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# Research Report

Quality of the  
Visitor Experience:  
Alice Holt 2013



Prepared for:  
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# 1. Executive summary

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## 1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed; 14 per year (7 in each country). All selected sites in England are high usage, while sites in Wales consist of a combination of medium and high usage sites. In 2013, interviews were conducted at 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

This report summarises the findings from the 241 visitor interviews conducted at Alice Holt in 2013. Throughout the report, comparisons have been made to the previous research conducted 2010-2011, and the all England average (aggregated data from all 7 sites surveyed in 2013).

## 1.2 Alice Holt Forest

Alice Holt Forest is an ancient Royal Forest in Hampshire, south west of Farnham in Surrey near the village of Rowledge. It is noted for its oak trees which once supplied timber for navy ships. Recently Alice Holt oak has been used to build a replica of Shakespeare's Globe theatre in London.

Part of the forest is designated as a research area, used for studies into subjects such as forest carbon dynamics, environmental change and wood fuels.

The forest's central area serves as a visitor attraction, with facilities like car parks, a cafe, playgrounds, cycle hire and waymarked trails for walking and cycling. Cycling provision includes inclusive equipment to accommodate cycling by disabled people.

### 1.3 Perceptions of the site

Perceptions of Alice Holt as a place to visit are extremely positive; this was also the case across all the England sites, and was seen in previous research. In fact, currently nobody interviewed at Alice Holt in 2013 gave a negative rating of the site.

Nearly three in five (56%) rated the site as 'excellent', which was higher than both the all England average (52%) and the 2010-2011 findings (49%). A further two fifths (41%) gave a rating of 'very good' and 3% rate it as 'good'.

Similarly, ratings of how safe and welcoming the site is were also very positive; over half of visitors to Alice Holt gave this measure an 'excellent' rating (54%), with another 44% having rated it as 'very good'.

When asked whether they would be likely to recommend Alice Holt as a place to visit to a friend or relative (using a score of 0 to 10), scores for Alice Holt, and all England sites in general, were overwhelmingly positive. The average score for Alice Holt was 9.4 out of 10 (same as all England), while in 2010-2011 it was 9.2 out of 10.

### 1.4 Strengths of the site

The aspects of the site liked by the highest proportion of visitors were the activities available for children (63%). Reflecting the prevalence of families visiting Alice Holt, this proportion was significantly higher than the all England average (22%), and also higher than the figure recorded at Alice Holt in 2010-2011 (48%).

Nearly half of visitors mentioned that they like the walks, paths and trails (45%), while around three in ten mention the fresh air and being outside (29%), and the scenery / beautiful views (27%).

A fifth of visitors to Alice Holt liked the peacefulness and tranquillity of the site (22%). A similar proportion mentioned the fact that the site is convenient and close to home (21%), with 21% also saying it is a safe environment.

## 1.5 Areas for improvement

While around a quarter (23%) of visitors claimed that there are things that could be done at Alice Holt that would enhance their enjoyment of the site, there were no prevailing aspects that need attention.

There were however calls for:

- More activities and play areas for children (6%)
- An improvement to the café (6%)
- Better parking (3%)
- More seating (2%)
- Improved signage and maps (2%)
- More picnic areas (2%).

However, only very small numbers mentioned each of these, and overall, visitors were happy with the site and made only positive comments (71%).

## 1.6 Visitor profile

The vast majority of visitors to Alice Holt had visited the site before (78%). This proportion was consistent with the all England average of 76% who said they had been to the respective forest site before, but has declined slightly from 83% of repeat visitors at Alice Holt recorded in 2010-2011.

Almost nine in ten visitors lived fairly locally, having travelled fewer than three hours for a day-trip to the site (89%).

Visitors to Alice Holt were most likely to be aged between 35-44 years (52%), and least likely to be aged 55+ years (15%). This age profile is different from the all England sample, where 33% of visitors were aged 35-44 years, while 24% were aged 55+.

Most of the visitors to the site were accompanied by children (88%) and had children living at home (76%). It is therefore not surprising that the gender profile of visitors to Alice Holt was predominantly female (66%), and while this bias was also seen more generally across all sites, it was less pronounced (54% female vs. 46% male for all England sites).

The socio-economic profile of visitors to Alice Holt was skewed towards ABC1s (professionals and middle managers) who accounted for 76% of the sample. However, this was also the case across all the England sites (76%).

## 2. Introduction

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### 2.1 Background

The woodland estate managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) covers some 105,000 hectares and 256,000 hectares respectively.

Each year in Wales, around 4 million visits are made to the estate including 0.5 million to sites with visitor centres. In England, around 40 million visits are made to the estate each year, including 3 million to sites with visitor centres.

The use and enjoyment of woodlands can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming woodlands provide an excellent setting for outdoor recreation such as walking, cycling and horse riding. Regular outdoor exercise lowers rates of obesity, cardiovascular disease, osteoporosis and type-2 diabetes as well as some cancers. It can contribute to a lifelong pattern of healthy living if encouraged amongst the young, and in the elderly it contributes to greater mobility and fewer injuries associated with ageing.

The experience of a natural environment and the opportunity for exercise can assist in treating people with mental health problems, in modifying anti-social behaviour in young children and adolescents, in supporting people dealing with stress and depression, and can also help to improve concentration in the workplace.

The provision of a quality visitor experience will help to encourage both repeat and new visitors. The quality of visitor experience depends not only on the facilities provided at a site (notice boards, playgrounds, toilets, car park, walking trails), but also on the 'sense of welcome' that the woodland provides. This 'sense of welcome' in turn depends both on the maintenance of the woodland (rubbish, dog dirt, brambles, mud) and also the nature of the woodland itself (light & open or dense & dark).

Maintaining or improving the quality of experience at NRW and FCE managed sites is part of a wide-ranging programme of work to encourage the development and promotion of woodland access throughout Wales and England with suitable infrastructure and well managed woodlands that feel safe and welcoming.



NRW and FCE have commissioned a variety of visitor surveys in recent years in relation to the usage of their forests and woodlands. The Quality of the Visitor Experience Survey has been conducted since 2006, but has been run in its current format since 2010. The main aims of the survey are:

- To provide information on the quality of visitor experience at each site
- Use a set of standard questions so that the quality of visitor experience at each site can be scored, benchmarked and tracked over time
- For sites in Wales, also use a set of tailored questions at each site to give information on how the visitor experience at that particular site could be improved.

## 2.2 Research programme

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed; 14 per year (7 in each country). All selected sites in England are categorised as being high usage, while sites in Wales consist of a combination of medium and high usage sites.

Table 1 below details the sites surveyed in 2013, along with the number of interviews completed at each.

**Table 1: Interviewing sites and number of interviews conducted**

England		Wales	
Site	No. of interviews	Site	No. of interviews
Alice Holt	241	Afan Forest Park (H)	192
Cannock Chase	223	Brechfa (M)	138
Cardinham Woods	237	Gwydyr (M)	147
Grizedale	211	Hafren (M)	130
Sherwood Pines	207	Moel Famau (M)	190
Wendover Woods	216	Newborough (H)	182
Westonbirt	210	Whitestone (M)	135
<b>TOTAL</b>	<b>1,545</b>	<b>TOTAL</b>	<b>1,114</b>

\* H = High usage; M = Medium usage

Interviews are conducted face-to-face with visitors who are exiting the site or coming to the end of their visit, with interviewing points situated at key access points.

The core interviewing period will run from March to October each year. However, during 2013, interviewing was concentrated in August, September and October, with a small number of interviews conducted in July and November.

At Alice Holt, interviewing took place between 1<sup>st</sup> August and 30<sup>th</sup> October 2013, and a total of 241 interviews were conducted.

## **2.3 Report**

This report summarises the results of the interviews undertaken at Alice Holt in 2013, and includes individual sites scores on key visitor measures. Throughout the report, comparisons have been made to the 'All England' figures (aggregated results from all 7 sites) and previous findings from the 2010 – 2011 research (where applicable).

Results are presented as rounded percentages (no decimals), which may mean that some percentages do not add up exactly to 100%.

## **2.4 Data tables**

Comprehensive data tables are available separately, and contain the following cross-breaks:

- Home region
- Home nation
- Age
- Ethnicity
- Gender
- Social class
- Group composition
- Ages of children
- Day trip vs. staying visitor
- First time vs. repeat visitor
- Limiting illness
- Quality of experience.

### 3. Visitor profile information

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#### 3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who are visiting Alice Holt. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in England in 2013.

The gender profile of visitors to the site was predominantly female (66% of visitors were women compared with 34% men), and while this pattern was also seen more generally across all sites, the bias was less pronounced (54% female vs. 46% male). This gender bias was probably linked to the fact that a high proportion of visitors to the site were accompanied by children (see Figure 2). Moreover, 76% of the sample had children living at home (compared to 44% across all England sites).

Visitors to Alice Holt were most likely to be aged between 35-44 years (52%), and least likely to be aged 55+ years (15%). This age profile was different from the all England sample, where 33% of visitors were aged 35-44 years, while 24% are aged 55+.

Three quarters of visitors to Alice Holt were employed (74%), with 44% employed full-time and 30% part-time. The higher than average incidence of part-time workers compared to the England average (16%) reflects the fact that most of the visitors were female with children.

The socio-economic profile of visitors to Alice Holt was skewed towards ABC1 (professionals and middle managers) who accounted for 76% of the sample. However, this was also the case across all the England sites (76%). Only around a quarter of visitors to Alice Holt (23%) belonged to the C2DE social groups (skilled and semi-skilled manual workers and those receiving benefits).

Only a very small proportion of visitors to Alice Holt had a limiting illness (3%); this was consistent with the all England average of 5%.

The overwhelming majority of visitors to Alice Holt were white British (95%), with a small number of visitors (4%) describing their ethnicity as 'white other' (primarily European) or 'black, Asian, mixed race' (1%). These proportions were consistent with the all England average – see Table 2 overleaf for more details.

**Table 2: Profile of visitors by key demographics 2013**

		Alice Holt %	All England %
<b>Gender</b>	Male	34	46
	Female	66	54
<b>Age</b>	16 - 24	2	6
	25 - 34	20	19
	35 – 44	52	33
	45 – 54	11	19
	55 – 64	9	12
	65+	6	12
<b>Social class</b>	AB	33	40
	C1	43	36
	C2	14	17
	DE	9	7
	Refused	<1	1
<b>Working status</b>	Full-time employee (30+ hours per week)	44	55
	Part-time employee (<30 hours per week)	30	16
	Self-employed	2	4
	Full-time education	1	3
	Unemployed	-	<1
	Permanently sick / disabled	1	1
	Retired	6	14
	Looking after home	16	7
<b>Limiting illness</b>	Yes – limited a lot	1	2
	Yes – limited a little	2	3
	No	97	94
<b>Children in household</b>	Yes	76	44
	No	23	56
	Refused	<1	1
<b>Ethnicity</b>	White – British / Welsh / Irish	95	97
	White – Other	4	1
	Black / Asian / Mixed	1	2
	Refused	-	<1

Base: All visitors – Alice Holt (241); All England (1,545)

### 3.2 Group profile

#### 3.2.1 Size of group

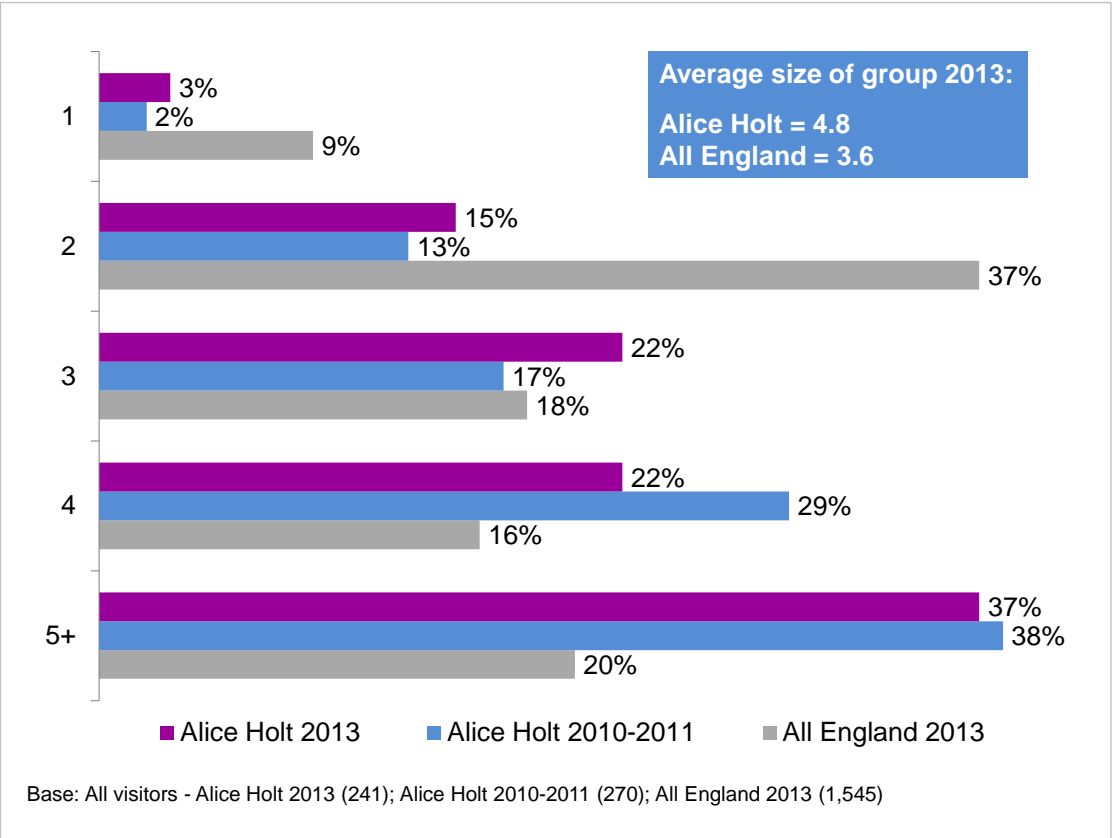
Reflecting the prevalence of families, group sizes tended to be larger at Alice Holt (average 4.8 people) compared to the all England sample (average 3.6 people).

