

VISITOR MONITORING TRENDS INDEX REPORT

**Report on the changes in visitor numbers from 1998 to 1999 for
Forest Enterprise and other comparable sites**

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1. INTRODUCTION

This paper presents information on the changes in visitor numbers at Forest Enterprise (FE) and other comparable sites between 1998 and 1999. A comparison of the results for FE and non-FE sites is also provided.

Figures on numbers of visits to Forest Enterprise sites are derived from Visitor Monitoring Trends Index data provided by Forest District and Territorial offices. The Trends Index uses monthly readings from a number of sources: vehicle counters, pay and display ticket sales, Forest Drive ticket sales, pedestrian counters, cycle counters and Visitor Centre counters. All sites in Great Britain for which there was enough available data have been included in analyses.

Numbers of visits to comparable sites are obtained from “Visits to Tourist Attractions, 1999”, published by English Tourism Council, Scottish Tourist Board, Wales Tourist Board and Northern Ireland Tourist Board. The data used in this analysis are restricted to Visitor Centres, Country Parks, Farms, Gardens, Wildlife Attractions and Miscellaneous Sites in Great Britain.

Section 2 summarises the results and section 3 outlines the methods used. More detailed results for FE sites in each country are available in the appendices.

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[Map not available online]

2. VISITOR MONITORING TRENDS INDEX RESULTS

2.1 Forest Enterprise Sites

Full Year Analysis

Analysis indicates that the overall number of visits to Forest Enterprise sites in Great Britain has slightly increased from 1998 to 1999. Visitor numbers in Scotland have shown a decrease, while those in England and Wales have risen by 1% and 9% respectively.

In Scotland, numbers to Visitor Centres have shown a large decrease, whilst visitors to other sites have shown little change. In England, visitor numbers at Visitor Centre sites and other sites have changed very little. Welsh sites saw a decrease in visitor numbers at Visitor Centres and an increase of 12% at other sites. Table 1 shows the percentage change in visitor numbers to Forest Enterprise sites from 1998-1999.

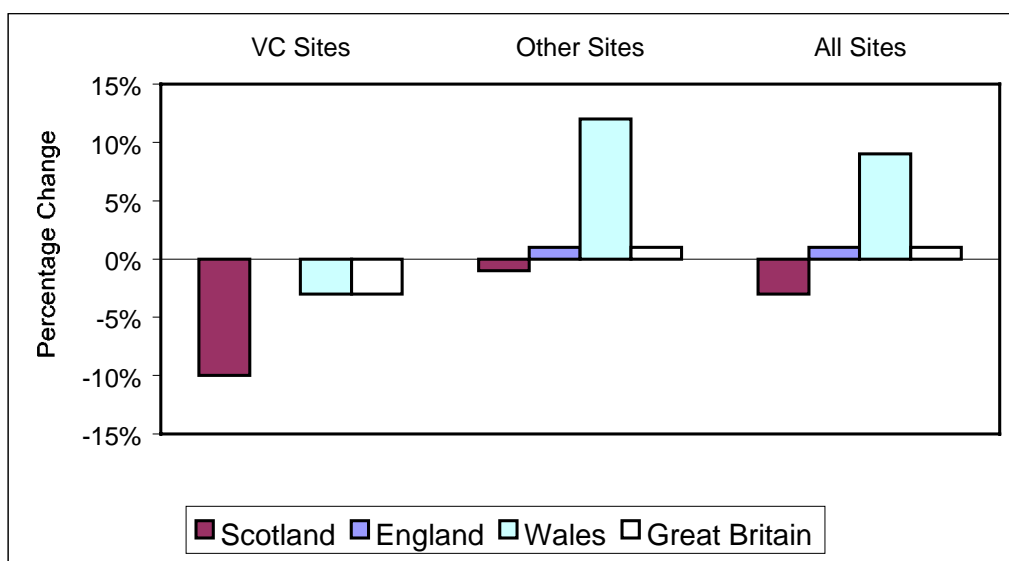
Table 1: Forest Enterprise Sites, 1998 to 1999

