

FOREST VISITOR SURVEYS 2007

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1. INTRODUCTION

Between 1995 and 2001 the Forestry Commission co-ordinated a National Programme of visitor surveys across Great Britain, focussing on larger sites, often with visitor centres. In 2002, this programme ceased to operate. A new visitor monitoring system was piloted in 2002. This was aimed primarily at providing a more accurate estimate of the number of visits to woodland managed by the Forestry Commission, whilst continuing to gather information regarding the profile of visitors. The 'All Forests' visitor monitoring surveys commenced in Wales and Scotland in 2004. Results from the Welsh survey were published in 2005 and a final report for the 3-year Scotland All Forests Survey were published in April 2008 (individual reports for the first, second and final year of Scotland's All Forest Survey are also available). New methods for measuring the quality of visitor experience were also developed. Quality of experience surveys began in England in 2003 and in Wales in 2006.

Section 2 of this report presents results from local visitor surveys that are still carried out when required by forest district management. These types of surveys address local management issues, with questions designed to obtain information that varies from site to site. Some surveys are targeted at specific events or projects, for example one survey was part of an evaluation of the Between Two Worlds event held in Glenmore Forest Park, and another report evaluates Phase 2 of the 7stanes Mountain Bike Trails project in the Scottish Borders and Galloway. Other surveys of the visitor experience of events and within visitor centres are also included. Results should be interpreted with caution when sample sizes are small.

Section 3 gives details of other surveys carried out in 2007 that provide information about forest visitors. These include the 'All Forests' survey in Scotland and the 'Quality of Experience' surveys at a range of sites in England and Wales. The results of the Scottish Recreation Survey for 2006 and 2007 are due to be published during summer/autumn 2008 and will be added to this series of visitor summary reports at a later date.

For more information about this or other visitor survey work please contact Forestry Commission Statistics at the address below.

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2. LOCAL VISITOR SURVEYS

2.1. SCOTLAND

EVENTS EVALUATION

General Information

This Events survey took place between February – October 2007 in five Forest Districts; Aberdeenshire, Cowal & Trossachs, Fort Augustus, Galloway and Lochaber. A range of events took place, including 10,000 steps, dark skies, bushcraft, bug hunt, monster machines and various walks.

A total of 190 survey questionnaires were completed. The summary data presented below collates the results from the five forest districts together.

Summary

Visitors were satisfied with the service provided by staff (100%). The majority of visitors (99%) who had attended these events said they would recommend the FCS event to family and friends. Over four-fifths of visitors (81%) will be happy to receive information about the event in the future.

Results

	Total
Number of completed questionnaires ¹	190
Visit details	
% who had attended one of our events before	33
% who attend an event once a year or more	17
% who were aware of the Event's guide	63
% who had visited the FC website	32
% who had seen the event advertised in a Newspaper	34
% who would recommend the FCS event to family and friends	99
Ratings	
% satisfied with quality of information	100
% satisfied with overall quality of info	100
% satisfied with the service provided by our staff	100
Future	
% who would like to receive information in the future	81
% of preferred method to receive future information (Post / E-mail)	48/52

Timing of survey: February – October 2007
 Type of survey: Self-completion questionnaire
 Data Tables: Information available on request

¹ Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they give a rating of Excellent, Good, or OK. Results are based only on those who responded.

VISITOR CENTRE FEEDBACK

Two ratings surveys were carried out in Galloway Forest Park. Responses from 117 visitors were obtained from the first survey conducted at three visitor centres; Clatteringshaws, Glentroot and Kirroughtree. The ratings offered in this survey were Very good, Good, Fair, Poor and Very poor. The second survey received 132 completed questionnaires and also included Queen Elizabeth Forest Park, but used the ratings Very good, Good, Poor and Very poor. The summary data presented below collates the results from all visitor centres.

Summary

All visitors (100%) in the first questionnaire who rated the picnic facilities thought they were Very good, Good or Fair. Go Ape had a 100% satisfaction rating of Very good or good from the visitors to QEFP. The visitors to Kirroughtree suggested that the café/shop should be open throughout the winter months or open longer hours. The comments received suggest that the staff were generally thought to be very friendly and helpful.

Results

	Total
Number of completed questionnaires ¹	117
Ratings	
% satisfied with the quality of service	99
% satisfied with the quality of food	99
% satisfied with food prices	96
% satisfied with the toilet facilities	94
% satisfied with parking facilities	97
% satisfied with the picnic facilities	100
% satisfied with opening hours	95
% satisfied with quality of goods in the shop	98
% satisfied with the walking facilities	98
Number of completed questionnaires ²	132
Ratings	
% satisfied with the parking facilities	97
% satisfied with the signage	92
% satisfied with the picnic area	96
% satisfied with the children's play area	97
% satisfied with the toilet facilities	87
% satisfied with the baby changing facilities	86
% satisfied with the opening hours	99
%satisfied with quality of food	98
% satisfied with the quality of service	97
% satisfied with the value for money of food	94
% satisfied with the range of good in the shop	96
% satisfied with the cycling facilities	93
% satisfied with the walking facilities	95
% satisfied with the visitor information	95
% satisfied with the go ape facilities (QEFP only)	100
% satisfied with the overall quality of visit	98

Timing of survey: June – November 2007
 Type of survey: Self-completion questionnaires
 Data Tables: Information available on request

¹ Satisfaction rating, as a proportion of those who rated the facility. Visitors are classed as satisfied if they give a rating of Very good, Good or Fair.

² Satisfaction rating expressed as a proportion of those who rated the facility. Visitors are classed as satisfied if they give a rating of Very good or Good.

CHRISTMAS SURVEY

General Information

This Christmas survey took place at two sales centres in Aberdeenshire. At the Inverness site 68 forms were completed and at Tyrebagger 460 responses were received. The summary data below presents the results from both sales centres.

