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Research Report

Quality of the Visitor
Experience 2015

Haldon 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 243 visitor interviews conducted at Haldon 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 Haldon Forest

Haldon Forest is 3,500 acres of woodland situated 15 minutes from Exeter with panoramic views. There are a variety of activities available at Haldon Forest.

The site has a wide range of walking trails including a trail specially designed to stimulate the senses, cycle trails, horse riding trails, orienteering, segway trail, art and a cafe.

1.3 Perceptions of the site

Perceptions of Haldon as a place to visit were very positive. None of the visitors interviewed at Haldon in 2015 gave a negative rating for the site, whilst over nine in ten visitors (93%) said it was excellent or very good. However, there was a significant drop in the proportion rating the site as 'excellent' since 2012, when 64% said it was excellent compared to 49% in 2015. The 'excellent' rating for Haldon was, however, still considerably higher than the all England average of 32%.

Similarly, ratings of how safe and welcoming Haldon was seen to be were very positive. Again, none of the visitors interviewed at Haldon gave a less than positive rating of the site in terms of it being safe and welcoming, whilst over half said it was 'excellent' (54%): significantly higher than the all England average (36%).

Visitors were asked whether they would be likely to recommend Haldon 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 Haldon and all England sites generally were extremely positive: only 8% gave a rating of less than 9/10 for Haldon, and over three quarters gave the site 10 out of 10 (78%). The proportion of visitors giving the highest score had increased by 9% since 2012 (from 69% to 78%). This was reflected in the overall mean scores for the site as Haldon's average rating in 2012 was 9.5 which was slightly lower than the average in 2015 (9.66).

1.4 Strengths of the site

The cycle trails stood out as being visitors' favourite aspect of Haldon Forest, as just over half the visitors said that these were their favourite thing about the site (51%).

Other popular mentions included the convenient location (28%), the activities that were good for children (26%), good on-site facilities / BBQ areas / gift shop (24%) and the walks / paths / trails (21%).

1.5 Areas for improvement

Almost half of visitors to Haldon could not think of anything that would add to their enjoyment and only made positive comments (49%); 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. The main improvement required was made by over one in six visitors (17%), and that was more trails, paths and cycle tracks.

A little over one in ten (11%) wanted to see improvements made to the car parking facilities (easier / cheaper / free parking), while smaller proportions called for longer, more challenging trails / paths / cycle routes (7%), more activities for the children (5%) and improvements to café / catering (3%)

1.6 Visitor profile

In 2015 almost one fifth of visitors to Haldon were first-time visitors (19%), which is largely unchanged since 2012 but was slightly lower than the all England site average of 24%. Over four fifths of visitors to Haldon were repeat visitors in 2015 (81%).

Typically across all England sites, 85% were 'day trippers' and 14% were staying visitors, and it was almost identical at Haldon where the split was 87% day trippers and 13% staying visitors. Haldon had significantly fewer local visitors in 2015 (71%) compared to 2012 (85%) but was in line with the all England average of 74% who said they had travelled less than three hours to reach the site.

Group sizes were slightly larger at Haldon (averaging 3.85 people) than the all England average (3.23 people). Just over half of visitors to Haldon were there with children (54%). This proportion had increased slightly since the 2012 research (52%) and was also higher than the all England average (48%).

The gender profile at Haldon was skewed towards men as 65% of visitors at Haldon were male while only 35% were female. This was in contrast to the average across all England sites, where there was a slight slant towards females; 53% of visitors were women, and 47% were men.

In terms of the age profile, Haldon visitors were younger than the all England average. Haldon visitors were more likely to be under 45 years old: over two thirds of visitors at Haldon were under 45 (69%), whilst just under a third of them were aged over 45 (31%). 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 = 78%) than C2DE (skilled and unskilled manual workers and the unemployed = 22%). This was also replicated across all England sites on average (69% ABC1, 30% C2DE

Over half of visitors to Haldon had children in the household (57%), which was higher than the all England average (47%). This reflects the high proportion of visitors to the site who were under 45.

The overwhelming majority of visitors to Haldon were white British / Welsh / Irish (96%), with only a small number of visitors describing their ethnicity as 'White Other European' (3%) or 'Black / Asian / Mixed' (1%).

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 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 Haldon, interviewing took place between 30th of March and 18th October, and a total of 243 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Haldon 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 Haldon. 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 Haldon was largely in line with that of the visitors to all the England sites.

The gender profile at Haldon was skewed towards men as 65% of visitors at Haldon were male while only 35% were female. This is in contrast to the average across all England sites, where there is a slight slant towards females; 53% of visitors were women, and 47% were men.

In terms of the age profile, Haldon visitors were younger than the all England average. Haldon visitors were more likely to be under 45 years old: over two thirds of visitors at Haldon were under 45 (69%), whilst just under a third of them were aged over 45 (31%). 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 = 78%) than C2DE (skilled and unskilled manual workers and the unemployed = 22%). This was also replicated across all England sites on average (69% ABC1, 30% C2DE)

Over half of visitors to Haldon had children in the household (57%), which was higher than the all England average (47%). This reflects the high proportion of visitors to the site who are under 45.

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

Table 2: Profile of visitors by key demographics 2015

		Haldon %	All England %	
Gender	Male	65	47	
	Female	35	53	
Age	16 - 24	6	4	
	25 - 34	22	17	
	35 – 44	41	30	
	45 – 54	22	22	
	55 – 64	6	14	
	65+	3	12	
Social class	AB	44	37	
	C1	34	32	
	C2	18	20	
	DE	4	10	
	Refused	-	1	
Working status	Full-time employee (30+ hours per week)	63	54	
	Part-time employee (<30 hours per week)	15	17	
	Self-employed	13	4	
	Full-time education	1	2	
	Unemployed	1	1	
	Permanently sick / disabled	<1	1	
	Retired	4	15	
	Looking after home	2	5	
	Other	<1	<1	
	Refused	-	1	
Limiting illness	Yes – limited a lot	1	1	
	Yes – limited a little	4	4	
	No	95	94	
	Refused	-	1	
Children in household	Yes	57	47	
	No	43	53	
	Refused	-	<1	
Ethnicity	White – British / Welsh / Irish	96	96	
	White – Other	3	2	
	Black / Asian / Mixed	1	2	
	Refused	-	<1	

Base: All visitors – Haldon 2015 (243); All England (1,762)

3.2 Group profile

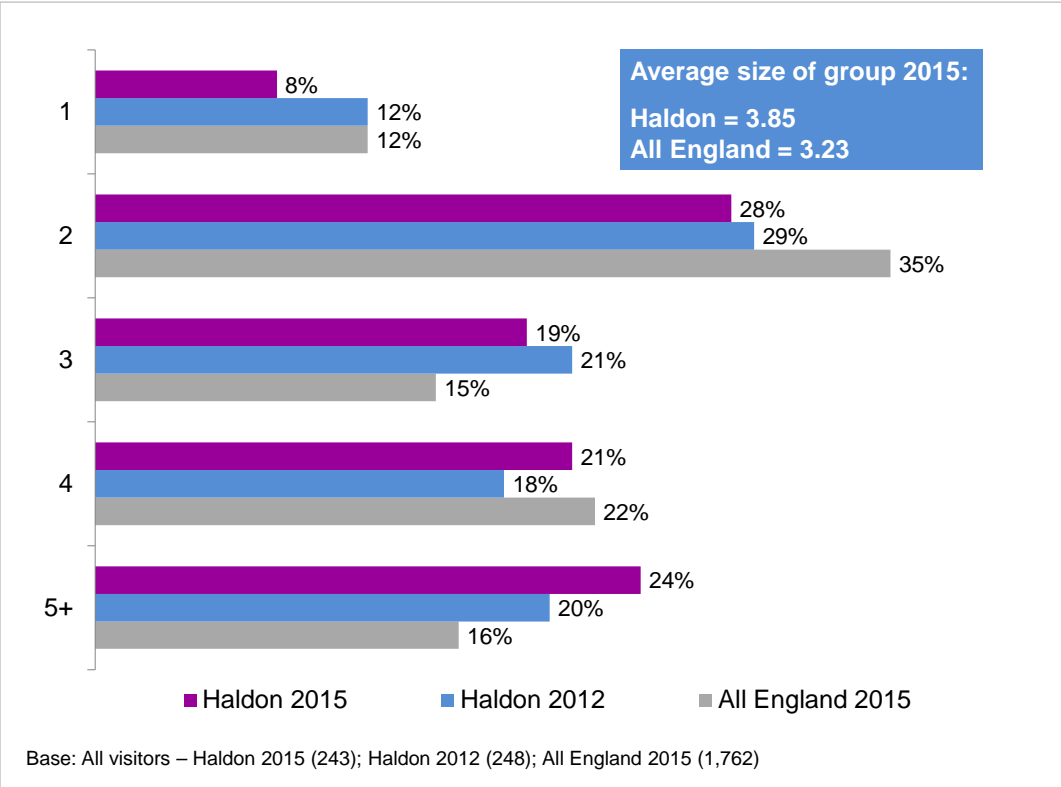
3.2.1 Size of group

Group sizes were slightly larger at Haldon (averaging 3.85 people) than the all England average (3.23 people).

Visitors at Haldon in 2015 were more likely to visit in pairs (28%): this is similar to the 2012 survey (29%) but almost half of visitors to Haldon visited in a group of four or more: this proportion has increased slightly since 2012 (45% and 38% respectively).

