



Comisiwn Coedwigaeth Cymru
Forestry Commission Wales

PUBLIC OPINION OF FORESTRY 2005: WALES

Results of the 2005 Welsh Survey of Public
Opinion of Forestry, carried out on behalf of the
Forestry Commission

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Executive Summary

2005 survey

In 2005 four separate public opinion of forest surveys were undertaken – in Great Britain (4,000 interviews), Scotland (1,000 interviews), Wales (1,000 interviews) and Northern Ireland (1,000 interviews).

This report presents results of the survey in Wales and compares with the Wales 2003 and the GB survey. It highlights any differences in opinion amongst adults in Wales by geographic region and socio-demographic variables (e.g. gender and age). Questions asked in the GB survey but not in the Welsh survey are summarised in Appendix 1, comparing results for the Wales sub-sample (258 interviews) with total GB results.

Forests, woodlands and trees in the media

51% of respondents in Wales had seen or read about UK forests, woodlands and trees in the last 12 months on the television, radio or in the newspapers. Topics most widely recognised include 'tree planting', 'public rights of access to woodland' and 'birds and other animals in woodlands'.

Benefits of forestry

88% of respondents in Wales selected at least one benefit that the woodlands near them provide for the local community. The top benefits of woodlands were that 'they provide places for wildlife to live', 'they improve the landscape' and 'they provide places for recreation (e.g. walking, cycling and horse riding)'.

Changes to woodland

52% of respondents would like more woodland in Wales, 37% would like neither more nor less and 1% would like to see less woodland in Wales. Of those respondents that desired more woodland in Wales, 43% wanted a little more, 30% wanted about half as much again, and 24% wanted more than half as much again.

3% of respondents were members of a community group involved in the conservation and/or management of local woods. 4% of respondents had been consulted about plans for creating, managing or using woodlands and 19% of respondents would like to be consulted in the future.

Of those respondents who had been consulted, or would like to be consulted in the future, regarding plans for creating, managing or using woodlands, 53% believed they have or would be able to influence the decisions.

If conifer plantations are to be clear-felled 36% of respondents favoured replanting the land with a mixture of conifer and broadleaved species. If methods other than clear-felling are used, respondents considered that 'a wider range of tree species', 'trees which are native to Wales' and 'a better woodland habitat for wildlife' were important.

87% of respondents said that they would support the planting of new woodlands if it were shown to reduce the frequency of flooding.

Wood products

50% of respondents had been shopping for wood products in the last few years. Of these respondents, 25% recognised the FSC logo and 12% recognised the PEFC logo.

If a label indicated that a wood product was made using Welsh timber, 23% of respondents would be more likely to buy it than another similar product and 48% said it would make no difference.

11% of respondents used wood as a fuel in their home, either on its own or with other fuels. Of those who did not use wood as a fuel, the main reasons given were that respondents were either 'happy with existing system' (40%), or that it was 'not practical for this property' (23%).

Woodland recreation

59% of respondents had woodland that they can get to easily without using a car or other form of transport.

69% of respondents had visited a woodland or forest in the last few years. 49% of these had visited woodlands in the countryside only, 20% had visited woodlands in and around towns only, and 30% had visited both. The main reason for the respondents who did not visit being that they were not interested in visiting (36%).

'Peace and quiet' (56%), 'attractive scenery' (54%), 'wildlife' (47%) and woodlands being 'in close/easy reach' (43%) were important factors when choosing to visit woodland.

15% of respondents said they and/or a member of their family had attended an organised learning activity or event or do with woodlands in the last 12 months. 10% had attended a school trip, 7% a guided walk or talk, and 4% some other event.

1. Introduction

Background

The Forestry Commission has conducted similar biennial surveys of public attitudes to forestry and forestry-related issues since 1995. In the initial surveys, a representative sample of 2,000 adults across Great Britain (GB) was surveyed.

Since 2001, the GB survey has been supplemented by surveys in Scotland and Wales, each interviewing 1,000 adults, to provide additional information tailored to each country's needs after devolution, taking account of the priorities in each country's forestry strategy ¹.

In 2003, the main survey was extended to include Northern Ireland, and the sample size increased to 4,120 adults. This provided information of public attitudes across the UK, enabled regional reporting in England and improved the precision of the main survey's results for Scotland and Wales. However, for 2005, the main survey reverted to GB, now with a sample size of around 4,000 adults, and a new supplementary survey of 1,000 adults in Northern Ireland was introduced.

In 2005 the Public Opinion of Forestry surveys comprised:

- A representative survey of around 4,000 adults across GB
- A representative survey of around 1,000 adults across Scotland
- A representative survey of around 1,000 adults across Wales
- A representative survey of around 1,000 adults across Northern Ireland

Core sets of questions were asked in all 4 surveys, other questions were survey-specific.

This report

This report gives results of the 2005 survey in Wales and, where possible, compares them with results of the GB survey and the 2003 survey in Wales. It also highlights any differences in opinion amongst adults in Wales by geographic region and socio-demographic variables (e.g. gender and age). Questions asked in the GB survey but not in the Wales survey are summarised in Appendix 1, comparing results for the Wales sub-sample (258 interviews) with total GB results.

In order to show a breakdown by geographic region, Wales has been divided into five regions by grouping unitary authorities; 'North Wales', 'Mid/West Wales', 'West South Wales', 'The Valleys', and 'Cardiff & South East Wales'. We also refer to MRS social grades in socio-demographic comparisons. The population is divided into two groups; ABC1, where the chief income earner in the household is a non-manual worker and C2DE, where the chief income earner in the household is a manual worker or is unemployed. Further details of these and other breakdowns are given in Appendices 2 and 3.

Separate reports are available for GB (which compares the 2005 results with previous surveys) and more detailed reports for England, Scotland and Northern Ireland.

¹ Woodlands for Wales – The National Assembly for Wales strategy for trees and woodlands, Forestry Commission, Aberystwyth, 2001

Survey design

The Wales information presented in this report is taken from the Beaufort Research Omnibus survey carried out from 3rd to 10th March 2005 on behalf of the Forestry Commission. The survey was based on a representative sample of around 1,000 adults (aged 16 or over) across Wales. They were selected from 68 sampling points throughout Wales. More details of the sample method are given in Appendix 4.

The Welsh information for 2003, presented for comparison, is taken from a similar Beaufort Research Omnibus survey carried out from 5th – 8th March 2003, also on behalf of the Forestry Commission.

The GB information presented in this report is taken from the RSGB General Omnibus survey carried out from 23rd February – 1st March 2005 by Taylor Nelson Sofres. The GB survey was based on a representative sample of around 4,000 adults (aged 16 or over) across Great Britain. They were selected from a minimum of 270 sampling points by a random location method. Further details of the GB sample method are given in Appendix 5. Around 6% of these interviews (258) were conducted in Wales.

All results are subject to the effects of chance in sampling, so a range of uncertainty (confidence interval) should be associated with any result from the survey. The confidence intervals take into account the effects of clustering, weighting and stratification in the survey design (see Appendix 4 and Appendix 5), which in total are estimated to produce a design effect of 1.5 (i.e. increase confidence intervals by a factor of 1.5).

- For questions asked to the whole Wales sample of around 1,000, the range of uncertainty around any figure should be no more than +/-4.6%.
- For responses of subgroups the range of uncertainty is higher. For males (477) and females (525) the range of uncertainty is no more than +/- 6.7%. For non-Welsh speakers (717) the range is +/-5.5% and for Welsh speakers (285) it is +/-8.7%.
- For questions asked of the whole GB sample of 4,000, the range of uncertainty around any figure should be no more than +/-2.3%.
- Differences of more than 5.2% between the Wales and GB surveys are statistically significant. Differences of 6.6% or more between the Wales 2003 and 2005 surveys are statistically significant.

Results are shown as percentages. These have been individually rounded so may not always total to exactly 100.

We have also used multivariate regression models to look at the relationship between responses and socio-demographic information (e.g. gender and age) or geographic region. The models identify variables that are statistically significant (i.e. they result in more than chance variation). Some of the variables found to be significant in the regressions may not have seemed significant when simply comparing percentages, because some other correlated variable may have been acting in the opposite direction. Further details of the variables used in the regression modelling and the correlation between them are given in Appendices 2 and 3.

2. Forests, woodlands and trees in the media

Respondents were asked whether they had seen or read about UK forests, woods or trees on the television, radio or in the newspapers in the last twelve months. In the 2005 survey, half of respondents (51%) in Wales recalled seeing or reading about at least one topic (Table 1). Respondents had mostly heard about 'tree planting' (26%), 'public rights of access to woodland' (26%), and 'birds and other animals in the woodlands' (23%). Recognition of topics rose slightly between 2003 and 2005.

Generally, recognition of topics was similar in the Welsh survey compared with the GB survey, where respondents were asked whether they had seen or heard about *British* forests in the last twelve months.

Table 1: Whether respondent has seen or read about UK forests, woods or trees in the last 12 months (%)

	Wales		GB
	2005	2003	2005
Tree planting	26	21	21
Public rights of access to woodland	26	20	23
Birds and other animals in woodlands	23	21	24
Forest and woodlands as places to visit	21	16	18
Protests about roads or other developments on woodland	20	17	18
Flowers and other plants in woodlands	16	15	15
Using forests/woodland as a learning or education resource *	14	-	-
Loss of ancient or native woodland	12	10	15
Restoration of ancient or native woodland	11	9	12
Selling public woodlands	10	7	9
Community woodlands / new local woodlands	10	6	10
Forests and woodlands as places for health and well-being *	10	-	-
Creation of new native woodlands	9	7	11
Tree pests and diseases	9	7	10
Wood for fuel / (short rotation coppice)	8	5	7
Timber transport	7	4	5
Labelling / certification of wood products	5	4	6
Recalling at least one topic	51	43	50

Base: All respondents - Wales 2005 (1,001), Wales 2003 (1,000), GB 2005 (4,000)

* new to survey in 2005

Regional comparisons

Respondents from North Wales (69%) were more likely to have recalled at least one of the listed topics, while those from The Valleys (34%) and West South Wales (43%) were less likely (Table 2).

Table 2 lists the ‘top 6’ most recognised topics and gives the regional breakdown. Respondents from The Valleys and West South Wales were less likely to have seen or read about ‘tree planting’, ‘birds and other animals in woodlands’, ‘forests and woodlands as places to visit’ and ‘flowers and other plants in woodlands’ than those from other regions.

Those living in North Wales and Cardiff & South East Wales were more likely to have seen or read about ‘public rights of access to woodlands’ and ‘protests about roads or other developments on woodlands’.

Table 2: Whether respondent has seen or read about UK forests, woods or trees in the last 12 months, by region (%)

	North Wales	Mid/ West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales
Tree planting	38	27	17	14	31	26
Public rights of access to woodland	40	17	22	18	27	26
Birds and other animals in woodlands	35	27	13	9	28	23
Forest and woodlands as places to visit	32	24	11	9	25	21
Protests about roads or other developments on woodlands	32	12	14	12	26	20
Flowers and other plants in woodlands	26	22	8	5	18	16
Recalling at least one topic	69	49	43	34	54	51

Base: All respondents (1,001)

Of the other listed topics, respondents from The Valleys and West South Wales were less likely than those from the other regions to have seen or read about ‘community woodlands / new local woodlands’, ‘tree pests and diseases’ and ‘creation of new native woodlands’.

Respondents from North Wales were more likely than those from the other regions to have seen or read about ‘restoration of ancient or native woodland’, ‘labelling / certification of wood products’, ‘using forests and woodlands as a learning or education resource’ and ‘forests and woodlands as places for health and well-being’.

Those living in North Wales and Cardiff & South East Wales were more likely to have recalled ‘loss of ancient or native woodland’, ‘selling public woodland’ and ‘wood for fuel / (short rotation coppice)’.

Respondents from West South Wales were less likely than those from other regions to have recalled having seen or read about ‘restoration of ancient or native

woodland', and those from North Wales and Mid/West Wales were more likely to have seen or read about 'timber transport'.

Socio-demographic comparisons

Respondents in Wales who were older, were in social grades ABC1, were Welsh speakers, had visited forests recently, or who lived in urban locations, were all more likely to have recalled at least one of the topics listed (Figure 1).

Considering each topic individually, respondents who had visited forests or woodlands recently were more likely to have recalled having seen or read about 16 of the 17 listed topics. For example, 31% of those who had visited forests or woodlands recently recalled having seen or read about 'public rights of access to woodlands', compared with 11% of those who had not visited forest or woodlands recently.

Older respondents were more likely than younger respondents to have recalled seeing or reading about 13 of the 17 topics. For example, 7% of those aged 16-34 years old, 15% of those aged 35-54 years old and 26% of those aged over 55 years old recalled having seen or read about 'flowers and other plants in woodlands'.

Welsh speaking respondents were more likely to have seen or read about 'forests and woodlands as places to visit', 'loss of ancient or native woodland' and 'selling public woodlands' than non-Welsh speaking respondents. For example, 19% of Welsh speakers and 9% of non-Welsh speakers recalled having seen or read about 'loss of ancient or native woodland'.

Males were more likely than females to recall having seen or read about 6 of the 17 topics, including 'public rights of access to woodlands' where 31% of males and 21% of females recalled having seen or read about this topic.

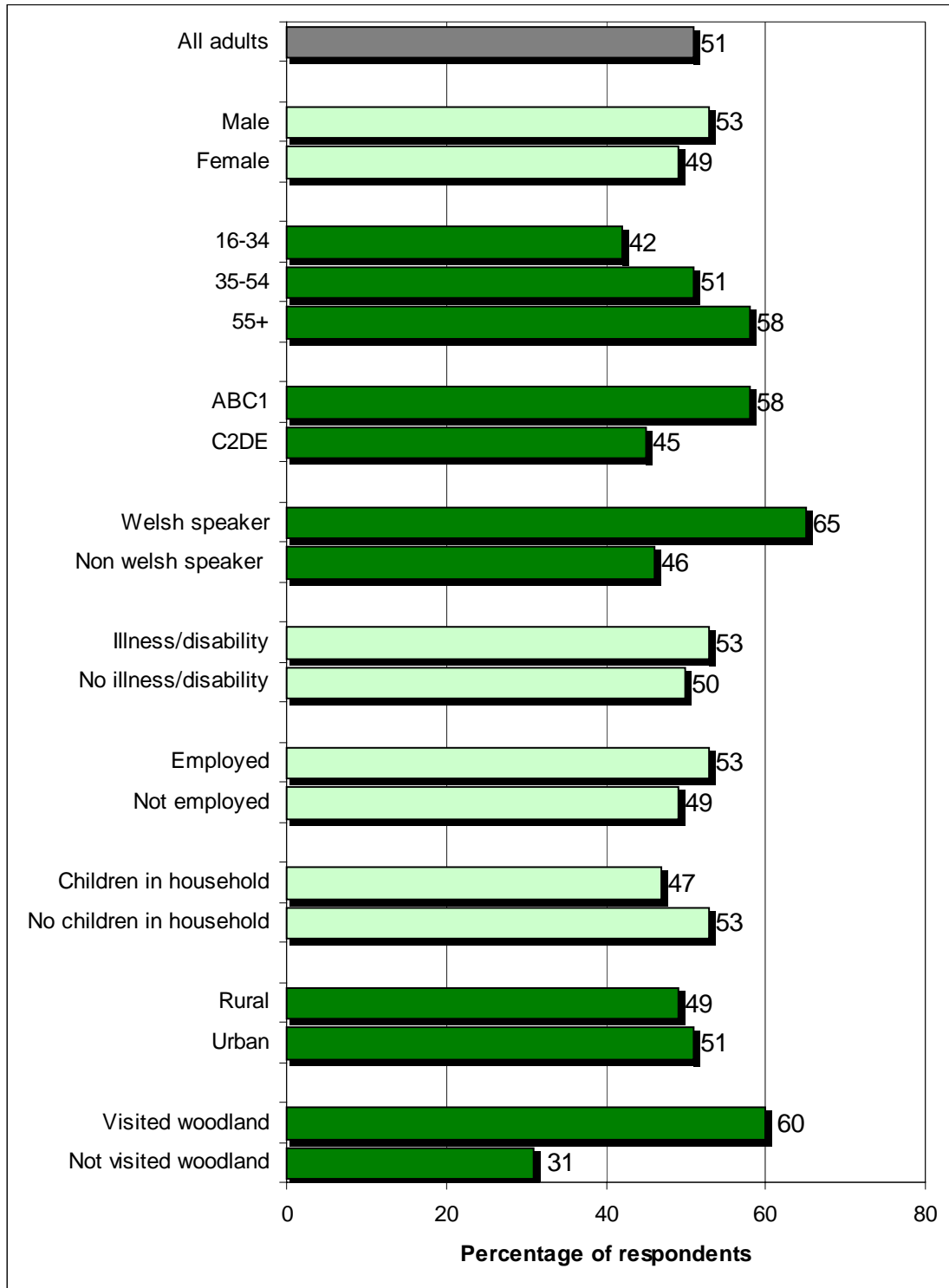
Respondents without children in their household were more likely to have seen or read about 'flowers and other plants in woodlands' (9% of those with children in their household, 20% of those without) and 'loss of ancient or native woodland' (7% of those with children, 14% of those without).

