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# Research Report

Quality of the Visitor  
Experience 2015

Kielder Forest



Prepared for:  
Natural Resources Wales /  
Forestry Commission England

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# 1. Executive summary

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## 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 244 visitor interviews conducted at Kielder 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 Kielder Forest

Kielder Forest is a large forestry plantation in Northumberland and at 250 square miles is England's largest man-made woodland. However, at any one time, a quarter of Kielder Forest is open space which includes England's largest blanket bog. The majority of the forest lies within The Border Forest Park with the southern tip, known as Wark Forest, lying within Northumberland National Park. Kielder Forest is also England's most important red squirrel reserve and is home to the biggest remaining population of red squirrels in the country.

Kielder Forest includes a maze, one of England's largest mountain bike trail network and is home to Northumberland's only breeding osprey population.

## 1.3 Perceptions of the site

Perceptions of Kielder as a place to visit were very positive. None of the visitors interviewed at Kielder in 2015 gave a negative rating for the site, as over nine in ten visitors said it was excellent or very good (93%). However, there was a significant drop in the proportion rating the site as 'excellent' since 2012, when 50% said it was excellent compared to 39% in 2015. The

'excellent' rating for Kielder was, however, higher than the all England average of 32%.

Similarly, ratings of how safe and welcoming Kielder was seen to be were very positive. Again, none of the visitors interviewed at Kielder gave a less than positive rating of the site in terms of it being safe and welcoming, whilst over two fifths said it was 'excellent' (43%): higher than the all England average (36%). The vast majority of visitors had said the site was 'excellent' or 'very good' (91%) which was higher than in 2012 when 83% rated the site as 'excellent' or 'very good'.

When asked whether they would be likely to recommend Kielder as a place to visit to a friend or relative (using a score of 0-10), scores for Kielder and all England sites generally were extremely positive: only 16% gave a rating of less than 9/10 for Kielder, and over two fifths gave the site 10 out of 10 (43%). The proportion of visitors giving the highest score had decreased by 19% since 2012 (from 62% to 43%). This was reflected in the overall mean scores for the site as Kielder's average rating in 2012 was 9.2 which was slightly higher than the average in 2015 (9.14). The 2015 average was identical to the all England average (also 9.14).

#### **1.4 Strengths of the site**

The peace / tranquillity / relaxing atmosphere stood out as being visitors' favourite aspect of the Kielder Forest, as just over three quarters of visitors mentioned it (78%). This proportion had doubled since the 2012 survey when 40% said peace / tranquillity / relaxation and it was considerably higher than the all England average of 30%.

Other popular mentions included the scenery / views (55%), the walks / paths / trails (31%), fresh air / being outside (15%), exercise / keeping fit (14%) and the cycle trails / opportunity to cycle (13%).

#### **1.5 Areas for improvement**

Half the visitors to Kielder could not think of anything that would add to their enjoyment and only made positive comments (50%); 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 suggested by just over

one in ten visitors (11%), and that was better parking facilities (i.e. easier, cheaper / free, more spaces).

The other suggestions were made by fewer than 10% of visitors: better weather / more sunshine (9%), improve café / catering facilities (5%) and more activities for the children (4%).

## 1.6 Visitor profile

In 2015 a third of visitors to Kielder were first-time visitors (32%), which has increased since 2012 (23%) and was higher than the all England average of 24%. Two thirds of visitors to Kielder were, therefore, repeat visitors in 2015 (68%).

Typically across all England sites, 85% were 'day trippers' and 14% were staying visitors. The split between 'day trippers' and staying visitors was more even at Kielder where 56% were day trippers and 43% staying visitors. Kielder had significantly fewer local visitors in 2015 (50%) compared to the all England average (74%) but it is similar to the 2012 research when 47% said they had travelled less than three hours to reach the site. Over half of those visitors who said they would be staying overnight were visiting as part of a longer holiday (27%).

Group sizes were slightly larger at Kielder (averaging 3.64 people) compared to the all England average (3.23 people). Just over two fifths of visitors to Kielder were there with children (43%). This proportion has increased since the 2012 research (31%) but is lower than the all England average (48%).

The gender profile at Kielder was slightly skewed towards women as 55% of visitors at Kielder were female and 45% were male. This is similar 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, Kielder visitors were slightly older than the all England average. Kielder visitors were more likely to be over 45 years old: just over half of visitors at Kielder were 45 or over (55%), whilst just over two fifths of them were aged under 45 (45%). Across England sites, the split was more even - 51% under 45, 48% over 45.

Visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 69%) than C2DE (skilled and unskilled manual workers and the unemployed = 30%). This was exactly the same as the all

England average (69% ABC1, 30% C2DE). NB 1% refused to answer this question at Kielder hence the total not equalling 100%.

Just over a third of visitors to Kielder had children in the household (36%), which was lower than the all England average (47%). This reflects the higher proportion of visitors to the site who are over 45.

Almost all of the visitors to Kielder were white British / Welsh / Irish (99%), with only a very small number of visitors describing their ethnicity as 'White Other European' (<1%) or 'Black / Asian / Mixed' (<1%).



## 2. Introduction

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### 2.1 Background

The woodland estates 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 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
<b>TOTAL</b>	<b>1,762</b>	<b>TOTAL</b>	<b>1,188</b>

\* 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 Kielder, interviewing took place between 30<sup>th</sup> of March and 25<sup>th</sup> October, and a total of 244 interviews were conducted.

## **2.3 Report**

This report summarises the results of the interviews undertaken at Kielder 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

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#### 3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Kielder. 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 Kielder was largely in line with that of the visitors to all the England sites.

The gender profile at Kielder was slightly skewed towards women as 55% of visitors at Kielder were female and 45% were male. This is similar 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, Kielder visitors were slightly older than the all England average. Kielder visitors were more likely to be over 45 years old: just over half of visitors at Kielder were 45 or over (55%), whilst just over two fifths of them were aged under 45 (45%). Across England sites, the split was more even - 51% under 45, 48% over 45.

Visitors tended more towards the ABC1 socio-economic groups (professional and non-manual workers = 69%) than C2DE (skilled and unskilled manual workers and the unemployed = 30%). This was exactly the same as the all England average (69% ABC1, 30% C2DE). *NB 1% refused to answer this question at Kielder hence the total not equalling 100%.*

Just over a third of visitors to Kielder had children in the household (36%), which was lower than the all England average (47%). This reflects the higher proportion of visitors to the site who are over 45.

Almost all of the visitors to Kielder were white British / Welsh / Irish (99%), with only a very small number of visitors describing their ethnicity as 'White Other European' (<1%) 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 Kielder – see Table 2 overleaf for more details.

**Table 2: Profile of visitors by key demographics 2015**

		Kielder %	All England %
<b>Gender</b>	Male	45	47
	Female	55	53
<b>Age</b>	16 - 24	4	4
	25 - 34	14	17
	35 – 44	26	30
	45 – 54	22	22
	55 – 64	23	14
	65+	10	12
<b>Social class</b>	AB	39	37
	C1	30	32
<b>Working status</b>	C2	23	20
	DE	7	10
	Refused	<1	1
	Full-time employee (30+ hours per week)	55	54
	Part-time employee (<30 hours per week)	15	17
	Self-employed	4	4
	Full-time education	2	2
	Unemployed	<1	1
	Permanently sick / disabled	1	1
	Retired	16	15
	Looking after home	5	5
	Other	<1	<1
	Refused	1	1
<b>Limiting illness</b>	Yes – limited a lot	1	1
	Yes – limited a little	5	4
	No	93	94
	Refused	1	1
<b>Children in household</b>	Yes	36	47
	No	64	53
	Refused	-	<1
<b>Ethnicity</b>	White – British / Welsh / Irish	99	96
	White – Other	<1	2
	Black / Asian / Mixed	<1	2
	Refused	-	<1

Base: All visitors – Kielder (244); All England (1,762)

### 3.2 Group profile

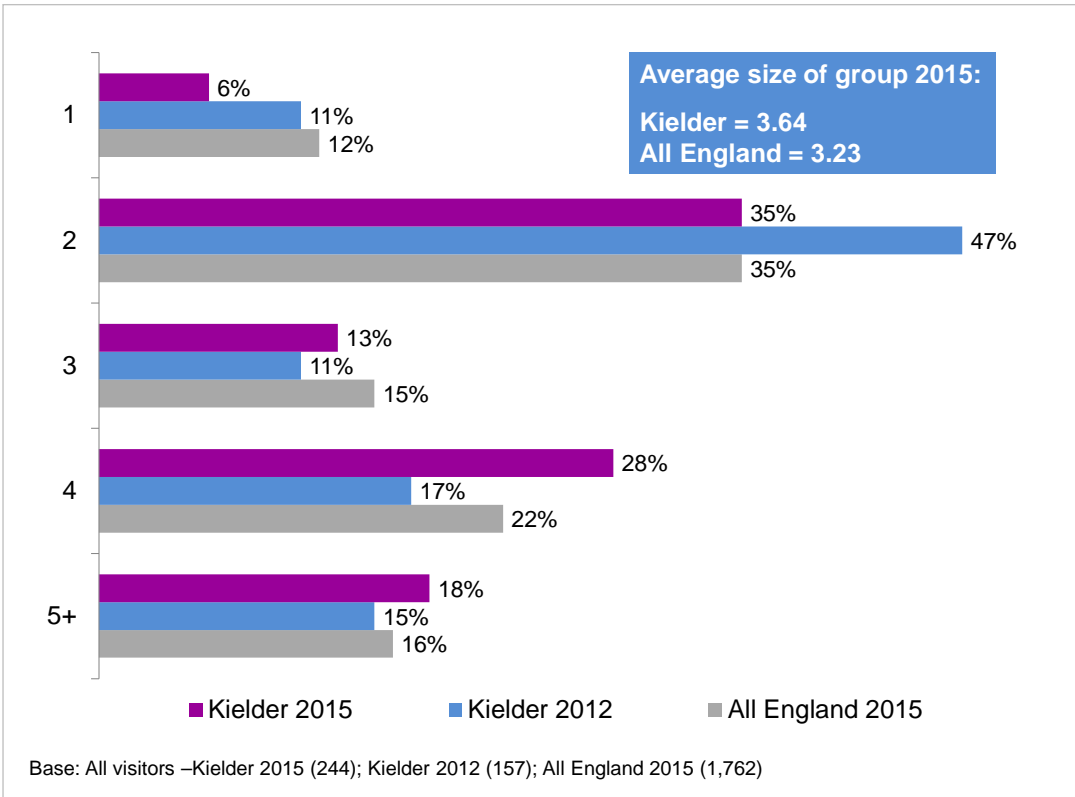
#### 3.2.1 Size of group

Group sizes were slightly larger at Kielder (averaging 3.64 people) compared to the all England average (3.23 people).

Visitors at Kielder in 2015 were more likely to visit in pairs (35%): this is in line with the all England average (also 35%) but it has decreased since the 2012 research when 47% of visitors had visited the site in pairs. The larger average group size at Kielder in 2015 can be attributed to the increase in the proportion of visitors visiting Kielder in groups of 4 or more people. (46% in 2015 compared with 32% in 2012 and 38% average across all England sites).