Just 8% were visiting Haldon alone, a slight 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



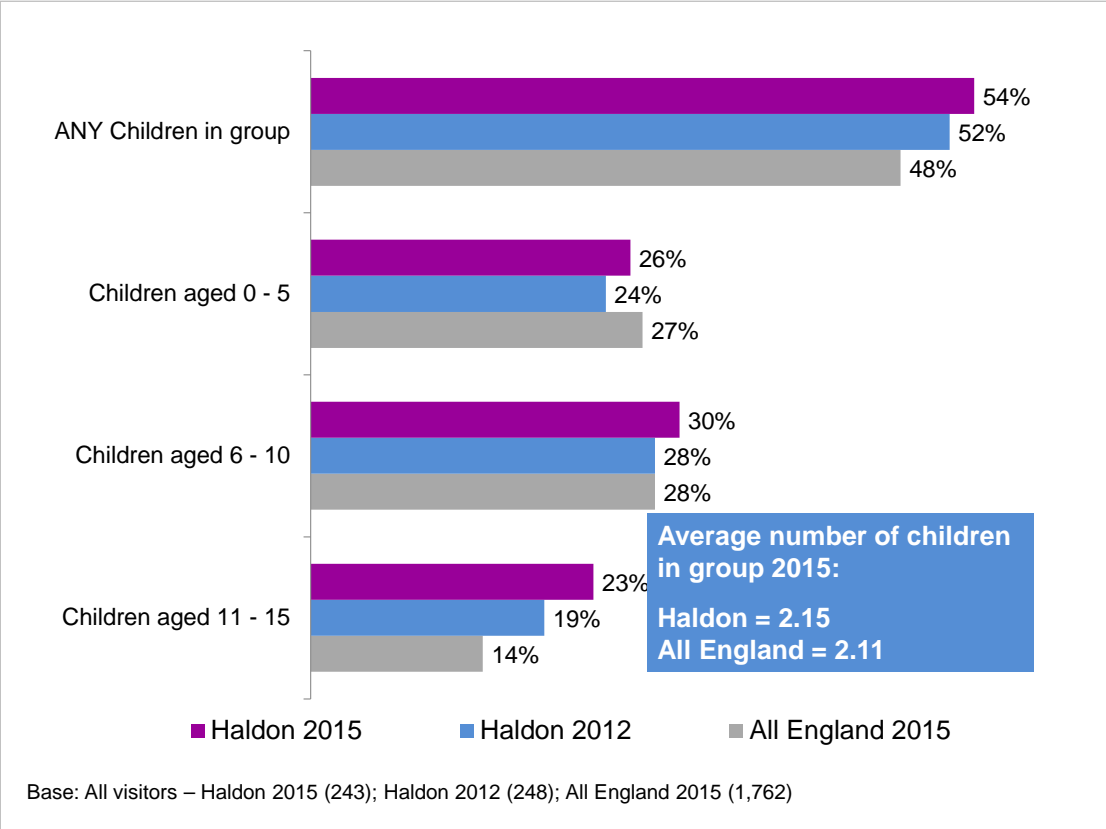
3.2.2 Composition of group

Just over half of visitors to Haldon were there with children (54%). This proportion had increased slightly since the 2012 research (52%) and was also higher than the all England average (48%).

Even though the proportion of groups visiting Haldon with children was slightly higher than the all England average, the average number of children per group was similar to the all England average per site (mean of 2.2 children per group at Haldon 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 older children had increased from 19% in 2012 to 23% in 2015 and was noticeably higher than the all England average (14%).

Figure 2: Q1. Composition of group



4. Profile of visit

4.1 Type of visit

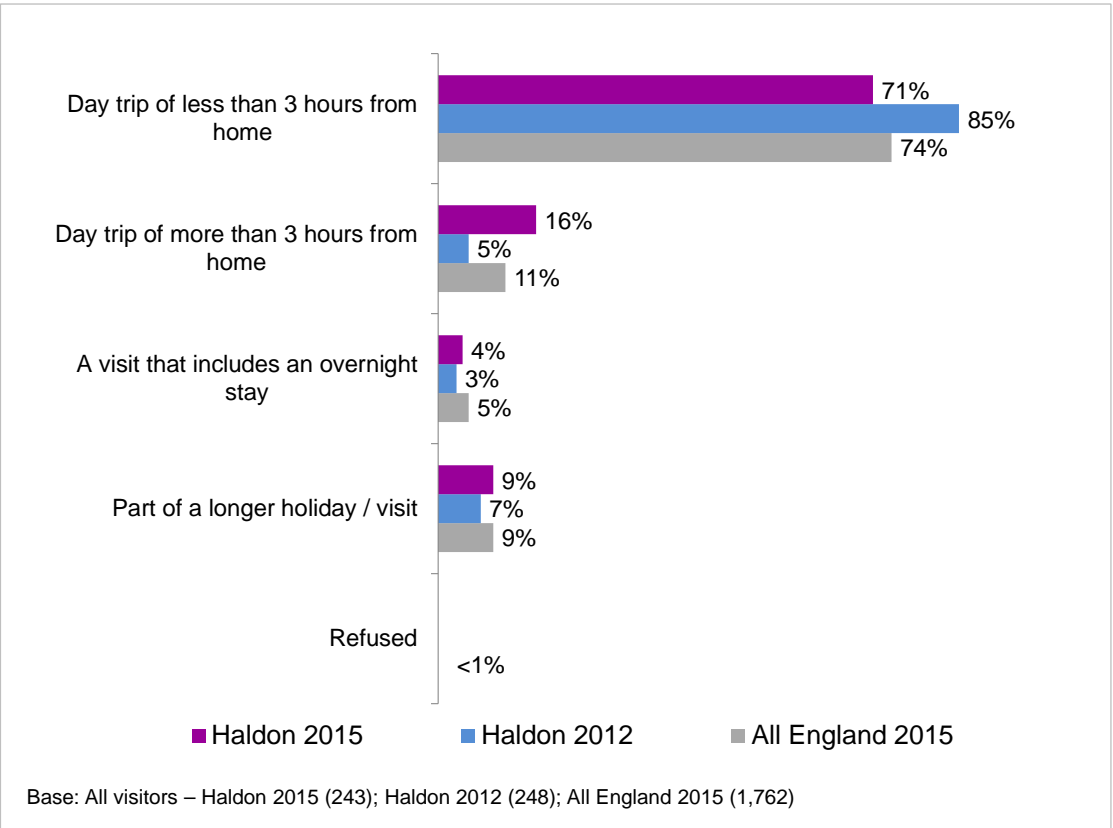
Typically across all England sites, 85% were ‘day trippers’ and 14% were staying visitors, and it was almost identical at Haldon where the split was 87% day trippers and 13% staying visitors.

Haldon had significantly fewer local visitors in 2015 (71%) compared to 2012 (85%) but is in line with the all England average of 74% who said they had travelled less than three hours to reach the site.

One in six visitors to Haldon had travelled over three hours for their day trip (16%), which was higher than the all England average (11%) and was considerably higher than reported in the previous research (5%).

The proportion of Haldon visitors reporting that they would be staying overnight in the area had increased in 2015 from 10% in 2012 to 13% in 2015 which was more in line with the all England average (14%).

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.

Almost all the visitors to Haldon had travelled from within England and the majority of those visitors came from South West England (90%). The bulk of the remaining English visitors had come from South East England (4%) and East of England (2%). Very small numbers or no visitors had come from Wales, Scotland, and Northern Ireland or abroad.

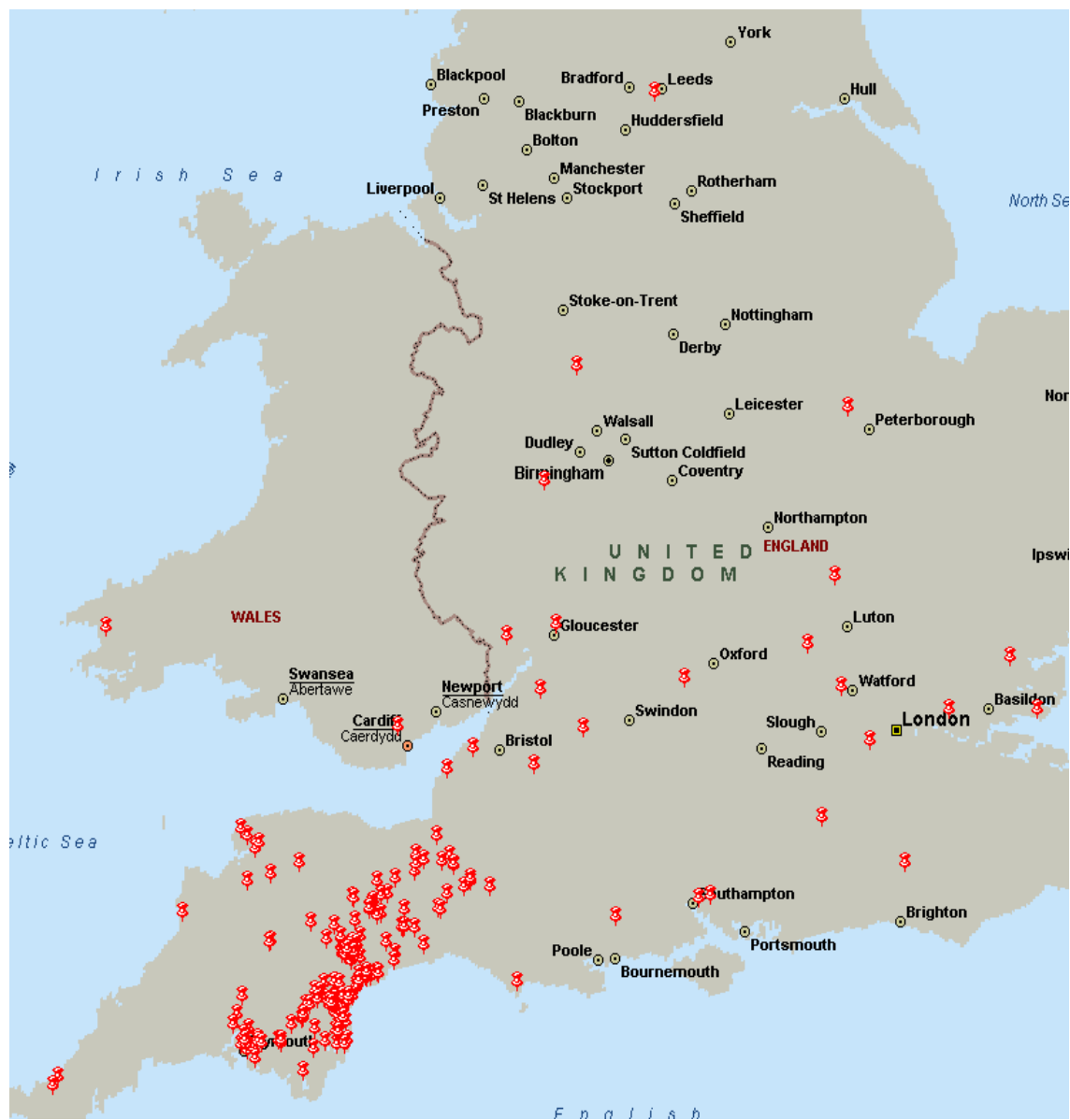
Table 3 below and Figure 4 overleaf provide more details.