Around two in five visitor groups coming to Alice Holt consisted of 5 or more people (37%). This is consistent with the previous research (38%), but significantly higher than the all England average (20%).

Only a very small proportion of visitors to Alice Holt were alone (3% cf. 9% all England). A further 15% were accompanied by one other person; across all England sites, nearly two in five groups (37%) consisted of two people.

Just over two fifths of visitor groups to Alice Holt (44%) consisted of three or four people (compared to 34% all England) – see Figure 1 below.

Figure 1: Q1. Total size of the group



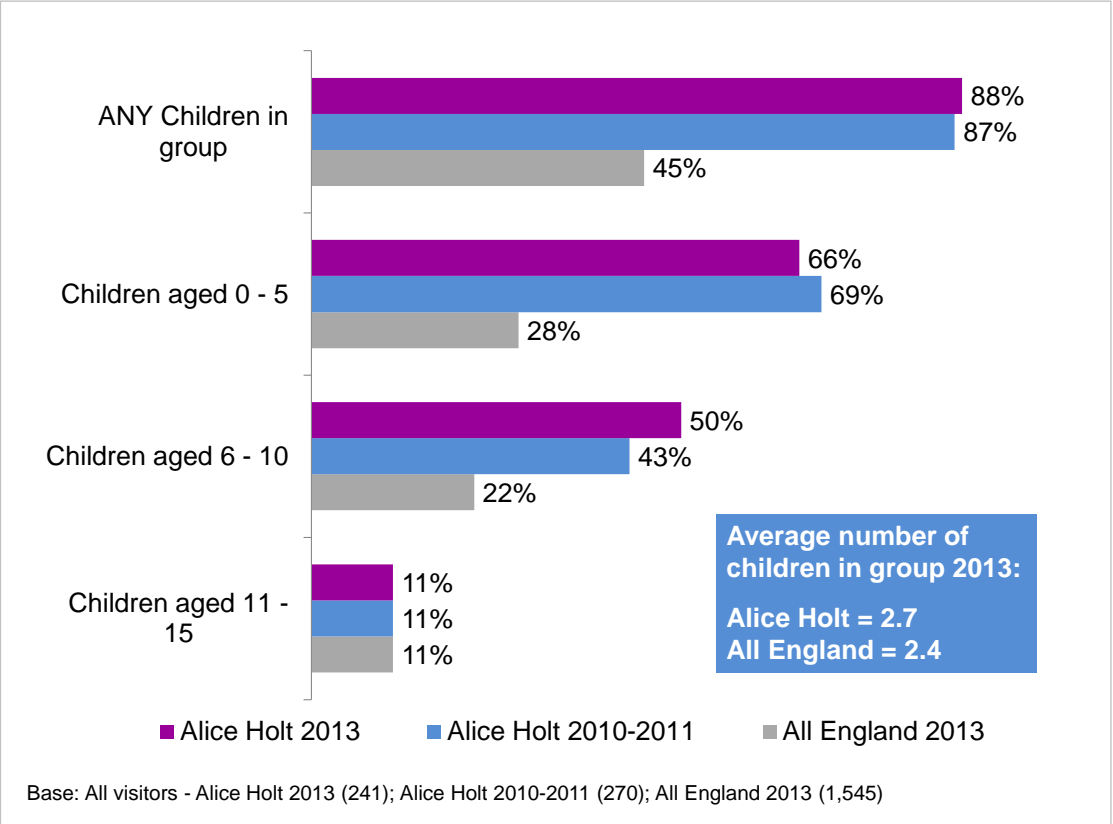
### 3.2.2 Composition of group

The vast majority of visitors to Alice Holt were accompanied by children (88%), which is significantly higher than the all England average of 45%. However, where groups *did* contain children, the average number of children per group was consistent with the all England average (mean of 2.7 children per group at Alice Holt compared to 2.4 overall).

Children visiting the site tended to be aged 0-5 years (66%), while half were aged 6-10 years (50%). Only 11% of children visiting Alice Holt, and indeed all England sites, were aged 11-15 years.

The age profile of children visiting Alice Holt in 2013 was consistent with the findings from the previous research conducted in 2010 – see Figure 2 below.

**Figure 2: Q1. Composition of group**



## 4. Profile of visit

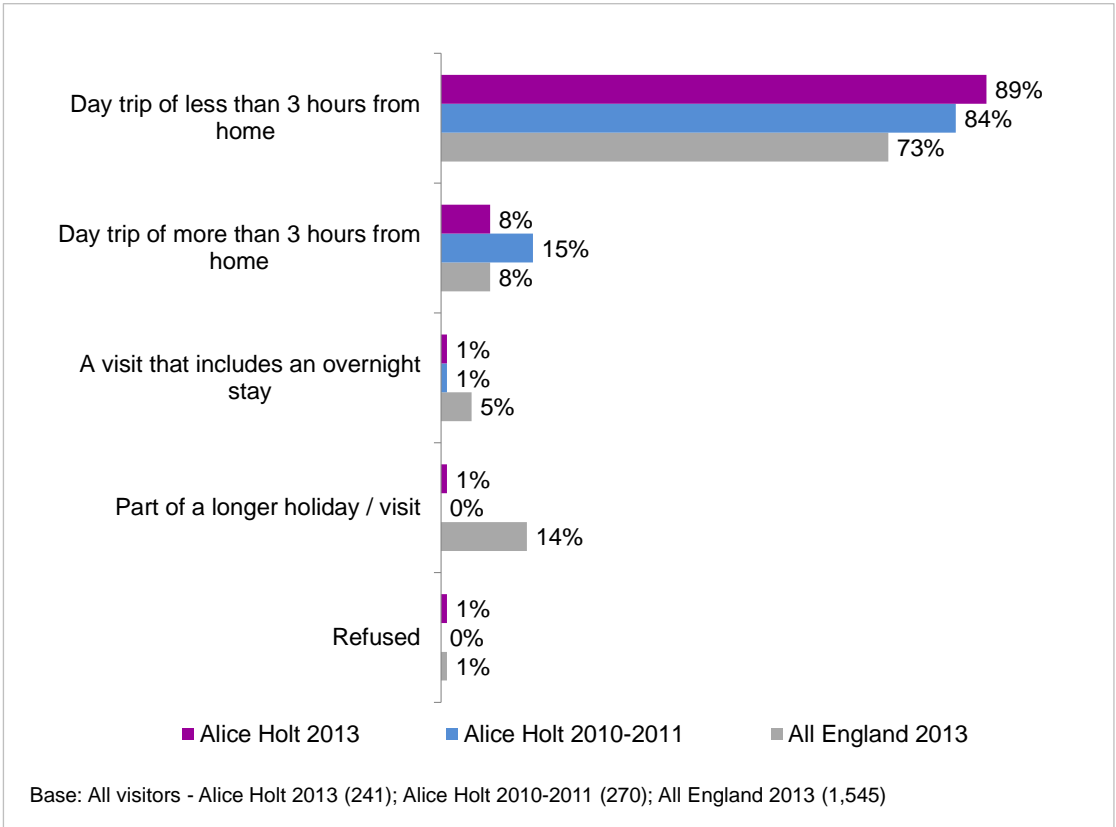
### 4.1 Type of visit

Most of the visitors to Alice Holt travelled for less than three hours to visit the site and intended to stay for the day, rather than overnight (89%). This proportion is slightly higher than that seen in the previous research (where 84% were day trippers travelling less than 3 hours), and significantly higher than the all England average (73%).

Compared to the findings of 2010-2011, in 2013 a smaller proportion of visitors travelled for more than three hours as a day trip to the site (8% cf. 15%).

Only a very small number were staying in the vicinity of Alice Holt overnight or as part of a longer holiday (2% in 2013; 1% in 2011-2010). Looking at the all England findings for 2013, it can be seen that nearly one in five visitors were staying in the area overnight or as part of a longer holiday (19%) – see Figure 3 below.

**Figure 3: Q2. Type of visit**



## 4.2 Visitor origin

Visitors were asked to provide their postcode in order to determine their home region.

Reflecting the finding that most visitors to Alice Holt travelled less than three hours to visit the site, the vast majority were living in the South East of England (91%) – Table 3 below and Figure 4 overleaf provide more details.

**Table 3: Visitor origin 2013**

		Alice Holt	All England
		%	%
<b>Home region</b>	North	<1	8
	Yorkshire & Humberside	1	4
	East Midlands	-	13
	West Midlands	-	12
	East of England (inc. London)	5	6
	South East	91	29
	South West	1	24
	Outside of England	1	3
<b>Home nation</b>	England	99	97
	Wales	<1	1
	Rest of UK	<1	<1
	Abroad	-	2

Base: All visitors – Alice Holt (241); All England (1,545)



Figure 4: Map of Visitor Origin for Alice Holt



### 4.3 Frequency of visits

#### 4.3.1 First-time visitors

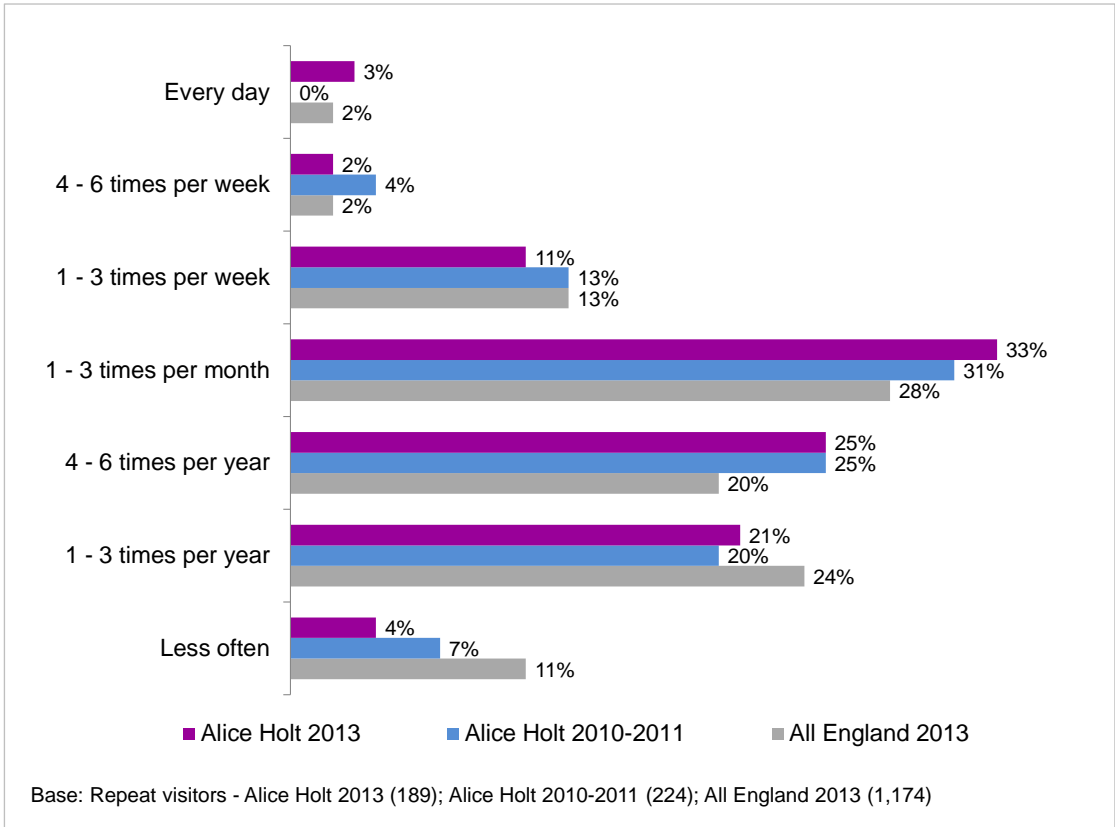
In 2013, only 22% of visitors to Alice Holt were first-time visitors. This proportion was consistent with the all England average of 24% who said they have never visited the respective forest site before, but has increased slightly from 17% of first-time visitors observed at Alice Holt in 2010-2011.

