey, approximately **£23 million** was spent by visitors who were influenced to take their visit due to the forest and its facilities. This expenditure was made during the day of the forest visit and included overnight accommodation, food and drink, transport and non-routine shopping.

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## **A. Background and methodology**

### **Background**

The Forestry Commission have collected information on the number and profile of visitors to their forests for a number of years. A variety of methodologies have been used including the installation of permanent mechanical counters, people and vehicle counters and, until 2001, a rolling programme of face to face surveys at a core of 'key' forests.

In late 2001 TNS Travel and Tourism were commissioned to pilot a survey method developed by Cheltenham and Gloucester College of Higher Education which aimed to provide more reliable estimates of visitor numbers and activities and an accurate profile of visitors to a wider range of Forestry Commission sites, including those classified as 'non-key' sites. In particular it was hoped that this 'All Forests' method would provide more accurate information on local usage of forests.

The pilot fieldwork was undertaken in the New Forest and Inverness forest districts in two waves, between February and May 2002 and August and September 2002. A total of 1,437 hours of fieldwork were undertaken at 15 forest blocks.

As a result of this pilot a number of fairly minor changes were suggested and made to the fieldwork materials and approaches to fieldwork scheduling. As a whole the methodology was found to achieve its objective of producing accurate and robust data regarding visitor numbers and profiles.

Following the success of the pilot, TNS Travel and Tourism were commissioned by Forestry Commission Wales (FCW) to undertake surveying using this methodology across their four forest districts, at a total of 38 forest blocks. Fieldwork for this survey took place from January 2004 to January 2005 with results published in September 2005.

TNS Travel and Tourism have also been commissioned by Forestry Commission Scotland (FCS) to undertake surveying using the same methods across all 15 of their forest districts. Due to the scale of this exercise, fieldwork is to be spread across a three year period from June 2004 to May 2007. During the first year of surveying, between June 2004 and May 2005, five forest districts were surveyed with fieldwork undertaken in Buchan, Galloway, Lochaber, Scottish Borders and West Argyll.

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The key objectives of this survey were as follows:

- To measure volume of visitors across FCS forests in each of the five districts;
- To obtain information on visitor profiles.

This report provides the results of this first year of surveying. Copies of the questionnaire, count sheet and contact sheet are appended.

## **Survey approach**

### *Geographical coverage*

Face to face interviews and counting of visitors was undertaken from June 2004 to May 2005 across the following Scottish forest districts:

- Buchan – 8 forest blocks.
- Galloway – 9 forest blocks.
- Lochaber – 6 forest blocks.
- Scottish Borders – 8 forest blocks.
- West Argyll – 7 forest blocks.

The forest blocks included in the survey were selected by FCS as a stratified representation of all of the blocks in each of the districts, on the basis of population levels within 15km of the site and perceived levels of visitor usage. At a combined level, the blocks selected are representative of the range of facilities and activities available in FCS woodland, but this is not always the case at a district level. Approximately a fifth of each district's forests was included in the survey.

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The map overleaf illustrates the location the forest blocks included in the survey and the forest district boundaries. The forest blocks included in the survey are numbered as follows:

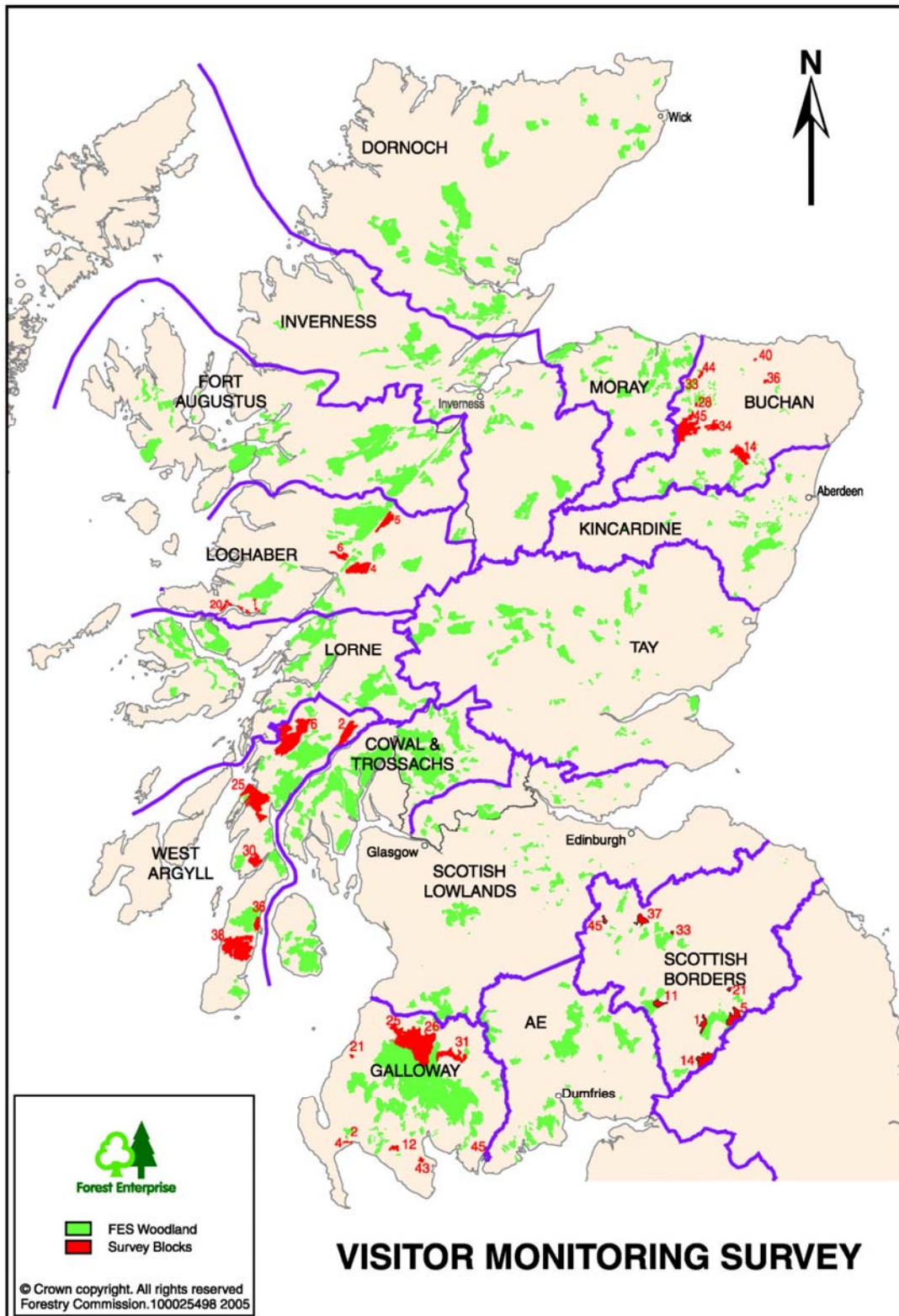
<p><b><u>Buchan</u></b></p> <p>14 Bennachie 28 Dunbennan 33 Dunnyduff 34 Gartly 36 Delgarty 40 Balchers 44 Sillyearn 45 Clashindarroch</p>	<p><b><u>Lochaber</u></b></p> <p>1 Loch Sunart East 4 Leanachan 5 South Laggan 6 Glen Loy 7 Callop 20 Loch Sunart West</p>	<p><b><u>West Argyll</u></b></p> <p>2 Shira Achnatra 6 Inverliever Collaig 19 Kilmichael 25 Knapdale Crinan 30 Torinturk 36 Carradale Walks 38 Lussa Forest</p>
<p><b><u>Galloway</u></b></p> <p>2 Dunragit 4 Torrs Warren 12 Corsemalzie 21 Knockbain 25 Carrick 26 Carrick Forest Drive 31 Castlemaddy &amp; Dundough 43 Kilsture 45 Barrhill, Kirkcudbright</p>	<p><b><u>Scottish Borders</u></b></p> <p>1 Shankend 5 Lethem 11 Meadshaw 14 Newcastleton 21 Swinnie 33 Thornylee 37 Glentress 45 Ladyurd</p>	

Each of the 5 forest districts varies somewhat in terms of the size of forest blocks, proximity to populated areas and facilities provided<sup>1</sup>. A map illustrating the locations of the survey blocks is provided overleaf while the following pages provide a summary of the main characteristics of each of the districts.

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<sup>1</sup> A map illustrating a typical forest block and the different types of access point is provided in Appendix 5.

Figure A-1 – Forest blocks included in survey and forest district boundaries



### Buchan Forest District

Buchan Forest District is located within Grampian and Moray local authority areas. Forest Enterprise manages an area of some 22,000 hectares of land in the district, from Keith in the west to Inverurie in the east and south into Strathdon.

The majority of the FE-managed land is afforested with block sizes ranging from less than 100 hectares (Pitcaple) to some 6000 hectares (Clashindarroch). Based in a predominantly farming/rural area the forest district has some highly productive commercial woodlands, an increasing recreational demand and increasing community participation. Conservation and biodiversity in the forest district has increased markedly in the past few years, in particular as a result of the Scottish Forestry Alliance project at Darroch Wids where 300 hectares of new native broadleaved woodland is being re-created.

Main centres of population are Keith, Huntly, Inverurie and Kemnay with Aberdeen City just outside the forest district boundary. In total a population of some 500,000 people live within 1 hours drive of the district estate.

### Galloway Forest District

Galloway Forest District is located in Southwest Scotland. Forest Enterprise manages 97,400 hectares of public land in the district, 70,000 hectares of which are mountain, moorland and forest. The landscape consists of a ring of forest around a central core of mountain and moorland. The wild heartland contains the Merrick, Southwest Scotland's highest mountain at 843 metres. The district includes a diverse range of landscape types including granite uplands, glaciated plains & foothills, freshwater lochs & rivers, moorland, blanket bogs and coastal dunes. The district is home to high proportions of the GB populations of red squirrel, black game and barn owl and strategically important populations of several other species including golden eagle, short-eared owl, salix lapponium, nightjar, black-throated diver, arctic char and Leisler's bat.

The forest district covers a rural area with a network of small villages and towns including Newton Stewart in the southwest, Dalmellington in the north and Kirkcudbright in the southeast.

A large part of the district (76,000 hectares) forms the Galloway Forest Park, the largest in Britain and the only one with three visitor centres. The Forest Park is a major player in

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British timber production and is the biggest single provider of outdoor recreation facilities in Southwest Scotland and provides a vital backdrop to the local tourism based economy.

#### Lochaber Forest District

Lochaber Forest District is situated within the Highland Council local authority area of Lochaber, a predominately mountainous region on the west coast of Scotland. The region straddles the southern part of the Great Glen and extends westwards to Ardnamurchan. The Lochaber region comprises of 4,468km<sup>2</sup> of which the forest district accounts for 10% or approximately 45,000 hectares, of this 24,000 hectares are woodland with the remainder being open hill ground extending over 1000 metres in elevation.

The main population centre for the area is the town of Fort William and its associated villages. Fort William lies at the foot of Britain's highest mountain, Ben Nevis. The population of Lochaber is approximately 19,500, of which some 60% live in and around Fort William. The town of Fort William commands a natural focal position and is a principal source of employment. It is a key sub-regional town and is the service and tourist centre at the heart of Lochaber.

Strategic road, rail, sea and canal communications converge on the town and provide vital links with the extensive rural catchment. This embraces the main outlying settlements of Acharacle, Spean Bridge, Kinlochleven and Mallaig. Together with many smaller communities located on the narrow coastal littoral and adjoining straths and lowland corridors.

#### Scottish Borders Forest District

Scottish Borders Forest District covers some 26,000 hectares in the Scottish Border region. As well as being a major producer of timber (about 260,000 tonnes per year), the forest district has 4 SSSIs and is a popular destination for tourists and day-trippers. The aim of the forest district is to produce a wide range of public benefits, economic, social and environmental through sustainable multi-purpose forest management.

The recreation facilities within the forest district include the Tweed Valley Forest Park, which has seen a massive rise in visitor numbers since its launch in 2002. A major re-development of visitor services at Glentress is underway to cater for the rise in demand.

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Community engagement is very active with the Friends of the Tweed Valley Forest Park providing volunteering opportunities including manning the Osprey viewing centre.

### West Argyll Forest District

West Argyll Forest District is situated on the west coast of Scotland, stretching up from the southern tip of the Kintyre Peninsula, it extends to the forests on the north-western shores of Loch Awe and the north of Loch Fyne. Forest Enterprise manages over 64,000 hectares of land in the district, of which around 49,000 hectares is under woodland cover.

With annual timber production nearing 400,000m<sup>3</sup>, forestry plays a very important part in the local economy both directly and indirectly through the economic spin-offs from recreational facility visitors. Woodland types vary from production oriented conifer forests undergoing restructuring programmes through to the Atlantic Oakwoods of Knapdale, also home to diverse topography and a stunning coastline.

Based around Dunadd and Kilmartin Glen, the district is steeped in history with over 40 Scheduled Ancient Monuments (SAMS). The cultural richness is rivalled only by the biological diversity associated with the mild climatic conditions and the range from coastal to upland heath habitats.

#### *Timing of fieldwork*

At each of the blocks included in the surveys interviewing and counting took place at every access point, following the methods outlined in the All Forests Methodology Guidance notes<sup>2</sup>. Essentially, this approach involves a total of 9 one-hour duration fieldwork periods being undertaken at every access point to the sampled forest blocks. Following the guidance, these periods should be distributed across different days of the week with a target of 3 during weekdays, 3 on Saturdays and 3 on Sundays. In terms of time of day, 5 or 6 of the fieldwork periods should be undertaken between 10am and 4pm (mid) while the remaining 3 or 4 were either undertaken before 10am (early) or after 4pm (late).