Respondents in social grades ABC1 were more likely to recall having seen or read about 'tree planting', 'birds and other animals in woodlands', 'loss of ancient or native woodland', 'restoration of ancient or native woodland' and 'labelling / certification of wood products'. For example, 31% of those in social grades ABC1 and 22% of those in C2DE recalled having seen or read about 'tree planting'.

Those respondents with a long-term illness or disability were more likely to recall having seen or read about 'tree planting', 'birds and other animals in woodlands', 'forests and woodlands as places to visit', and 'tree pests and diseases'. For example, 29% of those with a long-term illness or disability, and 18% of those without had seen or read about 'forests and woodlands as places to visit'.

Respondents living in urban locations were more likely to recall having seen or read about 'forests and woodlands as places to visit' and 'tree planting'. Those living in rural locations were more likely to have seen or read about 'wood for fuel / (short rotation coppice)' (7% of those living in urban areas, 15% of those living in rural areas). Those respondents in employment were more likely to have seen or read about 'forests and woodlands as places for health and well-being' and 'using forests and woodlands as a learning / education resource'.

Figure 1: Proportion of respondents who have seen or read about at least one topic, by socio-demographic variables



Base: All respondents (1,001)

NOTE: Dark green indicates statistically significant variable in multivariate model

3. Benefits of forestry

The Welsh Assembly Government funds forestry in many ways. Respondents were asked to select (from a list of possible benefits) how the woodlands near them benefit the local community. 88% of respondents selected at least one benefit.

The most frequently stated benefits that respondents believed the woodlands near them provided for the local community (Table 3) were that 'they provide places for wildlife to live' (64%), 'they improve the landscape' (54%) and 'they provide places for recreation' (52%).

In previous surveys and in the GB survey, respondents were asked to select (from a list of public benefits) good reasons to support Welsh (*British*) forestry with public money (see Appendix 1). Although the two questions asked about different things (whether benefits exist / whether they should be supported with public money), the top three answers were similar.

Table 3: Whether respondent believes the woodlands near them provide benefits for the local community (%)

	Wales
They provide places for wildlife to live	64
They improve the landscape	54
They provide places for recreation (e.g. walking, cycling and horse riding)	52
They can be used by local schools and other education groups	46
They help attract tourists to the area	44
They provide places for relaxation and stress relief	42
They are accessible to all in the community	35
They help reduce air and noise pollution	32
They create pleasant settings for developments around the community	27
They are just a benefit just knowing they are there	24
They give people in the community something on which they can work together	20
They support the economy	20
They provide wood as a renewable fuel	18
At least one benefit given	88

Base: All respondents (1,001)

Regional comparisons

Overall, respondents from North Wales (93%), West South Wales (93%) and Mid/West Wales (88%) were more likely than those from other regions to select at least one benefit that they feel the woodlands near them provide for the local community.

Table 4: Whether respondent believes the woodlands near them provide benefits for the local community, by region (%)

	North Wales	Mid/ West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales
They provide places for wildlife to live	75	65	58	49	66	64
They improve the landscape	60	51	49	53	55	54
They provide places for recreation (e.g. walking, cycling, horse riding)	68	54	44	31	56	52
They can be used by local schools and other education groups	63	41	43	31	46	46
They help attract tourists to the area	49	53	42	33	44	44
They provide places for relaxation and stress relief	56	39	34	27	47	42
At least one reason given	93	88	93	84	87	88

Base: All respondents (1,001)

Table 4 gives a regional breakdown of the 'top 6' benefits that woodlands provide for the local community. Looking at each of the benefits individually, respondents from The Valleys (49%) and West South Wales (58%) were both less likely to think that their local woodlands provided 'places for wildlife to live' than those from other regions.

Respondents from Mid/West Wales (53%) were more likely to think that the woodlands near them benefit the local community as 'they help attract tourists to the area'.

Respondents from North Wales were more likely to think that the woodlands provide 'places for recreation (e.g. walking, cycling and horse-riding)', 'places for relaxation

and stress relief' and that 'they can be used by local schools and other education groups'.

Respondents from The Valleys were less likely to believe that the woodlands near them benefit the local community as 'they can be used by local school and other education groups', and those from The Valleys and West South Wales were less likely to think that the woodlands provide 'places for recreation (e.g. walking, cycling and horse-riding)' and 'places for relaxation and stress relief'.

There were no regional variations in the proportion of respondents who believed the woodlands near them benefit the local community because 'they improve the countryside landscape'.

Of the 7 other listed benefits, there were few regional variations. Respondents from West South Wales were less likely to believe the woodlands near them benefit the local community because they 'provide wood as a renewable fuel' (10%) and 'they are accessible to all in the community' (19%). Those from Mid/West Wales and North Wales were more likely to believe 'they support the local economy' and were less likely to believe 'they are just a benefit knowing they are there'.

Socio-demographic comparisons

Respondents from social grades ABC1, those who had visited forests or woodlands recently and those who live in urban areas were all more likely to select at least one benefit the woodlands near them provide for the local community. For example, 94% of those who have visited forests or woodlands recently selected at least one benefit the woodlands near them provide for the local community, compared with 76% of those who have not visited forests recently.

Figure 2 considers differences in the top benefit woodlands provide for the local community. Respondents living in more urban areas, those from social grades ABC1, and those who had visited woodland in the last few years were more likely to think that the woodlands near them benefit the local community by 'providing a place for wildlife to live'.

Considering each benefit individually, respondents who had visited forests or woodlands recently were more likely to believe that each of the benefits listed were provided by the woodlands near them than those respondents who had not visited recently. Similarly, those in social grades ABC1 were more likely to believe 11 of the 13 listed benefits of woodlands, including 'they help attract tourists to the area' (51% ABC1 compared with 39% C2DE) and 'they improve the landscape' (62% ABC1 compared with 47% C2DE).

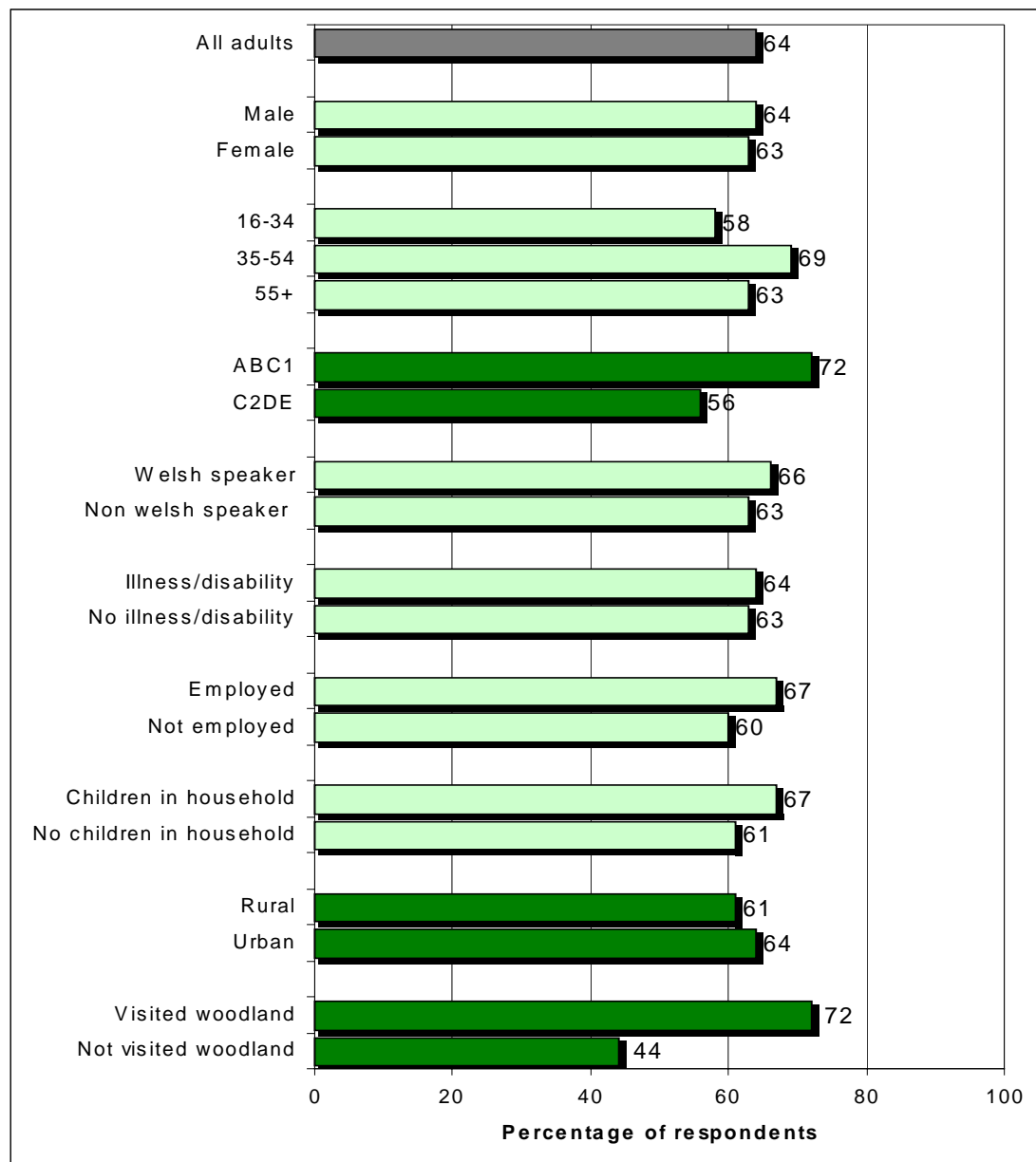
Respondents aged 16-34 years old were less likely to believe that the woodlands near them provided 6 of the 13 listed benefits for the local community. For example, 34% of those aged 16-34 years old, 47% of those aged 35-54 years old and 43% of those aged over 55 years believed 'they provide places for relaxation and stress relief'.

Those with a long-term illness or disability were more likely to believe the woodlands 'give people in the community something on which they can work together' (23% of those with a long-term illness, 19% of those without) and 'help reduce air and noise pollution' (35% of those with a long-term illness, 31% of those without).

Welsh speakers were more likely than non-Welsh speakers to believe the woodlands near them 'are accessible to all in the community' (44% of Welsh speakers, 31% of non-Welsh speaker)². Those respondents with children in their household were more likely to believe the woodlands 'provide wood as a renewable fuel' (21% of those with children in their household, 17% of those without).

Those respondents living in rural areas were more likely to believe the woodlands near them 'provide wood as a renewable fuel', 'give people in the community something on which they can work together' and 'are a benefit just knowing that they are there'. Those living in urban areas were more likely than those living in rural areas to believe the woodlands near them 'provide places for wildlife to live'.

Figure 2: Those who believe woodlands near them provide places for wildlife to live, by socio-demographic variables



Base: All respondents (1,000)

NOTE: Dark green indicates statistically significant variable in multivariate model

² In this report, where there are significant differences between Welsh speakers and non Welsh speakers, the region has been taken into account.

4. Changes to woodland

'Woodlands for Wales' states that the Welsh Assembly Government aims to find appropriate sites for new trees and woodlands and to move to a greater use of continuous cover systems. This section deals with questions relating to the change in woodland area and options for woodland management.

4.1 Desire for change in woodland area

Around half (52%) of those surveyed indicated that they would like to see more woodland in Wales (Table 5). This is significantly smaller than the GB proportion wanting more woodland in their part of the country (66%).

Just over two-fifths (43%) of those who indicated that they wanted more woodland in Wales would like to see a little more woodland, nearly a third (30%) wanted to see half as much again and a quarter (24%) would like to see more than half as much again.

Table 5: Desire for more woodland in Wales (%)

	Wales		GB
	2005	2003	2005
More than half as much again	12	14	18
About half as much again	16	22	24
A little more	22	21	23
More	52	59	66
Neither more nor less	37	25	29
Less	1	1	2
Don't know	10	15	4

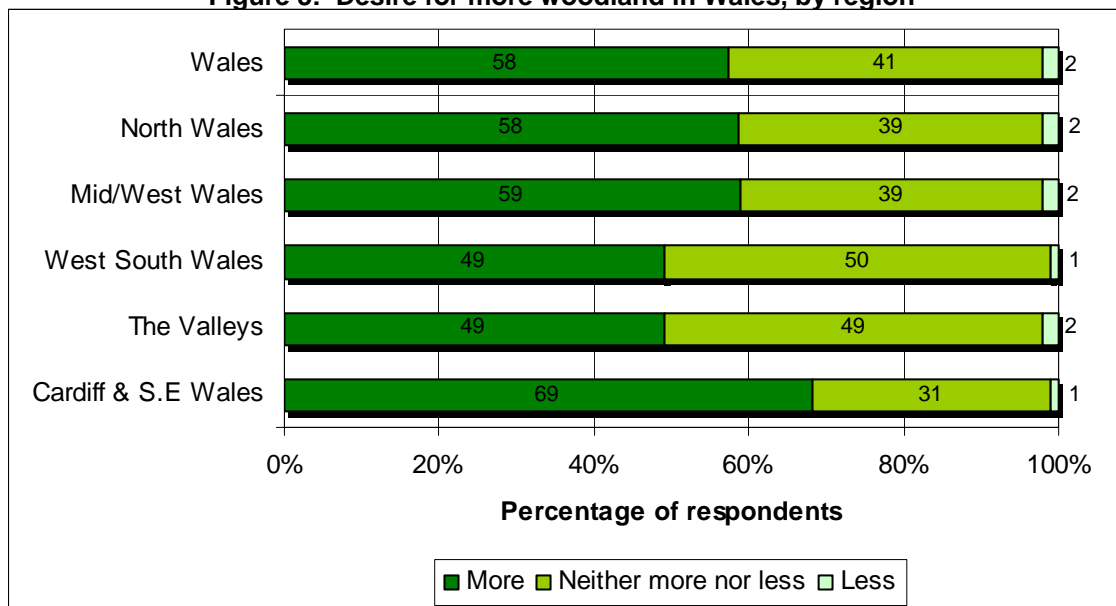
Base: All respondents - Wales 2005 (1,001), Wales 2003 (1,000), GB 2005 (4,000)

NOTE: In the GB survey, respondents were asked whether they would like more or less woodland 'in this part of the country'.

Regional comparisons

Of those who gave an opinion, respondents from Cardiff & South East Wales were more likely than those from other regions to want more woodland in Wales (Figure 3).

Figure 3: Desire for more woodland in Wales, by region



Base: Respondents who gave an opinion (902)

Socio-demographic comparisons

Of those who gave an opinion, respondents who had visited forests or woodlands in the last few years were more likely to want more woodland in Wales than those who had not made a visit. 65% of those who had visited forests or woodlands recently, and 37% of those who had not, wanted more woodland in Wales.

4.2 Public consultation over woodland change and use

The UK Forestry Standard³ encourages woodland owners to involve local communities when making decisions about changing the look or the use of woodlands.

A small number of respondents (2%) said they were members of a community group that was involved in the conservation and/or management of local woodlands.

