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Research Report

Quality of the Visitor
Experience 2015

Dalby Forest



Prepared for:
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Forestry Commission England

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1. Executive summary

1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research conducted 8,417 interviews with visitors to forest and woodland sites across England and Wales. In 2015, a total of 2,950 interviews were conducted: 1,762 in England and 1,188 in Wales.

A total of 42 sites were 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 2015, 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 259 visitor interviews conducted at Dalby Forest in 2015. Throughout the report, comparisons have been made to the previous research conducted in 2012, and the all England average (aggregated data from all 7 sites surveyed in 2015).

1.2 Dalby Forest

Dalby Forest is situated on the southern slopes of the North York Moors National Park. The southern part of the forest is divided by a number of valleys creating a 'Rigg and Dale' landscape whilst to the north the forest sits on the upland plateau.

The site provides outdoor recreation for all ages with a range of facilities and activities, including cycling, walking, adventure play and Go Ape!. Dalby Forest is also the site for many concerts.

1.3 Perceptions of the site

Perceptions of Dalby as a place to visit were very positive. Very few visitors interviewed at Dalby in 2015 gave a negative rating of the site, whilst over three quarters of visitors (77%) said it was excellent or very good. However, there was a significant drop in the proportion rating the site as excellent since 2012, when 50% said it was excellent compared to 22% in 2015. The excellent rating for Dalby was also lower than the all England average of 32%.

Similarly, ratings of how safe and welcoming Dalby was seen to be were very positive. Only a very small proportion of visitors interviewed at Dalby gave a less than positive rating of the site in terms of it being safe and welcoming (2%), whilst almost two fifths said it was excellent (39%). The ratings were very similar to the ratings given in 2012 and the all England average.

When asked whether they would be likely to recommend Dalby as a place to visit to a friend or relative (using a score of 0-10), scores for Dalby and all England sites generally were extremely positive: only 10% gave a rating of less than 7/10 for Dalby, and almost two fifths gave the site 10 out of 10 (38%). Significantly more visitors gave the top rating back in 2012 (61%), which is reflected in the overall mean scores for the site. Dalby's average rating in 2012 was 9.3 but in 2015 it was 8.57. This average was also lower than the all England average of 9.14; however, the ratings were still high for Dalby.

1.4 Strengths of the site

No single aspect of Dalby stood out as favourite, with around a third of visitors enjoying the scenery and views (30%), while around a quarter of visitors enjoyed the walks / paths / trails (25%), fresh air / being outside (23%) or the cycle trails (22%). A further fifth said their favourite aspect was the children's activities (20%), peace / tranquillity / relaxing atmosphere or the fact that it was clean / well looked after (19% for each).

1.5 Areas for improvement

Two fifths of visitors to Dalby could not think of anything that would add to their enjoyment and only made positive comments (40%); this was a similar proportion to the all England average (45%).

Most suggestions to improve the site were therefore made by relatively small numbers of visitors. However, the main improvement required was made by almost one in ten visitors (9%), and that was more / easier and cheaper parking.

A little under one in ten (7%) wanted to see improvements made to the café / catering facilities while smaller proportions called for more paths / trails , more dog poo bins, longer / more challenging trails and better / more toilets and changing room facilities (all mentioned by 4% of visitors).

1.6 Visitor profile

In 2015, almost a quarter of visitors to Dalby were first-time visitors (23%) which is in line with the all England site average of 24%, and unchanged since 2012. Over three-quarters of visitors were therefore repeat visitors to Dalby (77%).

Typically across all England sites, 85% were 'day trippers' and 14% were staying visitors, whereas at Dalby the split was 71% day trippers and 30% staying visitors. Dalby had significantly fewer local visitors in 2015 (35%) compared to 2012 and the all England average, with 60% of visitors in 2012 and 74% of all England visitors saying they had travelled less than three hours to reach the site. Over a third of visitors to Dalby had travelled over three hours for their day trip (36%), which was higher than reported in the previous research (22%), and considerably higher than the all England average (11%).

As a result, visitors to Dalby in 2015 were also more likely to be staying in the area overnight or as part of a longer holiday. (30% in 2015 compared to 18% in 2012 and 14% for all England).

Group sizes were slightly larger at Dalby (averaging 3.7 people) than the all England average (3.2 people). Just under half of visitors to Dalby were there with children (46%). This proportion had increased since the 2012 research but was similar to the all England average (48%). Even though the proportion of groups visiting Dalby with children was slightly lower than the all England average, the average number of children per group was slightly higher than average at the site (mean of 2.3 children per group at Dalby compared with 2.1 all England).

The gender profile at Dalby was exactly the same as the average across all England sites, with a slight slant towards females; 53% of visitors were women, and 47% were men.

In terms of the age profile, Dalby visitors were similar in age to the all England average. However, Dalby visitors were slightly more likely to be under 45 than over: almost three fifths of visitors at Dalby were under 45 (56%), whilst just over two fifths (43%) were aged over 45. Across England sites, the split was more even: 51% under 45, 48% over 45.

Visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 63%) than C2DE (skilled and unskilled manual workers and the unemployed = 35%). This was also replicated across all

England sites on average (69% ABC1, 30% C2DE). NB 2% refused to answer this question at Dalby hence the total not equalling 100%.

Over two fifths (44%) of Dalby visitors had children in the household, which was slightly lower than the all England average (47%).

The overwhelming majority of visitors to Dalby were white British / Welsh / Irish (92%), with only a small number of visitors describing their ethnicity as 'White Other European' (3%) or 'Black / Asian / Mixed' (5%).

2. Introduction

2.1 Background

The woodland estates managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) cover 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 the 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 conducted 8,417 interviews with visitors to forest and woodland sites across England and Wales. In 2015, a total of 2,950 interviews were conducted: 1,762 in England and 1,188 in Wales.

A total of 42 sites were 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 2015, interviews were conducted at 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

Table 1 below details the sites surveyed in 2015, 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
Dalby	259	Cadair Idris (H)	233
Fineshade	274	Craig y Ddinas (M)	144
Haldon	243	Fforest Fawr (M)	147
Hicks Lodge	233	Gwaun Hepste (M)	127
Jeskyns	287	Hafod (M)	140
Kielder	244	Newport Wetlands (H)	233
Wyre	222	Tan y Coed (M)	164
TOTAL	1,762	TOTAL	1,188

* H = High usage; M = Medium usage

Interviews were conducted face-to-face with visitors who were 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 2015. At Dalby, interviewing took place between 31st of March and 11th October, and a total of 259 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Dalby in 2015, 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 2012 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 Dalby. Table 2 overleaf details the profile of visitors, compared with the profile of visitors to all sites surveyed in England in 2015 and shows that the demographic profile of visitors to Dalby was largely in line with that of the visitors to all the England sites.

The gender profile at Dalby was exactly the same as the average across all England sites, with a slight slant towards females; 53% of visitors were women, and 47% were men.

In terms of the age profile, Dalby visitors were similar in age to the all England average. However, Dalby visitors were slightly more likely to be under 45 than over: almost three fifths of visitors at Dalby were under 45 (56%), whilst just over two fifths (43%) were aged over 45. Across England sites, the split was more even: 51% under 45, 48% over 45.

Visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 63%) than C2DE (skilled and unskilled manual workers and the unemployed = 35%). This was also replicated across all England sites on average (69% ABC1, 30% C2DE). *NB 2% refused to answer this question at Dalby hence the total not equalling 100%.*

Over two fifths (44%) of Dalby visitors had children in the household, which was slightly lower than the all England average (47%).

The overwhelming majority of visitors to Dalby were white British / Welsh / Irish (92%), with only a small number of visitors describing their ethnicity as 'White Other European' (3%) or 'Black / Asian / Mixed' (5%). Again, this was largely in line with the all England data but the proportion of 'Black / Asian / Mixed' was slightly higher than average at Dalby – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2015

		Dalby %	All England %	
Gender	Male	47	47	
	Female	53	53	
Age	16 - 24	10	4	
	25 - 34	20	17	
	35 - 44	26	30	
	45 - 54	22	22	
	55 - 64	11	14	
	65+	10	12	
Social class	AB	27	37	
	C1	36	32	
	C2	18	20	
	DE	17	10	
	Refused	2	1	
Working status	Full-time employee (30+ hours per week)	53	54	
	Part-time employee (<30 hours per week)	14	17	
	Self-employed	2	4	
	Full-time education	5	2	
	Unemployed	2	1	
	Permanently sick / disabled	2	1	
	Retired	14	15	
	Looking after home	7	5	
	Other	1	<1	
	Refused	2	1	
	Limiting illness	Yes – limited a lot	-	1
Yes – limited a little		5	4	
No		93	94	
Refused		1	1	
Children in household	Yes	44	47	
	No	56	53	
	Refused		<1	
Ethnicity	White – British / Welsh / Irish	92	96	
	White – Other	3	2	
	Black / Asian / Mixed	5	2	
	Refused	<1	<1	

Base: All visitors – Dalby (259); All England (1,762)

3.2 Group profile

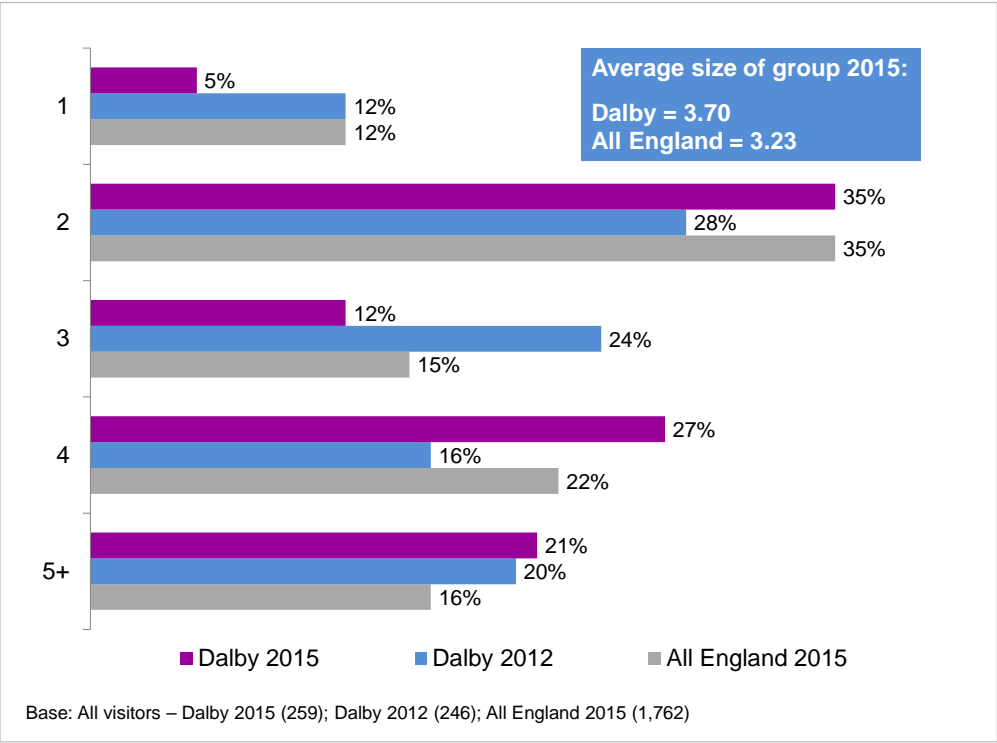
3.2.1 Size of group

Group sizes were slightly larger at Dalby (averaging 3.7 people) than the all England average (3.2 people).

