

**All Forests Visitor Monitoring**

Survey of visitors to Welsh Assembly Government  
woodlands 2004

Forestry Commission Wales

August 2005



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Prepared by:

**TNS**

19 Atholl Crescent  
Edinburgh, EH3 8HQ

Telephone: 0131 656 4000  
Facsimile: 0131 656 4001  
e-mail: [enquiries@tns-global.com](mailto:enquiries@tns-global.com)

GB4874

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# Contents

<b>Executive Summary</b> .....	<b>i</b>
<b>A. Background and methodology</b> .....	<b>1</b>
Background .....	1
Survey approach.....	2
Estimating visitors numbers and weighting.....	8
<b>B. Volume of visitors to WAG woodlands in Wales</b> .....	<b>10</b>
Total visits to WAG woodlands included in survey.....	10
Time of visits.....	14
Total visits to all WAG Woodlands.....	16
<b>C. Visitor and visit characteristics</b> .....	<b>18</b>
Party composition .....	19
Visitor origin .....	22
Visitor profile.....	24
Type of trip.....	26
Overnight visits .....	27
Travel to the forest.....	30
Frequency of visits.....	32
Duration of visit.....	34
Activities undertaken in forest.....	35
Improvements to forest.....	38
Influence of forest .....	40
Expenditure and economic impact.....	41
<b>D. Summary of results by forest district</b> .....	<b>43</b>
<b>E. Appendices</b> .....	<b>44</b>

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# Executive Summary

## Background

- TNS Travel and Tourism were commissioned by Forestry Commission Wales (FCW) in 2003 to undertake surveys and counts across their four forest districts at a total of 38 forest blocks. The key objectives of this survey were as follows:
  - To measure volume of visitors across WAG woodland;
  - To obtain information on visitor profiles.
- Surveying took place from January 2004 to January 2005 with over 1,200 hours of fieldwork undertaken during 285 days. During this period 765 face to face interviews were achieved.

## Estimated visitor numbers

- In each of the four forest districts the forest blocks selected to be included in the survey were chosen as representative of all Welsh Assembly Government (WAG) woodlands in the area in terms of estimated levels of usage and the size of the surrounding population.
  - By applying these categorisations, each forest was placed into one of nine strata. To obtain an estimate of total numbers of visits to all WAG Woodlands in Wales, the average number of visits per access point at forests included within the survey was then applied to other forests in the same strata. As such the following estimates of total numbers of visits to forests in each of the forest districts and across Wales as a whole have been obtained:
-

**Estimates of total visits to all WAG Woodlands 2004**

	<b>Visits</b>
Coed y Mynydd	1,400,000
Coed y Gororau	500,000
Llanymddyfri	1,030,000
Coed y Cymoedd	1,200,000
<b>Total – Wales</b>	<b>4.1m</b>

- It is estimated that around **4.1 million visits** are made to WAG woodland in Wales each year (excluding visits made during major events). In addition, FCW estimate that around 200,000 visits were made to forests by spectators and participants during events which took place in 2004. Taking this total into account increases the estimate of total annual visits to around 4.3 million.

**Visitor and visit characteristics***Profile of visitors*

- The typical party of visitors to WAG woodland contained 2.1 people with around a third of all visits taken by people on their own (37%), 42% taken by couples/ groups of two and 20% taken by groups of 3 or more people.
- Overall, slightly more than half of visitors to forests in Wales were male (56%). In terms of age profile, over two-fifths of all visitors were aged 45 or over (42%) while 15% were aged under 16.
- The vast majority of visitors to forests were white (99%). Amongst those who stated that they were white, just under half were English (46%) while a similar sized proportion were Welsh (45%).
- Just under a tenth of visitors (8%) stated that they or a party member had a disability or special need.
- A fifth of all visitors were on an overnight trip away from home when they visited the forest (19%) while the remainder of visitors were on a short trip/ day trip from home (81%).

- The main areas of origin of visitors who were on an overnight trip away from home when they visited a forest were Wales (21%), North West England (20%) and South East England (20%). Only 1% of tourists visiting forests were from overseas.
- A third of visitors to forests who were on an overnight trip away from home stayed in either a tent, caravan or cabin (33%) while 18% stayed in other self catering accommodation and 18% stayed in the home of a friend or relative. An average of 5.2 nights were spent away from home and an average of 5.0 nights were spent in Wales. Just over half of visitors were on a short break of 1 to 3 nights from home (55%) while the remainder were on longer holidays.
- All respondents were asked to indicate how far they had travelled to reach the forest, either from their home or the holiday accommodation they had used the previous night. Overall, the largest proportions of visitors had travelled the shortest distances with 46% travelling under 6 miles and 22% travelling between 6 and 15 miles. Only 1 in 5 forest visitors travelled more than 25 miles to reach the forest (19%).
- Overall, around a sixth of visitors went to the forest they were interviewed in at least once a day (16%) with 6% stating that they typically visited more than once a day. A further quarter visited 1 to 3 times per week (23%) and 16% visited less often but at least once a month.

#### *Trip profile*

- The majority of visitors to forests travelled to the forest by car (81%). Much smaller proportions used other types of transport with 12% walking to the forest and 3% cycling. Less than 1% of all visitors used public transport to reach the forest.
  - Overall, the average length of visits to forests was around 1 and a half hours (1hr 32 mins). Just over half of visitors spent less than 1 hour (55%), 27% spent between 1 and 2 hours and the remaining 18% spent 2 or more hours.
  - The most popular activities overall were dog walking (40%), other walking (32%) and cycling on waymarked tracks (10%).
-

- When asked what one thing, if anything, could be done to improve the woodland they were visiting, the most frequently provided suggestions related to signposting improvements, improvements to tracks, providing more bins and providing more toilets.