Respondents were then asked whether they had ever been consulted, and would like to be consulted (again), about plans for creating, managing or using woodlands in their area. 4% of respondents in Wales said that they had been consulted about plans for creating, managing or using woodlands in their area, and 19% of respondents would like to be consulted in the future - compared with 42% of respondents in GB who would like to be consulted (Table 6).

³ FC (2004): The UK Forestry Standard (2nd Edition); the government's approach to sustainable forestry, Forestry Commission, Edinburgh

Table 6: Public consultation about plans for creating, managing or using woodlands in your area, by region (%)

	North Wales	Mid/ West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales 2005	GB 2005
Have ever been consulted	7	3	3	1	3	4	6
Would like to be consulted (again)	24	14	16	14	25	19	42

Base: All respondents - Wales (1,001), GB (4,000)

Of those respondents who had either been consulted previously, or would like to be consulted in the future, about plans for creating, managing or using woodlands in their area, over half (53%) believed they would be able to influence the decisions and a third (33%) that they would not. The remainder (14%) were unable to answer this question.

These questions were not asked in the 2003 Wales survey.

Regional comparisons

Respondents from North Wales were more likely to have been consulted about plans for creating, managing or using woodlands in their area. Those from North Wales and Cardiff & South East Wales were more likely to want to be consulted in the future (Table 6).

Of those respondents who have ever or would like to be consulted regarding woodlands in their area, those from West South Wales and North Wales were more likely to feel that they have influenced, or would be able to influence any decisions made regarding woodlands in their area.

Socio-demographic comparisons

Welsh speaking respondents and those who had visited forests or woodlands recently were more likely to be a member of a community group involved in the conservation and/or management of local woodlands.

Welsh speaking respondents and those in social grades ABC1 were more likely to have been consulted about plans for creating, managing or using woodlands in their area.

Respondents who had visited forests or woodlands recently (25% of visitors compared with 7% of non-visitors) and those in social grades ABC1 (23% ABC1 compared with 16% C2DE) were more likely to want to be consulted (again) regarding plans for woodlands in their area.

Of the respondents who had ever been, or would like to be, consulted regarding woodlands in their area, those who were in employment were more likely to believe that they had influenced or would be able to influence the decisions (59% of those in employment, 45% of those not in employment).

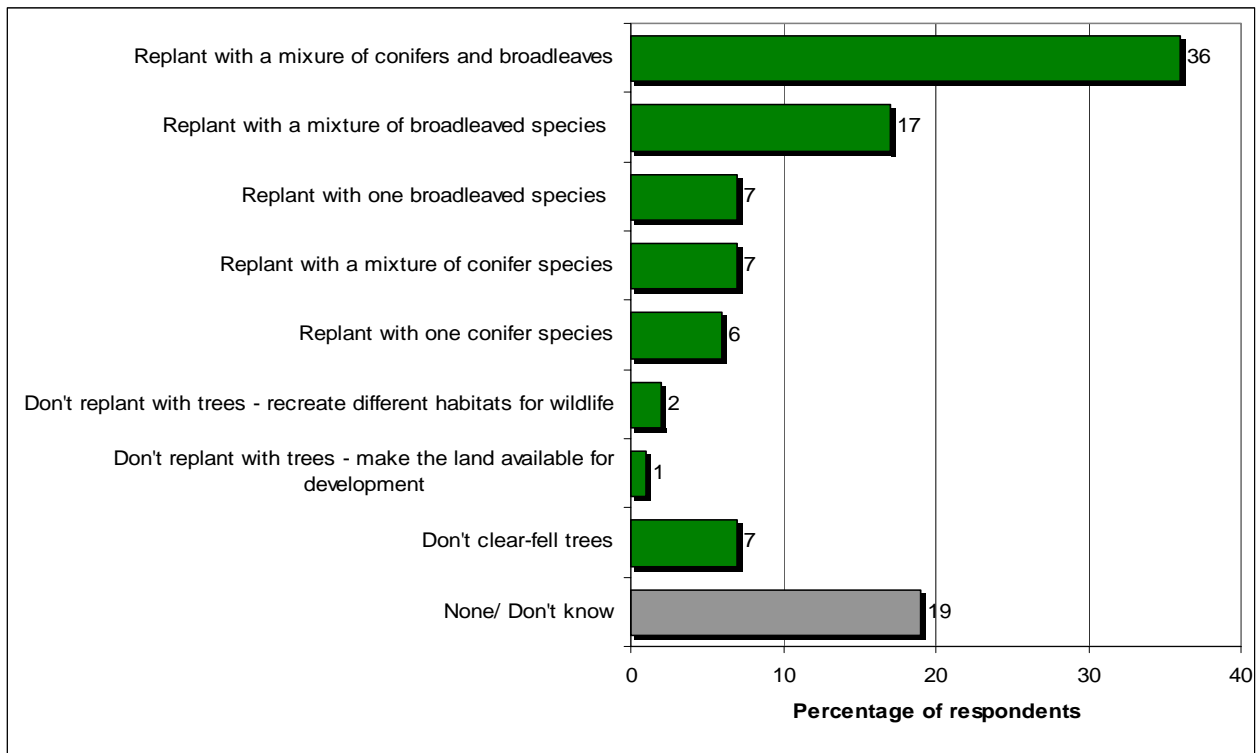
4.3 Post clear-fell options

Respondents were asked about land-use options for conifer woodlands in their area should they be clear-felled (i.e. if a stand of trees were felled at once). The most popular response (from a list of options) was 'to replant the land with a mixture of conifer and broadleaved species', as selected by 36% of respondents (Figure 4). In addition, 17% of respondents favoured replanting the land 'with a mixture of broadleaved species', 7% would like to see the land replanted 'with one broadleaved species' and 7% 'with a mixture of conifer species'.

A further 7% of respondents felt that the trees should not be clear-felled at all, and 19% either did not know or did not favour any of the options listed.

The number of options available to respondents was greater in the 2005 Wales survey than in the 2003 survey, where respondents had to choose from a list of only six land-use options. The top response in 2005, 'to replant with a mixture of broadleaved and conifer species' was not available in the 2003 survey. In 2003, the top response 'to replant with a mixture of broadleaved species' was given by 44% of respondents.

Figure 4: Suggestions for land use after clear-felling conifer plantations



Base: All respondents (1,001)

Regional comparisons

Respondents from The Valleys were the most likely to suggest replanting clear-felled land 'with a mixture of conifers and broadleaves', with those respondents from Mid/West Wales being more likely to suggest either to 'replant with a mixture of broadleaved species' or 'replant with one broadleaved species' (Table 7).

Respondents from North Wales were more likely to suggest replanting 'with a mixture of conifer species' and those from Mid/West Wales, to 'replant with one species'.

Respondents from West South Wales were more likely than those from other regions to suggest that we should not clear-fell conifer plantations.

Table 7: Suggestions for land use after clear-felling conifer plantations, by region (%)

	North Wales	Mid/West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales
Replant with a mixture of conifers and broadleaves	41	27	33	42	35	36
Replant with a mixture of broadleaved species	19	22	16	14	12	17
Replant with one broadleaved species	7	14	3	6	3	7
Replant with a mixture of conifer species	10	6	5	3	7	7
Replant with one conifer species	4	11	7	1	6	6
Don't replant with trees – but recreate different habitats for wildlife	2	3	1	3	1	2
Don't replant trees – make land available for development	2	*	1	*	1	1
Don't clear-fell trees	6	3	12	6	9	7
None of these/Don't know	9	13	21	24	25	19

Base: All respondents (1,001)

Socio-demographic comparisons

Respondents who were older (30% of those aged 16-34 years, 36% of those aged 35–54 years and 40% of those aged over 55 years), with children in their household (40% of those with children, 34% of those without) or had visited forests or woodlands recently (40% of those who had visited recently, 26% of those who had not) were more likely to suggest replanting 'with a mixture of conifers and broadleaves'.

Older respondents were more likely than younger respondents to suggest that we 'replant with a mixture of broadleaved species' or 'replant with one broadleaved species'.

Younger respondents were more likely to suggest that we 'replant with one conifer species' or 'don't clear-fell trees'. For example, 10% of 16-34 year olds, 7% of 35-54 year olds and 5% of those aged over 55 years suggested that we 'don't clear-fell trees'.

Also, respondents who were male (19% of males, 14% of females), in social grades ABC1 (20% ABC1, 14% C2DE) or had visited forests or woodlands recently (21% of visitors, 7% of non-visitors) were all more likely to suggest replanting 'with a mixture of broadleaved species'.

Welsh speaking respondents were more likely to suggest replanting clear-felled areas 'with one broadleaved species' (10% of Welsh speakers, 5% of non-Welsh speakers) and those living in urban areas were more likely to suggest that we 'don't clear-fell trees' (8% urban compared with 1% rural).

4.4 Alternatives to clear-felling

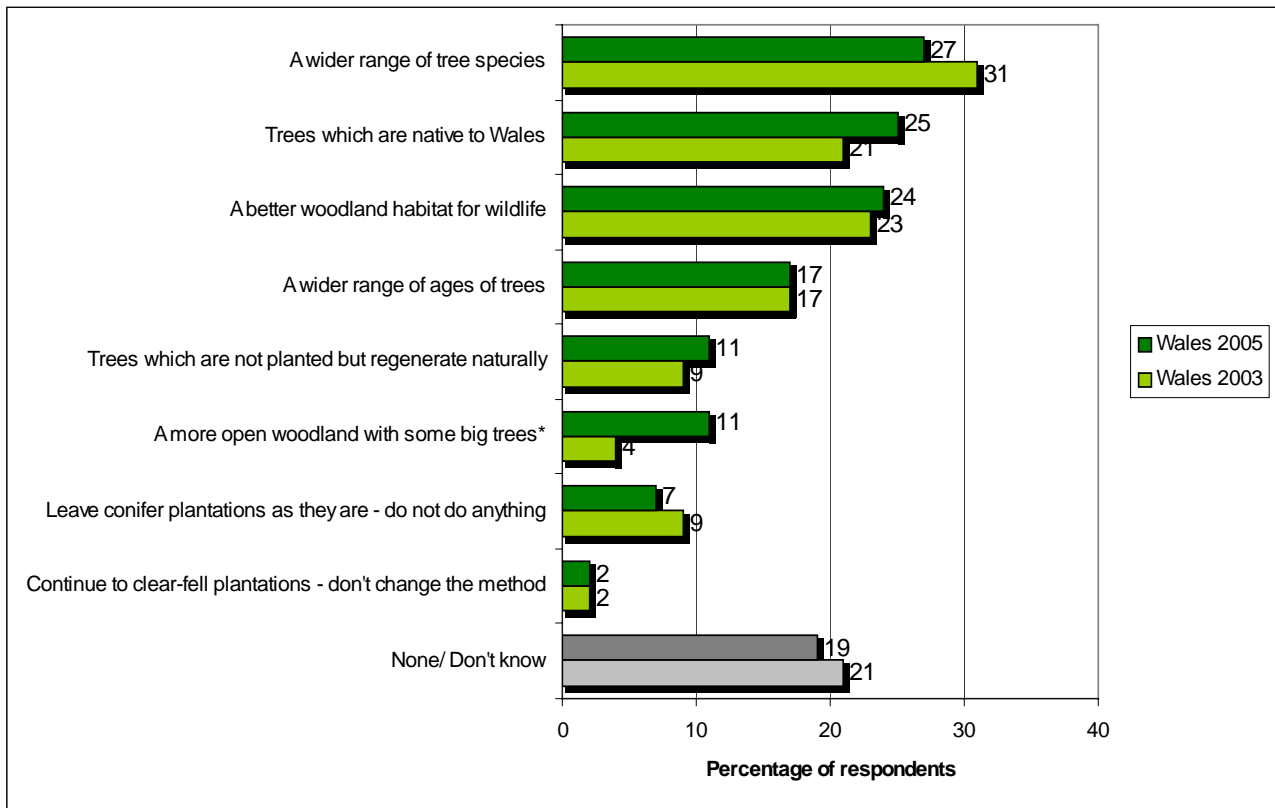
There are alternatives to clear-felling conifer plantations, which involve selectively felling some trees so that there are always trees present.

Respondents were asked, if an alternative to clear-felling were used, which factors were important in their opinion. Respondents were able to select more than one option from a list of factors.

27% of respondents felt that 'a wider range of tree species' was important, whereas 25% wanted 'trees which are native to Wales' and 24% felt that 'a better woodland habitat for wildlife' was important (Figure 5). 19% said that either they did not know or none of the options were more important to them.

The responses were similar to those in the 2003 survey.

Figure 5: Importance of various factors if not clear-felling conifer plantations



Base: All respondents - Wales 2005 (1,001), Wales 2003 (1,000)

NOTE: Respondents could select more than one option

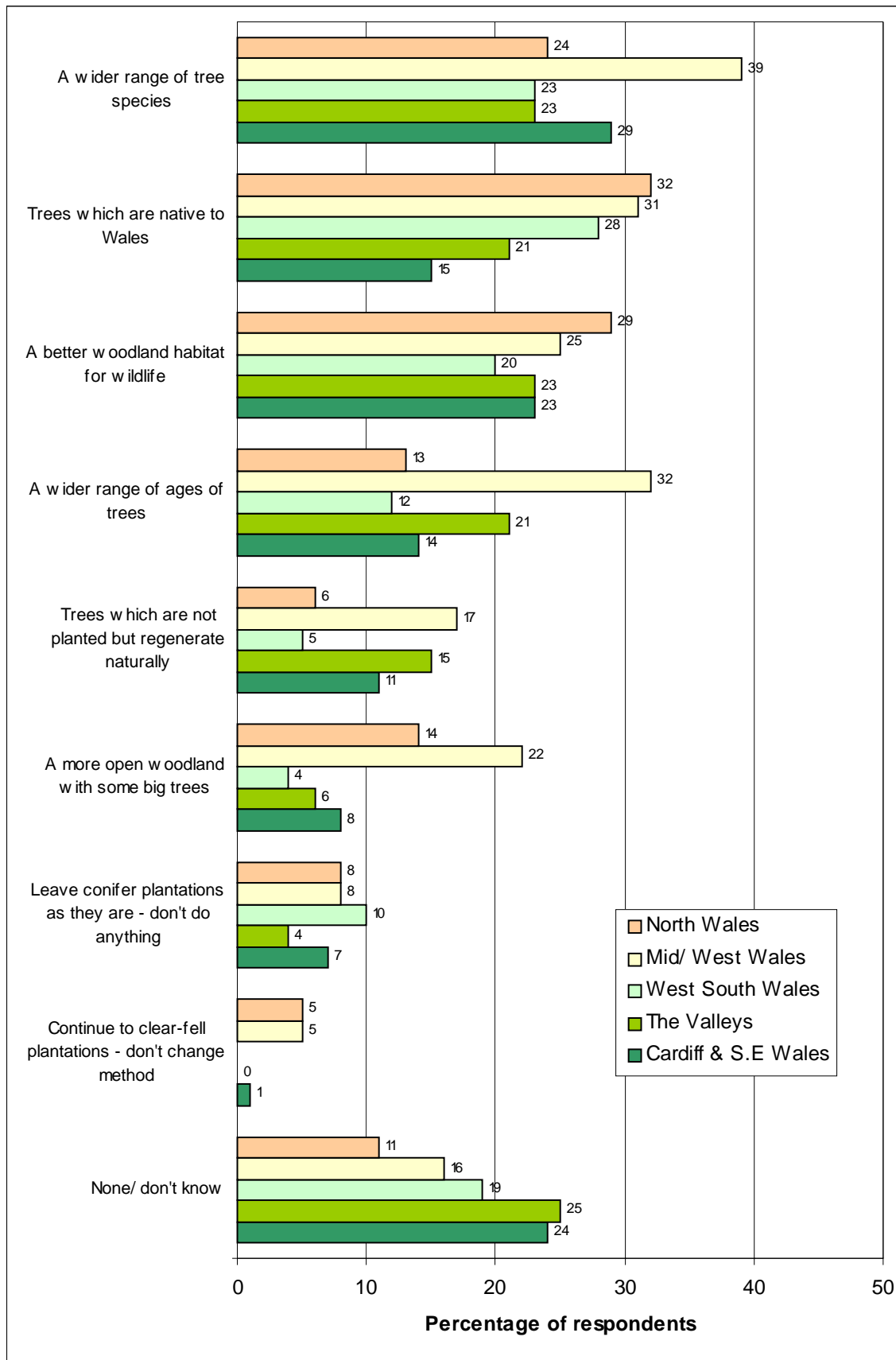
*Wording differed slightly in the 2003 survey

Regional comparisons

Figure 6 shows for each region the importance of factors in alternatives to clear-felling conifer plantations. Respondents from Mid/West Wales were more likely to think that 'a wider range of tree species' (39%) and 'a more open woodland with some big trees' (22%) were important than those from all other regions. Those respondents from Mid West Wales (32%) and The Valleys (21%) were more likely to think that 'a wider range of ages of trees' was important.