Summary

Almost three-fifths of respondents had heard about the Christmas Tree Centre via word of mouth (57%) whereas, only 7% had seen it in the local newspaper and 6% saw it on the Forestry Commission website. Nearly three in ten of the visitors came because of the quality of the tree (28%), just over a quarter came to buy a sustainably grown tree (26%) while 21% came for the atmosphere and 15% thought that buying a tree from the sales centre was value for money. Visitors to both centres thought that staff were very helpful and friendly but some would like Christmas music playing in the background at Tyrebagger!

Results

	Total
Number of completed questionnaires	528
Visit details	
% of visitors who heard about the Christmas tree centres via word of mouth	57
% of visitors who heard about the Christmas tree centre from road signs	21
% of visitors who heard about the Christmas tree centre in the local newspaper	7
% of visitors who heard about the Christmas tree centre from the FC website	6
% of visitors who came to buy a tree because of the quality of tree	28
% of visitors who came to buy a sustainably grown tree	26
% of visitors who came because of the atmosphere of the forest/sales centre	21
% of visitors who came to buy a tree because of the value for money	15
% of visitors who had visited sales centres before	88

Timing of survey: Christmas 2007
 Type of survey: Self-completion questionnaires
 Data Tables: Information available on request

7 STANES PHASE 2 EVALUATION

General Information

The 7stanes are seven mountain biking centres spanning the south of Scotland, from the heart of the Scottish Borders to Dumfries and Galloway. The seven sites are: Glentool, Kirroughtree, Dalbeattie, Mabie, Ae, Glentress and Innerleithen (Tweed Valley) and Newcastleton. The full findings of the second phase of the project are available via the web link at the bottom of this page. A range of results from the visitor survey are presented below.

Summary

Males in full time employment aged 18 - 45 dominate the visitor profile. Visitors participated in a number of other activities such as walking, running, rock climbing, snowboarding, skiing and fishing. The most common way of finding out about the trails was by word of mouth (48%) with the next most common being the 7stanes website (34%). Some of the common suggested improvements were ongoing maintenance (33% of visitors) and requests for more toilets and cafes.

Results

	Total
Number of completed questionnaires	235
Group composition	
% of males visitors	84
% of female visitors	16
% of adults (ages 46 – 60)	9
% of adults (aged 31 - 45)	54
% of adults (aged 18 – 30)	34
% of visitors in full-time employment	88
% of visitors in full-time education	8
% of visitors in ABC1 social class	80
Trip Details	
% whose main type of transport used was car	93
Visit Details	
% who first became aware of the Mountain Bike Trails through word of mouth / 7 Stanes website	48/34
% of visitors staying in a Hotel	20
% of visitors spending one day on trails	69
% of visitors spending two days on trails	16
% of visitors from outwith South of Scotland	80
% of visitors only reason for visit to South of Scotland was the MBT ¹	78
Overall average number of days on the trails	1.5
Ratings	
% of visitors who were satisfied with quality of mountain bike trail ²	99

Timing of survey: September – October 2007

Type of survey: Face to face interviews

Publication: 7Stanes Phase 2 Evaluation report for FC Scotland, Oct-2007

¹ Excludes residents of South Scotland

² Visitors are classed as satisfied if they give a rating of Very good and Good.

³ [http://www.7stanes.gov.uk/pdf/7stanesphase2finalreport.pdf/\\$file/7stanesphase2finalreport.pdf](http://www.7stanes.gov.uk/pdf/7stanesphase2finalreport.pdf/$file/7stanesphase2finalreport.pdf)

BETWEEN TWO WORLDS EVALUATION

General Information

This event was held in Glenmore Forest Park in the heart of the Cairngorms National Park between 2nd – 18th November 2007. The Between the Two Worlds experience was a 2-mile journey along the Caledonian forest, along gravel tracks and boardwalks, where light and music was used to reveal the mystery and beauty of the historic Glenmore Forest bringing it's ancient legends to life.

Summary

All aspects of the event were rated highly with staff and the event organisation rated the highest at 98% and 93%. The majority of visitors rated their overall experience of the event as either very good (61%) or good (28%). One of the suggestions for improvement was for more or better music.

A total of 13 businesses were contacted of which 11 completed the full questionnaire. Six of the businesses had heard of the event through word of mouth, two through local information/living locally and the other three became aware from the Visit Aviemore website, a leaflet or a newspaper. Two of the businesses (both hotels) offered additional services.

Results

	Total
Number of completed questionnaires through e-mail and post	210
Group composition	
% of adults (aged 46 - 60)	35
% of adults (aged 31 – 45)	38
% of visitors in full-time employment	55
% of visitors in part-time employment	15
% of retired visitors	15
% of visitors with children	36
Average size of group	3.5
Visit Details	
% of visitors staying in a Hotel	22
% of visitors staying in second home	20
% of visitors staying in guest house or b&b	18
% of visitors staying in caravan or camping site	10
% of visitors who originated from outside the local area	81
Ratings¹	
% of visitors who were satisfied with the event organisation	96
% of visitors who were satisfied with the overall experience	89

Timing of survey: 2nd – 18th November 2007
 Type of survey: E-mail and mail surveys
 Publication: Between Two Worlds Evaluation Report2

¹ Visitors are classed as satisfied if they give a rating of Very good and Good

² [http://www.forestry.gov.uk/pdf/BTWReport.pdf/\\$FILE/BTWReport.pdf](http://www.forestry.gov.uk/pdf/BTWReport.pdf/$FILE/BTWReport.pdf)

2.2 ENGLAND

WESTONBIRT, INTERPRETATION SURVEY 2007

General Information

This was a survey of 100 visitors carried out over 5 days in August and two days in June and July. It aimed to examine which current forms of interpretation provision visitors actually used and favoured. It also investigated what visitors thought of the provision, why some visitors don't engage with the interpretation, whether the provision actually delivers what it is trying to do in terms of providing visitors with choice, way marking, enjoyment and greater understanding/empathy with the site.

Summary

52 % of those surveyed were Friends compared to 48 % who were non-members. The interviewer made assessments of the ages of group members on a present/absent basis. The findings were that, of the 100 groups, 38 groups contained visitors aged 60 and over, 74 groups contained visitors aged 25 to 59 years old and 86 groups contained visitors aged under 5 to 24 years old. Ten groups contained dogs and 34 groups pushchairs or wheelchairs. A third of respondents (32%) said that their main reason for visiting was to walk, while under a fifth (16%) had come for the tree collection or a seasonal aspect.