#### *Value of forests*

- All visitors were asked to specify how much money they had personally spent that day and, if they were on an overnight trip, how much they had spent on their accommodation the previous night. Across all respondents (day trippers and visitors on trips away from home), 43% spent nothing while 39% spent less than £20 in total. The average spend per person across all visitors (i.e. including those who spent nothing) was £13.
  - Respondents were also asked to indicate how important the presence of the forest they were visiting and its facilities had been in their decision to come to the area for their day out/ while on holiday. While 1% of all visitors stated that the forest was 'not important at all' and 9% stated that the forest was 'not relevant' because they lived in the local area, larger proportions indicated that the forest was either their 'only reason for coming' (26%) or 'very important' (39%) in their decision to visit the local area.
  - By applying information on average levels of expenditure per person per day to data relating to the influence of forests on decisions to visit, it is possible to estimate total spend by visitors whose decisions to go to visit the area were affected by the presence of a forest to visit. This calculation suggests that approximately **£30 million** was spent by visitors who were influenced to take their visit due to the forest and its facilities. This expenditure was made during the day of the forest visit and included overnight accommodation, food and drink, transport and non-routine shopping.
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## A. Background and methodology

### Background

The Forestry Commission have collected information on the number and profile of visitors to their forests for a number of years. A variety of methodologies have been used including the installation of permanent mechanical counters, people and vehicle counters and, until 2001, a rolling programme of face to face surveys at a core of 'key' forests.

In late 2001 TNS Travel and Tourism were commissioned to pilot a survey method developed by Cheltenham and Gloucester College of Higher Education which aimed to provide more reliable estimates of visitor numbers and activities and an accurate profile of visitors to a wider range of Forestry Commission sites, including those classified as 'non-key' sites. In particular it was hoped that this 'All Forests' method would provide more accurate information on local usage of forests.

The pilot fieldwork was undertaken in the New Forest and Inverness forest districts in two waves, between February and May 2002 and August and September 2002. A total of 1,437 hours of fieldwork were undertaken at 15 forest blocks.

As a result of this pilot a number of fairly minor changes were suggested and made to the fieldwork materials and approaches to fieldwork scheduling. As a whole the methodology was found to achieve its objective of producing accurate and robust data regarding visitor numbers and profiles.

Following the success of the pilot, TNS Travel and Tourism were commissioned by Forestry Commission Wales (FCW) to undertake surveying using this methodology across their 4 forest districts, at a total of 38 forest blocks. The key objectives of this survey were as follows:

- To measure volume of visitors across WAG woodland;
- To obtain information on visitor profiles.

This report provides the results of the survey. Copies of the questionnaire, count sheet and contact sheet are appended.

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## Survey approach

### *Geographical coverage*

Face to face interviews and counting of visitors was undertaken from January 2004 to January 2005 across all four Welsh forest districts:

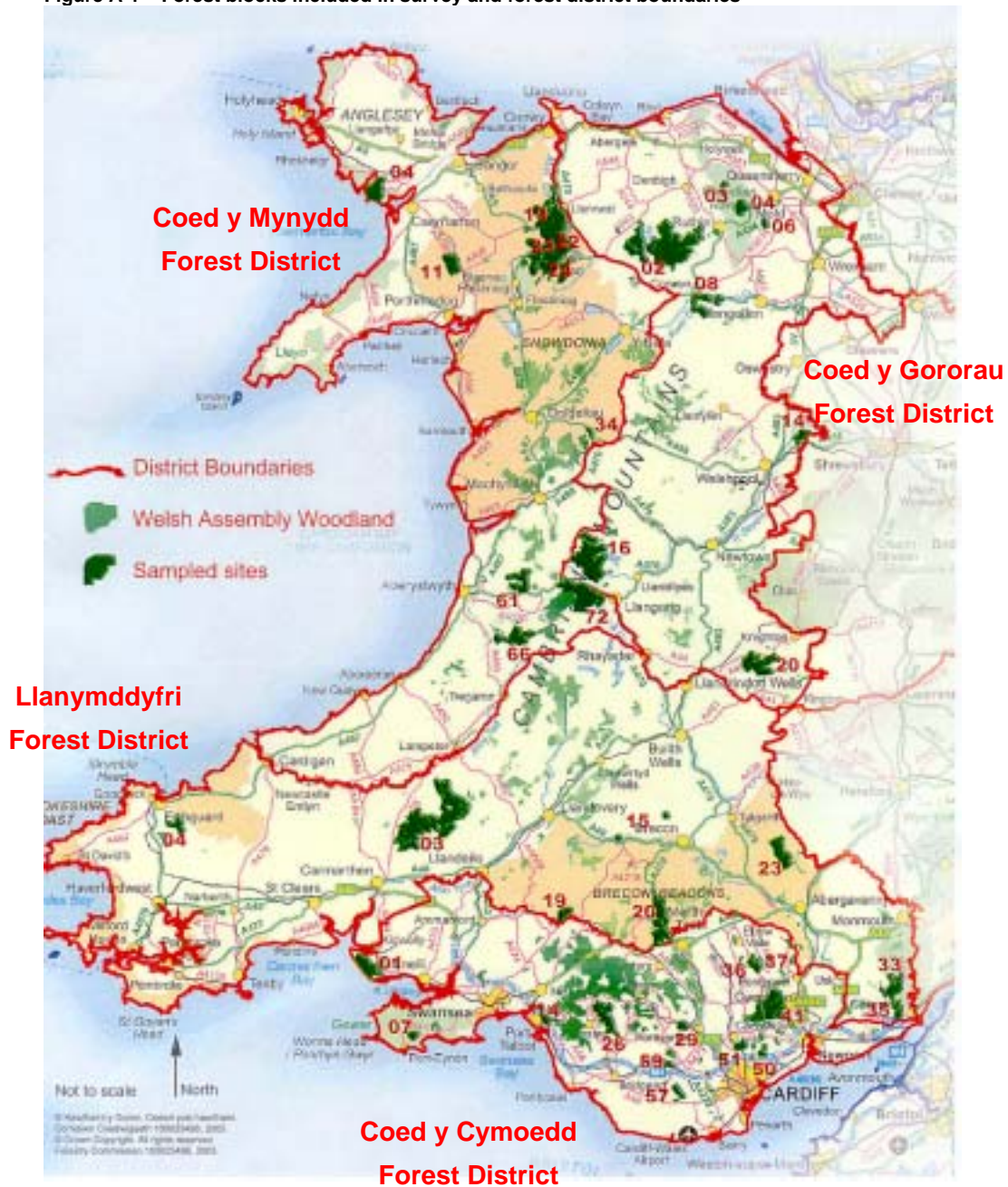
- Coed y Cymoedd – 12 forest blocks;
- Coed y Gororau – 8 forest blocks;
- Coed y Mynydd – 10 forest blocks;
- Llanymddyfri – 8 forest blocks.