Table 3: Q28a. Visitor origin 2015

		Haldon %	All England %
Home region	North East England	-	11
	Yorkshire & Humberside	<1	11
	North West England	-	2
	West Midlands	1	14
	East Midlands	<1	24
	East of England	2	4
	Greater London	1	1
	South East England	4	17
	South West England	90	13
Home nation	England	98	98
	Wales	1	<1
	Rest of UK	-	1
	Abroad	1	<1

Base: All visitors – Haldon (243); All England (1,762)

Figure 4: Map of visitor origin for Haldon



4.3 Frequency of visits

4.3.1 First-time visitors

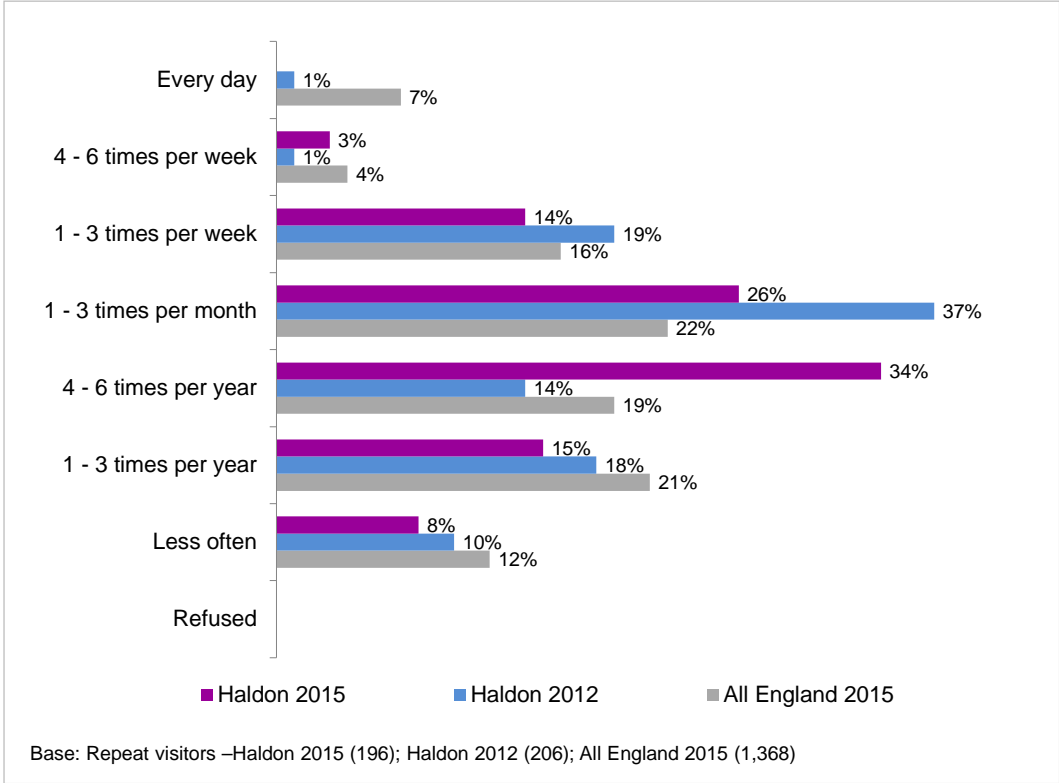
In 2015, almost one fifth of visitors to Haldon were first-time visitors (19%), which is largely unchanged since 2012 but is slightly lower than the all England site average of 24%. Over four fifths of visitors to Haldon were repeat visitors in 2015 (81%).

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 (57%). Just over two fifths therefore visited the site monthly or more often (43%).

This is largely in line with the all England average, although it does represent a drop in frequency of visiting since 2012, when 58% visited at least monthly.

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



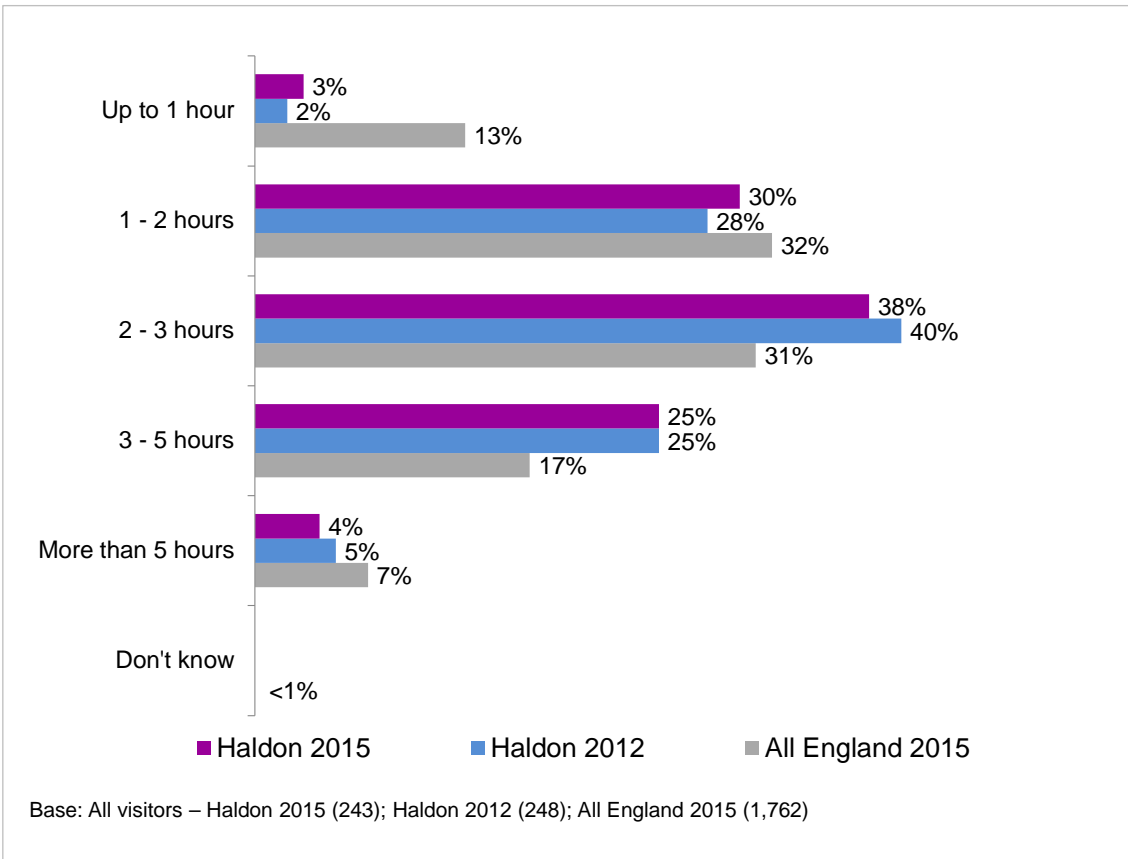
4.4 Length of visit

The average length of visit was only 2 minutes shorter at Haldon in 2015 than in 2012, with visitors spending, on average, 2 hours and 39 minutes at the site. The average length of stay across all sites in England was slightly shorter, at 2 hours and 26 minutes.

Figure 6 shows the individual lengths of time visitors spent at Haldon in 2015 was very similar to the 2012 research. Haldon visitors were at the site for longer than the all England average, as the proportion of visitors staying at Haldon for two hours or more was 12% higher than the all England average (67% at Haldon compared to 55% all England average).

Visitors to Haldon were more likely to spend between 2-3 hours at the site compared to the all England average (38% at Haldon compared to 31% on average across all England). Only a small proportion of visitors to Haldon had reported that they had stayed at the site for less than an hour (3%), while over one in ten visitors on average had stayed for less than an hour across all England sites – 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 Haldon was cycling generally (65%), which was significantly higher than the England average (30%) but it was less popular than in 2012 when 72% said they had taken part in cycling activities on their visit. There was a particular increase in the proportion of visitors saying they had been cycling off roads and tracks in 2015 compared to 2012 (42% in 2015 compared to 15% in 2012).

Conversely, walking was far less popular at Haldon than at the other sites across England, with only 35% of visitors to Haldon in 2015 taking part in any walking activities compared to 67% on average across the other sites. The proportion of visitors who said they had been walking at Haldon was similar to that in the 2012 (35% and 36% respectively); however, fewer visitors said they had been walking on sign-posted trails and non-signposted trails in 2015 (22% and 5% respectively) compared to 2012 (28% and 13% respectively). The only increase was seen in those saying they had been walking the dog as 16% said they had in 2015 while only 4% had been walking the dog in 2012.

Visiting the café was the second most popular activity at Haldon, with 41% of visitors using it: down slightly from 44% in 2012 but significantly lower than the all England average (54%).

The play area was used by 16% of visitors; again slightly lower than in 2012 (18%) and the all England average of 25%. Go Ape! was used by 6% of visitors.

Overall, the vast majority of visitors took part in 'active' activities (96%), which is a significant increase on the 2012 average (78%), and is also slightly higher 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

	Haldon 2015 %	Haldon 2012 %	All England 2015 %
Cycling on forest roads, tracks or trails	42	69	20
Cycling off trails or tracks	42	15	15
TOTAL CYCLING	65	72	30
Walking on a sign-posted trail	22	28	38
Walking but not following sign-posts	5	13	8
Dog walking	16	4	29
TOTAL WALKING	35	36	67
Using the café / restaurant / other catering	41	44	54
Using the play area	16	18	25
Admiring the views	14	9	13
Picnic or barbeque	7	8	7
Go Ape!	6	*	4
Photography	5	3	2
Using the Visitor Centre / shop	4	2	9
Bird watching	4	1	3
Running / jogging	3	-	2
Seeing something in the forest	2	-	6
Segway	2	-	
Nature / natural history visit	1	-	2
Organised event / trip	1	-	1
Orienteering / Geocaching	<1	-	<1
Other	2	7	6
Taken part in ACTIVE activities	96	78	94

Base: All visitors – Haldon 2015 (243); Haldon 2012 (248); All England 2015 (1,762)

* Data not available

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 Haldon lasted 2 hours and 39 minutes on average. Visitors were spending a similar amount of time at the site in 2015 as they did in 2012 when they spent 2 minutes longer on average at the site in 2012.

Those walking spent an average of 1 hour and 40 minutes doing so; this was a small 2 minute decrease since 2012, when the average time spent walking was 1 hour and 42 minutes.