#### 4.3.2 Repeat visitors

Focussing on repeat visitors (78% of the sample), it can be seen that larger proportions going to Alice Holt tended to be more regular visitors compared to the overall England average. A third (33%) said they visited Alice Holt between 1 and 3 times a month (28% all England), and a quarter visited between 4 and 6 times each year (20% all England).

Infrequent visitors (those coming to Alice Holt 1-3 times a year or less often) accounted for only 25% of regular visitors, compared to 35% of all England sites. The frequency of visits for repeat visitors to Alice Holt was consistent with the previous research conducted in 2010-2011 - see Figure 5 below.

**Figure 5: Q3. Frequency of visits (where visited the site before)**



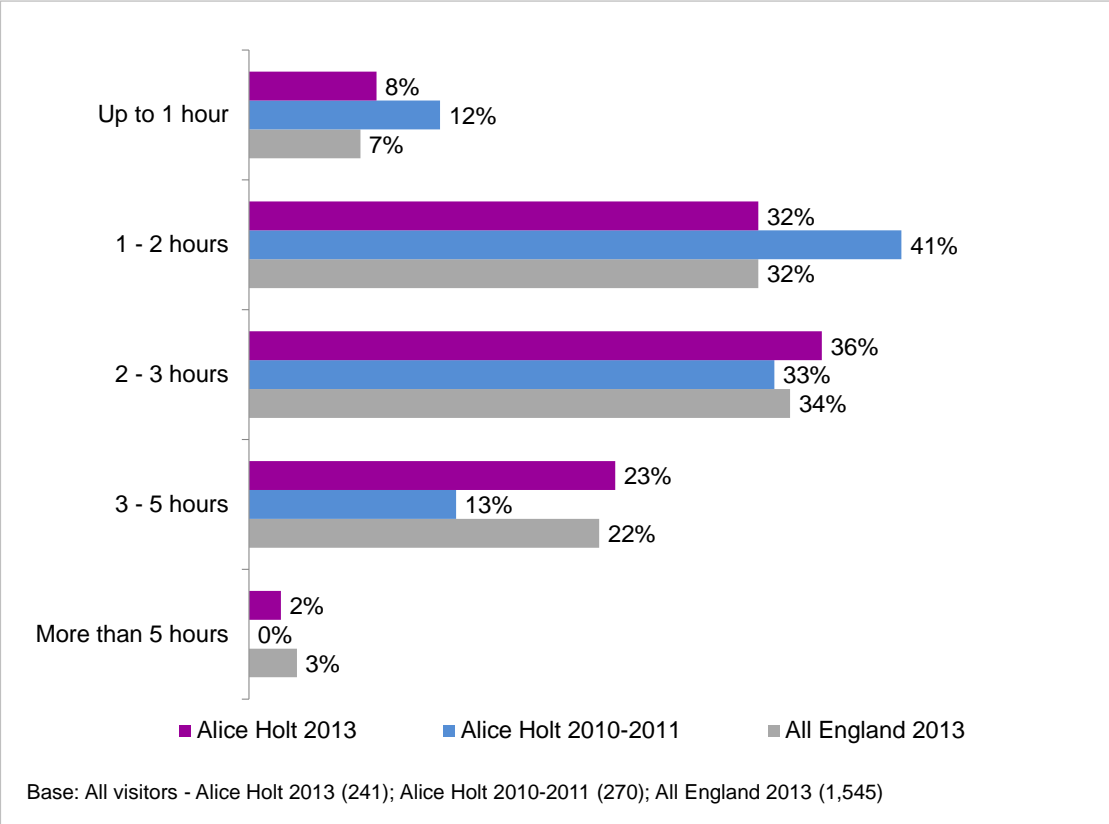
#### 4.4 Length of visit

Compared to previous years, visitors to Alice Holt in 2013 were staying longer at the site. In 2010-2011, the average length of visit was 2 hours and 6 minutes, while in 2013 it was 2 hours and 27 minutes. The average length of visit across all sites in England in 2013 was 2 hours and 29 minutes.

The increase in the average time spent at the site can be seen in Figure 6 below. Only 8% of visitors intended to stay less than an hour at Alice Holt (compared to 12% in 2010-2011).

In the previous research, almost two fifths of visitors said they would be staying at the site between 1-2 hours (reducing to 32% in 2013), while only 13% said they would be staying between 3-5 hours (increasing to 23% in 2013) - see Figure 6 below.

**Figure 6: Q6. Approximate length of time spent at the site during visit**



## 4.5 Activities undertaken

Visitors were presented with a list of activities and asked which ones they themselves, or others in their group, had either taken part in already, or intended to take part in during their visit. They were able to choose as many activities as applicable, and could choose activities of a similar nature (e.g. walking on trails and walking off trails).

Table 4 shows the combined figures for the following:

- Activities that visitors had already taken part in
- Activities that other members of the group had already taken part in
- Activities that visitors and other members of their group intended to take part in before they left the site.

The most popular activity undertaken at Alice Holt was use of the play area (82%). This was higher than the figure seen in the previous research (63%) and considerably higher than the overall England average in 2013 (28%).

Four fifths of visitors to Alice Holt walked throughout the site during their visit (80%), with walking along the sign-posted trails proving to be the most popular walking activity (59%). The proportion who took part in walking activities had also increased since 2010-2011 (59%), and was again higher than the all England average for 2013 (64%).

Slightly fewer visitors were taking part in cycling activities compared to 2010-2011 (20% vs. 25%), but usage of the café / restaurant (50%), picnic areas (28%) and Go Ape! (14%) had all increased – see Table 4 overleaf.

**Table 4: Q4a/Q4b/Q5 - Activities taken / intend to take by all members of visitor group**

	Alice Holt 2013 %	Alice Holt 2010-2011 %	All England 2013 %
Cycling on forest roads, tracks or trails	20	16	16
Cycling / mountain biking off trails or tracks	2	12	19
<b>TOTAL CYCLING</b>	<b>20</b>	<b>25</b>	<b>29</b>
Walking on a sign-posted trail	59	41	37
Dog walking	20	20	23
Walking but not following sign-posts	15	19	20
<b>TOTAL WALKING</b>	<b>80</b>	<b>59</b>	<b>64</b>
Using the play area	82	63	28
Using the café / restaurant / other catering	50	39	57
Picnic *	28	16	11
Go Ape!	14	-	9
Admiring the views	7	8	12
Photography	4	4	6
Seeing something in the forest	3	-	3
Using the Visitor Centre / Shop	2	5	8
Nature / natural history visit	2	2	1
Organised trip / event	1	1	3
A forest drive	1	-	<1
Site specific event	1	-	1

Base: All visitors – Alice Holt 2013 (241); Alice Holt 2010-2011 (270); All England 2013 (1,545)

\* 2010-2011 figure includes usage of Picnics and barbeques

NB – Aggregated scores for cycling and walking indicate that a proportion of visitors took part / intended to take part in more than one type of cycling/walking.

As might be expected, the vast majority of visitors with children used the play area (92%).

Cycling activities proved most popular amongst 35-44 year olds (29%), whereas walking activities were most popular amongst those aged 65+ (93%).

Younger visitors aged 16-34 and 35-54 (50% and 53% respectively) were more likely to use the café/restaurant compared to those aged 55+ (34%).

## 4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Cycling and walking activities have been analysed in Table 5 below.

Overall, visits to Alice Holt lasted approximately 2½ hours; the average time spent on walking activities was 1 hour and 3 minutes (13 minutes less than the 2010-2011 average) while the average time spent on cycling activities was 1 hour 25 minutes (6 minutes more than the 2010-2011 average).

Therefore, while walking was a more popular activity than cycling, those choosing to cycle were taking part in this activity for longer than those who walked around the site – see Table 5 below.

**Table 5: Q7 – Time spent taking part in cycling and walking at Alice Holt (Actual respondents only)**

	Total duration of visit		Time spent on any walking		Time spent on any cycling	
	2013	2010-2011	2013	2010-2011	2013	2010-2011
Up to 30 minutes	-	-	19	11	15	25
31 – 60 minutes	8	12	39	32	21	23
1 – 2 hours	32	41	39	44	45	23
2 – 3 hours	36	33	5	10	24	17
3 – 5 hours	23	13	1	1	-	7
5+ hours	2	1	-	-	-	-
<b>AVERAGE</b>	<b>2 hrs 27 mins</b>	<b>2 hrs 6 mins</b>	<b>1 hr 3 mins</b>	<b>1 hr 16 mins</b>	<b>1 hr 25 mins</b>	<b>1 hr 19 mins</b>

Base: all visitors (241); respondents who walked (187); respondents who cycled (33)

## 4.7 Money spent in the area as a result of the visit

Visitors to Alice Holt were asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Table 6 show the figures calculated by combining the data across all types of spending, and across both lone visitors and visitor groups. Please note that mean scores include 'zero' responses.

On the whole, most of the visitors to Alice Holt claimed that they would be likely to spend up to £5 in the area as a result of their trip (89%), with another 8% saying they would spend between £6 and £10. Only a small proportion (3%) said they were likely to spend any more than £10.

The average spend in the area as a result of visiting Alice Holt was £4.07 – this is approximately £2 less than the all England average (£6.13) and the figure seen in the previous research (£6.03) – see Table 6 below.

**Table 6: Q18a/Q18b – Average spend per person/group – frequency of spending within each price range**

	Alice Holt 2013 %	Alice Holt 2010-2011 %	All England 2013 %
£0 - £5	89	82	75
£6 - £10	8	10	15
£11 - £20	1	4	6
£21 - £50	2	2	3
£51+	-	1	<1
<b>AVERAGE</b>	<b>£4.07</b>	<b>£6.03</b>	<b>£6.13</b>

Base: All visitors – Alice Holt 2013 (241); Alice Holt 2010-2011 (270); All England 2013 (1,545)



When looking at individual types of spending, it can be seen that most people paid for parking in the area when visiting Alice Holt (85%) and the average amount spent was £3.55 – this was slightly higher than the figure recorded in the previous survey (£2.91) and also the overall England average for 2013 (£2.73).

Just over two thirds of visitors were likely to spend money on transport (69%), with the average amount spent being £4.46, while half (52%) intended to purchase food (outside of any accommodation), with an average of £5.43 having been spent; this amount was lower than that seen in 2010-2011 (£8.50) and even lower than the current overall England average (£9.93).

One in ten (12%) said that they would be spending money on attractions as a result of their visit to Alice Holt, with the average spent on admissions being £6.11 (consistent with the all England average of £6.27).

Only very small numbers of visitors said that they would be likely to spend on accommodation, non-routine shopping, hiring equipment or other items as a result of their visit to Alice Holt – see Table 7 overleaf.

