

beaufortresearch

30 years of intelligent research

Research Report

Quality of the Visitor
Experience 2014

Delamere



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 Delamere	1
1.3 Perceptions of the site	2
1.4 Strengths of the site	2
1.5 Areas for improvement.....	3
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.....	12
4.2 Visitor origin	13
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	23
5.1	Overall rating of the site as a place to visit.....	23
5.2	Overall rating of the site as safe and welcoming.....	24
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.....	30
6.	Site facilities	32
6.1	Importance of site facilities.....	32
6.2	Facilities used	35
6.3	Rating of site facilities	36
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 246 visitor interviews conducted at High Lodge Thetford 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 Delamere

Delamere, located on the Cheshire Plain, is Cheshire's largest area of woodland and is a haven for wildlife, including the beautiful small tortoiseshell butterfly, greater spotted woodpecker, white faced darter dragonfly, green woodpecker, siskin and southern hawker dragonfly.

Delamere also hosts live music events, and a range of learning activities for children.

1.3 Perceptions of the site

Perceptions of Delamere as a place to visit were very positive. This was also the case across all England sites and was found in the previous study conducted in 2011. In fact nobody interviewed at Delamere in 2014 gave a negative rating of the site.

Two in five rated the site as 'excellent' (40%): however, this was slightly lower than the all England findings (43%) and the previous study conducted at Delamere in 2011 (48%).

Similarly, ratings of how safe and welcoming Delamere was were very positive. This was also the case across all England sites, and was found in the previous study in 2011. Only a very small proportion of visitors interviewed at Delamere gave a negative rating of the site in terms of it being safe and welcoming. Two in five visitors gave this measure an 'excellent' rating (40%): while this is in line with the all England average (43%), however the proportion rating the site as excellent has reduced from 52% in 2011.

When asked whether they would be likely to recommend Delamere as a place to visit to a friend or relative (using a score of 0-10), scores for Delamere and all England sites generally were extremely positive: only 2% gave a rating of less than 8/10 for Delamere, and 4% less than 8/10 for all England sites. This was reflected in the mean scores, with Delamere 2014 standing at 9.7, compared with Delamere 2011 at 9.1 and all England at 9.4.

1.4 Strengths of the site

Two favourite things about Delamere stood out. These were the peace and tranquillity of the site, and the scenery / views, both mentioned by around three in five visitors (62% and 60% respectively). For both of these aspects, the number of visitors mentioning them has increased significantly since 2011 (21% and 38% respectively) and these proportions are also higher than the corresponding all England figures (36% and 39% respectively).

Around half (48%) said that they liked the walks, paths and trails at Delamere (up from 40% in 2011), while a third mentioned liking the fresh air and being outside (32%) – this figure has more than doubled since 2011 (15%).

1.5 Areas for improvement

Around a third of visitors to Delamere could not think of anything that would add to their enjoyment and only made positive comments (35%). However, this was lower than the all England average of 44%.

Most suggestions to improve the site were made by relatively small numbers of visitors. Saying that, there were two improvements in particular that were mentioned by relatively high numbers: these were better parking (22%) and improved signage and maps (13%).

There were calls by small minorities for:

More activities for children / more play areas	(8%)
More bins / litter bins / recycling bins / less litter	(7%)
Improve café / catering	(5%)
More dog poo bins / remove dog poo	(5%)
Improve toilets / more toilets / shower facilities / changing area	(4%).

1.6 Visitor profile

The majority of visitors to Delamere had visited the site before (80%). This proportion was higher than the all Wales average of 76% who said they had been to their respective forest sites before.

Eight out of ten of the visitors to Delamere had travelled for less than three hours to get there (83%).

The gender profile of visitors to Delamere was predominantly male (60% of visitors were men compared with 40% women). The gender split for all England sites was more even (48% males vs. 52% females).

In terms of the age profile, there was a fairly even split between younger and older visitors: roughly half were aged under 45 years (56%), while 44% were aged over 45 year. This age profile was fairly consistent with the age profile of visitors to all sites in England.

Delamere visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 73%) than C2DE (skilled and unskilled manual workers, unemployed = 27%) – this was also the case for all England sites (71% ABC1, 28% C2DE).

Just over half (52%) of Delamere visitors had children in the household, which was very similar to the all England figure (54%).

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 Delamere, interviewing took place between 29th March and 12th September, and a total of 240 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken Delamere 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 Delamere. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in England in 2014.

The profile of visitors to Delamere was largely in line with that of the visitors to all the England sites.

The gender profile was predominantly male (60% of visitors were men compared with 40% women), whereas the gender split for all England sites was more even (48% males vs. 52% females).

In terms of the age profile, there was a fairly even split between younger and older visitors: roughly half were aged under 45 years (56%), while 44% were aged over 45 year. This age profile was fairly consistent with the age profile of visitors to all sites in England.

Delamere visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 73%) than C2DE (skilled and unskilled manual workers, unemployed = 27%) – this was also the case for all England sites (71% ABC1, 28% C2DE).

Just over half (52%) of Delamere visitors had children in the household, which was very similar to the all England figure (54%).

The overwhelming majority of visitors to Delamere were white British / Welsh / Irish (95%), 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

		Delamere %	All England %
Gender	Male	60	48
	Female	40	52
Age	16 - 24	4	5
	25 - 34	18	21
	35 - 44	34	35
	45 - 54	24	20
	55 - 64	12	11
	65+	8	8
Social class	AB	43	40
	C1	30	31
	C2	19	18
	DE	8	10
	Refused	-	1
Working status	Full-time employee (30+ hours per week)	70	59
	Part-time employee (<30 hours per week)	10	17
	Self-employed	4	5
	Full-time education	2	2
	Unemployed	-	1
	Permanently sick / disabled	<1	<1
	Retired	11	10
	Looking after home	2	5
	Other	-	<1
	Refused	-	<1
Limiting illness	Yes – limited a lot	2	2
	Yes – limited a little	3	4
	No	95	92
	Refused	-	1
Children in household	Yes	52	54
	No	48	46
	Refused	-	<1
Ethnicity	White – British / Welsh / Irish	95	96
	White – Other	3	3
	Black / Asian / Mixed	1	1
	Refused	-	<1

Base: All visitors – Delamere (240); All England (1,654)

3.2 Group profile

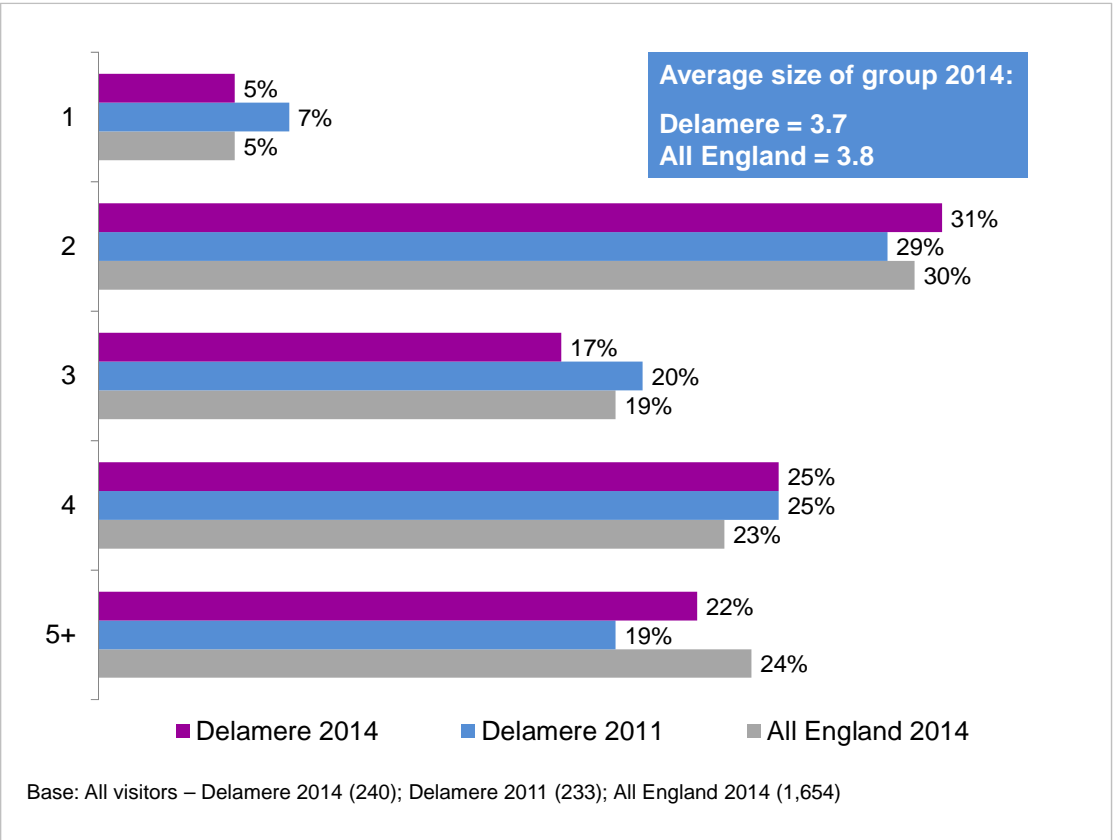
3.2.1 Size of group

Group sizes were slightly smaller at Delamere (averaging 3.7 people), compared to the all England sample (which averaged 3.8 people).

A third of visitor groups (31%) were made up of two people. This was in line with the previous Delamere research in 2011 (29%) and the all England average (30%).

A quarter of visitor groups were made up of four people (25%), again in line with the previous research (25%) and the all England average (23%), with a further one in five being larger groups made up of five or more people (22%). Therefore, there is little variation in the data from both surveys.