The greatest factor motivating non-members to use interpretation was to find their way around (77%). Fewer wanted to learn something (18%) or find out what their choices were (9%). In contrast, the main motivating factor for those members using the interpretation was to learn something (63%). 38% of members who used interpretation, used it for directional purposes and 13% to find out what their choices were. All members using the interpretation found it easy to access, and while most non-members also found this to be the case, 27% had difficulties. Members were more likely than the non-members to cite the fact that they had seen interpretation before as the reason for not using it during their visit (40% of respondents vs. 13%).

This report concludes that interpretation themes need to be re-evaluated and that while the Forestry Commission heritage story is important it is not the topic that our visitors find most interesting. For both members and non-members "trees" were the more important topic and so focus will now be re-directed onto a more tree/conservation message.

Timing of survey: 29th June, 31st July & 1 week in August 2007
Type of survey: Interviewer-led
Publication: Westonbirt Interpretation Survey 2007

2.3 WALES

AFAN FOREST PARK, COED Y CYMOEDD

General Information

Between 18th August and September 8th 2007, 419 face to face questionnaires were carried out at different times of the day between 11am and 6pm at Afan Forest Park Visitor Centre (41% of interviews), Glyncorrwg Mountain Bike Centre (42%) and Rhyslyn Car Park (17%). These interviews were conducted as visitors exited the park. This is the sixth annual visitor survey of its kind.

Summary

As in previous years of the survey, Afan Forest Park continues to appeal more to male visitors than female with male respondents representing 75% of the survey sample.

The proportion of visitors that are local residents have increased since last year with those living within 30 minutes of the park accounting for 43% of interviews.

Mountain Biking continues to prove the most popular reason to visit the park with 4 out of 10 respondents stating this sport, although this has decreased from 57% in 2006. The proportion visiting the park for walking and a general day out have however increased from 2006 with 20% and 11% visiting for these reasons respectively. 2007 also saw an increase in the proportion of respondents visiting other attractions within the park. 16% visited the South Wales Miners Museum while the proportion who had been on the Children's Wildlife trail have doubled.

The average daily spend in the park has decreased by £4 in 2006 to £47 in 2007.

Over half of visitors (51%) to the park are aware of the Afan Forest Park website. This remains the main source of information for visitors with a quarter of respondents using the internet to access information prior to their visit.

Timing of survey:	August 19 th – September 9 th 2007
Type of survey:	Face to Face Interviews
Publication:	Research Document

3. OTHER SURVEYS

3.1. QUALITY OF EXPERIENCE SURVEYS

FINESHADE WOOD

General Information

At Fineshade Wood between 28th July and 28th October a total of 296 visitors were interviewed. Of the 256 self-completion survey forms given to less frequent visitors, 70 were returned completed (27%).

Summary

The majority of visitors to Fineshade Wood were in the Empty Nester lifecycle group (64%). Nearly three in five visitors (56%) were on a short trip of an hour or less from home and almost three-fifths (57%) had visited Fineshade previously. Visitors were asked what they most liked about Fineshade Wood; 28% liked the peace/tranquility and 18% the nice walks. Those visitors who used the café or restaurant gave it a reasonably high average satisfaction score of 3.21. The daily average spend per person (of those who spent anything) was £16.

Results

	Total
Number of interviews	296
Visitor Profile	
% of senior citizens (aged 65+)	23
% of adults aged 45-64	50
% of adults aged 25-44	26
% of young adults (aged 16-24)	1
% of who were in the Empty Nester lifecycle group	64
% of visitors in social grades ABC1	70
Trip Details	
% who were on a short day trip from home (less than 1 hour)	56
% who were on a longer day trip from home (3 hours or more)	14
% who were on an overnight stay away from home	8
Visit Details	
% who had visited the forest before	57
% who visited 1 to 3 times a month	13
% of visitors who took part in walking with/without a dog	23 / 59
Average length of stay on site	1 hrs 34 m
Most important aspects in decision to visit²	
Being able to enjoy scenery and views	4.12
Being able to enjoy the wildlife	4.05
Aspects of visit given top satisfaction rating 1, 3³	
Enough Car parking	4.30
Value for money of your whole trip or day out	4.01

Timing of survey: 28th July - 28th October 2007

Type of survey: On-site interview, self-completion questionnaire

Publication: 'Monitoring the quality of experience in forests – Fineshade Wood'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important

³ Ratings based a scale from 1 to 5; e.g. 5 excellent, 4 very good, 3 good, 2 fair, 1 poor

WHINLATTER FOREST PARK

General Information

This survey took place at Whinlatter Forest Park. A total of 348 visitors were interviewed and 78 self-completion questionnaires were returned (25% of the 307 distributed).

Summary

The largest proportion of visitors to the Whinlatter Forest Park were in the Empty Nesters (no children) lifecycle group (53%). A higher proportion of males (46%) took part in hillwalking/rambling than amongst female visitors (34%).

The most popular aspects of visiting the forest, were the scenery and beautiful views and peace, quiet and tranquillity (31%). The daily average spend per person of those who spent anything was £46.

Results

	Total
Number of interviews	348
Visitor Profile	
% of senior citizens (aged 65+)	18
% of adults aged 45-64	44
% of adults aged 25-44	38
% of young adults (aged 16-24)	1
% who were in the Empty Nester lifecycle group	53
% of visitors in social grades ABC1	71
Trip Details	
% who were from Carlisle / Newcastle upon Tyne	27 / 5
% who were on a short day trip from home (less than 1 hours)	18
% who were on a longer day trip from home (3 hours or more)	9
% who were on an overnight stay away from home	56
Visit Details	
% of repeat visitors to same forest	69
% who visited 1 to 3 times a month	10
% of visitors who took part in walking with/without a dog	22 / 31
Average length of stay	2 hrs 11 m
Most important aspects in decision to visit ²	
Clean toilets	4.06
Feeling happy to leave car in car park	3.88
Enough car parking	3.83
Aspects of visit given top satisfaction rating ^{1, 3}	
Being able to enjoy scenery and views	4.33
Value for money of your whole trip or day out	4.16
Clean toilets	4.14

Timing of survey: 28th July - 28th October 2007

Type of survey: On-site interview, self-completion questionnaire

Publication: 'Monitoring the quality of experience in forests – Whinlatter Forest Park'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

³ Ratings based a scale from 1 to 5; e.g. 5 excellent, 4 very good, 3 good, 2 fair, 1 poor

ROSLISTON FOREST

General Information

Between 28th July and 28th October at Rosliston Forest a total of 301 people were interviewed and 28 self-completion questionnaires were returned (15% of the 190 distributed).