Visitors at Dalby in 2015 were more likely to visit in pairs (35%): this has increased since 2012 (28%) but almost half of visitors to Dalby visited in a group of four or more: this proportion has increased significantly since 2012 (48% and 36% respectively).

Just 5% were visiting Dalby alone, a significant drop from 12% in 2012, which was more in line with the all England average which was also 12%.

Figure 1: Q1. Total size of the group



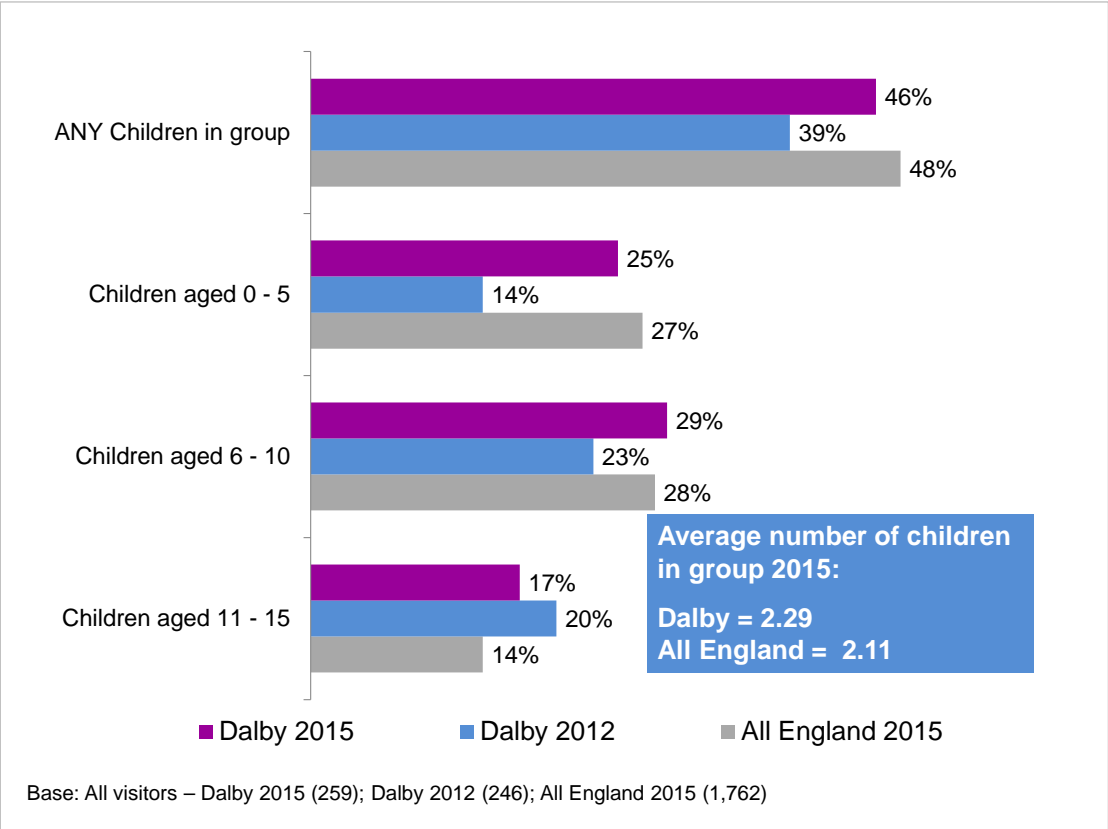
3.2.2 Composition of group

Just under half of visitors to Dalby were there with children (46%). This proportion has increased since the 2012 research but is similar to the all England average (48%).

Even though the proportion of groups visiting Dalby with children was slightly lower than the all England average, the average number of children per group was slightly higher than average at the site (mean of 2.3 children per group at Dalby compared with 2.1 all England).

The ages of children in the groups were largely consistent with the all England findings but the proportion of children under 10 years had increased from 37% in 2012 to 54% in 2015.

Figure 2: Q1. Composition of group



4. Profile of visit

4.1 Type of visit

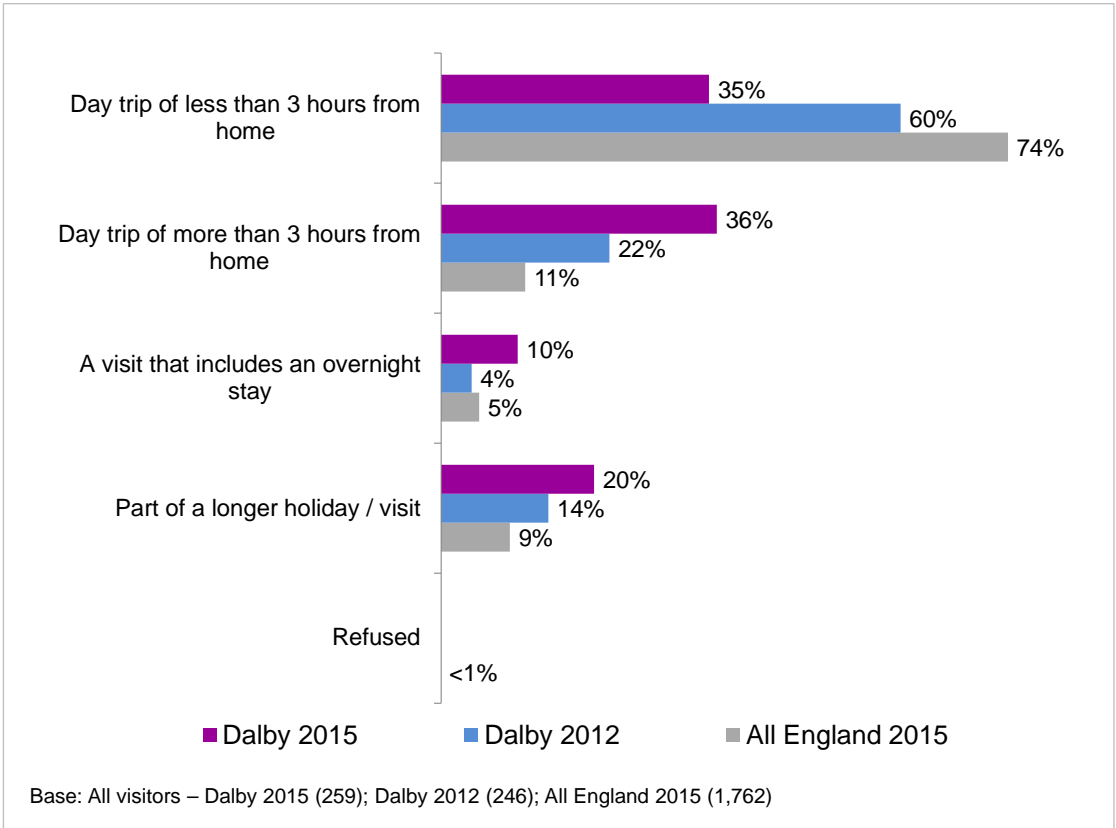
Typically across all England sites, 85% were ‘day trippers’ and 14% were staying visitors, whereas at Dalby the split was 71% day trippers and 30% staying visitors.

Dalby had significantly fewer local visitors in 2015 (35%) compared to 2012 and the all England average, with 60% of visitors in 2012 and 74% of all England visitors saying they had travelled less than three hours to reach the site.

Over a third of visitors to Dalby had travelled over three hours for their day trip (36%), which was higher than reported in the previous research (22%), and considerably higher than the all England average (11%).

As a result, visitors to Dalby in 2015 were also more likely to be staying in the area overnight or as part of a longer holiday. (30% in 2015 compared to 18% in 2012 and 14% for all England).

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 Dalby travelled from within England, most of whom came from Yorkshire and Humberside (64%). The bulk of the remaining English visitors had come from North East England (12%), East Midlands (7%) and North West England (5%). Only 2% came from outside of England from either: Wales, Scotland, and Northern Ireland or abroad.

Table 3 below and Figure 4 overleaf provide more details.

Table 3: Q28a. Visitor origin 2015

		Dalby %	All England %
Home region	North East England	12	11
	Yorkshire & Humberside	64	11
	North West England	5	2
	West Midlands	2	14
	East Midlands	7	24
	East of England	2	4
	Greater London	<1	1
	South East England	4	17
	South West England	1	13
Home nation	England	98	
	Wales	<1	<1
	Rest of UK	1	1
	Abroad	<1	<1

Base: All visitors – Dalby (259); All England (1,762)

Figure 4: Map of visitor origin for Dalby



4.3 Frequency of visits

4.3.1 First-time visitors

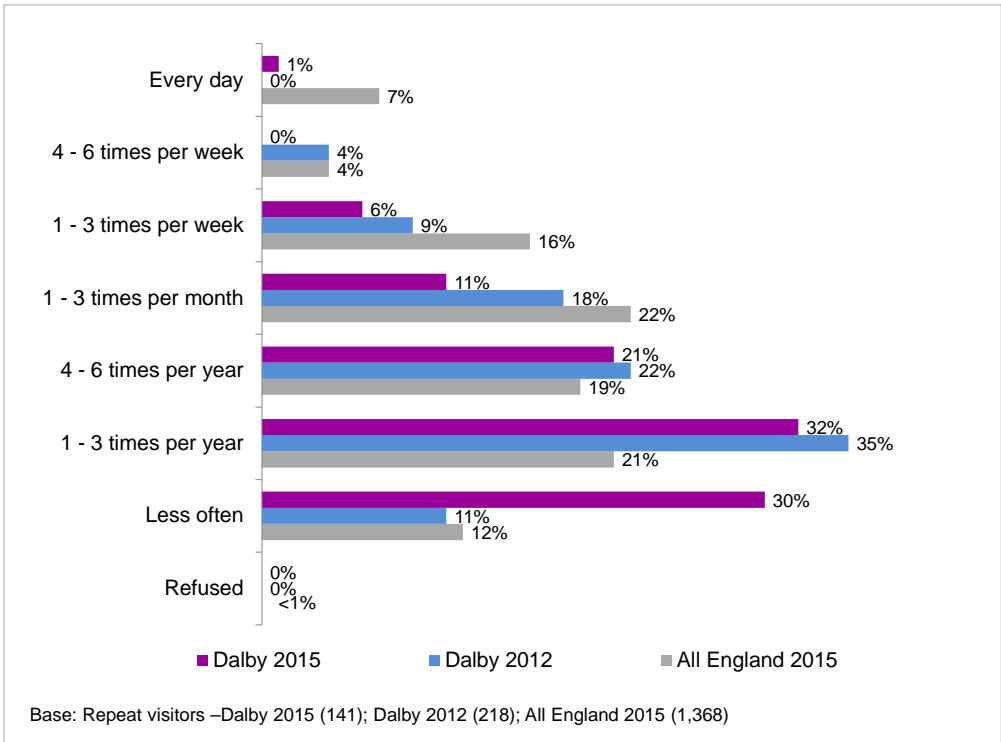
In 2015, almost a quarter of visitors to Dalby were first-time visitors (23%) which is in line with the all England site average of 24%, and unchanged since 2012. Over three-quarters of visitors were therefore repeat visitors to Dalby (77%).