The forest blocks included in the survey were selected by FCW as representative of all of the blocks in each of the districts, on the basis of population levels within 15km of the site and perceived levels of visitor usage. At a Wales level, the blocks selected are representative of the range of facilities and activities available in WAG woodlands, but this is not always the case at a district level. Approximately a fifth of Welsh Assembly Government (WAG) woodland was included in the survey.

The map overleaf illustrates the location the forest blocks included in the survey and the forest district boundaries. The forest blocks included in the survey are numbered as follows:

<b><u>Coed y Mynydd</u></b>	<b><u>Coed y Gororau</u></b>
4 Newborough	2 Alwen/Clocaenog
11 Beddgelert	3 Llangwylfan
19 Coed Creigiau	4 Moel Famau
22 Soflen	6 Nercwys
23 Gwydyr North/Central	8 Corwen
24 Gwdyr South	14 Breidden
34 Dinas Mawddwy	16 Hafren
61 Bwlch Nant yr Arian	20 Radnor
66 Ystwyth	<b><u>Coed y Cymoedd</u></b>
72 Tarenig/Myherin	1 Pembrey
<b><u>Llanymddyfri</u></b>	7 Mill Wood
3 Brechfa	14 Mynydd Dinas
4 Trewn	26 Garw
15 Yr Allt/Battle Hill	29 Gelliwion
19 Cwm Giedd	36 Aberbeg
20 Coed Taf	37 Craig Fawr
23 Mynydd Du	41 Cwmcarn
33 Chepstow Park	50 Gwern Ddu/Cefn Mabli
35 St Pierre/Coppice/Barnets	51 Caerphilly Woods
	57 Hensol
	59 Trecastle

Figure A-1 – Forest blocks included in survey and forest district boundaries



Each of the 4 forest districts varies somewhat in terms of the size of forest blocks, proximity to populated areas and facilities provided<sup>1</sup>. The following pages provide a summary of the main characteristics of each of the areas.

<sup>1</sup> A map illustrating a typical forest block and the different types of access point is provided in Appendix 6.

### Coed y Cymoedd Forest District

This district comprises an estate of some 30,000 hectares from the Severn Bridge to the Gwendraeth, primarily encompassing the 'industrial' South Wales Valleys, but also the Gower, Vale of Glamorgan, South Carmarthenshire and the three largest cities of Wales - Cardiff, Swansea and Newport. The estate comprises some 10% of the land area overall, but this masks considerable variations from 2% in the coastal belt to more than 25% in some of the Valley Unitary Authority areas.

The estate ranges from close to sea level to 600m altitude, with the corresponding diversity in woodland conditions arising from considerable variations in soils, exposure, rainfall and terrain. However, some 28,000 hectares is in the Valleys area where there tends to be a broad similarity in physical, environmental and social conditions.

The Valleys Forest is the largest urban forest in Europe, with some 900,000 people living in the Valleys themselves and an additional 700,000 living in the large settlements along the Severn Estuary and the Bristol Channel coast from Newport to Llanelli.

### Coed y Gororau Forest District

Coed y Gororau Forest District comprises over 24,000 hectares from the North Wales coast to Radnorshire in the southern half of Powys. It adjoins the English border to the east for a distance of over 150km, to the west it adjoins Coed y Mynydd Forest District and to the south Llanymddyfri Forest District.

The landscape in the south and west of the Forest District is largely rural in character, ranging from the heath and moorlands of the Berwyn Hills and Plynlimon to the fertile agricultural plains of the River Severn, Welsh Marches and Vale of Clwyd. The Northeast of the Forest District is far more urban and includes Wrexham and the populations of Flintshire and the North Wales coast.

The woodland character varies greatly from the small ancient woodland sites with a strong broadleaf character, to typical upland conifer plantations rising up to over 600 metres in elevation.

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### Coed y Mynydd Forest District

This district comprises an estate of some 40,000 hectares from Ynys Mon in the North to Lampeter in the South, encompassing the entire Snowdonia National Park and the northern coastline of Cardigan Bay. The estate ranges from close to sea level at Newborough and Harlech to 630m altitude at Abergynolwyn, with the corresponding diversity in woodland conditions arising from considerable variations in soils, exposure, rainfall and terrain.

The management of the forest has changed dramatically since the time they were first established. The requirement has changed from one of providing a strategic reserve of timber in times of national emergency to a wide-ranging role as a provider of multi-purpose benefits to society. FCW is in a unique position as the largest single landowner in North Wales to make a significant contribution to the protection and improvement of the environment of the area and also to the prosperity of its people.

Economic activity based around tourism is very important to both the district and communities and businesses. The forest provides a major attraction to tourists both bringing them into the area and also offering activities once there.

### Llanymddyfri Forest District

This district is administered from the market town of Llandovery. The district boundary completely encompasses the Unitary Authorities of Pembrokeshire and the approximate percentages of total area of each of the following:- 65% of Carmarthenshire, 45% of Powys, 25% of Ceredigion, 70% of Monmouthshire, 15% of Rhondda Cynon Taf, 25% of Merthyr Tydful and 15% of Newport. The FD area also includes Pembrokeshire Coast and Brecon Beacons National Parks and the Wye Valley Area of Outstanding Natural Beauty.