Figure 1: Q1. Total size of the group

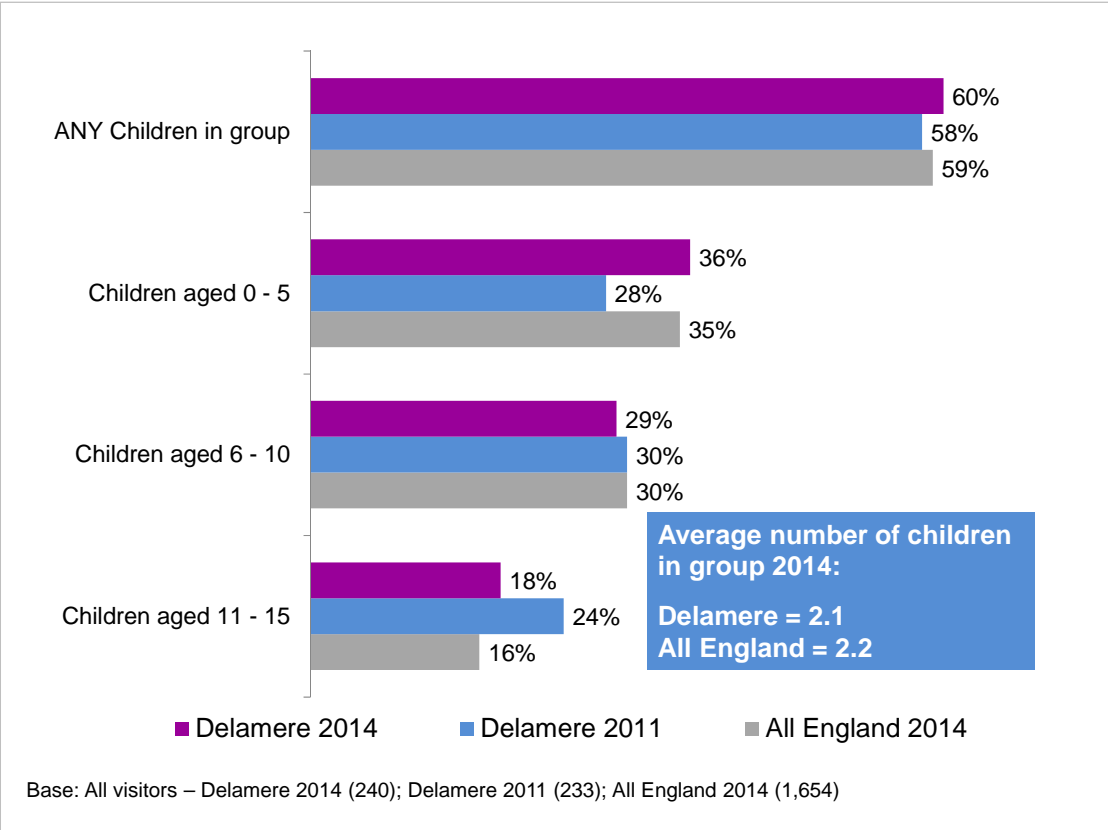


3.2.2 Composition of group

The majority of the groups who visited Delamere contained children (60%). This was in line with the all England average (59%) and the previous Delamere study conducted in 2011 (58%). The average number of children per group visiting Delamere in 2014 was consistent with the all England average (mean of 2.1 children per group at Delamere compared with 2.2 overall).

The ages of children in the groups were consistent with the 2011 research 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

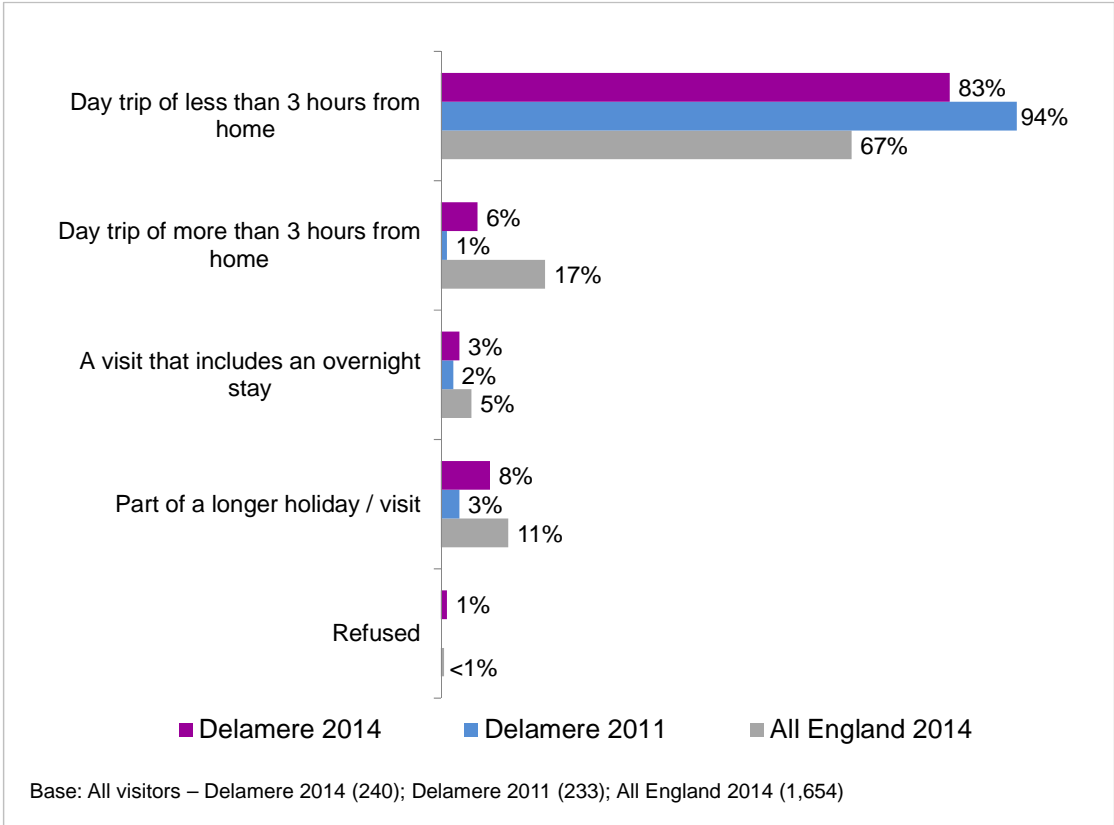
4.1 Type of visit

The vast majority of the visitors to Delamere travelled for less than three hours to reach the site and intended to stay for the day rather than overnight (83%). This proportion was somewhat lower than that seen in the previous research (where 94% were day trippers travelling less than 3 hours), but higher than the all England average (67%).

Compared to the 2011 research findings, in 2014 a larger proportion of visitors travelled for more than 3 hours as a day trip to Delamere (6% vs. 1%), but this figure was smaller than the all England average (17%).

Given that 83% of visitors to Delamere were day trippers, those staying overnight or as part of a longer holiday / visit only amounted to 11% of the sample, slightly higher than was seen in the previous research (5%) but lower than the all England average (16%).

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.

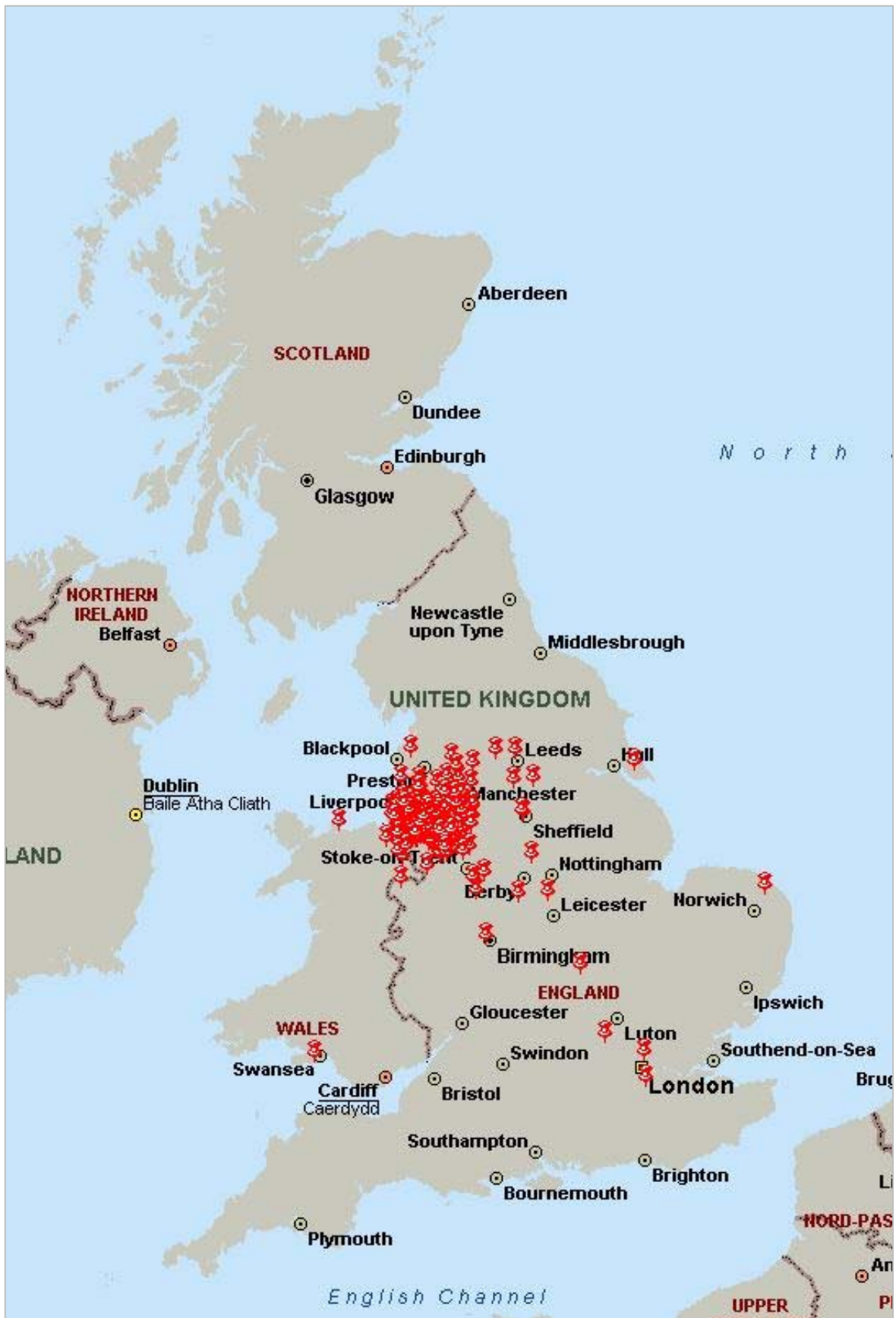
The vast majority of the visitors to Delamere came from within England (96%), most of whom travelled from North West England (86%): this was a much higher percentage than the all England average (21%). Most of the other visitors to the site came from other areas of England (10%), with only a small proportion visiting from Wales (3%), the rest of the UK (<1%) or abroad (<1%) - Table 3 below and Figure 4 overleaf provide more details.

Table 3: Q28b. Visitor origin 2014

		Delamere	All England
		%	%
Home region	North East England	-	14
	Yorkshire & Humberside	4	3
	North West England	86	21
	West Midlands	4	3
	East Midlands	1	13
	East of England	<1	14
	Greater London	<1	1
	South East England	<1	19
	South West England	<1	9
Home nation	England	96	97
	Wales	3	1
	Rest of UK	<1	<1
	Abroad	<1	1

Base: All visitors – Delamere (240); All England (1,654)

Figure 4: Map of visitor origin for Delamere



4.3 Frequency of visits

4.3.1 First-time visitors

In 2014 only 20% of visitors to Delamere were first-time visitors (similar to the 2011 figure of 18%). This proportion was less than the all England average of 24% who said they had never visited their respective forest sites before. Therefore there were slightly more repeat visitors at Delamere (80%) compared to all England sites (76%).