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 (83%). This was more than was seen in the 2012 survey (68%) and considerably more than the all England average of 52%.

Just under a fifth (18%) visited the site monthly or more often in 2015, whereas almost a third (31%) had visited at least once a month in 2012. Both these figures were significantly lower than the all England average of 49%.

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



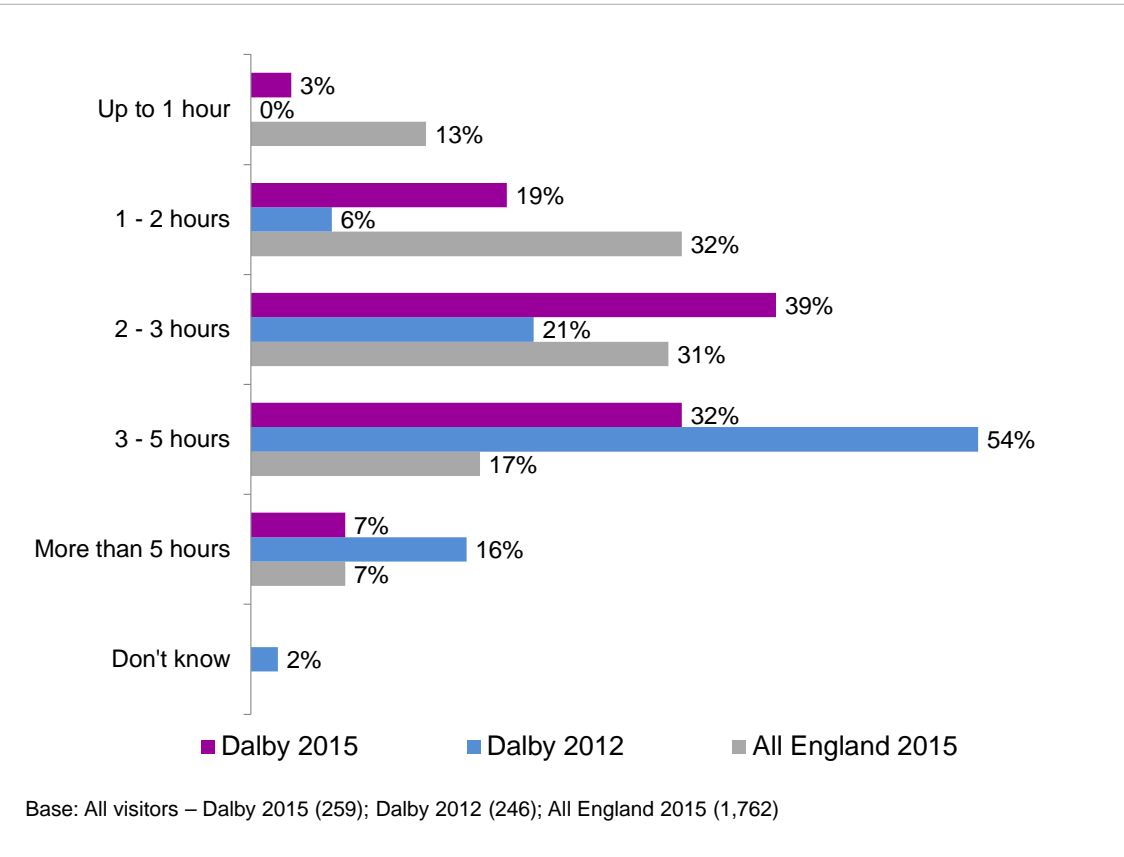
4.4 Length of visit

The average length of visit was 41 minutes shorter at Dalby in 2015 than in 2012, with visitors spending, on average, 2 hours and 59 minutes at the site. The average length of stay across all sites in England was somewhat shorter, at 2 hours and 26 minutes.

Figure 6 shows the individual lengths of time visitors spent at Dalby and shows that the shorter average visit duration reported in 2015 has been as a result of significantly fewer visitors saying they stayed for more than 3 hours than previously reported– down from 70% to 39%.

On the whole, visitors to Dalby were more likely to spend between 2-5 hours at the site compared to the all England average (71% at Dalby compared to 48% on average across all England) – 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.

The most popular activity at Dalby was walking generally (49%) which was much lower than the England average (67%) but was a considerable increase on 2012 when just 28% said they had taken part in walking activities on their visit.

Conversely, cycling was far less popular in 2015 than 2012, with only 27% having taken part recently, compared with 72% in the previous survey. Across all England sites in 2015, 30% had taken part in cycling activities.

Visiting the café was the second most popular activity at Dalby, with 48% of visitors using it: up slightly from 43% in 2012 but slightly lower than the all England average (54%).

The play area was used by 25% of visitors, an increase since 2012 when only 15% had used it.

The picnic and BBQ areas were also more popular at Dalby in 2015 than they were in 2012 (24% in 2015 compared with 10% in 2012).

Go Ape! and the play trails were new features mentioned in the 2015 survey by 12% and 9% of visitors respectively.

Overall, the vast majority of visitors took part in 'active' activities (87%), which is an increase on the 2012 average (78%) but it is slightly lower than the all England average (94%) - see Table 4 overleaf.

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

	Dalby 2015 %	Dalby 2012 %	All England 2015 %
Cycling on forest roads, tracks or trails	17	65	20
Cycling off trails or tracks	15	12	15
TOTAL CYCLING	27	72	30
Walking on a sign-posted trail	25	19	38
Walking but not following sign-posts	19	8	8
Dog walking	14	6	29
TOTAL WALKING	49	28	67
Using the café / restaurant / other catering	48	43	54
Using the play area	25	15	25
Picnic or barbeque	24	10	7
Using the Visitor Centre / shop	24	25	9
Admiring the views	12	22	13
Go Ape!	12	-	4
Gruffalo Trail / Superworm Trail	9	-	2
A forest drive	6	-	1
Photography	4	8	2
Nature / natural history visit	4	-	2
Seeing something in the forest	4	-	6
Camping	3	-	1
Bird watching	2	2	3
Running / jogging	2	-	2
Organised event / trip	1	-	1
Orienteering / Geocaching	<1	1	<1
Horse riding / pony trekking	<1	1	<1
Other	3	9	6
Taken part in ACTIVE activities	87	78	94

Base: All visitors – Dalby 2015 (259); Dalby 2012 (246); All England 2014 (1,762)

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 Dalby lasted 2 hours and 59 minutes on average. Visitors were spending less time at the site in 2015 as they had spent, on average, 41 minutes longer on the site in 2012 when the average time spent at the site was 3 hours and 40 minutes.

Those walking spent an average of 1 hour and 44 minutes doing so: a small 2 minute increase since 2012, when the average time spent walking was 1 hour and 42 minutes.

The average time spent cycling at Dalby in 2015 was higher than the average walking time, at 2 hours and 30 minutes: however, visitors were cycling for 43 minutes less in 2015 as the average cycling duration in 2012 was 3 hours and 13 minutes.

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

	Total duration of visit		Time spent on any walking		Time spent on any cycling	
	2015 %	2012 %	2015 %	2012 %	2015 %	2012 %
Up to 30 minutes	1	-	2	3	1	-
31 – 60 minutes	2	-	21	11	4	-
1 – 2 hours	19	6	46	56	21	19
2 – 3 hours	39	21	25	20	52	23
3 – 5 hours	32	54	6	2	21	52
5+ hours	7	16	1	2	-	5
Don't know	-	2	-	6	-	1
AVERAGE	2 hrs 59 mins	3 hrs 40 mins	1 hr 44 mins	1 hr 42 mins	2 hrs 30 mins	3 hrs 13 mins

Base: All respondents - 2015 (259); 2012 (246), Respondents who walked - 2015 (126); 2012 (64), Respondents who cycled – 2015 (67); 2012 (166)

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

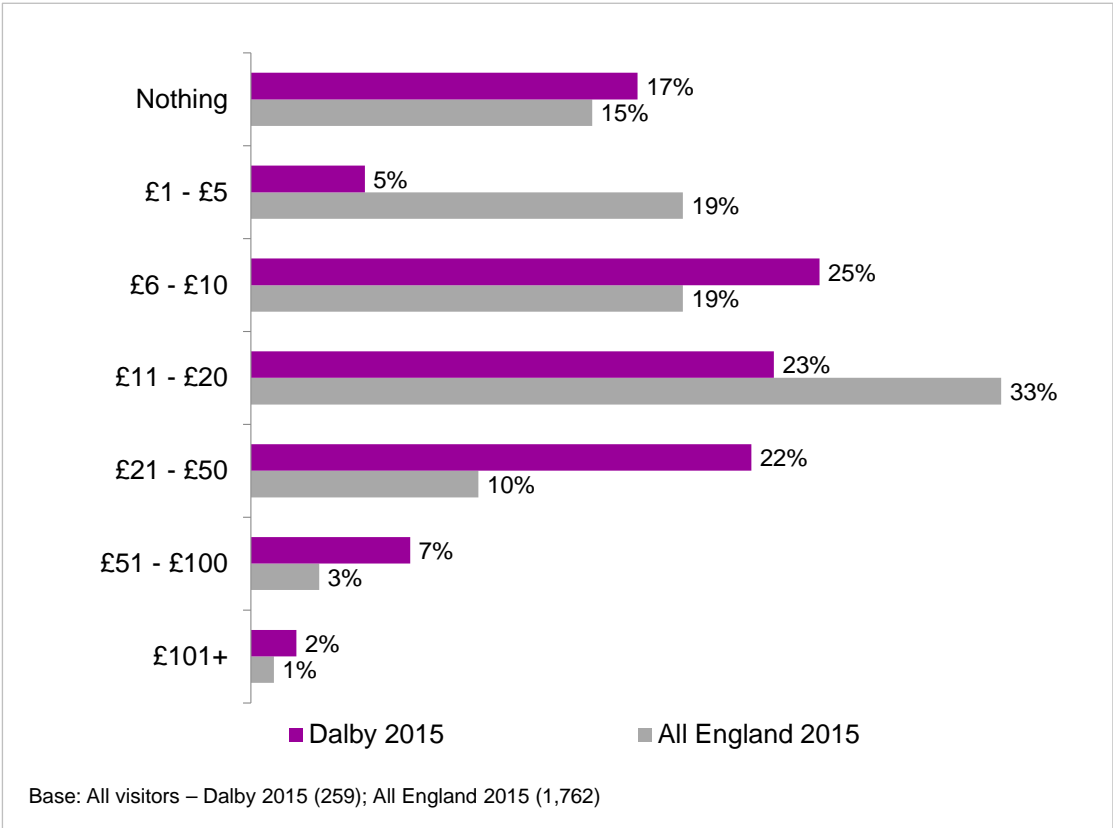
Visitors to Dalby were asked how much they intended to spend during their visit at the site on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. Figure 7 shows the figures calculated by combining the data across all types of intended spending. Please note that due to a change in the administering of this question, comparisons with 2012 spend was not possible.