Across the district FCW manages over 100 woodlands (36,100 hectares), these vary in size from forests of several thousand hectares such as Brechfa and Tywi to smaller woodlands of under 50 hectares. The type of woodlands are extremely diverse and range from lowland mixed woodlands in the Cleddau Estuary, to Lowland Broadleaf woodland in the Wye Valley, to the extensive upland conifer woodlands of the Cambrian Mountains.

The estate ranges from close to sea level to 600m altitude, with the corresponding diversity in woodland conditions arising from considerable variations in soils, exposure, rainfall and terrain.

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The estate was acquired over 50 years between the 1920s and the 1970s, primarily to develop a strategic timber reserve. Timber production is still important – some 280,000 tonnes produced from the District annually. However, in the last 10 years, much greater emphasis has been given to providing recreational, environmental and social opportunities.

### *Timing of fieldwork*

At each of the blocks included in the surveys interviewing and counting took place at every access point, following the methods outlined in the All Forests Methodology Guidance notes<sup>2</sup>. Essentially, this approach involved a total of 9 one-hour duration fieldwork periods being undertaken at every access point to the sampled forest blocks. These periods were distributed across different days of the week with a target of 3 during weekdays, 3 on Saturdays and 3 on Sundays. In terms of time of day, 5 or 6 of the fieldwork periods were undertaken between 10am and 4pm (mid) while the remaining 3 or 4 were either undertaken before 10am (early) or after 4pm (late).

Fieldwork at each forest block was undertaken fairly evenly across the 12 months to make it possible to take account of seasonal variations in visitor numbers, thereby providing more accurate data to use in the subsequent modelling of annual visitor numbers.

### *Counting*

During each one hour period interviewers counted the total numbers of visitors entering and leaving at each access point in total and according to their method of transport (e.g. bicycle, horse). When working at a car park interviewers also recorded the total number of vehicles parked at the start and end of the counting period. A copy of the count sheet used is appended<sup>3</sup>.

### *Interviews*

Interviewing of visitors was undertaken at each access point throughout the fieldwork period. Respondents were selected randomly to guarantee the representativeness of results and the conduct of interviews ‘on-site’ ensured that responses were immediate with no problems of respondent recall.

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<sup>2</sup> See Appendix 1

<sup>3</sup> See Appendix 4

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The survey took the form of an ‘exit survey’ with respondents interviewed at the end of their visit to each site to ensure that their actual behaviour patterns were recorded rather than their intentions. Visitors were targeted on the basis of the next person to leave on completion of the previous interview. This procedure maximised the number of interviews completed per hour whilst maintaining the random selection of respondents.

In circumstances where a group of people or a family left together, the “next birthday” rule was used to select one respondent per group or family for interview. The “next birthday” rule is a standard market research industry method which is widely used in face to face surveys to ensure that the oldest member of the family or the head of the group cannot self-select himself or herself as the respondent. All members of the group or family aged 16 years or over were eligible for selection, thus ensuring that the principles of random sampling were maintained.

The questionnaire used in the survey is provided in Appendix 2.

#### *Fieldwork achieved*

Over the twelve month survey period over 1,200 hours of fieldwork were undertaken during 285 days. During this period 765 interviews were achieved, an average of 0.6 interviews per hour. Of those people approached, 85% agreed to be interviewed. Reasons for not taking part in an interview included having already been interviewed for the survey and being in a hurry. Around 2,200 visitors were counted leaving the forests during the fieldwork period.

The table below summarises fieldwork achieved in each forest district over the 12 month period.

**Table A-1 – All WAG Woodlands Wales 2004 – Hours of fieldwork and interviews achieved by forest district**

	Coed y Cymoedd	Coed y Gororau	Coed y Mynydd	Llanymddyfri	Total
Days of fieldwork undertaken	72	41	76	96	285
Hours of counting and interviewing	305	218	322	429	1,274
Interviews achieved	233	147	142	243	765
Average interviews per hour	0.8	0.7	0.4	0.6	0.6

### Estimating visitors numbers and weighting

By following the survey approaches described, data on numbers of visits was collected at each forest block over nine available time periods:

<b>Weekdays</b>	<b>Saturdays</b>	<b>Sundays</b>
1) Early (before 10am)	4) Early (before 10am)	7) Early (before 10am)
2) Mid (10am to 4pm)	5) Mid (10am to 4pm)	8) Mid (10am to 4pm)
3) Late (after 4pm)	6) Late (after 4pm)	9) Late (after 4pm)

This data has been used to produce estimates of total numbers of visitors at each forest block by using the following approach:

1) For each of the nine time periods, the total number of hours a forest block was 'available' for a visit was calculated by estimating the number of daylight hours over the whole year (excluding hours before 6.30am when it is assumed that visitor throughput would be negligible):

<b>Weekdays</b>	<b>Saturdays</b>	<b>Sundays</b>
1) Early (before 10am) 764 hours of daylight	4) Early (before 10am) 152 hours of daylight	7) Early (before 10am) 152 hours of daylight
2) Mid (10am to 4pm) 1,572 hours of daylight	5) Mid (10am to 4pm) 312 hours of daylight	8) Mid (10am to 4pm) 312 hours of daylight
3) Late (after 4pm) 784 hours of daylight	6) Late (after 4pm) 158 hours of daylight	9) Late (after 4pm) 158 hours of daylight

2) The actual number of hours of counting undertaken at each access point during each of the nine time periods (typically 3 weekdays/ 3 Saturdays/ 3 Sundays and 5 or 6 mid and 3 or 4 early or late), was then applied to the total 'available' hours to produce a weighting factor.

3) Each of the weighting factors were then applied to the number of counts undertaken during each of the nine time periods to produce an estimate of total visits over the 12 months.