**Table 7: Q18a/Q18b – Average spend across individual items (includes zero spend)**

	Proportion of visitors to <u>Alice Holt</u> spending anything on this item %	Average £ Alice Holt 2013	Average £ Alice Holt 2010-2011	Average £ All England 2013
Parking	85	3.55	2.91	2.73
Transport including petrol, taxis, public transport	69	4.46	4.25	4.66
Food and drink purchased outside any accommodation	53	5.43	8.50	9.93
Admissions fees to attractions	12	6.11	-	6.27
Accommodation, including food and drink purchased there	5	3.26	-	13.74
Non-routine shopping	2	0.18	-	0.65
Hiring equipment e.g. boats, bikes or horses	2	1.70	-	1.72
Other miscellaneous items	1	0.52	-	0.83

Base: All visitors – Alice Holt 2013 (241); Alice Holt 2010-2011 (270); All England 2013 (1,545)

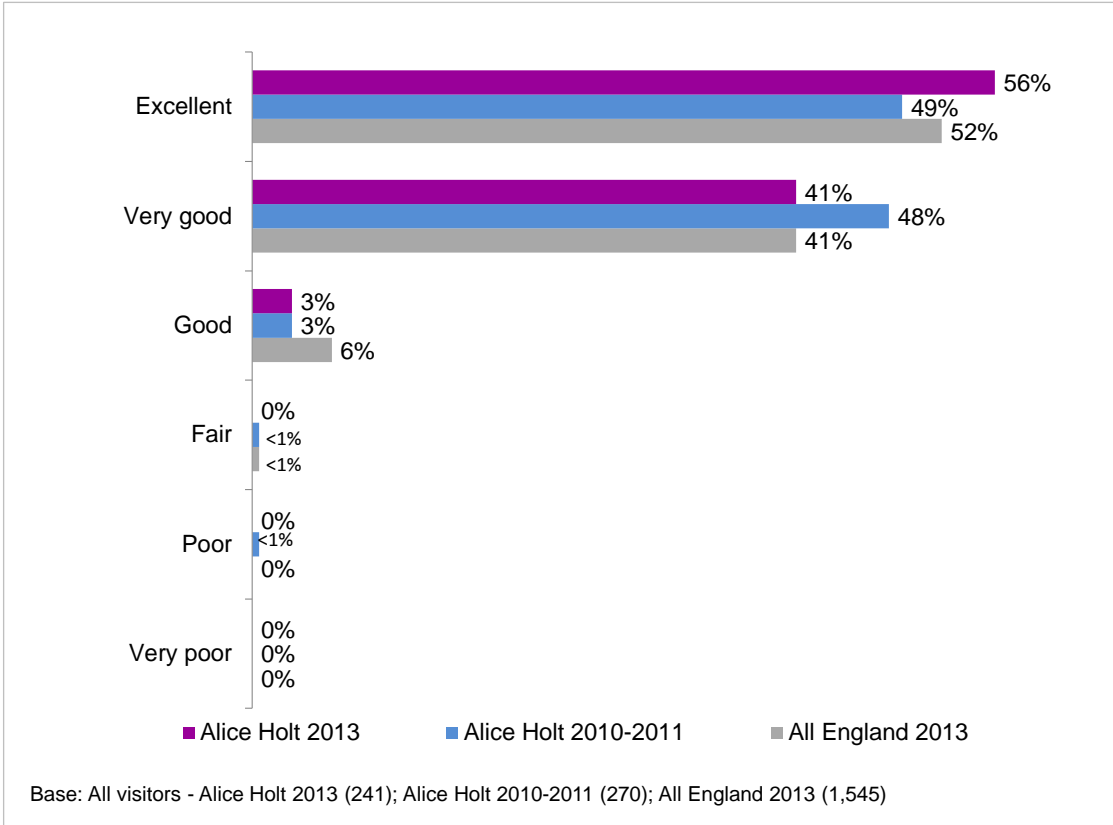
## 5. Perceptions of the site

### 5.1 Overall rating of the site as a place to visit

Perceptions of Alice Holt as a place to visit were extremely positive; this was also the case across all the England sites, and was found in the previous research conducted in 2010. In fact, nobody interviewed at Alice Holt in 2013 gave a negative rating of the site.

Nearly three in five (56%) rated the site as 'excellent', which is higher than both the all England average (52%) and the 2010-2011 findings (49%). A further two fifths (41%) gave the site a rating of 'very good' and 3% rated it as 'good' – see Figure 7 below.

Figure 7: Q16. Rating of the site as a place to visit



Those aged 35-54 years were slightly more positive about the site compared to those aged 16-34, with 61% and 44% respectively giving an 'excellent' rating. Those visitors with children were also more likely to give an 'excellent' rating (57%) compared to those without children (50%).

## 5.2 Overall rating of the site as safe and welcoming

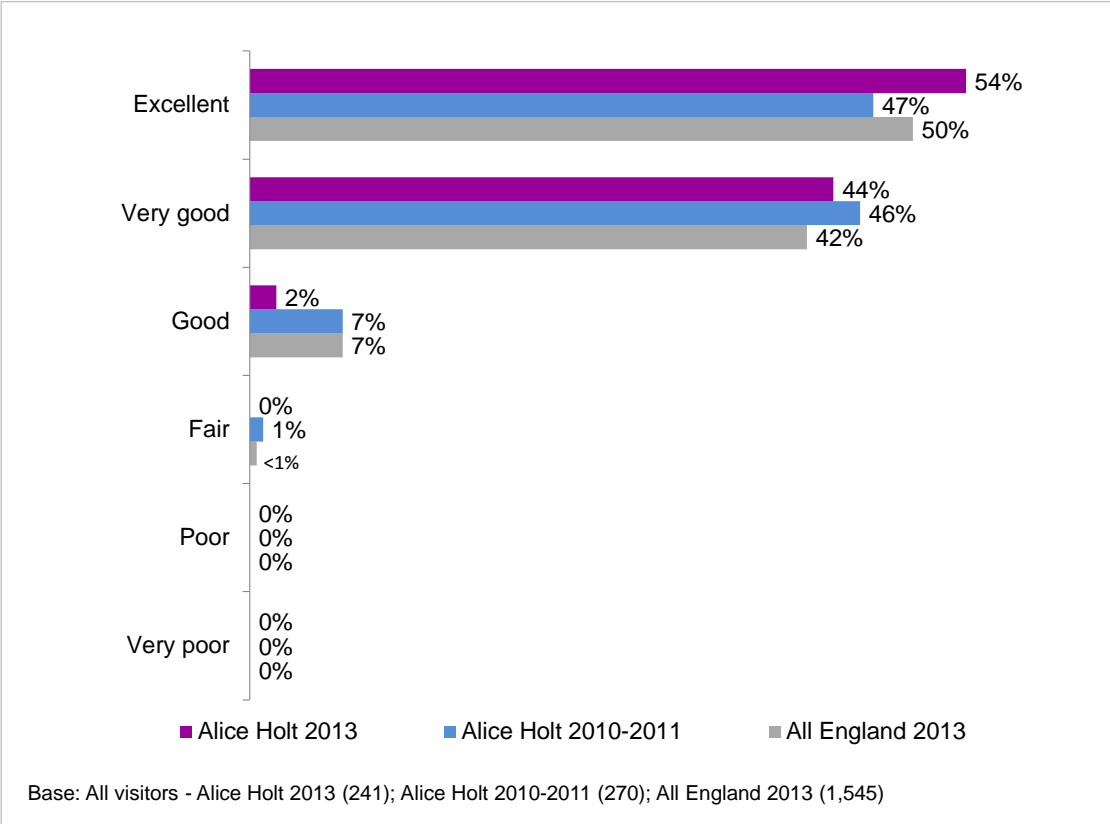
Similarly, ratings of how safe and welcoming the site is were also very positive; this was also the case across all England sites, and was seen in the 2010-2011 research.

Over half of visitors to Alice Holt gave this measure an ‘excellent’ rating (54%), compared to 47% in 2010-2011, and 50% across all England.

Another 44% gave a ‘very good’ rating for how safe and welcoming Alice Holt felt (compared to 46% in 2010-2011 and 42% across all England sites).

Only a very small proportion gave a ‘good’ rating (2%); none of the visitors interviewed in Alice Holt gave a rating lower than this – see Figure 8 below.

**Figure 8: Q12. Rating of the site in terms of how safe and welcoming it feels**



Visitors with children were more likely to give an ‘excellent’ rating on the safety of the site (55%) compared to those without children (40%). In addition, older visitors aged 55+ were more likely to give an ‘excellent’ rating (60%) compared to younger visitors aged 16-34 (43%).

Those visitors who were able to rate the site in terms of how safe and welcoming it felt were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the site. Table 8 below details the comments provided by 2% or more of the sample at Alice Holt.

Table 8 below shows the responses received from those visitors giving a positive rating (excellent, very good, good) for both Alice Holt and all England sites. In the case of Alice Holt, this was **all** visitors.

The main reason given was that the site is safe place for kids to run around a play (36%), which was higher than the all England average (15%), and probably reflects the prevalence of families at the site.

A quarter of visitors (26%) said that the site is a safe environment generally (for all people), while a fifth (20%) said that the site is clean, tidy and well maintained.

Around one in ten mention that the site was well laid out (12%), had good quality facilities and was well-signposted (9% for each) – see Table 8 overleaf for more details on the comments provided.

**Table 8: Q13 – Reasons for giving a positive rating on how safe and welcoming the site feels – main mentions**

	Alice Holt 2013 %	All England 2013 %
Good place for the kids to play / run around / safe for the kids	36	15
Safe environment generally for all people	26	17
Clean / tidy / well-maintained / litter-free	20	15
Well laid out / well organised / set-up	12	12
Good quality facilities / amenities	9	8
Well signposted / good maps / info boards	9	13
Away from roads / no cars / cars drive slowly	7	5
Fresh air / open space	6	6
The scenery / views / beautiful environment	6	7
General positive comments	6	12
Plenty to do / has everything you want	5	5
Good provision of paths / trails and tracks	5	7
Good car parking	5	6
Peaceful / pleasant / tranquil / relaxing	4	9
Friendly / helpful staff / rangers	4	7
People are friendly / no jobs	3	8
Never had any problems	3	4
Dog-friendly	2	2
Live locally / convenient / easy to get to	2	3
Good toilets / plenty of toilets	2	2
Plenty of staff / rangers	2	2

Base: Visitors rating the site as excellent, very good or good – Alice Holt 2013 (241); All England 2013 (1,528)

### 5.3 Recommending the site as a place to visit

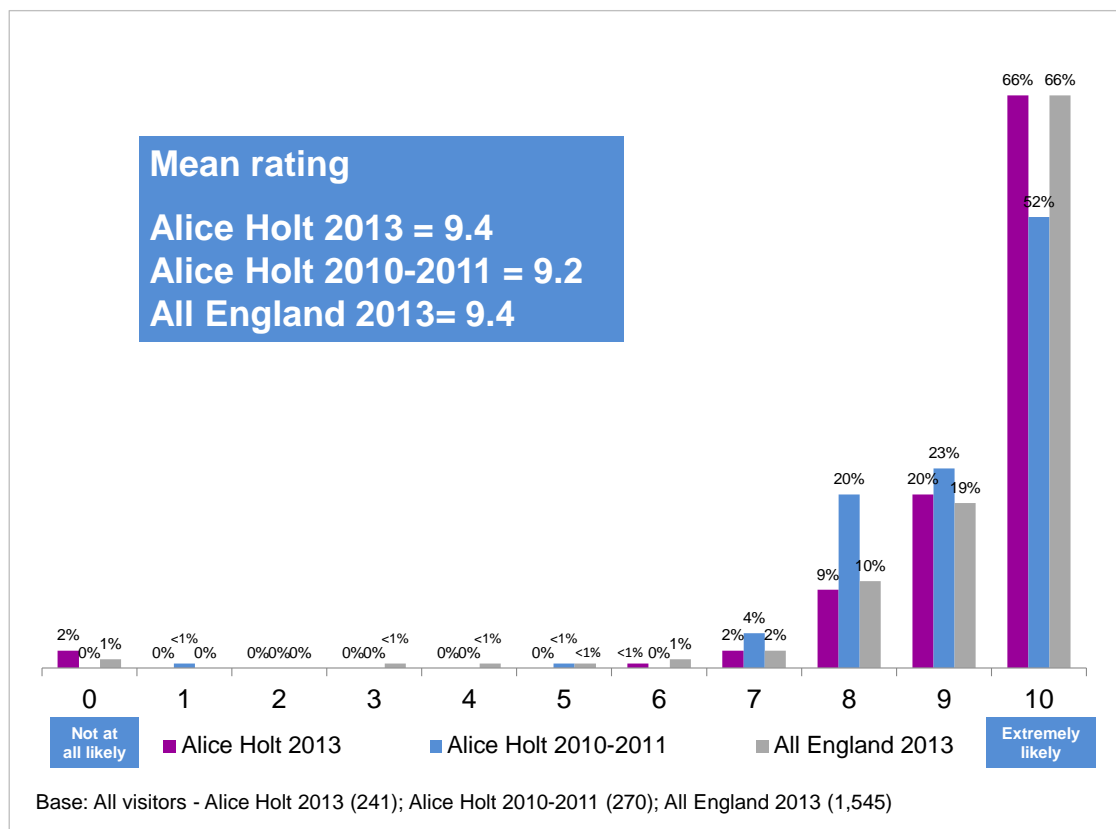
Visitors were asked whether they would be likely to recommend Alice Holt as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'Not at all likely' and 10 equalled 'Extremely likely'.

Scores for Alice Holt, and all England sites in general, were overwhelmingly positive; only 2% of visitors gave a rating below 7/10 (representing one individual).

Two thirds (66%) gave a rating of 10, which was equal to the all England average (66%) and 14% higher than the proportion who gave a rating of 10 back in 2010-2011 (52%).

The average score for Alice Holt in 2013 was 9.4/10 (same as all England), while in 2010-2011 it was 9.2/10 (increase of 0.2) – see Figure 9 below.

**Figure 9: Q17. Likelihood of recommending the site as a place to visit**



Given that the scores were so high overall, there was very little variation seen between various sub-groups of the sample.

Results can be analysed further by using a Net Promoter Score (NPS), which divides customers into three types:

- Promoters (loyal enthusiasts) - score of 9-10
- Passives (satisfied but unenthusiastic) – score of 7-8
- Detractors (somewhat less satisfied) – score of 0-6.

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Alice Holt was 83, which is 7 points higher than the score of 75 seen in 2010-2011, and is consistent with the all England score of 84.