The average time spent cycling at Haldon in 2015 was 41 minutes longer than the average walking time, at 2 hours and 21 minutes. Visitors were also cycling for 11 minutes longer in 2015 as the average cycling duration was 2 hours and 10 minutes in 2012.

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

	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	-	8	2	1	1
31 – 60 minutes	2	2	15	13	5	6
1 – 2 hours	30	28	55	57	37	44
2 – 3 hours	38	40	12	24	38	34
3 – 5 hours	25	25	10	3	18	14
5+ hours	4	5	-	-	1	1
Don't know	-	-	-	-	-	-
AVERAGE	2 hrs 39 mins	2 hrs 41 mins	1 hr 40 mins	1 hr 42 mins	2 hrs 21 mins	2 hrs 10 mins

Base: All respondents - 2015 (243); 2012 (248), Respondents who walked - 2015 (78); 2012 (87), Respondents who cycled – 2015 (148); 2012 (167)

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

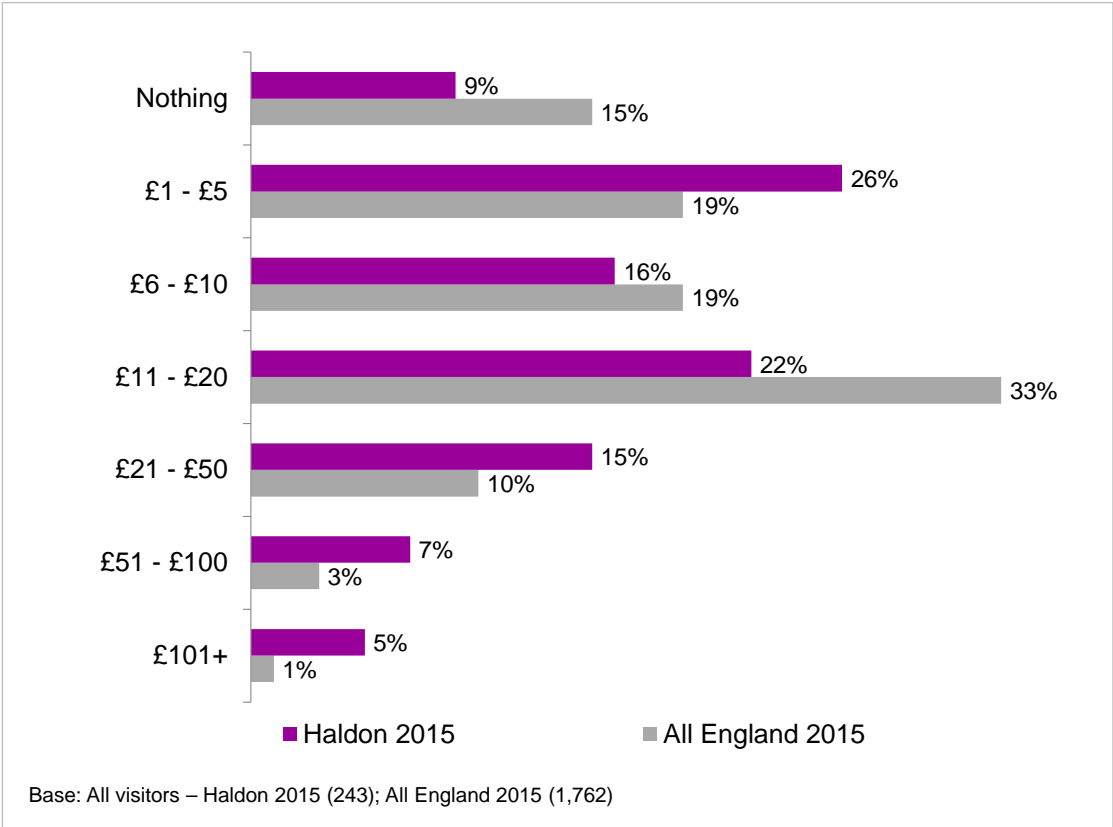
Visitors to Haldon were asked how much they intended to spend during their visit at the site on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. Figure 7 shows the figures calculated by combining the data across all types of intended spending.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

Only one in ten of the visitors interviewed said that they did not intend to spend any money at the site (9%), which was slightly lower than the all England average (15%).

Over a quarter of visitors (27%) planned to spend over £21 on their visit, which represents slightly higher spending than typically recorded, 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 Haldon was higher than the average at all England sites at £27.62 (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 Haldon was likely to spend on was parking, with almost four in five visitors planning to spend on this (79%). The average planned spend on parking was £4.05, 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 on food and drink; over half of visitors (56%) were likely to spend on food and drink, with an average spend of £8.04. This was slightly lower than the all England average (£8.32).

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

	% spending anything on items		Average spend on items £	
	Haldon %	All England %	Haldon £	All England £
Parking	79	71	£4.05	£3.01
Food and drink	56	65	£8.04	£8.32
Activities at the site	9	5	£14.27	£3.09
Hiring equipment	5	2	£1.40	£0.56
Souvenirs / gifts	-	5	£0.00	£0.50
Anything else	12	2	£1.97	£0.32

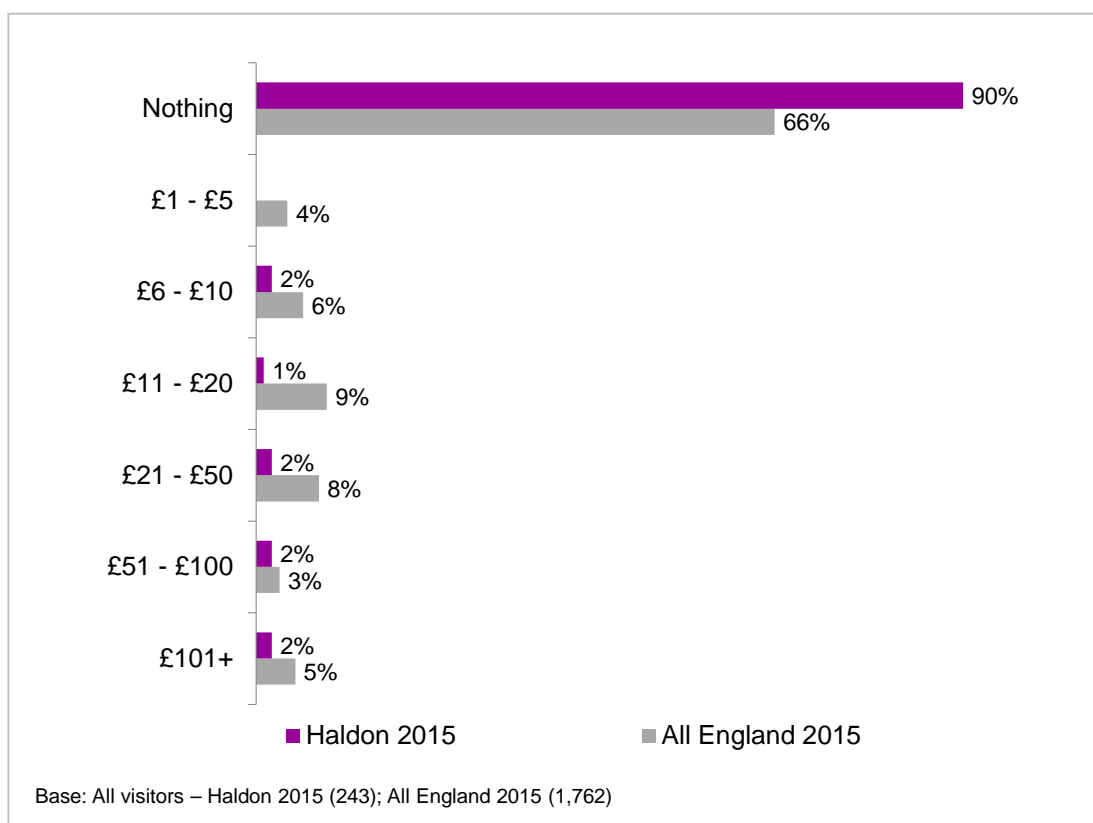
Base: All visitors – Haldon 2015 (243); All England 2015 (1,762)

Visitors to Haldon 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.

Nine out of ten visitors to Haldon said that they would not be spending any money in the local area as a result of their trip (90%); this was considerably higher than the all England average (66%).

The average intended spend in the area was £22.94, which is lower 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 Haldon, food and drink and parking were the main areas of intended spending: 9% planned to spend on food and drink (average of £6.14) and 5% would spend on parking (average of £0.56).

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

	% spending anything on items		Average spend on items £	
	Haldon %	All England %	Haldon £	All England £
Food and drink	9	25	£6.14	£10.02
Parking	5	19	£0.56	£1.26
Accommodation	2	5	£12.20	£14.69
Admissions to other attractions	2	3	£1.88	£1.16
Souvenirs / gifts	2	4	£0.67	£1.61
Transport	1	11	£1.12	£3.47
Hiring equipment	1	1	£0.18	£0.40
Anything else	<1	5	£0.21	£2.35

Base: All visitors – Haldon 2015 (243); All England 2015 (1,762)