4) By adding together the estimates for each access point an overall estimate of annual visits was obtained for each forest block. These totals have then been applied to other, similar blocks not included in the survey to produce an estimate of visits to all Welsh Assembly Government (WAG) woodland areas throughout each of the four forest districts.

As numbers of visitors both entering and leaving forests was recorded during fieldwork, it has been possible to extrapolate data using each of these measures. The final estimate of visitor numbers has been taken as the average of these two estimates. Details of the confidence intervals associated with the estimates included in this report are provided in Appendix 7.

Throughout this report estimates have been rounded to the nearest 1,000.

In addition to providing estimates of the total volume of visits to WAG woodland, it has been possible to use this data to weight the results of the survey of visitors. All of the results provided in the following sections have been weighted on this basis. Weighted, cross tabulated data tables are provided under a separate cover.

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## B. Volume of visitors to WAG woodlands in Wales

### Total visits to WAG woodlands included in survey

By following the approaches outlined in the previous section it has been possible to obtain estimates of the total number of visits taken to each of the surveyed forest blocks during 2004. Tables B-1 to B-4 provide estimates for each of the forest blocks included in the survey, together with details of the classification<sup>4</sup> provided to each forest and numbers of entrances<sup>5</sup>.

**Table B-1 – Estimated volume of visits to surveyed forests – Coed y Mynydd 2004**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
4. Newborough	H	L	4	0	0	0	4	296,000
61. Bwlch Nant yr Arian	H	L	2	1	0	0	3	45,000
11. Beddgelert	H	M	1	2	0	1	4	37,000
23. Gwydyr North/ Central	H	H	1	1	2	1	5	27,000
34. Dinas Mawddwy	L	M	0	0	1	0	1	17,000
66. Ystwyth	M	L	1	0	1	0	2	5,000
19. Coed Creigiau	L	L	0	0	0	1	1	4,000
24. Gwdyr South	M	L	0	0	3	0	3	4,000
72. Tarenig/ Myherin	L	L	0	1	0	0	1	4,000
22. Soiflen	L	L	0	0	0	1	1	<1,000

In Coed y Mynydd forest district (North West Wales), the estimated number of visits per block during the 12 month survey period ranged from less than 1,000 at Soiflen to around 296,000 at Newborough. The total number of visits at blocks in the Coed y Mynydd area which were included in the survey was 439,000.

<sup>4</sup> In Tables B-1 to B-4, 'usage classification' shows the perceived level of visitor usage and 'population classification' the population level within 15km of the site. Both are classified on a scale of high (H), medium (M) or low (L).

<sup>5</sup> Appendix 5 provides further details of each of the forests included in the survey.

In Coed y Gororau forest district (North East Wales), the largest number of visits were estimated to have taken place at Moel Famau (c.134,000 visits) while around 4,000 visits were estimated to have taken place at Radnor. The total number of visits taken to all of the survey sites in this district was around 368,000.

**Table B-2 – Estimated volume of visits to surveyed forests – Coed y Gororau 2004**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
4. Moel								
Famau	H	H	2	0	2	0	4	134,000
2. Alwen/								
Clocaenog	L	L	4	1	1	0	6	59,000
6. Nercwys	M	H	0	2	0	0	2	50,000
14. Breidden	M	M	1	0	1	0	2	50,000
3. Llangwyfan	H	M	1	0	0	0	1	46,000
16. Hafren	M	L	1	0	2	0	3	19,000
8. Corwen	L	M	0	0	1	1	2	6,000
20. Radnor	M	L	1	0	0	0	1	4,000

In Llanymddyfri forest district (Mid Wales), Coed Taf was estimated to have received around 200,000 visits during 2004 while Trecwn was visited on fewer than 1,000 occasions. Some 329,000 visits were estimated have been taken to all of the Llanymddyfri sites included in the survey.

**Table B-3 – Estimated volume of visits to surveyed forests – Llanymddyfri 2004**

Block	Usage	Population	Official	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)	Car Parks					
20. Coed Taf	H	H	1	4	4	0	9	200,000
35. St Pierre/ Coppice/ Barnets	M	H	3	1	1	0	5	42,000
33. Chepstow Park	H	H	2	1	1	0	4	40,000
3. Brechfa	M	L	4	15	1	0	20	23,000
23. Mynydd Du	H	H	1	2	0	0	3	21,000
19. Cwm Giedd	M	H	1	0	1	0	2	2,000
15. Yr Allt/ Battle Hill	L	L	2	3	0	0	5	1,000
4. Trecwn	L	M	0	1	1	0	2	<1,000

In the Coed y Cymoedd forest district (South East Wales), visits per block ranged from 95,000 at Cwmcarn to around 2,000 per year at both Mynydd Dinas and Garw. The estimated total number of visits taken to Coed y Cymoedd blocks included in the survey was 248,000.

**Table B-4 – Estimated volume of visits to surveyed forests – Coed y Cymoedd 2004**

Block	Usage	Population	Official Car Parks	Unofficial Car Parks	Other Entrance	Permeable Boundaries	Total Entrances	Estimate of visits
	Classification (H/M/L)	Classification (H/M/L)						
41. Cwmcarn	H	H	3	2	3	0	8	95,000
29. Gellieion	M	M	1	2	0	0	3	67,000
1. Pembrey	H	M	0	4	0	2	6	25,000
50. Gwern Ddu/ Cefn Mabli	M	H	1	1	1	0	3	17,000
57. Hensol	M	M	0	1	0	0	1	14,000
51. Caerphilly Woods	H	H	1	2	1	0	4	9,000
59. Trecastle	L	H	1	1	0	0	2	7,000
7. Mill Wood	M	H	1	1	0	0	2	4,000
36. Aberbeg	L	M	0	2	0	0	2	3,000
37. Craig Fawr	L	M	0	0	2	0	2	3,000
14. Mynydd Dinas	L	M	0	1	1	0	2	2,000
26. Garw	M	M	1	3	0	0	4	2,000