## 5.4 Favourite things about the site

Visitors to Alice Holt were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 9 below (compared to the previous research and the all England average).

Once again, the prevalence of families came through strongly in the comments received; the aspect of the site liked by the highest proportion of visitors was the activities available for children (63%); this was higher than the proportion mentioning this at Alice Holt in 2010-2011 (48%), and significantly higher than the all England average (22%).

Nearly half of visitors mentioned the walks, paths and trails (45%); once more this is higher than the proportion who mentioned this aspect of the site in the previous research (38%), and also higher than across all the England sites (35%).

Around three in ten mentioned the fresh air and being outside (29%) and the scenery / beautiful views (27%). A fifth of visitors talked about the peacefulness and tranquillity of the site (22%), the fact that the site is convenient and close to home and the safe environment (21% for each) – see Table 9 overleaf for more details of the aspects of the site most liked by visitors.

**Table 9: Q9 – Favourite things about the site**

Activities	Alice Holt 2013 %	Alice Holt 2010-2011 %	All England 2013 %
Activities for the children	63	48	22
Walks / paths / trails	45	38	35
Fresh air / being outside	29	23	23
Scenery / views / beautiful	27	30	32
Peace / tranquillity / relaxation	22	16	33
Close to home / convenient	21	14	12
Safe environment	21	17	8
Cycle trails / opportunity to cycle	19	16	24
Clean / well looked-after	18	11	11
Like forests / trees / variety of trees	14	6	17
Opportunity to spend time with family / friends	12	16	7
Lots to see and / or do	12	11	8
Exercise / keeping fit	11	11	14
Good on-site facilities	10	15	11
Cost / value for money	10	6	3
Wildlife / bird-watching	7	8	4
Been here before / wanted to come again	7	7	6
Plenty / cheap / good parking	3	-	3
Open space / plenty of space	3	-	3
Helpful / pleasant staff	2	2	2
Ideal / safe for dogs / dog-friendly	2	-	3
Good accessibility	2	-	1

Base: All visitors – Alice Holt 2013 (241); Alice Holt 2010-2011 (270); All England 2013 (1,545)

There are some differences observed between different sub-groups of the sample:

- As might be expected, visitors with children were much more likely to mention the activities for children (69%) than those without (17%)
- Groups comprising of adults only were more likely to mention the walks and paths (57%) than those with children (43%)
- The scenery was mentioned by a higher proportion of people belonging to the ABC1 social groups (28%) than those belonging to the C2DE groups (21%)
- Men mentioned the peace and tranquillity of the site more frequently than women (26% men compared to 19% women).

**5.5 Suggested improvements to the site**

Visitors were asked if there was anything that would enhance their enjoyment of the site, and if anything interfered with their enjoyment of the site. Again, these questions were unprompted and visitors could mention more than one improvement or issue.

Turning firstly to what would enhance their enjoyment of the site; the vast majority of visitors to Alice Holt could not think of anything that would add to their enjoyment, and only made positive comments (71%); this was significantly higher than the all England average of 55%.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 10 below outlines the comments that were made by 2% of the sample or more.

Just less than one in ten wanted to see more activities for children, or improvements to the café (6% for each). Around one in twenty (3%) said they would like better parking, with 2% speaking of more seating, improved signage and more picnic areas – see Table 10 below.

**Table 10: Q10 – What would enhance enjoyment of site – main mentions**

	Alice Holt 2013 %	All England 2013 %
Nothing / general positive comments	71	55
More activities for children / more play areas	6	4
Improve café / catering in general	6	4
Better parking	3	6
More seating	2	1
Improve signage and maps	2	4
More picnic areas / BBQ / benches and tables	2	1

Base: All visitors – Alice Holt 2013 (241); All England 2013 (1,545)

Reflecting the high levels of satisfaction, when asked if there was anything that interfered with their enjoyment of the site, almost nine in ten reported that nothing had interfered with their enjoyment (86%); this was slightly higher than the overall England average (81%).

The comments made were mentioned by very small proportions, and Table 11 details those made by 1% of the sample or more.

Expensive car parking, problems with the car park (e.g. too few spaces, malfunctioning barriers and ticket machines), poor weather and dogs running loose were each mentioned by 2% of visitors, while poor service at the café, not enough sheltered areas, dog mess on the paths and the site being too busy were mentioned by 1% of the sample – see Table 11 below for more details.

**Table 11: Q11 – What interfered with enjoyment of site – main mentions**

	Alice Holt 2013 %	All England 2013 %
Nothing	86	81
Car parking expensive	2	2
Problems with car park	2	1
Poor weather	2	3
Dogs off leads / running loose	2	1
Poor service in the café	1	1
Need more shelters / covered picnic areas	1	<1
Too busy	1	1
Dog mess on the paths / in the play area	1	1

Base: All visitors – Alice Holt 2013 (241); All England 2013 (1,545)

## 6. Site facilities

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### 6.1 Importance of site facilities

Visitors were presented with a list of facilities available at Alice Holt and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

The play area and equipment were mentioned by the highest proportion of visitors to Alice Holt (71%) reflecting the high proportion of families who were visiting this site. This figure was higher than the proportion saying this in the previous research (45%) and significantly higher than the all England average (23%). All other facilities at the site were mentioned by significantly smaller proportions of visitors.

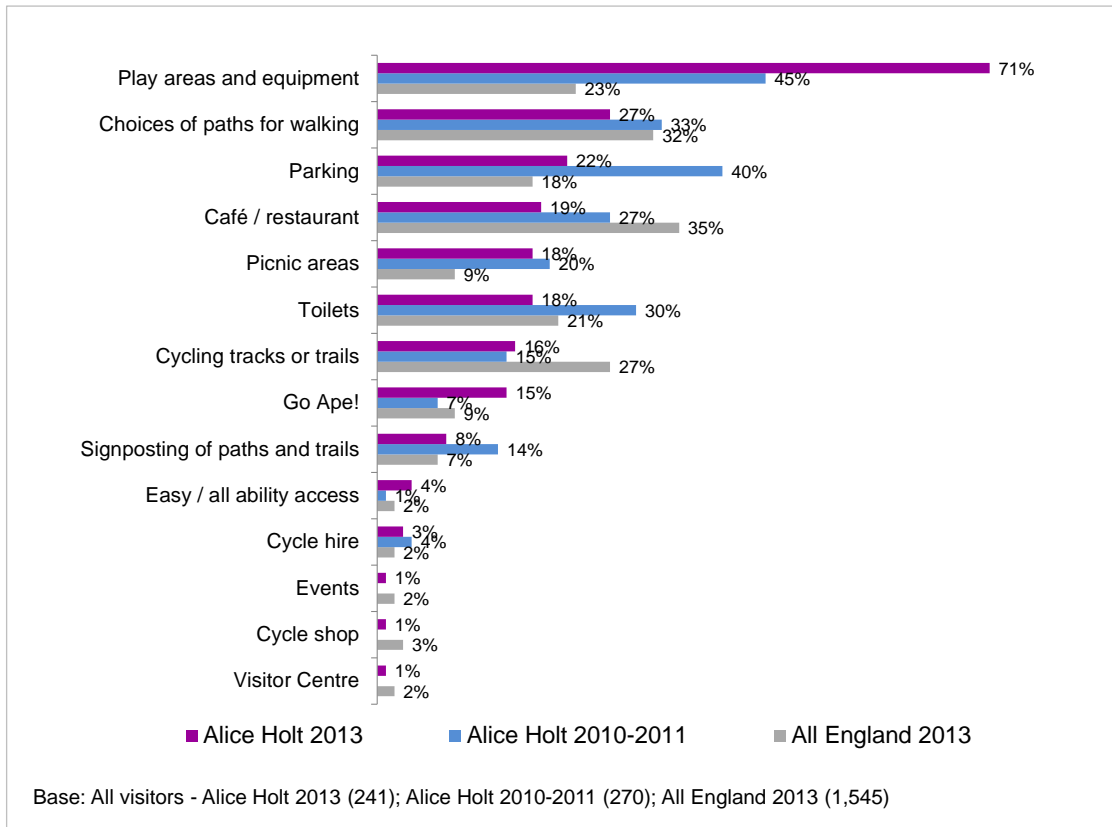
The choice of paths for walking was important to a quarter of visitors (27%), while one in five mentioned the parking (22%), café / restaurant (19%), picnic areas and toilets (18% for each).

Significantly more visitors to Alice Holt mentioned that parking was important to their decision to visit back in 2010-2011 (40%). This was also the case for the café / restaurant (27%) and the toilets (30%).

Moreover, café facilities were more likely to be mentioned by the all England sample (35%), as were cycling tracks and trails (27% compared to 16% at Alice Holt).

The relative importance of the Go Ape! facility had more than doubled since 2010-2011 (15% in 2013 compared to 7% previously) – see Figure 10 overleaf for more details.

**Figure 10: Q14. Importance of different facilities in deciding to visit the site**



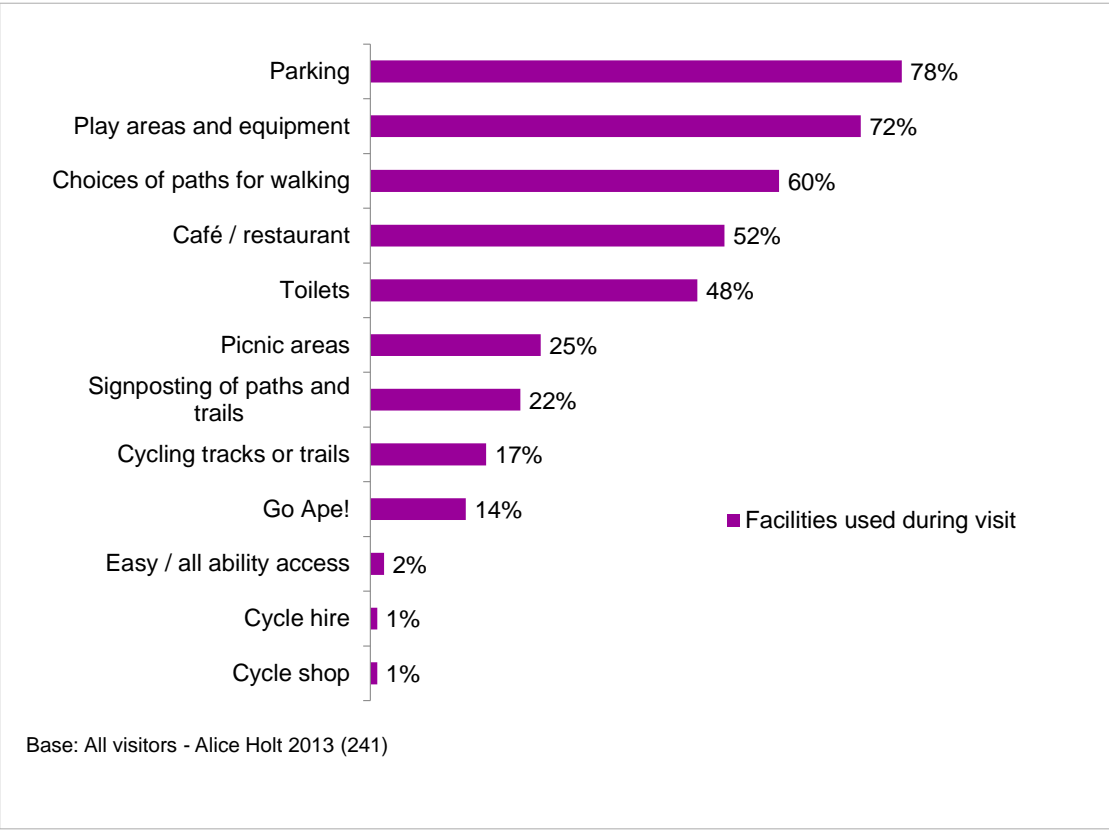
## 6.2 Facilities used

Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The parking was used by the highest proportion of visitors (78%), closely followed by the play areas (72%). Three in five mentioned the walking paths (60%), while half used the café / restaurant (52%) or the toilets (48%).

A quarter of visitors used the picnic areas (25%) or the signposts situated on paths and trails (22%); a further 17% used the cycling tracks and 14% went to Go Ape! – see Figure 11 below.

**Figure 11: Q15a. Facilities used at Alice Holt 2013**





Some sub-group differences were observed; eight in ten of those with children used the play facilities (81%), while 25% of those belonging to the AB social groups took part in Go Ape!

Walking paths were less likely to be used by visitors aged 35-54 years (56%) and more likely to be used by those aged over 55 years (66%).

Those belonging to the C2DE social groups were more likely to use the café (61%) and less likely to use the picnic areas (16%) compared to those belonging to the ABC1 groups (49% and 28% respectively).

None of the visitors aged 55+ interviewed at Alice Holt mentioned using the cycle tracks or trails.

### 6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by more than 10% of the overall sample at Alice Holt have been detailed in Figure 12 below.