Just 6% were visiting Kielder alone, a drop from 11% in 2012, which was more in line with the all England average which was 12%.

Figure 1: Q1. Total size of the group



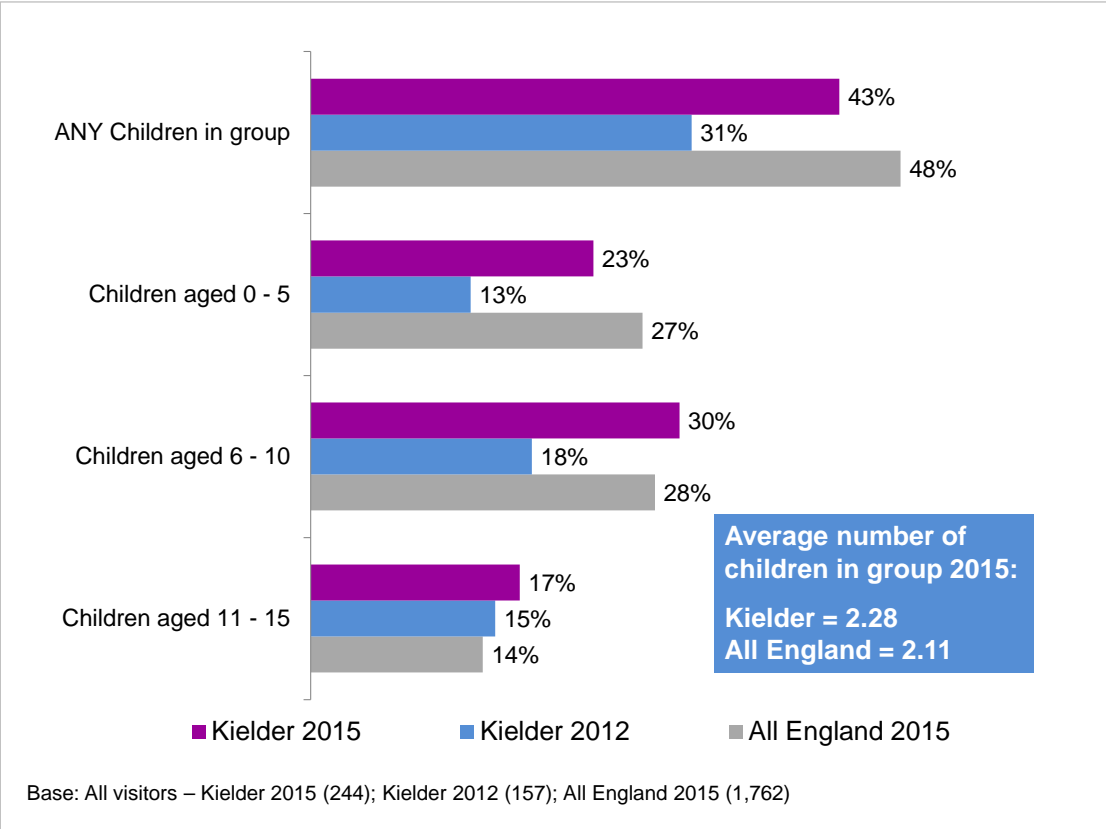
### 3.2.2 Composition of group

Just over two fifths of visitors to Kielder were there with children (43%). This proportion has increased since the 2012 research (31%) but is lower than the all England average (48%).

Even though the proportion of groups visiting Kielder with children was slightly lower than the all England average, the average number of children per group was higher than the all England average (mean of 2.28 children per group at Kielder compared with 2.11 all England).

The ages of children in the groups were largely consistent with the all England findings but the proportion of children under 10 years old had increased from 31% in 2012 to 53% in 2015.

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



## 4. Profile of visit

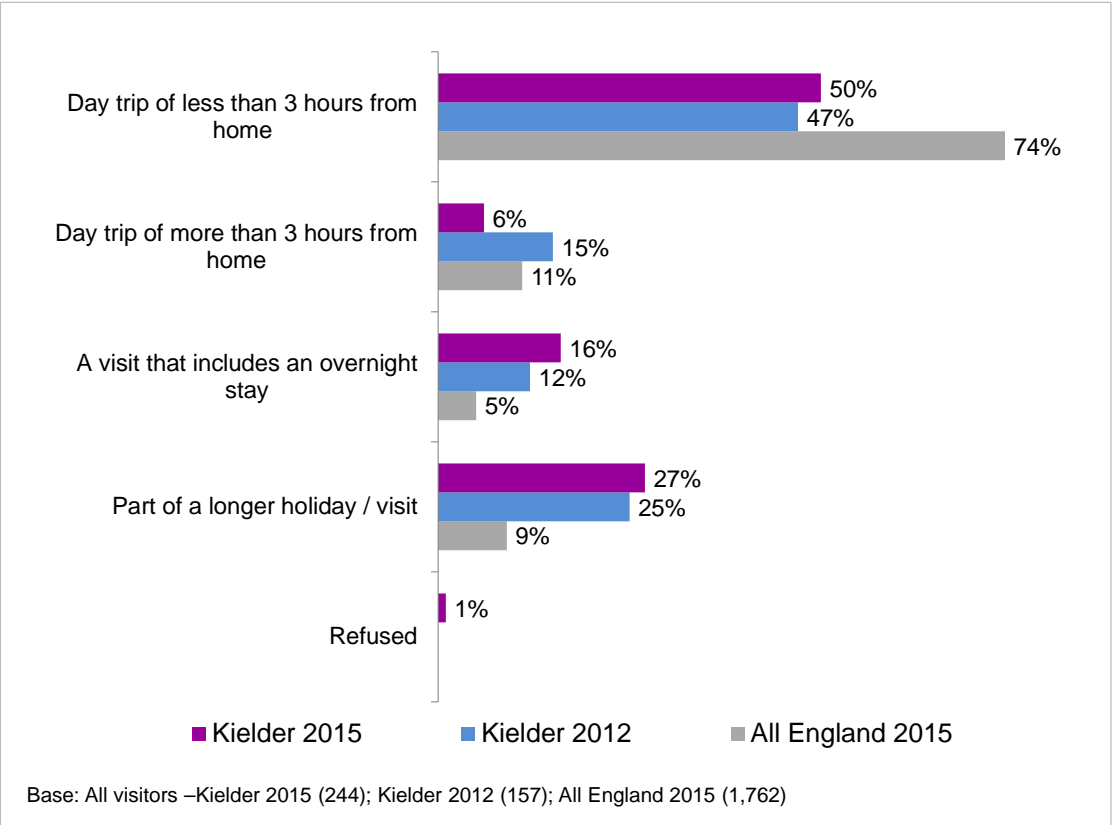
### 4.1 Type of visit

Typically across all England sites, 85% were 'day trippers' and 14% were staying visitors. The split between 'day trippers' and staying visitors was more even at Kielder where 56% were day trippers and 43% staying visitors.

Kielder had significantly fewer local visitors in 2015 (50%) compared to the all England average (74%) but it is similar to the 2012 research when 47% said they had travelled less than three hours to reach the site.

The proportion of Kielder visitors reporting that they would be staying overnight in the area had increased in 2015 from 37% in 2012 to 43% in 2015 which was significantly higher than the all England average (14%). Over half of those visitors who said they would be staying overnight were visiting as part of a longer holiday (27%).

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 majority of visitors to Kielder had travelled from within England and two thirds of those visitors came from North East England (66%). The bulk of the remaining English visitors had come from Yorkshire & Humberside and North West of England (9% from both). Small numbers had come from outside of England (6% from Scotland and <1% from Abroad).

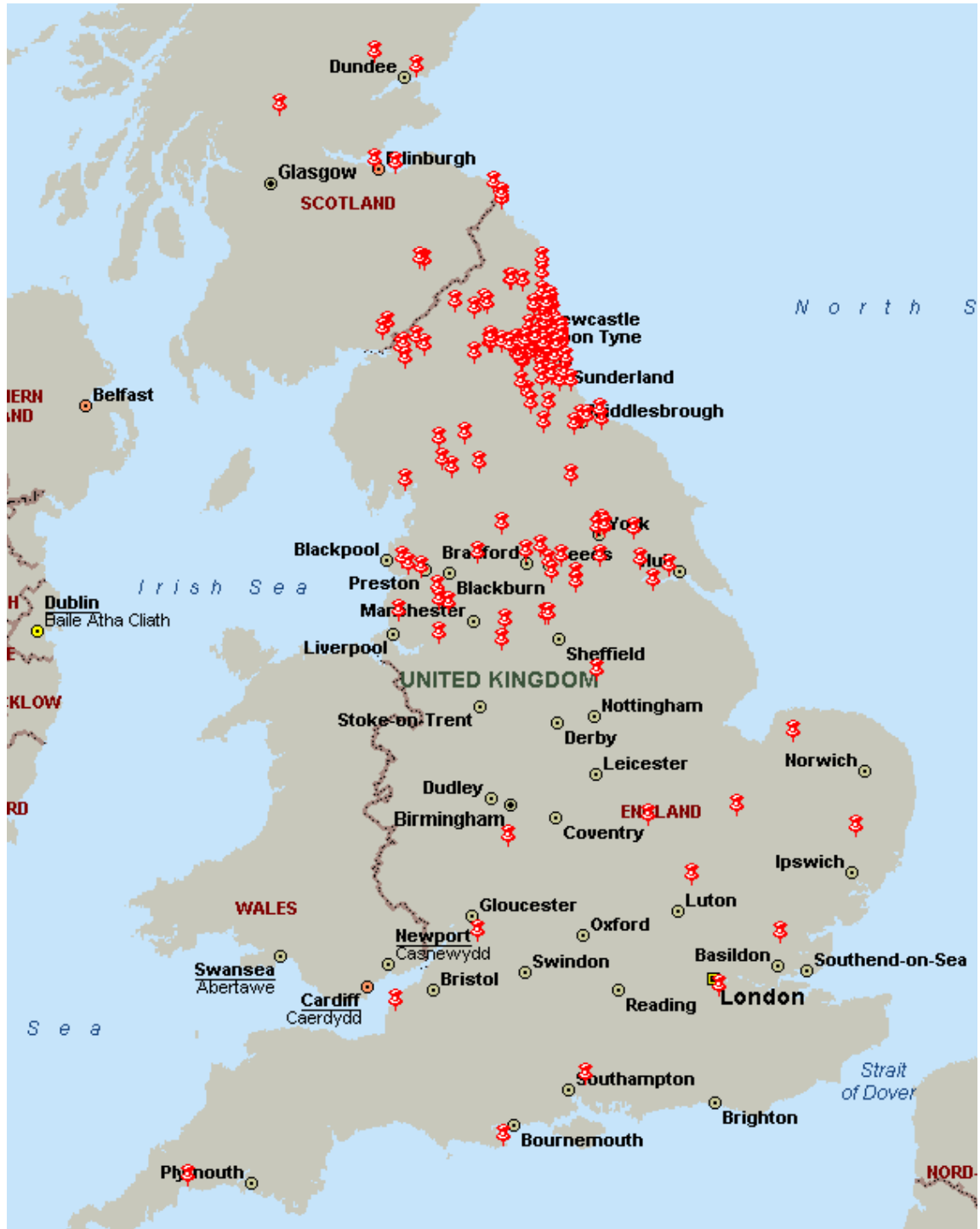
Table 3 below and Figure 4 overleaf provide more details.