Following the first six months of fieldwork, those access points where no visitors or very low numbers of visitors had been encountered during interviewing shifts were removed from the

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<sup>2</sup> See Appendix 1

fieldwork schedule. Conversely, representation of the access points where the largest number of visitors had been encountered, allowing more interviews to be undertaken per hour, was increased for the second six months of fieldwork<sup>3</sup>.

Fieldwork at each forest block was undertaken fairly evenly across the 12 months to make it possible to take account of seasonal variations in visitor numbers, thereby providing more accurate data to use in the subsequent modelling of annual visitor numbers.

### *Counting*

During each one hour period interviewers counted the total numbers of visitors entering and leaving at each access point in total and according to their method of transport (e.g. bicycle, horse). When working at a car park interviewers also recorded the total number of vehicles parked at the start and end of the counting period. A copy of the count sheet used is appended<sup>4</sup>.

### *Interviews*

Interviewing of visitors was undertaken at each access point throughout the fieldwork period. Respondents were selected randomly to guarantee the representativeness of results and the conduct of interviews 'on-site' ensured that responses were immediate with no problems of respondent recall.

The survey took the form of an 'exit survey' with respondents interviewed at the end of their visit to each site to ensure that their actual behaviour patterns were recorded rather than their intentions. Visitors were targeted on the basis of the next person to leave on completion of the previous interview. This procedure maximised the number of interviews completed per hour whilst maintaining the random selection of respondents.

In circumstances where a group of people or a family left together, the "next birthday" rule was used to select one respondent per group or family for interview. The "next birthday" rule is a standard market research industry method which is widely used in face to face surveys to ensure that the oldest member of the family or the head of the group cannot self-select himself or herself as the respondent. All members of the group or family aged 16

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<sup>3</sup> Variations in the amount of fieldwork time spent at access points have been taken into account in the analysis of results and production of estimates of visitor numbers.

<sup>4</sup> See Appendix 4



years or over were eligible for selection, thus ensuring that the principles of random sampling were maintained.

The questionnaire used in the survey is provided in Appendix 2.

### *Fieldwork achieved*

Over the 12-month survey period more than 1,400 hours of fieldwork were undertaken during 339 days. During this period 609 interviews were achieved, an average of 0.4 interviews per hour. Of those people approached, 88% agreed to be interviewed. Reasons for not taking part in an interview included having already been interviewed for the survey, cycling so not being able to stop and being in a hurry. Around 2,500 visitors were counted leaving the forests during the fieldwork period.

The table below summarises fieldwork achieved in each forest district over the 12-month period.

**Table A-1 – All Forests Scotland Survey 2004/05 – Hours of fieldwork and interviews achieved by forest district**

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	Total
Days of fieldwork undertaken	70	63	73	92	41	339
Hours of counting and interviewing	317	313	332	342	161	1,465
Interviews achieved	120	138	51	268	32	609
Average interviews per hour	0.4	0.4	0.2	0.8	0.2	0.4

### **Estimating visitors numbers and weighting**

By following the survey approaches described, data on numbers of visits was collected at each forest block over nine available time periods:

<b>Weekdays</b>	<b>Saturdays</b>	<b>Sundays</b>
1) Early (before 10am)	4) Early (before 10am)	7) Early (before 10am)
2) Mid (10am to 4pm)	5) Mid (10am to 4pm)	8) Mid (10am to 4pm)
3) Late (after 4pm)	6) Late (after 4pm)	9) Late (after 4pm)

This data has been used to produce estimates of total numbers of visitors at each forest block by using the following approach:

1) For each of the nine time periods, the total number of hours a forest block was 'available' for a visit was calculated by estimating the number of daylight hours over the whole year (excluding hours before 6.30am when it is assumed that visitor throughput would be negligible):

<b>Weekdays</b>	<b>Saturdays</b>	<b>Sundays</b>
1) Early (before 10am) 752 hours of daylight	4) Early (before 10am) 150 hours of daylight	7) Early (before 10am) 150 hours of daylight
2) Mid (10am to 4pm) 1,561 hours of daylight	5) Mid (10am to 4pm) 310 hours of daylight	8) Mid (10am to 4pm) 310 hours of daylight
3) Late (after 4pm) 644 hours of daylight	6) Late (after 4pm) 129 hours of daylight	9) Late (after 4pm) 129 hours of daylight

2) The actual number of hours of counting undertaken at each access point during each of the nine time periods (typically 3 weekdays/ 3 Saturdays/ 3 Sundays and 5 or 6 mid and 3 or 4 early or late), was then applied to the total 'available' hours to produce a weighting factor.

3) Each of the weighting factors were then applied to the number of counts undertaken during each of the nine time periods to produce an estimate of total visits over the 12 months.

4) By adding together the estimates for each access point an overall estimate of annual visits was obtained for each forest block. These totals have then been applied to other, similar blocks not included in the survey to produce an estimate of visits to all FCS forests throughout each of the five forest districts.

As numbers of visitors both entering and leaving forests was recorded during fieldwork, it has been possible to extrapolate data using each of these measures. The final estimate of visitor numbers has been taken as the average of these two estimates. Details of the

confidence intervals associated with the estimates included in this report are provided in Appendix 6.

Throughout this report estimates have been rounded to the nearest 1,000.

In addition to providing estimates of the total volume of visits to FCS forests, it has been possible to use this data to weight the results of the survey of visitors. All of the results provided in the following sections have been weighted on this basis. Weighted, cross tabulated data tables are provided under a separate cover.

## B. Volume of visitors to FCS forests

### Total visits to FCS forests included in survey

By following the approaches outlined in the previous section it has been possible to obtain estimates of the total number of visits taken to each of the surveyed forest blocks during the June 2004 to May 2005 period. Tables B-1 to B-5 provide estimates for each of the forest blocks included in the survey, together with details of the classification<sup>5</sup> provided to each forest and numbers of entrances.

**Table B-1 – Estimated volume of visits to surveyed forests – Buchan, June 2004 to May 2005**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
14. Bennachie	H	H	4	1	2	6	13	224,000
34. Gartly	M	M	1	0	3	1	5	21,000
36. Delgarty	M	H	0	2	3	1	6	18,000
45. Clashindarroch	M	H	1	1	14	1	17	14,000
28. Dunbennan	L	H	0	0	2	0	2	5,000
33. Dunnyduff	M	H	0	0	2	1	3	4,000
44. Sillyearn	L	H	0	0	4	0	4	<1,000
40. Balchers	L	H	0	0	1	0	1	<1,000

In the Buchan Forest District, the estimated number of visits per block during the 12-month survey period ranged from less than 1,000 at Sillyearn and Balchers to around 224,000 at Bennachie. The total number of visits at blocks in the Buchan area which were included in the survey was around 287,000.

<sup>5</sup> In Tables B-1 to B-5, 'usage classification' shows the perceived level of visitor usage and 'population classification' the population level within 15km of the site. Both are classified on a scale of high (H), medium (M) or low (L).

In the Galloway Forest District, the largest number of visits were estimated to have taken place at the Carrick Forest Drive (58,000 visits) while fewer than 1,000 visits were estimated to have taken place at both Knockbain and Corsemalzie. The total number of visits taken to all of the survey sites in this district was around 192,000.

**Table B-2 – Estimated volume of visits to surveyed forests – Galloway, June 2004 to May 2005**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
26. Carrick Forest Drive	H	H	4	4	8	0	16	58,000
4. Torrs Warren	M	H	1	0	2	0	3	37,000
45. Barrhill	H	H	1	1	4	1	7	35,000
25. Carrick	L	M	1	1	10	0	12	27,000
43. Kilsture	M	H	1	0	2	0	3	20,000
31. Castlemaddy & Dundeugh	M	M	2	1	4	0	7	10,000
2. Dunragit	M	H	0	0	2	0	2	4,000
21. Knockbain	L	H	0	0	1	0	1	<1,000
12. Corsemalzie	L	M	0	0	1	0	1	<1,000

In Lochaber Forest District, Leanachan was estimated to have received around 143,000 visits during the 12-month survey period while Loch Sunart West was visited on around 7,000 occasions. Some 226,000 visits were estimated to have been taken to all of the Lochaber sites included in the survey.

**Table B-3 – Estimated volume of visits to surveyed forests – Lochaber, June 2004 to May 2005**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
4. Leanachan	H	H	3	0	12	0	15	143,000
6. Glen Loy	M	M	0	2	4	0	6	26,000
5. South Laggan	L	L	0	0	5	0	5	18,000
1. Loch Sunart - East	H	M	2	0	6	0	8	17,000
7. Callop	M	M	1	0	3	0	4	15,000
20. Loch Sunart - West	H	M	3	2	10	0	15	7,000

In the Scottish Borders Forest District, visits per block ranged from an estimated 1,240,000 at Glentress to around 3,000 per year at Lethem. The estimated total number of visits taken to blocks which were included in the survey was 1,325,000.

**Table B-4 – Estimated volume of visits to surveyed forests – Scottish Borders, June 2004 to May 2005**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
37. Glentress	H	H	3	6	9	2	18	1,240,000
14. Newcastleton	M	L	2	1	9	1	12	26,000
33. Thornylee	H	H	1	1	0	0	2	24,000
45. Ladyurd	H	H	0	2	2	0	3	13,000
11. Meadshaw	M	H	0	0	4	0	4	8,000
1. Shankend	M	H	0	1	4	0	5	6,000
21. Swinnie	M	H	0	2	2	0	4	5,000
5. Lethem	L	L	0	0	4	0	4	3,000

Finally, in the West Argyll Forest District, visits per block ranged from less than 1,000 at Shira Achnatra to around 43,000 at Kilmichael. The estimated total number of visits taken to blocks which were included in the survey was around 62,000.

**Table B-5 – Estimated volume of visits to surveyed forests – West Argyll, June 2004 to May 2005**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
19. Kilmichael	H	H	2	0	6	0	8	43,000
36. Carradale Walks	M	L	3	0	0	0	3	10,000
25. Knapdale Crinan	H	H	1	0	0	0	1	4,000
30. Torinturk	L	L	0	0	3	0	3	2,000
6. Inverliever Collaig	M	L	1	0	1	0	2	1,000
38. Lussa Forest	L	L	0	0	5	0	5	1,000
2. Shira Achnatra	H	H	1	0	0	0	1	<1,000

## **Time of visits**

With counts undertaken during different times of day and different days of the week, it is possible to estimate total numbers of visits taken during a variety of time periods. In the following sections the profile of visits are presented for each of the forest districts and for the five surveyed districts as a whole.

### *Time of day of visit<sup>6</sup>*

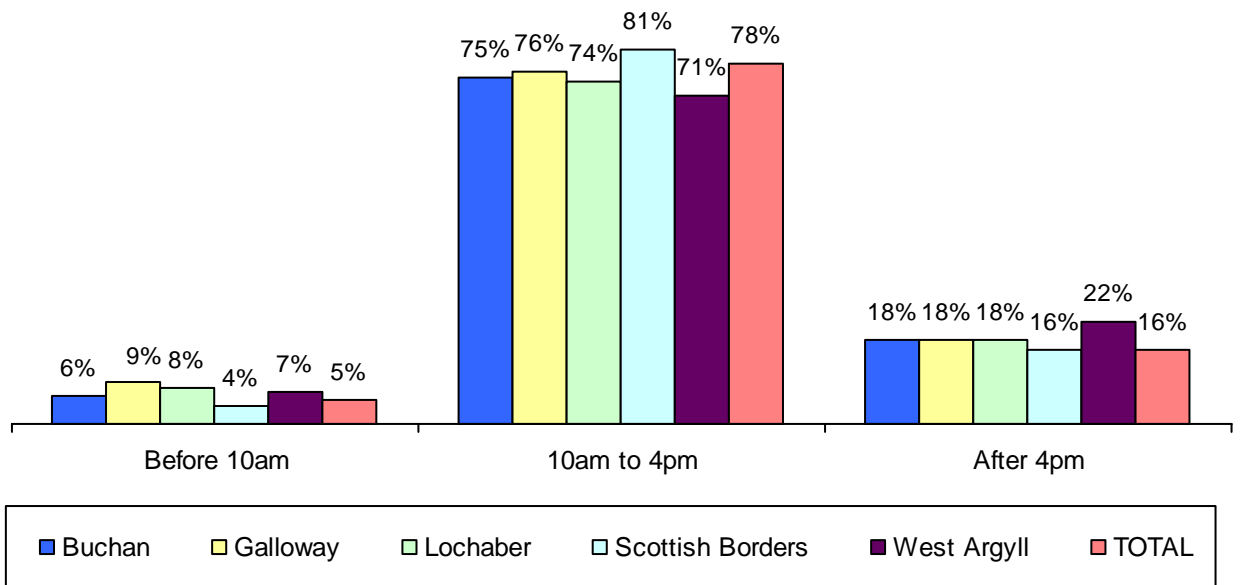
As might be expected, in all of the forest districts the majority of visits took place during the six-hour period between 10am and 4pm. However, a slightly higher proportion of visits were estimated to take place in the morning in Galloway (9%) and more evening visits took place in West Argyll (22%).

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<sup>6</sup> Analysis completed after publication of the original version of this report showed that the time of visit analysis originally published was incorrect. It has since been revised and this report now contains the corrected results.

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**Figure B-1 – Time of visit - FCS forests included in 2004/2005 survey (%)**  
 Base: Annual hours of daylight from 6.30am to sunset (4,135 hours)





*Day of visit<sup>7</sup>*

Around three-quarters of visits to forests were estimated to have taken place on weekdays (73%), 12% were taken on Saturdays and 14% on Sundays.

A comparison of the estimates for each district suggests that a slightly higher proportion of visits taken in the Lochaber district were on weekdays (81%) while around two in five visits taken in West Argyll were on weekends (44%).