One in six visitors to Dalby said they did not intend to spend any money at the site (17%), which was in line with the all England average (15%).

Almost a third of visitors planned to spend over £21 on their visit (31%), which represents a higher spending than typically recorded at other sites, with less than one in six visitors spending over £21 on their visit across the all England sites on average (14%).

Overall, the average spend at Dalby was higher than average at all England sites at £20.00 (compared with £14.69 all England average).

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 Dalby was most likely to spend on was parking, with almost two thirds planning to spend on this (63%). The average planned spend on parking was £5.35, a little more than the all England average of £3.01.

NB The spend data is based on all visitors, not only 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 food and drink; just over half of visitors were likely to spend on food and drink (52%), with an average spend of £7.46 at Dalby. This was slightly lower than the all England (£8.32).

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

	% spending anything on items		Average spend on items £	
	Dalby %	All England %	Dalby £	All England £
Parking	63	71	£5.35	£3.01
Food and drink	52	65	£7.46	£8.32
Souvenirs / gifts	25	5	£2.91	£0.50
Activities at the site	13	5	£3.68	£3.09
Hiring equipment	4	2	£1.59	£0.56
Anything else	14	2	£1.97	£0.32

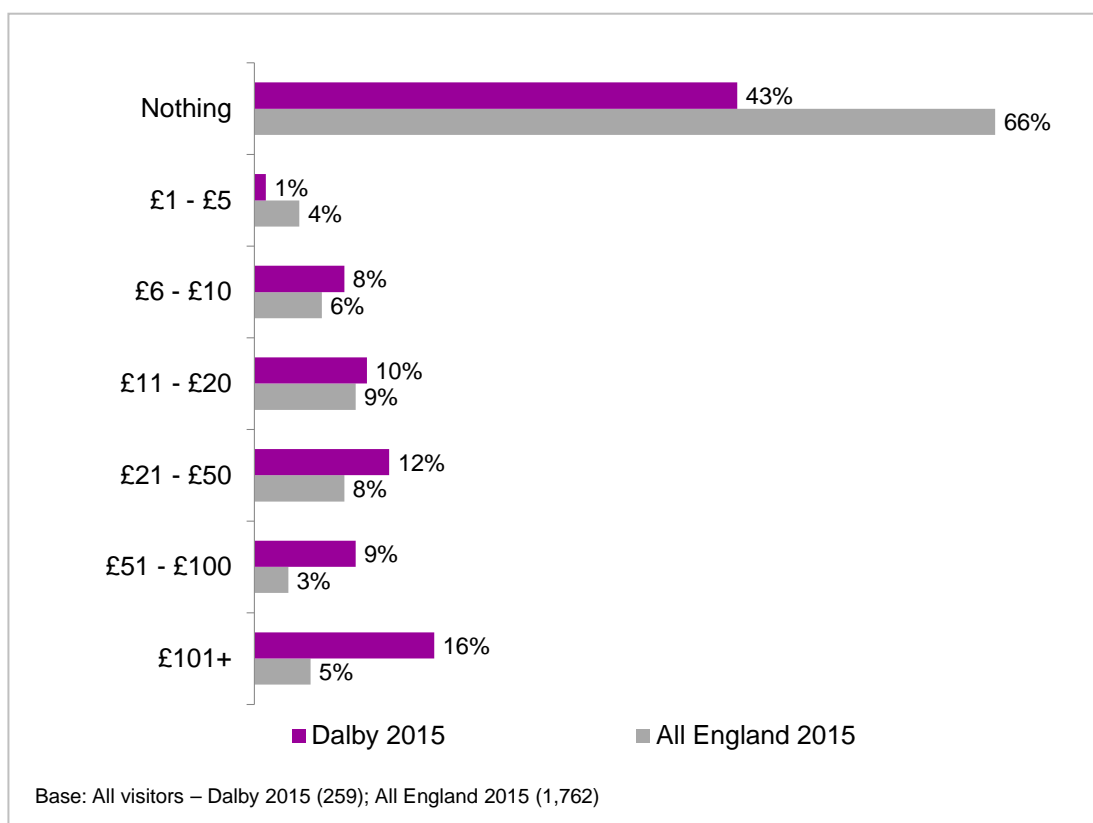
Base: All visitors – Dalby 2015 (259); All England 2015 (1,762)

Visitors to Dalby 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 shows the figures calculated by combining the data across all types of spending. Again, 2012 comparisons have not been made due to changes in the administering of this question.

Over two fifths of visitors to Dalby said that they would not be spending any money in the local area as a result of their trip (43%); this was considerably lower than the all England average (66%).

The average intended spend in the area was £93.35, and was considerably higher than the all England sites average of £31.32.

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 Dalby, transport, food and drink and parking were the main areas of intended spending: 39% planned to spend on transport (average of £18.75); 35% would spend on food and drink (average of £24.02) and 30% would spend on parking (average of £5.08).

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

	% spending anything on items		Average spend on items £	
	Dalby %	All England %	Dalby £	All England £
Transport	39	11	£18.75	£3.47
Food and drink	35	25	£24.02	£10.02
Parking	30	19	£5.08	£1.26
Souvenirs / gifts	19	4	£10.80	£1.61
Accommodation	14	5	£41.30	£14.69
Admissions to other attractions	12	3	£5.42	£1.16
Hiring equipment	6	1	£2.82	£0.40
Anything else	10	5	£14.09	£2.35

Base: All visitors – Dalby 2014 (259); All England 2014 (1,654)

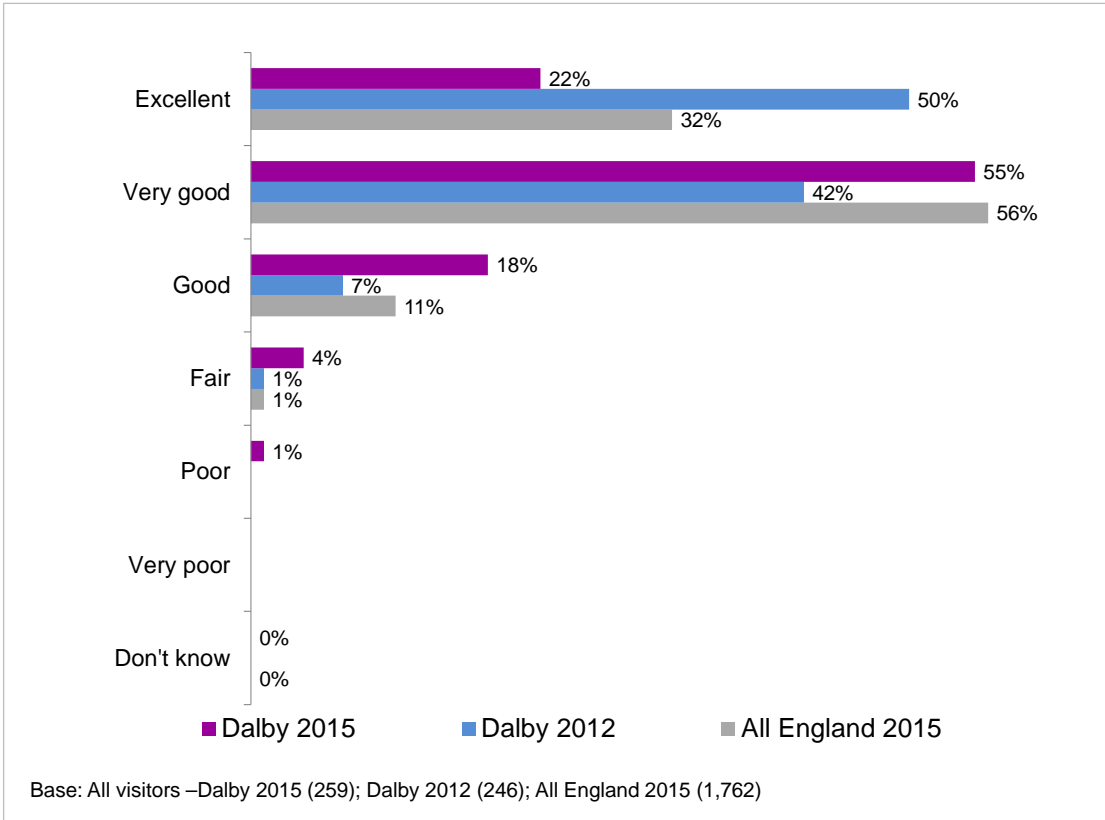
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Dalby 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 2012. Very few visitors (1%) interviewed at Dalby in 2015 gave a negative rating of the site, whilst over three quarters of visitors (77%) said it was excellent or very good. However, there was a significant drop in the proportion rating the site as excellent since 2012, when 50% said it was excellent compared to 22% in 2015. The excellent rating for Dalby was also lower than the all England average of 32%.

A further 18% said the site was good and 4% said the site was fair. The proportion giving the site a rating of either 'good' or 'fair' increased by 14% in 2015, as only 8% gave the site a rating of either good or fair in 2012.

