

beaufortresearch

30 years of intelligent research

Research Report

Quality of the Visitor
Experience 2014

Bedgebury



Prepared for:
Natural Resources Wales /
Forestry Commission England

Prepared by:
Beaufort Research



**Cyfoeth
Naturiol
Cymru
Natural
Resources
Wales**



**Forestry Commission
England**

Contact Details

Agency contact: Sarah McDonough

Project: B01326-2

Date: March 2015

Beaufort Research

2 Museum Place

Cardiff

CF10 3BG

Tel: (029) 2037 8565

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

Terms of Contract

Unless otherwise agreed, the findings of this study remain the copyright of Beaufort Research Ltd and may not be quoted, published or reproduced without the company's advance approval.

Approval to quote or publish will only be withheld on the grounds of inaccuracy or misrepresentation.

Any approved publication must detail: Beaufort Research Ltd as provider, sample size and field dates.

© Beaufort Research Ltd 2015



Contents	Page
1. Executive summary	1
1.1 Quality of the Visitor Experience Research.....	1
1.2 Bedgebury	1
1.3 Perceptions of the site	1
1.4 Strengths of the site	2
1.5 Areas for improvement.....	2
1.6 Visitor profile	3
2. Introduction	4
2.1 Background.....	4
2.2 Research programme	5
2.3 Report	6
2.4 Data tables.....	6
3. Visitor profile information	7
3.1 Visitor profile	7
3.2 Group profile	9
3.2.1 Size of group.....	9
3.2.2 Composition of group.....	10
4. Profile of visit	11
4.1 Type of visit.....	11
4.2 Visitor origin	12
4.3 Frequency of visits	14
4.3.1 First-time visitors.....	14
4.3.2 Repeat visitors	14
4.4 Length of visit.....	15
4.5 Activities undertaken.....	16
4.6 Length of time spent on activities.....	18
4.7 Money spent at the site and in area as a result of the visit	19

5.	Perceptions of the site	22
5.1	Overall rating of the site as a place to visit.....	22
5.2	Overall rating of the site as safe and welcoming.....	23
5.3	Recommending the site as a place to visit.....	25
5.4	Favourite things about the site	27
5.5	Suggested improvements to the site.....	29
6.	Site facilities	32
6.1	Importance of site facilities.....	32
6.2	Facilities used	35
6.3	Rating of site facilities	37
7.	Information about sites	39
7.1	Sources used to plan visit	39
7.2	Visiting other sites.....	40
8.	Discovery passes.....	41
8.1	Uptake and interest in season tickets and annual Discovery Passes	41

Appendices

Appendix I - Questionnaire

Appendix II - Explanation of social class

1. Executive summary

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 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 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 2011, interviews were conducted at 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

This report summarises the findings from the 236 visitor interviews conducted at Bedgebury in 2014. Throughout the report, comparisons have been made to the previous research conducted in 2011, and the all England average (aggregated data from all 7 sites surveyed in 2014).

1.2 Bedgebury

Bedgebury Forest, based in the heart of South East England, is home to the National Pinetum. With nearly 10,000 trees and shrubs the Pinetum has the most complete collection of temperate conifers in the world.

The site has safe, healthy outdoor fun for all ages with a range of facilities and activities, including cycling, walking, riding, adventure play and Go Ape. Bedgebury Forest is also the site for many concerts.

1.3 Perceptions of the site

Perceptions of Bedgebury as a place to visit were very positive. This was also true across all England sites and was found in the previous study conducted in 2011. Very few visitors interviewed at Bedgebury in 2014 gave a negative rating of the site whilst almost half (47%) said it was excellent. This does, however, represent a drop in the excellent rating since 2011, when 59% said it was excellent.

Similarly, ratings of how safe and welcoming Bedgebury was felt to be were very positive. This was also found across all England sites and in the 2011 survey. Only a very small proportion of visitors interviewed at Bedgebury gave a less than positive rating of the site in terms of it being safe and welcoming (2%), whilst over half said it was excellent (53%). Although fewer visitors gave an excellent rating in 2014 compared to 2011 (63%), views were overall positive.

When asked whether they would be likely to recommend Bedgebury as a place to visit to a friend or relative (using a score of 0-10), scores for Bedgebury and all England sites generally were extremely positive: only 5% gave a rating of less than 8/10 for Bedgebury, and over half gave it full marks of 10 out of 10 (53%). Somewhat more visitors gave the top rating back in 2011 (72%), however, overall the mean scores are very consistent (9.3 in 2014 vs 9.4 in 2011). Across all England sites on average, the mean rating was 9.4.

1.4 Strengths of the site

No single aspect of Bedgebury stood out as favourite, with around a third of visitors enjoying the walks, paths and trails, the scenery and views or the cycle trails. A further quarter said their favourite aspect was the fresh air, the children's activities or the peace and tranquillity of the site.

1.5 Areas for improvement

Almost two fifths of visitors to Bedgebury could not think of anything that would add to their enjoyment and only made positive comments (39%); this was a similar proportion to the all England average (44%).

Most suggestions to improve the site were therefore made by relatively small numbers of visitors, however the main improvement required was made by a fairly substantial 17% of visitors: improvements to the café.

A little over one in ten (11%) wanted better parking facilities (easier, cheaper, more spaces) or better toilet / changing facilities.

Others asked for improved / more signage and maps (6%), more trails, paths and cycle tracks (6%) or longer, more challenging trails and tracks (4%).

1.6 Visitor profile

The majority of visitors to Bedgebury had visited the site before (77%) this is unchanged since 2011, and is in line with the all England average (76%).

Typically across all England sites, 84% were 'day trippers' and 16% were staying visitors, whereas at Bedgebury the split was 95% day trippers and 5% staying visitors. Almost all the Bedgebury visitors had travelled for less than three hours for their day trip (93%), which was a little higher than reported in the previous research (85%) and was considerably higher than the all England average (67%).

Group sizes were larger at Bedgebury (averaging 4.3 people) than the all England average (3.8 people). Compared to all England sites, visitors were also more likely to visit with children (67% vs. 59%): this was also reported in 2011, when around two thirds of Bedgebury visitors were there with children (67%).

The demographic profile of visitors to Bedgebury was largely in line with visitors to all England sites. The gender profile was slightly skewed towards males; 53% of visitors were men, and 47% were women. Typically the profile is skewed slightly towards females across all England sites: 48% of all England visitors were men and 52% were women.

Bedgebury visitors were similar in age to the all England average, being more likely to be under 45 than over: around two thirds of visitors at Bedgebury were under 45 (63%), whilst a third (37%) were aged over 45. Across England sites, the split was 61% under 45, 39% over 45.

Visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 74%) than C2DE (skilled and unskilled manual workers and the unemployed = 21%). This was also replicated across all England sites on average (71% ABC1, 28% C2DE). *NB 5% refused to answer this question in Bedgebury hence the total not equalling 100%.*

Over three fifths (62%) of Bedgebury visitors had children in the household, which was slightly higher than the all England average (54%).

The overwhelming majority of visitors to Bedgebury were white British / Welsh / Irish (96%), again this was in line with the all England data.

2. Introduction

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. NRW also manages a number of National Nature Reserves (NNRs) across Wales.

Each year in Wales, around 4 million visits are made to the woodland estate including 0.5 million to sites with visitor centres with a further 3 million visits made to NNRs. 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 and green-space can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming green space provides 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, woodlands and National Nature Reserves. 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 forests, woodlands and National Nature Reserves across England and Wales. In 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 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 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

Table 1 below details the sites surveyed in 2014, 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
Bedgebury	236	Alwen (M)	133
Delamere	240	Bwlch y Nant yr Arian (H)	190
Forest of Dean	230	Clocaenog (M)	136
Hamsterley	234	Coed y Brenin (H)	205
High Lodge, Thetford Forest	246	Cors Caron (H)	176
Salcey	239	Crychan (M)	125
Whinlatter	229	Garwnant (H)	189
TOTAL	1,654	TOTAL	1,154

* 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 ran from March to October 2014. At Bedgebury, interviewing took place between 29th March and 19th October, and a total of 236 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken Bedgebury in 2014, 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 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

3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Bedgebury. Table 2 overleaf details the profile of visitors, compared with the profile of visitors to all sites surveyed in England in 2014 and shows that the demographic profile of visitors to Bedgebury was largely in line with that of the visitors to all the England sites.

The gender profile was slightly skewed towards males; 53% of visitors were men, and 47% were women. Typically the profile is skewed slightly towards females across all England sites: 48% of all England visitors were men and 52% were women.

In terms of the age profile, Bedgebury visitors were similar in age to the all England average, being more likely to be under 45 than over: around two thirds of visitors at Bedgebury were under 45 (63%), whilst a third (37%) were aged over 45. Across England sites, the split was 61% under 45, 39% over 45.

Visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 74%) than C2DE (skilled and unskilled manual workers and the unemployed = 21%). This was also replicated across all England sites on average (71% ABC1, 28% C2DE). *NB 5% refused to answer this question in Bedgebury hence the total not equalling 100%.*

Over three fifths (62%) of Bedgebury visitors had children in the household, which was slightly higher than the all England average (54%).

The overwhelming majority of visitors to Bedgebury were white British / Welsh / Irish (96%), with only a small number of visitors describing their ethnicity as 'White Other European' (3%) or 'Black / Asian / Mixed' (1%) – again this was in line with the all England data – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2014

		Bedgebury %	All England %
Gender	Male	53	48
	Female	47	52
Age	16 - 24	3	5
	25 - 34	20	21
	35 – 44	40	35
	45 – 54	23	20
	55 – 64	9	11
	65+	5	8
Social class	AB	47	40
	C1	27	31
	C2	14	18
	DE	7	10
	Refused	5	1
Working status	Full-time employee (30+ hours per week)	59	59
	Part-time employee (<30 hours per week)	19	17
	Self-employed	10	5
	Full-time education	1	2
	Unemployed	-	1
	Permanently sick / disabled	<1	<1
	Retired	6	10
	Looking after home	3	5
	Other	<1	<1
	Refused	-	<1
Limiting illness	Yes – limited a lot	2	2
	Yes – limited a little	3	4
	No	93	92
	Refused	3	1
Children in household	Yes	62	54
	No	38	46
	Refused	<1	<1
Ethnicity	White – British / Welsh / Irish	96	96
	White – Other	3	3
	Black / Asian / Mixed	1	1
	Refused	-	<1

Base: All visitors – Bedgebury (236); All England (1,654)

3.2 Group profile

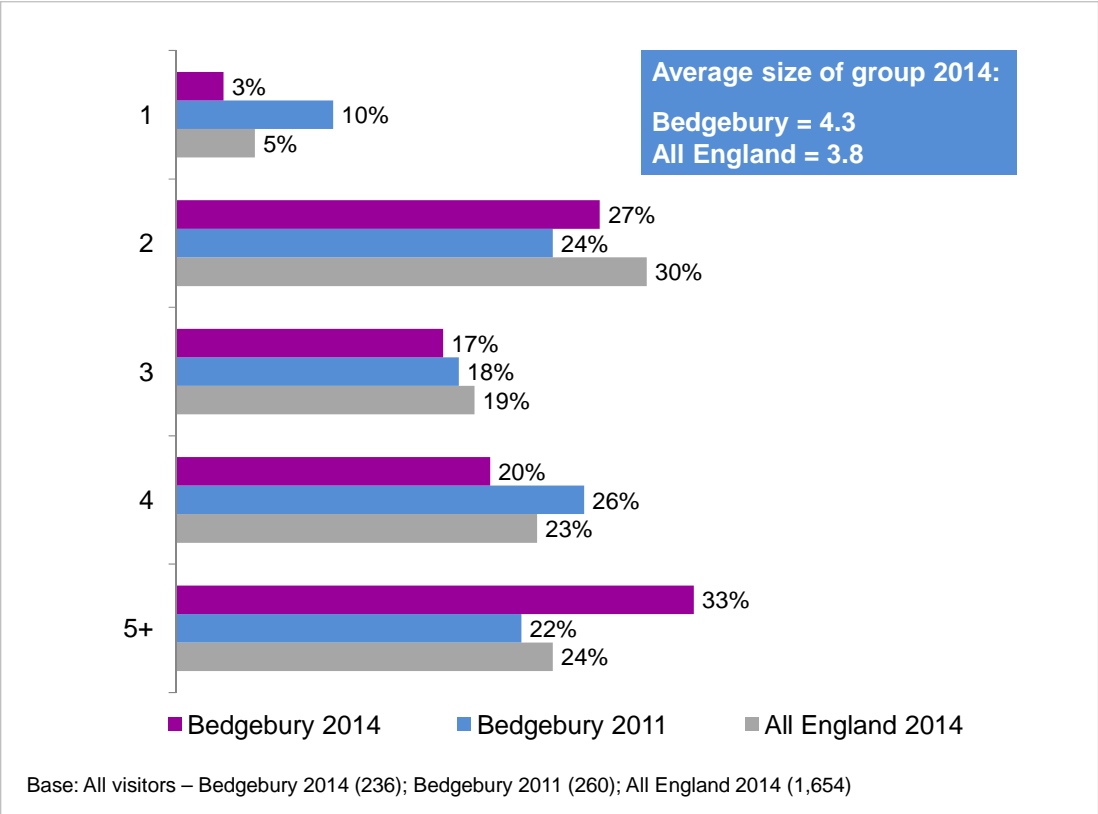
3.2.1 Size of group

Group sizes were larger at Bedgebury (averaging 4.3 people) than the all England average (3.8 people).