Ratings of all facilities used were overwhelmingly positive, with very few visitors giving any of the facilities a poor rating, and the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

The facility that received the highest scores was the Go Ape! facility; three in five of the visitors using this rated it as ‘excellent’, with another 21% having said it is ‘very good’.

Around half of those who used the cycling tracks or the play areas gave these ‘excellent’ ratings (54% and 52% respectively), with another two in five rating these facilities as very good (41% and 38% respectively).

The facilities that received the least positive ratings were the parking (20% saying ‘excellent’) and the café (17% saying excellent’). Saying that, most visitors who used these were positive about them to a certain extent – see Figure 12 below for more details of the ratings given for each facility.

**Figure 12: Q15b. Rating of Alice Holt site facilities (where used) 2013**

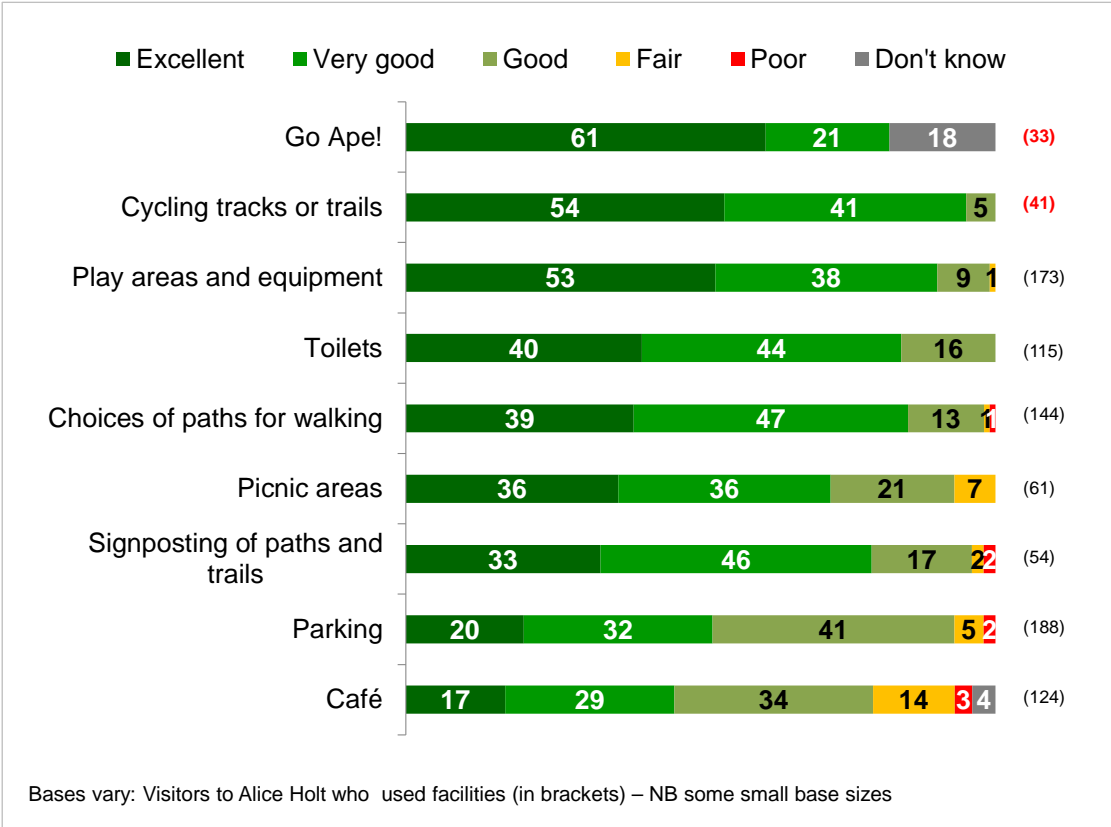


Table 12 compares the proportions who gave ‘excellent’ ratings to the facilities used in 2013 with those who did so in 2010-2011.

For virtually all of the facilities listed, the proportions who gave an ‘excellent’ rating increased since the previous research, with the most significant increases seen in the proportions rating the cycling tracks, the toilets and the picnic areas as ‘excellent’ (38%, 25% and 21% increases respectively) – see Table 12 below for more details.

**Table 12: Q15b – Proportions rating facilities at Alice Holt as ‘Excellent’ 2013 vs. 2010-2011**

Facilities	Alice Holt 2013 %	Alice Holt 2010-2011 %	% change
Go Ape!	61	49	+12
Cycling tracks or trails	54	16	+38
Play areas and equipment	53	36	+17
Toilets	40	15	+25
Choice of paths for walking	39	25	+14
Picnic areas	36	15	+21
Signposting of paths and trails	33	16	+17
Parking	20	21	-1
Café	17	14	+3

Bases vary: visitors using each facility

## 7. Information about sites

### 7.1 Sources used to plan visit

Visitors were asked were they found out about the Alice Holt as a place to visit. This question was prompted and visitors could mention as many sources of information as were applicable.

Amongst first-time visitors to Alice Holt, most heard about the site via word of mouth (56%), and this was by far the most frequently mentioned source of information for this group. Saying that, the proportion who mentioned word of mouth had decreased significantly amongst first-time visitors since 2010-2011 (72%).

Amongst repeat visitors to Alice Holt, the majority said that they have been there before, or they have always known about it (59%); while this was consistent with the findings in 2010-2011 (61%), it was smaller than the all England average (69%) - see Table 13 for more details.

**Table 13: Q8 – How found out about the site as a place to visit**

	First Time Visitors			Repeat Visitors		
	Alice Holt 2013 %	Alice Holt 2010-2011 %	All England 2013 %	Alice Holt 2013 %	Alice Holt 2010-2011 %	All England 2013 %
Word of mouth	56	72	43	34	35	25
Always known about it / been here before	17	11	19	59	61	69
Google / internet	16	9	18	2	2	4
Forestry Commission Website	6	-	4	2	-	2
Live locally	2	-	1	2	-	1
Just passing / en route	2	-	5	1	-	1
Road signs	-	2	1	1	4	1

Bases vary: First time vs. repeat visitors

## 7.2 Visiting other sites

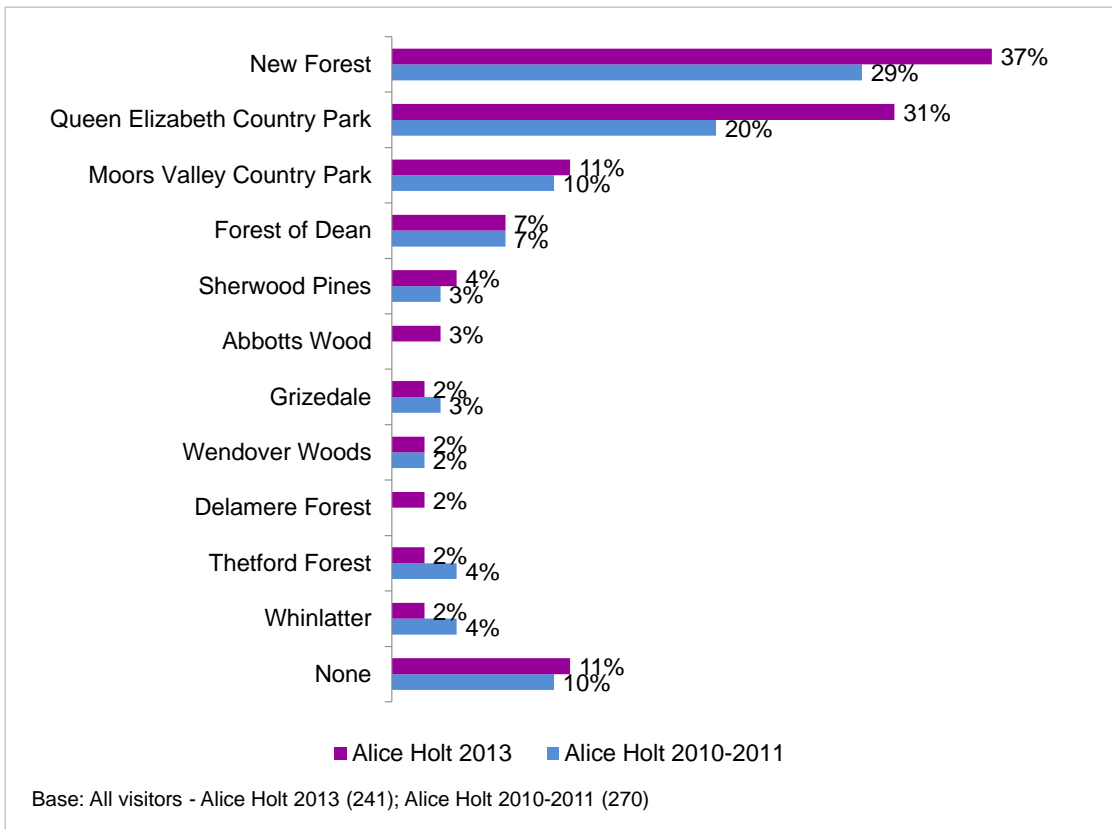
Visitors to Alice Holt were presented with a list of FCE managed forests and woodlands, and asked whether they had visited any of these other sites in the last 12 months. Around two thirds of visitors to Alice Holt had been to at least one other site (65%), and those that were mentioned by 2% of the sample or more are detailed in Figure 13 below, along with the proportions that mentioned each site back in 2010-2011.

The New Forest was mentioned by the highest proportion of visitors to Alice Holt (37%); this was also the case in 2010-2011. However, a smaller proportion claimed to have visited the New Forest back then (29%).

Around a third of Alice Holt visitors had also visited Queen Elizabeth Country Park (31%), and while this was also the second most frequently mentioned site in 2010-2011, a smaller proportion had been there then (20%).

Moors Valley Country Park and the Forest of Dean were visited by around one in ten of the visitors to Alice Holt (11% and 7% respectively) – see Figure 13 overleaf for more details.

**Figure 13: Other sites visited in the last 12 months**



## 8. Discovery passes

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### 8.1 Uptake and interest in season tickets and annual Discovery Passes

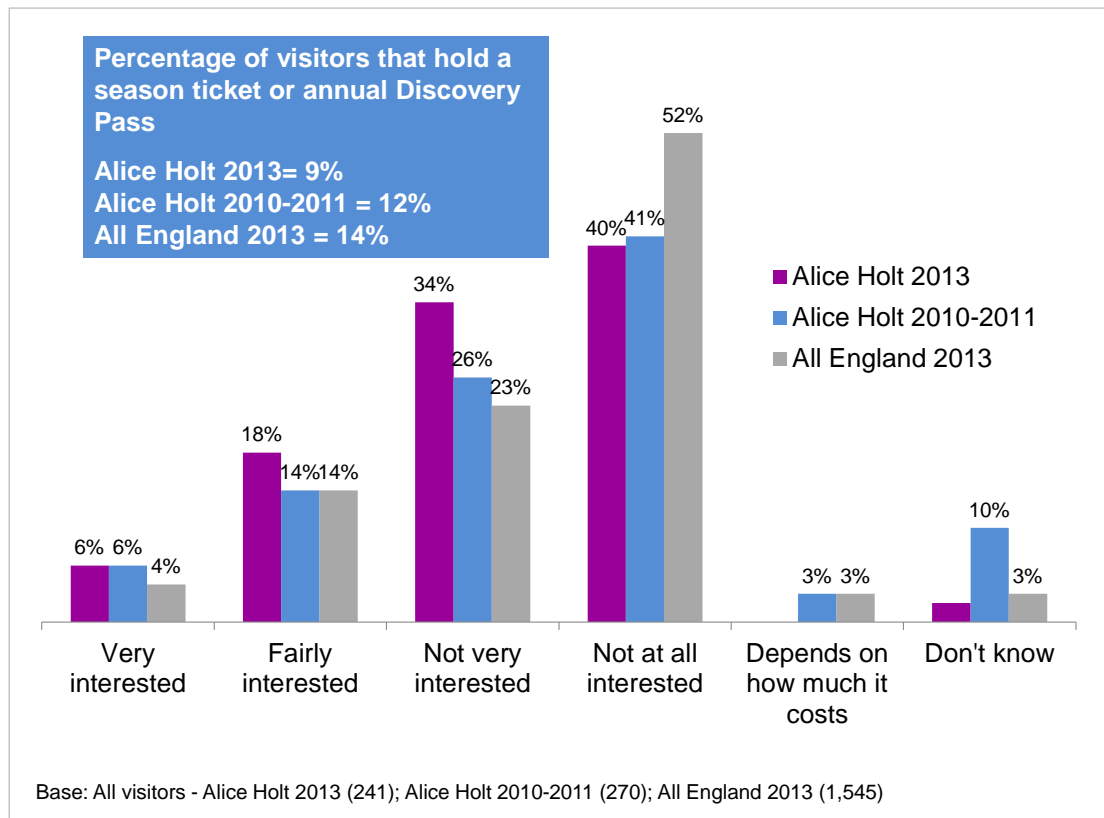
In 2013, around one in ten visitors to Alice Holt held a season ticket or annual Discovery Pass (9%), which was lower than the all England average of 14%, and also lower than the figure of 12% seen previously at Alice Holt.