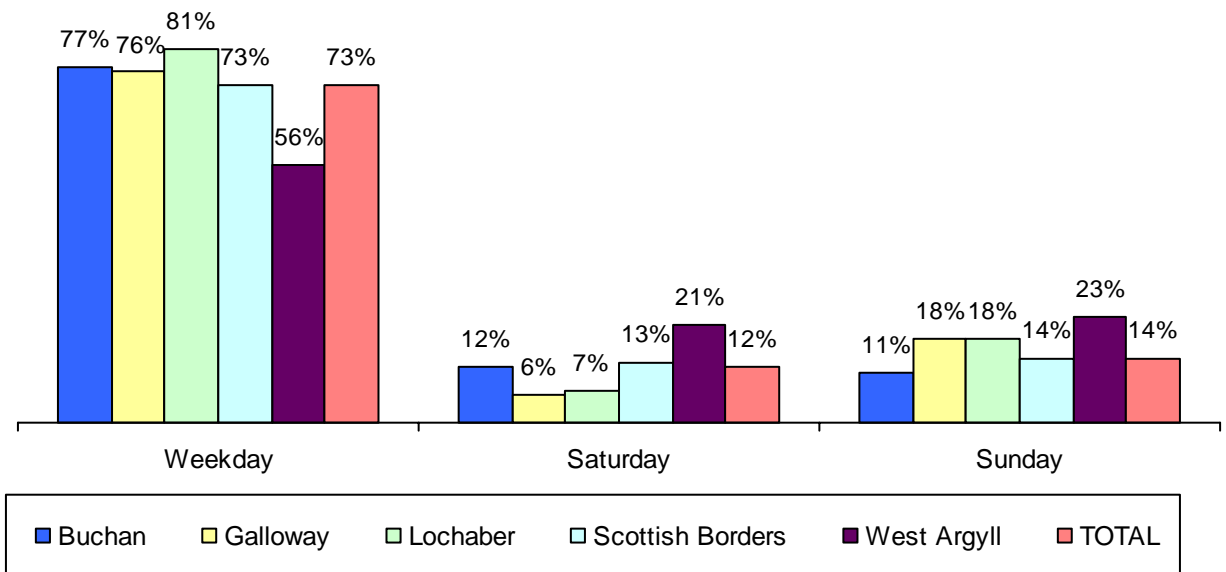
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<sup>7</sup> Analysis completed after publication of the original version of this report showed that the day of visit analysis originally published was incorrect. It has since been revised and this report now contains the corrected results.

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**Figure B-2 – Day of visit – all FCS forests (%)**

Base: Annual hours of daylight from 6.30am to sunset (4,135 hours)





### Total visits to all FCS forests

As mentioned previously, in each of the five forest districts the forest blocks selected to be included in the survey were chosen as representative of all forests in the area in terms of estimated levels of usage (high, medium or low) and the size of the surrounding population (high, medium or low). By applying these categorisations, each forest was placed into one of the following 9 'strata':

Strata	Population	Usage
1	High	High
2	High	Medium
3	High	Low
4	Medium	High
5	Medium	Medium
6	Medium	Low
7	Low	High
8	Low	Medium
9	Low	Low

To obtain an estimate of total numbers of visits to all FCS forests in each of the five districts, the average number of visits per access point at forests included within the survey were applied to other forests in the same strata.

As such the following estimates of total numbers of visits to forests in each of the forest districts as a whole have been obtained:

<b>Table B-6– Estimates of total visits to FCS forests June 2004 – May 2005</b>	
	<b>Visits</b>
Buchan	694,000
Galloway	812,000
Lochaber	559,000
Scottish Borders	1,676,000
West Argyll	292,000
<b>Total</b>	<b>4.0 m</b>

Therefore, it may be estimated that around **4 million visits** were taken to forests in the five districts included in the survey during the first year of fieldwork.

## **C. Visitor and visit characteristics**

In addition to counts being undertaken of visitors entering and leaving forests, some 609 interviews were undertaken with visitors. Each interview lasted approximately 10 minutes and used the questionnaire included in appendix 2.

With a total sample of 609, overall results of an unweighted random sample would be accurate to +/- 4% at the 95% confidence interval. However, the differential weighting for time of day, blocks and districts means that the overall confidence intervals are much wider. Care should be taken when interpreting the results at an individual district level where sample sizes are much smaller, especially in the Lochaber and West Argyll districts.

The following sections provide the results of this aspect of the survey with results weighted to reflect total visitor numbers.

## Party composition

The average party size was 2.2 people with almost two-fifths of all visits taken by people on their own (38%), 37% taken by couples/ groups of two and 24% taken by groups of 3 or more people.

The average party size was slightly higher in the Scottish Borders (2.3 people) but lowest in Buchan (2.0). Average party size was also higher amongst visitors who took part in walks without a dog (2.7), those who were on holiday (2.8) and those who were on their first visit to the forest they were interviewed at (2.9). Conversely, party sizes were smaller amongst people who visited the forest at least once a week (1.6), dog walkers (1.7), people who walked to the forest from their home (1.7) and amongst those aged 60 or over (1.9).

The table below illustrates the sex and age profile of respondents and their party members and, for comparison, the Scottish population profile.

**Table C-1 – Sex and age profile of all party members (%)**

Base: All party members (1,321)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL	Population of Scotland*
<b>Sex</b>							
Male	51	63	46	65	49	59	48
Female	49	37	54	35	51	41	52
<b>Age</b>							
Under 5	5	2	1	4	7	4	5
5 to 10 years	7	7	5	6	8	6	7
11 to 15 years	2	10	4	6	6	6	6
16 to 24 years	2	6	9	7	4	6	11
25 to 34 years	11	9	10	28	14	18	14
35 to 44 years	28	19	19	22	26	22	15
45 to 59 years	25	31	29	17	28	24	19
60+ years	20	16	24	10	7	14	21

\*Source: Census 2001

Overall, nearly three-fifths of visitors to FCS forests in the surveyed districts were male (59%). The higher proportion of male visitors was particularly notable in the Galloway and Scottish Borders areas (63% and 65% respectively) while the male/female split was more even in the other districts.

In terms of age profile, almost two-fifths of all visitors were aged 45 or over (38%) while 16% were aged under 16. The age profile of visitors varied between each of the forest districts with the largest proportion of children under 16 recorded in West Argyll (21%), more visitors aged between 16 and 34 in the Scottish Borders (35%) and more aged 60 or over in Lochaber (24%).

As illustrated in the table, in comparison to the population of Scotland as a whole, visitors to FCS forests were more likely to be male and more likely to be aged between 25 and 59.

As table C-2 below illustrates, the vast majority of visitors to forests in Scotland were white. Amongst those who stated that they were white, around two-thirds were Scottish (66%) while just over a quarter were English (27%). Higher proportions of visitors from England were recorded in Lochaber and West Argyll (37% and 34% respectively).

By comparison, the 2001 census recorded that 2% of the Scottish population were members of non-white ethnic groups. In terms of Local Authority areas, the proportions of non-white ethnic groups amongst the populations in the areas covering each of the five forest districts were as follows: 0.4% in the Scottish Borders, 0.5% in Dumfries and Galloway, 0.6% in the Highlands, 0.5% in Argyll & Bute and 0.5% in Aberdeenshire.

**Table C-2 Ethnicity (%)**  
Base: All respondents (609)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL
<b>Total White</b>	100	100	98	100	100	100
White – Scottish	73	65	53	67	66	66
White – English	22	23	37	27	34	27
White – other	5	11	8	5	-	7
<b>Asian</b>	-	-	-	-	-	-
<b>Black</b>	-	-	-	-	-	-
<b>Other</b>	-	-	2	*	-	*

-- nil respondents \* fewer than 0.5%

Overall, under one in twenty visitors (3%) stated that they or a party member had a disability or special need. Amongst these respondents, over two-thirds indicated that the disability related to mobility (69%). By comparison, 34% of households in Scotland have at least one member with a long-standing illness, health problem or disability (Scottish Household Survey).

**Table C-3 Disabilities and special needs (%)**

Base: All respondents (609)

	<b>TOTAL</b>
<b>Total in party</b>	<b>3</b>
Mobility	(69)
Hearing	(18)
Sight	(17)

Totals add up to more than 100% as respondents or party members may have more than one disability.



## Visitor origin

Visitors were asked to provide their home postcode, allowing analysis of place of origin. The table below shows that 83% were from Scotland and 11% from England. A small number of visitors came from Wales, Northern Ireland and overseas, while 4% of respondents did not give a valid postcode.

**Table C-4 Origin of visitors (%)**

Base: All respondents (609)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL
<b>Scotland</b>	<b>98</b>	<b>89</b>	<b>67</b>	<b>78</b>	<b>72</b>	<b>83</b>
Aberdeen	18	-	-	*	-	4
Aberdeenshire	68	-	4	1	-	14
Angus	-	-	-	1	-	*
Argyll & Bute	-	-	-	*	66	4
Scottish Borders	-	-	-	37	-	16
Dumfries & Galloway	-	51	-	*	-	12
Dundee	-	-	2	*	-	*
East Ayrshire	-	10	-	1	-	3
East Dunbartonshire	-	-	-	-	3	*
East Lothian	-	-	2	1	-	1
Edinburgh	-	-	2	18	-	8
Falkirk	-	-	2	1	-	1
Fife	-	-	2	2	-	1
Glasgow	-	1	-	2	-	1
Highland	1	-	51	*	-	5
Midlothian	-	-	-	3	-	1
Moray	9	-	-	-	-	2
North Ayrshire	-	4	-	-	3	1
North Lanarkshire	-	-	-	*	-	*
Orkney	-	-	2	-	-	*
Perth & Kinross	-	-	-	1	-	*
Renfrewshire	-	-	-	*	-	*
South Ayrshire	-	22	-	*	-	5
South Lanarkshire	-	1	-	3	-	1
W. Dunbartonshire	-	-	-	1	-	*
West Lothian	1	-	-	4	-	2
<b>England</b>	<b>1</b>	<b>4</b>	<b>22</b>	<b>16</b>	<b>19</b>	<b>11</b>
North East	1	-	-	6	3	3
North West	-	-	4	6	6	6
Yorks&Humber	-	1	4	1	3	1
East Midlands	-	-	2	*	3	*
West Midlands	-	-	2	1	-	1
East of England	-	-	2	*	-	*
London	-	1	-	1	-	1
South East	-	1	2	-	6	1
South West	-	1	6	-	-	1
<b>Wales</b>	-	<b>1</b>	<b>2</b>	-	-	<b>*</b>
<b>N. Ireland</b>	-	<b>1</b>	-	-	-	<b>*</b>
<b>Overseas</b>	<b>1</b>	-	<b>6</b>	<b>1</b>	-	<b>1</b>
<b>Not Known</b>	<b>1</b>	<b>5</b>	<b>4</b>	<b>4</b>	<b>9</b>	<b>4</b>

Base: Buchan(120), Galloway(138), Lochaber(51), Scottish Borders(268), West Argyll(32), Total(609) - nil respondents \* fewer than 0.5%

The table above highlights that nearly all visitors to Buchan forest district are local people, while visitors to Scottish Borders forest district include people who travel from further afield.

Lochaber has the highest proportion of visitors from outside Scotland, but the low sample size for this district means we need to treat the results with caution.

### **Type of trip**

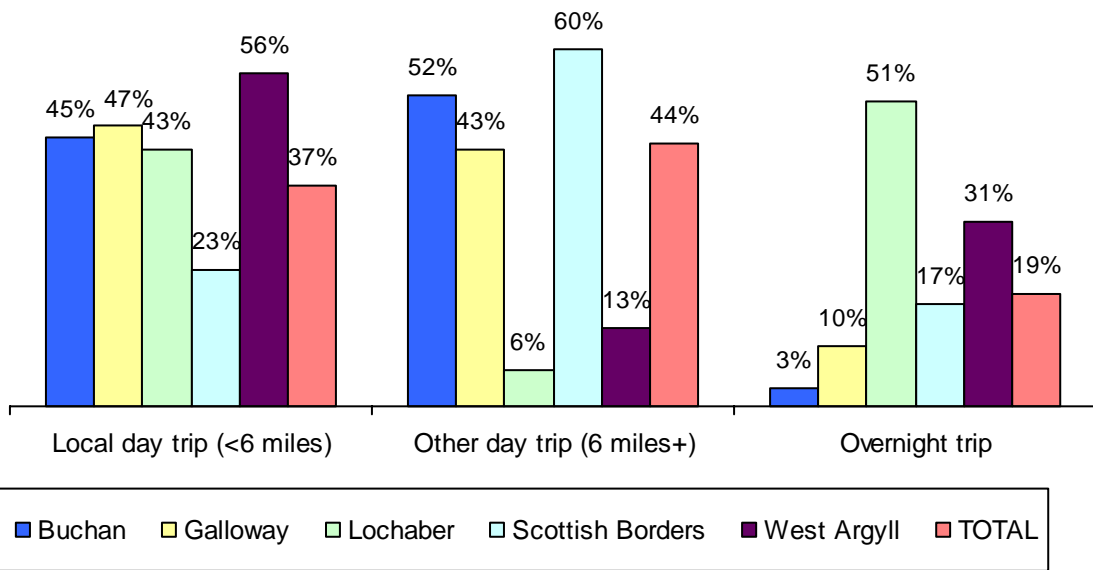
As Figure C-1 below illustrates, almost a fifth of all visitors were on an overnight trip away from home when they visited the forest (19%) while the remainder of visitors were either on a day trip from a local base, within 6 miles of the forest, or from a location further away (37% and 44% respectively).

The proportion of visitors on overnight trips was highest in the Lochaber and West Argyll districts (51% and 31% respectively) but lowest in Buchan (3%). Other groups more likely to be on overnight visits included those interviewed in June, July and August (32%), those who were on their first visit to the forest (57%) and visitors aged under 35 (23%).

The largest proportion of local day trippers were recorded in West Argyll (56%) while most visitors in the Scottish Borders were on day trips from places further away (60%).

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**Figure C-1 – Whether on a day trip or staying away from home (%)**  
 Base: All respondents (609)



## **Overnight visits**

Visitors who were staying away from home were asked further questions relating to their trip.