**Table 3: Q28a. Visitor origin 2015**

		Kielder %	All England %
<b>Home region</b>	North East England	66	11
	Yorkshire & Humberside	9	11
	North West England	9	2
	West Midlands	2	14
	East Midlands	1	24
	East of England	2	4
	Greater London	<1	1
	South East England	1	17
	South West England	3	13
<b>Home nation</b>	England	93	98
	Wales	-	<1
	Rest of UK	6	1
	Abroad	<1	<1

Base: All visitors – Kielder (244); All England (1,762)

Figure 4: Map of visitor origin for Kielder



### 4.3 Frequency of visits

#### 4.3.1 First-time visitors

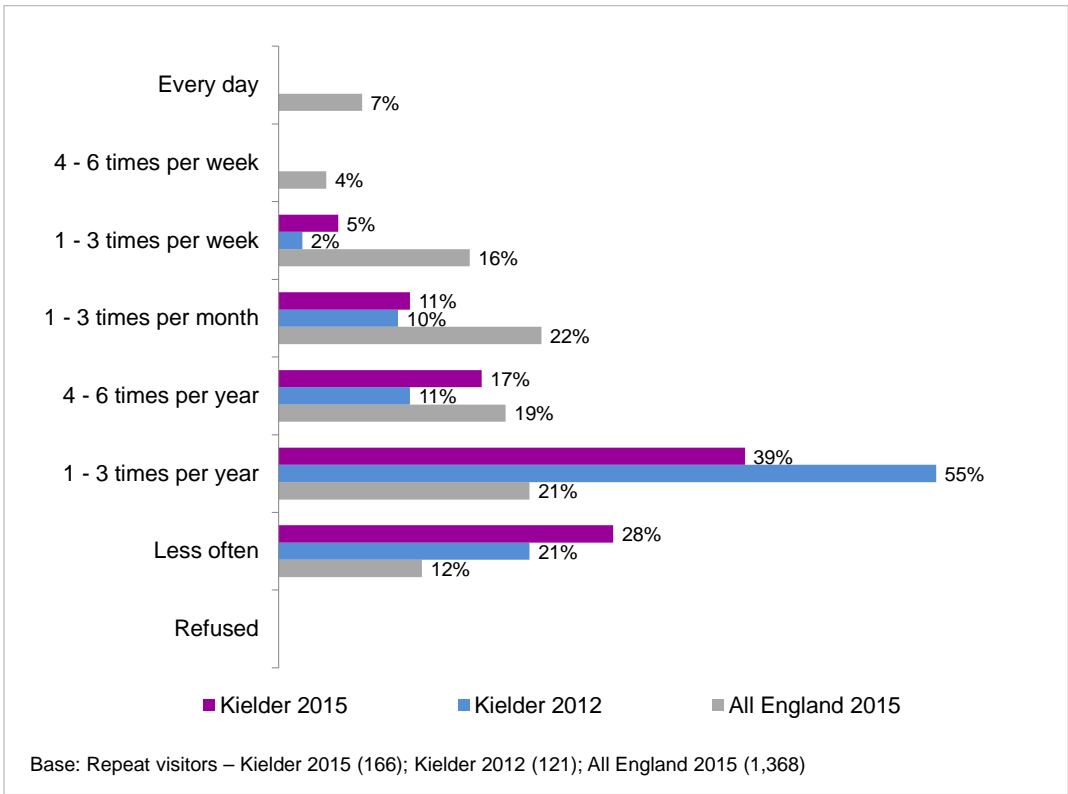
In 2015 a third of visitors to Kielder were first-time visitors (32%), which had increased since 2012 (23%) and was higher than the all England average of 24%. Two thirds of visitors to Kielder were, therefore, repeat visitors in 2015 (68%).

#### 4.3.2 Repeat visitors

Focussing on the repeat visitors, the majority would be classified as infrequent visitors, visiting the site 4 – 6 times a year or less often (84%). Only one in six visitors, therefore, visited the site monthly or more often (16%).

This is largely in line with the 2012 survey, although the proportion of regular visitors is lower than the all England average where over a quarter of visitors said they visited the site monthly or more often.

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



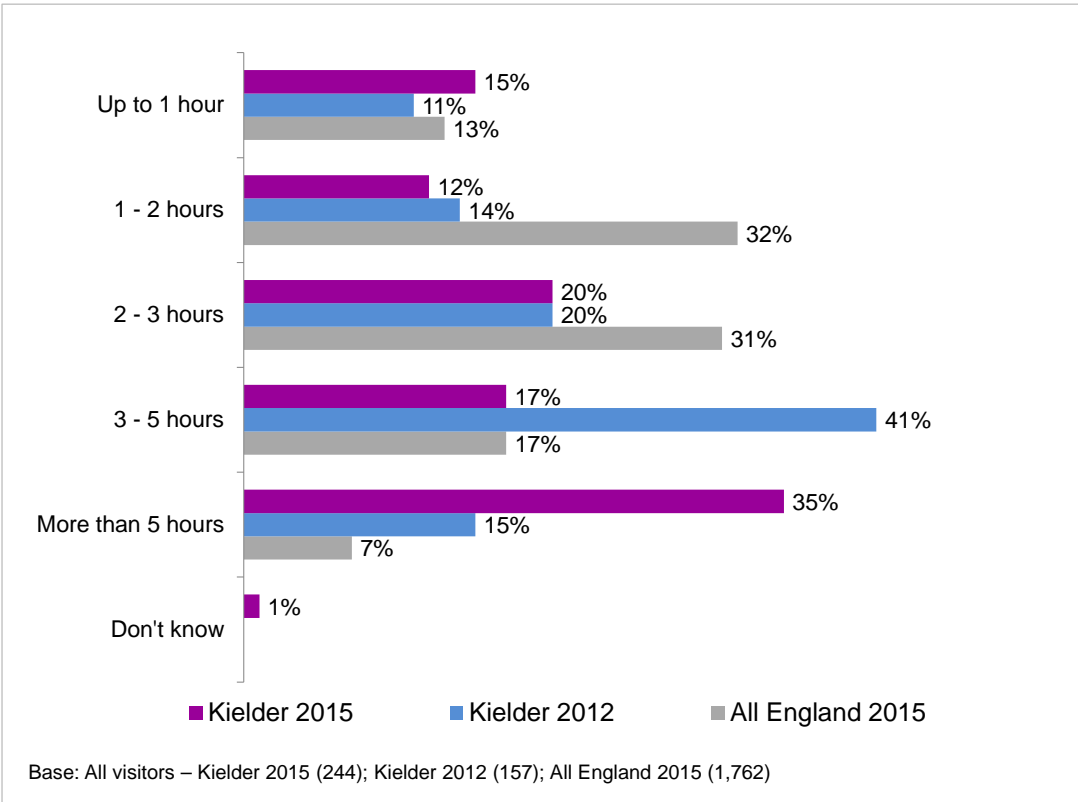
#### 4.4 Length of visit

The average length of visit was 27 minutes longer at Kielder in 2015 than in 2012, with visitors spending, on average, 3 hours and 36 minutes at the site. The average length of stay across all sites in England was considerably shorter, at 2 hours and 26 minutes.

The increase in the average length of visit at Kielder in 2015 can be attributed to the significant increase in the proportion of visitors saying they had been at the site for longer than five hours (35% in 2015 compared to 15% in 2012 and 7% across the all England sites).

Visitors to other sites across England were more likely to spend less than three hours at the sites compared to visitors at Kielder in both the 2015 and 2012 research (76% on average across all England sites compared to 47% at Kielder in 2015 and 45% in 2012) – see Figure 6 below for more details:

**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 Kielder was walking generally (68%), which was significantly higher than in the 2012 research (45%) but was in line with the all England average (67%). There was a particular increase in the proportion of visitors saying they had been walking on a sign-posted trail in 2015 compared to 2012 (48% in 2015 compared to 33% in 2012).

Conversely, cycling had become less popular at Kielder in 2015 (31%) compared to 2012 (50%); however the proportion of visitors who said they had been cycling was almost identical to the average across all England sites (30%). This decrease in the overall total for cycling was due to the considerable drop in the proportion of visitors who had been cycling on sign-posted trails (21% down from 50% in 2012).

Visiting the café was the second most popular activity at Kielder, with 57% of visitors using it: exactly the same as the 2012 survey and slightly higher than the all England average (54%).

Over one fifths of visitors had been admiring the views (22%), which was lower than in 2012 (31%) but higher than the all England average of 13%. The Visitor Centre / shop had also been used by nearly one fifths of visitors (18%), which was again down slightly from 2012 (22%) but again higher than the all England average of 9%.

Overall, the vast majority of visitors took part in 'active' activities (81%), which is a significant increase on the 2012 average (57%), but is lower than the all England average (94%) - see Table 4 overleaf.

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

	Kielder 2015 %	Kielder 2012 %	All England 2015 %
Cycling on forest roads, tracks or trails	21	50	20
Cycling off trails or tracks	12	10	15
<b>TOTAL CYCLING</b>	<b>31</b>	<b>50</b>	<b>30</b>
Walking on a sign-posted trail	48	33	38
Walking but not following sign-posts	11	15	8
Dog walking	15	13	29
<b>TOTAL WALKING</b>	<b>68</b>	<b>45</b>	<b>67</b>
Using the café / restaurant / other catering	57	57	54
Admiring the views	22	31	13
Using the Visitor Centre / shop	18	22	9
Bird watching	11	6	3
Picnic or barbeque	8	12	7
Using the play area	7	10	25
Seeing something in the forest	6	4	6
Swimming	6	-	1
Running / jogging	5	-	2
Organised event / trip	5	4	1
Nature / natural history visit	4	4	2
Photography	3	15	2
Orienteering / Geocaching	1	1	<1
Other	25	6	6
<b>Taken part in ACTIVE activities</b>	<b>81</b>	<b>57</b>	<b>94</b>

Base: All visitors – Kielder 2015 (244); Kielder 2012 (157); All England 2015 (1,762)

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

## 4.6 Length of time spent on activities

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

As previously mentioned, visits to Kielder lasted 3 hours and 36 minutes on average. Visitors were spending 27 minutes longer on average at the site in 2015 than they did in 2012.

Those walking spent an average of 1 hour and 38 minutes doing so; a 16 minute decrease since 2012, when the average time spent walking was 1 hour and 54 minutes.

The average time spent cycling at Kielder in 2015 was 1 hour and 24 minutes longer than the average walking time, at 3 hours and 2 minutes. However, the time spent cycling was 11 minutes shorter in 2015 as the average cycling duration in 2012 was 3 hours and 13 minutes.