All visitors (whether they currently hold a pass or not) were then asked how interested they would be in purchasing one in the future. They were prompted with the price (approximately £70) and the benefits (free parking and discounts to FCE sites).

Although levels of interest in purchasing an Annual Discovery Pass were relatively low (24% very or fairly interested), they are higher than those seen in 2010-2011 (20%) and higher than the all England average (18%).

However, the majority (74%) were not interested in purchasing a pass (34% 'not very interested', 40% 'not at all interested') – see Figure 14 overleaf.

**Figure 14: Current usage and levels of interest in season tickets and annual Discovery Passes**




Interest in purchasing an Annual Discovery pass is higher than average amongst those belonging to the AB social groups (30%) and repeat visitors (27%).



# Appendix I

## Questionnaire

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  2 Museum Place, Cardiff, CF10 3BG	<b>B01326-1</b>  <b>NRW / FCE</b>  <b>Quality of Visitor Experience</b>  <b>FINAL questionnaire</b>  <b>ENGLAND - MASTER</b>	<b>FOR OFFICE USE ONLY</b>		<b>INTERVIEWER RECORD</b> <b>WEATHER CONDITIONS (3-6m)</b>  <b>CAN MULTI-CODE</b> Sunshine 1 Cloud 2 Rain 3 Wind 4  Other (specify) _____
	Case No. _____	Point (1-2) _____		

**APPROACH ADULTS AGED 16+ - READ OUT**

Hello, my name is ..... of Beaufort Research. We are conducting some market research in this area on behalf of the Forestry Commission to find out how this site is being used, and your views on the site and the facilities it offers. Your feedback will help to improve the quality of the visitor experience at this site and ensure that managed woodlands such as this are welcoming places to be.

**Reassure if necessary:** Beaufort is an independent market research company and we are not selling anything.

Can you spare just a few minutes to answer some questions? The interview should only take around 10 minutes to complete and all of your responses will be treated with the strictest confidence, and will only be reported in combination with the answers of other visitors.

**S1** Have you come to the end of your visit, or are you about to come to the end of your visit here?

- Yes → **CONTINUE**
- No → **THANK AND CLOSE**

**ASK ALL**

**Q1** Can I just check how many people there are in total in your group?  
**WRITE IN NUMBER FOR EACH GROUP – IF NONE RECORD Ø**

- Adults aged 16+ (including respondent) \_\_\_\_\_
- Children aged 0-5 years \_\_\_\_\_
- Children aged 6-10 years \_\_\_\_\_
- Children aged 11-15 years \_\_\_\_\_

(9-10)  
(11-12)  
(13-14)  
(15-16)

**SHOWCARD A**

**Q2** Which of the following best describes your trip today  
**SINGLE CODE**

- A day trip of less than 3 hours away from home
- A day trip of more than 3 hours away from home
- A visit that includes an overnight stay
- Part of a longer holiday / visit
- Don't know

(18)  
  
1  
2  
3  
4  
5

## SHOWCARD B

**Q3** How often, on average do you come to this site?

### SINGLE CODE

1 <sup>st</sup> visit	Every day	4-6 x per week	1-3 x per week	1-3 x per month	4-6 x per year	1-3 x per year	Less often	DK
1	2	3	4	5	6	7	8	9

(20)

## SHOWCARD C

**Q4a** Which of these activities have you personally taken part in during your visit here today?

### RECORD IN COLUMN A - CODE ALL MENTIONED

### ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

## SHOWCARD C AGAIN

**Q4b** And which of these activities have other members of your group taken part in during your visit here today?

### RECORD IN COLUMN B - CODE ALL MENTIONED

## ASK ALL - SHOWCARD C AGAIN

**Q5** And which of these activities are you (**IF PART OF GROUP:** or other members of your group) planning to take part in during your visit here today?

### RECORD IN COLUMN C - CODE ALL MENTIONED

ACTIVITY		Column A Q4a (21-24m)	Column B Q4b (29-32m)	Column C Q5 (37-40m)
1	* Cycling on forest roads, tracks or trails	1	1	1
2	* Cycling / mountain biking off trails or tracks	2	2	2
3	* Dog walking	3	3	3
4	* Walking on a sign-posted trail	4	4	4
5	* Walking but not following sign posts	5	5	5
6	* Orienteering	6	6	6
7	Using the café / restaurant / other catering	7	7	7
8	Using the visitor centre / shop	8	8	8
9	Using the play area	9	9	9
10	* Running / jogging	A	A	A
11	Nature / natural history visit	B	B	B
12	Bird watching	C	C	C
13	Photography	D	D	D
14	Motor sports	E	E	E
15	Educational visit	F	F	F
16	* Horse riding / pony trekking	G	G	G
17	Picnic	H	H	H
18	Barbeque	I	I	I
19	Seeing something in the forest	J	J	J
20	Organised event / trip	K	K	K
21	Admiring the views	L	L	L
22	Fishing	M	M	M
23	Meeting / conference	N	N	N
24	Camping	O	O	O
		(25-28m)	(33-36m)	(41-44m)
25	Go Ape!	A	A	A
26	A trim trail / exercise trail	B	B	B
27	A Forest Drive	C	C	C
28	Other (please specify)	X	X	X
	None of these	M	M	M

**ASK ALL**

**SHOWCARD D**

**Q6** Approximately how long have you spent here today in total?  
**SINGLE CODE – RECORD IN 1<sup>ST</sup> ROW OF GRID BELOW**

**Q7 - ONLY ASK FOR ACTIVITIES THAT HAVE BEEN CODED AT Q4a (COLUMN A)**

**SHOWCARD D AGAIN**

**Q7** And approximately how long have you spent here today.....?  
**SINGLE CODE**

	0-15 mins	16-30 mins	31-60 mins	1-2 hours	2-3 hours	3-5 hours	5+ hours	DK	
<b>Q6 – TOTAL HOURS SPENT</b>	1	2	3	4	5	6	7	8	(50)
<b>Q7 - READ OUT IF CODED AT Q4a</b>									
Cycling on forest roads, tracks or trails	1	2	3	4	5	6	7	8	(51)
Cycling / mountain biking off trails or tracks	1	2	3	4	5	6	7	8	(52)
Dog walking	1	2	3	4	5	6	7	8	(53)
Walking on a sign-posted trail	1	2	3	4	5	6	7	8	(54)
Walking but not following sign posts	1	2	3	4	5	6	7	8	(55)
Orienteering	1	2	3	4	5	6	7	8	(56)
Running / jogging	1	2	3	4	5	6	7	8	(57)
Horse riding / pony trekking	1	2	3	4	5	6	7	8	(58)

**ASK ALL**

**SHOWCARD E**

**Q8** How or where did you find out about this site as a place to visit?  
**CODE ALL MENTIONED**

(59-62m)

Always known about it	1
Been here before	2
Word of mouth	3
Library	4
Local newspaper	5
National newspaper	6
Leaflet	7
Tourist Board	8
Road signs	9
Just passing / en route	A
Map	B
Smartphone app	C
Facebook	D
Twitter	E
Forestry Commission website	F
Natural Resources Wales website	G
Google	H
Other website (please specify) _____	X
Other (please specify) _____	X
	(63-66m)
Don't know / can't remember	M

<b>Q9</b>	What do you like most about the site? <b>PROBE</b> Anything else? <b>DO NOT PROMPT – CODE ALL MENTIONED</b>	(70-73m)
	Peace / tranquillity / relaxation	1
	Scenery / views / beautiful	2
	Walks / paths / trails	3
	Cycle trails / freedom / opportunity to cycle	4
	Wildlife / bird watching	5
	Fresh air / being outside	6
	Exercise / keeping fit	7
	Activities / good for / something to do with the children	8
	Close to home / convenient	9
	Opportunity to spend time with family / friends	A
	Safe environment	B
	Lots to see and / or do	C
	Like forests / trees / variety of trees	D
	Good on-site facilities	E
	Clean / well looked-after	F
	The weather	G
	Been before / wanted to come again	H
	Helpful / pleasant staff	I
	Plenty / cheap / other reference to parking	J
	Cost / value for money	K
	Other (please specify) _____	X
	Nothing	(74-77m) L
	Don't know	M
<b>Q10</b>	What, if anything, would enhance your enjoyment of this site? <b>PROBE</b> Anything else? <b>RECORD VERBATIM</b> <b>IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</b>	(78-81m)
	_____	
	_____	
	_____	
	Nothing	L
	Don't know	M
<b>Q11</b>	What, if anything, interfered with your enjoyment of this site today? <b>PROBE</b> Anything else? <b>RECORD VERBATIM</b> <b>IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</b>	(82-85m)
	_____	
	_____	
	_____	
	Nothing	L
	Don't know	M

**SHOWCARD F**

**Q12** How would you rate the site in terms of how safe and welcoming it feels?

**SINGLE CODE**

- Excellent
- Very good
- Good
- Fair
- Poor
- Very poor
- Don't know / not sure

**ONLY ASK Q13 IF CODED 1-6 AT Q12**

**Q13** What are the reasons for your rating? **PROBE** Anything else?

**RECORD VERBATIM**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Don't know

**ASK ALL**

**SHOWCARD G**

**Q14** Looking at this card, which of these aspects were important to your decision to visit today? **PROBE** Any others?

**CODE ALL MENTIONED**

95-98m		
1	Access to the Beach	1
2	Animal Puzzle Trail	2
3	Arboretum	3
4	Art or Sculpture in the Forest	4
5	Baby Changing Facilities	5
6	BBQ	6
7	Beamer Trampler - motorised wheelchair hire	7
8	Bike Skills Area	8
9	Bike Wash	9
10	Bird Hide	A
11	Bus Links	B
12	Café	C
13	Camp Site	D
14	Caravan Site	E
15	Centre for Contemporary Art and the Natural World	F
16	Choices of Paths for Walking	G
17	Community Discovery Centre	H
18	Community Orchard	I
19	Conference Facilities	J
20	Craft Barns	K
21	Cycle Hire	L
22	Cycle Shop	M
23	Cycling Tracks or Trails	N

99-102m		
24	Disabled Facilities	1
25	Dog Waste Bins	2
26	Easy / All Ability Access	3
27	Educational	4
28	Events	5
29	Fenced Dog Training Area	6
30	Fishing	7
31	Forest Classroom	8
32	Forest Drive	9
33	Forest Holidays	A
34	Forest Shop	B
35	Go Ape!	C
36	Great Oak Hall	D
37	Heritage Site	E
38	Horse Riding	F
39	Information	G
40	Kite Feeding	H
41	Litter Bins	I
42	Motorsports	J
43	Museum	K
44	National Pinetum	L
45	Nature Reserve	M
46	Open grassy areas	N

103-106m		
47	Orienteering	1
48	Outdoor Arena	2
49	Parking	3
50	Parking charge	4
51	Picnic areas	5
52	Plant Centre	6
53	Play areas and equipment	7
54	Railway	8
55	Restaurant	9
56	Running Trails	A
57	Sensory Garden	B
58	Sign posting of paths and trails	C
59	Staff available at the site	D
60	Toilets	E
61	Trim Trail / Exercise area	F
62	Viewpoint	G
63	Visitor Centre	H
64	Watersports	I
65	Wildlife Activities	J
66	Wildlife Hide	K
67	Youth Shelters	L

(90)

1 }  
2 }  
3 } **Q13**  
4 }  
5 }  
6 }  
7 → **Q14**

(91-94m)

M

Other (please specify) \_\_\_\_\_ (107-110m)

**SHOWCARD G AGAIN**

**Q15a** Which aspects of the site have you used during your visit today?

**RECORD IN COLUMN A – CODE ALL MENTIONED**

**SHOWCARD H**

**Q15b** Now I would like you to rate each of the aspects of the site that you have used during today's visit. So how would you rate....?