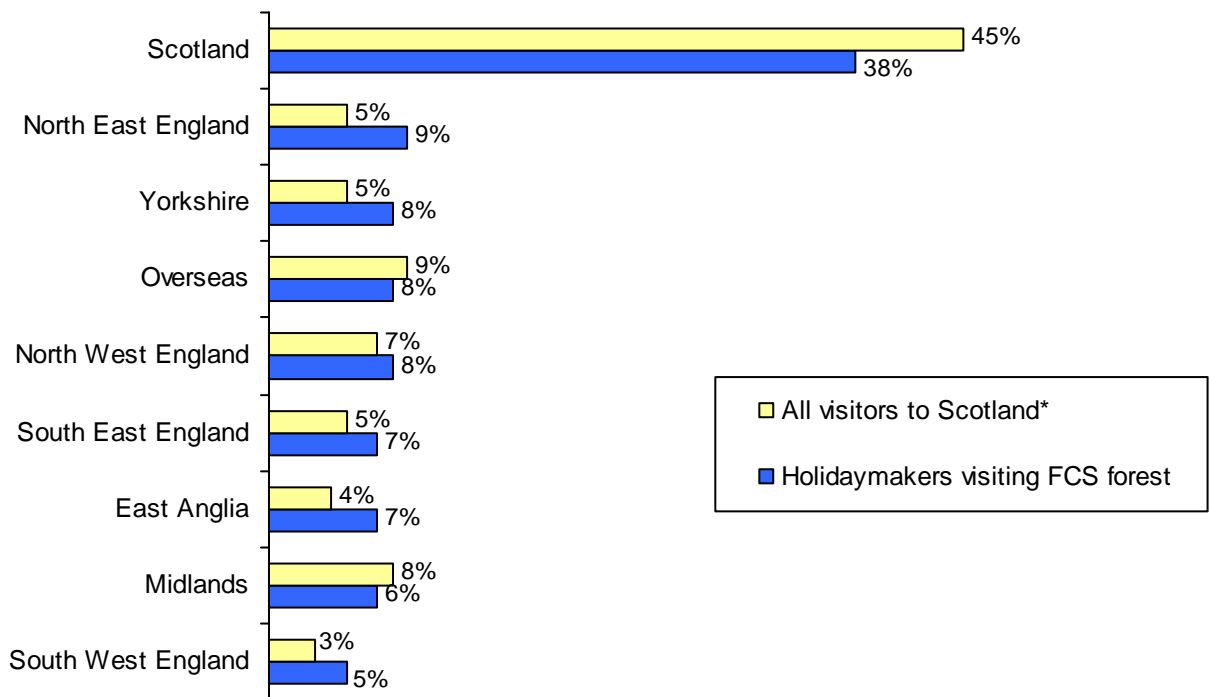
### *Place of residence*

Figure C-2 compares the place of residence of tourists who visited FCS forests while on holiday with the profile of tourists to Scotland during 2003. The main UK areas of origin of visitors to forests across the 5 forest districts included in the survey were Scotland (38%), North East England (9%), Yorkshire (8%) and North West England (8%). A further 9% of tourists visiting forests were from overseas with places of origin including Germany, France, Spain, Holland and Australia.

By comparison, a larger proportion of all tourist trips taken in Scotland are made by residents of Scotland while slightly smaller proportions are taken by people who live in England.

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**Figure C-2 –Place of residence of overnight visitors (%)**  
 Base: All respondents on overnight trips from home (100)



\*Source: Tourism in Scotland 2003, VisitScotland

*Accommodation used*

Visitors who were staying away from home were asked to indicate the type of accommodation they had stayed in. Table C-5 compares the responses provided by forest visitors with the overall profile of visitors to Scotland.

A third of visitors to forests stayed in either a tent, caravan or cabin (36%) while 19% stayed in a hotel, guesthouse or bed and breakfast and 18% stayed in the home of a friend or relative.

By comparison, visitors to Scotland generally were more likely than forest visitors to stay in the home of a friend or relative or to use a hotel, guesthouse or bed and breakfast but less likely to camp, stay in a caravan or use other self catering accommodation.

**Table C-5 – Overnight accommodation used (%)**

Base: All respondents on overnight trip from home (100)

	<b>Holidaymakers visiting FCS forests</b>	<b>All visitors to Scotland*</b>
Tent/ Caravan/ Cabin	36	7
Hotel, Guest House or B&B	19	41
Home of friend or relative	18	37
Self catering accommodation	17	5
Youth Hostel/ Outdoor Centre	4	2
Motor home	3	n/a
Other	3	6

\* Source: Tourism in Scotland 2003, VisitScotland

*Length of stay*

Visitors who were on an overnight trip from home were asked to indicate how many nights they were away in total and how many nights they spent in Scotland. As the table below illustrates, an average of 8.3 nights were spent away from home and an average of 8.0 nights were spent in Scotland. Two-fifths of visitors were on a short break of 1 to 3 nights from home (40%) and a third stayed away for between 7 and 14 nights (34%).

**Table C-6 – Duration of overnight trips (%)**

Base: All respondents on overnight trip from home (100)

	<b>Nights away from home</b>	<b>Nights in Scotland</b>
1 night	11	12
2 nights	18	18
3 nights	11	11
4 to 6 nights	13	13
7 to 14 nights	34	33
15+ nights	14	12
<b>Average:</b>	<b>8.2</b>	<b>8.0</b>

- nil respondents, \* Less than 0.5%

By comparison, the average length of stay amongst all holiday visitors to Scotland was 4.3 nights during 2003 (Source: Tourism in Scotland 2003, VisitScotland).

*Visits to forests*

Visitors on overnight trips were also asked to state the total number of visits they had taken to forests during their current holiday (including their current forest visit). Overall, an average of 4.6 visits were taken to forests with 22% of respondents visiting only one forest while almost half visited woodland on 4 or more occasions (46%).

**Table C-7 – Number of visits taken to forests, including current trip (%)**

Base: All respondents on overnight trip from home (100)

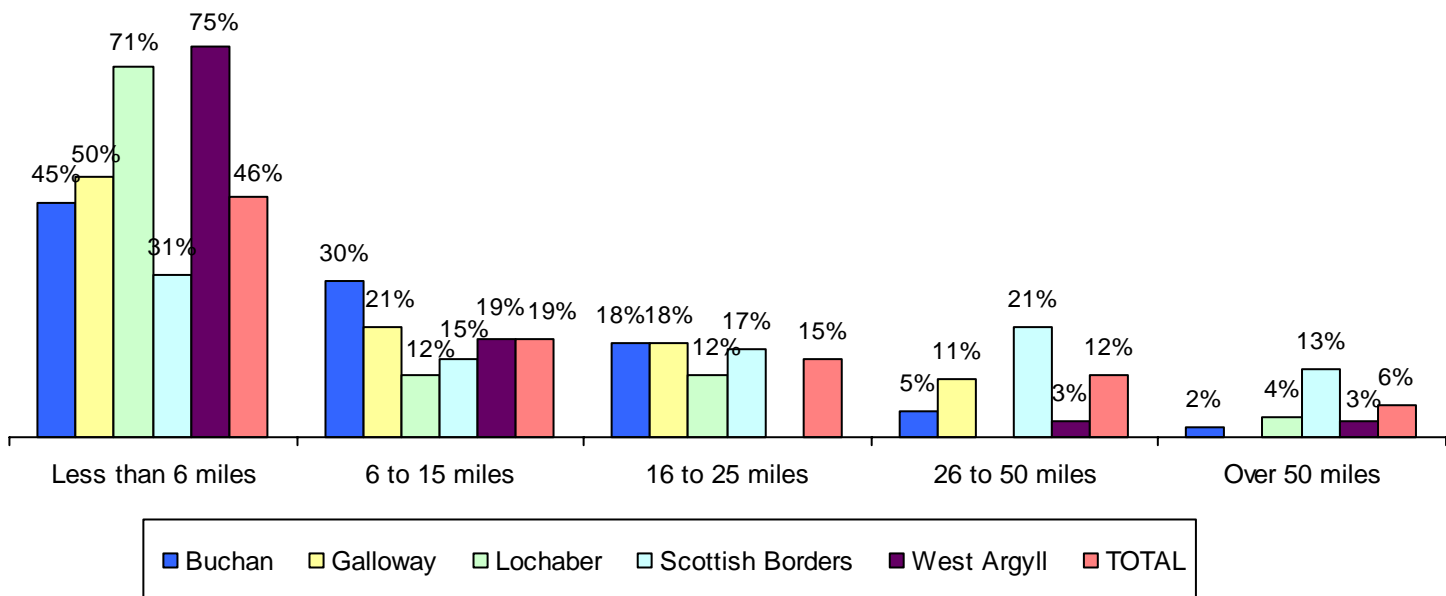
	<b>Visits</b>
1 visit	22
2 or 3 visits	31
4 to 10 visits	38
More than 10 visits	8
Don't Know	1
<b>Average:</b>	<b>4.6</b>

### Travel to the forest

#### *Distance travelled*

All respondents were asked to indicate how far they had travelled to reach the forest, either from their home or the holiday accommodation they had used the previous night.

**Figure C-3 – Distance travelled to reach forest (%)**  
 Base: All respondents (609)





Overall, the largest proportions of visitors had travelled the shortest distances with 46% travelling under 6 miles and 19% travelling between 6 and 15 miles. By comparison, 18% of forest visitors travelled more than 25 miles to reach the forest.

Distances travelled to reach forests varied between districts with the highest proportions of very local users (i.e. travelling under 6 miles from home or holiday accommodation) recorded in West Argyll (75%) and Lochaber (71%) while visitors to forests in the Scottish Borders district were generally more likely to travel further to the forest.

Other variations in the distances travelled by different groups of visitors included:

- *Travelling less than 6 miles* – visitors aged 60 or over, those who walked to the forest, dog walkers and people who visited the forest at least once a week were more likely to have travelled the shortest distances (71%, 95%, 72% and 76% respectively).
- *Travelling over 25 miles* – visitors aged under 35, those on their first visit to the forest and those who took part in cycling or mountain biking were more likely to have travelled over 25 miles that day (34%, 36% and 49% respectively).

#### *Transport used*

As Table C-8 illustrates, the majority of visitors to forests travelled to the forest by car (82%). 15% walked to the forest while much smaller proportions used other types of transport. Notably, fewer than 1% of all visitors used public transport to reach the forest.

**Table C-8 Mode of transport used to reach forest (%)**

Base: All respondents (609)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL
Car/ van	91	84	73	84	59	82
Walked all the way	7	13	14	15	41	15
Bicycle	-	1	6	1	-	1
Minibus/ coach	1	1	-	*	-	1
Motorhome	-	1	6	*	-	1
Public transport	-	-	2	-	-	*

- nil respondents \* fewer than 0.5%

Visitors to forests in the Buchan district were the most likely to travel to the forest by car (91%) while a higher proportion of those visiting forests in West Argyll walked to the forest (41%). Public transport was only used by visitors in the Lochaber district (2%).

Other variations in the types of transport used to reach forests included the following:

- *Travel by car* – day trippers who travelled more than 6 miles, those who took part in cycling or mountain biking whilst in the forest and first time visitors to the forest were more likely to travel by car (96%, 94% and 90% respectively).
- *Walking* – visitors most likely to walk to the forest included day trippers who travelled less than 6 miles, dog walkers and those who visited at least once a week (30%, 24% and 28% respectively).
- *Cycling* – as might be expected, visitors who took part in cycling or mountain biking while in the forest were more likely to cycle to the site (4%).

### **Frequency of visits**

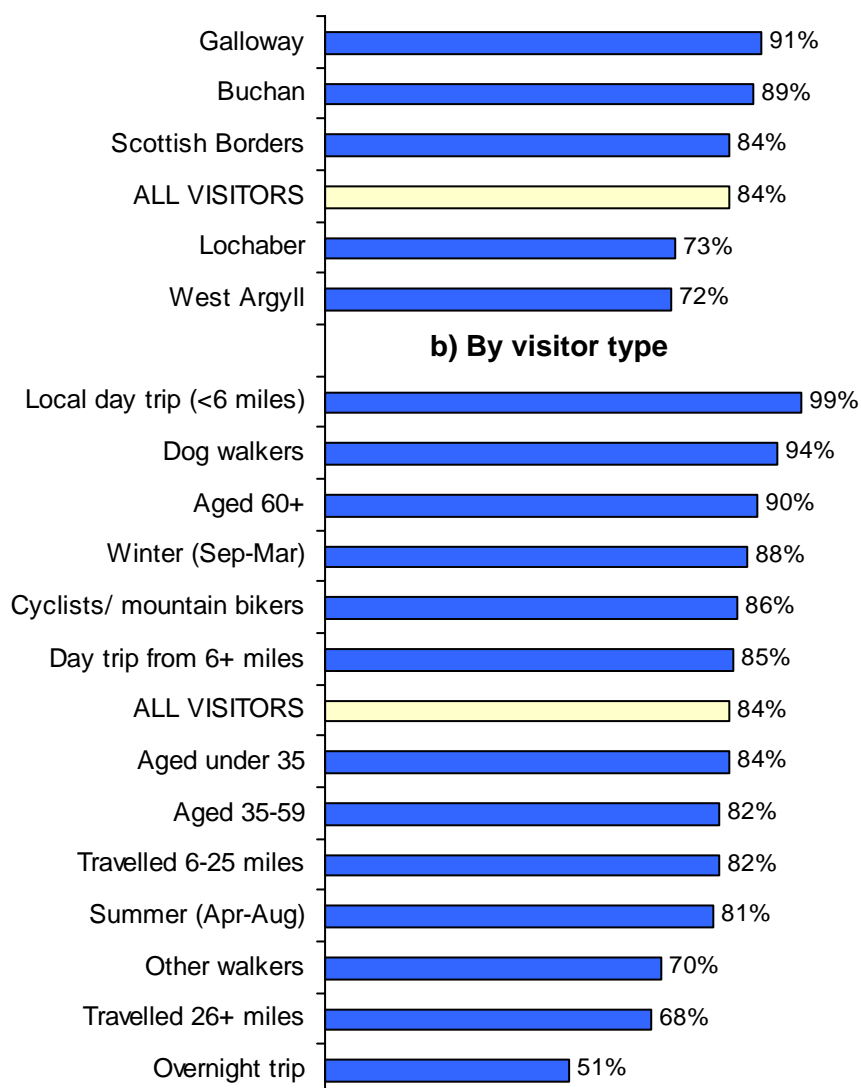
It must be remembered that the sampling frame is **visits** not **visitors**. Those who visit more frequently are more likely to be included in the sample. So the results quoted in this section are not representative of visitors.