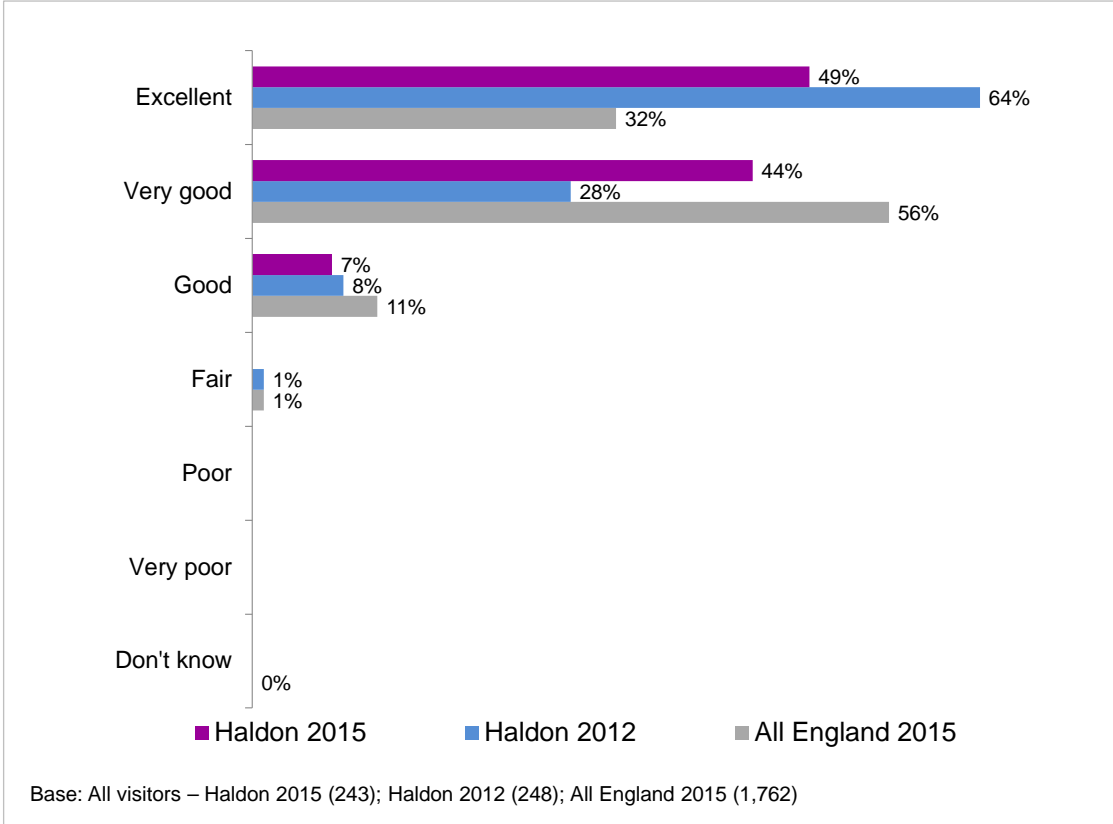
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Haldon 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 as well. None of the visitors interviewed at Haldon in 2015 gave a negative rating for the site, whilst over nine in ten visitors (93%) said it was excellent or very good. However, there was a significant drop in the proportion rating the site as 'excellent' since 2012, when 64% said it was excellent compared to 49% in 2015. The 'excellent' rating for Haldon was, however, still considerably higher than the all England average of 32%.

A further 7% said the site was 'good', which was lower than the all England average of 11%.

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

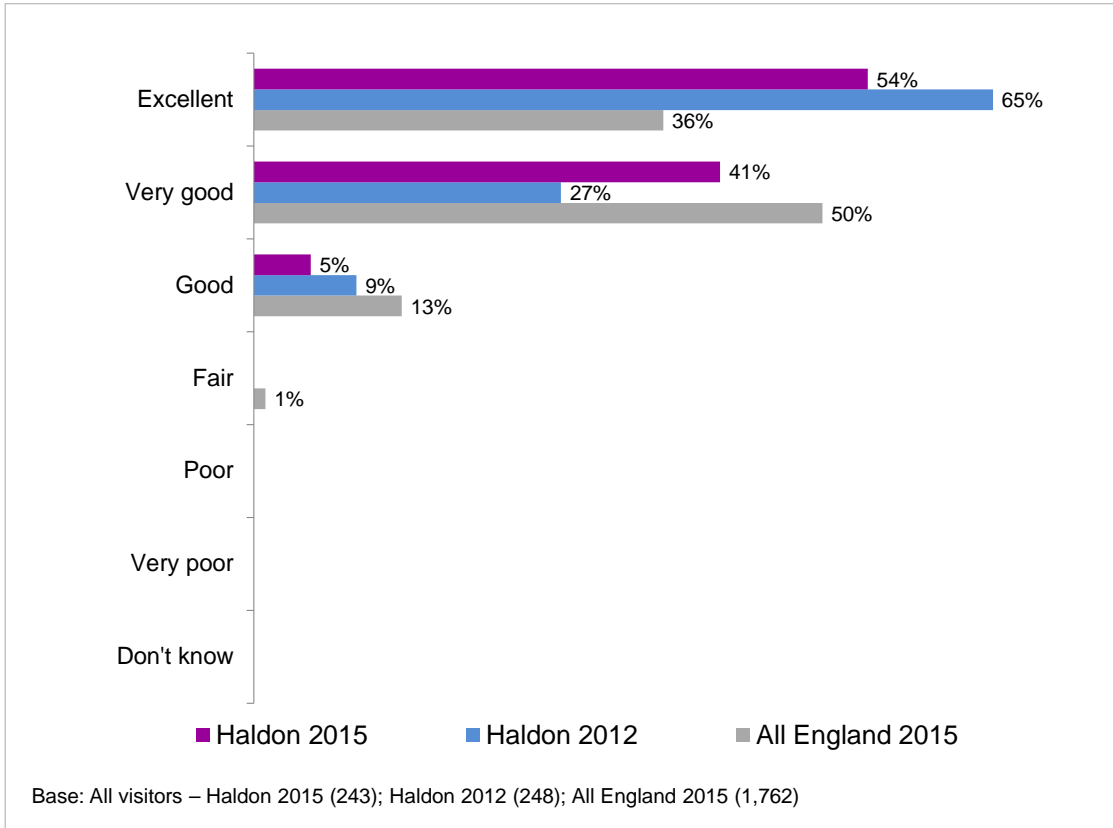


5.2 Overall rating of the site as safe and welcoming

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

Again, none of the visitors interviewed at Haldon gave a less than positive rating of the site in terms of it being safe and welcoming, whilst over half said it was ‘excellent’ (54%): significantly higher than the all England average (36%). The vast majority of visitors said the site was ‘excellent’ or ‘very good’ (95%) but the proportion rating the site as ‘excellent’ had decreased since 2012 (65%).

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 Haldon and all England sites.

When asked why they gave Haldon a positive rating, visitors were most likely to mention the maps / information boards and the signage (45%). This was only mentioned by 13% of visitors on average at the other sites across England.

Other popular mentions included how well laid out the site was (36%), it being a good, safe place for all people generally (30%), the friendly / helpful staff (19%), that the site was clean / tidy / well maintained (17%) and a good, safe environment for children to play and run around (16%).

Other comments made by one in ten or fewer visitors who gave the site 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

	Haldon 2015 %	All England 2015 %
Well signposted / good maps / info boards	45	13
Well laid out / well organised / good set-up	36	18
Safe environment generally for all people	30	19
Friendly / helpful staff or rangers	19	8
Clean / tidy / well maintained / litter free	17	11
Good, safe place for the kids to play / run around	16	22
Good quality facilities / amenities	11	11
Good provision of paths / trails and tracks	7	25
Other visitors here are friendly	5	5
Good car parking facilities	4	1
Away from roads / no cars / cars drive slowly	3	1
General positive comments (enjoyable, great area)	2	<1

Base: Visitors rating the site as excellent, very good or good – Haldon 2015 (242); All England 2015 (1,743)

Further comments made by one percent of visitors included:

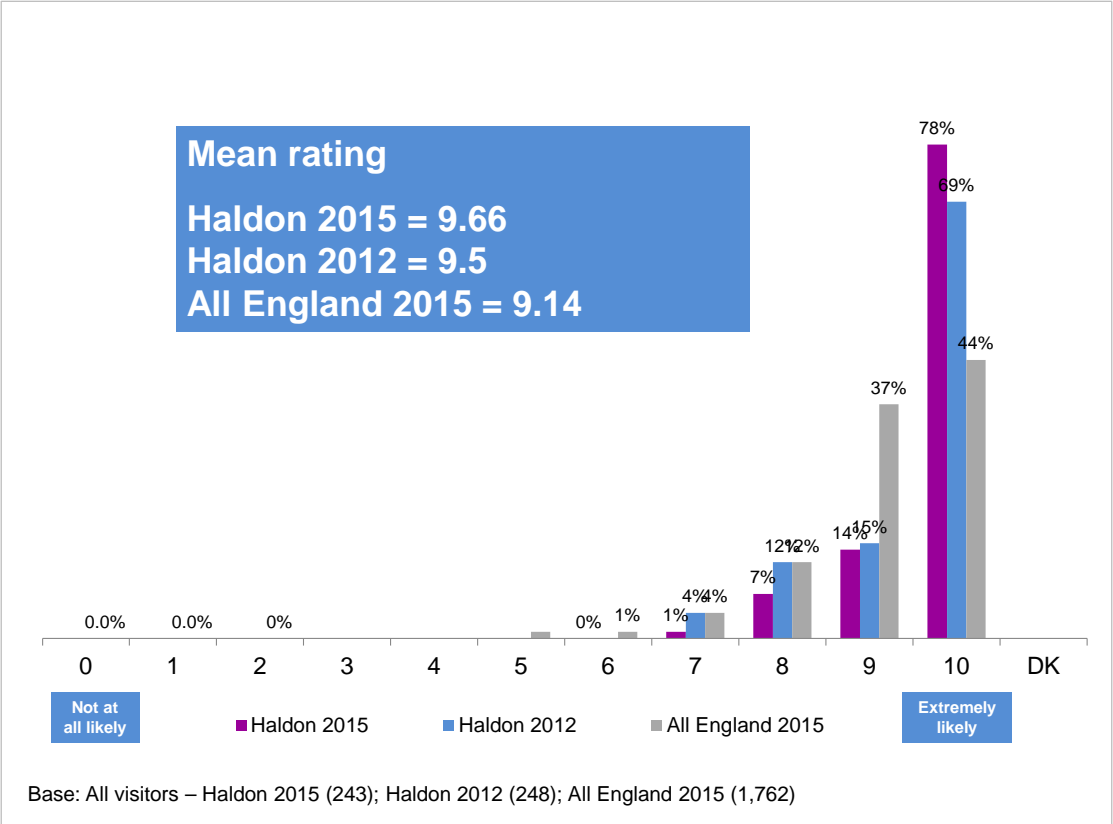
- The scenery / views / beautiful environment
- Peaceful / pleasant / tranquil / relaxing / welcoming
- Fresh air / open spaces / plenty of space / freedom
- Live locally / convenient / easy access

5.3 Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Haldon 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 Haldon and all England sites generally were extremely positive: only 8% gave a rating of less than 9/10 for Haldon, and over three quarters gave the site 10 out of 10 (78%).

The proportion of visitors giving the highest score had increased by 9% since 2012 (from 69% to 78%). This was reflected in the overall mean scores for the site as Haldon's average rating in 2012 was 9.5 which was slightly lower than the average in 2015 (9.66). The 2015 average was also higher than the all England average of 9.14.

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 Haldon in 2015 is 92, which is higher than the scores for both 2012 and the all England average (84 and 78 respectively).

5.4 Favourite things about the site

Visitors to Haldon 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.