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

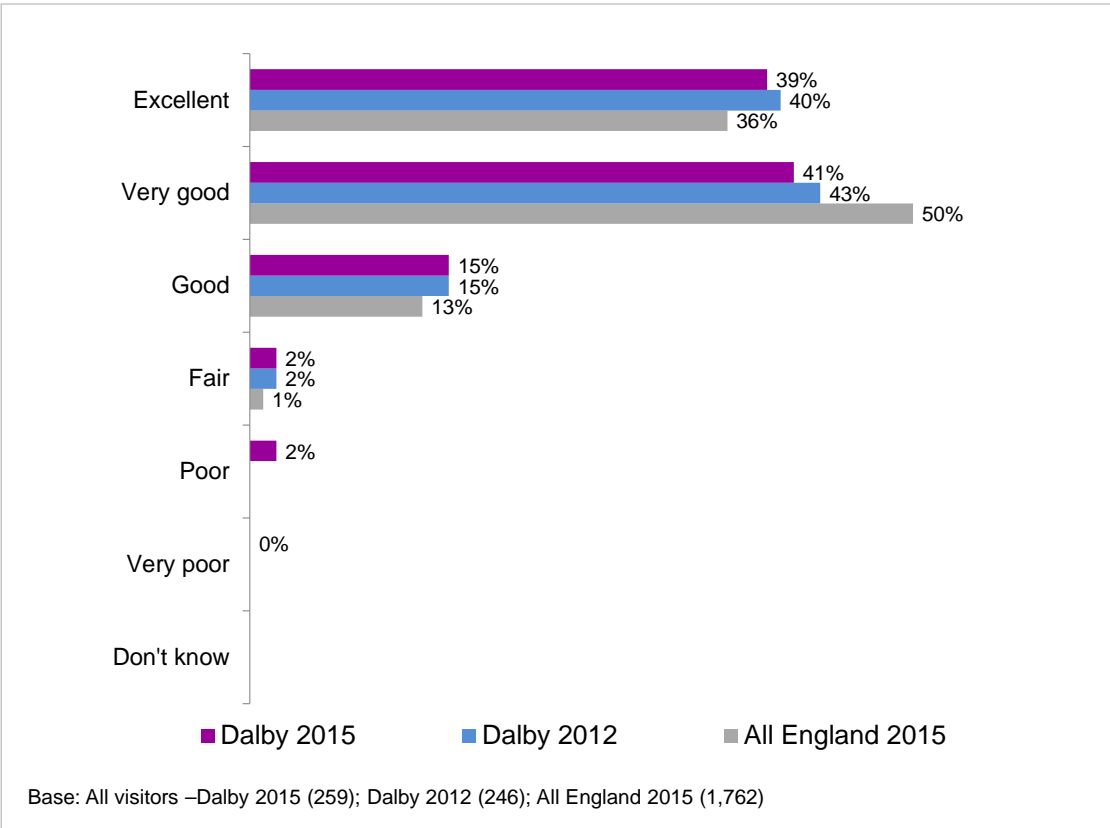


5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Dalby was seen to be were very positive. This was also found across all England sites on average, and in the 2012 survey.

Only a very small proportion of visitors interviewed at Dalby gave a less than positive rating of the site in terms of it being safe and welcoming (2%), whilst almost two fifths said it was excellent (39%). The ratings were very similar to the ratings given in 2012 and the all England average.

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 Dalby and all England sites.

When asked why they gave Dalby a positive rating, visitors were most likely to mention the scenery / beautiful environment (31%). This was the main reason on average for all England sites as well (41%)

Other popular mentions included the fresh air / outdoor space (26%), it being a good, safe place for all people generally (22%), peaceful, pleasant and tranquil (19%) and a good, safe environment for children to play and run around (19%).

Other comments made by 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

	Dalby 2015 %	All England 2015 %
The scenery / views / beautiful environment	31	41
Fresh air / open space / plenty of space / freedom	26	24
Safe environment generally for all people	22	19
Peaceful / pleasant / tranquil / relaxing / welcoming	19	21
Good, safe place for the kids to play / run around	19	22
Well laid out / well organised / good set-up	18	18
Good provision of paths / trails and tracks	14	25
Friendly / helpful staff or rangers	13	8
Other visitors here are friendly	12	5
Good quality facilities / amenities	11	11
Clean / tidy / well maintained / litter-free	10	11
Well signposted / good maps / info boards	9	13
Live locally / convenient / easy to get to / close	8	9

Base: Visitors rating the site as excellent, very good or good – Dalby 2015 (248); All England 2015 (1,743)

Further comments made by fewer than 2% visitors included:

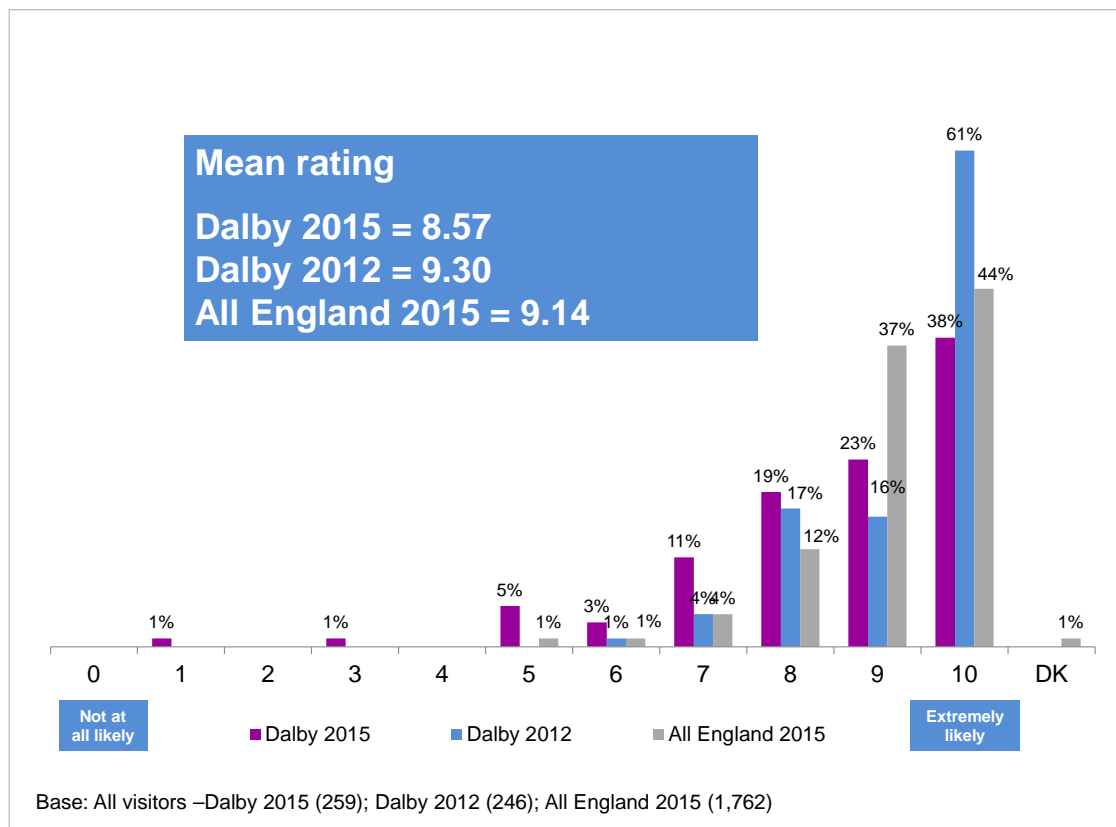
- Plenty of other people around
- Away from the roads / no cars / cars drive slowly
- Been before / familiar with the site.

5.3 Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Dalby 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 Dalby and all England sites generally were extremely positive: only 10% gave a rating of less than 7/10 for Dalby, and almost two fifths gave the site 10 out of 10 (38%).

Significantly more visitors gave the top rating back in 2012 (61%), which is reflected in the overall mean scores for the site. Dalby's average rating in 2012 was 9.3 but in 2015 it was 8.57. This average was also lower than the all England average of 9.14; however, the ratings were still high for Dalby.

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 Dalby in 2015 is 51, which is lower than the scores for both 2012 and the all England average (77 and 78 respectively).

5.4 Favourite things about the site

Visitors to Dalby 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 3% or more of the sample are outlined in Table 8 below.

No single aspect of Dalby stood out as favourite, with around a third of visitors enjoying the scenery and views (30%), while around a quarter of visitors enjoyed the walks / paths / trails (25%), fresh air / being outside (23%) or the cycle trails (22%). A further fifth said their favourite aspect was the children's activities (20%), peace / tranquillity / relaxing atmosphere or the fact that it was clean / well looked after (19% for each).

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

Activities	Dalby 2015 %	Dalby 2012 %	All England 2015 %
Scenery / views / beautiful / natural	30	37	29
Walks / paths / trails	25	13	40
Fresh air / being outside	23	12	16
Cycle trails / freedom / opportunity to cycle	22	57	22
Activities that are good for the children	20	17	20
Peace / tranquillity / relaxation / atmosphere	19	23	30
Clean / well looked after	19	9	11
Exercise / keeping fit	18	9	12
Good on-site facilities / BBQ areas / gift shop	17	24	12
Opportunity to spend time with family / friends	15	7	14
Been before / wanted to come again	13	-	12
Like forests / trees / variety of trees and plants	12	7	16
Safe environment generally	11	9	10
Lots to see and / or do	10	-	6
The weather	10	-	3
Close to home / convenient location	9	12	16
Cost / value for money / free	8	-	3
Wildlife / birdwatching	3	-	5

Base: All visitors – Dalby 2015 (259); Dalby 2012 (246); All England 2015 (1,762)

Some other favourite aspects of the site that were mentioned by 2% or less of visitors included:

- Helpful pleasant staff
- Go Ape!
- Ideal for dogs / dog friendly / safe for dogs
- Well laid out / good layout
- Remote / away from traffic
- Something different / a change
- Café / restaurant
- Open space / plenty of space
- Not crowded / not too many people
- Site specific event
- Sculptures / art
- Friendly people

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

- A higher proportion of older visitors liked the scenery (40% of people who were 55+) than average, followed by the walks, paths and trails (36%).
- Younger visitors were more likely to say they enjoyed the opportunity to spend time with family and friends than the other age groups (24% of 16-34s compared with 12% of 35-54s and 8% of 55+s).
- The cycle trails were also more popular than average with adult only visitors (26%) and male visitors (34%).

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.

Two fifths of visitors to Dalby could not think of anything that would add to their enjoyment and only made positive comments (40%); this was a similar proportion to the all England average (45%).

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 almost one in ten visitors (9%), and that was more / easier and cheaper parking.

A little under one in ten (7%) wanted to see improvements made to the café / catering facilities while smaller proportions called for more paths / trails , more dog poo bins, longer / more challenging trails and better / more toilets and changing room facilities (all mentioned by 4% of visitors).

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

	Dalby 2015 %	All England 2015 %
Nothing / general positive comments	40	45
Better parking (easier, cheaper, more, free)	9	14
Improve café / catering	7	3
More trails, paths and cycle tracks	4	5
More dog poo bins / remove dog poo	4	11
Longer, more challenging trails, paths and cycle routes	4	3
Improve toilets / more toilets / shower facilities / changing area	4	2
More seating	3	1
More picnic areas / BBQ / picnic tables and benches	3	1
More activities for children / more play areas	3	5
Improve signage / more maps / better maps	3	2
More bins / recycling bins	3	4
Cheaper prices (e.g. admission)	3	<1
Improve maintenance of paths / cycle trails	2	2

Base: All visitors – Dalby 2015 (259); All England 2014 (1,762)

Other potential improvements not shown above as mentioned by fewer than 2% of visitors included:

- Easier / less challenging trails, paths and cycle routes
- Cheaper café
- On-site pub
- More sheltered areas
- Expand Go Ape! / more zip wires
- More information on wildlife / vegetation / areas
- Better weather
- Drinking water taps
- More wildlife / birds
- More activities / sports (tennis courts, football, horse riding)
- Camping / places to stay overnight (lodges)
- Provide more cafés / catering facilities
- Have a cashpoint / accept card payments
- Fewer people / fewer cyclists

When asked if there was anything that interfered with their enjoyment of their visit to Dalby, over half reported that nothing had interfered with their enjoyment (53%): this was a little lower than the all England average of 57%.