'Trees which are native to Wales' were seen as less important in Cardiff & South East Wales (15%) than in the other regions, and 'trees which are not planted but regenerate naturally' were seen as less important in North Wales (6%) and West South Wales (5%) than in the other regions.

Figure 6: Importance of various factors if not clear-felling conifer plantations, by region



Base: All respondents (1,001)

NOTE: Respondents could select more than one option

Socio-demographic comparisons

Respondents who had visited forests or woodlands in the last few years were more likely than non-visitors to say that 'a wider range of tree species', 'a wider range of ages of trees', 'trees which are native to Wales', 'trees which are not planted but regenerate naturally', 'a more open woodland with some big trees' and 'a better woodlands habitat for wildlife' were important factors. For example, 28% of visitors to woodlands said 'a better woodlands habitat for wildlife' was an important factor when considering alternatives to clear-felling conifer plantations, compared with 14% of non-visitors.

Welsh speaking respondents were less likely to consider 'a wider range of ages of trees', 'trees which are not planted but regenerate naturally' and 'a better woodlands habitat for wildlife' as important than non-Welsh speaking respondents. For example, 7% of Welsh speakers and 12% of non-Welsh speakers said 'trees which are not planted but regenerate naturally' was an important factor.

Those living in rural locations were more likely to feel that 'trees which are native to Wales', 'a more open woodlands with some big trees', 'a better woodlands habitat for wildlife' and 'trees which are not planted but regenerate naturally' are all important factors in considering alternatives to clear-felling conifer plantations. However, respondents living in rural locations (9%) were also more likely than those in urban locations (1%) to say that they should 'continue to clear-fell conifer plantations – don't change anything'.

'A wider range of ages of trees', 'trees which are not planted but regenerate naturally', and 'a more open woodland with some big trees' were more likely to be selected by older respondents (13% of those aged 16-34 years old, 18% of those aged 35-54 years old and 21% of those aged over 55 years old said 'a wider range of ages of trees' was important).

'Trees which are native to Wales' was more likely to be selected by respondents who had a long-term illness or disability (34% of those with a long-term illness, 22% without), 'a wider range of ages of trees' by those who are in employment (20% of those in employment, 15% of those not in employment) and 'a wider range of tree species' by those in social grades ABC1.

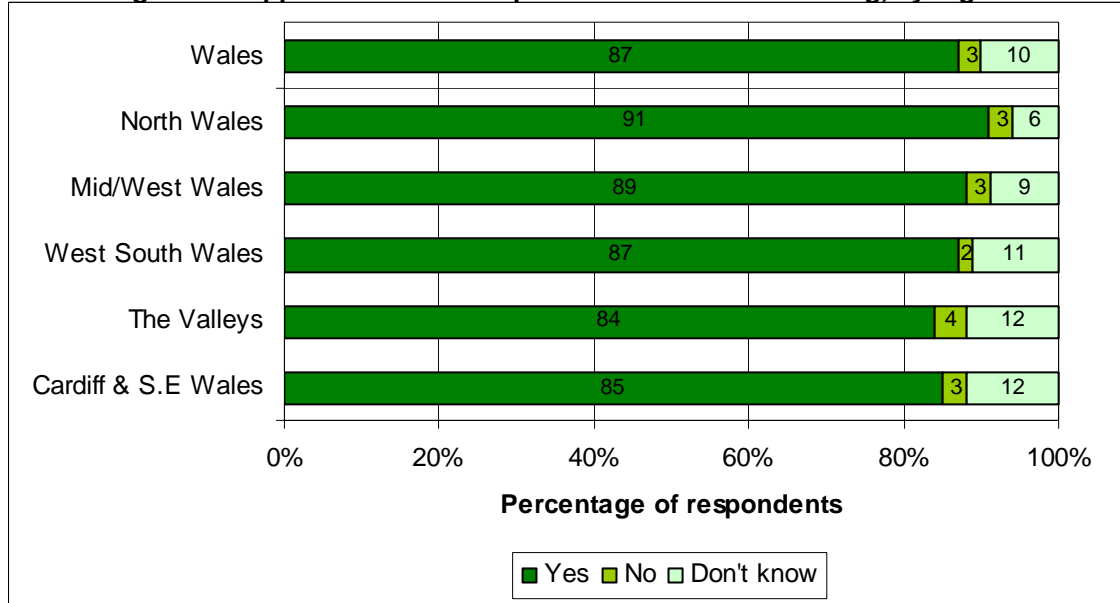
4.5 Reducing flooding through woodland plantation

The majority of respondents (87%) said that they would support the planting of new woodlands if they could be shown to reduce the frequency or intensity of flooding, 3% said that they would not, and the remaining 10% said they did not know.

Regional comparisons

Those from North Wales (91%) and Mid/West Wales (89%) were more likely than respondents from other regions to support the planting of new woodlands if they could be shown to reduce the frequency or intensity of flooding (Figure 7).

Figure 7: Support for woodland plantation to reduce flooding, by region



Base: All respondents (1,001)

Socio-demographic comparisons

Respondents more likely to support the planting of new woodlands if they could be shown to reduce the frequency or intensity of flooding were: those with a long-term illness or disability (92% of those with an illness or disability, 85% of those without), those in social grades ABC1 (90% ABC1, 84% C2DE), those who had visited forests or woodlands recently (93% of visitors, 75% of non-visitors) and those from urban areas (88% urban, 83% rural).

Older respondents were more likely than younger respondents to support the planting of new woodlands (81% of those aged 16-34 years old, 89% of those aged 35-54 years old and 90% of those aged over 55 years old) if they could be shown to reduce the frequency or intensity of flooding.

5. Wood Products

5.1 Awareness of 'certified symbols' on wood products

The Forest Stewardship Council (FSC) and Programme for Endorsement of Forest Certification (PEFC) are schemes that certify woodlands as well as wood and wood products originating from sustainably managed woodland. Each scheme has a logo, which is displayed on certified products.

In the 2005 Wales survey, half of the respondents (50%) had been shopping for wood products in the last few years (Table 8). This percentage was slightly higher in the Wales survey than in the GB survey where 44% of respondents had been shopping for wood products in the last few years.

Table 8: Whether respondent had been shopping for wood products in the last few years (%)

	Wales	GB
Proportion of respondents who had been shopping for wood products	50	44



Base: All respondents - Wales (1,001), GB (4,000)

Those respondents who had been shopping for wood products in the last few years were then asked if they had seen either the FSC or the PEFC logos on wood products such as furniture, toys or worktops. A quarter of respondents who had been shopping for wood products in the last few years recognised the FSC logo, and 12% recognised the PEFC logo (Table 9). Nearly two-thirds (63%) of respondents did not recognise either logo.

Recognition of the FSC logo was lower in the Wales survey than in the GB survey, where 38% of GB respondents recalled having seen the logo. However, recognition of the PEFC logo was slightly higher (12% of respondents in Wales recognised the PEFC logo, compared with 8% in GB).

Neither of these questions was included in the 2003 Wales survey.

Table 9: Recognition of FSC and PEFC logos on wood products (%)

	Wales	GB
FSC logo 	25	38
PEFC logo 	12	8
None	63	56
Don't know	6	3

Base: Respondents who had been shopping for wood products: Wales (503), GB (1,752)

Regional comparisons

There were no regional variations in the proportion of respondents who had been shopping for wood products at all in the last few years.

Of the respondents who had been shopping for wood products in the last few years, those from West South Wales (5%) were less likely than those from other regions to have recognised the PEFC logo.

Socio-demographic comparisons

Respondents who were in employment (62% of those in employment, 39% of those not in employment), or had visited forests of woodlands recently (59% of visitors, 31% of non-visitors) were more likely to have been shopping for wood products in the last few years. This is also true for those respondents with children in their household (57% of those with children, 47% of those without).

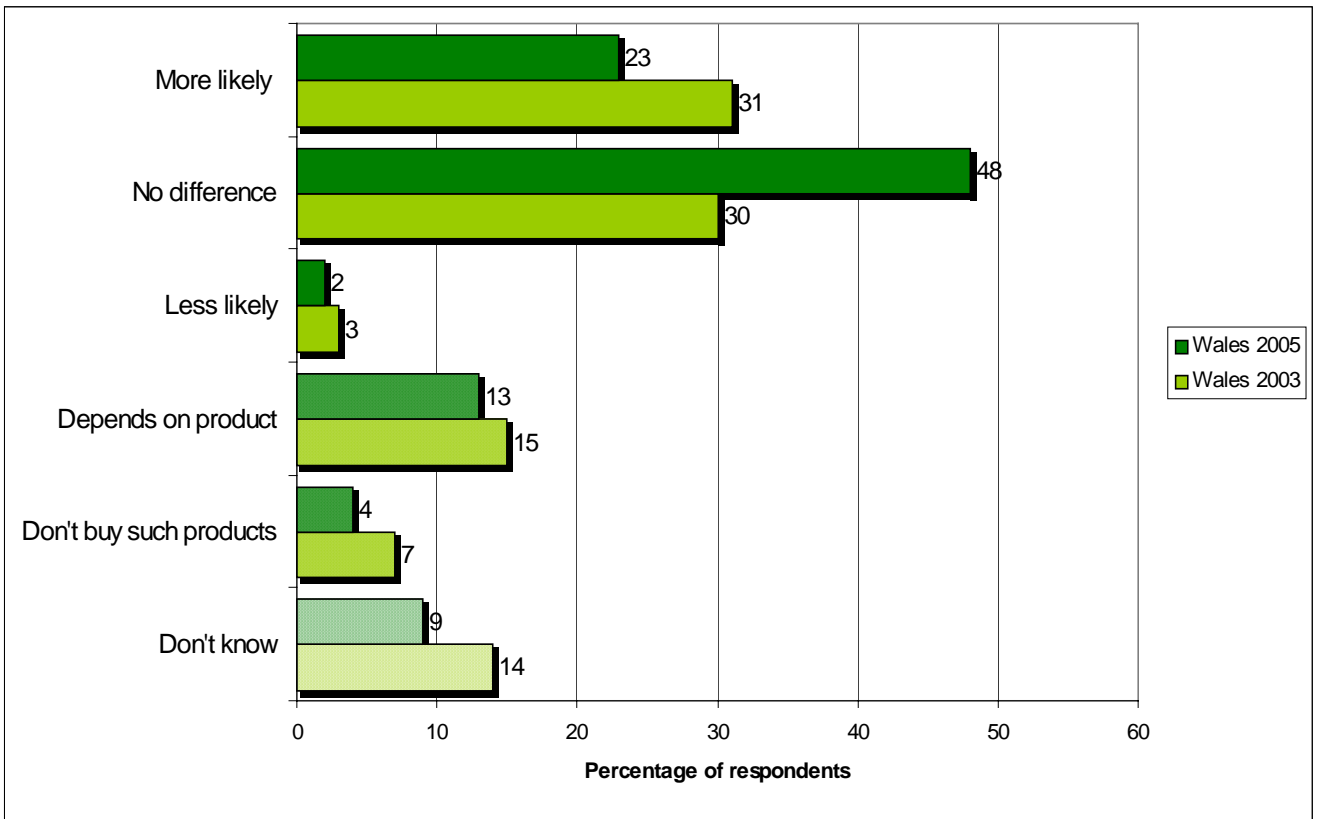
Of the respondents who had been shopping for wood products, those who had visited forests or woodlands recently were more likely to recognise both the FSC and PEFC logo (28% of visitors to woodlands had seen the FSC logo, compared with 11% of those who had not visited woodlands recently).

5.2 Wood products from Welsh timber

Respondents were asked whether they would be more or less likely to buy a product labelled as being made using Welsh timber than another similar product. Almost a quarter of respondents (23%) indicated that the presence of such a label would make them more likely to buy the product, whilst nearly a half (48%) claimed it would make no difference (Figure 8). 2% of respondents said they would be less likely to purchase a wood product if they knew it was made of Welsh timber.

In addition, 13% of respondents said it would depend on the product and a further 4% indicated that they did not buy any such wood products.

Figure 8: Likelihood of buying wood product if made of Welsh timber



Base: All respondents - Wales 2005 (1,001), Wales 2003 (1,000)

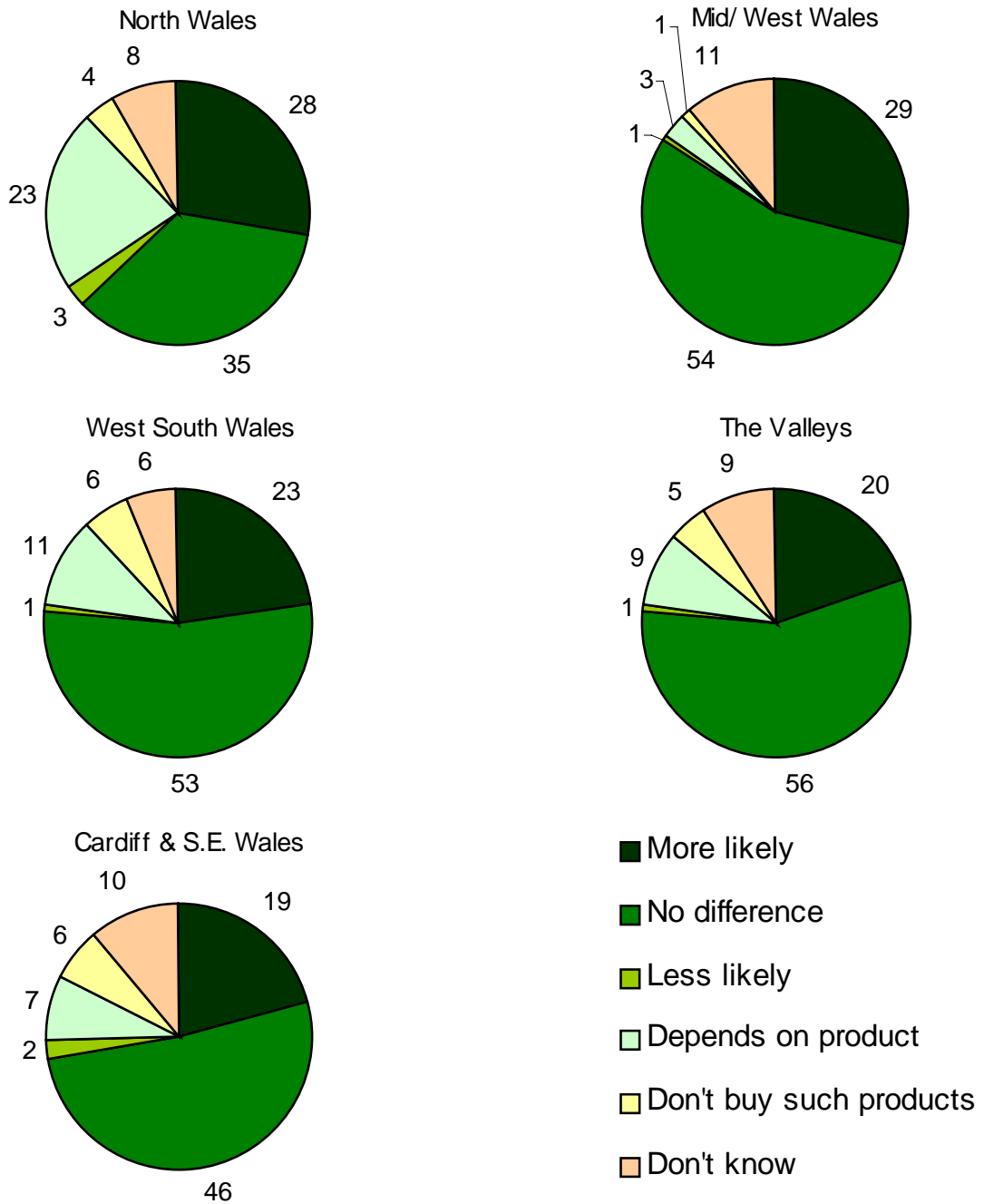
Regional comparisons

There were no significant regional differences for the 'more likely' response.