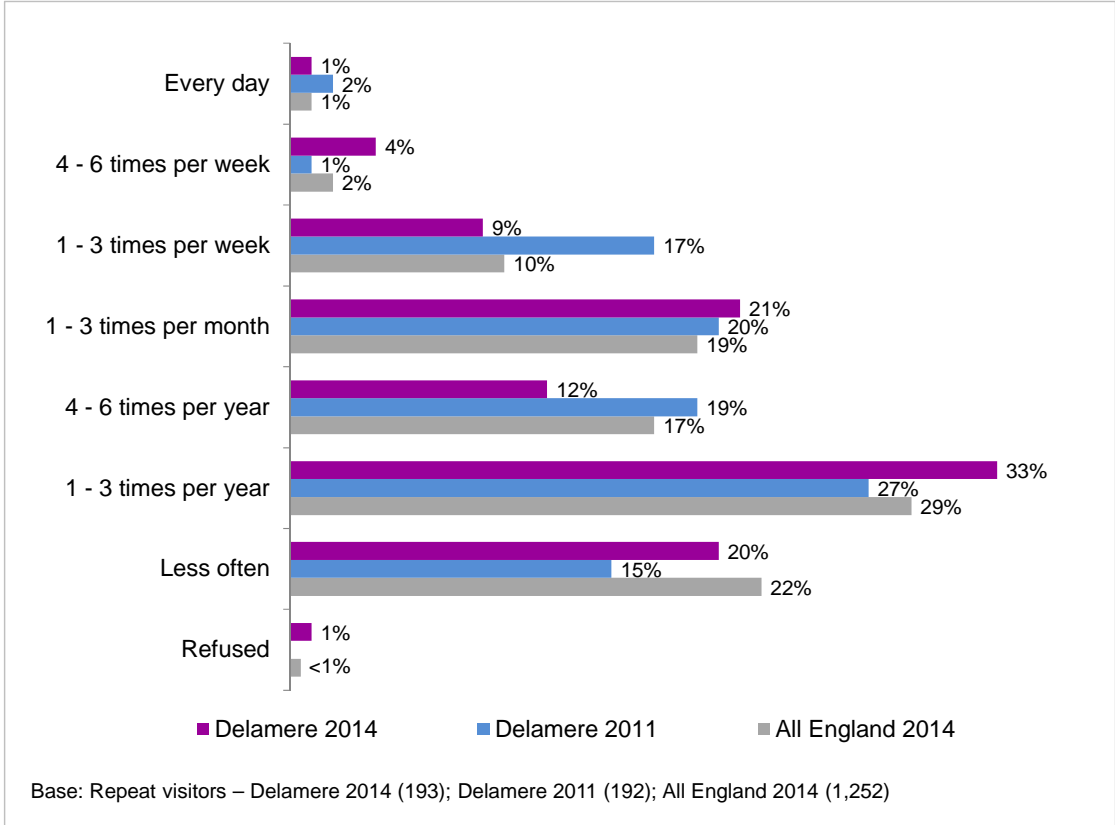
4.3.2 Repeat visitors

Focussing on repeat visitors, it can be seen that most were infrequent visitors, who visited Delamere 4-6 times a year or less often.

These infrequent visitors accounted for 65% of repeat visitors in 2014, compared to the 2011 figure of 61% and an all-England average of 68%.

Frequent visitors coming to the site once a week or more often accounted for 14% of the sample, which was lower than was seen in the previous research (20%) but in-line with the all England average (13%).

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



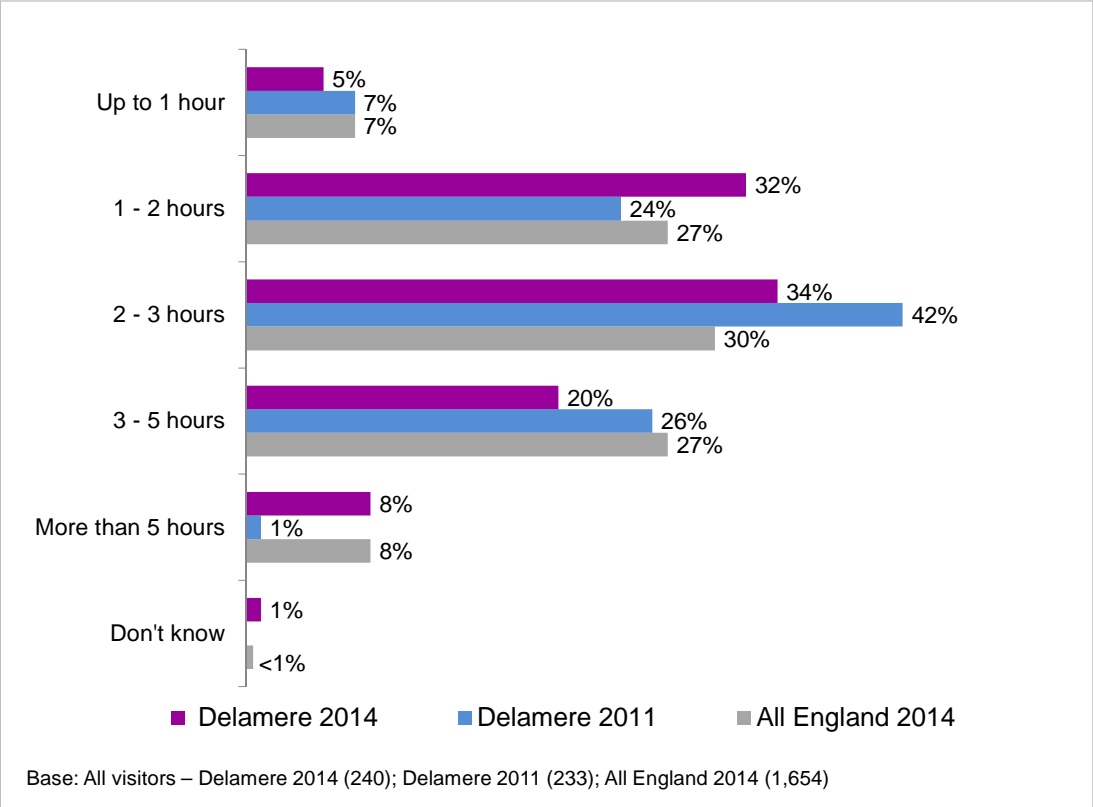
4.4 Length of visit

Visitors to Delamere were at the site an average of 9 minutes longer in 2014 than in 2011. In 2011 the average length of visit was 2 hours and 32 minutes, whilst in 2014 it was 2 hours and 41 minutes. The average length of stay across all sites in England sites was 2 hours and 48 minutes.

The changing lengths of time visitors spent at Delamere can be seen below. Although smaller proportions reported to be spending between 2-5 hours at the site (54% compared to 68% in 2011), the average time spent at Delamere was increased by the larger proportion staying at the site for more than 5 hours (8% in 2014 compared to 1% in 2011).

On the whole, the data is comparable to that seen across all England sites.

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 Delamere was walking generally (73%): this was slightly higher than the all England average (68%) and the 2011 figure (67%). At Delamere, as with other England sites, using sign-posted trails was the most popular mode of walking (48% vs. 47% all England).

Another popular activity at Delamere was using the café / restaurant / other catering (60%): participation in this activity has doubled since 2011 (30%). Having a picnic or barbeque was mentioned by a fifth of visitors (19%, up from 11% in 2011), while one in ten (12%) mentioned admiring the views (down from 17% in 2011).

Cycling was mentioned by a quarter of visitors to Delamere (25%): while this is in line with the all England average (28%), it has decreased from 36% in 2011. Using the tracks and trails continued to be the most popular mode of cycling (19% in 2014 compared to 24% in 2011).

There were several activities mentioned in 2014 that were not mentioned in the previous research. These included:

- | | | |
|----------------------------------|---|-----|
| • Go Ape! | - | 10% |
| • Seeing something in the forest | - | 7% |
| • Gruffalo Trail | - | 6% |
| • Using the play area | - | 5% |
| • Camping | - | 3% |
| • Orienteering / Geocaching | - | 2% |
| • Nature / natural history visit | - | 2%. |

The vast majority of visitors took part in 'active' activities (90%): this proportion is identical to the all England figure (90%) but much higher than the 2011 figure (61%) – see Table 4 overleaf.

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

	Delamere 2014 %	Delamere 2011 %	All England 2014 %
Cycling on forest roads, tracks or trails	19	24	17
Cycling off trails or tracks	11	19	18
TOTAL CYCLING	25	36	28
Walking on a sign-posted trail	48	42	47
Walking but not following sign-posts	18	18	17
Dog walking	21	24	16
TOTAL WALKING	73	67	68
Using the café / restaurant / other catering	60	30	58
Picnic or barbeque	19	11	16
Admiring the views	12	17	12
Go Ape!	10	-	8
Using the Visitor Centre / shop	8	5	11
Seeing something in the forest	7	-	5
Gruffalo Trail	6	-	5
Using the play area	5	-	28
Photography	5	1	4
Running / jogging	4	3	2
Camping	3	-	1
Bird watching	3	1	4
Orienteering / Geocaching	2	-	1
Nature / natural history visit	2	-	2
Other	6	8	2
Taken part in ACTIVE activities	90	61	90

Base: All visitors – Delamere 2014 (240); Delamere 2011 (233); 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 actually 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 Delamere lasted 2 hours and 41 minutes on average. Those walking spent an average of 1 hour and 48 minutes doing this; a small 5 minutes increase on the 2011 average of 1 hour and 43 minutes.

Over half of these visitors walked for around 1-2 hours (54%), while a third went walking at Delamere for 2 hours or more (33%).

The average time spent cycling at Delamere in 2014 was slightly higher than the average walking time (1 hour and 53 minutes): this has decreased slightly from 1 hour and 58 minutes in 2011. Three in five of these visitors (58%) spent 1-2 hours cycling, while three in ten (31%) cycled for 2 hours or more.

Table 5: Q5/Q6. Time spent taking part in walking at Delamere (Actual respondents only)

	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	1	5	5	2	2
31 – 60 minutes	4	6	8	21	8	8
1 – 2 hours	32	24	54	39	58	47
2 – 3 hours	34	42	28	29	21	28
3 – 5 hours	20	26	4	6	10	10
5+ hours	8	1	1	-	-	-
Don't know	1	-	-	-	-	4
AVERAGE	2 hrs 41 mins	2 hrs 32 mins	1 hr 48 mins	1 hrs 43 mins	1 hr 53 mins	1 hr 58 mins

Base: All respondents - 2014 (240); 2011 (233)
 Respondents who walked - 2014 (168); 2011 (151)
 Respondents who cycled – 2014 (48); 2011 (75)

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

Visitors to Delamere 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. The figures seen in Figure 7 show the figures calculated by combining the data across all types of intended spending.