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

	Total duration of visit		Time spent on any walking		Time spent on any cycling	
	2015 %	2012 %	2015 %	2012 %	2015 %	2012 %
Up to 30 minutes	7	4	11	9	-	1
31 – 60 minutes	8	7	24	17	6	1
1 – 2 hours	12	14	31	38	24	7
2 – 3 hours	20	20	27	15	30	37
3 – 5 hours	17	41	4	20	17	46
5+ hours	35	15	1	-	17	6
Don't know	1	-	-2	-	7	1
<b>AVERAGE</b>	<b>3 hrs 36 mins</b>	<b>3 hrs 9 mins</b>	<b>1 hr 38 mins</b>	<b>1 hr 54 mins</b>	<b>3 hrs 2 mins</b>	<b>3 hrs 13 mins</b>

Base: All respondents - 2015 (244); 2012 (157), Respondents who walked - 2015 (147); 2012 (71), Respondents who cycled – 2015 (54); 2012 (71)

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

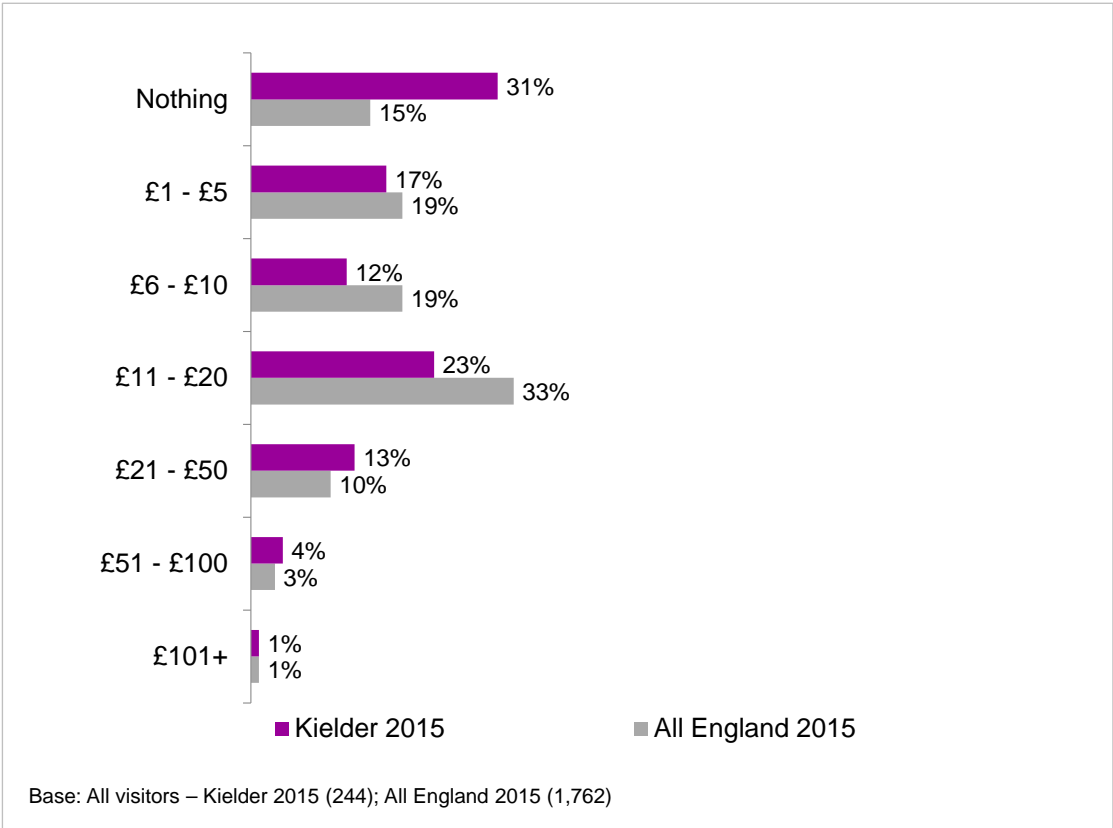
Visitors to Kielder were asked how much they intended to spend during their visit at the site on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. Figure 7 shows the figures calculated by combining the data across all types of intended spending.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

Almost a third of visitors said they did not intend to spend any money at the site (31%), which was higher than the all England average (15%).

Around one in five visitors had planned to spend over £21 on their visit (18%), which represents a higher spend than typically recorded, with less than one in six visitors spending over £21 on their visit on average across the all England sites (14%).

Overall, the average spend at Kielder was very similar to the average at all England sites at £14.91 (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 Kielder was likely to spend on was food and drink, with almost three in five visitors planning to spend on this (59%). The average planned spend on food and drink was £15.30, more than the all England average of £8.32.

*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 parking; almost half of visitors (45%) were likely to spend on parking, with an average spend of £3.09. This was similar to the all England average (£3.01).

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

	% spending anything on items		Average spend on items £	
	Kielder %	All England %	Kielder £	All England £
Food and drink	59	65	£15.30	£8.32
Parking	45	71	£3.09	£3.01
Souvenirs / gifts	7	5	£0.82	£0.50
Activities at the site	2	5	£0.65	£3.09
Hiring equipment	1	2	£0.29	£0.56
Anything else	<1	2	£0.027	£0.32

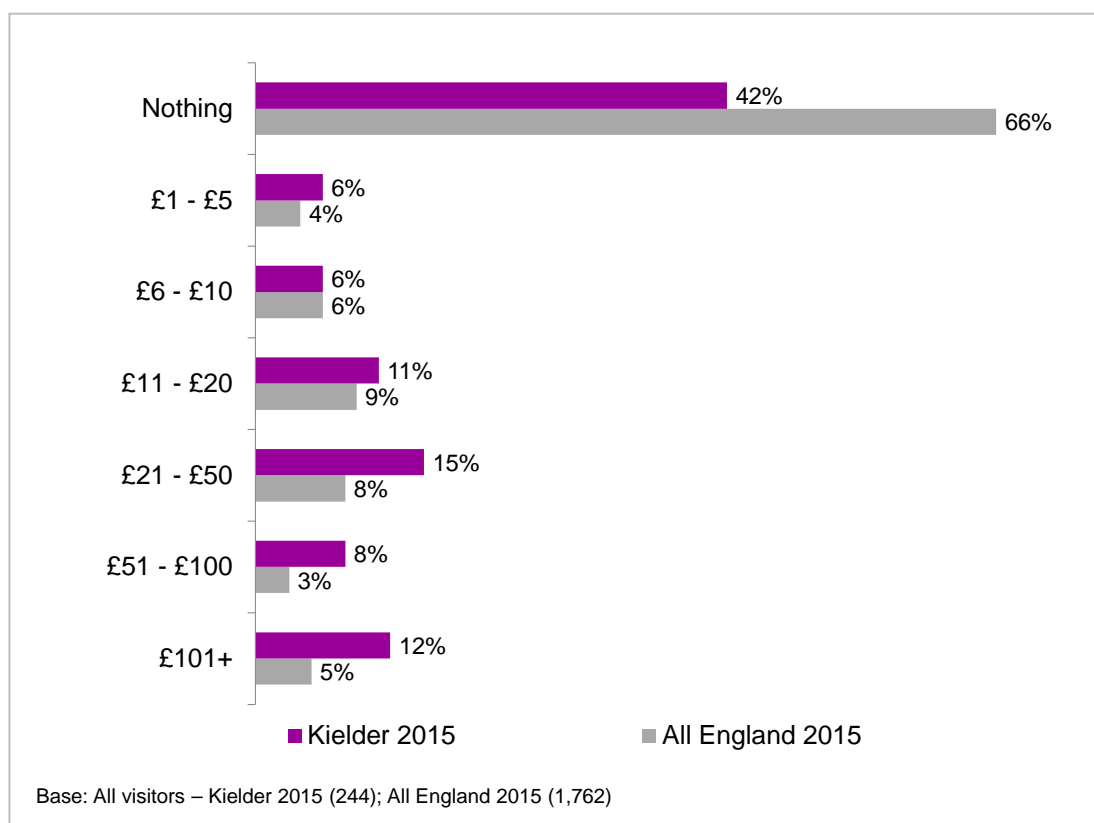
Base: All visitors – Kielder 2015 (244); All England 2015 (1,762)

Visitors to Kielder 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.

Two fifths of visitors to Kielder said that they would not be spending any money in the local area as a result of their trip (42%); this was considerably lower than the all England average (66%).

The average intended spend in the area was £79.25, which is significantly higher than the all England sites' average of £31.32.

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



Looking at individual spend in the local area as a result of their visit to Kielder, food and drink and parking were the main areas of intended spending: 48% planned to spend on food and drink (average of £41.53) and 34% would spend on parking (average of £3.12).

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

	% spending anything on items		Average spend on items £	
	Kielder %	All England %	Kielder £	All England £
Food and drink	48	25	£41.53	£10.02
Parking	34	19	£3.12	£1.26
Transport	25	11	£9.80	£3.47
Accommodation	12	5	£67.48	£14.69
Souvenirs / gifts	6	4	£1.50	£1.61
Admissions to other attractions	1	3	£1.02	£1.16
Hiring equipment	<1	1	£0.07	£0.40
Anything else	<1	5	£0.35	£2.35

Base: All visitors – Kielder 2015 (244); All England 2015 (1,762)

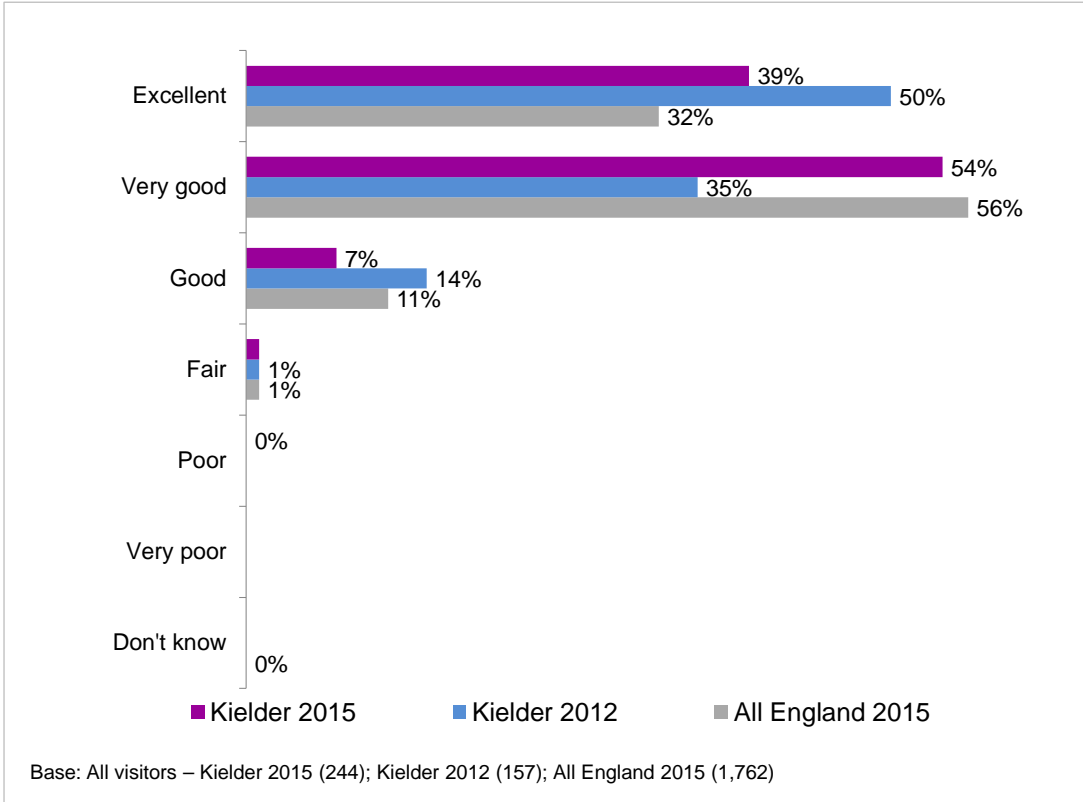
## 5. Perceptions of the site

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

Perceptions of Kielder 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 Kielder in 2015 gave a negative rating for the site, as over nine in ten visitors said it was excellent or very good (93%). However, there was a significant drop in the proportion rating the site as 'excellent' since 2012, when 50% said it was excellent compared to 39% in 2015. The 'excellent' rating for Kielder was, however, 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%, and 1% rated the site as fair.