Percentage change in visitor numbers

	Visitor Centre sites	Other sites	All sites ¹
Scotland	-10%	-1%	-3%
England	0%	1%	1%
Wales	-3%	12%	9%
Great Britain	-3%	1%	1%

Chart 1: Forest Enterprise Sites

Percentage change in visitor numbers



¹ The overall percentage changes by country and GB are estimated using weighting derived from total visits to FE sites (see section 3.1)

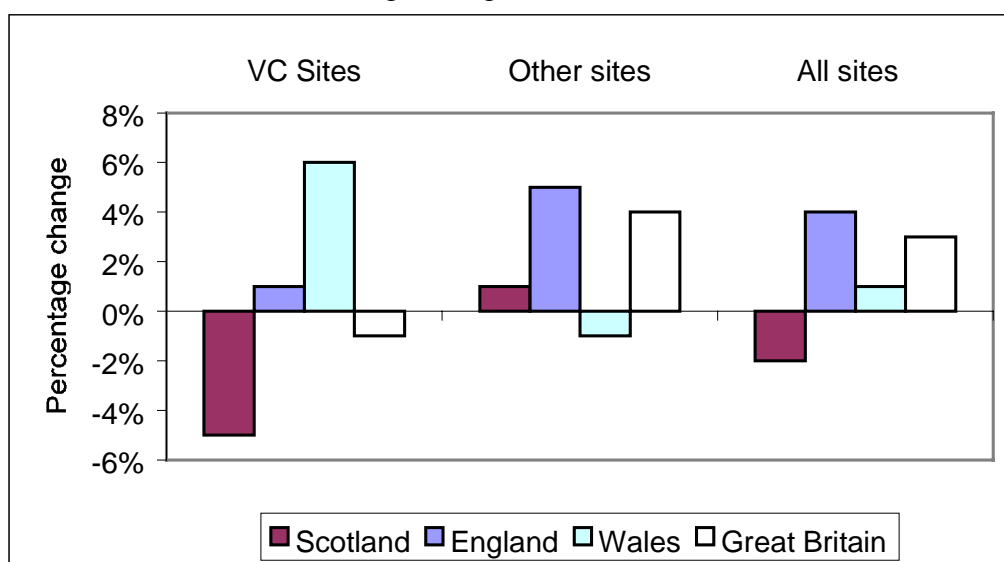
2.2 Non Forest Enterprise Sites²

Analysis of visitor numbers published in 'Visits to Tourist Attractions 1999' by the English Tourism Council, suggests that the number of visits to comparable non-Forest Enterprise sites in Great Britain has increased (by 3%) between 1998 and 1999. Tourist attractions in England have seen an overall increase in visitor numbers of 4%, numbers in Wales have shown a slight increase, whilst numbers in Scotland have fallen by 2%. Table 2 shows the percentage change in visitor numbers to non-Forest Enterprise sites from 1998-1999.

Table 2: Non Forest Enterprise Sites, 1998 to 1999
Percentage change in visitor numbers

	Visitor Centre sites	Other sites	All sites
Scotland	-5%	1%	-2%
England	1%	5%	4%
Wales	6%	-1%	1%
Great Britain	-1%	4%	3%

Chart 2: Non-Forest Enterprise Sites
Percentage change in visitor numbers



² Non-Forest Enterprise sites only include comparable sites with visitor numbers greater than 10,000 (see section 3.2)

2.3 Comparison of Figures for FE and Non FE Sites

Comparison of the overall mean percentage changes for Forest Enterprise and non-Forest Enterprise sites for the whole of Great Britain shows that visitor numbers at FE sites have increased slightly (+1%), but less than non-FE sites (+3%). In England, FE sites saw a slightly lower increase (+1%) in visitor numbers than non-FE sites (+4%). In Scotland, numbers at FE sites shown a slightly higher decrease (-3%) than non-FE sites (-2%). In Wales, FE sites appear to have done better (+9%) than non-FE sites (+1%). These results are summarised in Table 3.