Poor weather (wet, raining or windy) was mentioned most often at 9%.

Clearly nothing can be done about the weather but the other top factors mentioned were: car park charges were too expensive (6%), not enough / closed / dirty toilets, and poor service in café because of long queues or inconvenient opening hours (5% for both).

The comments given by 3% or more of the sample are outlined in Table 10 overleaf.

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

	Dalby 2015 %	All England 2015 %
Nothing	53	57
Wet / raining / windy (poor weather)	9	11
Car park expensive / should be free parking	6	9
Toilets – not enough / closed / need cleaner toilets	5	2
Poor service in café / long queues / inconvenient opening hours	5	1
Not enough choice on the menu / not enough food available	3	1
Problems with car parks (faulty machines, limited spaces)	3	1
Signs unclear / need better signs / more maps	3	1

Base: All visitors – Dalby 2015 (259); All England 2015 (1,762)

Other comments, not shown above as made by 2% or less included:

- Need more litter bins / recycling bins / too much litter
- Comments on cost (e.g. admission)
- Too busy / too many kids
- Complaints about other visitors
- Café expensive
- Dogs off leads / loose dogs / don't want dogs around
- Lack of information / education about nature / forest / history
- Poor maintenance of site (paths, fences, waterways)
- Dog mess on paths / in play areas
- Lack of water sports / activities
- Couldn't find children's play trails / disappointed with children's play trails
- Need more shelters / need sheltered picnic areas
- Some paths are difficult / dangerous (steep drops / loose shale)
- Should have separate trails for cyclists / dog walkers / walkers with children
- No phone signal / No Wi-Fi
- Problems getting around the site (e.g. trails closed, no disabled access)

6. Site facilities

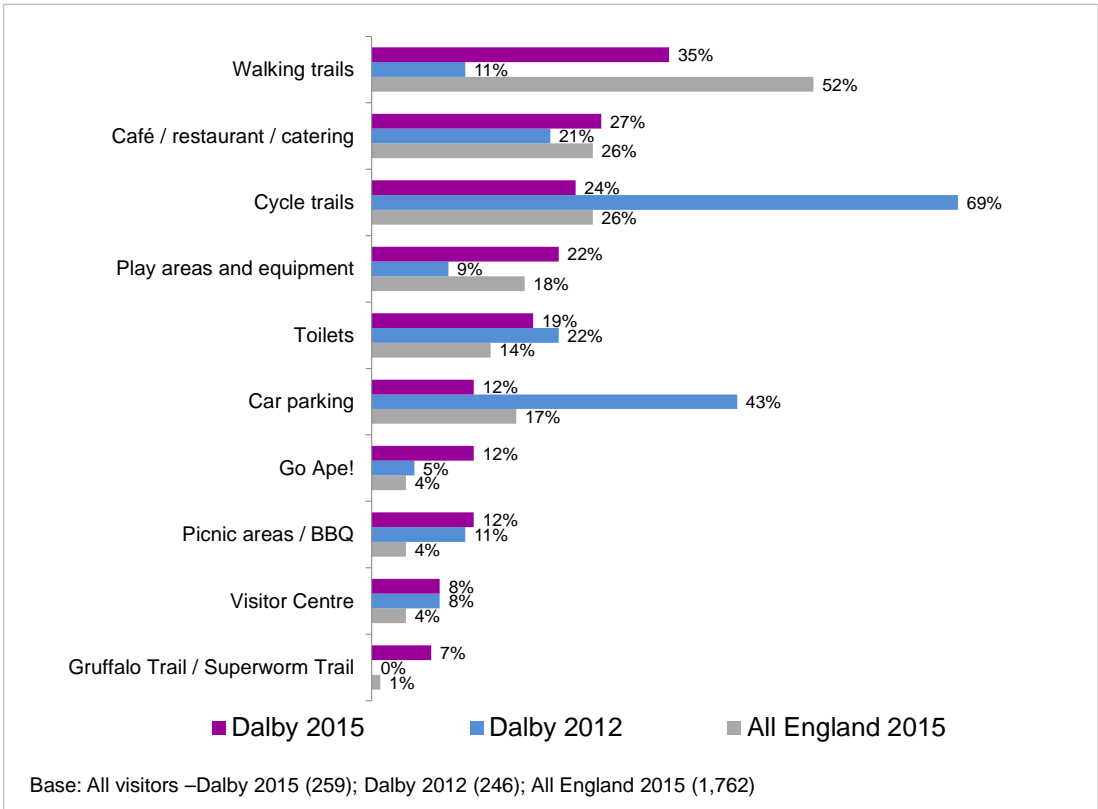
6.1 Importance of site facilities

Visitors were presented with a list of facilities available at Dalby 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 (35%): this figure was considerably higher than in the 2012 survey (11%) but lower than the all England average (52%).

This was closely followed by café / catering facilities (27%), similar to the all England average of 26%, but again higher than in 2012 when cycle trails were regarded as the most important influence on decision to visit (69%) – see Figure 12a below.

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



Beyond this, play areas and equipment (22%), toilets (19%) car parking and Go Ape! (12% each) were most likely to influence the decision to visit. This was largely in line with the all England average and the responses from the 2012 survey, although the importance of the car park had diminished in 2015

(down from 43% in 2012 to 12% in 2015) while the play area had more than doubled in importance (up to 22% in 2015 from 9% in 2012)

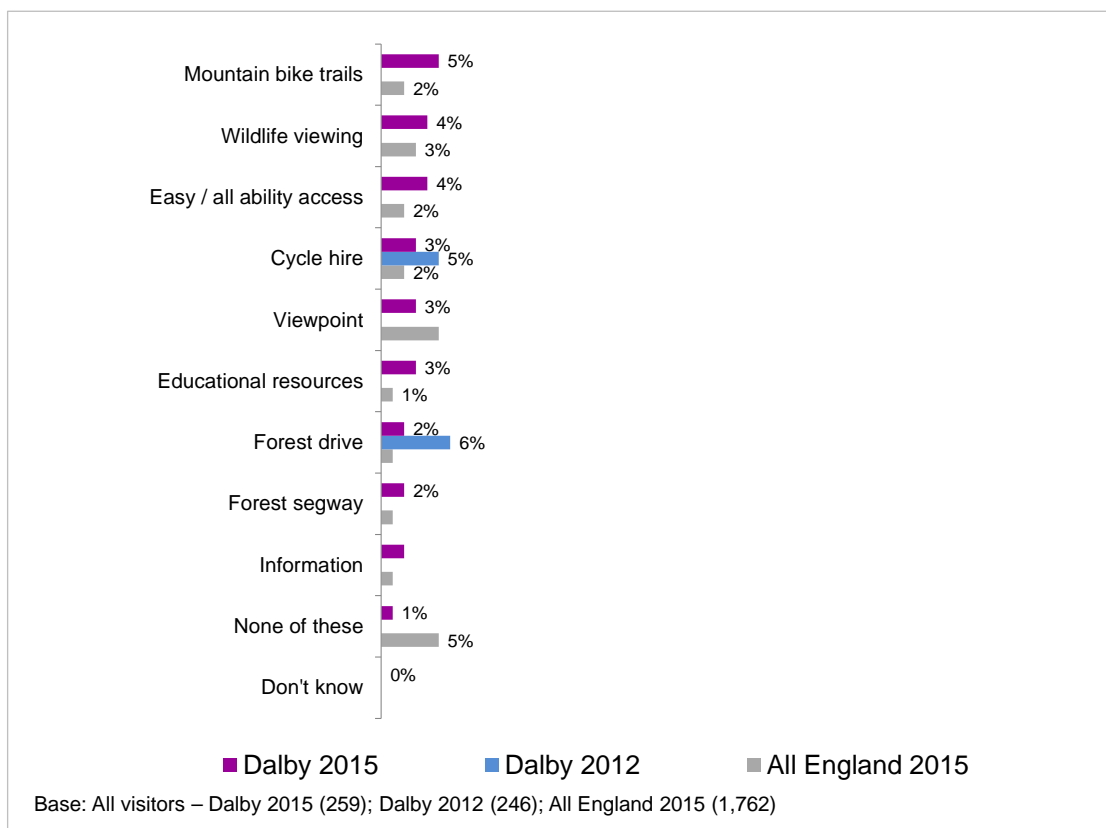
The importance of picnic areas had remained largely unchanged (12% from 11%), while Go Ape! had increased in importance (12% from 5%).

Unsurprisingly cycle hire facilities had declined in importance (3% from 5%), reflecting the significant decline in the cycle trails' importance (24% from 69%).

Mountain bikes trails (5%), wildlife viewing facilities (4%) and easy / all ability access (4%) had not been mentioned in 2012.

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 just under half of all visitors when choosing to come to the site (47%). The main one of these influencing visits was good weather / sunny / warm (4%): this is slightly higher than the all England average of 2%. All the remaining factors were mentioned by very small proportions of visitors - see Table 11 below for more detail:

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

	Dalby 2015 %	All England 2015 %
Nothing	53	69
Good weather / sunny / warm	4	2
Outdoors / fresh air / open spaces	2	1
A nice day out	2	2
Dog friendly / dogs can come off leads / dog facilities	2	4
Meeting / visiting with family and friends	2	1
Good for the children / can run around and play	1	2
Local / close to home / convenient	1	4
Go Ape!	1	<1
Something different / change	1	<1
Good value for money	1	<1
Close to where I'm staying	1	1
Relaxing / peaceful / tranquil	1	1

Base: All visitors – Dalby 2015 (259); All England 2014 (1,762)

Other factors mentioned by one or two visitors included:

- Site specific event (e.g. Race for Life)
- Friends / family recommended it
- To keep fit / exercise
- Been before / come here a lot / good memories
- Lots to do / lots of activities
- Read about the site on websites / magazines
- To see wildlife / birdwatching
- Easy to find / get to
- Was just passing / en route
- Wanted to go walking
- Good value for money
- Beautiful scenery / views
- Something different / 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 car park (67%), the café / restaurant / catering (56%), toilets (48%) and the walking trails (42%) were used by the highest proportion of visitors.

The cycle trails were used by around a quarter of visitors (24%), which was significantly higher than the proportion using the mountain bike trails (6%). Around a quarter of visitors also made use of the Visitor Centre (25%) and the play areas and equipment (22%).