Respondents from North Wales and Cardiff & South East Wales were more likely than those in other regions to state that if a label indicated that something was produced using wood products from Welsh timber then it would 'depend on the product' whether they would be more or less likely to buy it. They were also less likely to state that it would 'make no difference' (Figure 9).

Respondents from Mid/West Wales were the least likely to say that they 'don't buy such products'.

Figure 9: Likelihood of buying wood product if made of Welsh timber by region



Base: All respondents (1,001)

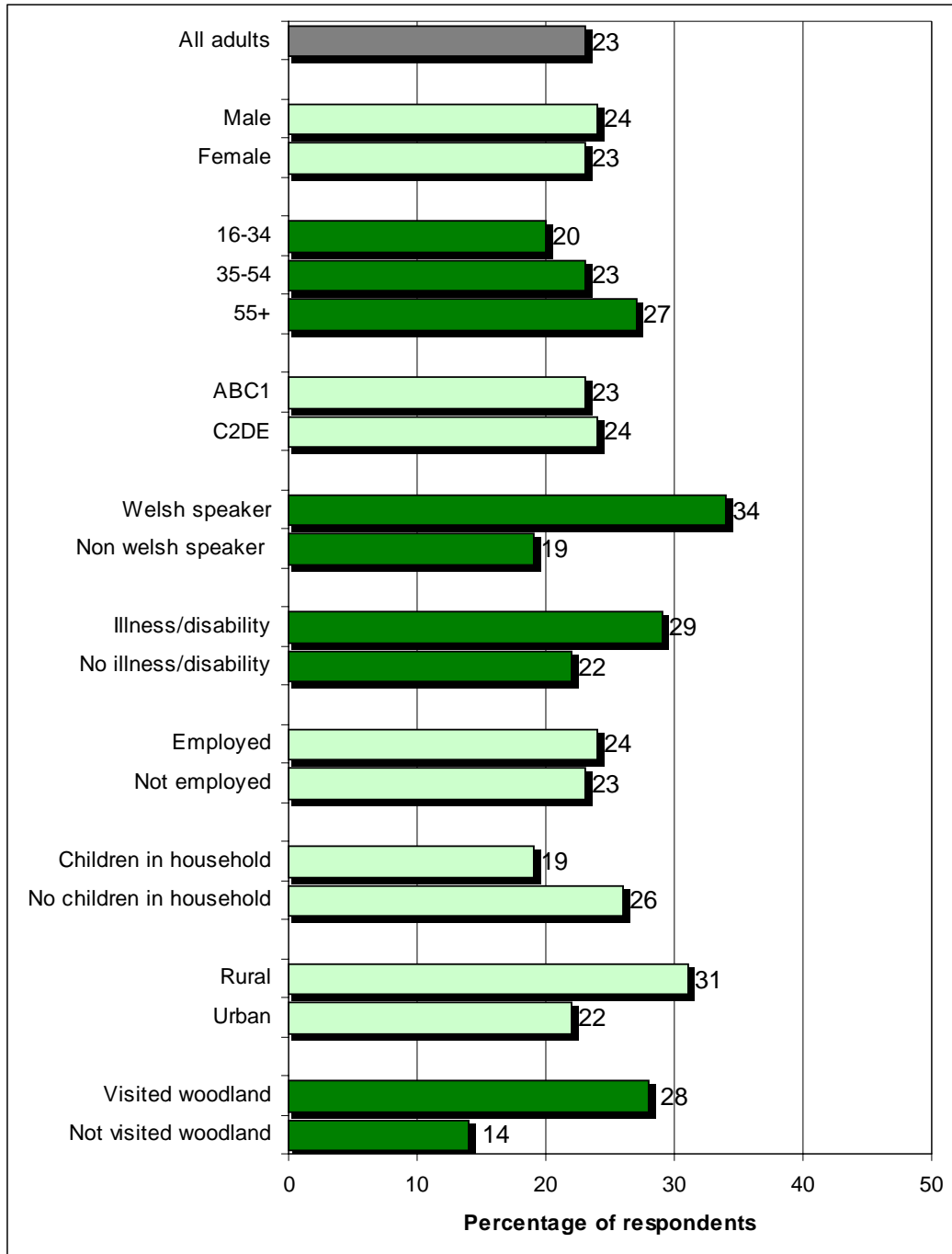
Socio-demographic comparisons

Figure 10 shows the proportion of respondents who were more likely to buy a product made of Welsh timber than a similar wood product. Older respondents, Welsh speakers, those with a long-term illness or disability and those who had visited forests and woodlands recently were more likely to buy a wood product if it was known that it was made from Welsh timber.

Older respondents and those without a long-term illness or disability were more likely to state that their choice would depend on the product (15% compared with 8% of those with a long-term illness or disability). This was also true for those in social grades ABC1 (17% ABC1 compared with 11% C2DE), and those living in urban areas (14% urban compared with 7% rural).

Respondents who were not in employment and younger respondents were more likely to state that they didn't buy such products.

Figure 10: Proportion of respondents more likely to buy a product made of Welsh timber than a similar wood product, by socio-demographic variables (%)



Base: All respondents (1,001)

NOTE: Dark green indicates statistically significant variable in multivariate model

5.3 Wood as a fuel

In the 2005 survey, 11% of respondents said that they used wood as a fuel in their home, either on its own, or with other fuels. This question was not asked in the GB survey or previous public opinion surveys in Wales. However, the question was asked in a separate GB firewood survey in 1997, which found that 9% of those in GB and 17% of those in Wales used wood as a fuel in their home.

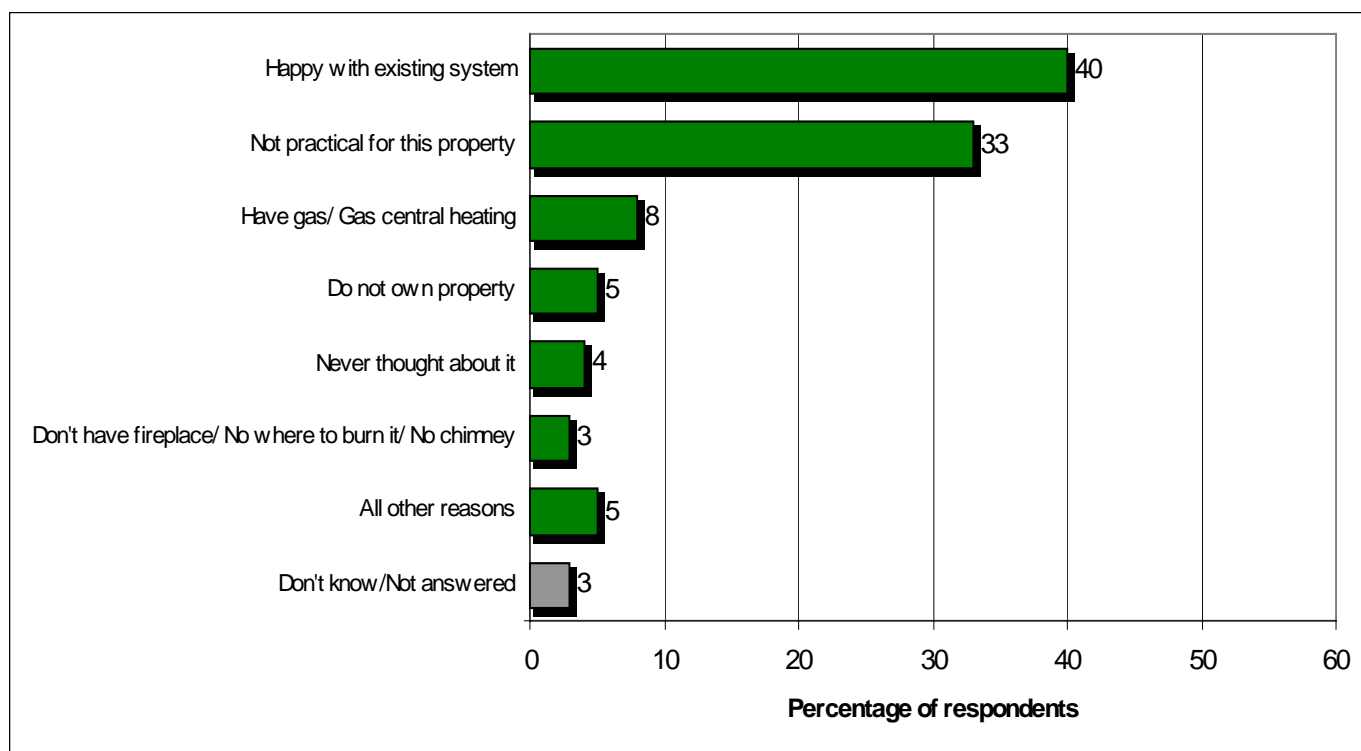
Table 10: Proportion of respondents who use wood as a fuel in their home, by region (%)

	North Wales	Mid/ West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales
Respondents who use wood as a fuel	24	12	10	2	7	11

Base: All respondents (1,001)

Of the respondents who did not use wood as a fuel, the main reasons given were that respondents were either 'happy with existing system' (40%), or that it was 'not practical for this property' (33%). 4% of respondents said that they had 'never thought about it' (Figure 11).

Figure 11: Main reason for not using wood as a fuel in your home



Base: All respondents who did not use wood as a fuel in their home (888)

Regional comparisons

Respondents from North Wales were more likely to use wood as a fuel in their home, either on its own or with other fuels (Table 10).

Of the respondents who did not use wood as a fuel in their home, those from The Valleys (53%), West South Wales (52%), North Wales (37%) and Mid/West Wales (32%) were all more likely to state that their main reason for not using wood as a fuel, either on its own or with other fuels was because they were 'happy with their existing system'.

Respondents from West South Wales were more likely to say that the main reason they did not use wood as a fuel was because they 'do not own the property' (9%), and less likely to say that it was 'not practical for this property' (19%) or that they had 'never thought about it' (1%).

Those from The Valleys and North Wales were less likely to say that the main reason for not using wood as a fuel was that they already had 'gas/central heating system'.

Those from Cardiff & South East Wales were more likely to state that they 'don't have a fireplace / nowhere to burn it / no chimney' and that it was 'not practical for this property' than respondents from other regions.

Socio-demographic comparisons

Respondents who had visited forests or woodlands recently and those who lived in rural areas were more likely to use wood as a fuel in their home (e.g. 8% of those living in urban areas compared with 31% of those living in rural areas).

The most frequently stated reason ('happy with existing system') was more likely to be given by older respondents, those with children in their household, those living in urban areas, and those who had not visited forests or woodlands recently. For example, 42% of those living in urban areas said they were happy with their existing system, compared with 22% of those from rural areas.

Older respondents and those who had visited forests and woodlands recently were more likely to state that using wood as a fuel, either on its own or with other fuels, was 'not practical for this property'.

Respondents who were not in employment were more likely to give their main reason as either 'have gas/central heating system' or 'do not own property' and less likely to give 'don't have fireplace / nowhere to burn it / no chimney' than those in employment.

The reason 'have gas/central heating system' was more likely to be given by those in rural locations. Those living in urban locations were more likely than those living in rural locations to say that they had 'never thought about it'.

Younger respondents were more likely than older respondents to state that the main reason they do not use wood as a fuel was because they 'do not own the property'.

6. Woodland recreation

'Woodlands for Wales' states that the Welsh Assembly Government aims to use woodlands to help create a high quality visitor experience as well as to promote health through access to woodlands for all. This section deals with questions relating to recreation in woodlands.

6.1 Access to woodland

Nearly three-fifths of respondents (59%) said that there was a forest or woodland they could get to easily without using a car or other transport (Table 11). This question was not asked in Wales in 2003.

Table 11: Proportion of respondents who can get to a woodland or forest without the use of a car or other transport (%)

	North Wales	Mid/West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales	GB
Accessible woodland	68	57	58	62	51	59	38

Base: All respondents - Wales 2005 (1,001), GB 2005 (4,000)

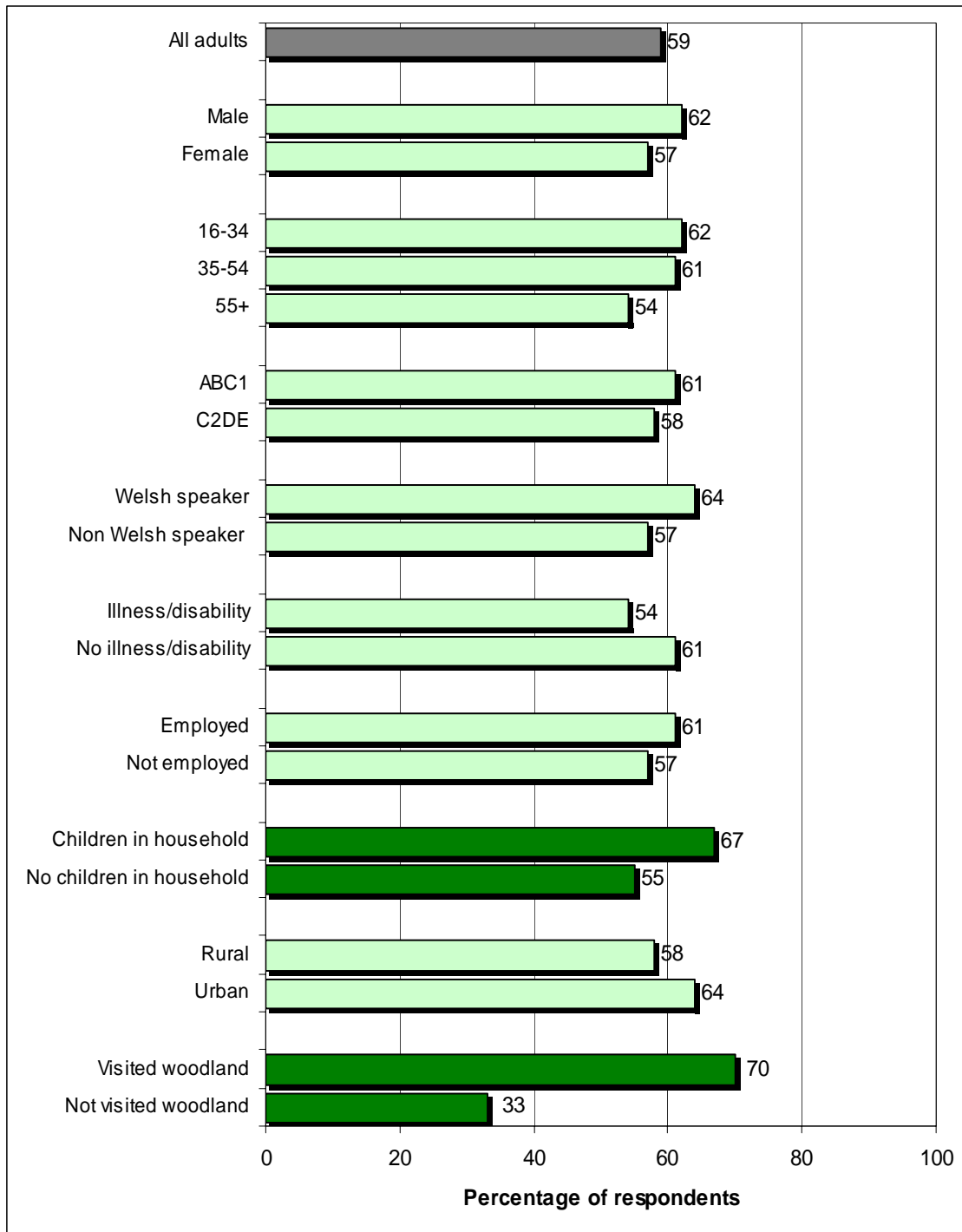
Regional comparisons

Respondents from North Wales (68%) and The Valleys (62%) were both more likely to say that there was a forest or woodland that they could get to easily without using a car or other transport (Table 11).