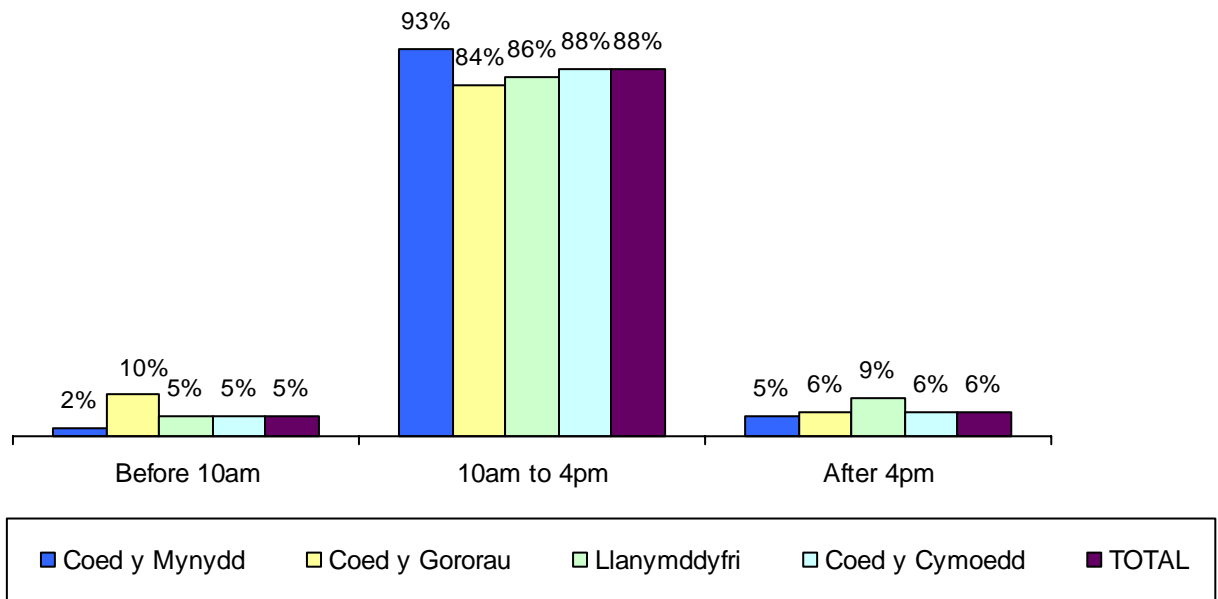
**Time of visits**

With counts undertaken during different times of day and different days of the week, it is possible to estimate total numbers of visits taken during a variety of time periods. In the following sections the profile of visits are presented for each of the forest districts and for Wales as a whole.

*Time of day of visit*

As might be expected, in all of the forest districts the majority of visits took place during the six hour period between 10am and 4pm. This was particularly the case in the Coed y Mynydd area (93%) while a slightly higher proportion of visits were estimated to take place in the morning in Coed y Gororau (10%) and more evening visits took place in Llanymddyfri (9%).

**Figure B-1 – Time of visit - all WAG woodland (%)**  
 Base: Annual hours of daylight from 6.30am to sunset (4,364 hours)

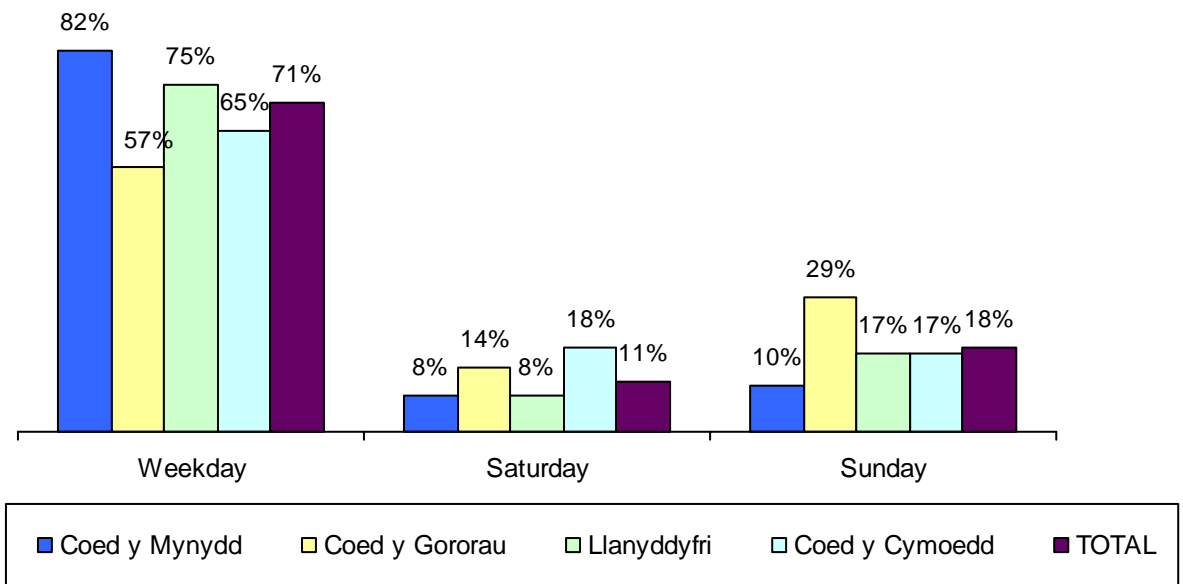


*Day of visit*

Around 7 in 10 visits to forests were estimated to have taken place on weekdays (71%), 11% were taken on Saturdays and 18% on Sundays.

A comparison of the estimates for each district suggests that a slightly higher proportion of weekday visits took place in the Coed y Mynydd district (82%) while the largest proportion of weekend visits were taken in Coed y Gororau (43%).