Summary

The majority of respondents were in the Family Lifecycle group (55%) while 5% of respondents were in the young independent lifecycle (aged under 35 and no children in the household). Nearly half of the visitors were aged 45 or over (48%).

Visitors particularly appreciated the activities for children, the scenery and beautiful views and the peace and tranquillity of the forest. The overall average daily spend per person (of those who spent anything) was £10.

Results

	Total
Number of interviews	301
Visitor Profile	
% of senior citizens (aged 65+)	15
% of adults aged 45-64	33
% of adults aged 25-44	50
% of young adults (aged 16-24)	3
% who were in the Family lifecycle group	55
% of visitors in social grades ABC1	61
Trip Details	
% who were from Derby / Birmingham	64 / 15
% who were on a short day trip from home (less than 1 hours)	71
% who were on a longer day trip from home (3 hours or more)	8
% who were on an overnight stay away from home	3
Visit Details	
% of repeat visitors to same forest	87
% who visited 1 to 3 times a month	25
% of visitors who took part in walking with/without a dog	22 / 66
Average length of stay	2 hrs 11 m
Most important aspects in decision to visit ²	
Clean toilets	4.23
Feeling happy to leave car in car park	4.08
Feeling safe in the forest	3.96
Aspects of visit given top satisfaction rating ^{1, 3}	
Being able to enjoy scenery and views	4.14
Clear signposting on footpaths	4.07
Value for money of your whole trip or day out	4.03

Timing of survey: 28th July - 28th October 2007

Type of survey: On-site interview, self-completion questionnaire

Publication: 'Monitoring the quality of experience in forests – Rosliston Forest'

¹ Satisfaction ratings based only on those who responded.

² Ratings based on a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

³ Ratings based on a scale from 1 to 5; e.g. 5 excellent, 4 very good, 3 good, 2 fair, 1 poor.

COED Y BRENIN

General Information

This survey took place at Coed y Brenin Forest between 28th July and 28th October. A total of 372 visitors were interviewed and 47 self-completion questionnaires were returned (14% of the 331 distributed).

Summary

Almost two-fifths 38% of visitors to Coed y Brenin Forest were in the Family lifecycle group. Almost half of the visitors 48% enjoyed some kind of walking, either with or without a dog, hill walking or rambling. Cycling was the most popular activity with over half of the visitors 52% taking part in one or more type of cycling.

The most popular aspects of visiting the forest were the lovely scenery and views (20%) and the bike trails and freedom to roam (20%). Daily average spend per person (of those who spent anything) was £55.

Results

	Total
Number of interviews	372
Visitor Profile	
% of senior citizens (aged 65+)	10
% of adults aged 45-64	27
% of adults aged 25-44	56
% of young adults (aged 16-24)	7
% who were in the Family lifecycle group	38
% of visitors in social grades ABC1	77
Trip Details	
% who were from England / Wales	54 / 42
% who were on a short day trip from home (less than 1 hours)	16
% who were on a longer day trip from home (3 hours or more)	5
% who were on an overnight stay away from home	60
Visit Details	
% of repeat visitors to same forest	46
% who visited 1 to 3 times a month	11
% of visitors who took part in walking with/without a dog	12 / 31
Average length of stay	3 hrs 03 m
Most important aspects in decision to visit ²	
Feeling happy to leave car in car park	4.34
Clean toilets	4.21
Enough car parking	4.12
Aspects of visit given top satisfaction rating ^{1, 3}	
Being able to enjoy scenery and views	4.31
Being able to get fit and healthy	4.25
Value for money of your whole trip or day out	4.22

Timing of survey: 28th July - 28th October 2007

Type of survey: On-site interview, self-completion questionnaire

Publication: 'Monitoring the quality of experience in forests – Coed y Brenin Forest'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

³ Ratings based on a scale from 1 to 5; e.g. 5 excellent, 4 very good, 3 good, 2 fair, 1 poor.

NORTH AND MID WALES - BALA AND LLANIDDOES AREA

General Information

This survey took place in the residential areas around Bala and Llanidloes during November and December 2007 and gathered details of the people living in the vicinity of the neighbouring woodlands. A total of 310 people were interviewed in their homes, with 152 interviews in Bala and 158 interviews in Coed Sarnau. The results presented below are of all respondents, however the survey report has a more comprehensive breakdown of both areas.

Summary

During the previous year the average number of visits per visitor who had accessed local FC forests was four, and the average length of time spent during visits was 1 hour and 25 minutes. Three quarters (75%) of respondents specified that the main benefits of having woodland in their local area was because it was good for wildlife, while over half (56%) stated that it created a natural environment for future generations to enjoy.