The most often seen group size at Bedgebury was 5+ visitors (33%): this has increased since 2011 (22%) and is also higher than the all England 2014 average (24%).

Just 3% were visiting Bedgebury alone, a significant drop from 10% in 2011, bringing solo visitors closer in line with the all England average (5%).

Figure 1: Q1. Total size of the group



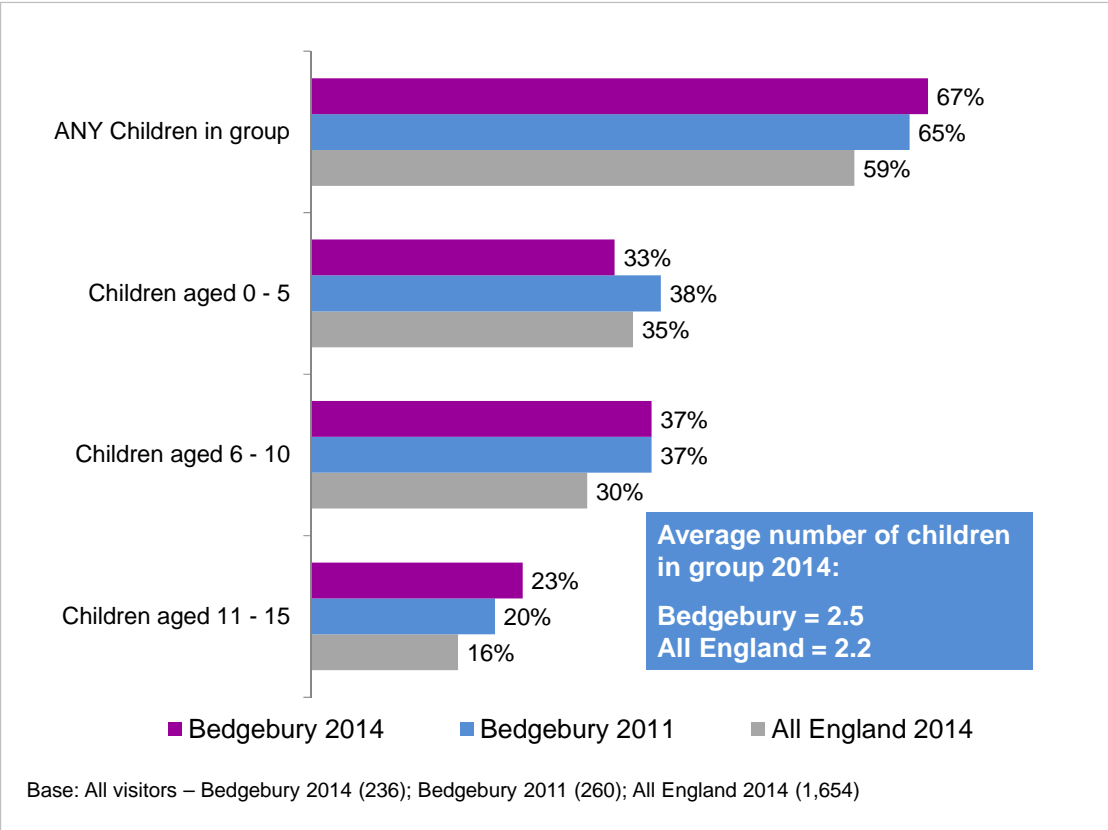
3.2.2 Composition of group

The majority of visitors were there with children (67%). This was in line with the 2011 research and is higher than the all England average (59%).

The average number of children per group visiting Bedgebury in 2014 was also higher than the all England average (mean of 2.5 children per group at Bedgebury compared with 2.2 all England).

The ages of children in the groups were largely consistent with the 2011 and the all England findings, with children aged 0-10 years more prominent than those aged 11-15 years.

Figure 2: Q1. Composition of group



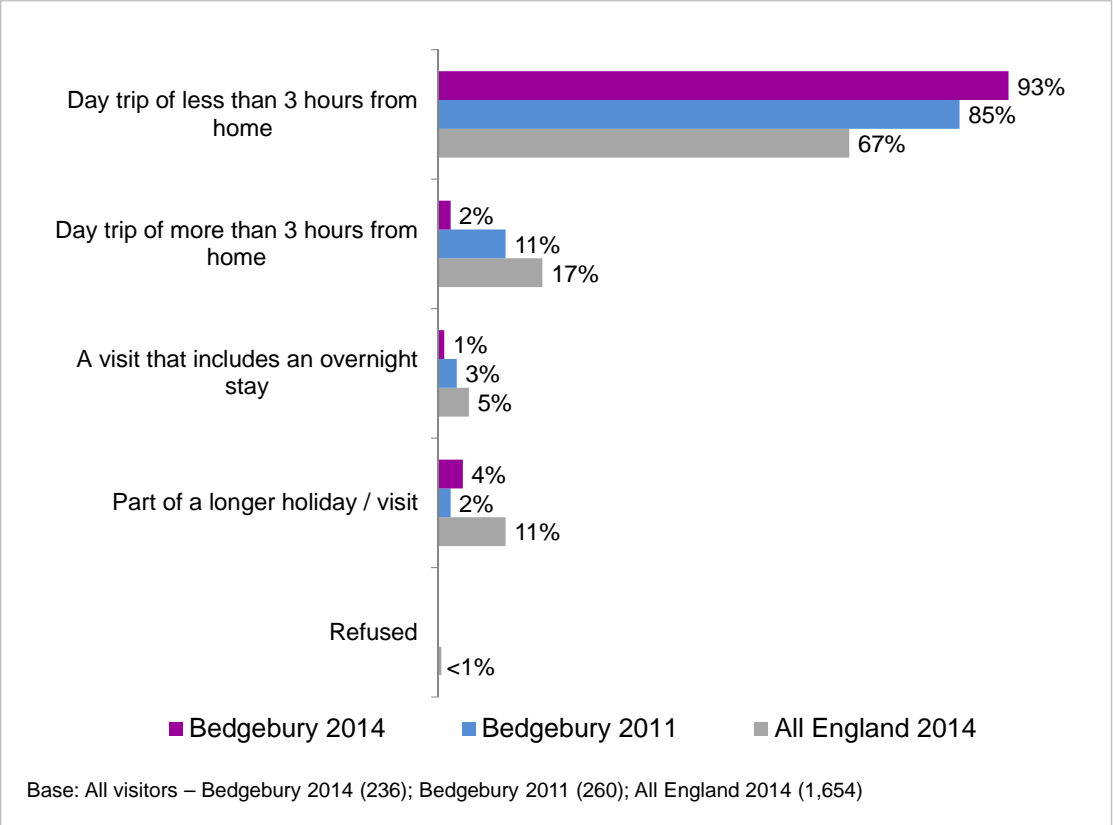
4. Profile of visit

4.1 Type of visit

Typically across all England sites, 84% were 'day trippers' and 16% were staying visitors, whereas at Bedgebury the split was 95% day trippers and 5% staying visitors.

Almost all the Bedgebury visitors had travelled for less than three hours for their day trip (93%), which was a little higher than reported in the previous research (85%), and considerably higher than the all England average (67%).

Figure 3: Q2. Type of visit



4.2 Visitor origin

Visitors were asked to provide their postcode in order to determine their area of residence.

The vast majority of the visitors to Bedgebury travelled from within England, most of whom came from South East England (93%). The remaining English visitors had come from London (2%) or the South West (2%). Only 1% came from either Wales or from abroad.

Table 3 below and Figure 4 overleaf provide more details.

Table 3: Q28b. Visitor origin 2014

		Bedgebury %	All England %
Home region	North East England	-	14
	Yorkshire & Humberside	<1	3
	North West England	-	21
	West Midlands	-	3
	East Midlands	<1	13
	East of England	<1	14
	Greater London	2	1
	South East England	93	19
	South West England	2	9
Home nation	England	98	97
	Wales	1	1
	Rest of UK	-	<1
	Abroad	1	1

Base: All visitors – Bedgebury (236); All England (1,654)

Figure 4: Map of visitor origin for Bedgebury



4.3 Frequency of visits

4.3.1 First-time visitors

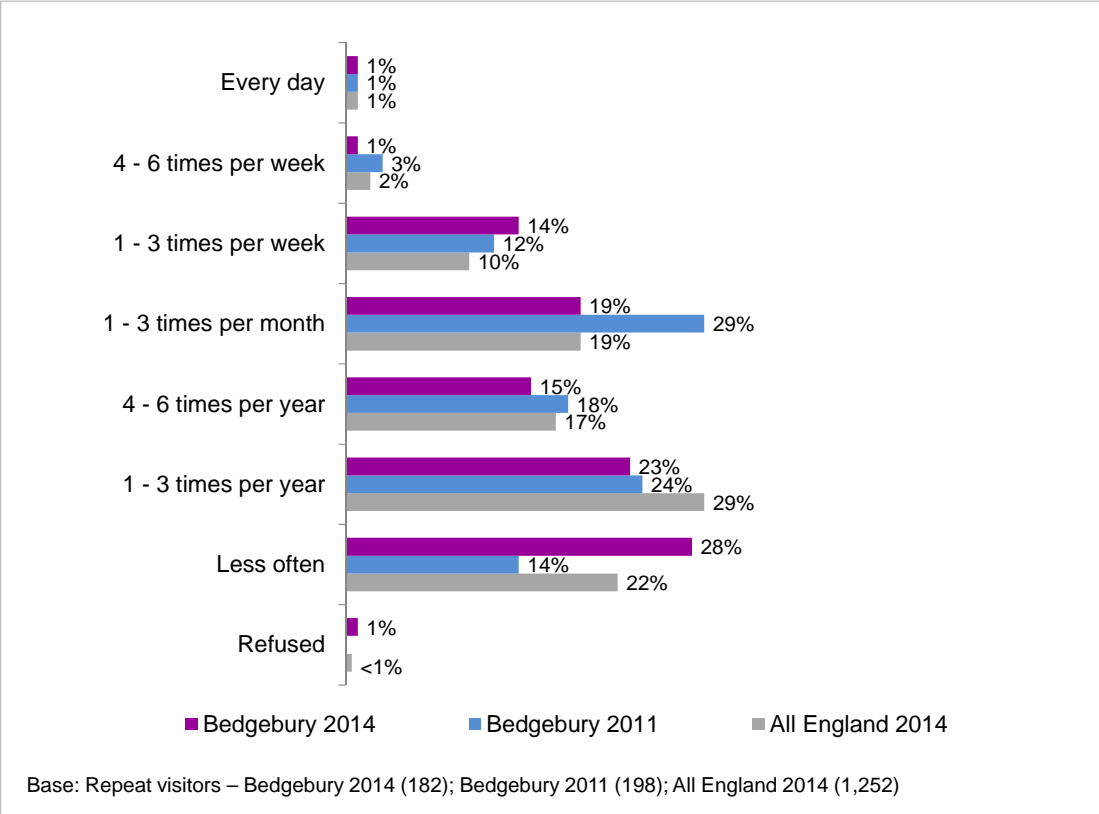
In 2014 almost a quarter of visitors to Bedgebury were first-time visitors (23%) which is in line with the all England site average of 24%, and unchanged since 2011. Over there quarters of visitors were therefore repeat visitors to Bedgebury (77%).

4.3.2 Repeat visitors

Focussing on the repeat visitors, most would be classified as infrequent visitors, visiting the site 4 – 6 times a year or less often (66%). Just over a third (34%) therefore visited the site monthly or more often.

This is in line with the all England average, although does represent a slight drop in frequency of visiting since 2011, when 45% visited at least monthly.