Other facilities used by just under one fifth of visitors were picnic areas (19%) and the forest shop (17%) – see Figure 13a and 13b overleaf for more details:

Figure 13a: Q15. Facilities used at Dalby 2015

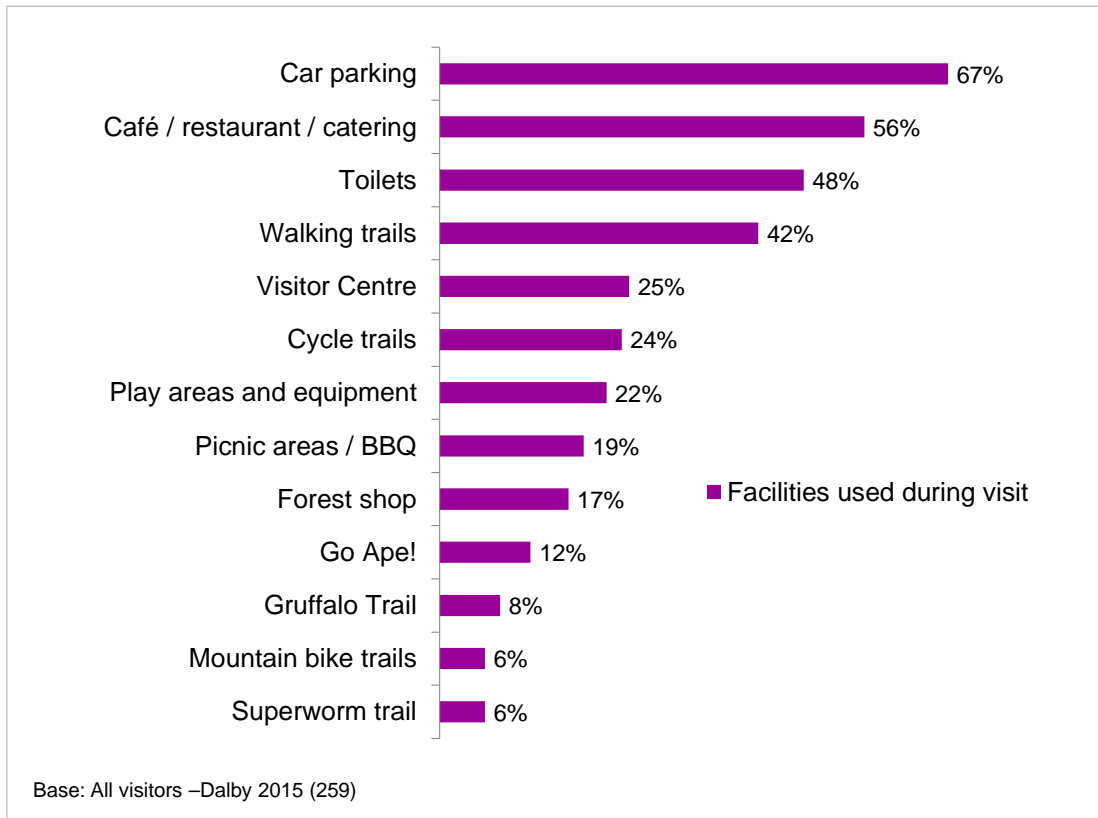
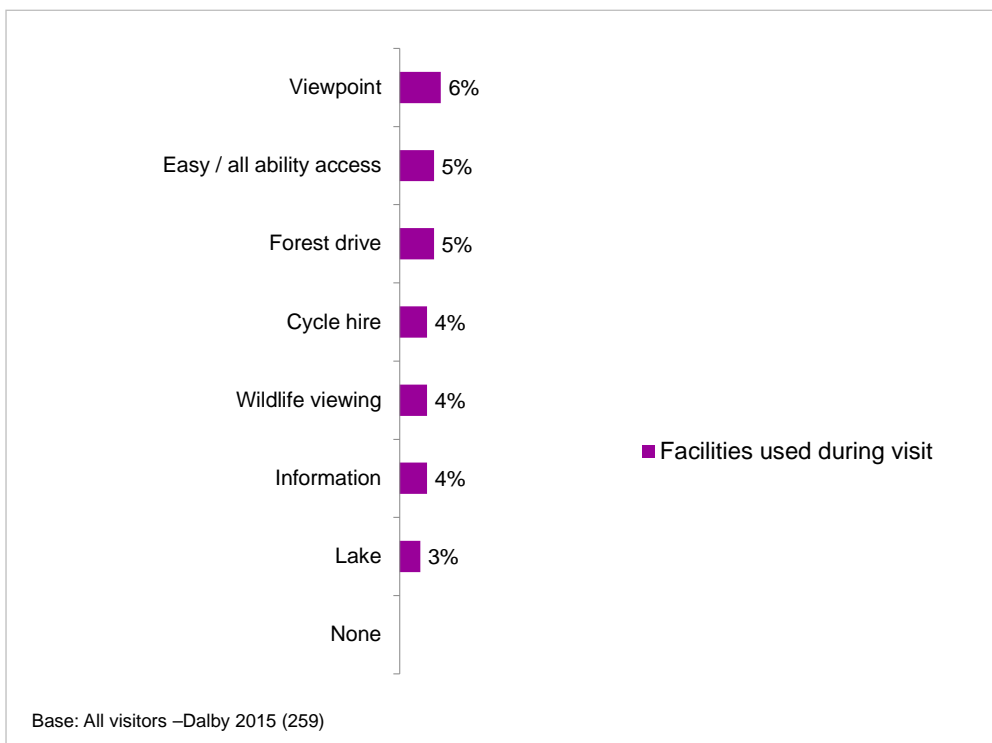


Figure 13b: Q15. Facilities used at Dalby 2015 - continued



6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by 50 or more visitors to Dalby 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’.

Walking trails received the highest score, with 30% rating this facility as excellent and nearly all of the remaining users rating it as very good (50%) or good (16%). Only 5% of those using this facility rated it as fair and no one gave the facility a negative rating.

Ratings for the picnic and BBQ areas, cycle trail and the play areas and equipment were similarly positive, with over one fifth of visitors rating them as excellent (24%, 22% and 21% respectively). Nobody rated any of these facilities as poor.

As shown in Figure 14, a majority of users rated all other facilities positively; however, the car park, café / restaurant / catering, and toilets were rated by around one in ten visitors (13%, 10% and 10% respectively) as poor. In addition, these facilities were rated as excellent by only relatively small proportions of visitors (3%, 4% and 13% respectively).

Figure 14: Q15b. Rating of Dalby site facilities (where used) 2015 – main facilities used

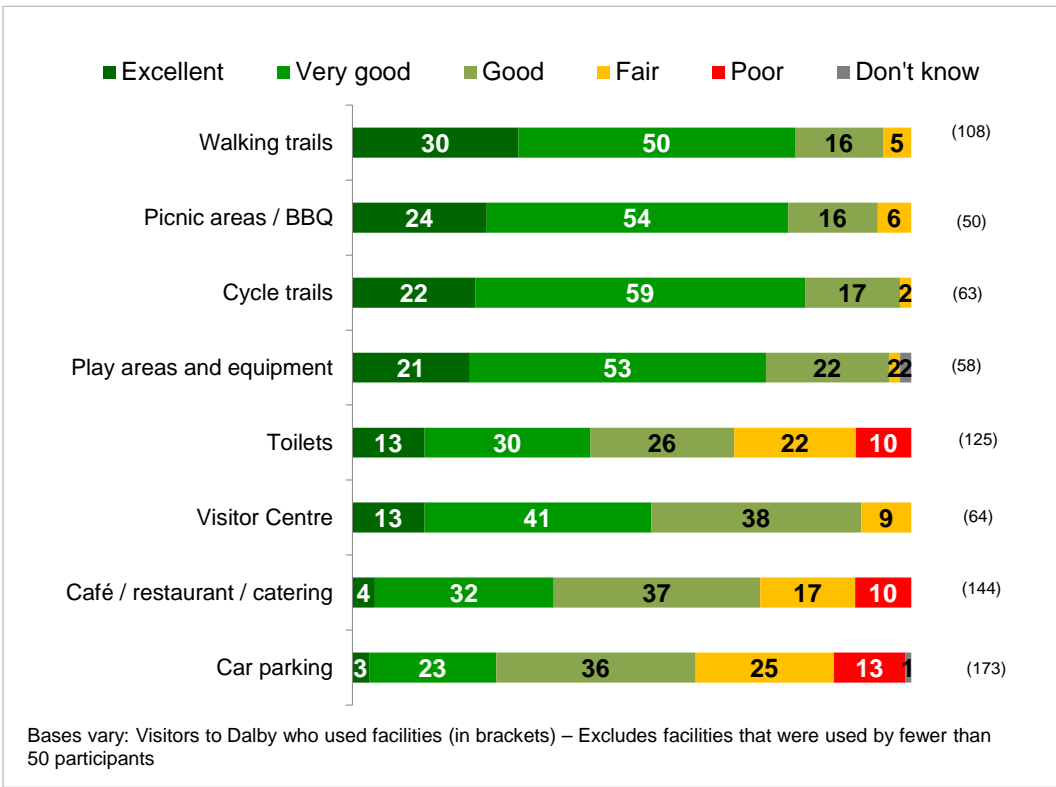


Table 12 compares the proportions giving ‘excellent’ ratings to the facilities used in 2015 compared with 2012, where they were mentioned in the previous survey.

For half 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 facility and the cycle trails (30 and 17 percentage point decreases respectively).

However, the walking trails, Picnic and BBQ areas and The Visitor Centre saw an increase in the proportion rating them as excellent (21, 4 and 3 percentage point increase respectively).

There was no change in the proportion of visitors rating the play areas and equipment as excellent.

Table 12: Q15b – Proportions rating facilities at Dalby as ‘Excellent’ 2015 vs. 2012

Facilities	Dalby 2015 %	Dalby 2012 %	% point change
Walking trails	30	19	+21
Picnic areas / BBQ	24	20	+4
Cycle trails	22	39	-17
Play areas and equipment	21	21	-
Visitor Centre	13	10	+3
Toilets	13	18	-5
Café / restaurant / catering	4	14	-10
Car parking	3	33	-30

Bases vary: visitors using each facility

7. Information about sites

7.1 Sources used to plan visit

Visitors were asked where they found out about Dalby 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.

Almost half of visitors (48%) had always known about the site, whilst one fifth (20%) had heard about it through word of mouth: this increases to just under a third of first time visitors (31%).