Results

	Total
Number of interviews	310
Visitor Profile	
% of senior citizens (aged 65+)	31
% of adults aged 45-64	34
% of adults aged 25-44	27
% of young adults (aged 16-24)	7
% who were in the Family lifecycle group	30
% of visitors in social grades ABC1	37
% of Bala residents who were aware of/or who had visited Bala	99 / 89
% of Coed Sarnau residents who were aware of/or who had visited Coed Sarnau	31 / 4
Participation in outdoor recreation activities	
% of respondents who took part in walking less than 2 miles	61
% of respondents who took part in dog walking	37
% of respondents who walked more than 2 miles	33
% of respondents who participated in cycling/mountainbiking	20
Most important aspects in decision to visit FCW sites ^{1,2}	
Being able to enjoy scenery and views	3.97
Being able to enjoy the wildlife	3.84
Feeling safe in the wood	3.76
Aspects of forest visit given top satisfaction rating ^{1,3}	
Being able to enjoy scenery and views	3.81
Being able to enjoy the wildlife	3.81
Value for money of your whole trip or day out	3.76

Timing of survey: November and December 2007

Type of survey: Face to Face interviews

Publication: 'Monitoring the quality of experience in community forest– North and Mid Wales'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

³ Ratings based on a scale from 1 to 5; e.g. 5 excellent, 4 very good, 3 good, 2 fair, 1 poor.

SOUTH WEST ENGLAND - LEIGH WOODS AND BLAISE CASTLE

General Information

This survey took place in the residential areas around Leigh Woods and Blaise Castle during November and December 2007, gathering information from the people living in the vicinity of the neighbouring woodlands. A total of 293 people were interviewed in their homes, with 136 interviews in Leigh Woods and 157 interviews in Blaise Castle. The results presented below are of all respondents, however the survey report has a more comprehensive breakdown of both areas.

Summary

The results showed that 42% of visitors were in the Empty Nesters lifecycle group and that the split of males and females was fairly even. The average time spent by visitors to the two sites was 1 hour and 18 minutes and the average number of visits (of those who had made any visits) per visitor per year was 33. The majority (88%) of respondents had in the last year participated in an active outdoor pursuit such as walking or cycling while 66% had participated in a passive outdoor pursuit such as visiting parks and gardens.

Results

	Total
Number of interviews	293
Visitor Profile	
% of senior citizens (aged 65+)	23
% of adults aged 45-64	35
% of adults aged 25-44	31
% of young adults (aged 16-24)	11
% who were in the Family lifecycle group	24
% of visitors in social grades ABC1	67
Participation in outdoor recreation activities	
% of respondents who took part in walking less than 2 miles	61
% of respondents who took part in dog walking	29
% of respondents who walked more than 2 miles	44
% of respondents who participated in cycling/mountainbiking	30
Most important aspects in decision to visit Leigh Woods/Blaise Castle^{1,2}	
Being able to enjoy scenery and views	4.21 / 4.00
Convenient/close to where I live	3.99 / 4.15
Solitude, peace and quiet	3.98 / 3.62
Aspects of visit given top satisfaction rating Leigh Woods/Blaise Castle^{1,3}	
Convenient/close to where I live	4.37 / 4.48
Value for money of your whole trip or day out	4.09 / 4.27
Being able to enjoy scenery and views	4.05 / 3.98

Timing of survey: November and December 2007

Type of survey: Face to Face Interviews

Publication: 'Monitoring the quality of experience in community forests – South West England'

¹ Satisfaction ratings based only on those who responded.

² Ratings based a scale from 1 to 5; e.g. 5 extremely important, 4 very important, 3 fairly important, 2 fairly unimportant, 1 not at all important.

³ Ratings based on a scale from 1 to 5; e.g. 5 excellent, 4 very good, 3 good, 2 fair, 1 poor.

3.2. SCOTLAND 'ALL FORESTS' VISITOR SURVEY (YEAR 3)

General Information

This survey was commissioned by FC Scotland to monitor the number of visits to their woodlands and to obtain visitor profiles. The survey took place over a three-year period with five forest districts being surveyed each year. A summary of the results of the third year of the survey is presented below and on the following pages. Monitoring took place at a sample of FCS woodlands (approximately 20% of forests in each forest district). TNS Travel & Tourism carried out fieldwork between July 2006 and June 2007. A total of 955 face to face interviews took place.

Summary

An estimated 2.6 million visits were made to the five forest districts surveyed in 2006/7. The average group size was 2.2 people with 27% of visitors aged 45 - 59 years old and 40% of visitors were on their own. Under a fifth (18%) of visitors were on overnight stays in the area spending on average 7.6 nights in Scotland. 57% of visitors travelled under 6 miles to the site while 48% were dog walkers, and the average duration of visit was 1 hour and 17 minutes.

Results

	Total
Number of interviews	955
Estimated number of visits (million)	2.6
Estimated annual spending (£ million)	11.3
Visitor profile	
Average group size	2.2
% of male	53
% of senior citizens (aged 60+)	16
% of adults 45-59	27
% of adults aged 35-44	20
% of groups with at least 1 person with a disability	4
Trip Details	
% on a local day trip who travelled within 6 miles to the site	49
% who travelled to the site by car/van	80
% on an overnight stay in area	18
Average length of stay in Scotland for overnight trips (nights)	7.6
Visit Details	
% of repeat visitors to same forest	83
% who visit at least once a day	17
Average length of visit to forest	1 hr 17m
% whose main activity was dog walking / other walking	48 / 29
% whose main activity was Cycling / MTB on waymarked tracks	11
Average expenditure per visit (£)	18

Timing of survey: July 2006 - June 2007

Type of survey: Face to face interviews & visitor counting

Publications: 'All Forests Visitor Monitoring: Survey of visitors to FC Scotland Woodlands 2006/7'

Topics covered: Standard demographics and details of visit including length of stay, activities, group size and expenditure.

AE FOREST DISTRICT

General Information

Ae Forest District lies mainly within the Dumfries & Galloway Region in south west Scotland. The District manages an area of 31,500 hectares of land, and manages 26,800 hectares of commercial woodland.

The Forest District covers a geographic area of over 1400 square miles of upland hills, moorland and grassland within a landscape containing extensive conifer forests.

Summary

88% of visitors travelled to the site by car or van. Over four-fifths of visitors were repeat visitors (84%). Over a fifth of visitors (22%) stated that the only reason for visiting the area was to visit the forest.