Overall, 84% of visitors had been to that particular forest at least once before. However, as the chart below illustrates, the proportion of visitors on repeat visits varied between each of the forest districts and different groups of visitors. Visitors most likely to be on a repeat visit included local day trippers, dog walkers, visitors to the Galloway Forest District and those aged 60 or over (99%, 94%, 91% and 90% respectively). Smaller proportions of those who travelled over 25 miles and those who were on overnight trips had visited the forest before (68% and 51%).

**Figure C-4 –Proportions of repeat visitors (%)**  
Base: All respondents (609)

**a) By location**





Visitors who had been to the forest before were asked to indicate how often they visited the forest. The table below illustrates the proportions of respondents visiting at different levels of frequency and an estimate of the average number of visits made per year on the basis of these responses.

Overall, some 15% of visitors went to the forest at least once a day with 6% stating that they typically visited more than once a day. A further quarter visited 1 to 3 times per week (23%) and 21% visited less often but at least once a month.

The following estimated numbers of visits taken per visitor per year have been applied to each of the possible responses:

- Visit more than once a day = 365 visits per year
- Visit once a day = 350 visits per year
- Visit 1 to 3 times a week = 100 visits per year
- Visit 1 to 3 times a month = 25 visits per year
- Visit 1 to 3 times a year = 2 visits per year
- Less often/ first visit = 1 visit per year

It can therefore be estimated that, across all of the forest districts, visitors typically took around 84 visits to the forest they were interviewed at each year. The highest average number of visits per year were recorded in West Argyll (129 visits) and Galloway (116 visits) while the average number was lowest in the Scottish Borders (58 visits).

**Table C-9 Frequency of visits to forest (%)**

Base: All respondents (609)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL
More than once a day	5	9	4	3	16	6
Once a day	9	17	12	4	13	9
1 to 3 times a week	27	19	20	24	22	23
1 to 3 times a month	18	18	6	30	16	21
1 to 3 times a year	26	24	14	18	6	19
Less often	4	4	12	3	-	4
On first visit ever	11	9	27	16	28	16
<b>Average visits per year:</b>	<b>82</b>	<b>116</b>	<b>83</b>	<b>58</b>	<b>129</b>	<b>84</b>

### Duration of visit

Overall, the average length of visits to forests was 1 hour and 42 minutes. Almost half of visitors spent less than 1 hour (49%), 26% spent between 1 and 2 hours and the remaining 25% spent 2 or more hours.

As the table below illustrates, the average length of a visit varied between the forest districts, with the longest in the Scottish Borders (2hrs 3 mins) and the shortest average in Lochaber (1hr 9 mins), a reflection of the larger proportion visiting for less than 30 minutes (31%).

**Table C-10 Amount of time spent in forest (%)**

Base: All respondents (609)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL
Less than 30 minutes	7	7	31	8	13	11
30 minutes to 1 hour	42	49	37	29	47	38
Over 1 hour to 2 hours	32	23	16	27	28	26
Over 2 hours to 3 hours	10	9	10	20	6	14
Over 3 hours to 4 hours	7	5	4	8	3	6
Over 4 hours	2	7	2	8	3	5
<b>Average duration of visit:</b>	<b>1hr 28m</b>	<b>1hr 42m</b>	<b>1hr 9m</b>	<b>2hrs 3m</b>	<b>1hr 20m</b>	<b>1hr 42m</b>

Further variations in the average duration of visits included the following:

- *Longer than average visits* – visitors in June, July and August (2hrs), visitors on overnight trips (2 hrs 13 mins), visitors who travelled over 25 miles (2 hrs 34 mins), those who visit less than once a week (2 hrs 5 mins) and cyclists/ mountain bikers (2 hrs 46 mins) were most likely to stay in the forest for longer than average.
- *Shorter than average visits* – local day trippers from within 6 miles of the forest (56 minutes), visitors who walked to the forest (1hr 1 min), those who visited at least once a week (1hr 9 mins) and dog walkers (1hr 2 mins) typically spent the least time in the forest.

**Activities undertaken in forest**

The chart below illustrates the main activities undertaken by visitors to forests in Scotland. The most popular activities overall were dog walking (43%), other walking (27%) and cycling/ mountain biking on waymarked tracks (22%).

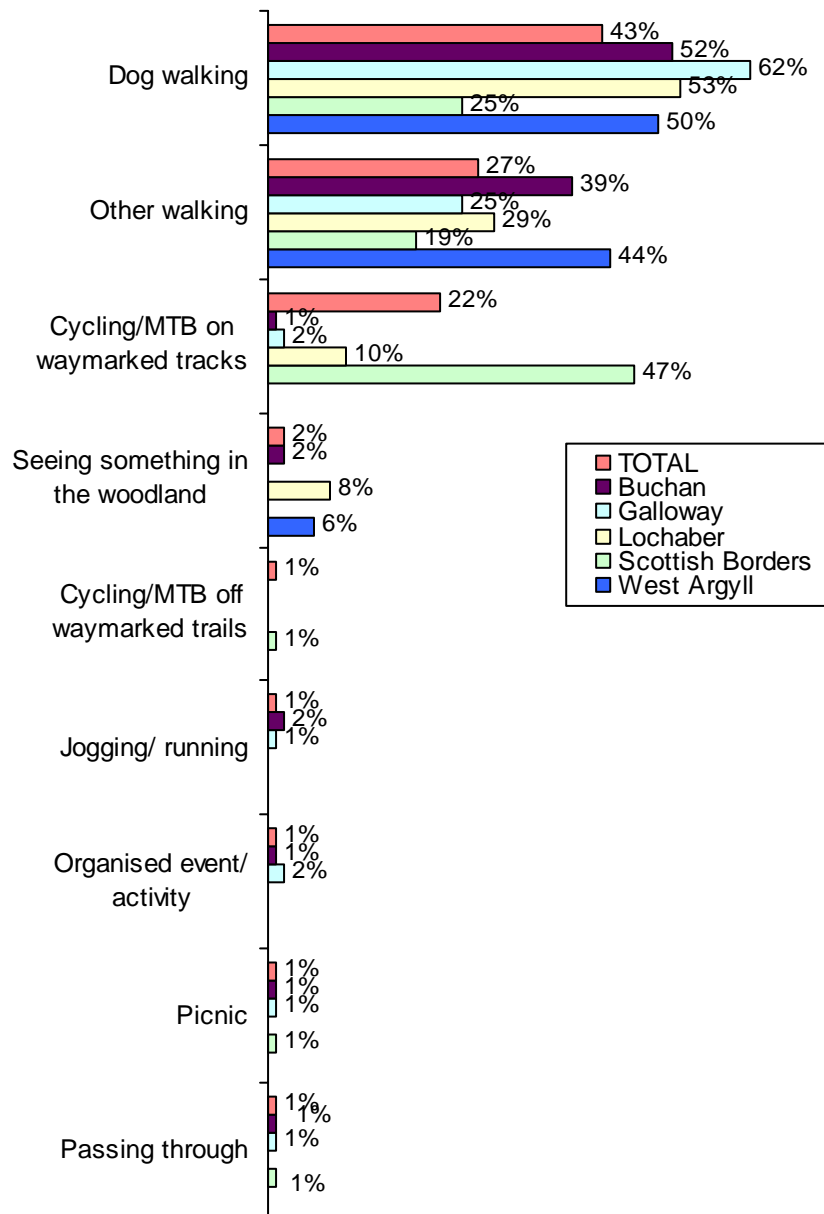
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**Figure C-5 –Activities undertaken in the forest (%)**

Base: All respondents (609)





Levels of participation in each of the activities varied between the forest districts with the highest proportion of dog walkers recorded in Galloway (62%), more people walking without a dog in West Argyll (44%) and almost half of visitors in the Scottish Borders participating in mountain biking or other cycling on waymarked tracks (47%).

Other variations in levels of participation in the main activities included the following:

- *Dog walking (43% overall)* – visitors more likely to take part in dog walking during their visit included local day trippers who lived within 6 miles of the forest (75%), female visitors (57% compared with 35% of males), visitors aged 60 or over (57%), people who walked to the forest (70%) and people who visited at least once a week (72%).
  - *Other walking (27% overall)* – visitors more likely than average to walk *without* a dog included visitors on an overnight trip (36%), those who travelled between 6 and 25 miles to reach the forest (36%) and people on their first visit to the forest (49%).
  - *Cycling/ mountain biking on tracks (22% overall)* – male visitors (29% compared with 7% of females), visitors aged under 35 (49%), not local day trippers (35%) and those who travelled more than 25 miles to the forest (56%) were more likely to take part in cycling or mountain biking during their visit.
-

Table C-11 below compares the key characteristics of participants of the main activities with the profile of all visitors. Dog walkers were generally more likely than participants of the other activities to be female, aged 60 or over, on a local day trip and had the shortest length of visit. By comparison, people who walked without a dog were the most likely to be aged between 35 and 59 while cyclists were the most likely to be male, aged under 35 and on a day trip from further away. Furthermore, cyclists spent the longest duration in the forest.

**Table C-11 – Profile of users by activity (%)**

Base: All respondents (609)/ Dog walkers (241)/ Other walkers (118)/ Cyclists (121)

	All visitors	Dog walking	Other walking	Cycling/ mountain biking
<b>Sex</b>				
Male	65	52	65	88
Female	35	48	35	12
<b>Age</b>				
16-34	23	14	15	53
35-59	59	61	63	47
60+	18	25	22	1
<b>Type of trip</b>				
Local day trip (< 6 miles)	37	65	25	5
Other day trip (6 miles+)	44	25	50	72
Overnight trip	19	11	25	22
<b>Average duration of visit</b>	<b>1hr 42 mins</b>	<b>1hr 2 mins</b>	<b>1hr 53 mins</b>	<b>2hrs 46 mins</b>

### Improvements to forest

When asked what one thing, if anything, could be done to improve the woodland they were visiting, three-fifths of visitors provided a suggestion (62%) while the remaining 38% stated that they could think of nothing or that no improvements were required.

As the table below illustrates, the most frequently provided suggestions related to signposting improvements, improvements to tracks, providing more toilets and improving car park maintenance.

**Table C-12 One thing would like to improve to woodland (%)**

Base: All respondents (609)

	Buchan	Galloway	Lochaber	Scottish Borders	West Argyll	TOTAL
More/ better signposting	7	8	22	5	9	9
More/ better paths	6	6	4	9	6	7
More/ better toilets	9	6	4	3	-	5
Better maintenance of the car park/ entrance	6	4	2	2	9	3
More/better litter bins	2	7	2	2	3	3
Tidy up car parks	4	4	4	1	6	3
More/ better seating	5	1	6	2	-	3
Tidy up walking paths	5	2	2	1	-	2
Provide more facilities	2	-	2	5	3	2
More/ better parking	2	2	4	1	-	2
More variety of trees	2	3	-	3	-	2
More/ better cycle tracks	-	1	-	5	-	2
Cut down some trees	1	2	2	*	6	1
Provide maps/ place to buy maps	1	4	2	1	-	1
Clean up litter	1	2	-	*	3	1
Picnic/ BBQ area	1	1	2	-	3	1
Less dog dirt	3	1	-	-	-	1
Stop/ reduce motorcycle use	-	-	2	1	-	1
<b>Nothing/ fine as it is/ don't know</b>	<b>37</b>	<b>34</b>	<b>33</b>	<b>50</b>	<b>34</b>	<b>38</b>

- nil respondents \* fewer than 0.5%

A full list of the suggestions provided at each of the sites included in the survey is provided separately. However, the following ‘verbatim’ comments illustrate some of the types of suggestions provided.

More or better signposting (9% overall)

*“The paths should be better marked and explained.”* Dunragit, Galloway

*“Clearer signing of routes on the hill. I got lost today.”* Bennachie, Buchan

*“A board to explain where the road goes.”* Kilmichael, West Argyll.

More or better paths (7% overall)

*“Improve the track surface, it’s not good.”* Kilmichael, West Argyll.

*“More separation of bike and walking paths.”* Glentress, Scottish Borders.

*“Open a path through to the village.”* Gartly, Buchan.

More or better toilets (5% overall)

*“Toilets at Buzzard’s nest.”* Glentress, Scottish Borders.

*“Toilets should be open all year.”* Bennachie, Buchan.

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### **Influence of forest**

All respondents were asked to indicate how important the presence of the forest they were visiting and its facilities had been in their decision to come to the area for their day out/ while on holiday.