Table 3: Percentage change in visitor numbers from 1998 to 1999

	All FE sites	All non-FE sites
Scotland	-3%	-2%
England	1%	4%
Wales	9%	1%
Great Britain	1%	3%

The mean percentage changes can be affected by a few extreme values, so it is also desirable to look at the full distribution of percentage changes. The attached charts illustrate the differences in percentage changes by type of site in each country. In each chart, half of the results are in the 'box' and the horizontal line shows the median value. The vertical lines cover most of the other values and the * symbols represent the extreme 10% of values at each end (note that these are not the outliers chosen to be excluded from category and country averages). For example, for FE other sites in Scotland, the median percentage change was -5%, the middle 50% of sites lay in the range -20% and 16%.

The charts show that the median values for all site types in Scotland and England are similar. (The large number of extreme values for other non-FE sites in England is due to there being far more data in this category than for any other). In Wales the median value for Forest Enterprise sites is higher than for non-Forest Enterprise sites.

[chart not available online]

3. Methodology

3.1 Forest Enterprise Sites

For each site, the percentage change is calculated between the readings provided in 1998 and those in 1999. These readings represent the counts recorded by the counters, which may be numbers of people, vehicles or axles. Any months for which there are missing or incorrect data in either year are excluded. Sites were excluded from this analysis if there was valid data for less than six months, or if there was a problem with the counter.

Counters for each type of location (Visitor Centre, other site) in each country (Scotland, England, Wales) were combined and a simple average of the percentage changes was then calculated for each of the 6 groups. The percentage changes for all Visitor Centres within each country are given equal weight. Percentage changes for other sites within each country are also given equal weight and are taken to be representative of Forest Enterprise sites not included. Smaller sites are given the same weighting as large sites, as these are a proxy for the numerous small sites that have no counter. The percentage change for all sites in each country was obtained using the weights shown in Table 4.

Table 4: Forest Enterprise Sites 1998 to 1999
Weights used: Estimated number of visitors (millions per year)

	Visitor Centre sites	Other sites	All sites
Scotland	1.0	4.0	5.0
England	3.0	39.5	42.5
Wales	0.5	2.0	2.5
Great Britain	4.5	45.5	50.0

Note:

1. The estimate of 50 million visitors per year is based on data from the UK Day Visits Surveys
2. Total numbers of visitors by country are based on an estimated 10%, 85%, 5% breakdown of the total for Scotland, England and Wales respectively.
1. The breakdown of figures for Visitor Centres and Other sites were calculated for use in this report for the last two years and have been kept the same.

3.2 Non Forest Enterprise Sites

The publication “Visits To Tourist Attractions 1999” by the English Tourism Council gives visitor numbers for sites with more than 10,000 visits per year. Sites listed in the report are included if:

- they are listed in the Visitor Centre, Country Parks, Farms, Gardens, Wildlife Attractions or Miscellaneous categories of the report
- visitor numbers for both 1998 and 1999 are provided
- they are not Forest Enterprise sites
- they had more than 10000 visits in both 1998 or 1999

For each of the selected sites, the percentage change between the number of visits recorded in 1998 and those in 1999 is calculated. The spread of percentage changes are then assessed for each type of location (Visitor Centre, other site) in each country (Scotland, England, and Wales).

Sites of each type (Visitor Centre, other site) in each country (Scotland, England, Wales) are combined and a simple average of the percentage changes is calculated for each of the 6 groups. Average percentage changes for all sites are then calculated for each country and for Great Britain.

These averages are designed solely for comparison with FE averages: they are not intended to indicate overall trends in visits to UK attractions. The Tourist Boards publication calculates the average percentage change to *all* attractions in Great Britain to be +1% between 1998 and 1999, including attractions with less than 10,000 visits. The individual averages for those categories included in this report are +7% for farms, +3% for wildlife attractions, +4% for gardens and country parks, and -1% for visitor centres.