The cycle trails stood out as being visitors' favourite aspect of Haldon Forest, as just over half the visitors said that these were their favourite thing about the site (51%). This was almost identical to the 2012 survey as 50% noted that the cycle trails were their favourite aspect of the site. Under a quarter of visitors named the cycle trails at the other sites across England (22%).

Other popular mentions included the convenient location (28%), the activities that were good for children (26%), good on-site facilities / BBQ areas / gift shop (24%) and the walks / paths / trails (21%).

The other aspects noted by less than one in five visitors to Haldon are listed in table 8 below.

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

Activities	Haldon 2015 %	Haldon 2012 %	All England 2015 %
Cycle trails / freedom / opportunity to cycle	51	50	22
Close to home / convenient location	28	16	16
Activities that are good for the children	26	15	20
Good on-site facilities / BBQ areas / gift shop	24	29	12
Walks / paths / trails	21	19	40
Scenery / views / beautiful / natural	19	29	29
Clean / well looked after	16	10	11
Safe environment generally	13	13	10
Plenty / cheap / other reference to parking	13	-	3
Opportunity to spend time with family / friends	12	10	14
Peace / tranquillity / relaxation / atmosphere	10	13	30
Café / restaurant	8	-	2
Lots to see and / or do	7	14	6
Like forests / trees / variety of trees and plants	6	8	16
Fresh air / being outside	3	14	16
Good toilets	3	-	1

Base: All visitors – Haldon 2015 (243); Haldon 2012 (248); All England 2015 (1,762)

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

- Helpful / pleasant staff
- Something for everyone
- Ideal for dogs / dog friendly / safe for dogs
- Remote / away from traffic
- Friendly people
- Wildlife / birdwatching
- Exercise / keeping fit
- Cost / value for money / free
- Well signposted / good maps / info boards
- Go Ape!
- Open space / plenty of space
- Good accessibility
- Well laid out / good layout

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

- A higher proportion of older visitors liked the walks / paths / trails (43% of people who were 55+) than average, followed by the cycle trails and the scenery / views (both 29%).
- Younger visitors were more likely to say they liked the good on-site facilities / BBQ areas / gift shop more than the other age groups (35% of 16-34s compared with 21% of 35-54s and 10% of 55+s).
- The cycle trails were also more popular than average with C2DE visitors (66%).

5.5 Suggested improvements to the site

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

Almost half of visitors to Haldon could not think of anything that would add to their enjoyment and only made positive comments (49%); 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. The main improvement required was made by over one in six visitors (17%), and that was more trails, paths and cycle tracks.

A little over one in ten (11%) wanted to see improvements made to the car parking facilities (easier / cheaper / free parking), while smaller proportions called for longer, more challenging trails / paths / cycle routes (7%), more activities for the children (5%) and improvements to café / catering (3%) – see Table 9 for more details.

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

	Haldon 2015 %	All England 2015 %
Nothing / general positive comments	49	45
More trails, paths and cycle tracks	17	5
Better parking (easier, cheaper, more, free)	11	14
Longer, more challenging trail, paths and cycle routes	7	3
More activities for children / more play areas	5	5
Improve café / catering	3	3
Fewer people / fewer cyclists	2	1
Separate trails for cyclists / dog walkers / walkers with children	2	<1
Improve toilets / more toilets / shower facilities / changing area	2	2
Improve signage / more maps / better maps	2	2
More bins / recycling bins	2	4

Base: All visitors – Haldon 2015 (243); All England 2015 (1,762)

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

- Better weather
- Drinking water taps
- More dog poo bins / remove dog poo
- Cheaper cafe
- On-site pub
- Bike shop / more shops
- Improve maintenance of paths / cycle tracks / better surfacing
- Camping / places to stay overnight (lodges)
- Plant more trees
- Dog washing facilities
- Better access / make it more accessible (including disabled access)
- Cyclists should have more regard for walkers

When asked if there was anything that interfered with their enjoyment of their visit to Haldon over three quarters reported that nothing had interfered with their enjoyment (77%): this was considerably higher than the all England average of 57%.

Therefore, only very small proportions of visitors at Haldon said that anything had interfered with their enjoyment of the site: 5% felt the fact that there were no separate trails for cyclists / dog walkers and those with children had interfered with their enjoyment of the site, 4% said they had had problems getting around the site and 3% said that poor weather (wet, raining or windy) had affected their visit.

The comments given by 2% or more of the sample are outlined in Table 10 overleaf.

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

	Haldon 2015 %	All England 2015 %
Nothing	77	57
Should have separate trails for cyclists / dog walkers / walkers with children	5	1
Problems getting around the site (e.g. trails closed, no disabled access)	4	1
Wet / raining / windy (poor weather)	3	11
Problems with car parks (faulty machines, limited spaces)	2	1
Too busy / too many children	2	1

Base: All visitors – Haldon 2015 (243); All England 2015 (1,762)

Other comments, not shown above as made by 1% included:

- Poor service in café / long queues / inconvenient opening hours
- Dogs off leads / loose dogs / don't want dogs around
- Dog mess on paths / in play areas
- Too many cyclists / cyclists cutting up walkers
- Car parking expensive / should be free parking
- Complaints about other visitors

6. Site facilities

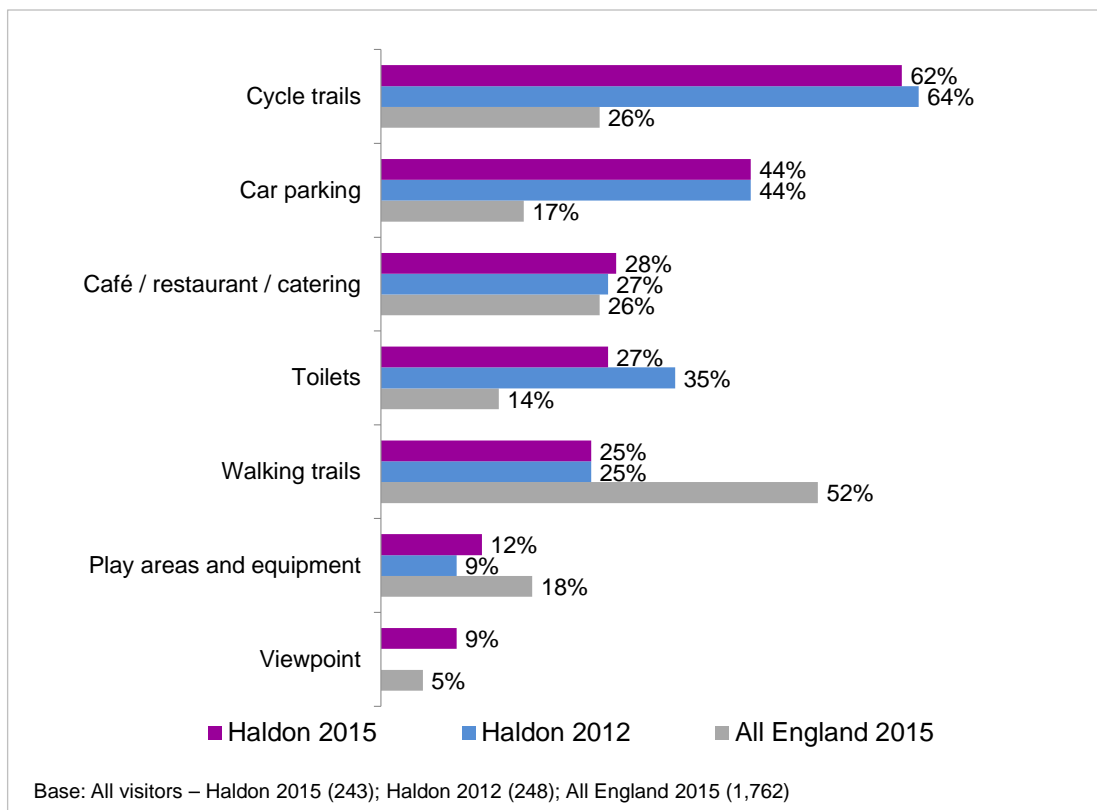
6.1 Importance of site facilities

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

Cycling trails were mentioned by the highest proportion of visitors (62%); this figure was similar to the 2012 survey (64%) but was considerably higher than the all England average (26%). In contrast to this, the walking trails were more important at other sites across England as 52% mentioned the walking trails on average, while only 25% mentioned the walking trails at Haldon in 2015 and 2012.

The second most important facility at Haldon, in both 2015 and 2012, was the car park (44% for both). The car parking facility was less important at other sites, as the all England average was 17%. This was followed by the café / catering facilities which was considered important by 28% of visitors in 2015, similar to the 2012 survey and the all England average (27% and 26% respectively) – see Figure 12a below.

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



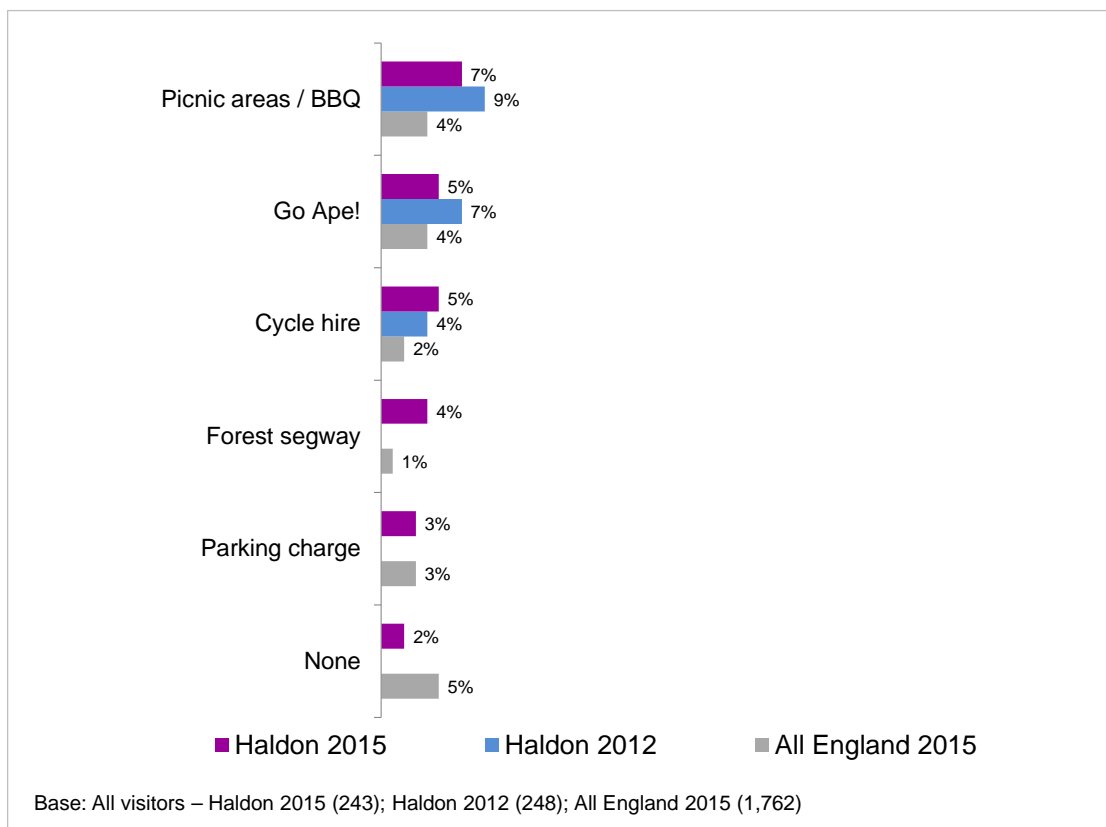
In addition, toilets and the walking trails were considered important by a quarter of visitors at Haldon in 2015 (27% and 25% respectively). The toilets had decreased in importance since 2102 (35%) but they were still considered important by more visitors at Haldon compared to visitors across the other England sites (14%). The walking trails however, were considered less important at Haldon than at the other sites across England where, on average, half the visitors said that the walking trails were the most important aspect when deciding to visit the site (52%).