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

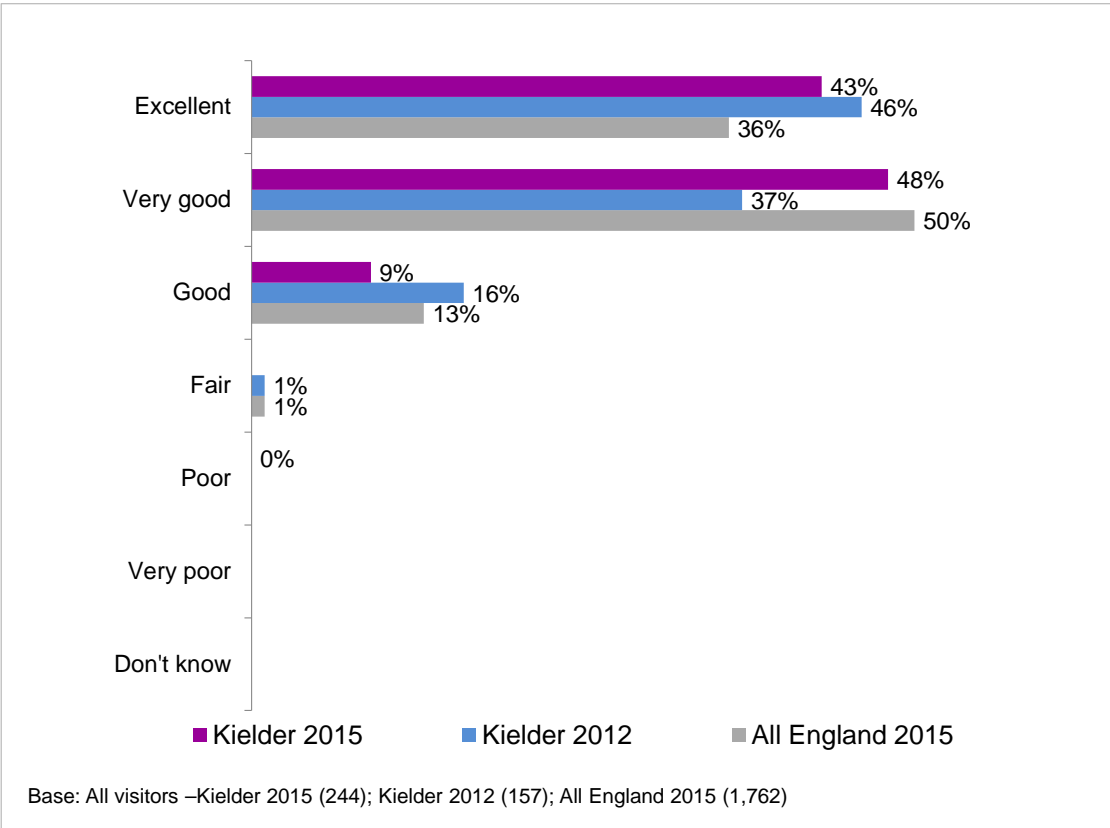


### 5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Kielder 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 Kielder gave a less than positive rating of the site in terms of it being safe and welcoming, whilst over two fifths said it was ‘excellent’ (43%): higher than the all England average (36%). The vast majority of visitors had said the site was ‘excellent’ or ‘very good’ (91%) which was higher than in 2012 when 83% rated the site as ‘excellent’ or ‘very good’.

**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 Kielder and all England sites.

When asked why they gave Kielder a positive rating, visitors were most likely to mention the scenery / views/ beautiful environment (91%). Less than half that proportion mentioned the views on average across all the England sites (41%).

Other popular mentions included: a peaceful / pleasant / tranquil / relaxing atmosphere (52%) and the fresh air / open spaces / freedom (26%).

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**

	Kielder 2015 %	All England 2015 %
The scenery / views / beautiful environment	91	41
Peaceful / pleasant / tranquil / relaxing / welcoming	52	21
Fresh air / open space / plenty of space / freedom	26	24
Good provision of paths / trails and tracks	9	25
Safe environment generally for all people	9	19
Good, safe place for the kids to play / run around	7	22
Good quality facilities / amenities	6	11
Clean / tidy / well maintained / litter free	5	11
Well sign-posted / good maps / information boards	5	13
Live locally / convenient / easy to get to	5	18
Other visitors here are friendly	4	5
Well laid out / well organised / good set up	2	18
Friendly / helpful staff and rangers	2	8

Base: Visitors rating the site as excellent, very good or good – Kielder 2015 (243); All England 2015 (1,743)

Further comments made by one percent of visitors included:

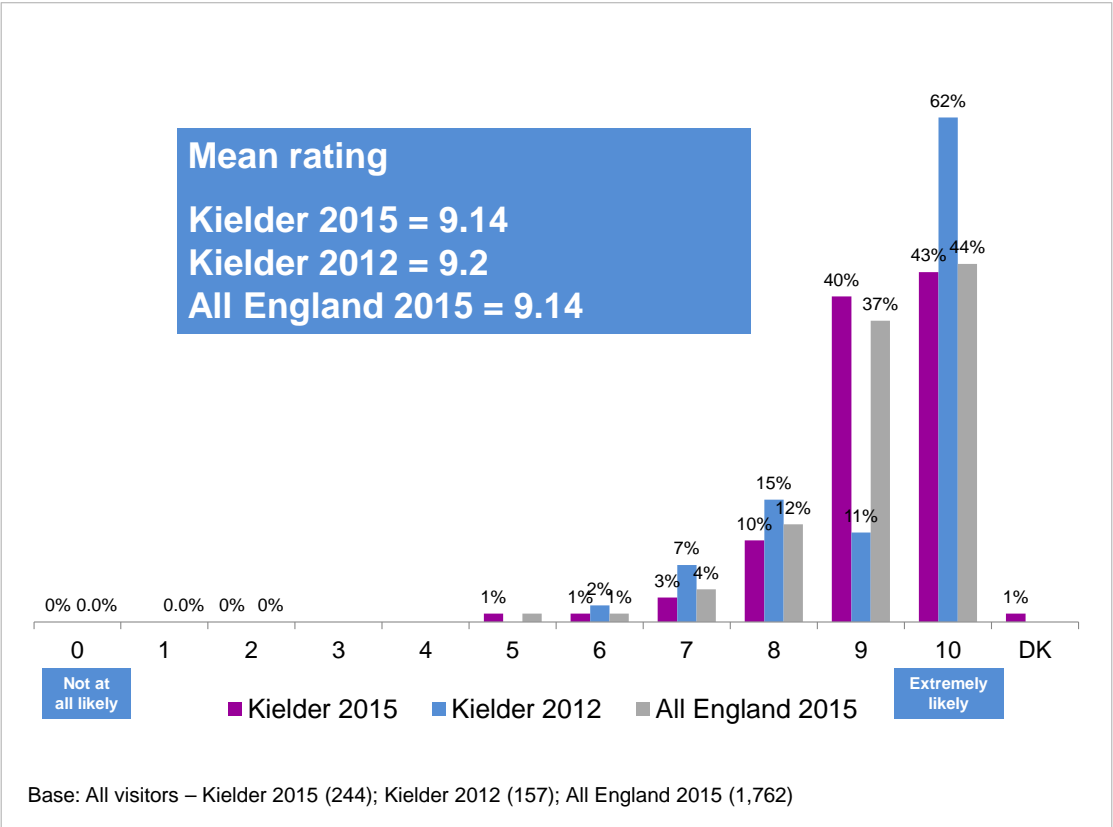
- Wildlife/ birdwatching / nature
- Go Ape!
- Dog friendly
- Plenty to do / has everything you want

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

Visitors were asked whether they would be likely to recommend Kielder 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 Kielder and all England sites generally were extremely positive: only 16% gave a rating of less than 9/10 for Kielder, and over two fifths gave the site 10 out of 10 (43%).

The proportion of visitors giving the highest score had decreased by 19% since 2012 (from 62% to 43%). This was reflected in the overall mean scores for the site as Kielder's average rating in 2012 was 9.2 which was slightly higher than the average in 2015 (9.14). The 2015 average was identical to the all England average (also 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 Kielder in 2015 is 81, which is higher than the scores for both 2012 and the all England average (69 and 78 respectively).

## 5.4 Favourite things about the site

Visitors to Kielder were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 8 below.

The peace / tranquillity / relaxing atmosphere stood out as being visitors' favourite aspect of the Kielder Forest, as just over three quarters of visitors mentioned it (78%). This proportion had doubled since the 2012 survey when 40% said peace / tranquillity / relaxation and it was considerably higher than the all England average of 30%.

Other popular mentions included the scenery / views (55%), the walks / paths / trails (31%), fresh air / being outside (15%), exercise / keeping fit (14%) and the cycle trails / opportunity to cycle (13%).

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

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

Activities	Kielder 2015 %	Kielder 2012 %	All England 2015 %
Peace / tranquillity / relaxation / atmosphere	78	40	30
Scenery / views / beautiful / natural	55	52	29
Walks / paths / trails	31	17	40
Fresh air / being outside	15	8	16
Exercise / keeping fit	14	-	12
Cycle trails / freedom / opportunity to cycle	13	38	22
Wildlife / bird watching	9	7	5
Been before / wanted to come again	9	-	12
Like forests / trees / variety of trees and plants	6	10	16
Lots to see and / or do	5	4	6
Clean / well looked after	5	4	11
Activities that are good for the children	5	6	20
Safe environment generally	5	4	10
Good on-site facilities / BBQ areas / gift shop	5	13	12
Opportunity to spend time with family / friends	4	-	14
Close to home / convenient location	2	4	16
Ideal for dogs / dog friendly / safe for dogs	2	-	5
Friendly people	2	-	1

Base: All visitors – Kielder 2015 (244); Kielder 2012 (157); All England 2015 (1,762)



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

- Helpful / pleasant staff
- Fishing
- Rivers / creeks / waterways
- The weather
- Cost / value for money / free
- Open space / plenty of space
- Not crowded / not too many people
- Go Ape!
- Remote / away from traffic

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

- A higher proportion of women liked the walks / paths / trails (36% compared to 25% of men) and exercise / keeping fit (16% compared to 10% of men).
- The cycle trails were also more popular than average with ABC1 visitors (15% compared to 8% of the C2DE visitors).