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



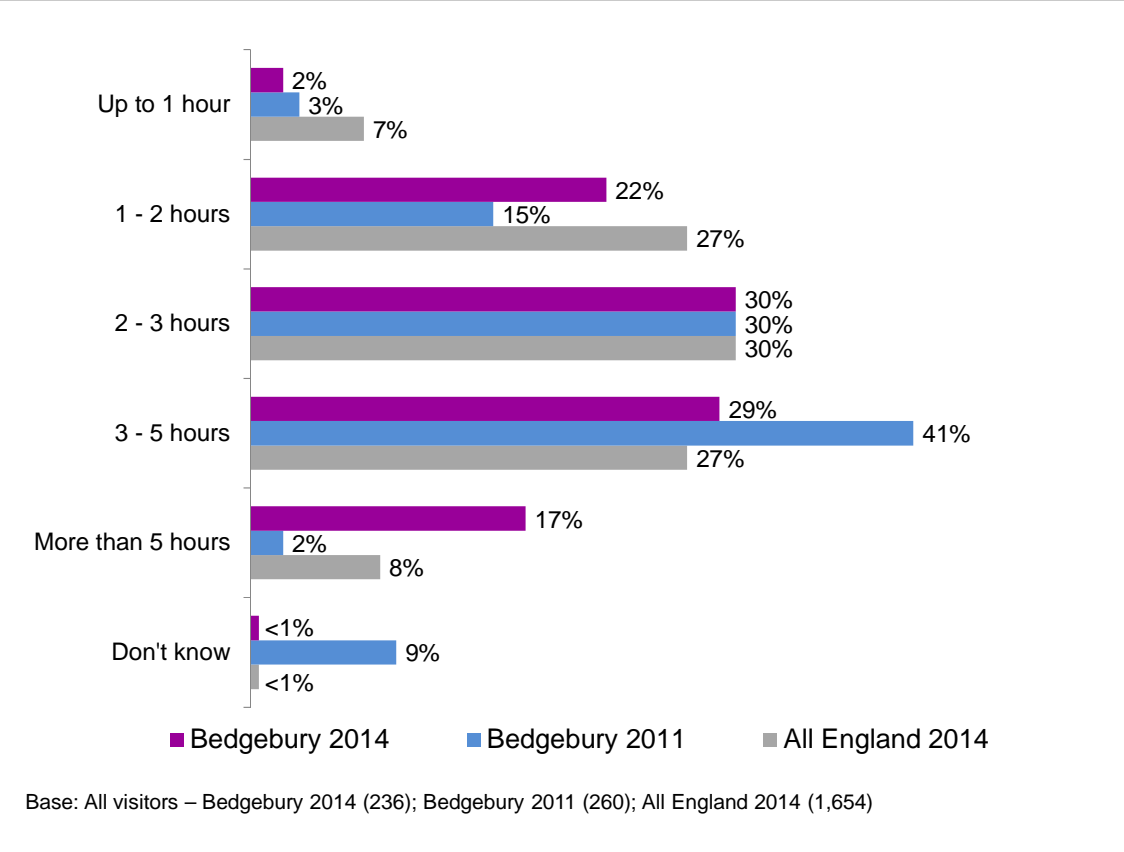
4.4 Length of visit

Visitors to Bedgebury were at the site an average of 18 minutes longer in 2014 than in 2011, spending 3 hours and 16 minutes on their visit on average. The average length of stay across all sites in England sites was somewhat shorter, at 2 hours and 48 minutes.

Figure 6 shows the individual lengths of time visitors spent at Bedgebury and shows that the longer average visit duration reported in 2014 has been as a result of significantly more visitors now saying they stayed for more than 5 hours than reported previously – up from 2% to 17%.

On the whole, the visit duration data follows a similar pattern to that seen across all England sites on average – see Figure 6 below:

Figure 6: Q5. 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.

By far the most popular activity at Bedgebury was walking generally (70%) which was very similar to the all England average (68%) and a considerable increase on 2011 when just 44% said they had taken part in walking activities on their visit.

Conversely, cycling was less popular in 2014 than 2011, with only 42% having taken part recently, compared with 60% in the previous survey. Across all England sites in 2014, 28% had taken part in cycling activities.

The café was very popular at Bedgebury, with 59% of visitors using it: up from 39% in 2011 and now in line with the all England average (58%).

The play area was used by 31% of visitors, a slight decrease since 2011 when 38% had used it.

The picnic and BBQ area remained popular for around a fifth of visitors (20%).

Go Ape! and the Gruffalo Trail were new features mentioned in the 2014 survey by 11% and 8% of visitors respectively.

Overall, the vast majority of visitors took part in 'active' activities (97%), which is a significant increase on 2011 (78%) and also slightly higher than the all England average (90%) - see Table 4 overleaf.

Table 4: Q4a/Q4b/Q4c. Activities taken / intend to take by all members of visitor group

	Bedgebury 2014 %	Bedgebury 2011 %	All England 2014 %
Cycling on forest roads, tracks or trails	25	54	17
Cycling off trails or tracks	24	18	18
TOTAL CYCLING	42	60	28
Walking on a sign-posted trail	41	32	47
Walking but not following sign-posts	28	13	17
Dog walking	16	11	16
TOTAL WALKING	70	44	68
Using the café / restaurant / other catering	59	39	58
Using the play area	31	38	28
Picnic or barbeque	20	18	16
Using the Visitor Centre / shop	14	8	11
Go Ape!	11	-	8
Admiring the views	10	19	12
Gruffalo Trail	8	-	5
Photography	7	5	4
Nature / natural history visit	2	2	2
Bird watching	2	1	4
Seeing something in the forest	2	2	5
Orienteering / Geocaching	1	1	1
Archery	1	-	<1
Organised event / trip	<1	2	1
Other	2	7	2
Taken part in ACTIVE activities	97	78	90

Base: All visitors – Bedgebury 2014 (236); Bedgebury 2011 (260); All England 2014 (1,654)

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

4.6 Length of time spent on activities

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

As previously mentioned, visits to Bedgebury lasted 3 hours and 16 minutes on average. Those walking spent an average of 1 hour and 46 minutes doing this; a small 6 minute decrease since 2011, when the average time walking was 1 hour and 52 minutes.

The average time spent cycling at Bedgebury in 2014 was slightly higher than the average walking time, at 2 hours and 2 minutes: again, a little shorter than 2011, when the average cycling duration was 2 hours and 17 minutes.

Table 5: Q5/Q6. Time spent taking part in walking at Bedgebury

	Total duration of visit		Time spent on any walking		Time spent on any cycling	
	2014 %	2011 %	2014 %	2011 %	2014 %	2011 %
Up to 30 minutes	<1	-	8	2	1	1
31 – 60 minutes	2	3	16	15	10	6
1 – 2 hours	22	15	45	43	42	37
2 – 3 hours	30	30	18	30	28	36
3 – 5 hours	29	41	10	8	12	18
5+ hours	17	2	1	-	-	-
Don't know	<1	9	2	2	7	1
AVERAGE	3 hrs 16 mins	2 hrs 58 mins	1 hr 46 mins	1 hr 52 mins	2 hrs 2 mins	2 hrs 17 mins

Base: All respondents - 2014 (236); 2011 (260), Respondents who walked - 2014 (136); 2011 (103), Respondents who cycled – 2014 (83); 2011 (144)

4.7 Money spent at the site and in the area as a result of the visit

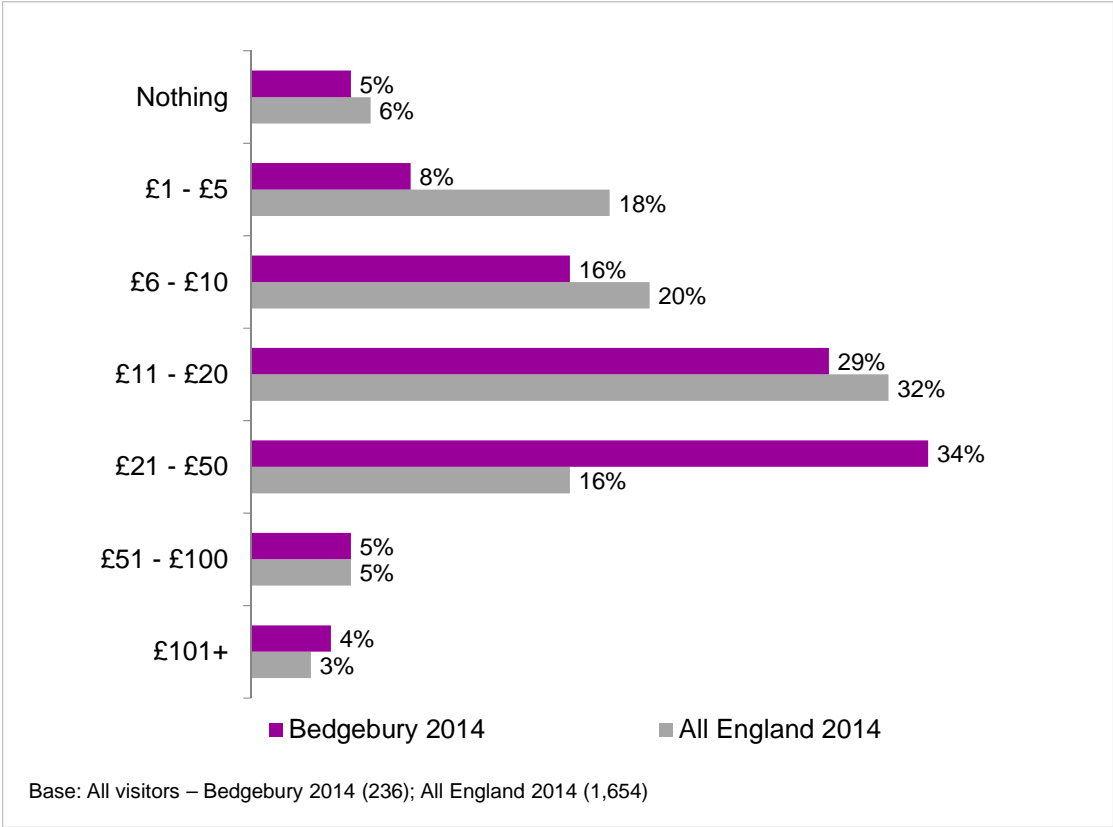
Visitors to Bedgebury were asked how much they intended to spend at the site during their visit on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. Figure 7 shows the figures calculated by combining the data across all types of intended spending. Please note that due to a change in the administering of this question, comparisons with 2011 spend was not possible.

Only a small proportion of the visitors interviewed (5%) said that they did not intend to spend any money at the site, which was in line with the all England average (6%).

Over two fifths of visitors (43%) planned to spend over £21 on their visit, which represents slightly higher spending than typically recorded, with less than a quarter (24%) spending over £21 on their visit across all England sites on average.

Overall, the average spend at Bedgebury was slightly higher than average at all England sites at £26.01 (compared with £20.81 all England).

Figure 7: Q18a. Average spend per person/group at site – frequency of spending within each price range



When looking at individual types of spending at the site, the item that the highest proportion of visitors to Bedgebury were likely to spend anything on was food and drink, with over four in five (83%) planning to spend on this. The average planned spend on food and drink was £10.40, a little more than the all England average of £8.48.

NB The spend data is based on all visitors, not just on those who said they would spend something. This allows an average spend across all visitors to be calculated. However, when not many visitors to a site plan to spend on something (particularly if that feature is not available at a site), the average spend shown can appear to be low/unusual, and comparisons to the all England data should be considered with this in mind.

Another area of spend at the site was parking; two thirds of visitors (67%) were likely to spend on parking, and an average spend of £7.24. This was again higher than the all England (£4.22).