**Figure B-2 – Day of visit – all WAG woodland (%)**  
 Base: Annual hours of daylight from 6.30am to sunset (4,364 hours)



### Total visits to all WAG Woodlands

As mentioned previously, in each of the four forest districts the forest blocks selected to be included in the survey were chosen as representative of all WAG Woodlands in the area in terms of estimated levels of usage (high, medium or low) and the size of the surrounding population (high, medium or low)<sup>6</sup>. By applying these categorisations, each forest was placed into one of the following 9 'strata':

Strata	Population	Usage
1	High	High
2	High	Medium
3	High	Low
4	Medium	High
5	Medium	Medium
6	Medium	Low
7	Low	High
8	Low	Medium
9	Low	Low

To obtain an estimate of total numbers of visits to all WAG woodlands, the average number of visits per access point at forests included within the survey were applied to other forests in the same strata.

As such the following estimates of total numbers of visits to forests in each of the forest districts and across Wales as a whole have been obtained:

**Table B-5– Estimates of total visits to all WAG Woodlands 2004**

	Visits
Coed y Mynydd	1,400,000
Coed y Gororau	500,000
Llanymddyfri	1,030,000
Coed y Cymoedd	1,200,000
<b>Total – Wales</b>	<b>4.1m</b>

It is therefore estimated that around **4.1 million visits** are made to WAG woodland each year (excluding visits made during major events). As the table illustrates, the largest proportions of these visits were made to forests in the Coed y Mynydd and Coed y Cymoedd forest districts.

<sup>6</sup> See appendix 5 for more details of forests included and excluded from survey sample.

In addition, FCW estimate that around 200,000 visits were made to forests by spectators and participants during events which took place in 2004. The largest event, Wales Rally GB, is estimated to account for over half of these visits. Taking this total into account increases the estimate of total annual visits to around 4.3 million.



## **C. Visitor and visit characteristics**

In addition to counts being undertaken of visitors entering and leaving forests, some 765 interviews were undertaken with visitors. Each interview lasted approximately 10 minutes and used the questionnaire included in appendix 2.

With a total sample of 765, results are accurate to +/- 3.5% at the 95% confidence interval. In the following section only statistically significant variations are mentioned in the commentary.

The following sections provide the results of this aspect of the survey with results weighted to reflect total visitor numbers.

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## Party composition

The average party size was 2.1 people with around a third of all visits taken by people on their own (37%), 42% taken by couples/ groups of two and 20% taken by groups of 3 or more people.

The average party size was slightly higher in Llanymddyfri (2.4 people) but lowest in Coed y Mynydd (1.9). Average party size was also higher amongst visitors who were on holiday (2.4) and those who were on their first visit to the forest they were interviewed at (2.7). Conversely, party sizes were smaller amongst dog walkers (1.6), people who walked to the forest from their home (1.5) and amongst those aged 60 or over (1.7).

The table below illustrates the sex and age profile of respondents and their party members and, for comparison, the Welsh population profile.

**Table C-1 – Sex and age profile of all party members (%)**

Base: All party members (1,668)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL	Population of Wales*
<b>Sex</b>						
Male	53	53	53	66	56	48
Female	47	47	47	34	44	52
<b>Age</b>						
Under 5	1	4	4	3	3	6
5 to 10 years	4	5	6	7	6	6
11 to 15 years	3	13	3	8	6	7
16 to 24 years	6	3	15	10	9	12
25 to 34 years	14	8	15	19	15	13
35 to 44 years	20	19	20	19	19	14
45 to 59 years	25	31	22	21	24	20
60+ years	27	17	14	14	18	23

\*Source: Census 2001

Overall, slightly more than half of visitors to forests in Wales were male (56%). The higher proportion of male visitors was particularly notable in the Coed y Cymoedd area (66%) while the male/female split was more even in the other districts.

In terms of age profile, over two-fifths of all visitors were aged 45 or over (42%) while 15% were aged under 16. The age profile of visitors varied slightly between each of the forest districts with more visitors aged 60 or over recorded in the Coed y Mynydd area (27%)

while the largest proportion of children aged under 16 were recorded in Coed y Gororau (22%).

As illustrated in the table, in comparison to the population of Wales as a whole, visitors to WAG woodland were more likely to be male and more likely to be aged between 35 and 59.

As table C-2 below illustrates, the vast majority of visitors to forests in Wales were white (99%). Amongst those who stated that they were white, just under half were English (46%) while a similar sized proportion were Welsh (45%). The higher proportions of visitors with an English ethnicity were most notable in Coed y Mynydd and Coed y Gororau while the majority of visitors in the Coed y Cymoedd area were Welsh. Notably, as many as a third of visitors who lived in Wales were born in England (31%).

By comparison, the 2001 census recorded that 2% of the Welsh population were members of non-white ethnic groups and 20% were born in England.

**Table C-2 Ethnicity (%)**  
Base: All respondents (765)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL
<b>Total White</b>	<b>99</b>	<b>99</b>	<b>99</b>	<b>100</b>	<b>99</b>
- White – Welsh	28	31	45	70	46
- White – English	65	64	46	18	45
- White – other	5	3	5	2	6
<b>Asian</b>	1	1	-	-	*
<b>Black</b>	1	-	1	-	*
<b>Other</b>	-	-	-	-	-

- nil respondents \* fewer than 0.5%

Overall, just under a tenth of visitors (8%) stated that they or a party member had a disability or special need. Amongst these respondents, around three-quarters indicated that the disability related to hearing (78%) while smaller proportions stated that the disability related to mobility (13%) or sight (6%). By comparison, around 24% of residents of Wales are disabled, as defined by the Disability Discrimination Act.<sup>7</sup>

**Table C-3 Disabilities and special needs (%)**

Base: All respondents (765)

	<b>Coed y Mynydd</b>	<b>Coed y Gororau</b>	<b>Llanymddyfri</b>	<b>Coed y Cymoedd</b>	<b>TOTAL</b>
<b>Total in party</b>	<b>11</b>	<b>4</b>	<b>11</b>	<b>3</b>	<b>8</b>
- Hearing	(75)	(50)	(77)	(100)	(78)
- Mobility	(13)	(33)	(15)	-	(13)
- Sight	(6)	(17)	(8)	-	(6)

- nil respondents \* fewer than 0.5%

<sup>7</sup> Source: Family Resources Survey undertaken for UK Government.