## 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.

Half the visitors to Kielder could not think of anything that would add to their enjoyment and only made positive comments (50%); 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 just over one in ten visitors (11%), and that was better parking facilities (i.e. easier, cheaper / free, more spaces).

The other suggestions were made by fewer than 10% of visitors: better weather / more sunshine (9%), improve café / catering facilities (5%) and more activities for the children (4%) – see Table 9 for more details.

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

	Kielder 2015 %	All England 2015 %
<b>Nothing / general positive comments</b>	<b>50</b>	<b>45</b>
Better parking (easier, cheaper, more, free)	11	14
Better weather / more sunshine	9	2
Improve café / catering	5	3
More activities for children / more play areas	4	5
Cheaper cafe	3	1
More trails, paths and cycle tracks	2	5

Base: All visitors – Kielder 2015 (244); All England 2015 (1,762)

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

- Improve toilets / more toilets / shower facilities
- More dog poo bins / remove dog poo
- Provide more café / catering / refreshments
- More activities / sports (tennis courts, football, horse riding)
- More water activities / sports (kayaking etc.)
- Longer opening hours (shop / café)
- Better access / make more accessible (disabled access)
- Bike shop / more shops

When asked if there was anything that interfered with their enjoyment of their visit to Kielder, over two fifths reported that nothing had interfered with their enjoyment (43%): this was lower than the all England average of 57%.

The poor weather was the main factor that had interfered with their enjoyment of the site with 35% of visitors commenting on the wet / rainy / windy weather. Other factors were mentioned by very small proportions of the visitors and they included: the car park is expensive / should be free (6%) and the midges in the café (2%) – see Table 10 below.

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

	Kielder 2015 %	All England 2015 %
<b>Nothing</b>	<b>43</b>	<b>57</b>
Wet / raining / windy (poor weather)	35	11
Car parking expensive / should be free	6	9
Midges (in the café)	2	<1

Base: All visitors – Kielder 2015 (244); All England 2015 (1,762)

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

- Signs unclear / need better signs / more maps
- Poor service in the café / long queues / inconvenient opening hours
- Toilets - not enough / closed / out of order / cleaner toilets needed
- Need more litter bins / recycling bins / too much litter
- Café expensive
- Need more dog poo bins

## 6. Site facilities

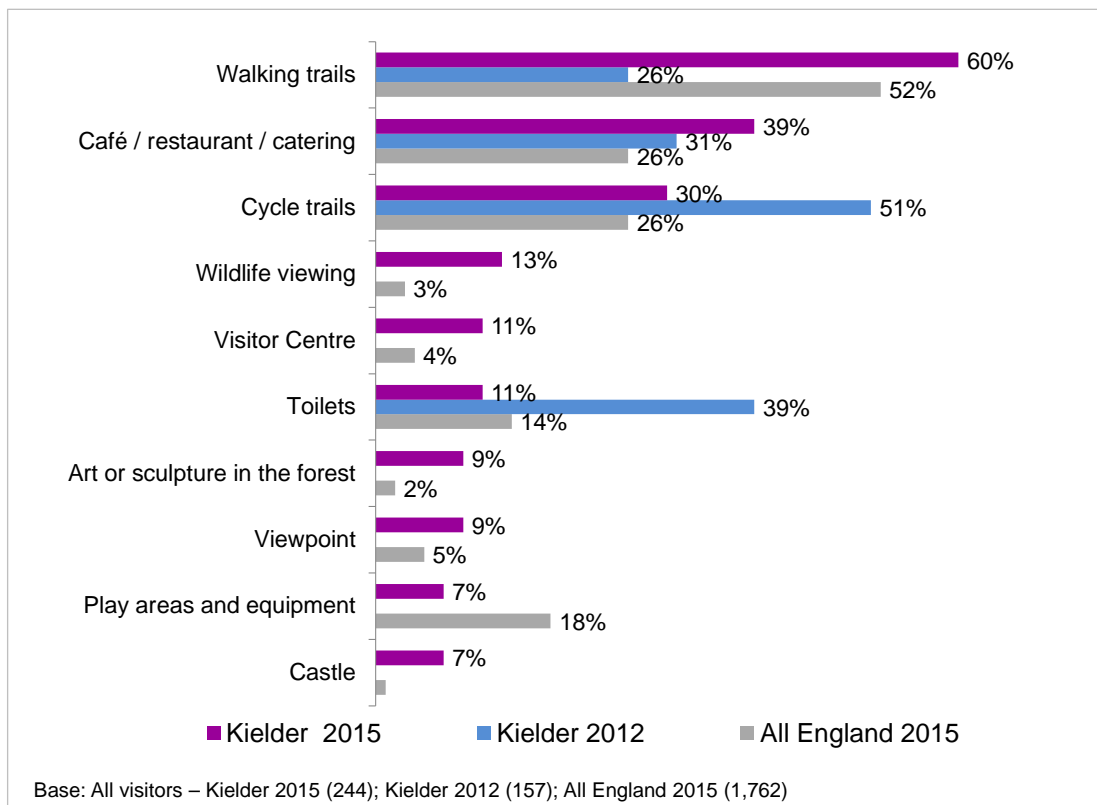
### 6.1 Importance of site facilities

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

The walking trails were mentioned by the highest proportion of visitors (60%); this figure was significantly higher than the 2012 survey (26%) and was slightly higher than the all England average (52%). In contrast to this, the cycling trails were more important at Kielder in 2012 as 51% mentioned the cycle trails, while only 30% mentioned the cycling trails at Kielder in 2015. This was more in line with the all England average of 26%.

The second most important facility at Kielder in 2015 was the café / restaurant / catering (39%). This was less important to visitors in 2012 and at other sites across England on average (31% and 26% respectively). Other important factors mentioned by just over 10% of visitors were the wildlife viewing facility and the Visitor Centre (13% and 11% respectively). These factors were more important at Kielder than average across the all England sites (3% and 4% respectively) while they were not mentioned at all in 2012. – see Figure 12a below.

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

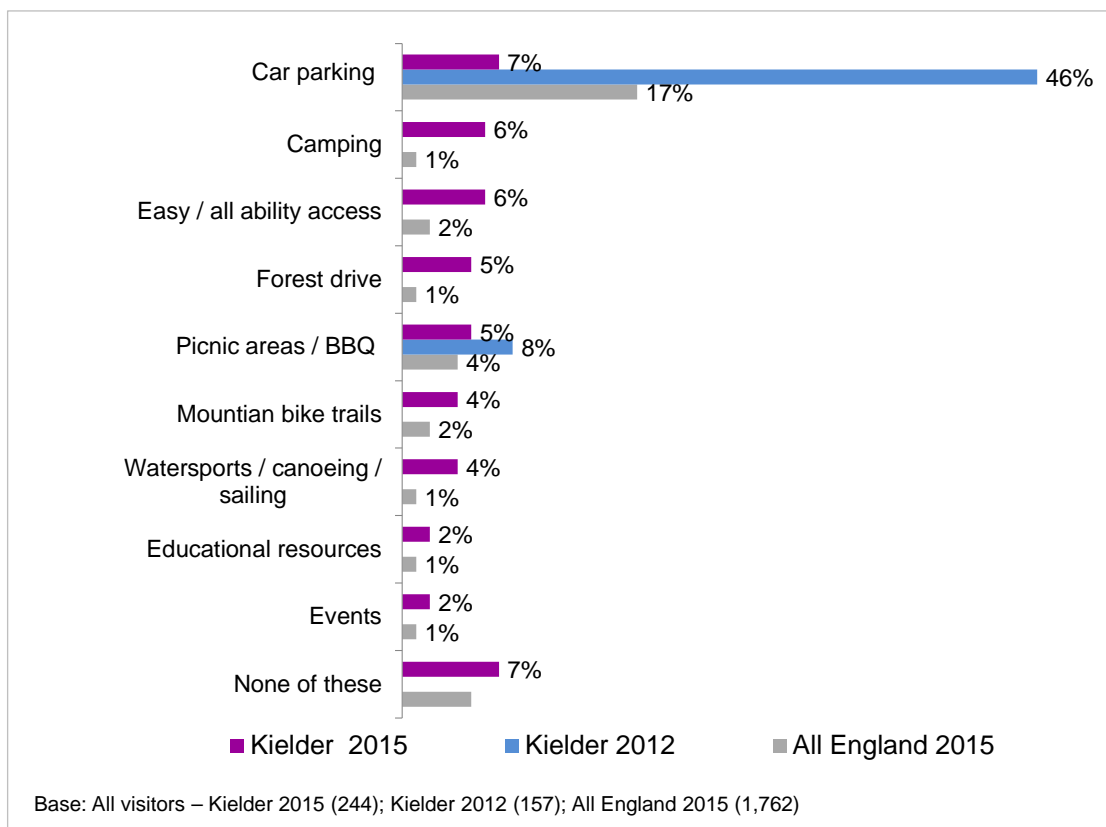


The toilets had decreased in importance since the 2012 survey as only 11% mentioned them in 2015 (compared to 39% in 2012), which was more in line with the all England average of 14%. The other factor that decreased significantly in importance was the car parking facility as only 7% visitors said it had influenced their decision to visit the site. Parking was less important at Kielder than at other England sites (17%) and was considerably less important than in 2012 (46%).

Many of the other facilities mentioned by less than one in ten visitors had not been noted in 2012 at all: art or sculpture in the forest (9%), viewpoint (9%), play areas and equipment and castle (both 7%). These facilities were mentioned by a higher proportion of visitors to Kielder compared to the all England average with the exception of the play areas and equipment which had been mentioned by 18% on average across the other sites.