Table 6a: Q18a. Average spend across individual items at the site (includes zero spend)

	% spending anything on items		Average spend on items £	
	Bedgebury %	All England %	Bedgebury £	All England £
Food and drink	83	74	£10.40	£8.48
Parking	67	75	£7.24	£4.22
Hiring equipment	7	4	£2.19	£1.60
Activities at the site	6	8	£2.56	£4.61
Souvenirs / gifts	2	5	£0.11	£0.55
Anything else	12	4	£3.74	£1.56

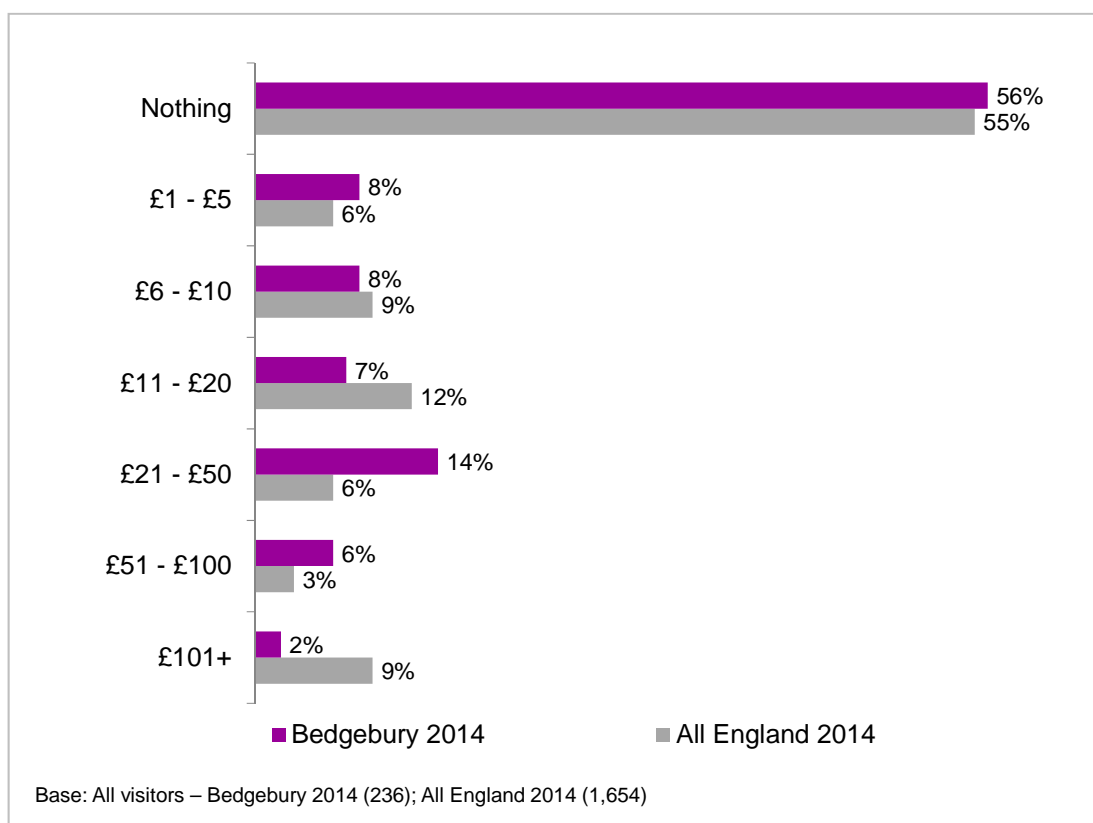
Base: All visitors – Bedgebury 2014 (236); All England 2014 (1,654)

Visitors to Bedgebury were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. Figure 8 show the figures calculated by combining the data across all types of spending. Again, 2011 comparisons have not been made due to changes in the administering of this question.

Over half of visitors to Bedgebury said that they would not be spending any money in the local area as a result of their trip (56%); this was a similar proportion to the all England average (55%).

The average intended spend in the area was £14.25, much lower than the all England sites average of £55.32.

Figure 8: Q18b. Average spend per person/group in local area



Looking at individual spend in the local area as a result of their visit to Bedgebury, transport, food and drink and parking were the main areas of intended spending: 38% planned to spend on transport (average of £5.11); 22% would spend on food and drink (average of £5.39) and 14% would spend on parking (average of £1.39).

Table 6b: Q18b. Average spend across individual items in the local area (includes zero spend)

	% spending anything on items		Average spend on items £	
	Bedgebury %	All England %	Bedgebury £	All England £
Transport	38	16	£5.11	£3.63
Food and drink	22	32	£5.39	£15.87
Parking	14	25	£1.39	£1.79
Accommodation	2	9	£1.49	£31.25
Admissions to other attractions	<1	3	£0.04	£1.44
Souvenirs / gifts	1	4	£0.15	£1.36
Hiring equipment	3	2	£0.45	£0.68
Anything else	1	1	£0.24	£0.34

Base: All visitors – Bedgebury 2014 (236); All England 2014 (1,654)

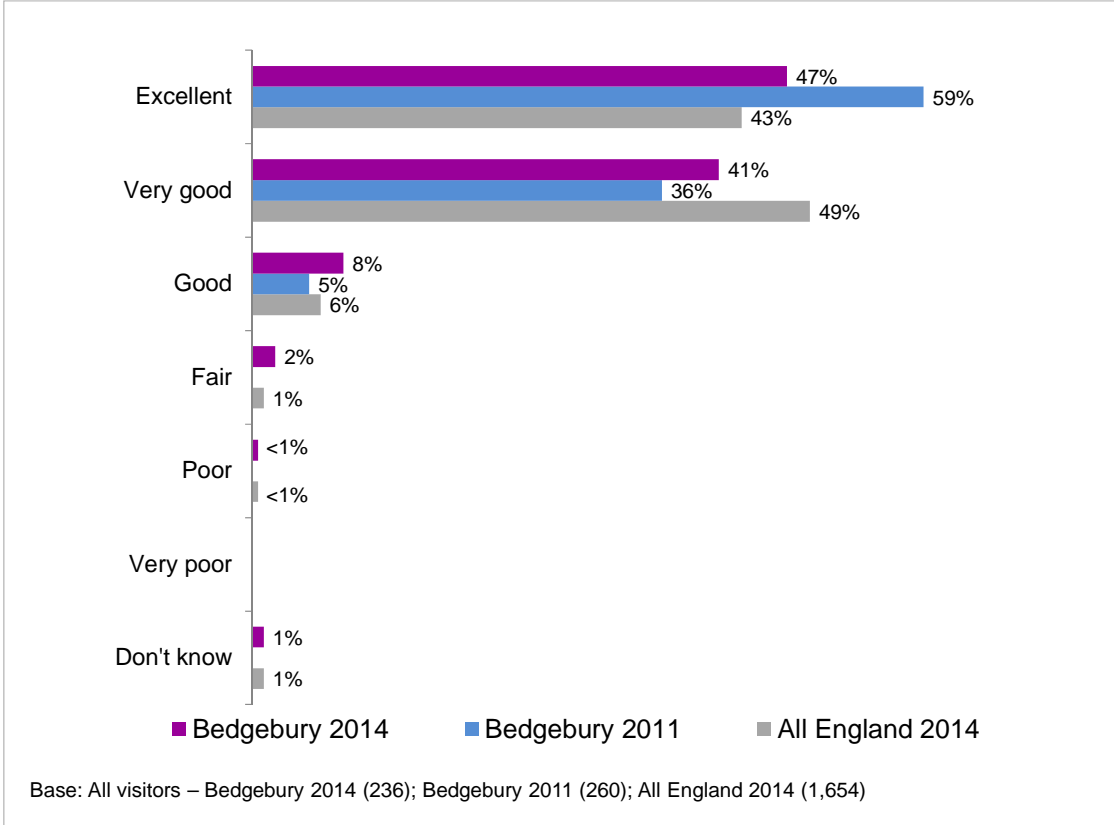
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Bedgebury as a place to visit were very positive. This was also true across all England sites and was found in the previous study conducted in 2011. Very few visitors interviewed at Bedgebury in 2014 gave a negative rating of the site, whilst almost half (47%) said it was excellent. This does, however, represent a drop in the excellent rating since 2011, when 59% said it was excellent.

Overall, 88% of visitors said Bedgebury was excellent or very good, and a further 8% said it was good: this is consistent with 2011 and in line with the all England average.

Figure 9: Q16. Rating of the site as a place to visit

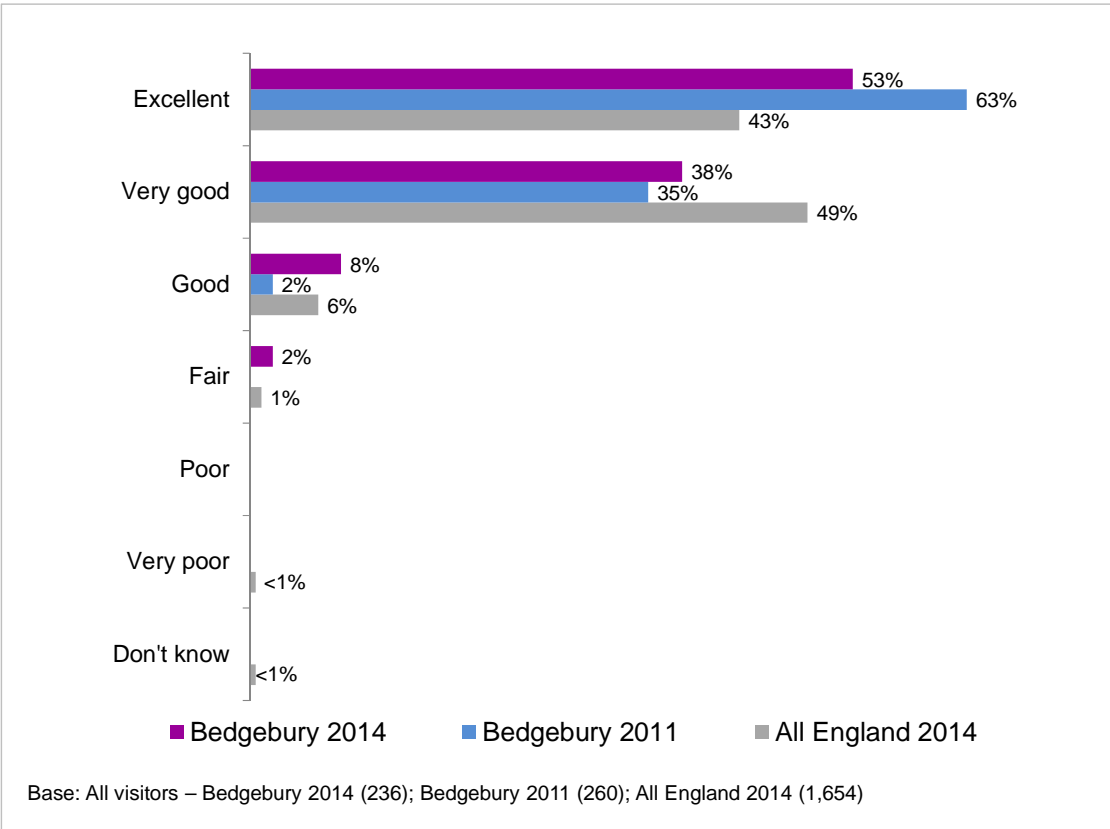


5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Bedgebury was seen to be were very positive. This was also found across all England sites on average, and in the 2011 survey.

Only a very small proportion of visitors interviewed at Bedgebury gave a less than positive rating of the site in terms of it being safe and welcoming (2%), whilst over half said it was excellent (53%). Although fewer visitors gave an excellent rating in 2014 compared to 2011 (63%), views were overall positive.

Figure 10: Q11. Rating of the site in terms of being safe and welcoming



Visitors were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the site. Table 7 overleaf details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Bedgebury and all England sites.

There was one main aspect of the site which stood which was the fresh air and open space (58%).

Other popular mentions included the scenery and beautiful views (28%), it being a good, safe place for the kids to run around and play (27%), peaceful, pleasant and tranquil (25%) and a safe environment for all people generally (17%).

Other comments made by less than one in ten visitors giving a positive rating are outlined in detail in Table 7 below:

Table 7: Q12. Reasons for giving a positive rating on how safe and welcoming the site feels – main mentions

	Bedgebury 2014 %	All England 2014 %
Fresh air / open space / plenty of space / freedom	58	37
The scenery / views / beautiful environment	28	43
Good, safe place for the kids to play / run around	27	29
Peaceful / pleasant / tranquil / relaxing / welcoming	25	32
Good provision of paths / trails and tracks	19	13
Safe environment generally for all people	17	31
Clean / tidy / well maintained / litter free	8	10
Good quality facilities / amenities	8	11
Well laid out / well organised / good set-up	6	12
Well signposted / good maps / info boards	5	7
Live locally / convenient / easy to get to / close	4	5
Friendly / helpful staff or rangers	3	4

Base: Visitors rating the site as excellent, very good or good – Bedgebury 2014 (232); All England 2014 (1,633)

Further comments made by one or two visitors included:

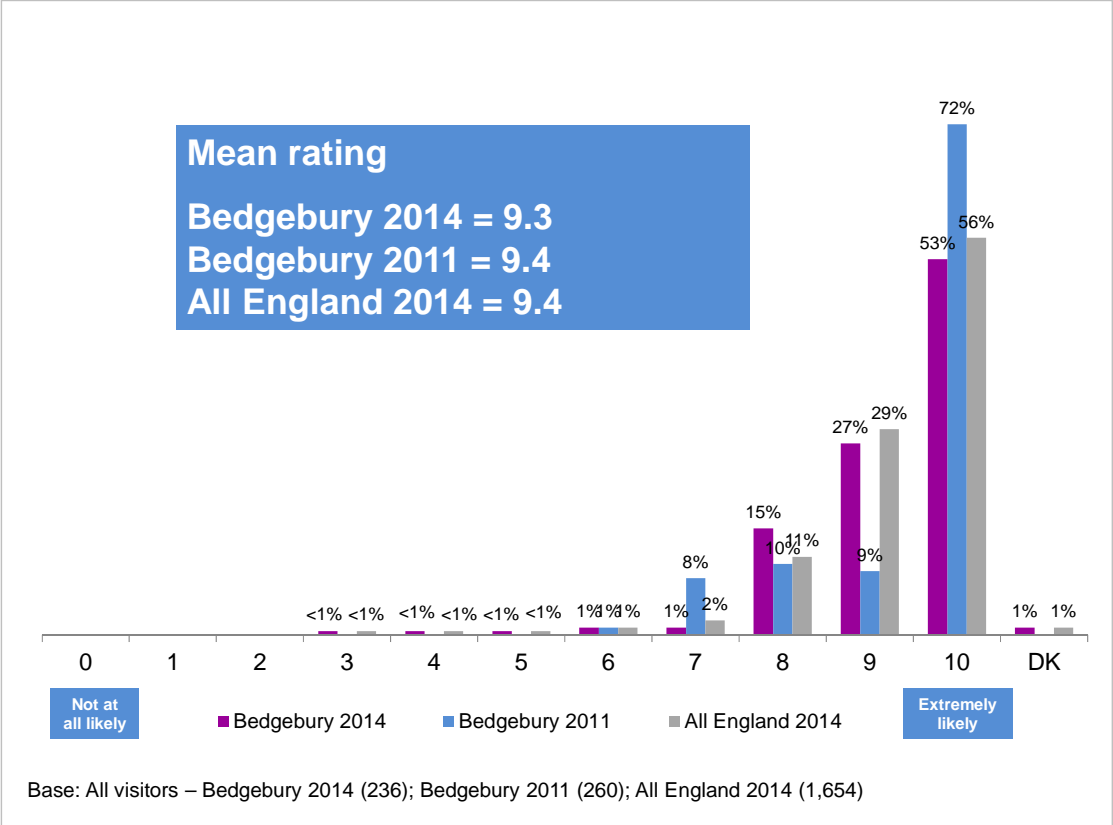
- Other visitors are friendly
- Go Ape!
- Dog friendly
- Away from the roads / no cars / cars drive slowly
- Good car parking.