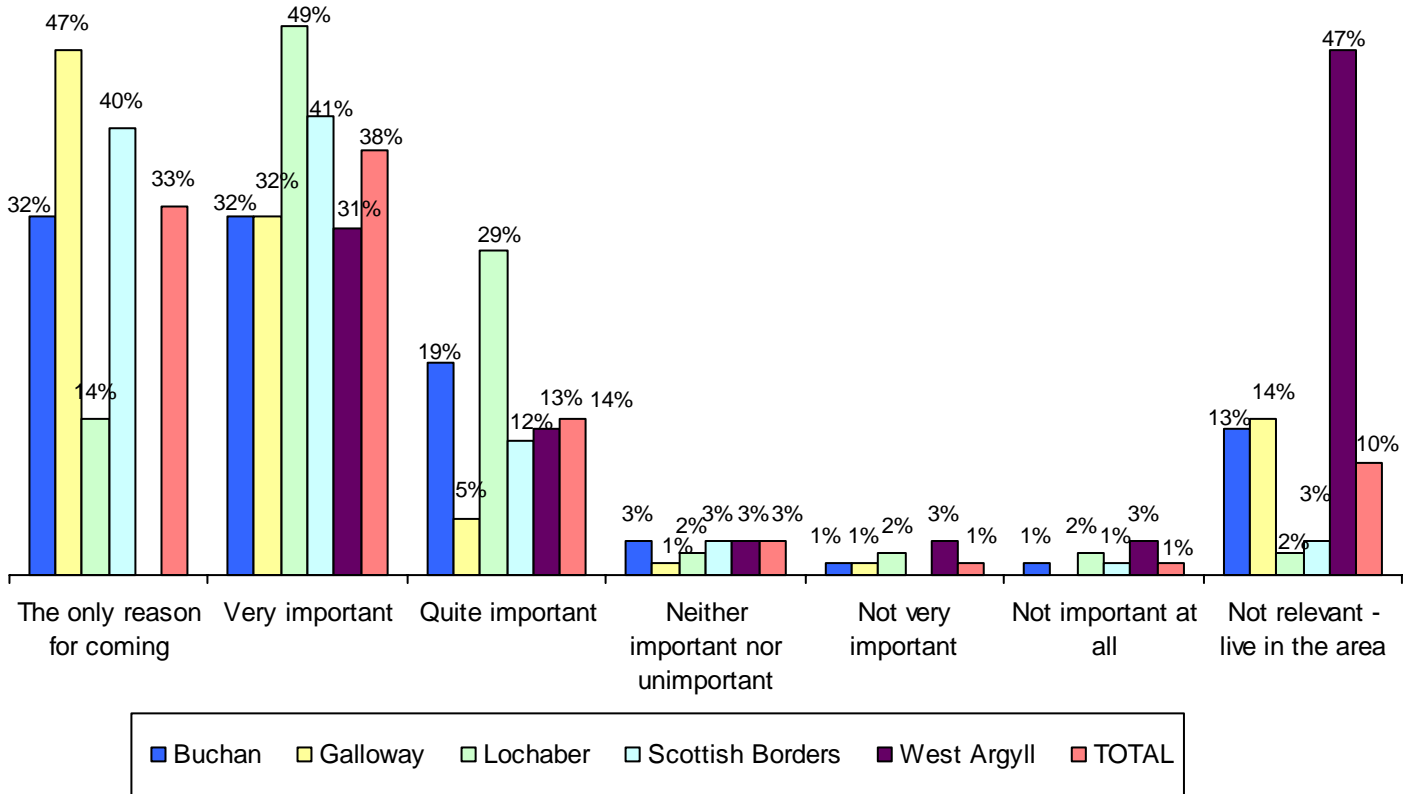
As the chart below illustrates, while 1% of all visitors stated that the forest was 'not important at all' and 10% stated that the forest was 'not relevant' because they lived in the local area, larger proportions indicated that the forest was either their 'only reason for coming' (33%) or 'very important' (38%) in their decision to visit the local area.

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**Figure C-6 – Importance of forest and facilities in decision to visit area**  
Base: All respondents (609)





Some 3 in 10 visitors (30%) stated that the forest and its facilities was either their 'only reason for visiting the area' or 'very important' in their decision *and* they lived at least 6 miles from the forest.

By applying this proportion (30%) to the estimated total number of visits taken to all five of the forest districts surveyed between June 2004 and May 2005 (4 million), it may be estimated that destination choices for at least 1.2 million visits were influenced by the presence of a forest.

## Expenditure and economic impact

### *Average spend per person per day*

All visitors were asked to specify how much money they had personally spent on the following categories that day and, if they were on an overnight trip, how much they had spent on their accommodation the previous night.

Across all respondents (day trippers and visitors on trips away from home), 44% spent nothing while 31% spent less than £20 in total. The average spend per person across all visitors (i.e. including those who spent nothing) was £18.

As the table below illustrates, around a tenth of visitors spent anything on overnight accommodation, with an average spend amongst those who spent anything (i.e. excluding zeros) of £46.

**Table C-13 Expenditure per person per day (row %)**

Base: All respondents (609)

	Nothing	Less than £20	£21 to £50	Over £50	Average (including zeros)	Average (excluding zeros)
Overnight accommodation	87	3	5	3	£6	£46
Food and drink	66	26	4	1	£5	£17
Admission fees	82	16	*	-	<£1	£4
Shopping (non-routine)	89	7	1	1	£2	£23
Transport	58	35	4	1	£4	£10
Equipment	97	1	*	-	<£1	£23
<b>TOTAL</b>	<b>44</b>	<b>31</b>	<b>10</b>	<b>11</b>	<b>£18</b>	<b>£33</b>

- nil respondents \* fewer than 0.5%

Total average spend per person varied between forest district and amongst different groups of visitors with the highest spend per person in Lochaber (£30) and the Scottish Borders (£27) but lower spend in West Argyll (£13), Buchan (£5) and Galloway (£4).

Overall, expenditure was highest amongst males (£20), those aged under 35 (£28), those who travelled 25 miles or more to reach the forest (£33), first time visitors (£44), people on overnight trips (£68) and those who took part in cycling or mountain biking (£36) and lowest amongst local day trippers from within 6 miles of the forest (£1), dog walkers (£6) and those who visited the forest at least once a week (£6).

*Economic benefits of forests*

By applying information on average levels of expenditure per person per day to data relating to the influence of forests on decisions to visit, it is possible to estimate total spend by visitors whose decisions to go to visit the area were affected by the presence of a forest to visit.

The following calculations apply these results to obtain an overall estimate:

- A: Total visits to forests = **4 million**
- B: Proportion of visits taken by people who stated that the forest and its facilities were their *only reason* or *very important* in their decision to visit the area. Excluding people who live locally (i.e. within 6 miles of forest) whose expenditure in the area is likely to have occurred regardless of the presence of the forest = **30%**
- C: Total visits taken due to forests and facilities (A x B) = **1.2 million**
- D: Average spend per person per day amongst those who visited due to forests and facilities = **£19**
- E: Estimated total spend per year by people who visited due to forests and facilities (C x D) = **£23 million**

This calculation suggests that approximately *£23 million* was spent by visitors who were influenced to take their visit to an area due to the forest and its facilities. This expenditure was made during the day of the forest visit and included overnight accommodation, food and drink, transport and non-routine shopping.

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## D. Summary of results by forest district

The following table provides a summary of the key characteristics and variations in results obtained for each of the five forest districts.

	<b>Buchan</b>	<b>Galloway</b>	<b>Lochaber</b>	<b>Scottish Borders</b>	<b>West Argyll</b>
<i>Estimated total visits</i>	694,000	812,000	559,000	1,676,000	292,000
<i>Sex</i>	Fairly even male/female split.	Almost two in three visitors are male (63%).	Fairly even male/female split.	Almost two in three visitors are male (65%).	Fairly even male/female split.
<i>Age</i>	A fifth aged 60+ (20%).	19% of visitors aged under 16.	Large proportion aged 60+ (24%).	Large proportion aged 16 to 34 (35%).	Large proportion of children under 16 (21%).
<i>Type of trip</i>	About half on local day trips (45%), very few on holiday (3%).	About half on local day trips (47%).	Half on overnight trips (51%). Very few non-local day trippers.	Majority of visitors on day trips from non-local base (60%).	Most visitors on local day trips (56%) or on holiday (31%). Very few non-local day trippers.
<i>Travel to forest</i>	Almost a third travel 6 to 15 miles to forest (30%).	Half travel less than 6 miles (50%) but 11% travel over 25 miles.	Almost three quarters travel less than 6 miles to reach forest (71%).	Travel the furthest to reach forest (44% over 25 miles).	Three quarters travel less than 6 miles to reach forest (75%).
<i>Transport used</i>	Vast majority travel by car/van (91%).	Majority travel by car/van (84%) but 13% walk.	A fifth either walk (14%) or cycle (6%) to forest.	Majority travel by car/van (84%) but 15% walk.	Large proportion walk all the way to forest (41%).
<i>Frequency of visits</i>	High proportion of repeat visitors (89%) but fairly infrequent visits.	Highest proportion of regular, repeat visitors (91% repeat, 26% every day).	High proportion of first time visitors (27%) and fairly infrequent repeat visitors.	84% on repeat visits but lowest frequency of trips.	Mix of first time visitors (28%) and regular repeat visitors (28% every day).
<i>Duration of visits</i>	Average 1hr 28 mins.	Average 1hr 42 mins.	Shortest duration of visit – 1hr 9mins.	Longest duration of visit – 2hrs 3mins.	Average 1hr 20 mins.
<i>Activities undertaken</i>	Majority walking with or without a dog (52% and 39% respectively).	Highest proportion of dog walkers (62%).	Wide variety of activities – 53% dog walking, 29% other walking, 10% cycling, 8% seeing something in the forest.	Highest proportion of cyclists/mountain bikers (47%).	Highest proportion of people walking without a dog (44%).
<i>Expenditure per day</i>	£5	£4	£30	£27	£13

## **E. Appendices**

- 1. All Forests Methodology Guidance**
  - 2. Questionnaire**
  - 3. Contact Sheet**
  - 4. Count Sheet**
  - 5. Example of a forest block**
  - 6. Confidence intervals for volume of visitors**
-



## **Appendix 1 - All Forests Methodology Guidance**

### **1. Introduction**

These guidance notes outline the visitor monitoring methodology which aims to predict visitor numbers in Scotland.

Significant changes to the previous monitoring system have been made. These include changing to a national survey and placing greater emphasis on the accuracy of the visitor number data. The survey will run over a 3 year period.

Forest Enterprise (FE) has been collecting visitor monitoring information throughout Great Britain since 1996. There were 2 main elements to the programme:

- interviewer based surveys

This programme operated annually with around 12 Forest Districts (Forest Districts are management areas – 30 across GB) taking part each year, so that all Forest Districts were covered within three years. Generally, however, only one or two sites per Forest District were monitored each time. The aim was to find out about the types of visitors using FE woodlands.

- counting numbers of visitors at a range of sites

This programme operated in all Forest Districts with around 140 mechanical counters installed on a permanent basis. The national aim was to measure changes in visitor numbers between years at the selected sites where counters were installed. The counter data also met some local needs.

### **2. Purpose of survey**

The previous visitor monitoring approach focused on a core number of high-developed sites. Generally we know little about visitor use elsewhere and in particular about local use of woodlands.

The purpose of the method outlined here is to provide more reliable estimates of visitor numbers, visitor activities and profiles of different types of visitors.

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The sampling will apply the same amount of effort to each selected forest block within the Forest District. Blocks will be categorised by their local population density and their level of use. This will allow for comparisons to be made between blocks with similar characteristics.

### 3.0 All Sites

The aim of this survey is to provide more reliable estimates of visitor numbers, visitor activities and profiles of different types of visitors than previously. It will be applied across the whole FC estate in Scotland over a three year period, starting in spring 2004 and will take into account the whole range of forest types. Five Forest Districts in Scotland will be covered each year.

The basis of this programme will be forest blocks and access points within forest blocks. Blocks will be categorised by their level and type of use on the basis of local judgement. Local categorisation should allow for greater stratification of forest blocks within districts and across the country than if countrywide measures were applied.

Sampling will take place at all access points within a sample of blocks from each Forest District (typically 20% of a district's blocks) and a statistical model will be developed to apply the information gathered across similar access points and similar blocks within the district.

### 3.1 Blocks

Forest Districts will stratify their forests into blocks. A block is an area (of whole compartments) in which most visitors would be expected to stay in one visit. The block will be categorised by level of population (within 15km) and level of use. Level of use and population density will be categorised as high, medium or low and will be based on local perception. A range of data will be gathered for each block by completing the Block Spreadsheet. This will include information such as the types of facilities available and types and numbers of access points. In addition some of the block characteristics are also required. These include whether the block is freehold or leasehold, and local staff's perception of whether it is used predominantly by locals or holidaymakers.

On the basis of the above information FC Economics & Statistics, FC Scotland and the district will choose blocks to be surveyed. Choices will be aimed at providing a range of use and population levels and a range of locations across the district. Approximately 20% of a district's blocks will be selected for sampling.

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When a leasehold block is selected for survey the district should notify the landowner, in advance, that the work is due to go ahead.

### 3.2 Access Points

For each of the blocks selected for survey, information about the block's access points will be gathered by Forest Districts and entered into the Access Point Spreadsheet. This will include information such as access point type (official car park, unofficial car park, other entrance, or 'permeable boundary' (see below)) and a grid reference for each access point. Completing this spreadsheet will generate a unique reference number for each access point in the FE estate. This will be used during information gathering and analysis.

In addition Forest Districts will produce maps to show the blocks to be surveyed with the access points, the access point code and each access point's unique number marked.

Permeable boundaries will be treated separately. For mapping they will be shown as a line and given one access code. Where entry points can be identified they will be assigned as an access point and each access point will be treated as described above. If the permeable boundary cannot be treated by this method a separate methodology will be prepared.

### 3.3 Selecting blocks

As noted in section 3.1, about 20% of each Forest District's blocks will be sampled. This will give around five to ten blocks per district to be monitored.

The matrix below will be used as an idealised template for selecting the proportion of blocks in each category to be sampled. We wish to choose blocks to sample in the same proportions as indicated here. As it is likely that a Forest District's blocks won't be spread evenly across the matrix we will take account of the actual number of blocks in each cell and some adjustment will be required when selecting blocks.

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BLOCK SELECTION MATRIX		USAGE		
		HIGH	MEDIUM	LOW
POPULATION	HIGH	2		1
	MEDIUM			
	LOW	2		1

Unusually busy blocks may have to be treated separately and may require a slightly different sampling system. In most cases we will wish to sample these blocks. Other 'atypical' blocks also require consideration, for example blocks where there is only limited access, or blocks where more than half, say, of the boundary is permeable.