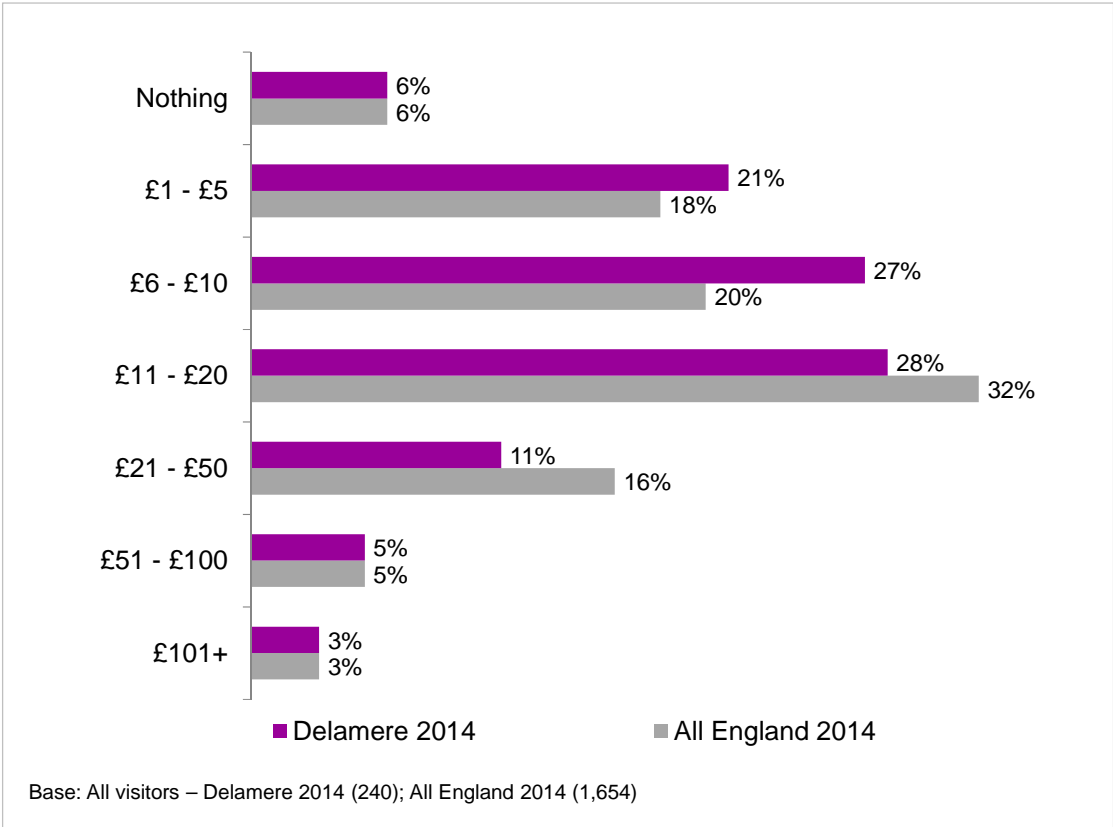
Please note that due to a change in the administering of this question, comparisons with 2011 spend was not possible.

Only a small proportion of the visitors interviewed (6%) said that they did not intend to spend money at the site during their visit – this was identical to the all England figure of 6%.

Around a fifth said they intended to spend up to £5 at the site (21%), while around a quarter would be spending either £6 - £10 (27%) or £11 - £20 (28%). Another fifth (19%) intended to spend more than £20 at the site. The average intended spend was £18.07 (compared to £20.81 for all England).

The data for Delamere was, on the whole, comparable to the all England data.

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 Delamere were likely to spend anything on was food and drink, with four in five (80%) planning to spend on this. The average planned spend on food and drink was £7.90, slightly less than the all England average of £8.48.

Another area of spend at the site was parking; two thirds of visitors (62%) were likely to spend an average of £3.29 on this: this was again lower than the all England average spend on parking of £4.22.

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.

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

	% spending anything on items		Average spend on items £	
	Delamere %	All England %	Delamere £	All England £
Food and drink	80	74	£7.90	£8.48
Activities at the site	6	8	£3.59	£4.61
Parking	62	75	£3.29	£4.22
Souvenirs / gifts	2	5	£0.24	£0.55
Hiring equipment	2	4	£0.65	£1.60
Anything else	3	4	£2.44	£1.56

Base: All visitors – Delamere 2014 (240); All England 2014 (1,654)

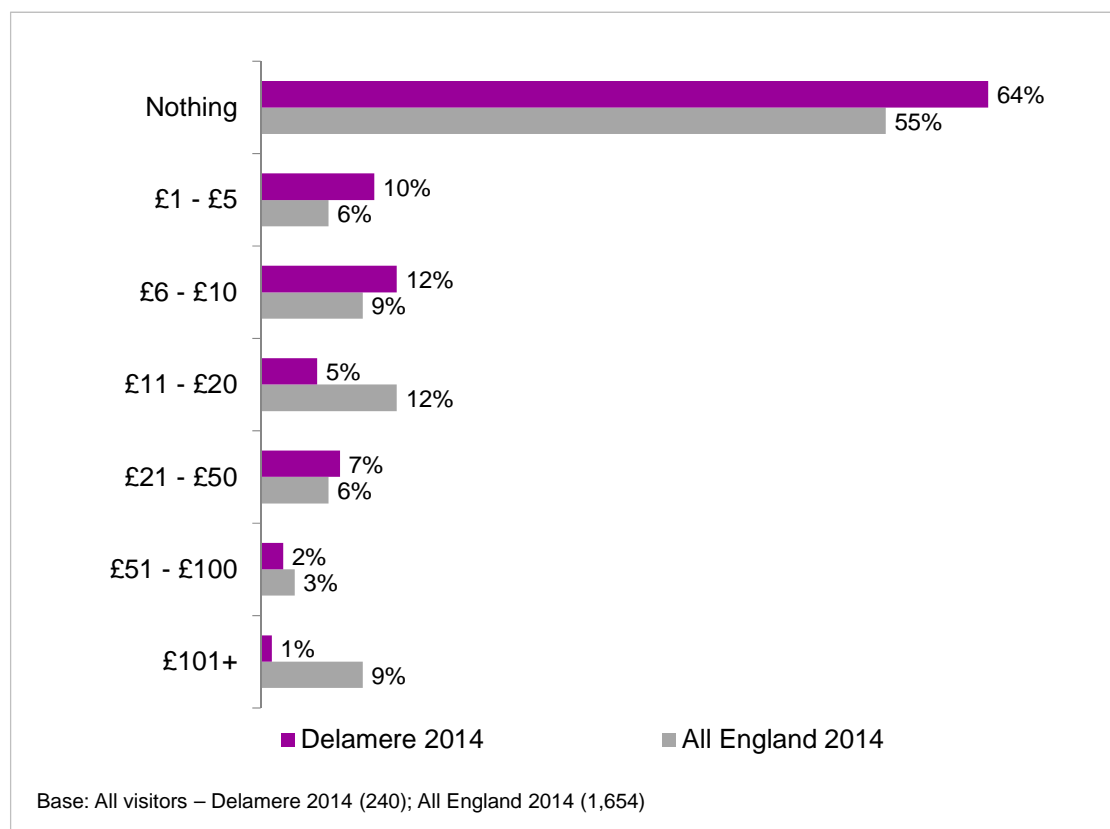
Visitors to Delamere were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Figure 8 show the figures calculated by combining the data across all types of spending. Again, 2011 comparisons have not been made due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

Around two thirds (64%) of visitors to Delamere said that they would not be spending any money in the local area as a result of their trip: this was in line with the all England average of 62%.

Most of the remaining visitors to Delamere intended to spend £1 - £5 in the area (22%), which was slightly higher than the all England average (15%). Only 15% of visitor to Delamere intended to spend more than £11 in the local area as a result of their visit (compared to 30% for all England sites).

The average intended spend in the area was £9.96: much lower than the all England average of £55.32.

Figure 8: Q18b. Average spend per person/group in local area – frequency of spending within each price range



Looking at types of intended spend in the local area as a result of their visit to Delamere, transport and food and drink were mentioned by the highest proportions of visitors (18% and 15% respectively) – there were significantly fewer visitors buying food and drink in the local area compared to those buying food and drink at the site (15% vs. 80%).

Visitors were likely to spend £1.45 on transport and £2.65 on food/drink (both average amounts were lower than the all England average amounts).

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

	% spending anything on items		Average spend on items £	
	Delamere %	All England %	Delamere £	All England £
Food and drink	15	32	£2.65	£15.87
Accommodation	4	9	£3.72	£31.25
Admissions to other attractions	1	3	£1.27	£1.44
Parking	6	25	£0.72	£1.79
Transport	18	16	£1.45	£3.63
Souvenirs / gifts	<1	4	£0.06	£1.36
Hiring equipment	-	2	-	£0.68
Anything else	<1	1	£0.01	£0.34

Base: All visitors – Delamere 2014 (240); All England 2014 (1,654)

5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

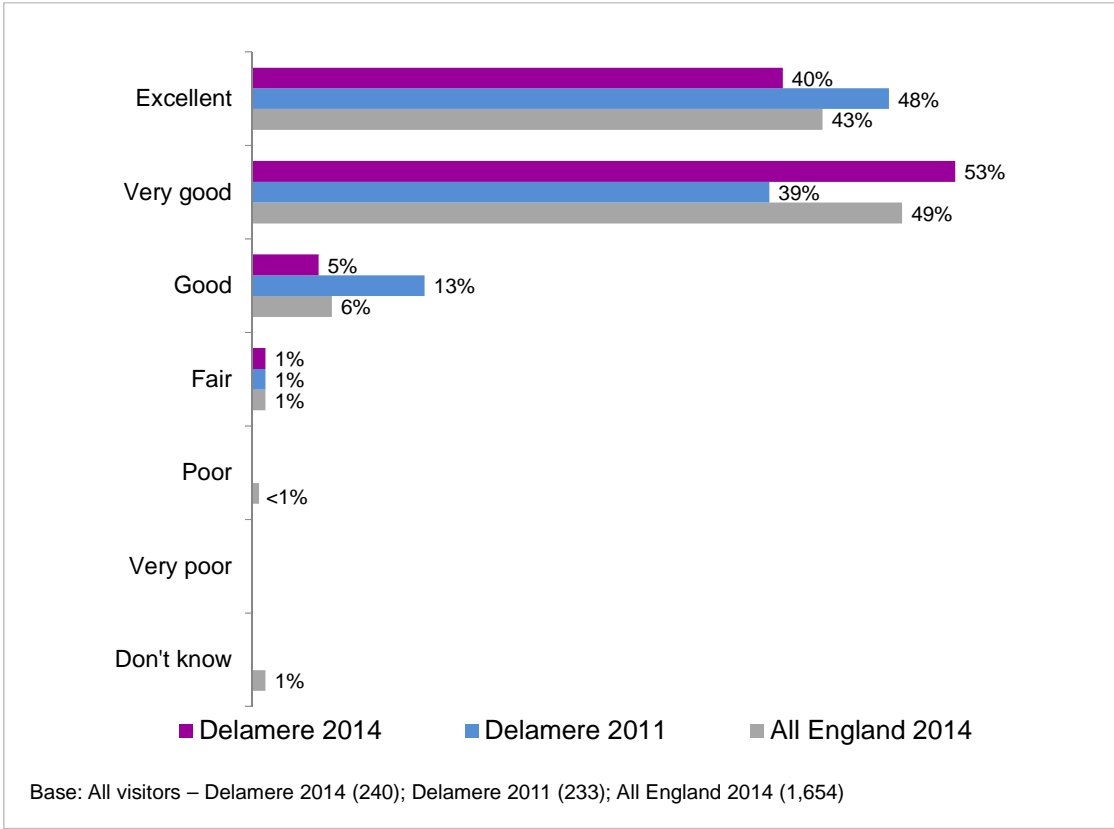
Perceptions of Delamere as a place to visit were very positive. This was also the case across all England sites and was found in the previous study conducted in 2011. In fact nobody interviewed at Delamere in 2014 gave a negative rating of the site.