5.3 Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Bedgebury 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 Bedgebury and all England sites generally were extremely positive: only 5% gave a rating of less than 8/10 for Bedgebury, and over half gave it full marks of 10 out of 10 (53%).

Somewhat more visitors gave the top rating back in 2011 (72%), however, overall the mean scores are very consistent at 9.3 in 2014 and 9.4 in 2011. Across all England sites on average, the mean rating was also 9.4.

Figure 11: Q17. Likelihood of recommending the site as a place to visit



These results can be further analysed by using a Net Promoter Score (NPS), which divides visitors 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 Bedgebury is 77, which is not dissimilar to the score of 80 reported in 2011, although a little lower than the all England score of 84.

5.4 Favourite things about the site

Visitors to Bedgebury 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 8 below.

No single aspect of Bedgebury stood out as favourite, with around a third of visitors enjoying the walks, paths and trails; the scenery and views or the cycle trails. A further quarter said their favourite aspect was the fresh air and being outside, the children's activities or the peace and tranquillity.

Table 8: Q8. Favourite things about the site – main mentions

Activities	Bedgb'ry 2014 %	Bedgb'ry 2011 %	All England 2014 %
Walks / paths / trails	33	24	39
Scenery / views / beautiful / natural	32	47	39
Cycle trails / freedom / opportunity to cycle	30	45	22
Fresh air / being outside	27	17	23
Activities that are good for the children	25	30	27
Peace / tranquillity / relaxation / atmosphere	23	45	36
Like forests / trees / variety of trees and plants	9	16	14
Exercise / keeping fit	6	11	9
Lots to see and do	6	12	6
Close to home / convenient location	6	15	13
Opportunity to spend time with family / friends	5	15	8
Good on-site facilities / BBQ areas / gift shop	5	10	10
Cost / value for money / free	5	2	2
Clean / well looked after	4	9	6
Ideal for dogs / dog friendly	3	-	2
Safe environment generally	3	23	11
Helpful / pleasant staff	3	-	2
Go Ape!	3	-	2

Base: All visitors – Bedgebury 2014 (236); Bedgebury 2011 (260); All England 2014 (1,654)

Some other favourite aspects of the site that were mentioned by one or two visitors included:

- Been before / wanted to come again
- Open space / plenty of space
- Good accessibility
- Play area
- Wildlife / bird watching
- The weather
- Plenty / good parking
- Well signposted / good maps / information boards
- Well laid out
- Waterways / rivers / creeks
- Remote / away from traffic / no cars
- Good fun
- Something different / a change.

There were a few differences observed between different sub-groups of the sample:

- Older visitors liked the scenery best (44% of 55+s), followed by the walks, paths and trails (41%).
- Younger visitors liked the cycle trails best (55% of 16-34s).
- The cycle trails were also more popular than average with adult only visitors (48%) and male visitors (38%).

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.

Almost two fifths of visitors to Bedgebury could not think of anything that would add to their enjoyment and only made positive comments (39%); this was a similar proportion to the all England average (44%).

Most suggestions to improve the site were therefore made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. However, the main improvement required was made by a fairly substantial 17% of visitors, and that was to improve the café.

A little over one in ten (11%) wanted better parking facilities (easier, cheaper, more spaces) or better toilet / changing facilities (also 11%).

Others asked for improved / more signage and maps (6%), more trails, paths and cycle tracks (6%) or longer, more challenging trails and tracks (4%).

Table 9: Q9. What would enhance enjoyment of site – main mentions

	Bedgebury 2014 %	All England 2014 %
Nothing / general positive comments	39	44
Improve café / catering	17	6
Better parking (easier, cheaper, more, free)	11	17
Improve toilets / more toilets / shower facilities / changing area	11	5
Improve signage / more maps / better maps	6	7
More trails, paths and cycle tracks	6	4
Longer, more challenging trail, paths and cycle routes	4	2
More picnic areas / BBQ / picnic tables and benches	3	2
More activities for children / more play areas	3	5
More seating	3	2
More dog poo bins / remove dog poo	2	6

Base: All visitors – Bedgebury 2014 (236); All England 2014 (1,654)

Other potential improvements not shown above as mentioned by one or two visitors only, included:

- Improve maintenance of paths, cycle tracks and trails
- More sheltered areas
- Better access for disabled people
- Cheaper café
- Have a cashpoint / accept card payments
- Drinking water taps
- More litter bins
- More sculptures / repair sculptures
- Easier, less challenging trails, paths and cycle routes
- Expand Go Ape! / more zip wires
- On-site pub
- More / larger cycle racks / bike wash
- Restricted access for dogs
- Bike hire / better bikes / bike child seats
- Bike shop / more shops.

When asked if there was anything that interfered with their enjoyment of their visit to Bedgebury over half reported that nothing had interfered with their enjoyment (55%): this was a little lower than the all England average of 66%.

Problems with the café were most often mentioned at 13% - whether poor service, inconvenient opening hours or long queues. Typically, only 3% reported problems with the café on average across all England sites.

Others visitors at Bedgebury found the poor weather, or the expensive parking had interfered with their enjoyment (both 6%), whilst a few said there were too many kids running round (4%).

Table 10: Q10. What interfered with enjoyment of site – main mentions

	Bedgebury 2014 %	All England 2014 %
Nothing	55	66
Poor service in the café / long queues / inconvenient opening hours	13	3
Wet / raining / windy (poor weather)	6	7
Car park expensive / should be free parking	6	9
Too busy / too many kids	4	1
Dogs off leads / running around / don't want dogs around	3	1
Signs unclear / need better signs / more maps	3	3
Problems with car parks (faulty machines, limited spaces)	3	2

Base: All visitors – Bedgebury 2014 (236); All England 2014 (1,654)

Other comments, not shown above as made by just one or two visitors included:

- Issues with toilets (not enough, closed, dirty etc.)
- Poor maintenance of the site (paths, fences, waterways)
- Too many cyclists / cyclists cutting-up walkers
- Need more litter bins / recycling bins / too much litter
- Dog mess on paths / in play area
- Need more seating
- No phone signal / Wi-Fi
- Problems getting around the site (trails closed, no disabled access)
- Some paths are difficult / dangerous (steep drops, loose shale, steep for kids)
- Not enough choice on the café menu / not enough food available
- Smell from the drains / toilets.

6. Site facilities

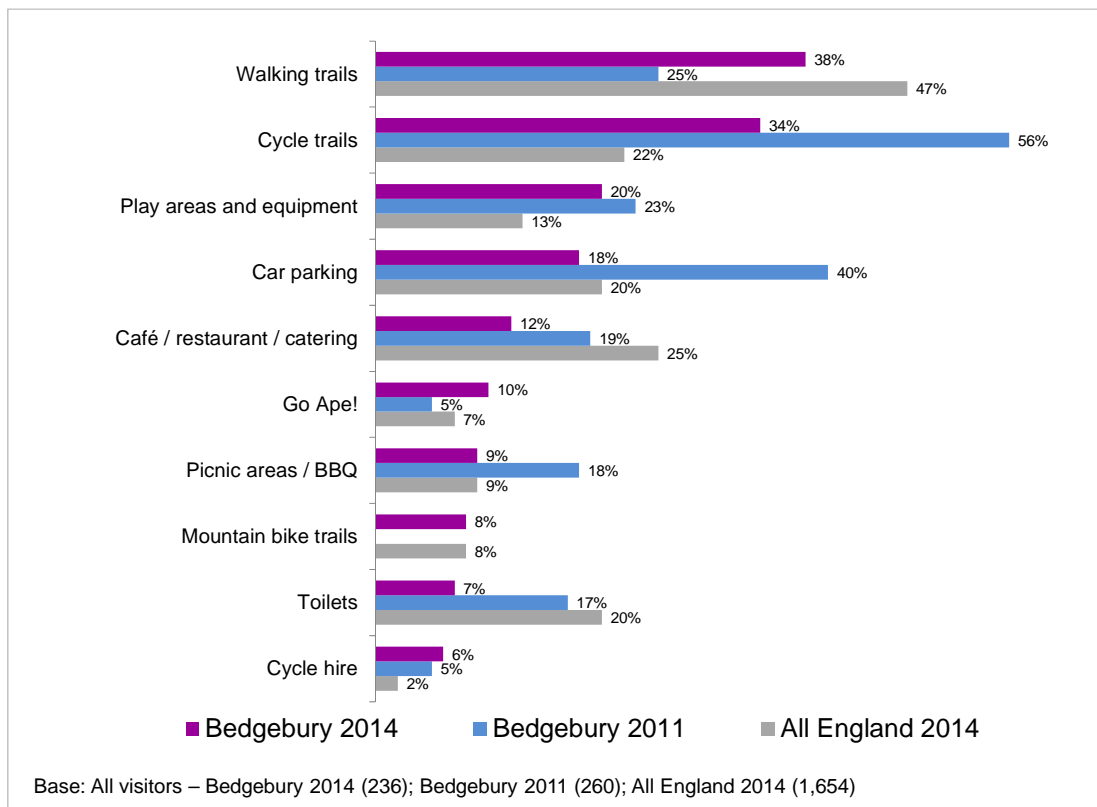
6.1 Importance of site facilities

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

Walking trails were mentioned by the highest proportion of visitors (38%); this figure was higher than in the 2011 survey (25%) but lower than the all England average (47%).

This was closely followed by cycle trails (34%), above the all England average of 22%, but lower than in 2011 when cycle trails were regarded as the most important influence on decision to visit (56%) – see Figure 12a below.