Socio-demographic comparisons

Those with children in their household (67% with children, 55% without) and those who had visited forests or woodlands recently (70% visitors, 33% non-visitors) were more likely to have forests or woodlands that they could access easily without the use of a car or other transport (Figure 12).

Figure 12: Proportion of respondents who can get to a woodland or forest without the use of a car or other transport, by socio-demographic variables



Base: All respondents (1,001)

NOTE: Dark green indicates statistically significant variable in multivariable model

6.2 Visits to woodland

Over two-thirds (69%) of respondents said that they had visited woodlands for walks, picnics or other recreation in the last few years (Table 12).

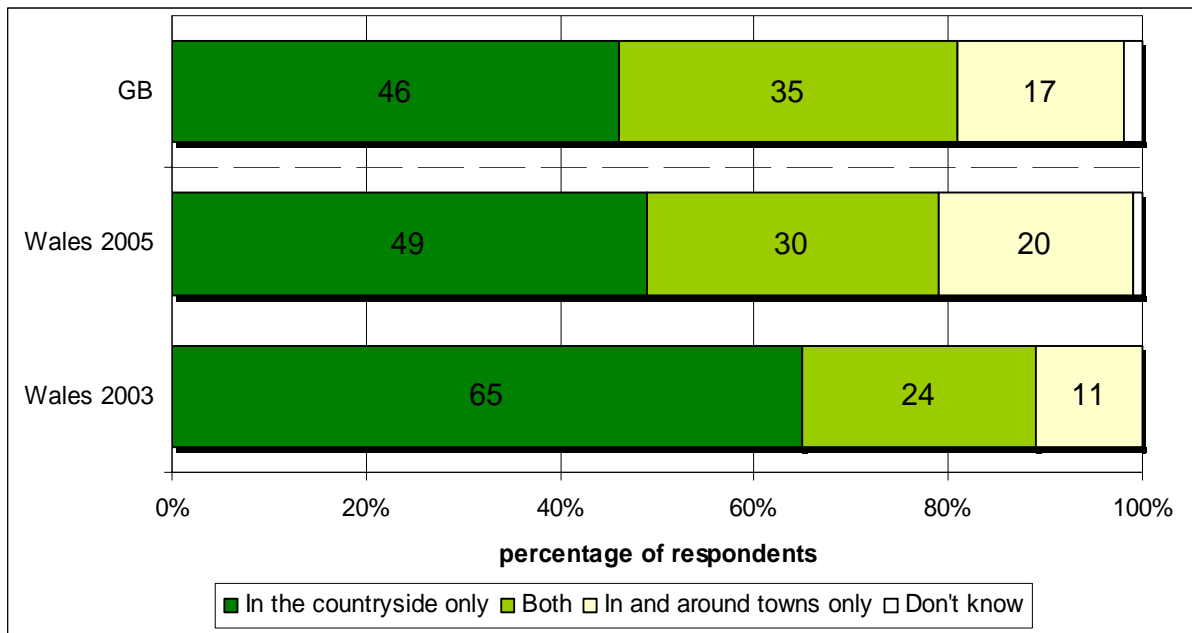
Table 12: Proportion of respondents who had visited woodland in last few years (%)

	Wales		GB
	2005	2003	2005
Visited woodland in last few years	69	62	65

Base: All respondents - Wales 2005 (1,001), Wales 2003 (1,000), GB 2005 (4,000)

Of those respondents who had visited forests or woodlands recently, 49% had only visited woodlands in the countryside, and 20% had only visited woodlands in and around towns. Nearly a third (30%) had visited both rural and urban woodlands (Figure 13).

Figure 13: Type of woodland visited (urban/ rural)



Base: Respondents who have visited woodland in the last few years - Wales 2005 (694), Wales 2003 (620), GB (2,606)

Regional comparisons

Respondents from North Wales (83%), Mid/West Wales (70%) and West South Wales (70%) were more likely to have visited forests or woodlands in the last few years for recreation than those from other regions (Table 13).

Of those respondents who had visited forests and woodlands recently, those from West South Wales were more likely (92%), and those from The Valleys less likely (64%) than respondents from other regions to have visited woodlands in the countryside.

Those from West South Wales (34%) and North Wales (45%) were less likely than those from other regions to have visited woodlands in and around towns.

Table 13: Proportion of respondents who had visited woodland in last few years and type of woodland visited, by region (%)

	North Wales	Mid/West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales
Visited woodland in last few years	83	70	70	59	64	69
Respondents who had visited woodland (%)						
Woodlands in the countryside only	54	45	65	35	43	49
Woodlands in and around towns only	18	23	7	33	22	20
Both	27	31	27	29	35	30
.....						
Don't know	1	-	1	2	1	1

Base: All respondents (1,001) and respondents who have visited woodland in the last few years (694)

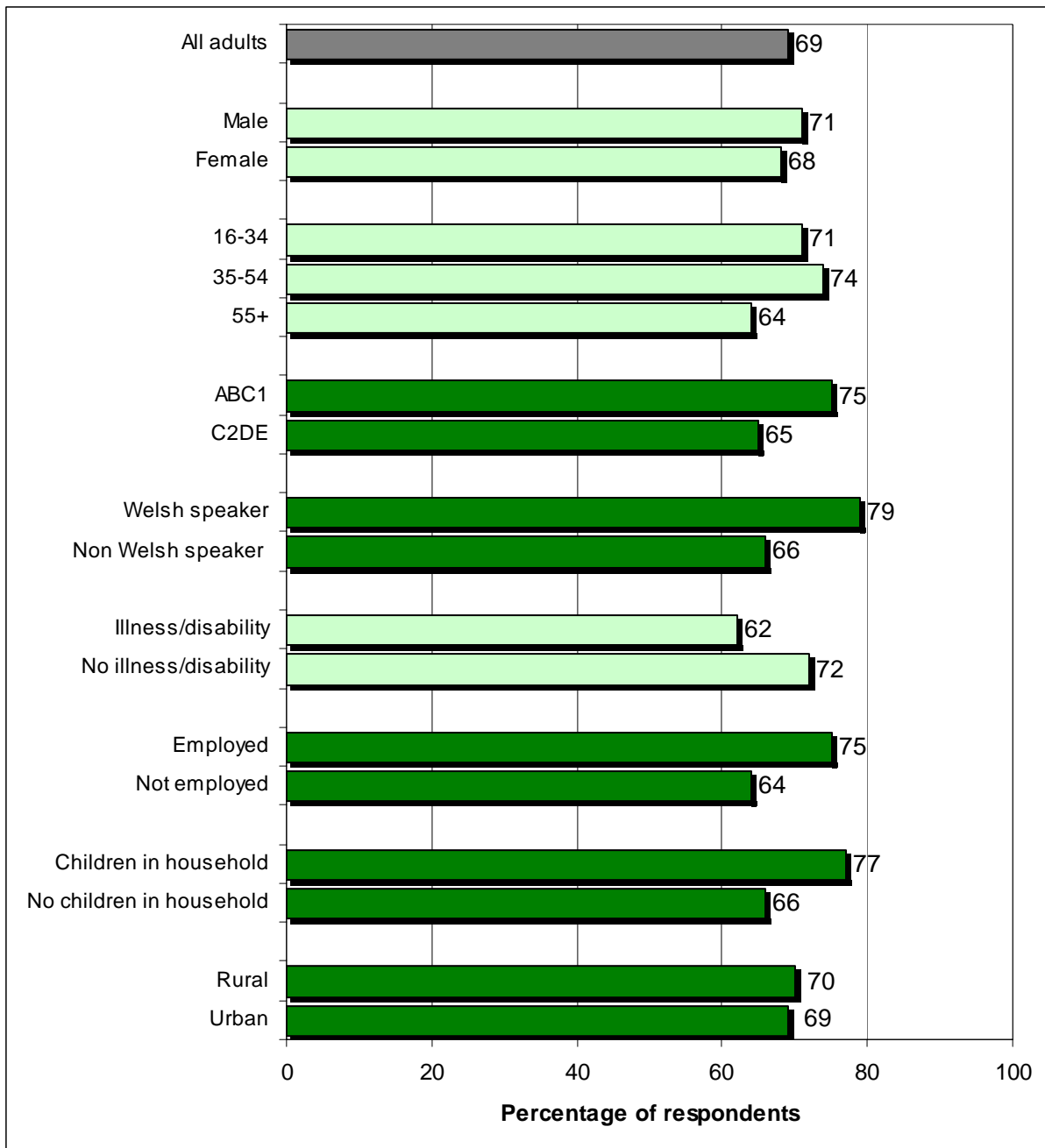
Socio-demographic comparisons

Figure 14 shows that respondents who were in social grades ABC1, those who had children in their household, and those in employment were all more likely to have visited forests and woodlands recently. This is also true for Welsh speaking respondents and those from urban areas.

Of those who had visited woodlands, respondents from urban areas were more likely to have visited woodlands in the countryside (80% urban, 71% rural), and those with children in their household were more likely to have visited woodlands in and around towns (55% with children, 49% without).

Welsh speaking respondents were more likely to have visited woodlands in the countryside (85% of Welsh speakers, 76% of non-Welsh speakers), and less likely to have visited woodlands in and around towns (43% of Welsh speakers, 54% of non-Welsh speakers).

Figure 14: Proportion of respondents who had visited woodland in the last few years, by socio-demographic variables



Base: All respondents (1,001)

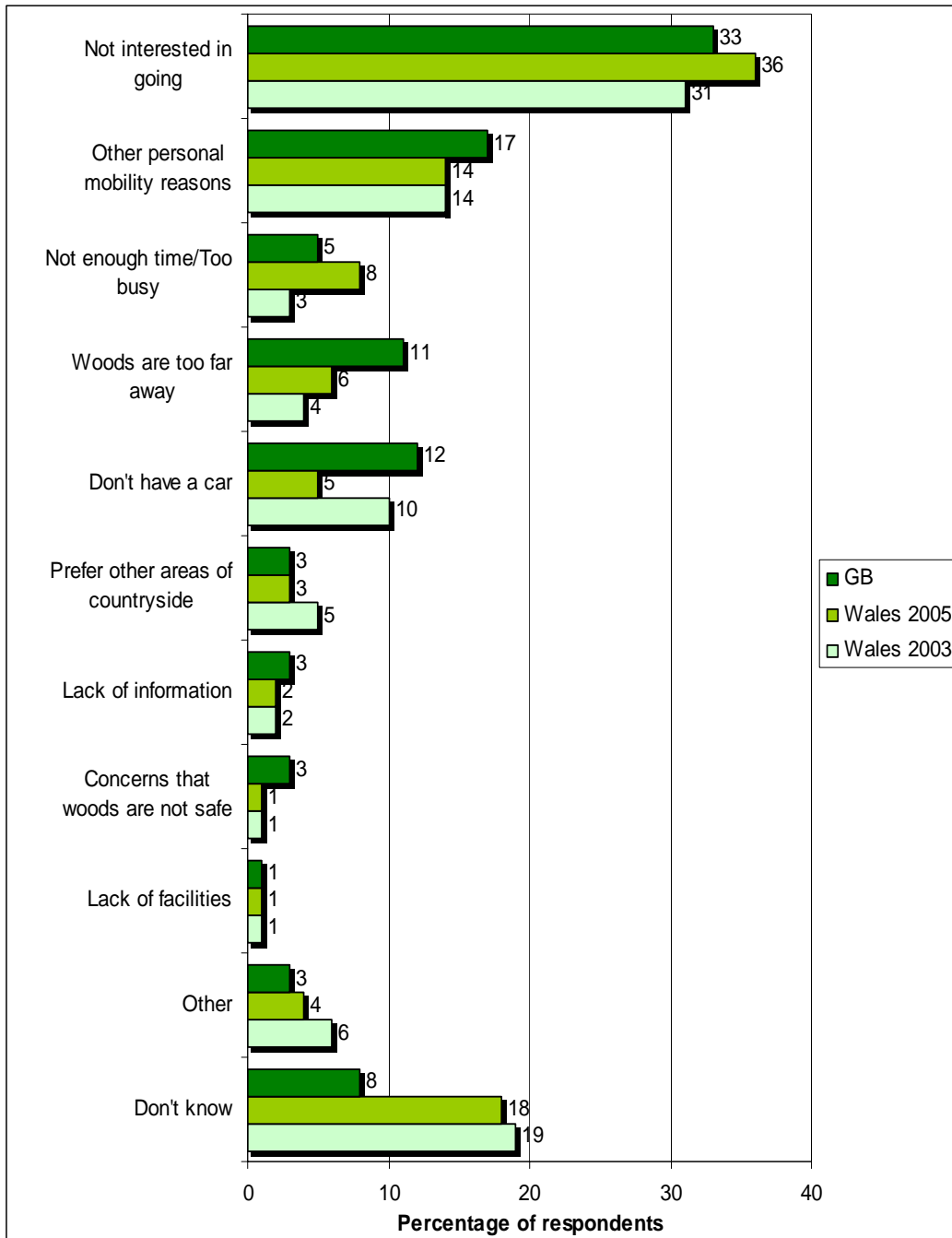
NOTE: Dark green indicates statistically significant variable in multivariate model

6.3 Reasons for not visiting woodland

The main reasons for not visiting a forest or woodland were that the respondent was 'not interested in going' (36% of those who had not visited), 'other personal mobility reasons' (14%), they did 'not have enough time / too busy' (8%), the 'woods were too far away' (6%) or the 'lack of a car' (5%) (Figure 15).

18% were unable to provide a specific reason for not visiting woodland.

Figure 15: Main reason for not visiting forest/woodland in last few years



Base: Respondents who have not visited woodland in the last few years, Wales 2005 (308) Wales 2003 (380), GB (1,328)

Regional comparisons

Table 14 shows the regional variations in the top five reasons given for not visiting woodlands in the last few years. The most frequent response, that the respondent was 'not interested in going', was more likely to be given as a reason by those living in Cardiff & South East Wales.

Those from Cardiff & South East Wales (9%) were less likely to state that the main reason they have not visited forests or woodland recently was due to 'other personal mobility reasons' and respondents from North Wales (9%), West South Wales (9%) and Mid/West Wales (6%) were more likely to say that they 'do not have a car'.

There were no significant regional variations in the proportion of respondents stating that their main reason for not visiting forest or woodlands recently was due to them having 'not enough time/too busy' or the woods being 'too far away'.

Table 14: Top five main reasons given for not visiting woodlands, by region (%)

	North Wales	Mid/ West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales	Wales
Not interested in going	14	37	34	27	55	36
Other personal mobility reasons	21	9	17	19	9	14
Not enough time/Too busy	5	9	12	5	9	8
Woods too far away	7	2	6	8	5	6
Don't have a car	9	6	9	1	3	5

Base: Respondents who have not visited forests or woodland in last few years (308)

Socio-demographic comparisons

Those with a long-term illness or disability were less likely to state that their main reason for not visiting forests or woodlands recently was due to them being 'not interested in going' (26% of those with a long-term illness, 42% of those without), but were more likely to state that it was due to 'other personal mobility reasons' (37% with a long-term illness, 4% without).

Older respondents were more likely to state that the main reason that they did not visit forests or woodlands recently was due to 'other personal mobility reasons' (0% aged 16-34 years olds, 9% aged 35-54 years old and 28% aged over 55 years old).

Those aged 35-54 years old, those with children in their household and those in employment were all more likely to state that the main reason for not visiting forests or woodlands recently was 'not enough time / too busy'. For example, 12% of those in employment said they had 'not enough time/too busy' compared with 5% of those not in employment.

Females and those living in urban areas were more likely to say that the main reason for not visiting forests or woodlands was because they 'don't have a car'.

6.3 Reasons for choosing to visit a woodland

Respondents were asked to identify (from a list) the factors that are important to them when choosing to visit woodland. Peace and quiet (56%), attractive scenery (54%), wildlife (47%), it is in close/ easy reach (43%), and a good place to unwind and de-stress (41%) were the most frequently stated factors (Table 15).