Two in five rated the site as 'excellent' (40%); however, this was slightly lower than the all England findings (43%) and the previous study conducted at Delamere in 2011 (48%).

Over half (53%) gave the site a rating of 'very good': this increased from 39% in 2011 and is slightly higher than the all England average (49%).

A further 5% rated the site as good (13% in 2011), while 1% rated it as fair (identical to both the 2011 and the all England data).

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



Day-trip visitors were more likely to give an 'excellent' rating (41%) than staying visitors (32%), although this finding should be treated with some caution due to the small base size for staying visitors (25 individuals).

5.2 Overall rating of the site as safe and welcoming

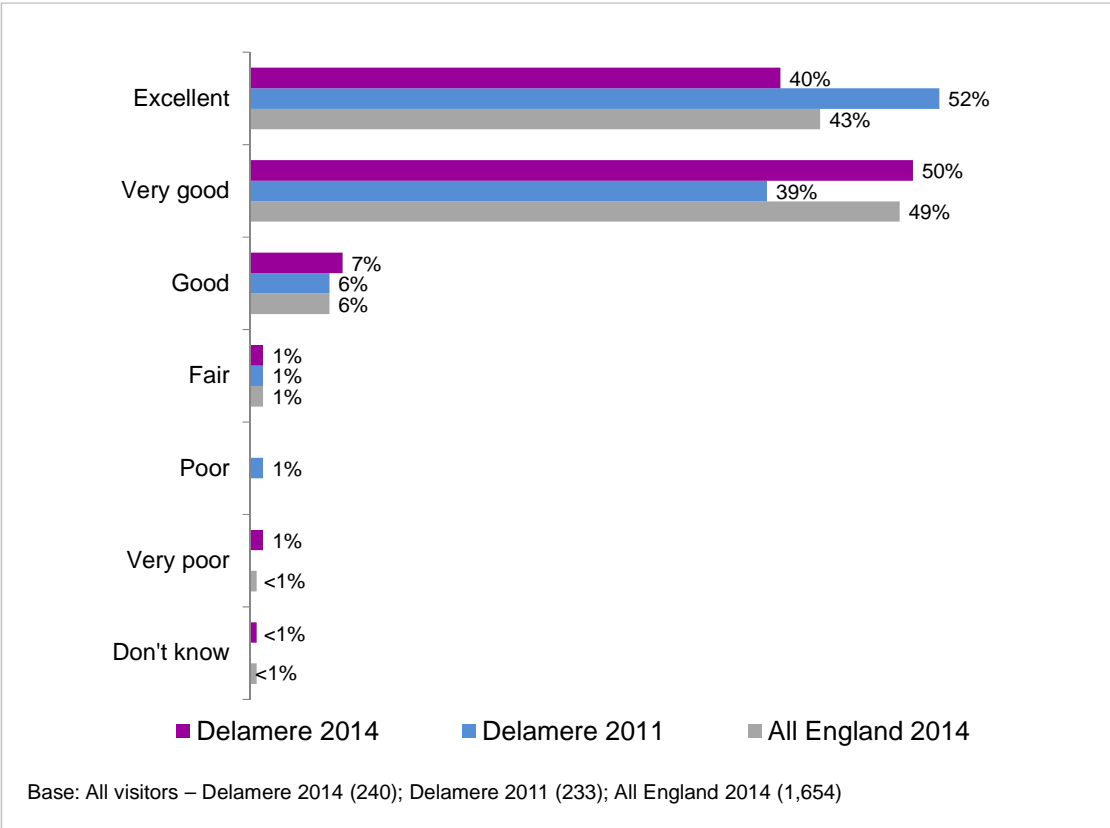
Similarly, ratings of how safe and welcoming Delamere was were very positive. This was also the case across all England sites, and was found in the previous study in 2011. Only a very small proportion of visitors interviewed at Delamere gave a negative rating of the site in terms of it being safe and welcoming.

Two in five visitors gave this measure an ‘excellent’ rating (40%): while this is in line with the all England average (43%), the proportion rating the site as excellent has reduced from 52% in 2011.

Half of visitors in 2014 gave a ‘very good’ rating (50%), again in line with the all England average (49%) but higher than 2011 (39%).

For the remaining points on the scale (fair, poor, very poor), there were only marginal changes in the data between the two surveys, and against the all England average.

Figure 10: Q11. Rating of the site in terms of how safe and welcoming it feels



Those visitors who were able to rate the site in terms of how safe and welcoming it felt were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the site.

Table 7 below details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Delamere and all England sites.

There were four aspects of the site that were mentioned by most of the visitors who gave a positive rating on 'safe and welcoming'. These were:

- The scenery / views / beautiful environment - 57%
- Fresh air / open space / plenty of space / freedom - 53%
- Peaceful / pleasant / tranquil / relaxing / welcoming - 52%
- Safe environment generally for all people - 48%.

The proportions of visitors mentioning each of these four aspects of the site has increased significantly since 2011.

A further quarter of these visitors commented on the site being a good, safe environment for children (23%): other comments were made by around one in ten visitors giving a positive rating and 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

	Delamere 2014 %	All England 2014 %
The scenery / views / beautiful environment	57	43
Fresh air / open space / plenty of space / freedom	53	37
Peaceful / pleasant / tranquil / relaxing / welcoming	52	32
Safe environment generally for all people	48	31
Good, safe place for the kids to play / run around	23	29
Clean / tidy / well maintained / litter free	8	10
Well signposted / good maps / info boards	7	7
Good quality facilities / amenities	7	11
Good provision of paths / trails and tracks	7	13
Well laid out / well organised / good set-up	6	12
Live locally / convenient / easy to get to / close	5	5
Friendly / helpful staff or rangers	3	4

Base: Visitors rating the site as excellent, very good or good – Delamere 2014 (234); All England 2014 (1,633)

Other comments made by small numbers of visitors included:

- Other visitors are friendly
- Go Ape!
- Dog friendly
- Good car parking
- Good café / good catering
- Plenty to do / has everything you want.

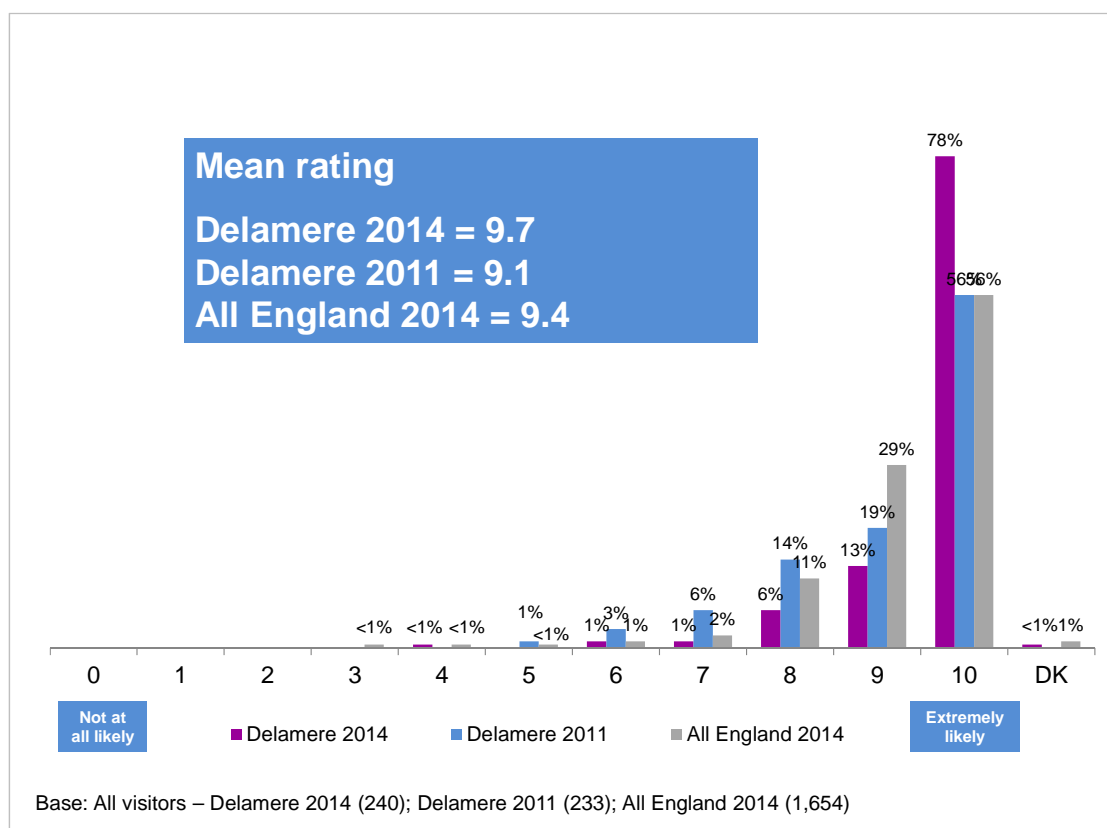
5.3 Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Delamere 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 Delamere and all England sites generally were extremely positive: only 2% gave a rating of less than 8/10 for Delamere, and 4% less than 8/10 for all England sites.

Four in five (78%) gave a rating of 10, which was considerably higher than both the previous Delamere study in 2011 and the all England score (56% for both). This was reflected in the mean scores, with Delamere 2014 standing at 9.7, compared with Delamere 2011 at 9.1 and all England at 9.4.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Delamere is 90, which is much higher (by 19 points) than the score of 71 seen in 2011 and higher than the all England score of 84.