Figure 12a: Q13. Importance of different facilities in deciding to visit

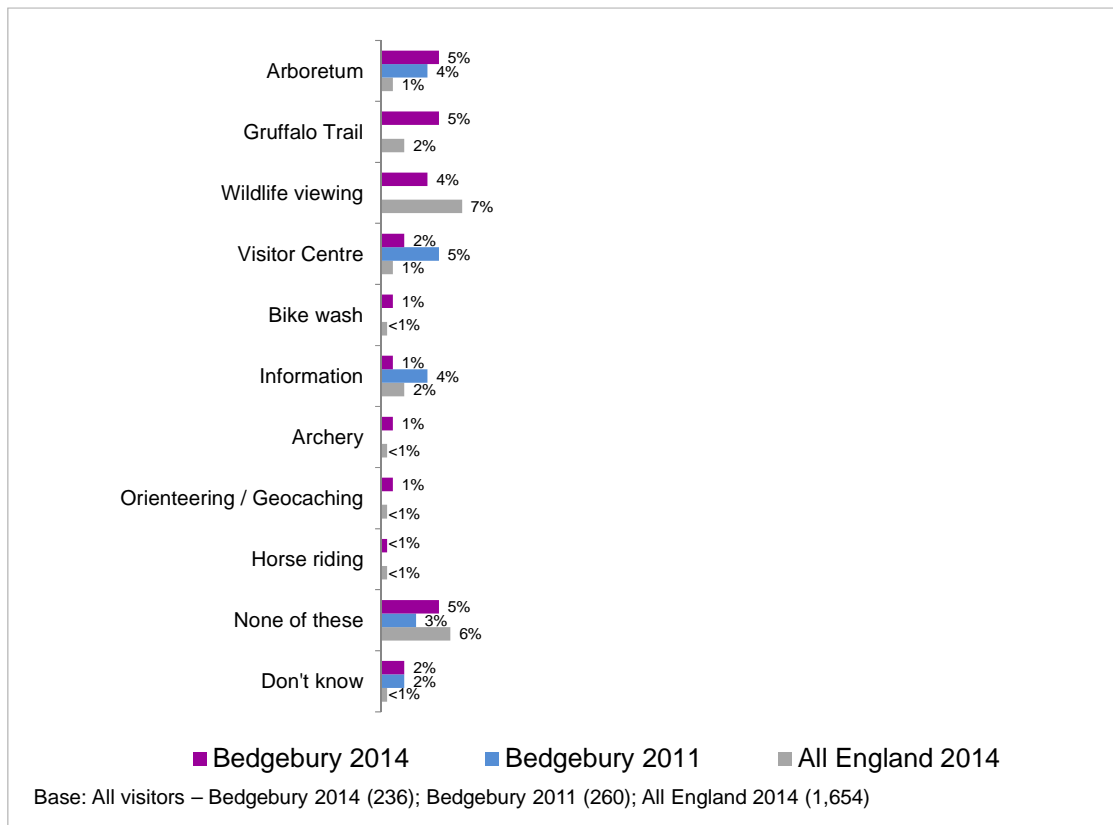


Beyond this, play areas and equipment (20%), car parking (18%) and café / restaurant / catering (12%) were most likely to influence the decision to visit, although all of these factors had decreased from 2011, particularly car parking (down from 40%).

The importance of picnic areas (9% from 18%) and toilets (7% from 17%) also recorded decreases compared with 2011. Conversely, Go Ape! increased in importance (10% from 5%) and new factors were cited as important for a small number of visitors – mountain bikes trails (8%), Gruffalo trail (5%) and wildlife viewing (4%).

Other facilities that were important to visitors' decision to visit the site are outlined in more detail in Figure 12b below:

Figure 12b: Q13. Importance of different facilities in deciding to visit the site - continued



Certain other factors (apart from site facilities) were important to around two in five visitors when choosing to come to the site (43%). The main one of these influencing visits was good weather / sunny / warm (22%): considerably higher than the all England average of 7%. For the remaining factors, only a relatively small proportion of visitors mentioned each one, and those mentioned by more than 2% of visitors are outlined below in Table 11:

Table 11: Q14. Others factors influencing visit to site – main mentions

	Bedgebury 2014 %	All England 2014 %
Nothing	57	74
Good weather / sunny / warm	22	7
Outdoors / fresh air / open spaces	6	2
Had some free time	3	1
Meeting / visiting with family and friends	3	2
Dog friendly / dogs can come off leads / dog facilities	3	1
Wanted to go walking / cycling	3	2
Good for the children / can run around and play	2	4
Birthday party	2	<1

Base: All visitors – Bedgebury 2014 (236); All England 2014 (1,654)

Other factors mentioned by one or two visitors included:

- Came for a nice day out
- Close to home / local / convenient
- Good value for money / cheap / free
- Beautiful scenery / views / natural beauty
- Good facilities
- Been before / wanted to come again
- Close to where I am staying (staying visitors)
- Something different / for a change.

6.2 Facilities used

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

The facilities used reflect to a certain extent visitors' views of the importance of facilities. Other than car parking (70%), the café / restaurant / catering (61%) and walking trails (55%) were used by the highest proportion of visitors.

The cycle trails were used by around a third of visitors (32%), higher than the proportion using the mountain bike trails (9%). Around a quarter of visitors made use of the play areas and equipment (26%) and the picnic areas / BBQ (25%).

Other facilities used by more than one in ten visitors were the visitor centre (15%) and the toilets (54%) – see Figure 13a and 13b overleaf for more details:

Figure 13a: Q15. Facilities used at Bedgebury 2014

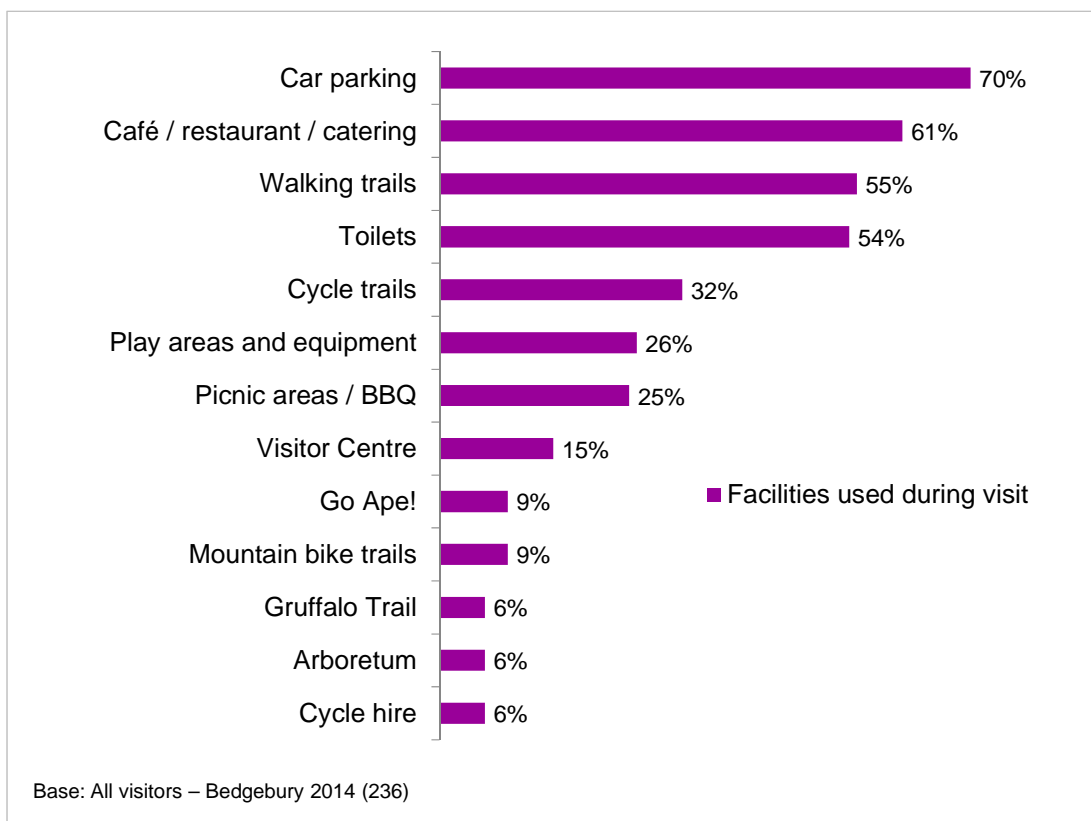
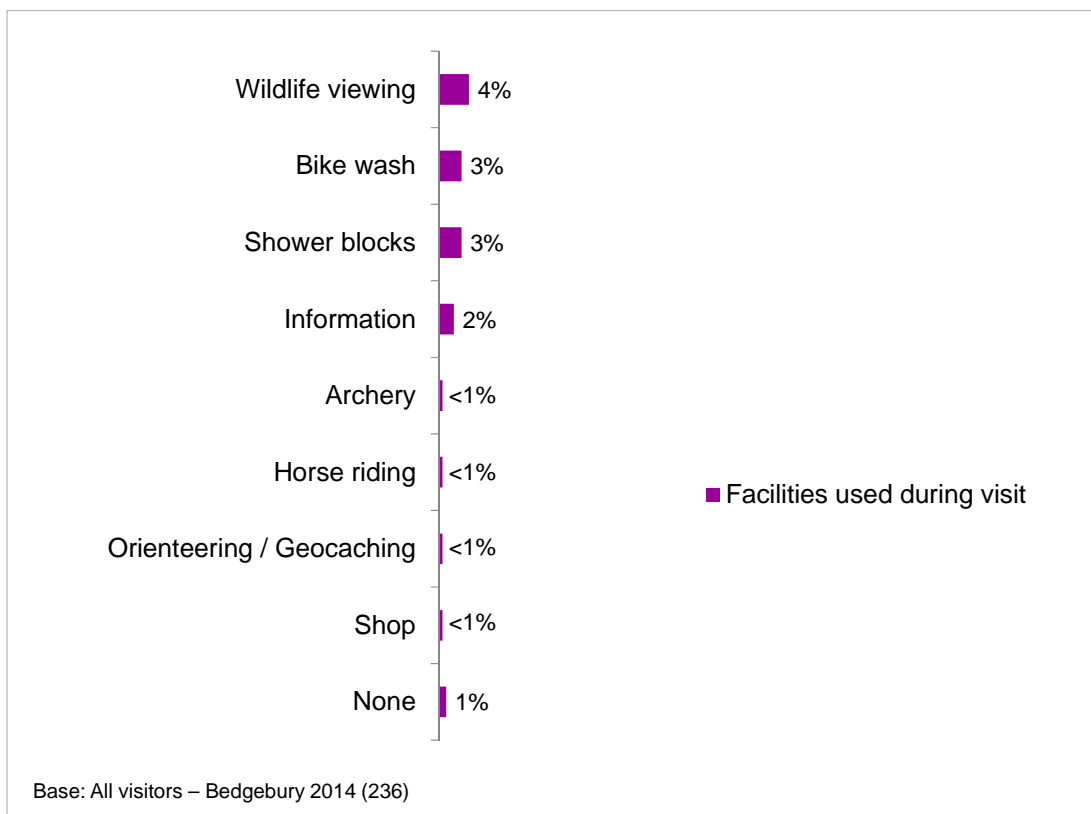


Figure 13b: Q15. Facilities used at Bedgebury 2014 - continued



6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by 30 or more visitors to Bedgebury have been detailed in Figure 14 below. Ratings of most of the facilities were extremely positive, with only small proportions giving any of these facilities a poor rating, and the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

Cycle trails received the highest score, with 44% rating this facility as excellent and nearly all of the remaining users rating it as very good (45%) or good (7%). Only 2% of those using this facility rated it as poor.

Ratings of walking trails were similarly positive, with 43% saying they were excellent: nobody rated the walking trails as poor.

As shown in Figure 14, a majority of users rated all other facilities positively, and very few (6% or less) gave negative ratings. The exception to this was café / restaurant / catering; whilst only 8% rated it as ‘poor’, a further 27% could only report a ‘fair’ rating, and only 9% said it was excellent.

Figure 14: Q15b. Rating of Bedgebury site facilities (where used) 2014 – main facilities used

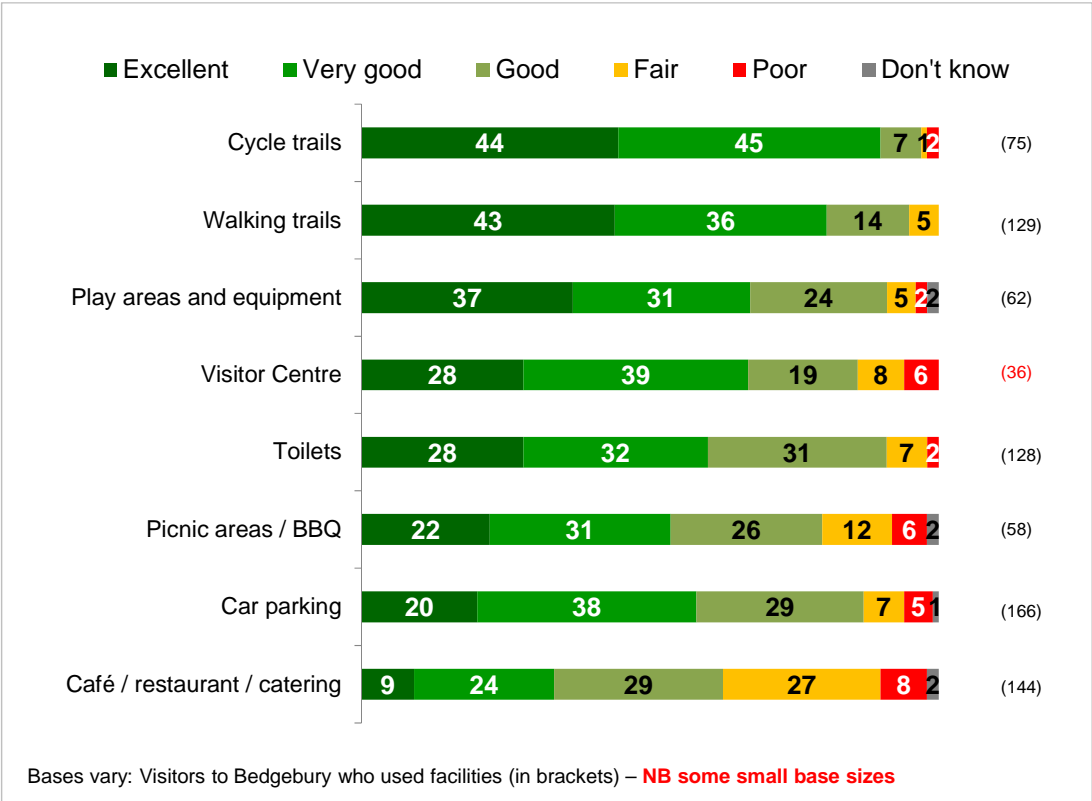


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2014 compared with 2011, where they were mentioned in the previous survey.