Woodlands being 'in close/easy reach' was the least important factor in the GB survey as a whole but the fourth most important factor in the Welsh survey.

Table 15: Factors important when choosing to visit woodland (%)

	Wales		GB
	2005	2003*	2005
Peace and quiet	56	58	61
Attractive scenery	54	59	58
Wildlife	47	47	64
It is in close/easy reach	43	48	33
A good place to unwind/de-stress	41	40	38
Good for exercise	40	34	41
Safe environment	40	45	53
Knowing that visitors are welcome	34	40	46
No entrance charge	30	31	41
None	5	1	3

Base: Respondents interested in visiting woodland: Wales 2005 (889), Wales 2003 (880), GB (3,363)

NOTE: Respondents could select more than one option

*In the Wales 2003 survey, percentages are shown as a proportion of all respondents (1,000)

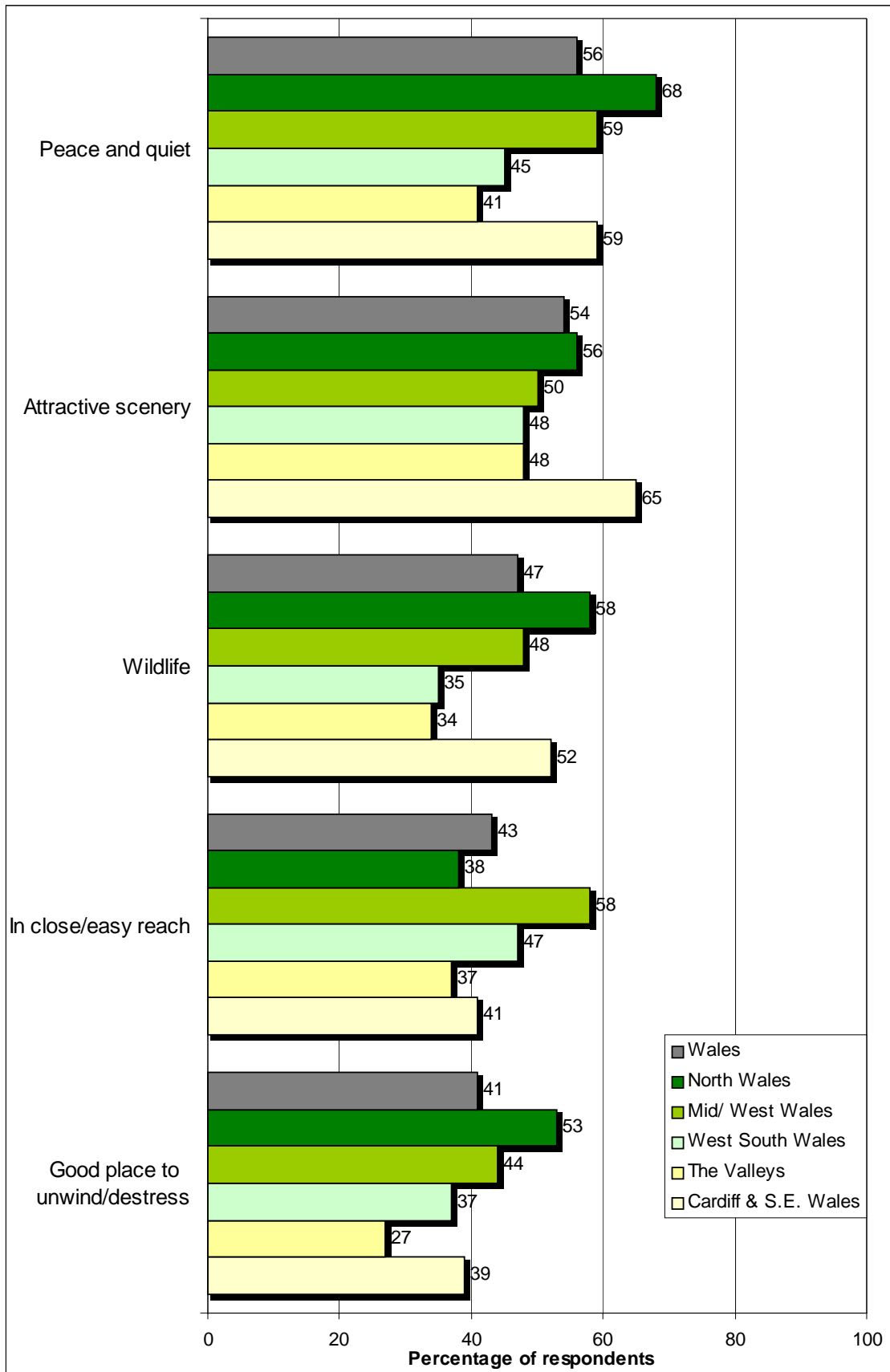
Regional comparisons

Figure 16 shows the top five most important reasons for choosing to visit woodland. Respondents from The Valleys and West South Wales were less likely than other regions to say that 'peace and quiet' and 'wildlife' were important when choosing to visit a woodland.

Respondents from Cardiff & South East Wales were more likely to say 'attractive scenery' was an important factor and those from Mid/West Wales felt that the woodlands being 'in close/easy reach' was an important factor in choosing to visit a forest or woodland.

Woodland being a 'good place to unwind/de-stress' was considered to be more important by respondents from North Wales (53%) and less important by respondents from The Valleys (27%).

Figure 16: Five most frequently stated factors that are important when choosing to visit woodland, by region



Base: All respondents who are interested in visiting woodlands (889)

NOTE: Respondents could select more than one option

Socio-demographic comparisons

Again, considering only the top five factors important in choosing to visit a woodland, those with a long-term illness or disability were more likely to say that 'wildlife', 'peace and quiet' and 'a good place to unwind/de-stress' were important factors. For example, 63% of those with a long-term illness or disability and 53% of those without said that 'peace and quiet' was an important factor.

Respondents in social grades ABC1 were more likely to say that 'attractive scenery', 'wildlife' and 'a good place to unwind/de-stress' were important factors. Those in employment were more likely to consider 'attractive scenery', 'a good place to unwind/de-stress' and 'peace and quiet' and less likely to consider 'it is in close/easy reach' important factors.

Those who had visited forests and woodlands recently were more likely to consider each of the top 5 reasons as important factors. For example, 52% of those who had visited forests recently, and 24% of those who had not, said 'wildlife' was an important factor.

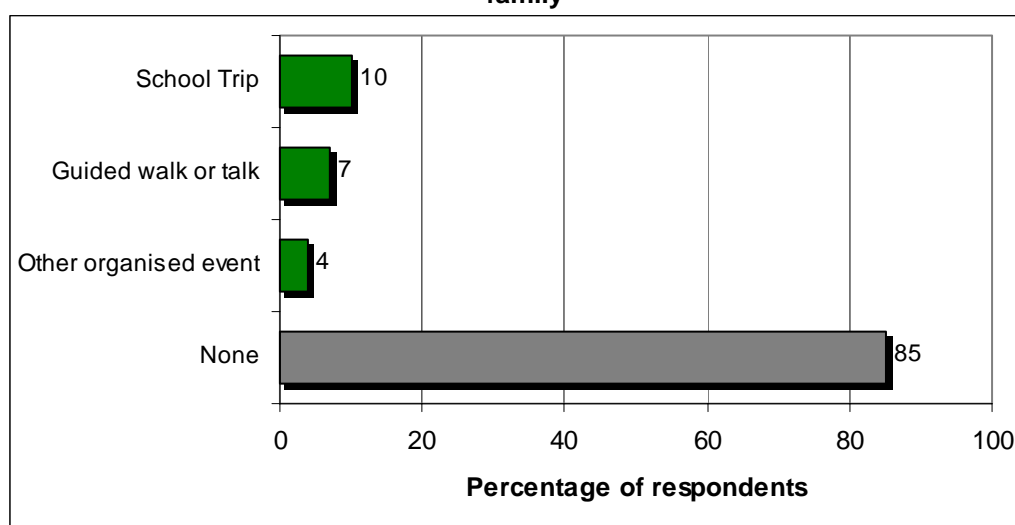
Younger respondents (52% of those aged 16-34 years old, 56% of those aged 35-54 years old, and 55% of those aged over 55 years old) and males (51% of males, 58% of females) were less likely to consider 'attractive scenery' important.

6.4 Woodland learning activities

New to the 2005 survey, respondents were asked whether they or any member of their family had attended any organised learning activities or events to do with the woodlands in the last 12 months.

10% had attended a school trip, 7% a guided walk or talk, and 4% had attended some other event (Figure 17). However the majority (85%) of respondents said that neither they nor a member of their family had attended any such event.

Figure 17: Woodland learning activities attended by respondents or members of their family



Base: All respondents (1,001)

NOTE: Respondents could select more than one option.

Regional comparisons

Table 16 shows that respondents (or their family members) from North Wales and West South Wales were more likely have attended a school trip to a forest. Those from North Wales were also more likely to have attended a guided walk or talk, or some other organised learning activity than respondents from other regions.

Respondents (or their family members) from North Wales were most likely to have attended at least one learning activity to do with woodlands in the last 12 months, while those in The Valleys were most likely to have attended no learning activities.

Table 16: Woodland learning activities attended, by region (%)

	North Wales	Mid/ West Wales	West South Wales	The Valleys	Cardiff & S.E. Wales
School trip	21	5	12	2	9
Guided walk or talk	12	6	6	3	8
Other organised event	7	3	4	1	3
None	73	90	85	95	87

Base: All respondents (1,001)

Socio-demographic comparisons

Respondents who had visited forests and woodlands recently and those with children were the most likely to have attended any learning activity in the last 12 months.

Looking at each activity separately, woodland visitors and respondents with children were more likely to have been on a school trip (either personally or some other member of their family). Woodland visitors were more likely to have been on a guided walk or talk, and also more likely to have been on some other organised learning event. For example, 10% of those who had visited a woodland recently had attended a guided walk or talk (either personally or some other member of their family), compared with 1% of those who had not visited a woodland recently.

Appendix 1: GB survey - results for respondents from Wales

This appendix gives results for Wales and GB as a whole, for questions that were asked in the GB survey but not in the Wales survey. Only 258 interviews were carried out in Wales so these results should be treated with caution.

Forests, woodlands and trees in the media

Which of these promotions have you heard of?

	Wales	GB
'Wood for Good' or other promotions for timber uses and products	4	4
Autumn Colours	3	4
Active woods 'Naturally good for you'	5	3
Forest Education Initiative	9	8
Forest Schools	6	5
At least one	18	17

Base: All respondents Wales (258), GB (4,000)

Forest management

In Britain, public money is given to support forestry, the planting and management of all types and sizes of forests and woods, because it is believed to be of public benefit. From this list, please tell me which of the following reasons are good reasons to support forestry in this way?

	Wales	GB
To provide places for wildlife to live	69	67
To provide places to walk in	62	57
To improve the countryside landscape	54	53
To help prevent the 'greenhouse effect' and global warming	51	55
To provide healthy places for physical activity, relaxation and stress relief	47	44
To provide places to cycle or ride horses	46	35
To support the economy in rural areas	39	41
To help rural tourism	39	36
To create pleasant settings for new developments around towns	37	37
To restore former industrial land	37	30
To make woods more accessible to all in the community	36	36
So Britain can buy less wood products from abroad	32	30
To provide wood as a renewable fuel	27	28
To provide timber for sawmills and wood processing	21	23
At least one reason given	90	89

Base: All respondents Wales (258), GB (4,000)

On a scale from 1 to 5, where 1 is very good and 5 is very poor, how good do you think British forestry is at...

		1	2	3	4	5	Don't Know
Providing opportunities for walking	Wales	23	27	23	6	1	19
	GB	16	30	29	8	2	16
Protecting the environment	Wales	16	23	30	7	4	20
	GB	12	23	33	10	4	18
Providing Britain's timber, board and paper needs	Wales	8	14	23	10	4	41
	GB	6	14	30	11	5	35
Providing homes for birds and other animals	Wales	27	26	18	6	2	20
	GB	18	28	27	9	3	16
Supporting the economy in rural areas	Wales	11	14	30	10	2	32
	GB	7	16	33	11	4	29

Base: All respondents - Wales (258), GB (4,000)

And on the same scale, how would you rate the overall performance of British forestry?

		1	2	3	4	5	Don't Know
Overall performance	Wales	5	27	37	7	2	22
	GB	6	23	40	7	2	22

Base: All respondents - Wales (258), GB (4,000)

Changes to woodland

In the last 20 years, do you think the amount of woodland in Britain has been increasing or decreasing?

	Wales	GB
Increasing	11	15
Decreasing	67	60
Staying about the same	10	13
Don't know	12	12

Base: All respondents - Wales (258), GB (4,000)

Forestry Commission and other organisations

Which of these agencies have you heard of?

	Wales	GB
Countryside Agency	40	33
English Nature	22	31
Forestry Commission	71	61
Forest Enterprise	14	10
Forest Research	12	10
National Trust	82	80
Woodland Trust	55	51
National Forest	33	33
Community Forests	14	12
Tree Wardens	22	20
Environment Agency	67	61
None	3	6
Don't Know	2	2

Base: All respondents - Wales (258), GB (4,000)

Thinking about the Forestry Commission, do you think that it is

	Wales	GB
A government department or agency	62	60
An independent body	18	24
A body representing private woodland owners	5	3
A private company	3	2
Don't know	11	11

Base: Respondents who were aware of the Forestry Commission - Wales (182), GB (2,455)

And which part or parts of Britain do you think that it works in?

	Wales	GB
England	64	79
Scotland	53	61
Wales	79	60
Don't know	12	9

Base: Respondents who had heard of the Forestry Commission - Wales (182), GB (2,455)

Do you think the Forestry Commission

	Wales	GB
Lets the public walk in its woods and forests	90	89
Improves woodland habitats for wildlife	88	88
Provides trails for cycling and horse-riding	83	82
Carries out scientific studies	76	78
Sells Christmas trees	76	59
Runs cabins and campsites for forest holidays	43	47
Gives grants to private woodland owners	26	38

Base: Respondents who had heard of the Forestry Commission - Wales (182), GB (2,455)

On a scale of 1 to 5, where 1 is very good and 5 is very poor, how would you rate the Forestry Commission's overall performance in...

		1	2	3	4	5	Don't know
Managing and protecting FC woodlands	Wales	16	35	20	3	1	26
	GB	17	37	28	3	1	14
Encouraging other landowners to protect and expand Britain's woodlands	Wales	7	21	25	3	2	42
	GB	8	24	34	6	1	26

Base: Respondents who had heard of the Forestry Commission - Wales (182), GB (2,455)

Woodland recreation

**How frequently did you visit forests and woodlands last summer, i.e. between April and September 2004?
..... and how often last winter, i.e. since October 2004?**

Summer			Winter	
Wales	GB		GB	Wales
20	9	Several times per week	5	14
27	22	Several times per month	8	12
25	29	About once per month	15	15
22	32	Less often	34	36
4	7	Never	37	23
1	2	Don't know	1	1

Base: All respondents excluding those who have not visited woodland in the last few years - Wales (179), GB (2,672)

Which of these types of woodland owners do you think owns any of the forests or woodlands you have visited in the last few years?

	Wales	GB
Local Authorities	29	30
National Trust/ National Trust for Scotland	26	40
Woodland Trust	14	17
Other voluntary bodies	*	3
<hr/>		
Total: Any voluntary bodies	34	49
<hr/>		
Forestry Commission/ Forest Enterprise	48	36
Private owners	15	18
<hr/>		
None / Don't know	15	17

Base: All respondents excluding those who have not visited woodland in the last few years - Wales (179), GB (2,672)

* Fewer than 0.5%

If you were thinking about visiting forests or woodlands that you had not visited before, which of the following sources of information would you normally use?

	Wales	GB
Ask friends / relatives	24	27
Guide book or map	24	28
Forestry Commission	9	7
Tourist Information Centre	32	34
Internet	21	27
Library or sports centre	8	10
Other	1	2
<hr/>		
No interest in visiting	19	16
None / Don't know	8	5

Base: All respondents - Wales (258), GB (4,000)

If you were going to a woodland for a day out, which of these facilities would you like to see there?