5.4 Favourite things about the site

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

Two favourite things about Delamere stood out. These were the peace and tranquillity of the site, and the scenery and views, both mentioned by around three in five visitors (62% and 60% respectively). For both of these aspects, the number of visitors mentioning them has increased significantly since 2011 (21% and 38% respectively) and these proportions are also higher than the corresponding all England figures (36% and 39% respectively).

Around half (48%) said that they liked the walks, paths and trails at Delamere (up from 40% in 2011), while a third mentioned liking the fresh air and being outside (32%) – this figure has more than doubled since 2011 (15%).

A quarter of visitors said that they liked the site because it was close to home and convenient (24%), while a further one in five mentioned the cycle trails (20%) or that they felt the site was a safe environment (19%) - see Table 8 overleaf for more details.

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

Activities	Delamere 2014 %	Delamere 2011 %	All England 2014 %
Peace / tranquillity / relaxation / atmosphere	62	21	36
Scenery / views / beautiful / natural	60	38	39
Walks / paths / trails	48	40	39
Fresh air / being outside	32	15	23
Close to home / convenient location	24	16	13
Cycle trails / freedom / opportunity to cycle	20	16	22
Safe environment generally	19	12	11
Activities that are good for the children	15	5	27
Exercise / keeping fit	8	4	9
Like forests / trees / variety of trees and plants	6	8	14
Good on-site facilities / BBQ areas / gift shop	6	14	10
Clean / well looked after	6	12	6
Been before / wanted to come again	6	3	6
Wildlife / bird watching	5	7	5
Opportunity to spend time with family / friends	4	6	8
Lots to see and do	4	3	6
The weather	3	2	2
Helpful / pleasant staff	2	2	2
Cost / value for money / free	2	-	2

Base: All visitors – Delamere 2014 (240); Delamere 2011 (233); All England 2014 (1,654)

Other aspects of the site that were mentioned by small numbers of visitors included:

- Ideal for dogs / dog friendly
- Plenty / cheap / good parking
- Café / restaurant
- Well laid out / good layout
- Good toilets
- Site specific events
- Remote / away from traffic / no cars.

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

- Visitor groups including older children aged 11-15 years were much more likely to say that they liked the peace and tranquillity of the site (71%) compared to those with younger children aged 0-5 years (56%) or 6-10 years (62%)
- A higher proportion of first-time visitors said that they liked the scenery and views (68%) compared to repeat visitors (59%)
- Female visitors were much more likely to say that they liked the fresh air and being outside (43%) compared to male visitors (25%).

5.5 Suggested improvements to the site

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

Turning firstly to what would enhance their enjoyment of the site. Around a third of visitors to Delamere could not think of anything that would add to their enjoyment and only made positive comments (35%). However, this was lower than the all England average of 44%.

Most suggestions to improve the site were made by relatively small numbers of visitors, and Table 10 below outlines the comments that were made by 2% or more. Saying that, there were two improvements in particular that were mentioned by relatively high numbers: these were better parking (22%) and improved signage and maps (13%).

Around one in ten wanted more activities for children (8%) and more litter bins (7%). Improvements to the café / catering and more dog poo bins would enhance the enjoyment at Delamere for 5% of visitors.

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

	Delamere 2014 %	All England 2014 %
Nothing / general positive comments	35	44
Better parking (easier, cheaper, more, free)	22	17
Improve signage / more maps / better maps	13	7
More activities for children / more play areas	8	5
More bins / litter bins / recycling bins / less litter	7	5
Improve café / catering	5	6
More dog poo bins / remove dog poo	5	6
Improve toilets / more toilets / shower facilities / changing area	4	5
Improve maintenance of paths / cycle trails / better surfacing	3	2
More picnic areas / BBQ / picnic tables and chairs	3	2
More trails / paths / cycle tracks	3	4
More seating	2	2
Longer / more challenging trails, paths and cycle	2	2
Provide café / catering / refreshments	2	1

Base: All visitors – Delamere 2014 (240); All England 2014 (1,654)

Other potential improvements were given by small numbers of visitors:

- Restricted access for dogs
- Have a cashpoint / accept card payments
- Cheaper prices / cheaper café
- Plant more trees
- Longer opening hours (shop, café, main gates)
- Drinking water taps
- Better access (for disabled people).

When asked if there was anything that interfered with their enjoyment of their visit to Delamere over three quarters reported that nothing had interfered with their enjoyment (67%). This was in line with the all England average of 66%.

The comments made were mentioned by very small proportions, and Table 11 below details those made by 2% of the sample or more.

Poor weather was mentioned by the highest proportion of visitors (11%), followed by expensive car parking (8%). Smaller proportions commented on signs being unclear (5%), problems with the car park and issues with the toilets (3% for each).

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

	Delamere 2014 %	All England 2014 %
Nothing	67	66
Wet / raining / windy (poor weather)	11	7
Car park expensive / should be free parking	8	9
Signs unclear / need better signs / more maps	5	3
Problems with car parks (faulty machines, limited spaces)	3	2
Issues with toilets (not enough, closed, dirty etc.)	3	1
Too many cyclists / cyclists cutting-up walkers	3	1
Dog mess on the paths / in play areas	2	1

Base: All visitors – Delamere 2014 (240); All England 2014 (1,654)

Other comments made by one or two visitors included:

- Dogs off leads / running around / don't want dogs around
- Need more litter bins / recycling bins / too much litter
- Poor maintenance of the site (paths, fences, waterways)
- Need more shelters / sheltered picnic areas / picnic tables and benches
- Need more dog poo bins.

6. Site facilities

6.1 Importance of site facilities

Visitors were presented with a list of facilities available at Delamere 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 (63%): this figure was much higher than both the 2011 survey data (43%) and the all England average (47%) and reflects the fact that a high number of visitors took part in walking activities at the site (73%).

Two in five (42%) said that the café / catering were important to their decision to visit: this was more than double the figure for 2011 (20%) and significantly higher than the all England average (25%).

Toilet facilities on-site were important to a third of visitors (36%), again higher than the 2011 data (19%) and the all England data (20%). Another 36% of visitors mentioned the car park, which was higher than the all England average (20%) but in line with the 2011 findings (33%).

The importance of the cycle trails at the site has declined somewhat since 2011: 33% of visitors mentioned this in the previous research, while 23% mentioned this in 2014. This reflects the decrease in the proportion of visitors saying they had taken part in cycling activities at the site (25% in 2014 compared to 36% in 2011).

Other facilities that were important to visitors' decision to visit the site are outlined in more detail in Figures 12a and 12b overleaf.

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

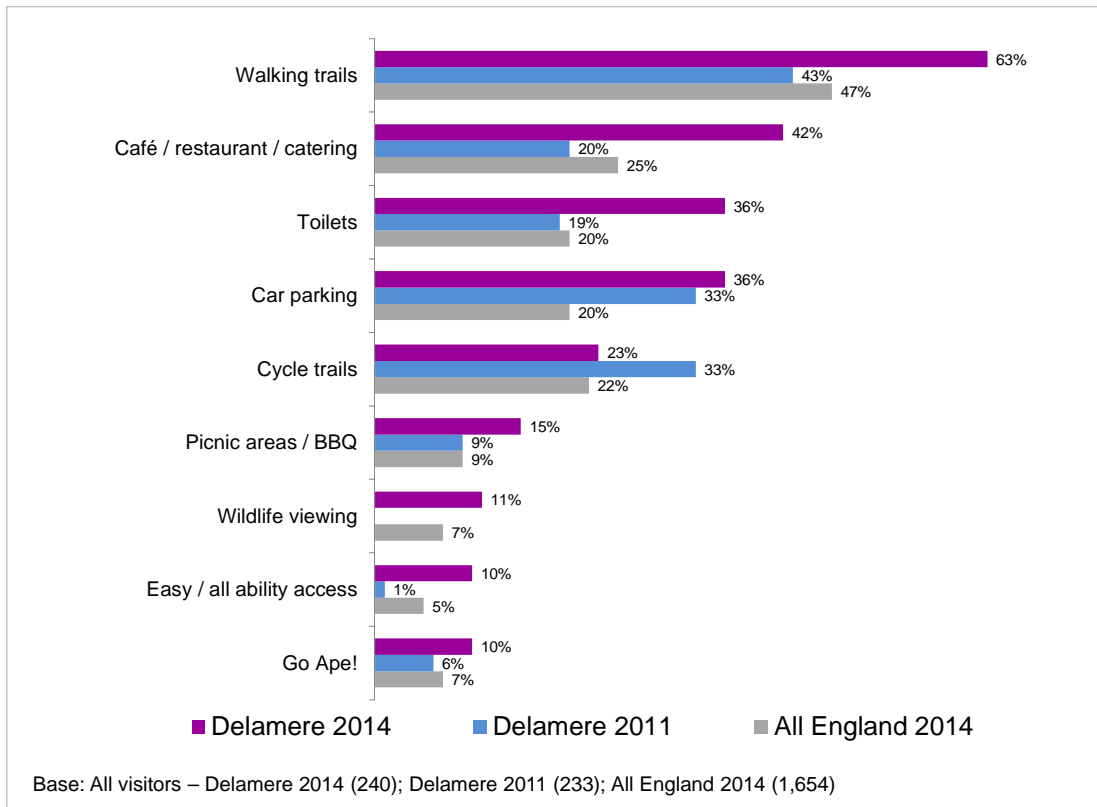
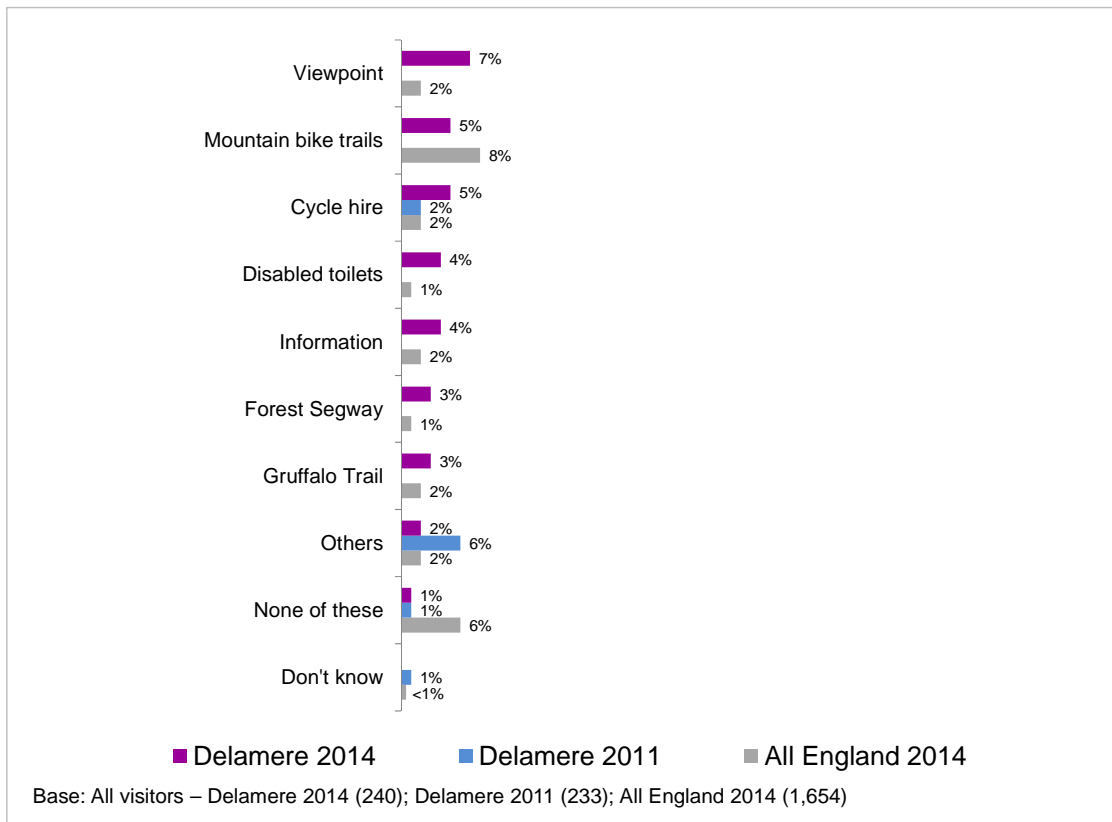