Results

	Total
Estimated number of visits (thousands)	413
Number of interviews	189
Visitor profile	
% of male visitors	56
% of senior citizens (aged 60+)	19
% of adults aged 25-59	61
% of young adults (aged 16-24)	5
% of children (aged < 16)	15
% from Scotland	83
% from England	17
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	45
% on an overnight stay in area	20
% who travelled to the site by car or van	88
% who walked all the way	10
Visit Details	
% of repeat visitors	84
% who visit at least once a day	20
Average length of stay at site	1 hr 41m
% whose main activity was dog walking / other walking	49 / 30
% whose main activity was Cycling / MTB on waymarked tracks	13
Value of forest	
% whose only reason for visiting area was the forest	22
Average expenditure per visit (£)	19

COWAL & TROSSACHS FOREST DISTRICT

General Information

The Cowal and Trossachs Forest District covers Cowal, Loch Lomond, Loch Ard Forest, Achray Forest, Loch Katrine and Strathyre Forest. The district manages over 66,000 hectares of which over 52,000 hectares are in the National Park and 36,000 are forested. The forests are currently mainly coniferous, with 14% of the forest being broad-leaved woodland. However over the next 50 to 100 years there will be a dramatic increase in the proportion of native woodland.

The district has 19 Sites of Special Scientific Interest, over 366 archaeological sites and is home to a wide range of species from Red Squirrel, Pine Martin, Ospreys, Golden Eagles, Red Kites and Barn Owls.

Summary

Almost three-quarters (72%) of visitors had been to the site they were interviewed at before with 12% visiting every day. 74% of visitors to the forest used car/van as their chosen mode of transport.

Results

	Total
Estimated number of visits (thousands)	471
Number of interviews	285
Visitor profile	
% of male visitors	52
% of senior citizens (aged 60+)	19
% of adults aged 25-59	57
% of young adults (aged 16-24)	7
% of children (aged < 16)	17
% from Scotland	80
% from England	15
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	28
% on an overnight stay in area	34
% who travelled to the site by car or van	74
% who walked all the way	20
Visit Details	
% of repeat visitors	72
% who visit at least once a day	12
Average length of stay at site	1hr 49m
% whose main activity was dog walking / other walking	28 / 55
% whose main activity was Cycling / MTB on waymarked tracks	3
Value of forest	
% whose only reason for visiting area was the forest	15
Average expenditure per visit (£)	28

FORT AUGUSTUS FOREST DISTRICT

General Information

Fort Augustus Forest District is situated within the Highland Council local authority area. The District takes in the northern half of the Great Glen, Glen Urquhart, Glen Affric, Glen Moriston and across into the whole of Skye and Lochalsh. The district comprises almost 60,000 hectares of land, with around 35,000 hectares of woodland.

A quarter of all woodlands are semi-natural, with the other 75% being more conventional plantation forest area, though many of these are native species.

Summary

Almost half of visitors travelled less than 6 miles to the site (46%) and two-thirds came by car / van (66%). Of the 5 districts surveyed in 2006/07 Fort Augustus had the highest proportion of visitors on overnight trips 37% and also had the highest daily spend (£35) of those visitors who spent anything.

Results

	Total
Estimated number of visits (thousands)	268
Number of interviews	79
Visitor profile	
% of male visitors	51
% of senior citizens (aged 60+)	21
% of adults aged 25-59	52
% of young adults (aged 16-24)	13
% of children (aged < 16)	14
% from Scotland	74
% from England	14
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	46
% on an overnight stay in area	37
% who travelled to the site by car / van	66
% who walked all the way	29
Visit Details	
% of repeat visitors	75
% who visit at least once a day	13
Average length of stay at site	1 hr 12m
% whose main activity was dog walking / other walking	52 / 29
% whose main activity was Cycling / MTB on waymarked tracks	4
Value of forest	
% whose only reason for visiting area was the forest	6
Average expenditure per visit (£)	35

INVERNESS FOREST DISTRICT

General Information

Inverness Forest District is located within the Highland Council area. It comprises an area from Laggan in the south to Cromarty in the east, and to Ullapool in the north west. The district comprises an area of some 34,360 hectares of land, hill and loch. It includes a significant proportion of open hill land at Glenmore Forest Park and adjoining Ben Wyvis, with the woodland area totalling 28,600 hectares.

Summary

Just under three-fifths of visitors were on a local day trip (55%) with 70% making the journey by car/van. Out of all the 5 districts covered in 2006/07, visitors to forests in this district had the shortest average stay of 59 minutes.

Results

	Total
Estimated number of visits (thousands)	639
Number of interviews	208
Visitor profile	
% of male visitors	57
% of senior citizens (aged 60+)	15
% of adults aged 25-59	65
% of young adults (aged 16-24)	8
% of children (aged < 16)	12
% from Scotland	87
% from England	6
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	55
% on an overnight stay in area	17
% who travelled to the site by car / van	70
% who walked all the way	25
Visit Details	
% of repeated visitors	83
% who visit at least once a day	25
Average length of stay at site	59 m
% whose main activity was dog walking / other walking	50 / 13
% whose main activity was Cycling / MTB on waymarked tracks	24
Value of forest	
% whose only reason for visiting area was the forest	26
Average expenditure per visit (£)	21

KINCARDINE FOREST DISTRICT

General Information

Since the beginning of this survey in 2004 Kincardine and Buchan have been combined to form the new Aberdeenshire Forest District.

Aberdeenshire Forest District is made up of around 150 separate woodland blocks, ranging in size from 5ha to 5,800ha. Trees cover 82% of the land managed by the district, and the majority of the rest is open space, including large hilltops as well as planned open ground left within plantations. Of the woodland cover, 96% is conifer and 4% broadleaf. The dominant species planted is Sitka Spruce covering 13,608ha, or 43% of the area. Sitka spruce grows well in the conditions, (soil and climate) prevalent in the district, making it suitable for commercial production of timber.

Summary

57% of visitors to this district were in the forest walking their dog, and the average amount of time spend in the forest was 1 hour. The vast majority of visitors used car/van to travel to the forest (90%), with almost three-fifths of visitors travelling less than 6 miles to the site (59%). Out of the five districts surveyed in 2006/07, this district also had the lowest daily spend of £7 (of those visitors who spent anything).