	Wales	GB
Signposted walks suitable for all abilities	42	45
Long walks (min. 2 miles)	27	26
Car park	43	53
Information about the woodland	32	36
Minimum facilities to ensure peace and quiet	23	22
Nature trails	45	47
Cycle trails	27	24
Picnic areas	50	46
Children's play area	40	31
Toilets	57	66
Cafe / restaurant / kiosk	29	34
Shop with gifts and souvenirs	12	14
Accessible forest rangers	16	21
Organised events, education activities or guided walks	26	20
No interest in visiting	12	11
None / Don't know	10	6

Base: All respondents - Wales (258), GB (4,000)

In the last few years, have you gathered any of the following products from forests or woodlands?

	Wales	GB
Items for eating or drinking (such as berries, fungi, nuts, flowers and sap)	15	13
Medicinal and dietary supplements (such as St John's wort, meadowsweet and hawthorn)	1	2
Decorative floral and craft products (such as foliage, branches, stems moss, lichen and weld)	15	13
Items for seasonal, cultural or religious use (such as holly, ivy and hazel wands)	17	9
Nothing/Don't Know	69	73

Base: All respondents excluding those who have not visited woodland in the last few years - Wales (179), GB (2,672)

Appendix 2: Cross-breaks used in analysis

Table 17 details the cross-breaks used in the analysis for Wales. It also shows the proportion of the sample that fall into each category (e.g. for gender, 48% of respondents were male and 52% were female). For gender, age and MRS social grades, this represents the true distribution of the Welsh adult population (see Appendix 4).

Table 17: Variables used in regression analysis

Variable	Divisions	Distribution of sample	Distribution of 16+ Welsh popn in 2001 Census ⁴	Details (where necessary)
Geographic region	North Wales	23%	23%	Anglesey, Conwy, Denbighshire, Flintshire, Gwynedd, Wrexham.
	Mid/ West Wales	17%	17%	Ceredigion, Carmarthenshire, Pembrokeshire, Powys
	West South Wales	17%	17%	Bridgend, Neath & Port Talbot, Swansea
	The Valleys	18%	18%	Blaenau Gwent, Caerphilly, Merthyr, Rhondda Cynon Taff
	Cardiff & SE Wales	25%	25%	Cardiff, Monmouthshire, Newport, Torfaen, Vale of Glamorgan
Gender	Male (1) Female (2)	48% 52%	48% 52%	
Age	16-34 (1) 35-54 (2) 55+ (3)	29% 35% 36%	29% 35% 36%	Adults 16 and over were divided into 3 age classes
MRS social grades	ABC1 (1) C2DE (2)	46% 54%	47% 53%	ABC1: the chief income earner is a non-manual worker. C2DE the chief income earner is a manual worker or is unemployed ⁵
Long-term illness or disability	Yes (1) No (2)	26% 74%	23% 77%	From question in survey
Work status	Employed (1) Not working (2)	49% 51%	49% 51%	Not working includes students, retired adults and unemployed
Children in household	Yes (1) No (2)	32% 67%	-	Children under 16 in household
Welsh speaker	Yes (1) No (2)	28% 72%	21% 79%	From question in survey
Visited woodland	Yes No	70% 30%	-	From question in survey
Urban / rural	Urban (1) Rural (2)	87% 13%	87% 13%	Based on ONS Rural/Urban Classification 2004 ⁶

Note: To aid in interpreting Table 18, the values used for each of the variables are detailed in italics.

⁴ Welsh adult population (16 years +) 2,316,000.

⁵ MRS social grades are defined by the working status and income of the chief income earner in the household.

⁶ See website <http://www.statistics.gov.uk/geography/nrudp.asp>

Appendix 3: Correlation matrix of variables used in analysis

Table 18 details the correlation between the socio-demographic variables used in the regression modelling. The greater the magnitude of the correlation coefficient, the more highly correlated the variables are.

More highly correlated pairs of variables include: gender with children in household; long-term illness or disability with age, work status and children in household; social grade with work status, long-term illness or disability; and welsh speaker with urban/rural.

Table 18: Correlation coefficients of variables used in regression analysis

	Gender	Age	MRS social grade	Long-term illness or disability	Children in household	Welsh speaker	Urban/Rural	Work Status
Gender	1.00	0.04	0.00	0.00	-0.14	0.00	-0.01	0.02
Age		1.00	0.01	-0.30	0.42	-0.01	0.01	0.28
MRS social grade			1.00	-0.17	-0.05	0.08	0.00	0.15
Long-term illness or disability				1.00	-0.18	-0.02	0.02	-0.31
Children in household					1.00	-0.02	-0.01	0.16
Welsh speaker						1.00	-0.25	0.01
Urban/Rural							1.00	-0.06
Work status								1.00

Furthermore, Table 19 shows that there is also a much higher, positive correlation between respondents from North Wales and the proportion of Welsh speakers and a more negative correlation between respondents from The Valleys, and Cardiff and South East Wales and the proportion of Welsh speakers.

Table 19: Correlation coefficients of Welsh speakers against region

	North Wales	Mid/West Wales	West South Wales	The Valleys	Cardiff and S. E. Wales
Welsh speaker	0.28	0.09	-0.05	-0.17	-0.16

Since the regression modelling took into consideration each of the correlations between all of the regression variables listed in Table 18, when simply analysing percentages, consideration should be taken regarding the correlation between each of these variables and the effect they may have upon the significance of the results.

Appendix 4: Beaufort Research sampling method

The omnibus sample is designed to be representative of the adult population resident in Wales aged 16 and over. The unit of sampling is the electoral ward and 68 interviewing points throughout Wales are selected with probability proportional to resident population, after stratification within county (unitary authority).

Within each sampling point, interlocking quota controls of age and social class within sex are employed for the selection of respondents.

Quotas are set to reflect the demographic profile of Welsh residents and no more than one person per household is interviewed. A fresh sample is selected for each survey within substantially the same interviewing locations.

Interviews are conducted face to face in the homes of respondents. Beaufort's experienced fieldworkers are used with postal and telephone back-checking in accordance with BS7911.

Fieldwork for the March 2005 survey was conducted over the period 3rd to 10th March. A total of 1001 interviews were completed and analysed.

Beaufort Research

Appendix 5: RSGB Random location sampling method

A unique sampling system has been developed by Taylor Nelson Sofres for its own use. Utilising 1991 UK Census small area statistics and the post code address file, GB south of the Caledonian Canal has been divided into 600 areas of equal population. From these 600 areas a master sampling frame of 300 points has been selected to reflect the country's geographical and socio-economic profile. The areas within each Standard Region were stratified into population density bands, and within band in descending order by percentage of population in socio-economic groups I and II.

To maximise the statistical accuracy of Omnibus sampling, sequential waves of fieldwork are allocated systematically across the sampling frame so as to ensure maximum geographical dispersion. The 300 primary sampling units are allocated to 12 sub-samples of 25 points each; with each sub-sample in itself being a representative drawing from the frame. For each wave of Omnibus fieldwork, a set of sub-samples is selected so as to provide the number of sample points required (typically c. 139 for 2,000 interviews). Across sequential waves of fieldwork all sub-samples are systematically worked, thereby reducing the clustering effects on questionnaires asked for two or more consecutive weeks.

Each primary sampling unit is divided into two geographically distinct segments, each containing, as far as possible, equal populations. The segments comprise aggregations of complete postcode sectors. Within each half (known as the A and B halves) postcode sectors have been sorted by the percentage of the population in socio-economic groups II and I. One postcode sector from each primary sampling unit is selected for each Omnibus, alternating on successive selections between the A and B halves of the primary sampling unit again to reduce clustering effects. For each wave of interviewing each interviewer is supplied with two blocks of 70 addresses drawn from different parts of the sector. Addresses are contacted systematically with three doors being left after each successful interview.

To ensure a balanced sample of adults within effective contacted addresses a quota is set by sex (male, female housewife, female non-housewife); within female housewife, by presence of children and working status; and within men, by working status.

As with all multi-stage sample designs, there are effects on the magnitude of the standard error of estimates that arise from a number of sources. The greatest contributors are caused negatively by the effects of clustering and weighting and positively by the effects of stratification. These are collectively known as 'design effects'. The 'design factor' is used to estimate the ratio of the standard error of these complex sample estimates to that of a simple random sample of the same size. Design factors vary from one variable to another depending on the inter-correlations that exist between that variable and the causes of variation in the size of the standard error. For example social grade tends to be correlated between households in small geographical areas and thus variables that are correlated with social grade (e.g. visits to woodland) will have larger design factors. Such design factors need to be individually calculated from actual data to obtain accurate estimates for any given variable. Common practice is the use of a 'modal' value for application to estimates. For the Omnibus Taylor Nelson Sofres recommend a design factor of 1.5 be applied to the calculation of confidence limits and when testing for significance.

Appendix 6: Wales Questionnaire⁷

<p>Q1.</p>	<p>You may have seen or read about UK (<i>British</i>) forests, woods or trees on the television, radio or in the newspapers. From this list, can you please tell me which of these topics you have seen or read anything about in the last 12 months?</p> <p style="text-align: right;">(Multi choice)</p> <ul style="list-style-type: none"> • Birds and other animals in woodlands • Flowers and other plants in woodlands • Forests and woodlands as places to visit • Community woodlands / new local woodlands • Tree planting • Tree pests and diseases • Wood for fuel / (short rotation coppice) • Loss of ancient or native woodland • Restoration of ancient or native woodland • Creation of new native woodlands • Selling public woodlands • Public rights of access to woodlands • Protests about roads or other developments on woodlands • Labelling/certification of wood products • Timber transport • Using forests and woodlands as a learning or education resource (<i>Wales only</i>) • Forests and woodlands as places for health and well-being (<i>Wales only</i>) • None of these
<p>Q2.</p>	<p>From this list, please tell me which of the following benefits you think that woodlands near you provide for the local community? (<i>Wales only</i>)</p> <p style="text-align: right;">(Multi choice)</p> <ul style="list-style-type: none"> • They support the local economy • They help attract tourists to the area • They provide wood as a renewable fuel • They are accessible to all in the community • They provide places for wildlife to live • They provide places for recreation (e.g. walking, cycling, horse-riding) • They provide places for relaxation and stress relief • They improve the landscape • They create pleasant settings for developments around the community • They give people in the community something on which they can work together • They help reduce air and noise pollution • They can be used by local schools and other educational groups • They are just a benefit knowing they are there • None

⁷ Questionnaire wording differed slightly between Wales and the GB. These differences are detailed in individual questions in italics

<p>Q3.</p>	<p>a. Would you like to have more or less woodland in Wales (<i>this part of the country</i>)?</p> <ul style="list-style-type: none"> • More • Neither more nor less (<i>skip to Q4</i>) • Less (<i>skip to Q4</i>) <p>b. How much more woodland: a little more, half as much again or more than that?</p> <ul style="list-style-type: none"> • A little more • About half as much again • More than that
<p>Q4.</p>	<p>Are you a member of any community groups that are involved in the conservation and/or management of local woodlands? (<i>Wales only</i>)</p> <ul style="list-style-type: none"> • Yes • No
<p>Q5.</p>	<p>a. Have you ever been consulted about plans for creating, managing or using woodlands in your area?</p> <ul style="list-style-type: none"> • Yes • No <p>b. Would you like to be consulted (again) about plans for creating, managing or using woodlands in your area?</p> <ul style="list-style-type: none"> • Yes • No <p>Ask if response to either Q5a or Q5b was 'Yes'</p> <p>c. Do you feel that you have influenced, or would be able to influence, decisions about creating, managing or using woodlands in your area? (<i>Wales only</i>)</p> <ul style="list-style-type: none"> • Yes • No

<p>Q6.</p>	<p>a. Have you been shopping for wood products at all in the last few years?</p> <ul style="list-style-type: none"> • Yes • No <i>(skip to Q7)</i> <p>b. Have you ever seen either of these logos on wood products such as furniture, toys or worktops? [show logos]</p> <ul style="list-style-type: none"> • FSC Yes/No • PEFC Yes/No • None <p>c. If a label indicated that something was produced using wood products from Welsh timber, would you be more or less likely to buy it than another similar product? (Wales only)</p> <ul style="list-style-type: none"> • Tend to be more likely to buy • Would make no difference • Tend to be less likely to buy • Depends on the product • Don't buy any such products
<p>Q7.</p>	<p>a. Do you ever use wood as a fuel in your home, either on its own or with other fuels? (Wales only)</p> <ul style="list-style-type: none"> • Yes <i>(skip to Q8)</i> • No <p>b. What is the main reason that you do not use wood as a fuel in your home? (Wales only)</p> <ul style="list-style-type: none"> • Never thought about it • Happy with existing system • Not practical for this property • Concerned about cost • Concerned about efficiency • Concerned about ease of use • Concerned about environmental issues • Do not own property • Lack of local help/suppliers • Other (please specify)

Info:	I would now like you to think about the two main types of trees - conifers and broadleaves. Conifers are trees that have needles and cones. Most of them are evergreen, like pine, fir and spruce. Broadleaves are trees like oak, birch and ash that have leaves, not needles, and lose them in the winter. (Wales only)
Q8.	<p>If conifer woodlands in your area were to be clear-felled (that is, if the whole wood was felled at once), what would you like to see done with the land afterwards? (Wales only)</p> <ul style="list-style-type: none"> • Replant with one conifer species • Replant with one broadleaved species • Replant with a mixture of conifers • Replant with a mixture of broadleaved species • Replant with a mixture of conifers and broadleaves • Don't replant with trees – make land available for development • Don't replant with trees - but recreate different habitats for wildlife • Don't clear-fell trees • None
Q9.	<p>a. There are alternatives to clear-felling conifer plantations, which involve selectively felling some trees so that there are always trees present. Which of the following is more important to you? (Wales only)</p> <p style="text-align: right;">(Multi choice)</p> <ul style="list-style-type: none"> • A wider range of tree species • A wider range of ages of trees • Trees which are native to Wales • Trees which are not planted but regenerate naturally • A more open woodland with some big trees • A better woodland habitat for wildlife • Leave conifer plantations as they are – don't do anything • Continue to clear-fell plantations – don't change the method • None <p>b. Would you support the planting of new woodlands if they could be shown to reduce the frequency or intensity of flooding? (Wales only)</p> <ul style="list-style-type: none"> • Yes • No
Q10.	<p>Are there any forests or woodlands that you can get to easily without using a car or other transport?</p> <ul style="list-style-type: none"> • Yes • No

<p>Q11.</p>	<p>a. In the last few years, have you visited forests or woodlands for walks, picnics or other recreation?</p> <ul style="list-style-type: none"> • Yes • No <p>If YES ask Q11b then skip to Q12 If NO ask Q11c then go to Q12</p> <p>b. Did you visit woodlands in the countryside or woodlands in and around towns?</p> <ul style="list-style-type: none"> • Woodlands in the countryside • Woodlands in and around towns • Both <p>c. What was the main reason that you did not visit?</p> <ul style="list-style-type: none"> • Not interested in going <i>(skip to Q13)</i> • Don't have a car • Lack of suitable public transport • Other personal mobility reasons (difficulty in walking, unwell, etc.) • Woods are too far away • Lack of facilities (play areas, picnic areas, etc.) • Lack of information about woods to visit • Prefer other areas of countryside • Concerns that woods are not safe • Other (specify) • No reason
<p>Q12.</p>	<p>And which of the following are important to you when choosing to visit a woodland? (Multi choice)</p> <ul style="list-style-type: none"> • It is in close/ easy reach • Knowing that visitors are welcome there • Attractive scenery • Wildlife • Peace and quiet • A good place to unwind / de-stress • Good for exercise • Safe environment • No entrance charge • None
<p>Q13.</p>	<p>Have you and/or anyone in your family attended any of the following organised learning activities or events to do with woodlands in the last 12 months? <i>(Wales only)</i> (Multi choice)</p> <ul style="list-style-type: none"> • School trip • Guided walk or talk • Other organised event • None
<p>Q14.</p>	<p>Do you have any long-term illness, health problems or disability which limits your daily activities or the work you can do?</p> <ul style="list-style-type: none"> • Yes • No