**ONLY ASK FOR ASPECTS THAT HAVE BEEN CODED AT Q15a – IF 'NONE' OR 'D/K' AT Q15a, SKIP TO Q16, DO NOT ASK Q15b**

ASPECTS USED		Q15a COL. A  CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(120-123m)								
1	Access to the Beach	1	1	2	3	4	5	6	7	(140)
2	Animal Puzzle Trail	2	1	2	3	4	5	6	7	(141)
3	Arboretum	3	1	2	3	4	5	6	7	(142)
4	Art or Sculpture in the Forest	4	1	2	3	4	5	6	7	(143)
5	Baby Changing Facilities	5	1	2	3	4	5	6	7	(144)
6	BBQ	6	1	2	3	4	5	6	7	(145)
7	Beamer Tramper - motorised wheelchair hire	7	1	2	3	4	5	6	7	(146)
8	Bike Skills Area	8	1	2	3	4	5	6	7	(147)
9	Bike Wash	9	1	2	3	4	5	6	7	(148)
10	Bird Hide	A	1	2	3	4	5	6	7	(149)
11	Bus Links	B	1	2	3	4	5	6	7	(150)
12	Café	C	1	2	3	4	5	6	7	(151)
13	Camp Site	D	1	2	3	4	5	6	7	(152)
14	Caravan Site	E	1	2	3	4	5	6	7	(153)
15	Centre for Contemporary Art and the Natural World	F	1	2	3	4	5	6	7	(154)
16	Choices of Paths for Walking	G	1	2	3	4	5	6	7	(155)
17	Community Discovery Centre	H	1	2	3	4	5	6	7	(156)
18	Community Orchard	I	1	2	3	4	5	6	7	(157)
19	Conference Facilities	J	1	2	3	4	5	6	7	(158)
20	Craft Barns	K	1	2	3	4	5	6	7	(159)
21	Cycle Hire	L	1	2	3	4	5	6	7	(160)
22	Cycle Shop	M	1	2	3	4	5	6	7	(161)
23	Cycling Tracks or Trails	N	1	2	3	4	5	6	7	(162)
24	Disabled Facilities	O	1	2	3	4	5	6	7	(163)
		(124-127m)								
25	Dog Waste Bins	1	1	2	3	4	5	6	7	(164)
26	Easy / All Ability Access	2	1	2	3	4	5	6	7	(165)
27	Educational	3	1	2	3	4	5	6	7	(166)
28	Events	4	1	2	3	4	5	6	7	(167)
29	Fenced Dog Training Area	5	1	2	3	4	5	6	7	(168)
30	Fishing	6	1	2	3	4	5	6	7	(169)
31	Forest Classroom	7	1	2	3	4	5	6	7	(170)
32	Forest Drive	8	1	2	3	4	5	6	7	(171)
33	Forest Holidays	9	1	2	3	4	5	6	7	(172)
34	Forest Shop	A	1	2	3	4	5	6	7	(173)
35	Go Ape!	B	1	2	3	4	5	6	7	(174)
36	Great Oak Hall	C	1	2	3	4	5	6	7	(175)
37	Heritage Site	D	1	2	3	4	5	6	7	(176)
38	Horse Riding	E	1	2	3	4	5	6	7	(177)

**LIST CONTINUED OVERLEAF**

39	Information	F	1	2	3	4	5	6	7	(178)
40	Kite Feeding	G	1	2	3	4	5	6	7	(179)
41	Litter Bins	H	1	2	3	4	5	6	7	(180)
42	Motorsports	I	1	2	3	4	5	6	7	(181)
43	Museum	J	1	2	3	4	5	6	7	(182)
44	National Pinetum	K	1	2	3	4	5	6	7	(183)
45	Nature Reserve	L	1	2	3	4	5	6	7	(184)
46	Open grassy areas	M	1	2	3	4	5	6	7	(185)
47	Orienteering	N	1	2	3	4	5	6	7	(186)
48	Outdoor Arena	O	1	2	3	4	5	6	7	(187)
		(128-131m)								
49	Parking	1	1	2	3	4	5	6	7	(188)
50	Parking charge	2	1	2	3	4	5	6	7	(189)
51	Picnic areas	3	1	2	3	4	5	6	7	(190)
52	Plant Centre	4	1	2	3	4	5	6	7	(191)
53	Play areas and equipment	5	1	2	3	4	5	6	7	(192)
54	Railway	6	1	2	3	4	5	6	7	(193)
55	Restaurant	7	1	2	3	4	5	6	7	(194)
56	Running Trails	8	1	2	3	4	5	6	7	(195)
57	Sensory Garden	9	1	2	3	4	5	6	7	(196)
58	Sign posting of paths and trails	A	1	2	3	4	5	6	7	(197)
59	Staff available at the site	B	1	2	3	4	5	6	7	(198)
60	Toilets	C	1	2	3	4	5	6	7	(199)
61	Trim Trail / Exercise area	D	1	2	3	4	5	6	7	(200)
62	Viewpoint	E	1	2	3	4	5	6	7	(201)
63	Visitor Centre	F	1	2	3	4	5	6	7	(202)
64	Watersports	G	1	2	3	4	5	6	7	(203)
65	Wildlife Activities	H	1	2	3	4	5	6	7	(204)
66	Wildlife Hide	I	1	2	3	4	5	6	7	(205)
67	Youth Shelters	J	1	2	3	4	5	6	7	(206)
	None of these	M								
	Don't know	N								



**ASK ALL**

**SHOWCARD H AGAIN**

**Q16** Overall, how would you rate this site as a place to visit?  
**SINGLE CODE**

- Excellent
- Very good
- Good
- Fair
- Poor
- Very poor

Don't know / not sure

(210)

- 1
- 2
- 3
- 4
- 5
- 6
- 7

**Q17** Using a scale of 0 – 10, where 0 means 'Not at all likely' and 10 means 'Extremely likely', how likely is it that you would recommend this site as a place to visit to a friend or relative?  
**SINGLE CODE**

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

(211)

**ONLY ASK Q18a IF MORE THAN ONE PERSON IN GROUP**

**SHOWCARD I**

**Q18a** Thinking about the whole of the group you are with today, how much do you think the whole group are likely to spend in the local area on the following things as a result of your visit today?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND  
IF NONE RECORD 0**

- Accommodation, including food and drink purchased there \_\_\_\_\_ (212-217)
- Food and drink purchased outside any accommodation \_\_\_\_\_ (218-223)
- Admissions fees to attractions \_\_\_\_\_ (224-229)
- Parking \_\_\_\_\_ (230-235)
- Non-routine shopping (e.g. buying souvenirs) \_\_\_\_\_ (236-241)
- Transport including petrol, taxis, public transport etc. \_\_\_\_\_ (242-247)
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_ (248-253)
- Other miscellaneous items \_\_\_\_\_ (254-259)

**NOW GO TO  
Q19**

**INSTRUCTION - ONLY ASK Q18b RESPONDENT IS ALONE**

**SHOWCARD I**

**Q18b** How much do you expect to spend in the local area on the following things as a result of your visit today?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND  
IF NONE RECORD 0**

- Accommodation, including food and drink purchased there \_\_\_\_\_ (261-266)
- Food and drink purchased outside any accommodation \_\_\_\_\_ (267-272)
- Admissions fees to attractions \_\_\_\_\_ (273-278)
- Parking \_\_\_\_\_ (279-284)
- Non-routine shopping (e.g. buying souvenirs) \_\_\_\_\_ (285-290)
- Transport including petrol, taxis, public transport etc. \_\_\_\_\_ (291-296)
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_ (297-302)
- Other miscellaneous items \_\_\_\_\_ (303-308)

**SHOWCARD J AND SHOW MAP**

**Q19** Looking at this map, can you tell me which of these other sites, if any, you have visited in the last 12 months?

(320-323m)

**CODE ALL MENTIONED**

Alice Holt Forest	1
Abbotts Wood	2
Bedgebury Forest and Pinetum	3
Cannock Chase	4
Cardinham Woods	5
Chambers Farm Wood	6
Chopwell	7
Dalby Forest	8
Delamere Forest	9
Dunwich Forest	A
Fineshade Woods	B
Forest of Dean	C
Gisburn	D
Grizedale	E
Guisborough Forest	F
Haldon Forest Park	G
Hamsterley	H
Haughmond Hill	I
Hicks Lodge	J
Jeskyns	K
Kielder Forest	L
Moors Valley Country Park	M
New Forest	N
Queen Elizabeth Country Park	O
	(324-327m)
Rendlesham Forest	1
Rosliston	2
Rowney Warren	3
Salcey Forest	4
Savemake Forest	5
Sherwood Pines	6
Thames Chase	7
Thetford Forest	8
Wendover Woods	9
Westonbirt Arboretum	A
West Walk	B
Wharncliffe	C
Whinlatter	D
Wyre Forest	E
Other woodland / forest in England (please specify) _____	(328-331m)
Other woodland / forest in Wales (please specify) _____	
None of these	M
Don't know / can't remember	N
For office use only: 332-600 for Wales sites	

<b>Q20a</b> Do you currently hold an annual Discovery Pass or Friends membership for this site?	(601)
Yes	1
No	2
Don't know / can't remember	3

**SHOWCARD K**

<b>Q20b</b> Currently you can get season tickets or Discovery Passes for individual Forestry Commission sites in a local area. How interested would you be in having a pass that allowed free parking and discounts at all Forestry Commission sites nationally? This would probably cost around £70 per year, per household. <b>SINGLE CODE</b>	(602)
Very interested	1
Fairly interested	2
Not very interested	3
Not at all interested	4
Depends on how much it costs – <b>DO NOT PROMPT WITH THIS CODE</b>	5
Don't know	6

**ASK ALL**

**READ OUT** – Finally, I'd like to ask some questions for analytical purposes.

<b>Q21 INTERVIEWER RECORD GENDER</b>	(603)
Male	1
Female	2

<b>Q22</b> Which of the following age bands do you fall into?	(604)
16-24 years	1
25-34 years	2
35-44 years	3
45-54 years	4
55-64 years	5
65+ years	6
Refused	7

**SHOWCARD L**

<b>Q23</b> Which of these best describes your employment status right now? <b>SINGLE CODE</b>	(605)
Employee in full time job (30 hours plus a week)	1
Employee in part time job (under 30 hours per week)	2
Self-employed full or part time	3
On a government supported training programme	4
Full time education at school, college or university	5
Unemployed and available for work	6
Permanently sick / disabled	7
Wholly retired from work	8
Looking after the home	9
Other (please specify) _____	
Refused	Z

**Q24** Can you tell me the occupation of the Chief Income Earner within the household?  
 (The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. This person can be of either sex.) (606)

**NOTE: IF CHIEF INCOME EARNER IS RETIRED OR REGISTERED UNEMPLOYED, ASK FOR PREVIOUS OCCUPATION**

**Job title** \_\_\_\_\_

**Position / Grade** \_\_\_\_\_

- AB 1
- C1 2
- C2 3
- DE 4
- Refused 5

**Q25** Do you have any children aged 15 or under living in your household? (607)

- Yes 1
- No 2
- Refused 3

**Q26** Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?  
**INCLUDES PROBLEMS RELATED TO OLD AGE** (608)

- Yes – limited a lot 1
- Yes – limited a little 2
- No 3
- Refused 4

**SHOWCARD M**

**Q27** Which of these best describes your ethnic origin?

**SINGLE CODE**

White British  
 White Welsh  
 White Irish  
 White East European  
 White other European  
 Any other White background (please specify) \_\_\_\_\_

Caribbean  
 African  
 Any other Black background (please specify) \_\_\_\_\_

Indian  
 Pakistani  
 Bangladeshi  
 Any other Asian background (please specify) \_\_\_\_\_

White and Black Caribbean  
 White and Black African  
 White and Asian  
 Any other Mixed background (please specify) \_\_\_\_\_

Chinese

Other (please specify) \_\_\_\_\_

Refused

**Q28** So we can map where visitors have come from, can I please have your postcode?  
 Please be assured that this information will only be used for analysis purposes  
 and will not be used to identify individuals.

**ENSURE POSTCODE IS COLLECTED IN FULL WHERE POSSIBLE, OR AS MUCH OF POSTCODE AS RESPONDENT WILL PROVIDE**

(610)	(611)	(612)	(613)	(614)	(615)	(616)

Overseas visitor (please specify country) \_\_\_\_\_

(609)

1

2

3

4

5

E

6

7

F

8

9

A

G

B

C

D

H

J

I

Z

(617-618)

Respondent Name:					
Address:					
Telephone number:					
<b>THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.</b>					
<i>Interviewer Declaration:</i> I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:					
Signature				Date of interview:	
				(621)(622)(623)(624)	
WRITE IN YOUR INTERVIEWER NUMBER →				(625)	(626)
				(627)	(628)
<b>B01326-1</b>	<b>F.O.U (BACK CHECKS)</b>		<b>Accompanied</b>	<b>Yes 1</b> <b>No 2</b>	<b>Supervisor signature</b>

## Appendix II

### Explanation of social class categories

---

Social-class groupings are based on the occupation of the Head of Household (i.e. the chief income earner within the household). The following definition outlines the groupings used and the types of occupation included in each:

#### **AB**

Professionals, senior managers, middle management of large organisation, top management of small businesses.

#### **C1**

Junior management, owners of small establishments and all other non-manual positions.

#### **C2**

Skilled manual workers, manual workers with responsibility for other people.

#### **DE**

Semi-skilled and unskilled manual workers, apprentices and trainees to skilled workers, those dependent on state benefits, casual workers and those without regular income.

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[www.beaufortresearch.co.uk](http://www.beaufortresearch.co.uk)