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

	Dalby 2015 %	Dalby 2012 %	All England 2015 %
Always known about it / been here before	48	57	53
Word of mouth	20	28	34
Leaflets	7	7	3
Forestry Commission website	6	*	4
Tourist Information Centre / Tourist Board	5	<1	2
Facebook	5	*	1
Google / other search engine	5	*	4
Just passing / en route	4	-	2
Map	2	-	1
Other websites	2	*	2
Newspaper	2	-	1

Base: All visitors – Dalby 2015 (246); Dalby 2012 (246); All England 2015 (1,762)

* Data not available

There were several other sources of information used by small numbers of visitors in 2015. These included:

- Smartphone app
- Natural Resources Wales website
- Magazines (unspecified)
- Twitter
- Sporting magazines (e.g. mountain biking)

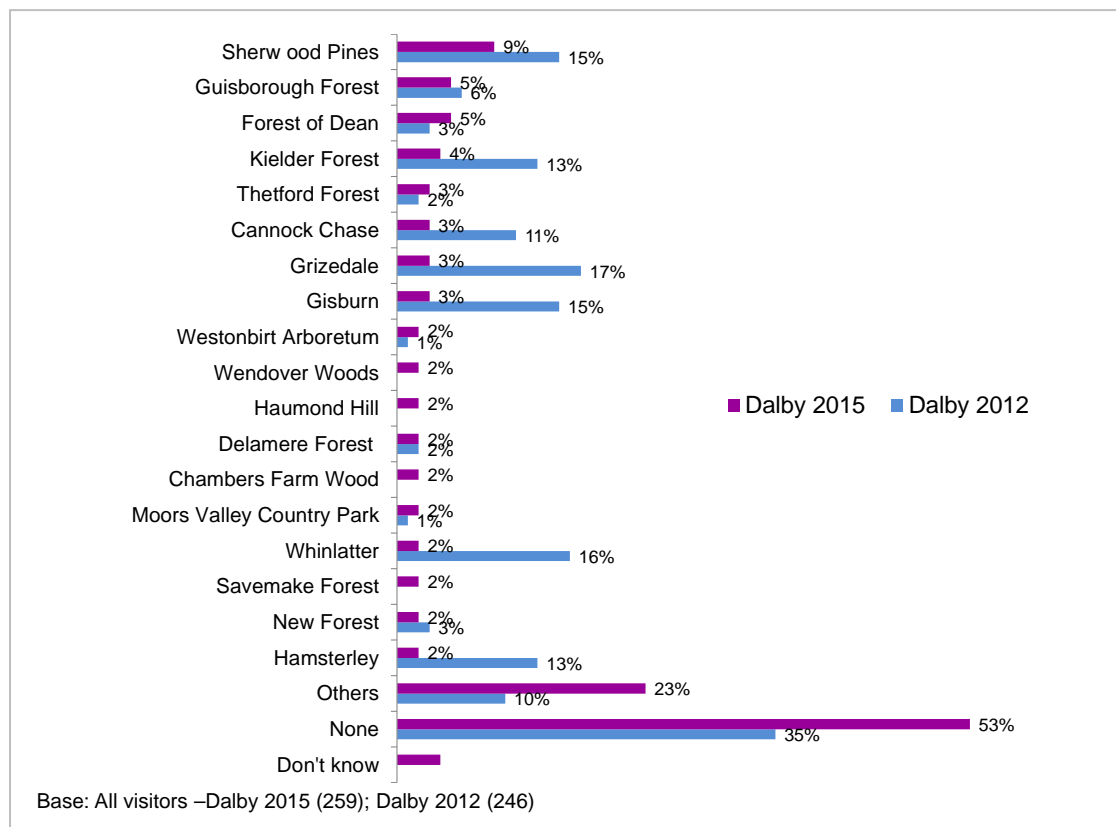
- Organised trip (with school / university)

7.2 Visiting other sites

Visitors to Dalby 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 (47%) had visited at least one other site, although in 2012, 65% had visited another site.

Sherwood Pines was mentioned by the highest proportion of visitors to Dalby (9%). This was followed by Guisborough Forest and the Forest of Dean, both being mentioned by 5%. Fewer than one in twenty Dalby 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
- Dalby Forest
- West Walk.

8. Discovery passes

8.1 Uptake and interest in season tickets and annual Discovery Passes

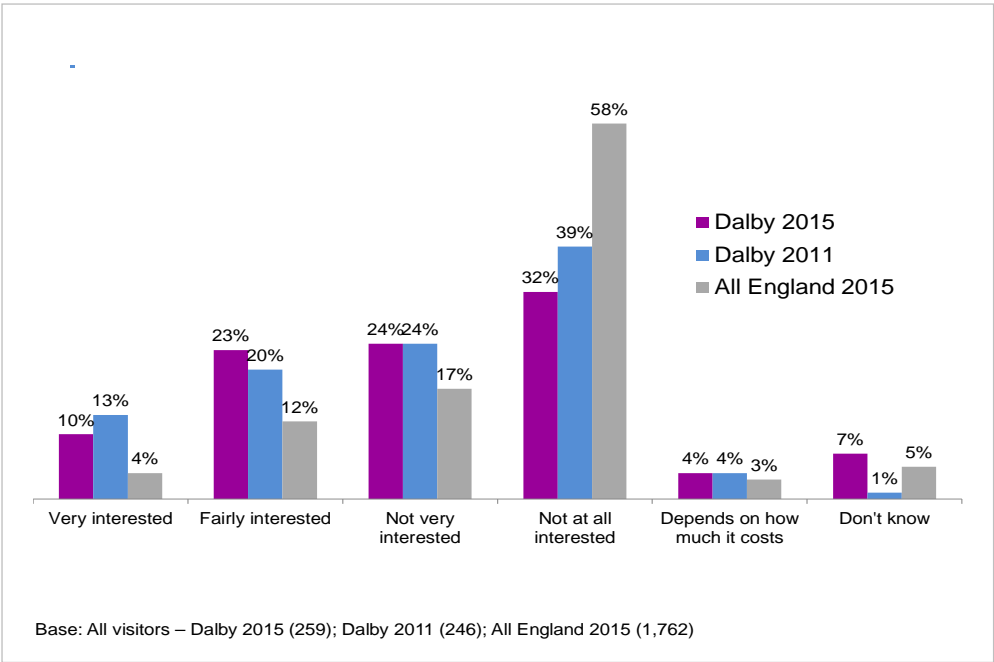
Just over one in ten (14%) of visitors to Dalby held a season ticket or annual Discovery Pass; this was similar to the all England average (13%) but was considerably lower than the proportion in the 2012 survey (24%).

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 Dalby on purchasing an Annual Discovery Pass were significantly higher than the all England average, with 33% saying they were interested (10% very interested and 23% fairly interested). Only 16% said they were interested at other England sites (4% very interested and 12% fairly interested). The levels of interest in purchasing a Discovery Pass in 2012 were similar to those at Dalby in 2015.


Most of the visitors interviewed were therefore not interested in purchasing an Annual Discovery Pass (63%) which was also true across all England sites in 2015 (75%).

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>B01326-3</u> <u>NRW / FCE</u> <u>Quality of Visitor Experience – Year 3</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

DALBY

ASK ALL

SHOWCARD G8

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

CODE ALL MENTIONED

		(105-108m)
A	Archery	3
B	Bike wash	7
C	Bus links	9
D	Café / restaurant / catering	A
E	Car parking	C
F	Cycle hire	E
G	Cycle trails	F
H	Disabled toilets	G
I	Easy / all ability access	H
J	Educational resources	I
K	Events	J
L	Forest drive	K
M	Forest Segway	L
N	Forest shop	M
O	Go Ape!	N
		(109-112m)
P	Gruffalo Trail	1
Q	Heritage site	2
R	Horse riding	4
S	Information available / interpretation	5
T	Mountain bike trails	7
U	Orienteering / Geocaching	A
V	Picnic areas / BBQ	C
W	Play areas and equipment	E
X	Toilets	K
Y	Viewpoint	M
Z	Visitor Centre	N
AA	Walking trails	O
		(113-116m)
BB	Wildlife viewing / activities	3

None of these

Don't know

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

Nothing

Don't know

(117-120m)

(121-124m)

M

N

DALBY

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 CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(125-128m)								
A	Archery	3	1	2	3	4	5	6	7	(142)
B	Bike wash	7	1	2	3	4	5	6	7	(146)
C	Bus links	9	1	2	3	4	5	6	7	(148)
D	Café / restaurant / catering	A	1	2	3	4	5	6	7	(149)
E	Car parking	C	1	2	3	4	5	6	7	(151)
F	Cycle hire	E	1	2	3	4	5	6	7	(153)
G	Cycle trails	F	1	2	3	4	5	6	7	(154)
H	Disabled toilets	G	1	2	3	4	5	6	7	(155)
I	Easy / all ability access	H	1	2	3	4	5	6	7	(156)
J	Educational resources	I	1	2	3	4	5	6	7	(157)
K	Events	J	1	2	3	4	5	6	7	(158)
L	Forest drive	K	1	2	3	4	5	6	7	(159)
M	Forest Segway	L	1	2	3	4	5	6	7	(160)
N	Forest shop	M	1	2	3	4	5	6	7	(161)
O	Go Ape!	N	1	2	3	4	5	6	7	(162)
		(129-132m)								
P	Gruffalo Trail	1	1	2	3	4	5	6	7	(164)
Q	Heritage site	2	1	2	3	4	5	6	7	(165)
R	Horse riding	4	1	2	3	4	5	6	7	(167)
S	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
T	Mountain bike trails	7	1	2	3	4	5	6	7	(170)
U	Orienteering / Geocaching	A	1	2	3	4	5	6	7	(173)
V	Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
W	Play areas and equipment	E	1	2	3	4	5	6	7	(177)
X	Toilets	K	1	2	3	4	5	6	7	(183)
Y	Viewpoint	M	1	2	3	4	5	6	7	(185)
Z	Visitor Centre	N	1	2	3	4	5	6	7	(186)
AA	Walking trails	O	1	2	3	4	5	6	7	(187)
		(133-136m)								
BB	Wildlife viewing / activities	3	1	2	3	4	5	6	7	(190)
		OTHERS (WRITE IN)								
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
	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

(235)

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

(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, DON'T KNOW OR REFUSED, TICK APPROPRIATE BOX

ITEMS	£	Nothing	DK	Ref.	
Food and drink		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(237-240)
Activities available at this site		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(241-244)
Parking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(245-248)
Souvenirs / gifts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(249-252)
Hiring equipment such as boats, bikes or horses		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(253-256)
Anything else		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(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, DON'T KNOW OR REFUSED, TICK APPROPRIATE BOX

ITEMS	£	Nothing	DK	Ref.	
Food and drink		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(261-264)
Accommodation (if staying overnight)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(265-268)
Admission to other attractions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(269-272)
Parking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(273-276)
Transport, including public transport, taxis and petrol		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(277-280)
Souvenirs / gifts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(281-284)
Hiring equipment such as boats, bikes or horses		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(285-288)
Anything else		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(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

(415)

Male

1

Female

2

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

(416)

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 M

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

(417)

SINGLE CODE

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.)

(418)

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?	(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)
B01326-3	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.

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