### 3.4 Sampling procedure

Sections 4.3a and 4.3b below set out the system that will be used in the 2004 programme contract for counting and interviewing. Monitoring will follow a predetermined programme and will take place whatever the weather conditions.

## 4.0 Sampling

### 4.1 Contract for All Forests Monitoring Methodology

The fieldwork will run for a full 3 year period, from June 2004 to May 2007.

While Forestry Commission Scotland will set out the sampling systems and locations and provide all relevant background information, contractors will be expected to adopt a flexible approach. In particular, FC Scotland, FC Economics & Statistics and the contractors will meet in August 2004 to discuss progress and any issues which have arisen during the first few weeks of fieldwork. As a result, some modifications to the schedules may be required.

## 4.2 Sites for Monitoring

For the 5 Forest Districts to be monitored in the first year, FC Scotland and Economics & Statistics have selected 20% of each district's forest blocks for sampling. Each block has been categorised based on level of use (high, medium or low) and population level within 15km (high, medium or low). Paragraph 3.1 describes the methodology for selecting blocks.

Within each block access points have been split into the following codes:

- A = official car park
- B = unofficial car park
- C = other entrance
- D = permeable boundary

Every access point in the selected forest blocks must be monitored. Monitoring will consist of counting visitor numbers into and out of access points and also conducting visitor surveys at access points.

Contractors will be supplied with maps showing the location of blocks and access points.

## 4.3 Monitoring System

Observations (counts and interviews) need to be recorded at a variety of dates and times. The observation periods that must be covered are:

- weekdays
  - Saturdays
  - Sundays
  - early (sunrise-1000)
  - middle (1000-1600)
  - late (1600-sunset).
-

Monitoring will be set out in a predetermined programme. An example template is shown below. As part of the contract, the contractor will draw up a timetable for each Forest District in Scotland and agree it with FC Scotland before the monitoring starts each year. A timetable is not required as part of the tender.

#### a. Counting

Counting will be carried out at all the access points for the selected blocks. Each access point will have a total of 9 count observations (each lasting one hour) spread throughout the 12-month period (including public holidays) and across the three time periods and in each of the three 'day of week' periods. Around 60% of the counting observation periods will take place during the "middle" time period, with the remaining 40% split between the "early" and "late" time periods.

The matrix below gives an example of how the times and days might be distributed throughout the 12-month period. Access point 1 from block 1 (\*), and access point 2 from block 1(♣) are indicated. They cover all time periods and all 'day of week' options and are spread over the 12-month fieldwork period.



Each time an access point has an 'early' slot it should try to be at a different hour during the early period, for example the first one could be 0800-0900 and the second 0900-1000. Similarly for 'mid' and 'late' slots.

Each access point should be added in a similar manner to (an extended version of) the grid above. It should be possible for one counter to complete 6 counting periods in one day, at different access points. Obviously the geographic location of access points to be surveyed in any one day will need to be considered. At any time we only want to be counting at one access point in each block. E.G. On a specific day at 10am counting can be going on at Block 1, Access point 1 and Block 2 access point 1, but not at Block 1 access point 1 and Block1 access point 2.

Counts and observations will be made of people entering **and** leaving the access point.

#### b. Interviewing

Interviewing will take place at each access point at the same time as counting is undertaken. It is hoped that a minimum of 100 interviews will be completed at the majority of forest blocks.

Interviews will be conducted as people **exit** the forest. The questionnaire to be used will be agreed with contractors prior to the start of fieldwork. An example questionnaire is provided in Appendix 2. However, the questionnaire should be further developed to enable spending by visitors during their stay in the area to be estimated.

#### 4.4 Recording and Return of Data

Count and interview observations will be recorded as described above (4.3a and 4.3b). The data should be input and supplied electronically to FC Economics & Statistics in a format which can be imported into SAS analysis system.

It is important that information collected in the first few weeks of fieldwork is copied to FC Economics & Statistics in advance of the first progress meeting, to permit exploration of the data prior to that meeting.

#### 4.5 Contact with Forest Districts

Contractors will liase on a weekly basis with the relevant Forest Districts. They should contact the Forest District on Friday morning each week to let the district know their

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timetable for the following week. The district will provide information on any forest activity that may affect the contractor and the observations.

In addition, when the contractor contacts the district each Friday, the district will let them know of any permitted events/activity that are due to take place in the survey blocks. The information will include the type of event/activity, the date, the block and the expected numbers. The contractor will note this on the relevant batch sheet(s)

The Forest District will supply the contractor with copies of local leaflets for issue to the public if information is requested.

Contractors should carry photo identification at all times.

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**Appendix 2 – Questionnaire**

<b>FORESTRY COMMISSION VISITOR MONITORING SCOTLAND (015794) - YEAR 1</b>						<b>OFFICE USE ONLY</b> (1 - 6) 015794 (7-10) - - - - (11) 1					
Name.....						(12)					
Address.....						<b>Sex:</b> Male 1 Female 2					
Postcode <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>						<b>Location code:</b> (see instructions)					
(27) (28) (29) (30) (31) (32) (33)						<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>					
(13) (14) (15) (16) (17) (18) (19) (20) (21)											
Telephone number.....											
<b>Date of interview</b>		Day		Month		<b>Age:</b>		(22)			
		<input type="text"/> <input type="text"/>		<input type="text"/>				16-24 1			
		(34) (35)		(36)				25-34 2			
		(24 hours clock)						35-44 3			
<b>Time of interview</b>		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>						45-59 4			
		(37) (38) (39) (40)						60+ 5			
<b>Place of residence:</b> (from address)											
(41)											
.....											
(42)											
<b>SHOW CARD H</b>											
Please indicate which of the following ethnic groups you consider that you belong to.											
<b>White</b>		(23)		<b>Black, Black Scottish, Black Welsh, Black English or other Black British</b>		(24)					
Scottish		1		Caribbean		1					
Welsh		2		African		2					
English		3		Any other Black background (WRITE IN)		3					
Other British		4		.....							
Irish		5		<b>Mixed</b>							
Any other White background (WRITE IN)		6		Any Mixed background (WRITE IN)		4					
.....				.....							
<b>Asian, Asian Scottish, Asian Welsh, Asian English or other Asian British</b>				<b>Other ethnic background (WRITE IN)</b>		(25) (26)					
Indian		7		.....							
Pakistani		8									
Bangladeshi		9									
Chinese		0									
Any other Asian background (WRITE IN)		X									
.....											

DECLARATION: Interview conducted by me with respondent named above in accordance with instructions and MRS Code of Conduct

Interviewer..... Interviewer ID..... Date.....

*Good Morning/Afternoon/Evening. I am conducting a survey on behalf of TNS Travel and Tourism on behalf of the Forestry Commission. The survey is to find out about who visits Forestry Commission woodland in Scotland and their reasons and frequency of their visits, and I would like to ask you a few questions.*

*The interview length depends on the answers you provide, but will last on average 8 to 10 minutes.*

*Here is a leaflet that explains your rights under our industry code and the data protection act.*

First of all, can I check that you have not been interviewed already at this woodland site?

Yes – been interviewed already	1	Close
-----	-----	-----
No – not been interviewed	2	Continue

Q.1a)	Have you travelled from home today?		(43)
		Yes	1
		-----	-----
		No	2
Q.1b)	And will you be returning home later today?		(44)
		Yes	1
		-----	-----
		No	2

<p><b>IF RESPONDENT HAS TRAVELLED FROM HOME AND IS RETURNING HOME TODAY (CODE 1 AT Q.1a AND Q.1b) GO TO Q3.</b></p> <p><b>IF RESPONDENT HAS NOT TRAVELLED FROM HOME AND/OR IS NOT RETURNING HOME TONIGHT (CODE 2 AT Q1a AND/OR Q1b) ASK Q2</b></p>
--

**SHOW CARD A**

**IF RESPONDENT DID NOT TRAVEL FROM HOME TODAY ASK:**

Q.2a) What type of accommodation did you stay in last night?

**ALTERNATIVELY, IF RESPONDENT TRAVELLED FROM HOME BUT IS NOT RETURNING TONIGHT ASK:**

What type of accommodation will you stay in tonight?

SINGLE CODE		(45)
	Tent/Caravan/Cabin	1
	Guest House/Bed and Breakfast	2
	Hotel	3
	Staying with friends/relatives	4
	Youth Hostel/Outdoor Centre	5
	Self-catering	6

Other (SPECIFY)

.....

Q.2b) How many nights in total will you be spending **away from home** during your current trip?

WRITE IN 

(46)	(47)
------	------

Q.2c) And how many nights of these nights, if any, will you be spending **in Scotland**?

WRITE IN 

(48)	(49)
------	------

Q.2d) During your trip away from home, how many times will you set out specifically to visit a forest or wood? Please include your current trip.

**REMEMBER TO INCLUDE CURRENT FOREST VISIT.**

WRITE IN 

(50)	(51)
------	------

Q.3

**ASK ALL  
SHOW CARD B**

How far did you travel to get here today, from your home or accommodation?

- SINGLE CODE. NOTE - THIS IS ONE DIRECTION ONLY. (52)
- Less than 6 miles/ 10 km 1
  - 6 to 15 miles/ 11 to 25 km 2
  - 16 to 25 miles/ 26 to 40 km 3
  - 26 to 50 miles/ 41 to 80 km 4
  - Over 50 miles/ Over 80 km 5
  - Don't Know Y

Q.4

**SHOW CARD C**

What was the **main** type of transport you used to get here today?

- SINGLE CODE TRANSPORT USED TO TRAVEL THE LONGEST PART OF THEIR JOURNEY (53)
- Car/ Van 1
  - Minibus/Coach 2
  - Public transport (scheduled bus, train, taxi, etc.) 3
  - Bicycle 4
  - Walked 5

Other (SPECIFY) (54) (55)

.....

Q.5a)

Have you been to *this woodland site/ here*\* before?

\*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE'

Yes	(56)	
-----	1	Ask Q5b
No	2	-----
		Skip to Q6

**IF NO, SKIP TO Q.6**

- SHOW CARD D**
- Q.5b) How often, on average, do you come here?  
SINGLE CODE (57)
- |                      |   |
|----------------------|---|
| More than once a day | 1 |
| Once a day           | 2 |
| 1 to 3 times a week  | 3 |
| 1 to 3 times a month | 4 |
| 1 to 3 times a year  | 5 |
| Less often           | 6 |
| Don't Know           | Y |

- ASK ALL**
- Q.6 **SHOW CARD E**  
What was your **main** activity during your visit today?  
SINGLE CODE (58)
- |   |   |
|---|---|
| Dog walking   | 1 |
| Other walking   | 2 |
| Cycling/ Mountainbiking <u>on</u> waymarked tracks                          | 3 |
| Cycling/ Mountainbiking <u>off</u> waymarked tracks                         | 4 |
| Horse riding  | 5 |
| Picnic  | 6 |
| Seeing something in the woodland (e.g sculptures, ancient tree, waterfalls) | 7 |
| Just passing through  | 8 |
- An organised event (PLEASE SPECIFY) (59)
- .....
- Other activity (SPECIFY)
- .....

- Q.7 How long have you been in *this woodland/ here\** today?  
\*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE'
- |                                     |       |           |
|-------------------------------------|-------|-----------|
| RECORD TO THE NEAREST<br>15 MINUTES | Hours | Minutes   |
|                                     |       |           |
|                                     | (60)  | (61) (62) |

- Q.8a) Do you (or anyone else in your group) have a disability or special needs?
- |  |     |           |            |
|--|-----|-----------|------------|
|  | Yes | (63)<br>1 | Ask Q8b    |
|  | No  | 2         | Skip to Q9 |

**IF NO, GO TO Q9**

Q.8b) What type of disability or special need, do you (or anyone in your group) have?  
**CODE ALL MENTIONED**

Sight	1	(64)
Hearing	2	
Mobility	3	
Other (SPECIFY)	4	

.....

**ASK ALL**  
 Q.9 If we could improve just **one** thing about *this woodland/ here\**, what should it be?  
**SINGLE THING ONLY**

.....	(66)
.....	(67)
.....	(68)

**SHOW CARD F**  
 Q.10 How important was the presence of this forest and its facilities in your decision..  
**DAY TRIPPERS:** to come to this area for a day out?  
**THOSE STAYING AWAY FROM HOME:** to visit this area while on holiday?  
**SINGLE CODE**

The only reason for coming	1	(69)
Very important	2	
Quite important	3	
Neither important nor unimportant	4	
Not very important	5	
Not important at all	6	
Not relevant – I live in this area	7	
Don't know	Y	

.11 Next I would like to ask you about your spending **TODAY**.

<b>OFFICE USE ONLY</b>	
(1 - 10) REPEAT	
(11) 2	

<b>IF NOT STAYING AWAY FROM HOME (CODE 1 AT Q1A and Q1B) SKIP TO Q11B)</b>
--

.11a) How much did you **personally** spend on accommodation (including food and drink at the accommodation) **LAST NIGHT**?

**OR**

**IF RESPONDENT HAS NOT YET SPENT A NIGHT AWAY FROM HOME**

How much do you personally expect to spend on accommodation (including food and drink at the accommodation) **TONIGHT**? Please **include** the amount spent/you will spend on any others (adults and children) for whom you have paid/will pay. If you are on a business trip please include any expenditure paid for by your company.

WRITE IN BELOW UNDER APPROPRIATE AREA. IF RESPONDENT DOES NOT KNOW EXACT AMOUNT AN ESTIMATE WILL DO. DO **NOT** LEAVE BLANK. IF NOTHING WRITE IN 0 0 0. IF DON'T KNOW WRITE IN YYY

11(b-h) **ASK ALL, SHOW CARD G**

Can you tell me how much you **PERSONALLY** have spent/will spend **TODAY** on each of the following categories. That is the amount you have spent today already plus that which you will spend later today. Please **include** the amount spent/you will spend on any others (adults and children) for whom you have paid/will pay. If you are on a business trip please include any expenditure paid for by your company.