TRENDS INDEX 1998-1999

Percentage change, valid counts and full year visitor estimates at Visitor Centres and other sites

Visitor Centre sites

Table A1.1

Forest District	Location	Cat.	Valid months	Valid Total ¹		% change
				1998	1999	
Scottish Borders	Dykescroft	VC	6	1,148	1,104	-4%
Cowal	Ardgartan VC	VC	7	-	36,170	
Dornoch	Ferry Croft Ctr/Side	VC	6	13,567	14,017	3%
Fort Augustus	Farigaig	VC	7	16,210	14,759	-9%
Fort Augustus	Kylehea Otter Haven	Ped	12	29,532	28,320	-4%
Galloway	Stroan	VC	7	-	83,198	
Galloway	Kirroughtree VC	VC	6	45,628	37,201	-18%
Inverness	Glenmore	VC	12	75,433	69,682	-8%
Tay	Queens View	VC	7	129,468	114,868	-11%
West Argyll	Barnluasgan	VC	9	12,496	8,509	-32%

% change 1998-1999 for VC sites in Scotland (outliers excluded): -10%

Category key

VC=Visitor Counter, Veh=Vehicle Counter, P&D =Pay and Display Tickets, Ped=Pedestrian Counter, FDT=Forest Drive Tickets

Notes

1. Total count registered by the counter in the valid months. This represents the number of people recorded passing the counter. No estimate was made for other months that the VC was open (some VCs were not open for 12 months).

Other sites

Table A1.2

Forest District	Location	Cat.	Valid months	Valid Total ¹		% change	Visitors per year ²	
				1998	1999		1998	1999
Aberfoyle	QEFP	Veh	11	22,247	25,461	14%	64,820	69,390
Aberfoyle	Strathyre	Veh	12	11,241	9,242	-18%	28,100	23,110
Aberfoyle	Rowardennan	Veh	11	27,756	25,508	-8%	75,330	65,930
Ae	Mabie	Veh	6	38,629	31,857	-18%		
Scottish Borders	Cardrona	Veh	12	69,365	64,100	-8%	152,600	141,020
Scottish Borders	Glentress	Veh	12	93,217	108,980	17%	195,760	228,860
Scottish Borders	Glentress	FDT	12	-	3,903			
Buchan	Essons CP	Veh	10	48,511	47,640	-2%	134,730	145,220
Buchan	Back o Bennachie	Veh	8	23,848	42,637	79%		
Buchan	Bin Car Park	Veh	9	26,795	25,202	-6%	43,770	44,610
Buchan	Donview (East)	Veh	6	9,174	10,608	16%		
Buchan	Donview (West)	Veh	8	4,279	2,849	-33%	15,260	14,150
Cowal	Cnoc na Dail	Veh	7	1,845	1,115	-40%		
Cowal	Rest & Be Thankful	Veh	8	76,195	69,933	-8%		
Cowal	Sannox	Veh	12	-	16,918			42,300
Cowal	Dyemill	Veh	6	1,332	900	-32%		
Cowal	Cruac Tarbeirt Walk	Ped	7	16,280	12,718	-22%		
Cowal	Lagaville	Ped	7	7,449	10,617	43%		
Dornoch	Balblair	Veh	12	8,840	11,346	28%	18,560	23,830
Dornoch	Ferrywood Walk	Ped	11	-	20,570			
Dornoch	Shin Falls	Ped	11	-	14,210			
Dornoch	Rosal	Ped	12	-	1,693			
Fort Augustus	Affric CFR Threshold	Veh	12	28,098	26,949	-4%	75,870	72,760
Fort Augustus	Beinn a'Mheadhoin	Veh	12	5,144	3,795	-26%	13,370	9,870
Fort Augustus	Dog Falls	Veh	9	8,339	8,944	7%	24,735	27,060
Fort Augustus	River Affric	Veh	12	13,197	10,547	-20%	34,310	27,420
Galloway	Clatteringshaws	P&D	7	8773	11572	32%		
Galloway	Stroan Bridge	Veh	12	66,539	59,050	-11%	179,660	159,440
Galloway	Kirroughtree	Veh	10	13370	17599	32%	39,800	51,510
Galloway	Stinchar Bridge	Veh	8	2,907	2,051	-29%		
Galloway	Bruce's Stone	Veh	12	44,198	36,330	-18%	119,340	98,090
Galloway	Carrick Forest Drive	FDT	6	1,368	2,419	77%		
Inverness	Glenmore	Veh	12	38717	16521	-57%	100,660	42,960
Inverness	Rogie Falls	Ped	12	55,881	60,393	8%		
Kincardine	Countesswells	Veh	12	68,132	70,590	4%	102,200	105,890
Kincardine	Kirkhill Main	Veh	10	11,395	9,099	-20%	27,440	23,900
Kincardine	Tyrebagger	Veh	12	9,971	12,077	21%	17,950	21,740
Kincardine	Scolty	Veh	10	11,621	15,729	35%	32,290	41,270
Lochaber	Linnhe	Veh	6	52,817	50,816	-4%		
Lochaber	Alt Na Calliche	Veh	7	2,949	2,393	-19%		
Lochaber	Ariundle	Veh	8	11,246	10,746	-4%		
Lochaber	Ciste Dubh	Veh	7	4,428	3,247	-27%		
Lochaber	Inchree	Ped	8	18,207	14,564	-20%		
Lorne	Aros Park	Veh	12	13,887	15,969	15%	38,880	44,710
Lorne	Glencoe Lochan	Veh	7	11,166	11,155	0%	41,310	40,870
Lorne	Sutherlands Grove	Veh	12	8,533	9,585	12%	21,330	23,960
Lorne	Sutherlands Grove	Ped	10	23,134	16,736	-28%		
Moray	Roseisle	Veh	12	16,281	18,858	16%	40,700	47,150
Moray	Wellhill	Veh	12	13,972	12,024	-14%	34,930	30,060
Tay	Glen Doll	P&D	12	-	23,885			