Figure 12b: Q13. Importance of different facilities in deciding to visit the site continued



Certain other factors (apart from site facilities) were important to around one in five visitors when choosing to come to the site (21%). Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

Other factors included the site being close to home and convenient (4%), having good facilities and being a good place for kids to run around and play (3%). Another 3% of visitors said that they came to the site for a nice day out, or that they wanted to go walking / cycling.

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

	Delamere 2014 %	All England 2014 %
Nothing	79	74
Close to home / local / convenient	4	3
Good facilities	3	2
A nice day out	3	2
Good for the children / can run around and play	3	4
Wanted to go walking / cycling	3	2

Base: All visitors – Delamere 2014 (240); All England 2014 (1,654)

Other factors mentioned by one or two visitors included:

- Good weather / sunny / warm
- Easy to find / get to (transport links, signposting etc.)
- Beautiful scenery / views / natural beauty
- Outdoors / fresh air / open spaces
- Close to where I am staying (staying visitors)
- Good value for money.

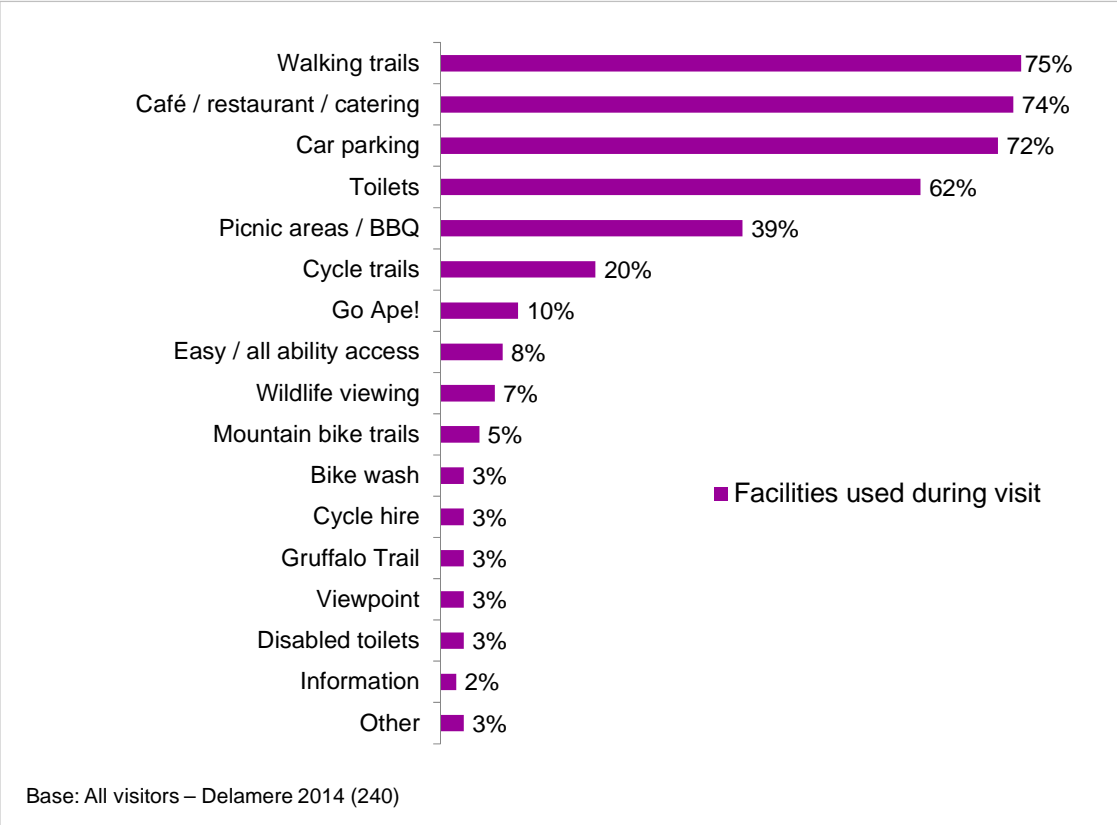
6.2 Facilities used

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

The facilities used reflect to a large extent visitors' views of the importance of facilities. Walking trails were used by the highest proportion of visitors (75%), closely followed by the café / restaurant / catering (74%) and car parking (72%).

Around two thirds of visitors used the toilets (62%), while just over a third used the picnic areas / barbeque. Cycle trails were used by a fifth of visitors (20%), while roughly one in ten used Go Ape! (10%) the easy, all ability access aspects of the site (8%) and wildlife viewing facilities (7%).

Figure 13: Q15a. Facilities used at Delamere 2014



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 Delamere 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, although these were used by a relatively small number of visitors. Around a third rated this facility as 'excellent' (31%) whilst most other users rated it as 'very good' (38%) or good (23%); therefore 92% gave a positive rating for this facility. Only small proportions rated the cycle trails as 'fair' (6%) or poor (2%).

The walking trails, used by most visitors, were rated as 'excellent' by 21%, and 'very good' by 40% of users. Just over a third rated them as 'good' (38%); therefore 99% of users positively rated the walking trails, with only a very small proportion giving a negative rating (1%).

A total of 95% of picnic area users gave this facility a positive rating, with 11% saying these were 'excellent' – no negative ratings were received.

While most users of the car park and toilets were positive about these facilities (67% and 83% respectively saying these were excellent, very good or good), these two facilities received the highest proportions of negative ratings. Roughly one in six rated the car park as 'poor' (14%), while 12% rated the toilets as 'poor' - see Figure 14 overleaf for more details of the ratings given for each facility.

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

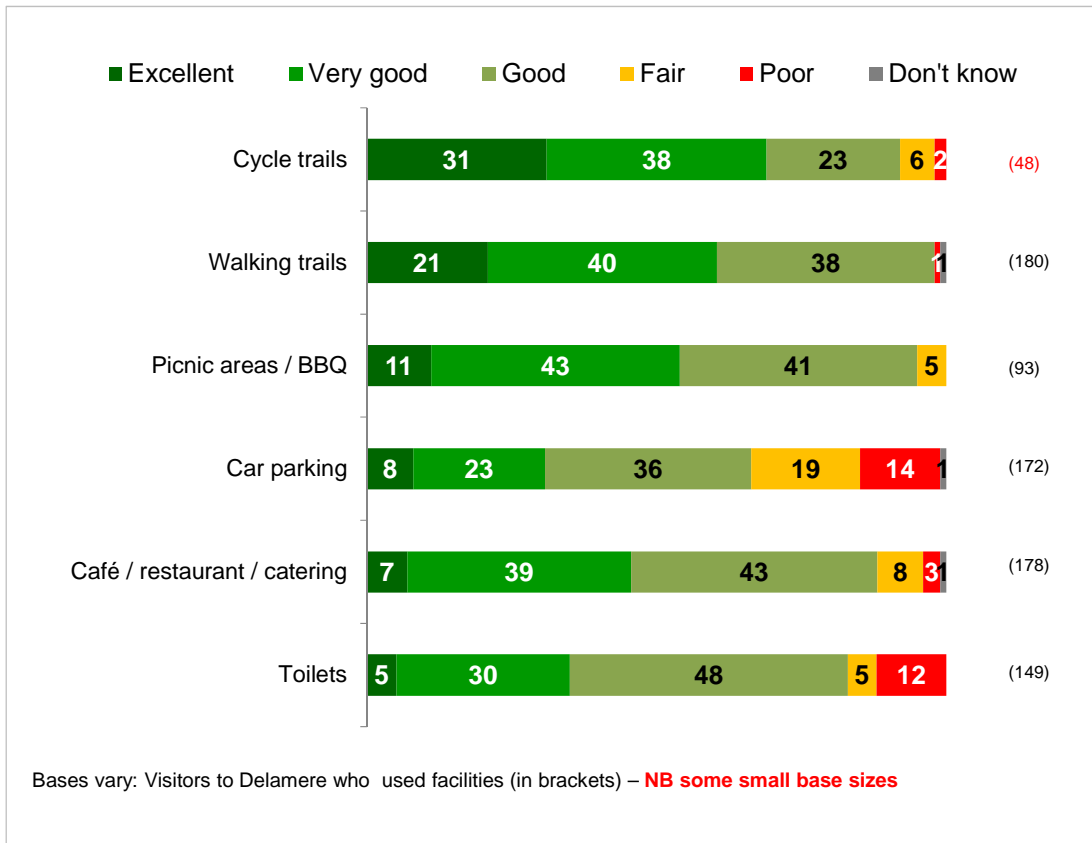


Table 12 compares the proportions giving ‘excellent’ ratings to the facilities used in 2014 compared to 2011, where they were mentioned in the previous survey.

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 proportions rating the car parking and the café / restaurant / catering as ‘excellent’ (16 and 11 percentage point decreases respectively). Cycle trails was the only facility to see an increase in the proportion rating this as ‘excellent’ (6 percentage point increase).

Table 12: Q15b – Proportions rating facilities at High Lodge Thetford as ‘Excellent’ 2014 vs. 2011

Facilities	Delamere 2014 %	Delamere 2011 %	% point change
Cycle trails	31	25	+6
Walking trails	21	28	-7
Picnic areas / BBQ	11	15	-4
Car parking	8	24	-16
Café / restaurant / catering	7	18	-11
Toilets	5	7	-2

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 Delamere 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.