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

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



Certain other factors (apart from site facilities) were important to just under a quarter of visitors when choosing to come to the site (23%). NB 7% answered *don't know*. Any other factors influencing their visit were therefore mentioned by very small proportions of visitors. The main factor that influenced visitors' decision to go to Kielder in 2015 was the beautiful scenery / views / natural beauty and the relaxing / peaceful tranquil surroundings (4% for each). The other factors mentioned by more than 1% of visitors are outlined below in Table 11:

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

	Kielder 2015 %	All England 2015 %
<b>Nothing</b>	<b>70</b>	<b>69</b>
Beautiful scenery / views / natural beauty	4	2
Relaxing / peaceful / tranquil / quiet	4	1
A day out / nice day out / a good day out	3	2
Dog friendly / dogs can come off leads / dog facilities	2	4
Wanted to go walking / cycling	2	2

Base: All visitors – Kielder 2015 (244); All England 2015 (1,762)

Other factors mentioned by fewer than 2% of visitors included:

- Friend / family / B&B owner recommended it / word of mouth
- Been before / come here a lot / good memories
- Outdoors / fresh air / open spaces
- Meeting / visiting with family and friends
- Close to where I'm staying (staying visitors)

**6.2 Facilities used**

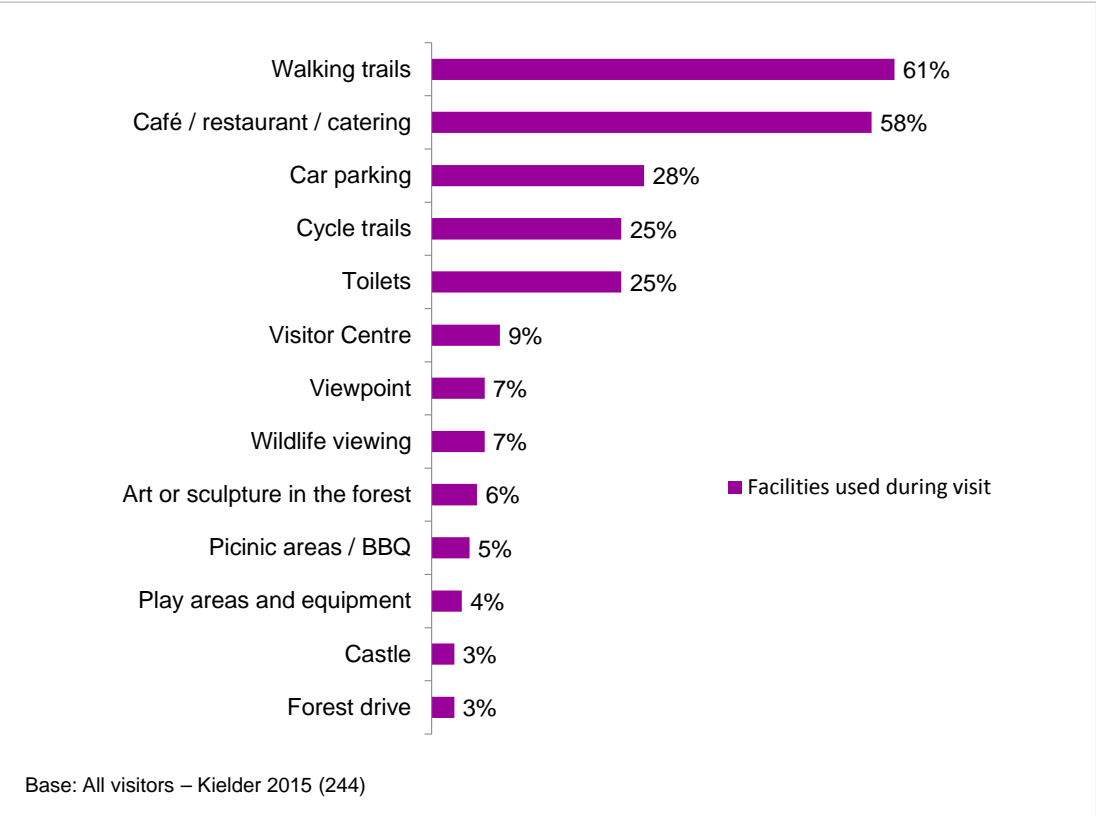
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The walking trails (61%) and the café / restaurant / catering (58%) were used by the highest proportion of visitors.

The car parking facilities, cycle trails and toilets were used by around a quarter of visitors (28%, 25% and 25% respectively).

Other facilities used by less than one in ten visitors can be seen in the Figure 13 below:

**Figure 13: Q15. Facilities used at Kielder 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 Kielder 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 61% rating this facility as ‘excellent’ and nearly all of the remaining users rating it as very good (31%) or good (8%). None of the visitors gave this facility a negative rating.

The walking trails had similarly positive ratings with 46% rating them as ‘excellent’ and 43% rating them as ‘very good’. Ratings for the toilets were also positive, with over half the visitors rating them as ‘excellent’ or ‘very good’ (59%) with the remaining 39% rating them as ‘good’ and only 1% saying ‘fair’.

Slightly fewer visitors rated the café / restaurant / catering as ‘excellent’ (11%) but the ratings were still high with 38% rating them as very good, 32% rating them as good and only 4% giving a negative rating. The car parking facilities on the other hand was not rated as highly as over one in ten visitors who had used this facility had rated it as poor (12%) and a further 49% only gave a rating of ‘fair’ (49%) - see Figure 14 below for more details.

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

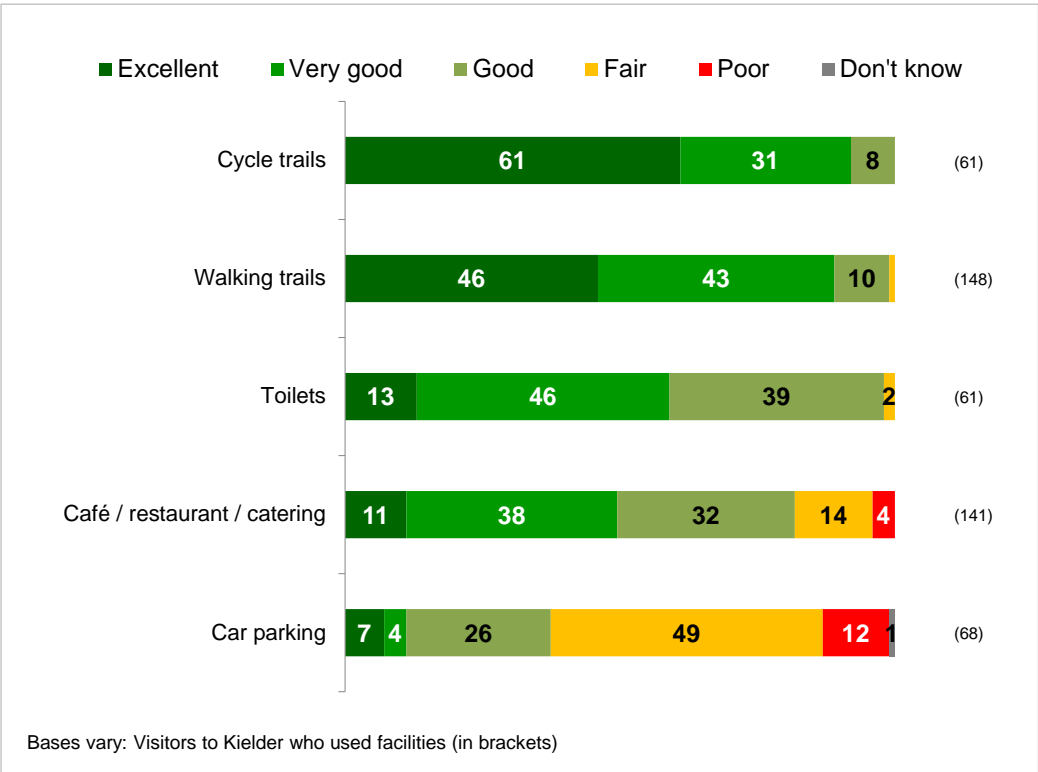




Table 12 compares the proportions giving ‘excellent’ ratings to the facilities used in 2015 compared with 2012, where they were mentioned in the previous survey.

The proportions who gave an ‘excellent’ rating for the cycle trails and the walking trails had increased considerably since 2012 as there was a 24% and a 21% increase respectively.

The rating for the other facilities had gone down however – especially the car parking facility, where there was a 27% decrease in the proportion of visitors rating the facility as ‘excellent’. This was also true to a lesser extent for the café / restaurant / catering facilities and the toilets (decrease of 14% and 6% respectively).

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

Facilities	Kielder 2015 %	Kielder 2012 %	% point change
Cycle trails	61	37	+24
Walking trails	46	25	+21
Toilets	13	19	-6
Café / restaurant / catering	11	25	-14
Car parking	7	34	-27

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 Kielder 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.

Two thirds of visitors (66%) had always known about the site, whilst one fifth (19%) had heard about it through word of mouth. Fewer visitors had heard of the site because of word of mouth in 2015 compared to 2012 when it was 28% of visitors.

Around one in ten became aware of the site online, with 9% mentioning Google / other search engine and 9% mentioning other websites. One in ten had heard of the site through a leaflet as well (9%).

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

	Kielder 2015 %	Kielder 2012 %	All England 2015 %
Always known about it / been here before	66	51	53
Word of mouth	19	25	34
Google / other search engine	9	*	4
Leaflets	9	4	3
Other websites	9	*	2
Tourist Information Centre / Tourist Board	3	2	2
Just passing / en route	2	3	2

Base: All visitors – Kielder 2015 (244); Kielder 2012 (155); 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:

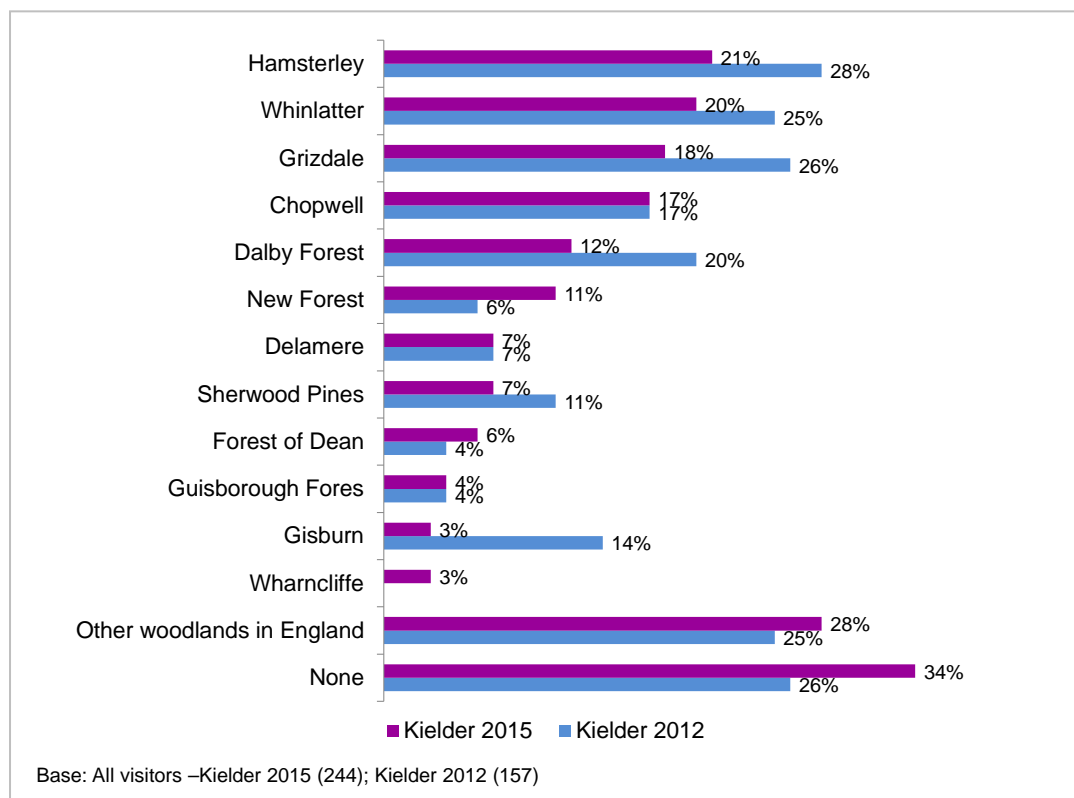
- Newspaper
- Map
- Live Locally

## 7.2 Visiting other sites

Visitors to Kielder 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. A third of visitors had visited at least one other site (66%), although in 2012, 74% had visited another site.