Results

	Total
Estimated number of visits (thousands)	789
Number of interviews	194
Visitor profile	
% of male visitors	51
% of senior citizens (aged 60+)	12
% of adults aged 25-59	61
% of young adults (aged 16-24)	4
% of children (aged < 16)	22
% from Scotland	98
% from England	1
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	59
% on an overnight stay in area	6
% who travelled to the site by car or van	90
% who walked all the way	6
Visit Details	
% of repeated visitors	91
% who visit at least once a day	11
Average length of stay at site	1 hr
% whose main activity was dog walking / other walking	57 / 26
% whose main activity was Cycling / MTB on waymarked tracks	4
Value of forest	
% whose only reason for visiting area was the forest	9
Average expenditure per visit (£)	7

SUMMARY OF RESULTS BY FOREST DISTRICT – YEAR 3

	Ae	Cowal & Trossachs	Fort Augustus	Inverness	Kincardine
<i>Estimated total visits</i>	413,000	471,000	268,000	639,000	789,000
<i>Sex</i>	Over half of visitors were male (56%).	Fairly even male/female split.	Fairly even male/female split.	Over half of visitors were male (57%).	Fairly even male/female split.
<i>Age/lifestyle</i>	43% aged 45 or over.	Highest proportion of parties with children (17%).	An older age profile – 48% aged 45 or over.	An older age profile – 47% aged 45 or over.	Younger age profile – 36% aged 45 or over.
<i>Type of trip</i>	Slightly over three quarters on a day trip (79%) – 45% on local day trip (<6miles).	High proportion on overnight visit (34%). Slightly higher proportion on day trip of more than 6 miles (38%).	Highest proportion on overnight trips (37%). 46% on local day trip.	Over half on a local day trip (55%). Smaller proportion on overnight visit (17%).	Highest proportion on local day trip (59%) and 35% on a day trip of over 6 miles.
<i>Travel to forest</i>	Almost three quarters travelled up to 15 miles to reach the site visited (73%).	Highest proportion of visitors who travelled more than 25 miles (23%). However, 44% travelled less than 6 miles.	Over half travelled less than 6 miles to reach the forest visited (56%).	Almost two-thirds travelled 6 miles or less (63%).	Vast majority (92%) travelled 15 miles or less to reach the site visited.
<i>Transport used</i>	The vast majority travelled by car / van (88%).	Slightly under three-quarters travelled by car / van (74%), while two in ten came on foot (20%).	More likely than most of other districts to walk to the site visited (29%).	More likely than most of other districts to walk to the site visited (25%).	The vast majority travel by car/van (90%).
<i>Frequency of visits</i>	Slightly over four-fifths were on a repeat visit (84%).	Most likely to be on first visit (28%).	Three-quarters were on a repeat visit (75%).	Slightly over four-fifths were on a repeat visit (83%).	Most likely to be on a repeat visit (91%).
<i>Duration of visits</i>	Longer than average visit of 1 hr 41mins.	Longest average visit of 1 hr 49 mins.	Average visit of 1 hr 12 mins.	Shortest average duration of 59mins	One of the shortest average visits of 1 hr .
<i>Activities undertaken</i>	48% took part in dog walking, 13% cycled or took part in mountain biking.	55% took part in walking without a dog.	52% walked with a dog. 29% took part in other walking.	24% took part in cycling/mountain biking and 13% walked without a dog.	Highest proportion of dog walkers (57%).
<i>Expenditure per day</i>	£19	£28	£35	£21	£7

3.3. SCOTLAND 'ALL FORESTS' VISITOR SURVEY – FINAL REPORT

General Information

Three years of surveying was undertaken from June 2004 to June 2007. A range of results from across the three years of surveying are presented below.

Summary

Slightly over half of visitors to FCS forests were male (54%), and just over two-fifths of all visitors were aged 45 and over (43%). The average party size was 2.1 people with slightly less than half of respondents visiting on their own (42%). Almost half of the visitors were on a local day trip of less than six miles from the site (49%). The daily average spend of those who spent any money was £17.

Results

	Total
Estimated number of visits (thousands)	8.7
Number of interviews	2 694
Visitor profile	
% of male visitors	54
% of senior citizens (aged 60+)	17
% of adults aged 25-59	60
% of young adults (aged 16-24)	6
% of children (aged < 16)	16
% from Scotland	85
% from England	10
Trip Details	
% on a local day trip who travelled less than 6 miles to the site	49
% on an overnight stay in area	18
% who travelled to the site by car or van	78
% who walked all the way	18
Visit Details	
% of repeated visitors	84
% who visit at least once a day	20
Average length of stay at site	1 hr 23m
% whose main activity was dog walking / other walking	50 / 29
% whose main activity was Cycling / MTB on waymarked tracks	10
Value of forest	
% whose only reason for visiting area was the forest	23
Average expenditure per visit (£)	17