For most of the facilities listed, the proportion who gave an 'excellent' rating has decreased since the previous research, with the most significant decreases seen in the ratings of the car parking and the café (25 and 19 percentage point decreases respectively). The Visitor Centre was the only facility to see an increase in the proportion rating it as excellent and this was marginal (2 percentage point increase).

Table 12: Q15b – Proportions rating facilities at Bedgebury as 'Excellent' 2014 vs. 2011

Facilities	Bedgebury 2014 %	Bedgebury 2011 %	% point change
Cycle trails	44	54	-10
Walking trails	43	51	-8
Play areas and equipment	37	53	-16
Visitor Centre	28	26	+2
Toilets	28	30	-2
Picnic areas / BBQ	22	28	-6
Car parking	20	45	-25
Café / restaurant / catering	9	28	-19

Bases vary: visitors using each facility – NB some small bases

7. Information about sites

7.1 Sources used to plan visit

Visitors were asked where they found out about Bedgebury as a place to visit. This question was prompted and visitors could mention as many sources of information as were applicable – those given by more than 2% of visitors are outlined below.

Around half (49%) of visitors had always known about the site, whilst around two fifths (39%) had heard about it through word of mouth: this increases to over half of first time visitors (54%).

Around one in ten became aware of the site online, with 9% mentioning Google / other search engine and 2% mentioning other websites.

Table 13: Q7 – How found out about the site as a place to visit – main mentions

	Bedgebury 2014 %	Bedgebury 2011 %	All England 2014 %
Always known about it / been here before	49	49	62
Word of mouth	39	34	28
Google / other search engine	9	-	5
Other websites	2	13	2

Base: All visitors – Bedgebury 2014 (236); Bedgebury 2011 (260); All England 2014 (1,654)

There were several other sources of information used by small numbers of visitors in 2014. These included:

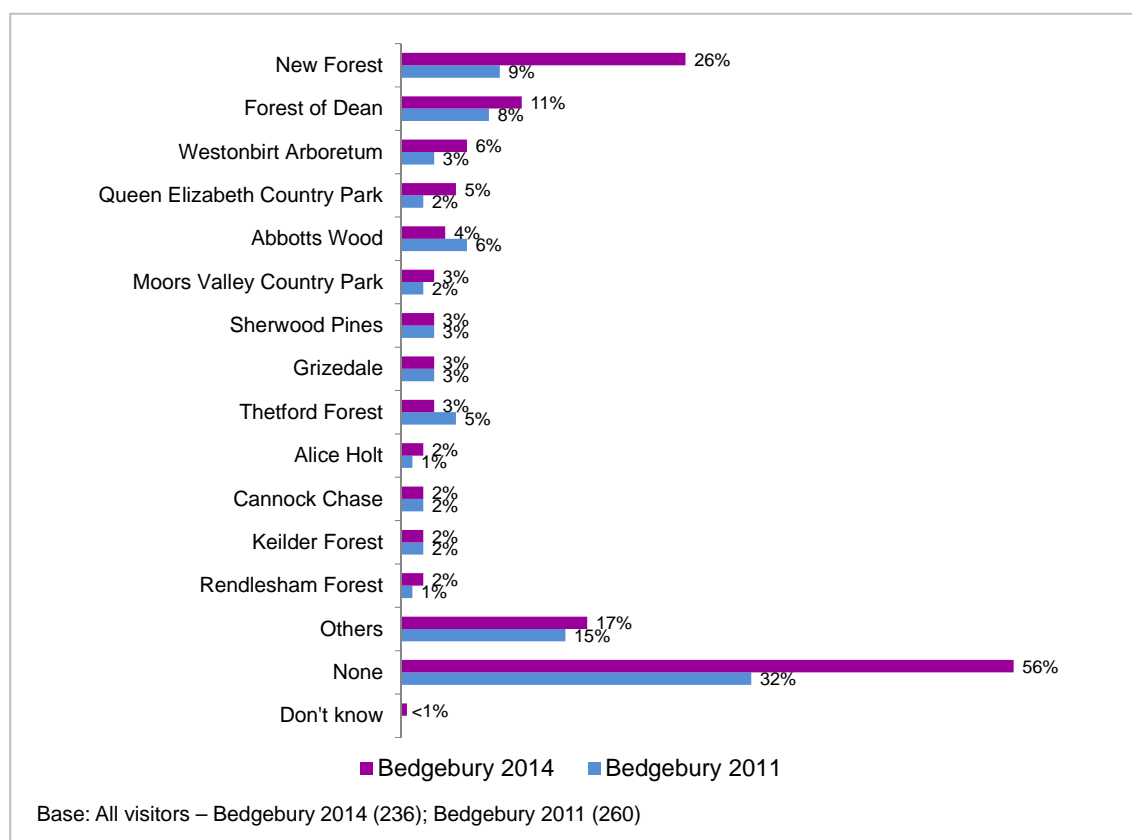
- Leaflet
- Forestry Commission website
- Smartphone app
- Facebook
- Newspaper
- Tourist Information Centres / Tourist Board
- Accommodation provider.

7.2 Visiting other sites

Visitors to Bedgebury 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. Just under half (44%) had visited at least one other site, although in 2011, 68% had visited another site.

New Forest was mentioned by the highest proportion of visitors to Bedgebury (26%). A further one in ten mentioned the Forest of Dean (11%), followed by Westonbirt Arboretum (6%) and Queen Elizabeth Country Park (5%). Less than one in twenty Bedgebury visitors had visited the remaining listed sites.

Figure 15: Other sites visited in the last 12 months



Other sites mentioned by small numbers (1%) of visitors included

- Cardinham Woods
- Dalby Forest
- Haldon Forest Park
- Jeskyns
- Whinlatter
- Bedgebury Forest
- West Walk.

8. Discovery passes

8.1 Uptake and interest in season tickets and annual Discovery Passes

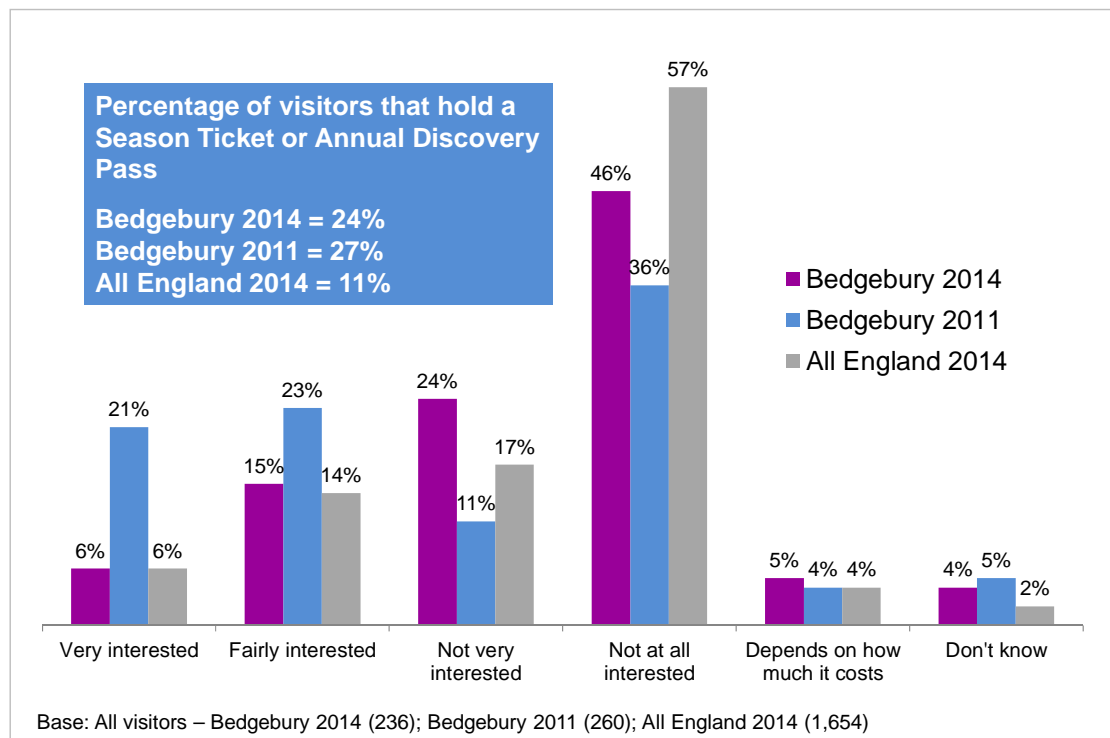
Around a quarter (24%) of visitors to Bedgebury held a season ticket or annual Discovery Pass; this was similar to the 2011 figure (27%) and considerably higher than the all England average (11%).

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).

Levels of interest amongst visitors to Bedgebury on purchasing an Annual Discovery Pass were relatively low, with 21% saying they were interested (6% very interested and 15% fairly interested). This was considerably lower than the proportion of visitors who were interested in a pass back in 2011 (44%). Across all England sites, levels of interest in purchasing a pass were around the same as current interest levels in Bedgebury; with one in five (20%) saying they were interested in buying one.


Most of the visitors interviewed were therefore not interested in purchasing an Annual Discovery Pass (70%) which was also true across all England sites in 2014 (74%).

Figure 16: Current usage and levels of interest in season tickets and annual Discovery Passes



Appendix I

Questionnaire

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

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 S2 AND S3 IN WALES ONLY – CHANGE TO WELSH VERSION WHERE REQUIRED

S2 Do you speak Welsh? **IF YES** Is that.....?

- Yes – fluently
- Yes – but not fluently
- No

(7)
1
2
3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

S3 We can conduct this interview in English or in Welsh - which would you prefer?

- English
- Welsh

(8)
1
2

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

(17)

1
2
3
4
5

SHOWCARD B

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

First visit

Every day
4-6 times a week
1-3 times a week
1-3 times a month
4-6 times a year
1-3 times a year
Less often
Don't know

(18)

1

2
3
4
5
6
7
8
9

ASK ALL

SHOWCARD C

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

PROBE - Any others?

RECORD IN FIRST COLUMN IN GRID BELOW - 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? **PROBE** - Any others?

RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED

ASK ALL

SHOWCARD C AGAIN

Q4c 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? **PROBE** - Any others?

RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED

		(20-23m)	(28-31m)	(36-39m)
		Q4a Personally taken part in	Q4b Others in group taken part in	Q4c Personally / other PLANNING to take part in
A	Cycling on forest roads, tracks or trails	1	1	1
B	Cycling / mountain biking off trails or tracks	2	2	2
C	Dog walking	3	3	3
D	Walking on a sign-posted trail	4	4	4
E	Walking but not following sign posts	5	5	5
F	Orienteering / Geocaching	6	6	6
G	Running / jogging	7	7	7
H	Horse riding / pony trekking	8	8	8
I	Using the café / restaurant / other catering	9	9	9
J	Using the Visitor Centre / shop	A	A	A
K	Using the play area	B	B	B
L	Nature / natural history visit	C	C	C
M	Bird watching	D	D	D
N	Photography	E	E	E
O	Picnic or barbeque	F	F	F
P	Camping	G	G	G
Q	Go Ape!	H	H	H
R	Seeing something in the forest	I	I	I
S	Organised event / trip	J	J	J
T	Admiring the views	K	K	K
U	A forest drive	L	L	L
		(24-27m)	(32-35m)	(40-43m)
	OTHERS			
	None of these	M	M	M

ASK ALL

SHOWCARD D

Q5 Approximately how long have you spent here today in total?
SINGLE CODE

- 0 - 15 minutes
- 16 - 30 minutes
- 31 - 60 minutes
- 1 - 2 hours
- 2 - 3 hours
- 3 - 5 hours
- 5+ hours

Don't know

(45)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8

INSTRUCTIONS:

Q6 IS ASKED OF PHYSICAL ACTIVITIES THAT THE RESPONDENT HAS PERSONALLY TAKEN PART IN AT Q4a – OTHERWISE GO TO Q7

- ASK ABOUT TIME SPENT CYCLING IF CODED **1 OR 2 AT Q4a**
- ASK ABOUT TIME SPENT WALKING IF CODED **3, 4 OR 5 AT Q4a**
- ORIENTEERING, RUNNING AND HORSE RIDING – CHECK IF CODED **6, 7 OR 8 AT Q4a**