The play areas and equipment were also considered less important at Haldon in 2015 (12%) compare to the all England average (18%). However these had increased in importance since the 2012 survey (9%).

The picnic / BBQ areas, and Go Ape! had conversely decreased in importance slightly compared to the 2012 survey (from 9% and 7% to 7% and 5%) but they were in line with the all England average.

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 over one fifth of visitors when choosing to come to the site (22%). The main factor that influenced visitors' decision to go to Haldon in 2015 was the fact that it was local and a convenient location (8%): higher than the all England average of 4%. For the remaining factors, only a relatively small proportion of visitors mentioned each one, and those mentioned by 1% or more visitors are outlined below in Table 11:

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

	Haldon 2015 %	All England 2015 %
Nothing	78	69
Local / close to home / convenient	8	4
Easy to find / get to	3	1
Good weather / sunny / warm	2	2
Beautiful scenery / views / natural beauty	2	2
Close to where I'm staying	1	1
Was just passing / en route / was in the area	1	<1
Dog friendly / dogs can come off leads / dog facilities	1	4

Base: All visitors – Haldon 2015 (243); All England 2015 (1,762)

Other factors mentioned by fewer than 1% of visitors included:

- Good for the children / can run around and play
- A nice day out
- Meeting / visiting with family and friends
- Site specific event (e.g. Race for Life)
- Been before / come here a lot / good memories
- Wanted to go walking / cycling
- Read about the site on websites / magazines

6.2 Facilities used

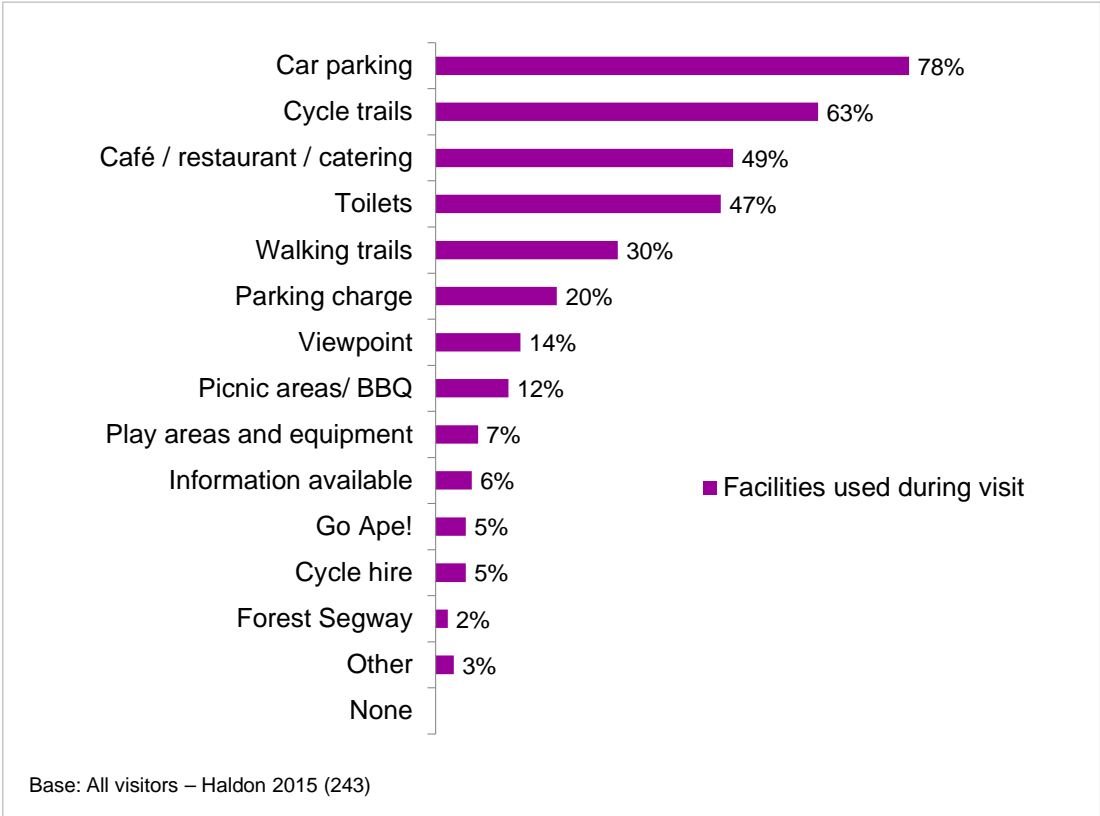
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The car park (78%), the cycle trails (63%), the café / restaurant / catering (49%) and toilets (47%) were used by the highest proportion of visitors.

The walking trails were used by around a third of visitors (30%), and the parking charge was used by one fifth of visitors (20%).

Other facilities used by fewer than one in six can be seen in the Figure 13 below:

Figure 13: Q15. Facilities used at Haldon 2015



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 Haldon 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’.

The cycle trails received the highest score, with 43% rating this facility as ‘excellent’ and nearly all of the remaining users rating it as very good (45%) or good (11%). Only 1% of those using this facility rated it as fair and no one gave the facility a negative rating.

The walking trails had similar ratings with 40% rating them as ‘excellent’ and 45% rating them as ‘very good’. Ratings for the café / restaurant / catering and the car parking were also positive, with a quarter of visitors rating them as ‘excellent’ (27%, 25% respectively). Only 1% rated each facility as poor.

Slightly fewer visitors rated the toilets as ‘excellent’ (17%) but the ratings were still high with 42% rating them as very good, 32% rating them as good and only 2% giving them a negative rating. The parking charge on the other hand was not rated as highly as a quarter of the visitors who had used this facility had rated it as poor (25%). See Figure 14 below for more details.

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

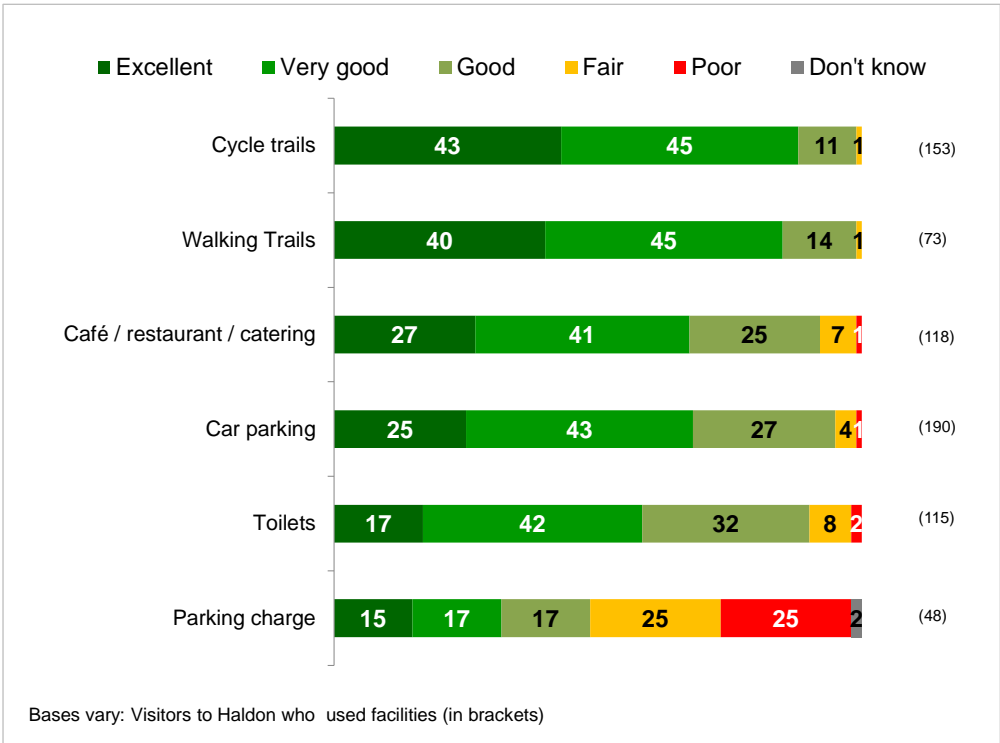


Table 12 compares the proportions giving ‘excellent’ ratings to the facilities used in 2015 compared with 2012, where they were mentioned in the previous survey.

The proportions who gave an ‘excellent’ rating for the facilities used by 50 or more visitors have all gone down, apart from one – the walking trails which has gone up by 2%. The most significant decreases were seen in the ratings for the car parking facility and the cycle trails (14 and 11 percentage point decreases respectively).

There was also a drop in the proportion giving the café / restaurant / catering facilities and the toilets an ‘excellent’ rating but these were minor changes (3 and 5 percentage point decrease respectively).