% change 1998-1999 for other sites in Scotland (outliers excluded): -1%

Category key

VC=Visitor Counter, Veh=Vehicle Counter, P&D=Pay and Display Tickets, Ped=Pedestrian Counter, FDT=Forest Drive Tickets

Notes

1. Total count registered by the counter in the valid months. This may represent the number of people or vehicle axles recorded passing the counter
2. Estimated number of visitors for the year. See methodology section 3.1

TRENDS INDEX 1998-1999

Percentage change, valid counts and full year visitor estimates at Visitor Centres and other sites

Visitor Centre Counts

Table A2.1

Forest District	Location	Cat.	Valid months	Valid Total ¹		% change
				1998	1999	
Kielder	Kielder Castle VC	VC	9	35,312	33,248	-6%
Kielder	Hamsterley VC	VC	10	26,770	28,938	8%
Lakes	Grizedale VC	VC	12	70,423	60,580	-14%
NYM	Pinchinthorpe VC	VC	12	19,478	20,661	6%
NYM	Dalby VC	VC	8	43,536	44,520	2%
South East England	QEFP VC	VC	9	190,271	173,410	-9%
South East England	Pinetum VC	VC	12	-	55,544	
West Midlands	Birches VC	VC	12	92,901	96,301	4%
Westonbirt	Westonbirt	Ped	7	45,186	49,604	10%
% change 1998-1999 for Visitor Centre sites in England (outliers excluded):						0%

Category key

VC=Visitor Counter, Veh=Vehicle Counter, P&D =Pay and Display Tickets, Ped=Pedestrian Counter, FDT=Forest Drive Tickets

Notes

1. Total count registered by the counter in the valid months. This represents the number of people recorded passing the counter. No estimate was made for other months that the Visitor Centre was open (some Visitor Centres were not open for 12 months).