Hamsterley was mentioned by the highest proportion of visitors to Kielder (21%). A further one in five or slightly fewer mentioned Whinlatter (20%), followed by Grizdale (18%) and Chopwell (17%). Just over one in ten visitors had visited Dalby Forest and New Forest (12% and 11% respectively). The other forests listed were mentioned by less than 10% of visitors – 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

- Cannock Chase
- Moors Valley Country Park
- Queen Elizabeth Country Park
- Thetford Forest
- Wyre Forest

## 8. Discovery passes

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

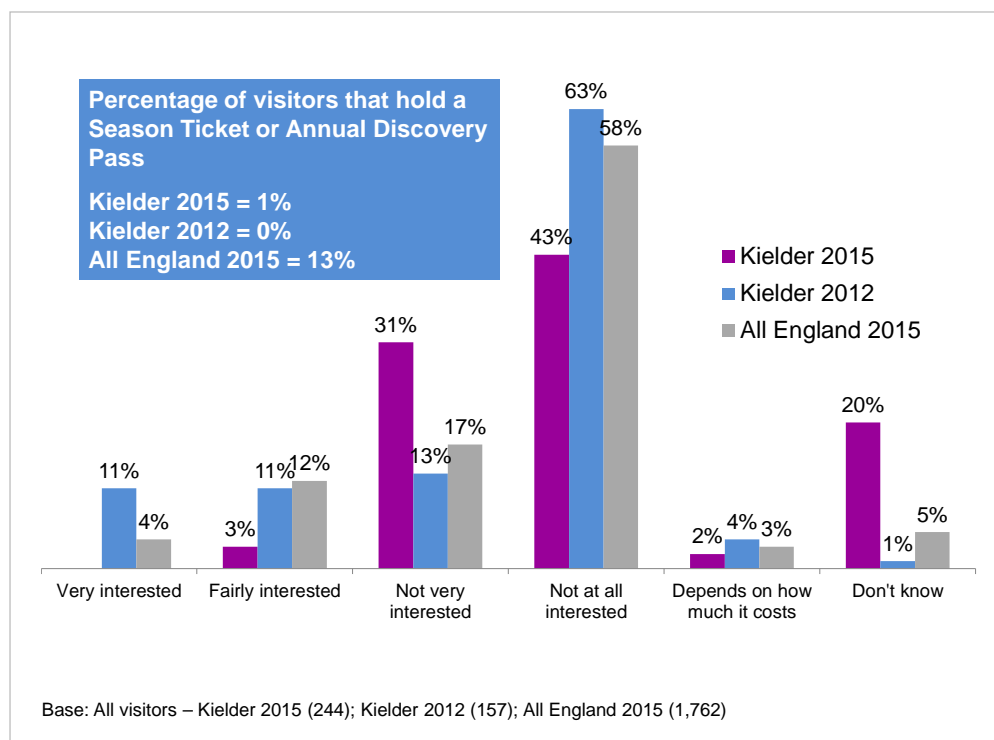
Only 1% of visitors to Kielder held a season ticket or annual Discovery Pass; this was significantly lower than the all England average (13%) but was slightly higher than in 2012 when none of the visitors to Kielder had a Discovery Pass.

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 Kielder on purchasing an Annual Discovery Pass were significantly lower than the all England average and the 2012 research, with only 3% saying they were fairly interested and no one saying they were very interested (16% on average said they were interested across other England sites and 22% in the 2012 survey).

Most of the visitors interviewed were therefore not interested in purchasing an Annual Discovery Pass (74%) 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

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

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

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

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

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

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

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

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

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

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

(7)
1
2
3

**IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW**

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

- English
- Welsh

(8)
1
2

**ASK ALL**

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

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

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

**SHOWCARD A**

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

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

(17)  
1  
2  
3  
4  
5

**SHOWCARD B**

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

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

(18)  
1  
2  
3  
4  
5  
6  
7  
8  
9

**ASK ALL**

**SHOWCARD C**

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

**PROBE** - Any others?

**RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED**

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

**SHOWCARD C AGAIN**

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

**RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED**

**ASK ALL**

**SHOWCARD C AGAIN**

**Q4c** And which of these activities are you (**IF PART OF GROUP:** or other members of your group) **planning** to take part in during your visit here today? **PROBE** - Any others?

**RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED**

		(20-23m)	(28-31m)	(36-39m)
		<b>Q4a</b> Personally taken part in	<b>Q4b</b> Others in group taken part in	<b>Q4c</b> Personally / other <b>PLANNING</b> 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)
	<b>OTHERS</b>			
	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><b>Q7</b> How or where did you find out about this site as a place to visit? <b>CODE ALL MENTIONED</b></p>	<p>(55-58m)</p>
<p>Always known about it / been here before Word of mouth Newspaper Leaflet ----- Tourist Information Centre</p>	<p>1 2 3 4 5</p>
<p>Road signs Just passing / en route Map Smartphone app ----- Facebook</p>	<p>6 7 8 9 A</p>
<p>----- Twitter Forestry Commission website Natural Resources Wales website Google / other search engine Other website (please specify) _____</p>	<p>B C D E X</p>
<p>-----  Other (please specify) _____  Don't know / can't remember</p>	<p>(59-62m)  X  M</p>
<p><b>Q8</b> What do you like most about the site? <b>PROBE</b> Anything else? <b>DO NOT PROMPT – CODE ALL MENTIONED</b></p>	<p>(63-66m)</p>
<p>Peace / tranquillity / relaxation Scenery / views / beautiful Walks / paths / trails ----- Cycle trails / freedom / opportunity to cycle</p>	<p>1 2 3 4</p>
<p>----- Wildlife / bird watching Fresh air / being outside Exercise / keeping fit ----- Activities that are good for the children</p>	<p>5 6 7 8</p>
<p>----- Close to home / convenient Opportunity to spend time with family / friends Safe environment ----- Lots to see and / or do</p>	<p>9 A B C</p>
<p>----- Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after ----- The weather</p>	<p>D E F G</p>
<p>----- Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money -----</p>	<p>H I J K</p>
<p><b>Other (please specify)</b> ----- -----  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

# KIELDER

## ASK ALL

### SHOWCARD G13

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

None of these  
Don't know

M  
N

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

(117-120m)

**PROBE** Anything else?  
**RECORD VERBATIM**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

(121-124m)

Nothing  
Don't know

M  
N

# KIELDER

## ASK ALL

### SHOWCARD G13 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	Art or sculpture in the forest	4	1	2	3	4	5	6	7	(143)
B	Bike wash	7	1	2	3	4	5	6	7	(146)
C	Bus links	9	1	2	3	4	5	6	7	(148)
D	Café / restaurant / catering	A	1	2	3	4	5	6	7	(149)
E	Camping	B	1	2	3	4	5	6	7	(150)
F	Car parking	C	1	2	3	4	5	6	7	(151)
G	Castle	D	1	2	3	4	5	6	7	(152)
H	Cycle hire	E	1	2	3	4	5	6	7	(153)
I	Cycle trails	F	1	2	3	4	5	6	7	(154)
J	Disabled toilets	G	1	2	3	4	5	6	7	(155)
K	Easy / all ability access	H	1	2	3	4	5	6	7	(156)
L	Educational resources	I	1	2	3	4	5	6	7	(157)
M	Events	J	1	2	3	4	5	6	7	(158)
N	Forest drive	K	1	2	3	4	5	6	7	(159)
O	Go Ape!	N	1	2	3	4	5	6	7	(162)
		(129-132m)								
P	Heritage site	2	1	2	3	4	5	6	7	(165)
Q	Horse riding	4	1	2	3	4	5	6	7	(167)
R	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
S	Mountain bike trails	7	1	2	3	4	5	6	7	(170)
T	Orienteering / Geocaching	A	1	2	3	4	5	6	7	(173)
U	Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
V	Play areas and equipment	E	1	2	3	4	5	6	7	(177)
W	Toilets	K	1	2	3	4	5	6	7	(183)
X	Viewpoint	M	1	2	3	4	5	6	7	(185)
Y	Visitor Centre	N	1	2	3	4	5	6	7	(186)
Z	Walking trails	O	1	2	3	4	5	6	7	(187)
		(133-136m)								
AA	Water sports / canoeing / sailing	2								(189)
BB	Wildlife viewing / activities	3	1	2	3	4	5	6	7	(190)
<b>OTHERS (WRITE IN)</b>										
			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



<b>Q20a</b> 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**

<b>Q20b</b> Currently you can get season tickets or Discovery Passes for individual Forestry Commission sites in a local area. How interested would you be in having a pass that allowed free parking and discounts at all Forestry Commission sites nationally? This would probably cost around £70 per year? <b>SINGLE CODE</b>	(331)
Very interested	1
Fairly interested	2
Not very interested	3
Not at all interested	4
Depends on how much it costs – <b>DO NOT PROMPT WITH THIS CODE</b>	5
Don't know	6

**ASK ALL**

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

**Q21 INTERVIEWER RECORD GENDER**

(415)

Male

1

Female

2

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

(416)

16-24 years

1

25-34 years

2

35-44 years

3

45-54 years

4

55-64 years

5

65+ years

6

Refused

7

**SHOWCARD M**

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

(417)

**SINGLE CODE**

Employee in full time job (30 hours plus a week)

1

Employee in part time job (under 30 hours per week)

2

Self-employed full or part time

3

On a government supported training programme

4

Full time education at school, college or university

5

Unemployed and available for work

6

Permanently sick / disabled

7

Wholly retired from work

8

Looking after the home

9

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

Refused

Z

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

(418)

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

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

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

AB

1

C1

2

C2

3

DE

4

Refused

5

<b>Q25</b>	Do you have any children aged 15 or under living in your household?	(420)
	Yes	1
	No	2
	Refused	3
<b>Q26</b>	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? <b>INCLUDES PROBLEMS RELATED TO OLD AGE</b>	(421)
	Yes – limited a lot	1
	Yes – limited a little	2
	No	3
	Refused	4
<b>SHOWCARD N</b>		
<b>Q27</b>	Which of these best describes your ethnic origin? <b>SINGLE CODE</b>	(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:					
<b>THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.</b>					
<i>Interviewer Declaration:</i> I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:					
Signature				Date of interview:	
				(435)(436)(437)(438)	
WRITE IN YOUR INTERVIEWER NUMBER →				(439)	(440)
				(441)	(442)
<b>B01326-3</b>	<b>F.O.U (BACK CHECKS)</b>		<b>Accompanied</b>	<b>Yes 1</b>	<b>Supervisor signature</b>
				<b>No 2</b>	

## Appendix II

### Explanation of social class categories

---

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

#### **AB**

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

#### **C1**

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

#### **C2**

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

#### **DE**

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

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