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

Facilities	Haldon 2015 %	Haldon 2012 %	% point change
Cycle trails	43	54	-11
Walking trails	40	38	+2
Café / restaurant / catering	27	30	-3
Car parking	25	39	-14
Toilets	17	22	-5

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 Haldon as a place to visit. This question was prompted and visitors could mention as many sources of information as were applicable – those given by 2% or more visitors are outlined below.

Over half of visitors had always known about the site (56%), whilst two fifths had heard about it through word of mouth (38%).

Around one in ten became aware of the site online, with 10% mentioning Google / other search engine.

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

	Haldon 2015 %	Haldon 2012 %	All England 2015 %
Always known about it / been here before	56	55	53
Word of mouth	38	34	34
Google / other search engine	10	*	4
Road signs	4	-	1
Leaflets	3	4	3
Forestry Commission website	3	*	4
Tourist Information Centre / Tourist Board	2	-	2
Facebook	2	*	1
Just passing / en route	2	-	2

Base: All visitors – Haldon 2015 (243); Haldon 2012 (248); 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:

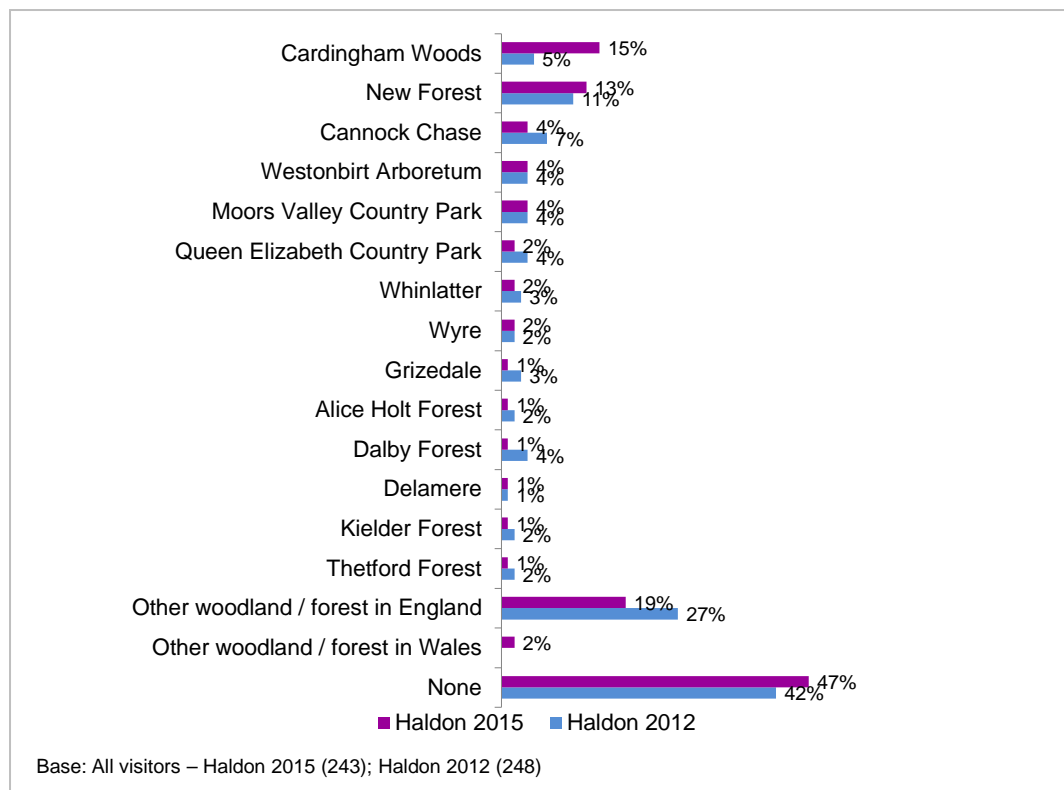
- Map
- Sporting magazines (e.g. mountain biking)
- Smartphone app
- Other websites

7.2 Visiting other sites

Visitors to Haldon 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 over half (53%) had visited at least one other site, although in 2012, 58% had visited another site.

Cardingham Woods was mentioned by the highest proportion of visitors to Haldon (15%). A little over one in ten mentioned the New Forest (13%), followed by Cannock Chase, Westonbirt Arboretum and Moors Valley Country Park (4% each). Two percent or fewer of Haldon visitors had visited the remaining listed sites. See Figure 15 for more details.

Figure 15: Other sites visited in the last 12 months



Other sites mentioned by small numbers of visitors included

- Abbots Wood
- Bedgebury
- Dunwich Forest
- Fineshade Woods
- Gisburn
- Guisborough Forest
- Hamsterley

8. Discovery passes

8.1 Uptake and interest in season tickets and annual Discovery Passes

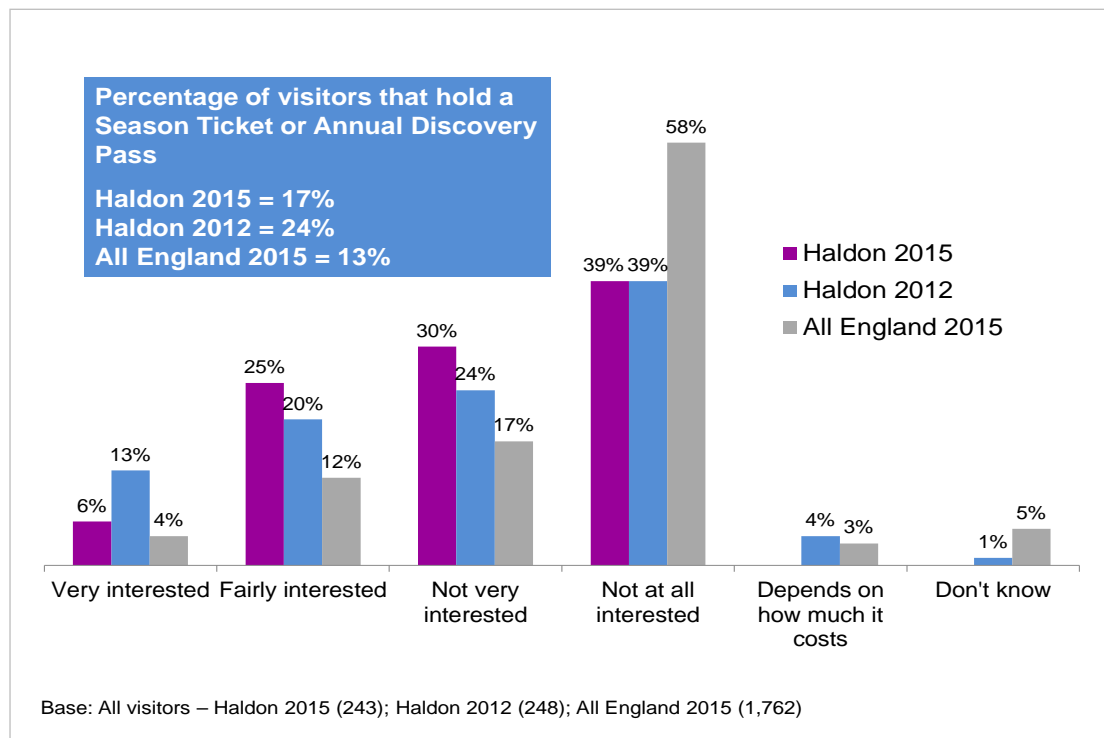
Just over one in six (17%) of visitors to Haldon held a season ticket or annual Discovery Pass; this was slightly higher than the all England average (13%) but was considerably lower than the proportion in the 2012 survey (24%).

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 Haldon on purchasing an Annual Discovery Pass were significantly higher than the all England average, with 31% saying they were interested (6% very interested and 25% fairly interested). Only 16% on average said they were interested across 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 Haldon in 2015.


Most of the visitors interviewed were therefore not interested in purchasing an Annual Discovery Pass (69%) 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	B01326-3 NRW / FCE Quality of Visitor Experience – Year 3 FINAL	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>	1 2 3 4 5
<p>Road signs Just passing / en route Map Smartphone app Facebook</p>	6 7 8 9 A
<p>Twitter Forestry Commission website Natural Resources Wales website Google / other search engine Other website (please specify) _____</p>	B C D E X
<p>Other (please specify) _____ Don't know / can't remember</p>	(59-62m) X M
<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>	1 2 3 4
<p>Wildlife / bird watching Fresh air / being outside Exercise / keeping fit Activities that are good for the children</p>	5 6 7 8
<p>Close to home / convenient Opportunity to spend time with family / friends Safe environment Lots to see and / or do</p>	9 A B C
<p>Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after The weather</p>	D E F G
<p>Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money</p>	H I J K
<p>Other (please specify) ----- ----- Nothing Don't know</p>	(67-70m) L M

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

HALDON

ASK ALL

SHOWCARD G10

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	Café / restaurant / catering	A
B	Car parking	C
C	Cycle hire	E
D	Cycle trails	F
E	Disabled toilets	G
F	Events	J
G	Forest Segway	L
H	Go Ape!	N
		(109-112m)
I	Horse riding	4
J	Information available / interpretation	5
K	Orienteering / Geocaching	A
L	Parking charge	B
M	Picnic areas / BBQ	C
N	Play areas and equipment	E
O	Toilets	K
P	Viewpoint	M
Q	Walking trails	O
		(113-116m)

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

HALDON

ASK ALL

SHOWCARD G10 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	Café / restaurant / catering	A	1	2	3	4	5	6	7	(149)
B	Car parking	C	1	2	3	4	5	6	7	(151)
C	Cycle hire	E	1	2	3	4	5	6	7	(153)
D	Cycle trails	F	1	2	3	4	5	6	7	(154)
E	Disabled toilets	G	1	2	3	4	5	6	7	(155)
F	Events	J	1	2	3	4	5	6	7	(158)
G	Forest Segway	L	1	2	3	4	5	6	7	(160)
H	Go Ape!	N	1	2	3	4	5	6	7	(162)
		(129-132m)								
I	Horse riding	4	1	2	3	4	5	6	7	(167)
J	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
K	Orienteering / Geocaching	A	1	2	3	4	5	6	7	(173)
L	Parking charge	B	1	2	3	4	5	6	7	(174)
M	Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
N	Play areas and equipment	E	1	2	3	4	5	6	7	(177)
O	Toilets	K	1	2	3	4	5	6	7	(183)
P	Viewpoint	M	1	2	3	4	5	6	7	(185)
Q	Walking trails	O	1	2	3	4	5	6	7	(187)
		(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

- 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

- 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)
B01326-3	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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