Other sites

Table A2.2

Forest District	Location	Cat.	Valid months	Valid Total ¹		% change	Visitors per year ²	
				1998	1999		1998	1999
East Anglia	High Lodge	FDT	12	35,515	34,899	-2%	106,550	104,700
East Anglia	Lynford (Red) Stag	P&D	8	6,562	5,285	-19%		
East Anglia	St Helens	P&D	6	4,781	4,976	4%		
Forest of Dean	Symonds Yat	Veh	12	74,339	72,171	-3%	185,850	180,430
Forest of Dean	Cycle Centre	P&D	12	8,418	13,629	62%		
Forest of Dean	Symonds Yat	P&D	12	40,993	45,166	10%		
Forest of Dean	Beechenhurst	Veh	12	74,242	78,069	5%	185,610	195,170
Forest of Dean	Beechenhurst	P&D	12	28,305	32,028	13%		
Kielder	Kielder Castle	Veh	12	15,706	9,548	-39%	45,550	27,690
Kielder	Kielder Castle CP	P&D	11	6,059	6,289	4%	18,000	18,800
Kielder	Hamsterley	FDT	12	32,360	35,625	10%	80,900	89,060
Kielder	Chopwell	Veh	12	33,688	38,938	16%	84,220	97,350
Kielder	Simonside	Veh	11	8,511	8,201	-4%	23,540	23,560
Kielder	Warksburn	Veh	12	2,429	1,766	-27%	7,040	5,120
Kielder	Bull Crag	Veh	6	2,210	1,885	-15%		
Kielder	Forest Drive	Veh	12	28,254	29,576	5%	79,110	82,810
Kielder	Hamsterley	Veh	12	71,401	78,583	10%	178,500	196,460
Kielder	Hepburn	Veh	12	6,365	6,293	-1%	15,910	15,730
Kielder	Kielder	FDT	12	12,903	10,653	-17%	32,260	26,630
Lakes	Grizedale Main	P&D	12	36,394	31,023	-15%		
Lakes	Grizedale Old	P&D	11	9,929	7,855	-21%		
Lakes	Whinlatter Main	P&D	12	28,068	21,920	-22%		
Lakes	Whinlatter Main	Veh	12	36,798	28,497	-23%	92,000	71,240
Lakes	Grizedale Kennels	P&D	12	6,847	4,835	-29%		
Lakes	Noble Knott	Veh	12	3,700	3,162	-15%	9,250	7,910
New Forest	Blackwater	Veh	6	19,989	24,741	24%		
New Forest	Bolderwood (E)	Veh	6	17,521	18,874	8%		
New Forest	Bolderwood (W)	Veh	11	-	43,463			
New Forest	Bolton's Bench	Veh	11	-	77,824			
New Forest	Hatchet	Veh	11	-	48,906			
New Forest	Moors Valley	Veh	9	131,358	119,691	-9%		
Northants	Salcey	P&D	9	3,059	3,419	12%		
NYM	Pexton	Veh	12	195,858	205,026	5%	489,650	512,570
NYM	Bickley	Veh	12	97,718	89,126	-9%	244,300	222,820
NYM	Falling Foss	Veh	12	-	11,568			28,920
NYM	Cow House	Veh	12	-	9,077			22,690
NYM	Clay Bank	Veh	12	-	38,989			97,470
NYM	Guisborough	Veh	12	-	50,484			126,210
NYM	May Beck	Veh	12	-	15,960			39,900
NYM	Newtondale	Veh	9	24,736	25,015	1%	73,280	73,280
NYM	Newtondale	FDT	12	17,982	19,271	7%	44,960	48,180
NYM	Dalby	FDT	12	93,831	101,984	9%	234,580	254,960
Peninsula	Eggesford	Veh	6	7,295	10,026	37%		
Peninsula	Cardinham	P&D	9	7,113	6,475	-9%		
Sherwood & Lincs	Blidworth Bottoms	Veh	12	76,055	77,389	2%	190,140	193,470
Sherwood & Lincs	Forest Centre	P&D	11	23,833	37,281	56%		
Sherwood & Lincs	Forest Centre	Veh	12	68,456	73,463	7%	171,140	183,660
Sherwood & Lincs	Thieves Wood	Veh	8	65,417	66,011	1%	237,120	241,320
Sherwood & Lincs	Chambers Farm	Veh	9	10,056	8,964	-11%	33,240	32,700
Sherwood & Lincs	Derbyshire Bridge	Veh	10	24,736	27,831	13%	77,040	88,220
Sherwood & Lincs	Goyt	Veh	8	57,362	64,015	12%	219,780	245,810
Sherwood & Lincs	Hoop Lane	Veh	8	14,836	12,774	-14%	56,470	55,280
Sherwood & Lincs	Longdale Lane	Veh	12	47,338	50,527	7%	118,350	126,320
Sherwood & Lincs	Nomans Hill	Veh	12	73,707	79,603	8%	184,270	199,010
South East England	Alice Holt	P&D	12	-	35,075			
South East England	Weald	P&D	12	-	19,810			
South East England	Bere	P&D	12	-	13,771			
South East England	Wendover Wood	P&D	9	31,636	35,431	12%		
West Midlands	Cannock	Veh	8	34,322	35,017	2%	116,730	119,060
West Midlands	Wyre	P&D	6	14,198	14,242	0%		
% change 1998-1999 for other sites in England (outliers excluded):						1%		