SHOWCARD D AGAIN

Q6 And approximately how long have you spent here today.....?
SINGLE CODE

	(46)	(47)	(48)	(49)	(50)
TIME SPENT	<u>RESPONDENT</u> CYCLING FROM Q4a	<u>RESPONDENT</u> WALKING FROM Q4a	<u>RESPONDENT</u> ORIENTEERING / GEOCACHING FROM Q4a	<u>RESPONDENT</u> RUNNING / JOGGING FROM Q4a	<u>RESPONDENT</u> HORSE RIDING / PONY TREKKING FROM Q4a
0 - 15 minutes	1	1	1	1	1
16 - 30 minutes	2	2	2	2	2
31 - 60 minutes	3	3	3	3	3
1 – 2 hours	4	4	4	4	4
2 – 3 hours	5	5	5	5	5
3 – 5 hours	6	6	6	6	6
5+ hours	7	7	7	7	7
Don't know	8	8	8	8	8

ASK ALL

SHOWCARD E

<p>Q7 How or where did you find out about this site as a place to visit? CODE ALL MENTIONED</p>	<p>(55-58m)</p>
<p>Always known about it / been here before Word of mouth Newspaper Leaflet ----- Tourist Information Centre</p>	<p>1 2 3 4 5</p>
<p>Road signs Just passing / en route Map Smartphone app ----- Facebook</p>	<p>6 7 8 9 A</p>
<p>----- Twitter Forestry Commission website Natural Resources Wales website Google / other search engine Other website (please specify) _____</p>	<p>B C D E X</p>
<p>----- Other (please specify) _____ Don't know / can't remember</p>	<p>(59-62m) X M</p>
<p>Q8 What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED</p>	<p>(63-66m)</p>
<p>Peace / tranquillity / relaxation Scenery / views / beautiful Walks / paths / trails ----- Cycle trails / freedom / opportunity to cycle</p>	<p>1 2 3 4</p>
<p>----- Wildlife / bird watching Fresh air / being outside Exercise / keeping fit ----- Activities that are good for the children</p>	<p>5 6 7 8</p>
<p>----- Close to home / convenient Opportunity to spend time with family / friends Safe environment ----- Lots to see and / or do</p>	<p>9 A B C</p>
<p>----- Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after ----- The weather</p>	<p>D E F G</p>
<p>----- Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money -----</p>	<p>H I J K</p>
<p>Other (please specify) ----- ----- Nothing Don't know</p>	<p>(67-70m) L M</p>

ASK ALL

Q9 What, if anything, would enhance your enjoyment of this site? (75-78m)
PROBE Anything else?
DO NOT PROMPT – CODE ALL MENTIONED
IF MENTIONS WEATHER, PROBE FOR MORE DETAILS

- Better parking (easier, more, cheaper, free) 1
- Improve toilets / more toilets / shower facilities / changing area 2
- More activities for children / more play areas 3
- More trails / paths / cycle tracks 4
- Improve signage / more maps / better maps 5
- Improve café / catering 6
- More dog poo bins / remove dog poo 7
- More bins / litter bins / recycling bins 8
- Longer / more challenging trails, paths and cycle routes 9
- More seating A
- More picnic areas / BBQ / picnic tables and benches B
- Improve maintenance of paths / cycle tracks / better surfacing C

Other (please specify) (79-82m)

- Nothing L
- Don't know M

Q10 What, if anything, interfered with your enjoyment of this site today? (83-86m)
PROBE Anything else?
DO NOT PROMPT – CODE ALL MENTIONED
IF MENTIONS WEATHER, PROBE FOR MORE DETAILS

- Wet / raining / windy (poor weather) 1
- Car parking expensive 2
- Signs unclear / need better signs / more maps 3
- Problems with car parks 4
- Poor service in café / long queues / inconvenient opening hours 5
- Too busy 6
- Dogs off leads / loose dogs / don't want dogs around 7
- Toilets – not enough / closed / out of order 8
- Need more litter bins / recycling bins / too much litter 9
- Dog mess on paths / in play areas A

Other (please specify) (87-90m)

- Nothing L
- Don't know M

ASK ALL

SHOWCARD F

Q11 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

(95)

1 }
2 } **Q12**
3 }
4 }
5 }
6 }
7 → **Q13**

ASK Q12 IF CODED 1-6 AT Q11

Q12 What are the reasons for your rating? **PROBE** Anything else?
DO NOT PROMPT – CODE ALL MENTIONED

- The scenery / views / beautiful environment
- Peaceful / pleasant / tranquil / relaxing
- Fresh air / open space
- Safe environment generally
- Good, safe place for the kids to play and run around
- Clean / tidy / well maintained / litter free
- Well signposted / good maps / info boards
- Well laid out / well organised / good set up
- Other visitors here are friendly
- Good quality facilities or amenities
- Good provision of paths, trails and tracks
- Friendly / helpful staff or rangers
- Live locally / convenient / easy to get to

(96-99m)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A
- B
- C
- D

Other (please specify)

(100-103m)

Don't know

M

BEDGEBURY

ASK ALL

SHOWCARD G8

Q13 Looking at this card, which of these aspects **of the site** were important to your decision to visit today? **PROBE** Any others?

CODE ALL MENTIONED

		(105-108m)
A	Arboretum	2
B	Archery	3
C	Bike wash	4
D	Café / restaurant / catering	6
E	Car parking	7
F	Cycle hire	9
G	Cycle trails	A
H	Go Ape!	H
I	Horse riding	K
J	Information available / interpretation	M
K	Mountain bike trails	O
		(109-112m)
L	Orienteering / Geocaching	3
M	Picnic areas / BBQ	5
N	Play areas and equipment	7
O	Toilets	B
P	Visitor Centre	E
Q	Walking trails	F
R	Wildlife viewing	G

Other (please specify)

None of these
Don't know

(113-116m)

M
N

Q14 Can you tell me about anything else that might have influenced your decision to visit here today, other than the site facilities you have just mentioned?

PROBE Anything else?
RECORD VERBATIM

(117-120m)

(121-124m)

Nothing
Don't know

M
N

BEDGEBURY

ASK ALL

SHOWCARD G8 AGAIN

Q15a Which aspects of the site have you used during your visit today? **PROBE** Any others?
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....?
 FOU: (140-231 FOR Q15)

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	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
		CIRCLE IF USED	Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(125-128m)								
A	Arboretum	2	1	2	3	4	5	6	7	(141)
B	Archery	3	1	2	3	4	5	6	7	(142)
C	Bike wash	4	1	2	3	4	5	6	7	(143)
D	Café / restaurant / catering	6	1	2	3	4	5	6	7	(145)
E	Car parking	7	1	2	3	4	5	6	7	(146)
F	Cycle hire	9	1	2	3	4	5	6	7	(148)
G	Cycle trails	A	1	2	3	4	5	6	7	(149)
H	Go Ape!	H	1	2	3	4	5	6	7	(156)
I	Horse riding	K	1	2	3	4	5	6	7	(159)
J	Information available / interpretation	M	1	2	3	4	5	6	7	(160)
K	Mountain bike trails	O	1	2	3	4	5	6	7	(162)
		(129-132m)								
L	Orienteering / Geocaching	3	1	2	3	4	5	6	7	(165)
M	Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
N	Play areas and equipment	7	1	2	3	4	5	6	7	(169)
O	Toilets	B	1	2	3	4	5	6	7	(173)
P	Visitor Centre	E	1	2	3	4	5	6	7	(176)
Q	Walking trails	F	1	2	3	4	5	6	7	(177)
R	Wildlife viewing	G	1	2	3	4	5	6	7	(178)
		(133-136m)								
OTHERS (WRITE IN)			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()

None of these
 Don't know

M
 N

ASK ALL

SHOWCARD H AGAIN

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

(235)

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

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

Don't know / not sure

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
---	---	---	---	---	---	---	---	---	---	----

(236)

SHOWCARD I

Q18a Thinking about your visit to this site today, how much are you (and your group) likely to spend here on the following things?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
 IF NONE RECORD 0. IF DON'T KNOW, RECORD AAAA**

- Food and drink _____
- Activities available at this site _____
- Parking _____
- Souvenirs / gifts _____
- Hiring equipment such as boats, bikes or horses _____
- Anything else _____

- (237-240)
- (241-244)
- (245-248)
- (249-252)
- (253-256)
- (257-260)

SHOWCARD J

Q18b And more generally, how much are you (and your group) likely to spend during your visit to this local area on the following things?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
 IF NONE RECORD 0. IF DON'T KNOW, RECORD AAAA**

- Food and drink _____
- Accommodation (if staying overnight) _____
- Admission to other attractions _____
- Parking _____
- Transport, including public transport, taxis and petrol _____
- Souvenirs / gifts _____
- Hiring equipment such as boats, bikes or horses _____
- Anything else _____

- (261-264)
- (265-268)
- (269-272)
- (273-276)
- (277-280)
- (281-284)
- (285-288)
- (289-292)

SHOWCARD K (E) AND GREEN ENGLAND MAP

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

CODE ALL MENTIONED

(300-303m)

Alice Holt Forest	1
Abbotts Wood	2
Bedgebury Forest and Pinetum	3
Cannock Chase	4
Cardingham 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

(304-307m)

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
Wharnccliffe	C
Whinlatter	D
Wyre Forest	E
Other woodland / forest in England	F
Other woodland / forest in Wales	G
None of these	H
Don't know / can't remember	I

Q20a Do you currently hold an annual Discovery Pass or Friends membership for this site?	(330)
Yes	1
No	2
Don't know / can't remember	3

SHOWCARD L

Q20b 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? SINGLE CODE	(331)
Very interested	1
Fairly interested	2
Not very interested	3
Not at all interested	4
Depends on how much it costs – DO NOT PROMPT WITH THIS CODE	5
Don't know	6

ASK ALL

READ OUT – Finally, I'd like to ask some questions to help with our analysis.

Q21 INTERVIEWER RECORD GENDER

- Male
- Female

(415)
1
2

Q22 Which of the following age bands do you fall into?

- 16-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65+ years

Refused

(416)
1
2
3
4
5
6
7

SHOWCARD M

Q23 Which of these best describes your employment status right now?
SINGLE CODE

- Employee in full time job (30 hours plus a week)
- Employee in part time job (under 30 hours per week)
- Self-employed full or part time
- On a government supported training programme
- Full time education at school, college or university
- Unemployed and available for work
- Permanently sick / disabled
- Wholly retired from work
- Looking after the home
- Other (please specify) _____

Refused

(417)
1
2
3
4
5
6
7
8
9
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.)

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

Job title _____

Position / Grade _____

- AB
- C1
- C2
- DE

Refused

(418)
1
2
3
4
5

Q25	Do you have any children aged 15 or under living in your household?	(420)
	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	(421)
	Yes – limited a lot	1
	Yes – limited a little	2
	No	3
	Refused	4
SHOWCARD N		
Q27	Which of these best describes your ethnic origin? SINGLE CODE	(422)
	White British	1
	White Welsh	2
	White Irish	3
	White East European	4
	White other European	5
	Any other White background	6
	Caribbean	7
	African	8
	Any other Black background	9
	Indian	A
	Pakistani	B
	Bangladeshi	C
	Any other Asian background	D
	White and Black Caribbean	E
	White and Black African	F
	White and Asian	G
	Any other Mixed background	H
	Chinese	I
	Other (please specify) _____	J
	Refused	Z

ASK Q28a AT ENGLAND SITES ONLY

SHOWCARD O (E) AND PURPLE ENGLAND MAP

Q28a Which of the following regions do you live in?
SINGLE CODE

- North East England
- Yorkshire & Humberside
- North West England
- West Midlands
- East Midlands
- East of England
- Greater London
- South East England
- South West England

- Wales
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(425)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A
- B
- C
- D
- X
- Z

ASK Q28b AT WALES SITES ONLY

SHOWCARD O (W) AND WALES MAP

Q28b Which of the following regions do you live in? **(WALES)**
SINGLE CODE

- North Wales
- Mid / West Wales
- South West Wales
- Valleys
- South East Wales

- England
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(426)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- X
- Z

Q29 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 . LEADING PART OF POSTCODE IS MOST IMPORTANT

(427)	(428)	(429)	(430)	(431)	(432)	(433)

Respondent Name:					
Address:					
Telephone number:					
THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.					
<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:	
				(435)(436)(437)(438)	
WRITE IN YOUR INTERVIEWER NUMBER →				(439)	(440)
				(441)	(442)
B01326-2	F.O.U (BACK CHECKS)		Accompanied	Yes 1 No 2	Supervisor signature

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.

enquiries@beaufortresearch.co.uk
www.beaufortresearch.co.uk