IF RESPONDENT IS UNABLE TO GIVE SPENDING ON EACH CATEGORY ASK FOR THEIR TOTAL SPENDING TODAY

WRITE IN BELOW UNDER APPROPRIATE AREA. IF RESPONDENT DOES NOT KNOW EXACT AMOUNT AN ESTIMATE WILL DO. DO **NOT** LEAVE BLANK.

IF NOTHING WRITE IN 0 0 0. IF DON'T KNOW WRITE IN D/K

	£		
a) Accommodation (incl. food & drink)	12	13	14
b) Food and drink (excluding at accommodation)	15	16	17
c) Admission fees (to attractions)	18	19	20
d) Shopping (non-routine, e.g. souvenirs)	21	22	23
e) Transport (including, petrol, taxis, public transport etc)	24	25	26
f) Equipment (e.g. hire of boat, horse-riding)	27	28	29
g) Other miscellaneous items	30	31	32
h) <b>TOTAL</b>	33	34	35

- Q.12a) Can you tell me the age group and sex of all the people with you on this visit.  
Please remember to **include** yourself. CODE BELOW  
IF IN A LARGE GROUP/IN A COACH PARTY ONLY RECORD DETAILS OF THE  
IMMEDIATE PARTY

	Male	Female
Under 5 years	(36)	(44)
5 – 10 years	(37)	(45)
11 – 15 years	(38)	(46)
16 – 24 years	(39)	(47)
25 – 34 years	(40)	(48)
35 – 44 years	(41)	(49)
45 – 59 years	(42)	(50)
60+ years	(43)	(51)

- Q.12b) ALSO PLEASE RECORD THE NUMBER OF DOGS, BICYCLES AND /OR  
HORSES WITH RESPONDENT  
WRITE IN BELOW IF NONE WRITE IN 0

Dogs	(52)
Bicycles	(53)
Horses	(54)

**COLLECT CLASSIFICATION DETAILS AND THANK RESPONDENT**



**Appendix 3 – Contact sheet**

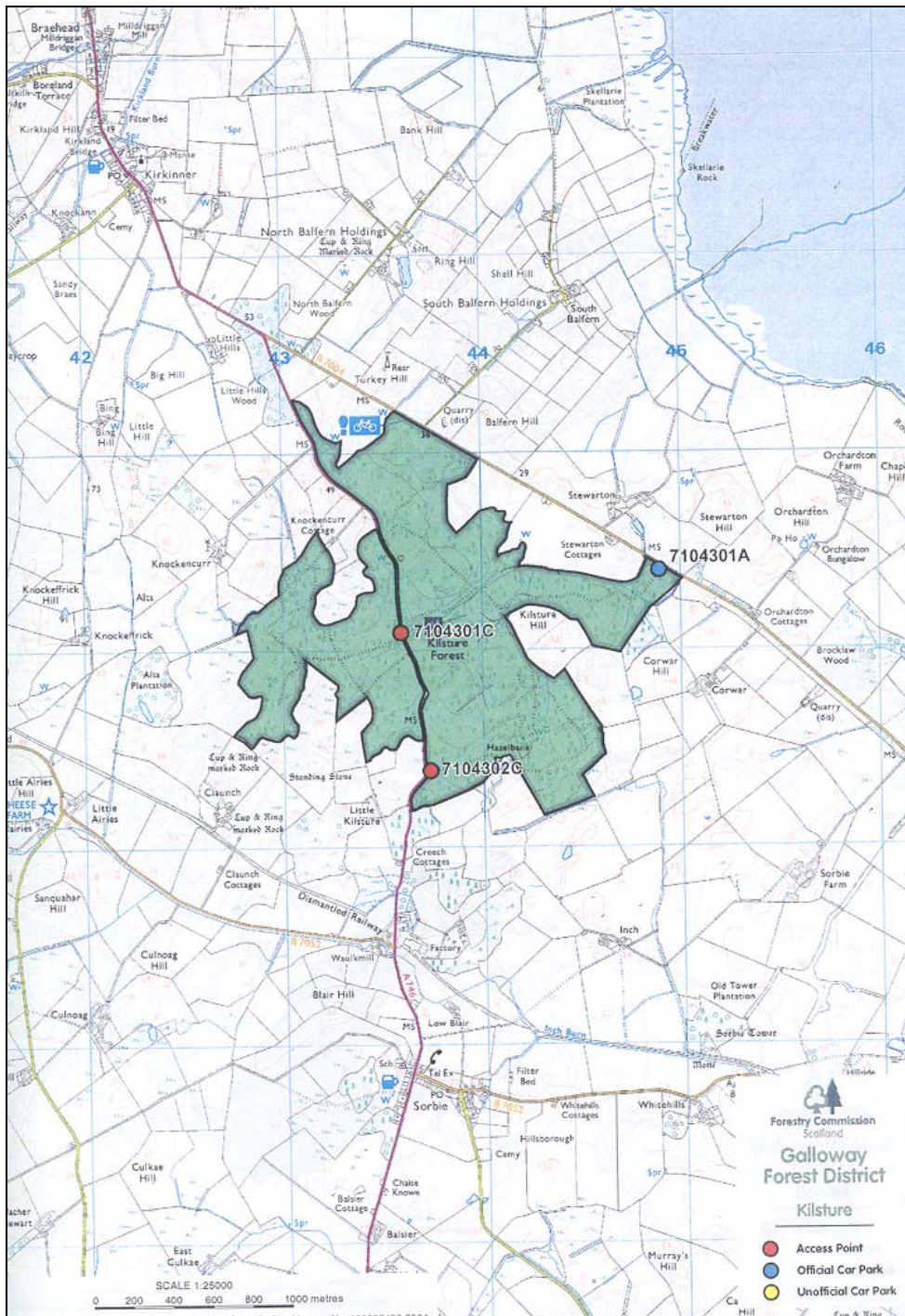
<p><b>FORESTRY COMMISSION VISITOR MONITORING – SCOTLAND</b>  <b>YEAR 1</b>  <b>(015794)</b>  <b>CONTACT SHEET</b></p>	<p><b>OFFICE USE ONLY</b>                  (1-7) 015794A                  (8-11) _ _ _ _</p>																																
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(13)	(14)	(15)	(16)	(17)	(18)	(19)	(20)																										
<p><b>Date of interview shift</b></p> <table style="margin-left: 100px;"> <tr> <td style="text-align: center;"><b>Day</b></td> <td style="text-align: center;"><b>Month</b></td> </tr> <tr> <td style="text-align: center;"> <table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr><td style="text-align: center;">(21)</td></tr> </table> <table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr><td style="text-align: center;">(22)</td></tr> </table> </td> <td style="text-align: center;"> <table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr><td style="text-align: center;">(23)</td></tr> </table> </td> </tr> </table>	<b>Day</b>	<b>Month</b>	<table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr><td style="text-align: center;">(21)</td></tr> </table> <table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr><td style="text-align: center;">(22)</td></tr> </table>	(21)	(22)	<table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr><td style="text-align: center;">(23)</td></tr> </table>	(23)	<p><b>Interview shift <u>start</u> time</b></p> <table border="1" style="margin-left: 100px; width: 150px;"> <tr> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> <td style="width: 25px; height: 20px;"></td> </tr> <tr> <td style="text-align: center;">(24)</td> <td style="text-align: center;">(25)</td> <td style="text-align: center;">(26)</td> <td style="text-align: center;">(27)</td> </tr> </table> <p style="text-align: right;">(24 hour clock)</p>					(24)	(25)	(26)	(27)																	
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<p><b>Number of completed interviews</b></p> <table style="margin-left: 100px;"> <tr> <td style="width: 40px; height: 20px;"></td> <td style="text-align: right;">(36)</td> </tr> </table>		(36)	<p><b>Total number of refusals</b></p> <table style="margin-left: 100px;"> <tr> <td style="width: 40px; height: 20px;"></td> <td style="text-align: right;">(37)</td> </tr> </table>		(37)																												
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<p><i>Reasons for refusals:</i></p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div>																																	
<p><b>Special events</b>                  IF THERE IS A SPECIAL EVENT ON DURING YOUR SHIFT PLEASE RECORD DETAILS OF NAME OF EVENT, TYPE OF EVENT AND ESTIMATED NUMBERS ATTENDING.</p> <div style="border: 1px solid black; height: 30px; width: 100%;"></div>																																	
<p><b>Comments on shift</b>                  PLEASE PROVIDE DETAILS OF ANY PROBLEMS ENCOUNTERED DURING YOUR SHIFT SUCH AS LACK OF VISITORS TO INTERVIEW, PROBLEMS WITH INTERVIEW LOCATION ETC.</p> <div style="border: 1px solid black; height: 60px; width: 100%;"></div>																																	

Interviewer..... ID ..... Date.....

**Appendix 4 – Count sheet**

<b>FORESTRY COMMISSION VISITOR MONITORING – SCOTLAND YEAR 1 (015794) COUNT SHEET</b>										<b>OFFICE USE ONLY</b> (1-7) 015794B (8-11) _ _ _ _																	
<b>Location Code</b> <table border="1" style="width: 100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> <td style="width: 12.5%;"></td> </tr> </table>																<b>Counter (initials)</b> _____											
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<b>Date of counts</b>		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="text-align: center;"><b>Day</b></td> <td colspan="2" style="text-align: center;"><b>Month</b></td> </tr> <tr> <td style="width: 50%;"></td> <td style="width: 50%;"></td> <td style="width: 50%;"></td> <td style="width: 50%;"></td> </tr> <tr> <td style="text-align: center;">(21)</td> <td style="text-align: center;">(22)</td> <td style="text-align: center;">(23)</td> <td style="text-align: center;">(23)</td> </tr> </table>				<b>Day</b>		<b>Month</b>						(21)	(22)	(23)	(23)										
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		Sunny		1	2	3	Overcast		(34)																		
		Calm		1	2	3	Windy		(35)																		
<b>Parked cars</b> IF YOU ARE AT A CAR PARK ENTRANCE (OFFICIAL OR UNOFFICIAL) PLEASE RECORD THE NUMBER OF CARS PRESENT AT THE START AND END TIMES.																											
<b>Number of cars at start</b>				<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"></td> <td style="width: 33%;"></td> <td style="width: 33%;"></td> </tr> <tr> <td style="text-align: center;">(36)</td> <td style="text-align: center;">(37)</td> <td style="text-align: center;">(38)</td> </tr> </table>							(36)	(37)	(38)	<b>Number of cars at end</b>				<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;"></td> <td style="width: 33%;"></td> <td style="width: 33%;"></td> </tr> <tr> <td style="text-align: center;">(39)</td> <td style="text-align: center;">(40)</td> <td style="text-align: center;">(41)</td> </tr> </table>							(39)	(40)	(41)
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<b>WRITE IN TOTALS FROM COUNT SHEETS AT THE END OF 1 HOUR PERIOD (REMEMBER TO INCLUDE ANY CONTINUATION SHEETS USED) :</b>																											
<b>ENTERING</b>							<b>LEAVING</b>																				
Visitors							Visitors																				
On foot	On bike	On horse	Staff	Dogs	Prams	Wheel-chairs	On foot	On bike	On horse	Staff	Dogs	Prams	Wheel-chairs														
(42)	(43)	(44)	(45)	(46)	(47)	(48)	(49)	(50)	(51)	(52)	(53)	(54)	(55)														
(56)	(57)	(58)	(59)	(60)	(61)	(62)	(63)	(64)	(65)	(66)	(67)	(68)	(69)														

**Appendix 5 – Example of forest block – Block 43, Kilsture, Galloway**



## **Appendix 6 - Confidence intervals for volume of visitors**

This survey builds on a methodology developed for the Forestry Commission by Cheltenham and Gloucester College of Higher Education which suggested the most efficient way of balancing the cost of data collection at a large number of forest entrances spread over a wide geographical area with data precision and accuracy. Forest blocks were stratified by level of usage and population density within 15km of the site, but there is still a large degree of variability within a given forest block, from highly developed facilities with car parking and visitor centres to remote access points. Using this methodology, factors affecting the precision of the estimates are: the sampling of a proportion of entrances to be used in the survey, the high variability of visitor numbers to entrances within a forest block and the relatively small number of hours sampling.

The precision of the estimates of the volume of visitors to FCS woodland given in Section B of the report can be calculated using information about the number of entrances sampled in the survey. The sampling error can be calculated and used to apply confidence intervals to the estimates.

### **Confidence intervals for estimates of total visits to surveyed FCS Woodland 2004/5**

	<b>Estimate of visits <math>\pm</math> 95% CI</b>
Buchan	694,000 $\pm$ 391,000
Galloway	812,000 $\pm$ 616,000
Lochaber	559,000 $\pm$ 239,000
Scottish Borders	1,676,000 $\pm$ 344,000
West Argyll	232,000 $\pm$ 136,000
<b>Total – surveyed districts</b>	<b>3,973,000 <math>\pm</math> 852,000</b>

The table shows the range of uncertainty related to sampling a proportion of entrances to the woodlands in each of the five forest districts. The total estimated volume for the five forest districts will be in the range **3.1 to 4.8 million visits** each year, at the 95% confidence interval. The large confidence intervals are indicative of the fact that the entrances do not contribute equally to the total number of people visiting FCS woodland - entrances range from highly developed facilities, with car parking and visitor centres, to remote rural access points.

Another source of sampling error arises from the fact that survey work was done at each entrance for a small number of time periods throughout the year.

Although the range of uncertainty is high, the estimates published in this report are the best currently available for FCS woodland. The survey will run in another five forest districts in 2005/6 and the final five forest districts in 2006/7. The data from the three surveys can then be combined to provide more accurate estimates of visitors to FCS woodland.

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