Category key

TRENDS INDEX 1998-1999

Percentage change, valid counts and full year visitor estimates at Visitor Centres and other sites

Visitor Centre sites Table A3.1

Forest District	Location	Cat.	Valid months	Valid Total ¹		% change
				1998	1999	
Canolbarth	Nant yr Arian VC	VC	6	30,883	21,987	-29%
Coed y Cymoedd	Garwnant Café	VC	6	10,783	10,750	0%
Coed y Cymoedd	Afan VC	VC	12	20,113	19,553	-3%
Dolgellau	Coed y Brenin VC	VC	9	36,639	44,364	21%
Dolgellau	Coed y Brenin café	VC	9	42,376	40,697	-4%

% change 1998-1999 for Visitor Centre sites in Wales (outliers excluded): -3%

Other sites Table A3.2

Forest District	Location	Cat.	Valid months	Valid Total ²		% change	Visitors per year ³	
				1998	1999		1998	1999
Canolbarth	Hafren	Veh	11	-	5955			
Canolbarth	Nant yr Arian	Veh	11	28,484	20,788	-27%	98,410	77,960
Canolbarth	Nant yr Arian VC	P&D	6	3,213	4,058	26%		
Dolgellau	Coed y Brenin	Veh	12	34,817	34,194	-2%	87,040	85,690
Dolgellau	Coed y Brenin VC	P&D	12	16,357	17,276	6%		
Dolgellau	Tan y Coed	P&D	12	1,653	1,969	19%		
Llanwrst	Newborough Beach	P&D	12	46,615	56,568	21%		
Llanwrst	Newb-Llyn Parc	P&D	7	547	1,401	156%		
Llanwrst	Lyn Geirionydd	P&D	12	3,331	3,376	1%		
Llanwrst	Caen y Coed	P&D	9	2,172	2,873	32%		
Llanwrst	Llyn Crafnant	P&D	12	2,211	2,631	19%		
Llanwrst	Coed Aber	P&D	11	4,149	4,759	15%		
Llanwrst	Moel Famau	P&D	12	8,864	11,533	30%		
Llanwrst	Bod Petrual	P&D	7	740	764	3%		

% change 1998-1999 for other sites in Wales (outliers excluded): 12%

Category key

VC=Visitor Counter, Veh=Vehicle Counter, P&D =Pay and Display Tickets, Ped=Pedestrian Counter, FDT=Forest Drive Tickets

Notes

1. Total count registered by the counter in the valid months. This represents the number of people recorded passing the counter. No estimate was made for other months that the Visitor Centre was open (some Visitor Centres were not open for 12 months).
2. Total count registered by the counter in the valid months. This may represent the number of people or vehicle axles recorded passing the counter
3. Estimated number of visitors for the year. See methodology section 3.1