Most visitors had always known about the site (75%): as would be expected, this proportion was much higher amongst repeat visitors (87%) compared to first-time visitors (30%), which was also the case in 2011 (86% repeat vs. 39% first-time).

Around one in five (18%) visitors to Delamere heard about the site through word of mouth, increasing to 40% amongst first-time visitors (41% of first-time visitors in 2011). Google and the Forestry Commission website were both mentioned by 3% of visitors, while 2% heard about Delamere through Facebook: none of these sources of information were mentioned in 2011.

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

	Delamere 2014 %	Delamere 2011 %	All England 2014 %
Always known about it / been here before	75	78	62
Word of mouth	18	15	28
Google / other search engine	3	-	5
Forestry Commission website	3	-	2
Facebook	2	-	1

Base: All visitors – Delamere 2014 (240); Delamere 2011 (233); All England 2014 (1,654)

There were several other sources of information used by small numbers of visitors in 2011 but not mentioned in 2014. These included:

- Road signs
- Local newspapers
- Tourist Information Centres / Tourist Board
- National newspapers
- Maps.

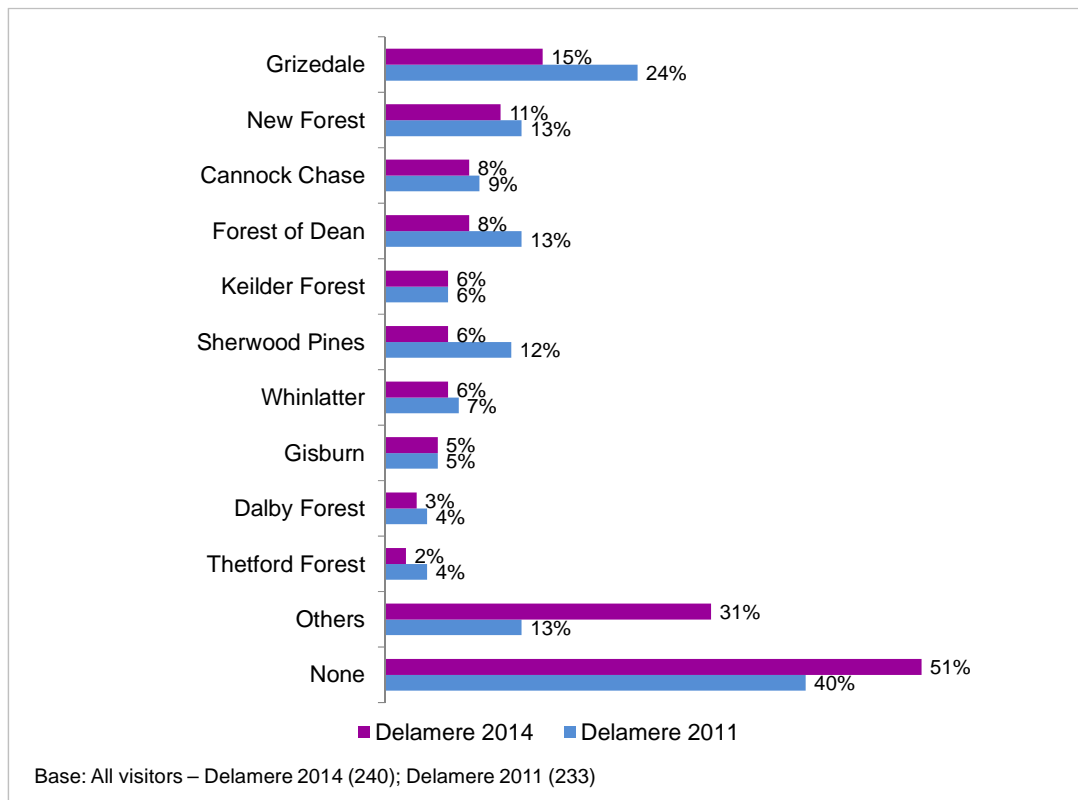
7.2 Visiting other sites

Visitors to Delamere were presented with a list of FCE managed forests and woodlands, and asked whether they had visited any of these other sites in the last 12 months. Around half (49%) had visited at least one other site, however more visitors to Delamere in 2011 had visited another forest site (60%).

Grizedale was mentioned by the highest proportion of visitors to Delamere (15%), although this has decreased from 24% in 2011. Another one in ten mentioned the New Forest (11%), Cannock Chase (8%) and the Forest of Dean (8%, down from 13% in 2011).

Overall, the pattern of visiting other sites has remained relatively unchanged since 2011, with the only other noticeable difference being seen for Sherwood Pines: 12% had visited this site back in 2011, compared to just 6% in 2014.

Figure 15: Other sites visited in the last 12 months



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

- Moors Valley Country Park
- Rosliston
- Alice Holt Forest
- Abbots Wood
- Bedgebury.

8. Discovery passes

8.1 Uptake and interest in season tickets and annual Discovery Passes

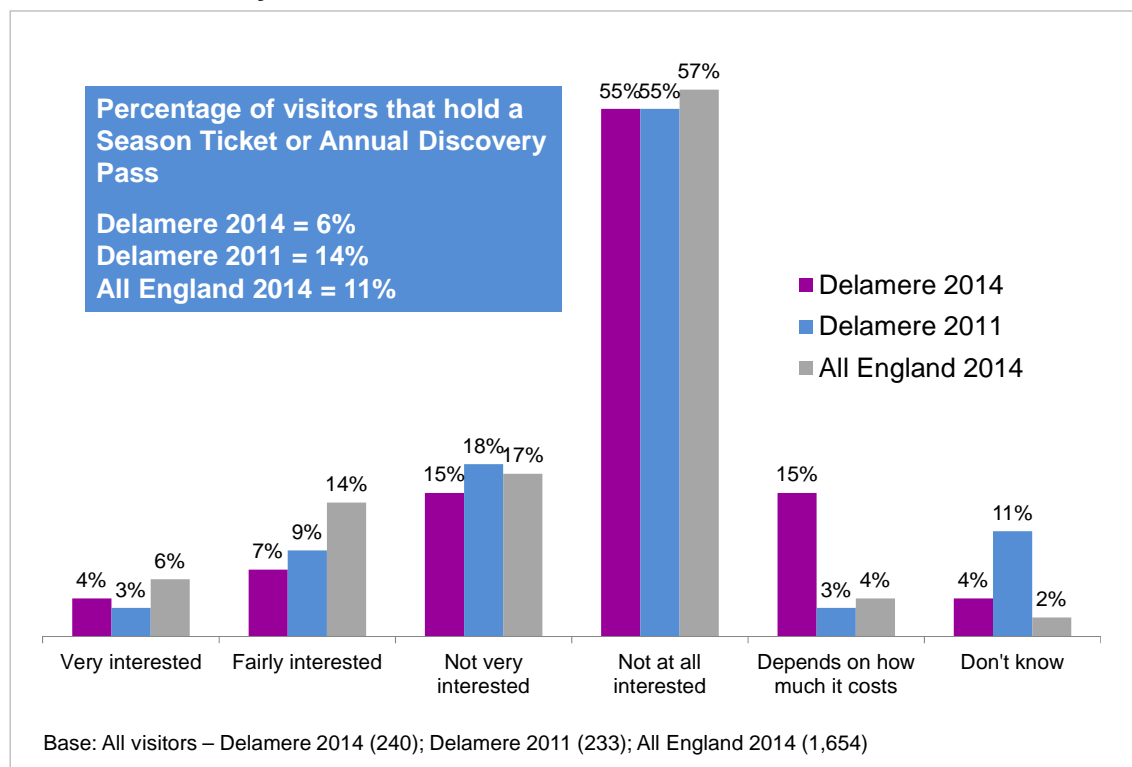
Around one in twenty visitors to Delamere held a season ticket or annual Discovery Pass (6%): this was lower than both the 2011 figure (14%) and the 2014 all England average (11%).

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 Delamere on purchasing an Annual Discovery Pass were relatively low, with just 11% saying they were interested (4% very interested and 7% fairly interested): around the same proportion of visitors were interested in a pass back in 2011 (12%). Across all England sites, levels of interest in purchasing a Discovery Pass were slightly higher; with one in five (20%) saying they were interested in buying one.


Most of the visitors interviewed, however, were not interested in purchasing an Annual Discovery Pass (70%): this was also the case in 2011 (73%) and 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</u> <u>Experience – Year 2</u> <u>FINAL</u>	FOR OFFICE USE ONLY		INTERVIEWER RECORD
				WEATHER CONDITIONS (3-6m) CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____
		Case No.	Point (1-2)	

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

ASK 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>	(55-58m)
<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>	(63-66m)
<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?
PROBE Anything else?
DO NOT PROMPT – CODE ALL MENTIONED
IF MENTIONS WEATHER, PROBE FOR MORE DETAILS

(75-78m)

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

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

Other (please specify)

(79-82m)

Nothing

L

Don't know

M

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

(83-86m)

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

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

DELAMERE

ASK ALL

SHOWCARD G9

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	Bike wash	4
B	Café / restaurant / catering	6
C	Car parking	7
D	Cycle hire	9
E	Cycle trails	A
F	Disabled toilets	B
G	Easy / all ability access	C
H	Forest Segway	F
I	Go Ape!	H
J	Horse riding	K
K	Information available / interpretation	M
L	Mountain bike trails	Q
		(109-112m)
M	Orienteering / Geocaching	3
N	Picnic areas / BBQ	5
O	Toilets	B
P	Viewpoint	D
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

DELAMERE

ASK ALL

SHOWCARD G9 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	Bike wash	4	1	2	3	4	5	6	7	(143)
B	Café / restaurant / catering	6	1	2	3	4	5	6	7	(145)
C	Car parking	7	1	2	3	4	5	6	7	(146)
D	Cycle hire	9	1	2	3	4	5	6	7	(148)
E	Cycle trails	A	1	2	3	4	5	6	7	(149)
F	Disabled toilets	B	1	2	3	4	5	6	7	(150)
G	Easy / all ability access	C	1	2	3	4	5	6	7	(151)
H	Forest Segway	F	1	2	3	4	5	6	7	(154)
I	Go Ape!	H	1	2	3	4	5	6	7	(156)
J	Horse riding	K	1	2	3	4	5	6	7	(159)
K	Information available / interpretation	M	1	2	3	4	5	6	7	(160)
L	Mountain bike trails	O	1	2	3	4	5	6	7	(162)
		(129-132m)								
M	Orienteering / Geocaching	3	1	2	3	4	5	6	7	(165)
N	Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
O	Toilets	B	1	2	3	4	5	6	7	(173)
P	Viewpoint	D	1	2	3	4	5	6	7	(175)
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