SUMMARY OF KEY RESULTS BY FOREST DISTRICT 2004 - 2007

	Dornoch	Inverness	Fort Augustus	Lochaber	Lorne	West Argyll	Moray	Aberdeenshire	Tay	Cowal	Scottish Lowlands	Scottish Borders	Ae	Galloway
Estimated total visits ('000s)	119	639	268	559	297	292	360	694 Buchan 789 Kincardine	717	471	938	821	413	812
Visitor profile	Larger than av. % with children <16 (28%)	Higher than av. % Affluent Achievers (53%)	Higher than av. % aged 45+ (48%)	Higher than av. % aged 45+ (52%)	Higher than av. % aged 45+ (56%)	Larger than av. % age 35-59 (54%)	Larger % of female visitors (54%)	Larger than av. % with children <16 (19%)	Higher than av. % aged 45+ (53%)	Larger than av. % with children <16 (23%)	Higher than av. % Hard Pressed (33%)	Higher than av. % aged 16-34 (35%). More males (65%)	Larger % of female visitors (54%)	Higher than av. aged 45+ (48%). More males (62%)
Type of trip	Higher than av. % on local day trip (56%)	Higher than av. % on local day trip (55%)	Higher than av. % on holiday (37%)	Higher than av. % on holiday (51%)	Higher than av. % on holiday (46%)	Higher than av. % on local day trip (56%)	Very high % on local day trip (73%)	Higher than av. % on over 6 miles from home day trip (43%)	Mix of local, day trip and holiday visitors.	Mix of local, day trip and holiday visitors.	Highest. % on local day trip (76%)	Highest % on over 6 miles from home day trip (57%)	Mix of local, day trip and holiday visitors.	Higher than av. % on over 6 miles from home day trip (43%)
Travel to forest	Vast majority travel by car (82%)	Higher than av. % walked (25%)	Higher than av. % walked (29%)	Higher than av. % cycled to forest (6%)	Higher than av. % walked (37%)	Higher than av. % walked (41%)	Higher than av. % car (87%)	Higher than av. % car (90%)	Higher than av. % car (86%)	More than av. (23%) travelled over 25 miles to forest	Higher than av. % walked (37%)	Much more than av. (34%) travelled over 25 miles to forest	Higher than av. % car (88%)	Vast majority travel by car (84%)
Frequency of visits	87% on repeat visit.	83% on repeat visit. Fairly high av. visits per year (118).	75% on repeat visit. Low av. visits per year (75).	73% on repeat visit. Low av. visits per year (77).	Highest. % on first visit to forest (33%).	Higher than av. % on first visit to forest (28%)	Vast majority (94%) on repeat visits	Vast majority (90%) on repeat visits	79% on repeat visit.	Higher than av. % on first visit to forest (28%)	Vast majority (94%) on repeat visits. Highest av. visits per year (163).	Lowest av. visits per year (57)	84% on repeat visit.	Vast majority (91%) on repeat visits
Average duration of visits	59min	59min	1hr 12min	1hr 9min	1hr 26min	1hr 20min	1hr 3min	1hr 13min	1hr 36min	1hr 49min	1hr 8min	2hrs	1hr 41min	1hr 31min
Activities undertaken	Higher than av. % of dog walkers (58%)	Higher than av. % cycling/mountain biking (24%)	52% walked with a dog, 29% took part in other walking.	Variety- 53% dog walking, 29% other walking, 10% cycling	Higher than av. % of walking without dog (39%)	Higher than av. % of walking without dog (44%)	Highest % of dog walkers (70%)	Variety- 55% dog walking, 32% other walking, 5% cycling.	Majority walking with or without a dog (55% and 33%)	Highest % of walking without dog (55%)	Majority walking with or without a dog (53% and 22%)	Highest % of cycling/mountain biking (48%)	48% dog walking, 13% cycling or mountain biking.	Higher than av. % of dog walkers (62%)
Average expenditure on day of visit	£19	£21	£35	£30	£34	£13	£25	£6	£23	£28	£6	£27	£19	£4

3.4 SCOTTISH RECREATIONAL SURVEY 2006

Scottish Natural Heritage (SNH) and Forestry Commission Scotland have jointly commissioned the Scottish Recreation Survey since 2003 to measure the participation levels in the outdoors. Over a 12 month period from January to December 2006, interviews were carried out on a monthly basis via TNS' Scottish Opinion Survey using CAPI hardware (Computer Aided Personal Interviewing). The interviews were conducted at 42 sampling points throughout the country.

Summary

From the 11,306 interviews carried out it has been estimated that there were around 327 million visits to the outdoors in Scotland in 2006. The total value of expenditure during these visits has been estimated at around £5.2 billion. Most of the results below relate to all outdoor recreation visits, although we are able to extract information on woodland visits.

Results

	Total
Number of completed questionnaires	11,306 ²
% who visited outdoors for leisure and recreational activities in the last 12 months	79
Trip Details	
% whose main destination was FC / FE managed woodland	8
% whose main destination was woodland managed by others or unknown manager	9
% whose visit included a visit to an FC / FE managed woodland	11
% whose visit included a visit to a woodland managed by others or unknown manager	13
% who travelled 5 miles or less to reach site (all destinations)	68
% whose main means of transport used on last visit was car / on foot (all destinations)	33 / 60
Visit Details	
% who visited at least once a week in the last 12 months / at least once or twice a month but less than once a week	44/10
% who made visits to the outdoors up to 3 hours	75
Activities	
% whose main activity was walking less than 2 miles / 2 - 8 miles during last visit	29/ 40
% who were on a family outing during their last visit	17
Scottish Outdoor Access Code	
% who had not heard about Scottish outside access code	48
% who had not encountered any access problems on their last visit	75
Economic Benefits	
% who spent something on their visit	44
Average £ expenditure on visits including those who spent nothing	16

3.5 SCOTTISH RECREATIONAL SURVEY 2007

Over a 12 month period from January to December 2007 questions were inserted into the Scottish Opinion Survey – a monthly Computer Aided Personal interview (CAPI) omnibus.

Summary

A total of 11,133 questionnaires were completed from which it is estimated that 336.7 million visits to the Scottish outdoors were made in 2007. With an average expenditure of £9 per visit, it has been estimated that the total value of expenditure during these visits was around £3.1 billion.

Results

	Total
Number of completed questionnaires	11,133 ²
% who visited outdoors for leisure and recreational activities in the last 12 months	80
Trip Details	
% whose main destination was FC / FE managed woodland	7
% whose main destination was woodland managed by others or unknown manager	9
% whose visit included a visit to an FC / FE managed woodland	9
% whose visit included a visit to a woodland managed by others or unknown manager	14
% who travelled 5 miles or less to reach site (all destinations)	67
% whose main means of transport used on last visit was car / on foot (all destinations)	31 / 61
Visit Details	
% who visited at least once a week in the last 12 months / at least once or twice a month but less than once a week	44/10
% who made visits to the outdoors up to 3 hours	80
Activities	
% whose main activity was walking less than 2 miles / 2 - 8 miles during last visit	37 / 38
% who were on a family outing during their last visit	14
Scottish Outdoor Access Code	
% who had not heard about Scottish outside access code	44
% who had not encountered any access problems on their last visit	80
Economic Benefits	
% who spent something on their visit	28
Average £ expenditure on visits including those who spent nothing	9