## Visitor origin

Visitors were asked to provide their home postcode, allowing analysis of place of origin. The table below shows that nearly three quarters of respondents (70%) were from Wales, and a quarter from England (26%). 4% of respondents did not give a valid postcode.

Coed y Cymoedd had the highest proportion of visitors from Wales (81%) and Coed y Mynydd the lowest (59%).

**Table C-4 Visitor origin (%)**

Base: All respondents (765)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL
<b>Wales</b>	<b>59</b>	<b>66</b>	<b>70</b>	<b>81</b>	<b>70</b>
North	50	53	1	-	22
Valleys	-	-	22	42	19
Cardiff & South East	-	1	32	21	15
Mid/West	9	12	13	8	10
West South	-	-	2	10	4
<b>England</b>	<b>37</b>	<b>30</b>	<b>28</b>	<b>14</b>	<b>26</b>
North West	16	18	1	*	8
South West	3	-	13	8	7
West Midlands	10	8	4	1	5
South East	1	3	5	3	3
Yorkshire and The Humber	2	-	-	1	1
East Midlands	3	1	*	*	1
East of England	1	-	2	*	1
London	-	1	2	-	*
<b>Scotland</b>	-	<b>1</b>	-	-	<b>*</b>
<b>Overseas</b>	-	-	-	<b>1</b>	<b>*</b>
<b>Not known</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>4</b>	<b>4</b>

-nil respondents \* fewer than 0.5%

Welsh regions: North (Wrexham, Flint, Denbigh, Conwy, Anglesey, Gwynedd), Mid/West (Powys, Ceredigion, Carmarthen, Pembroke), West South (Swansea, Neath/Port Talbot, Bridgend), Valleys (Rhondda/Cynon/Taff, Merthyr, Caerphilly, Blaenau Gwent), Cardiff & South East (Cardiff, Vale of Glamorgan, Torfaen, Monmouth, Newport).

The table below compares the distribution of those visitors living in Wales with the mid-2003 population estimates for Wales. This shows that although West South Wales accounts for 17% of the population, only 5% of those interviewed in this survey were from this region. Conversely, 32% of those surveyed were residents of the North and 27% were residents of the Valleys, compared to population estimates of 23% and 18% respectively.

**Table C-5 Distribution of Welsh visitors (%)**

Base: Respondents living in Wales (541)

	Survey	Population*
North	32	23
Valleys	27	18
Cardiff & South East	21	26
Mid/West	15	17
West South	5	17

\* Mid-2003 population estimates (ONS)

## **Visitor profile**

The home postcode of respondents can also be used for visitor profiling. The majority of respondents (89%) gave a valid postcode.

Each of the postcodes was assigned an 'ACORN' code. The acorn classification was created by CACI Ltd using the cluster analysis of the 2001 Population Census, together with data from a number of other sources, to divide almost all postcodes into 56 'types'. These types can be aggregated into 17 'groups' (A to Q) and the groups into 5 broad 'categories'. Addresses in postcodes within any 'type' will therefore tend to have a lot in common and can be given a label that describes the typical member of that 'type'. E.g. 'Mature couples, smaller detached homes'.

The table overleaf shows the proportion of valid postcodes from visitors in each forest district that fall into each group and, for comparison, the equivalent proportion of each group in the UK population as a whole.

**Table C-6 ACORN coded postcodes (%)**

Base: All respondents who provided a valid postcode (679)

ACORN Group	UK Population Base	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	Total
<b>1. Affluent Achievers</b>	<b>23</b>	<b>48</b>	<b>50</b>	<b>41</b>	<b>28</b>	<b>41</b>
1.A. Wealthy Executives	7	8	14	16	9	11
1.B Affluent Greys	8	29	27	16	6	19
1.C. Flourishing Families	8	11	10	9	13	11
<b>2. Urban Prosperity</b>	<b>12</b>	<b>3</b>	<b>2</b>	<b>8</b>	<b>4</b>	<b>4</b>
2.D Prosperous Professional	2	2	2	3	2	2
2.E. Educated Urbanites	5	-	-	2	1	1
2.F. Aspiring Singles	4	2	1	3	1	2
<b>3. Comfortably Off</b>	<b>27</b>	<b>35</b>	<b>30</b>	<b>24</b>	<b>28</b>	<b>30</b>
3.G. Starting Out	3	2	1	2	2	2
3.H. Secure Families	15	23	14	15	18	18
3.I. Settles Suburbia	6	8	13	6	6	7
3.J. Prudent Pensioners	3	2	3	1	2	2
<b>4. Modest Means</b>	<b>14</b>	<b>8</b>	<b>6</b>	<b>17</b>	<b>33</b>	<b>17</b>
4.K. Asian Communities	1	-	-	-	-	-
4.L. Post Industrial Families	4	2	-	7	9	5
4.M. Blue Collar Roots	9	7	6	10	23	12
<b>5. Hard Pressed</b>	<b>23</b>	<b>6</b>	<b>11</b>	<b>10</b>	<b>7</b>	<b>8</b>
5.N. Struggling Families	13	5	10	8	6	7
5.O. Burdened Singles	5	-	1	2	1	1
5.P. High Rise Hardship	2	1	1	*	1	1
5.Q. Inner City Adversity	2	-	-	-	-	-

-nil respondents \* fewer than 0.5%

The table shows that forest visits are generally higher in the most prosperous communities (group 1), and lower in the urban (group 2) and low income communities (group 5).



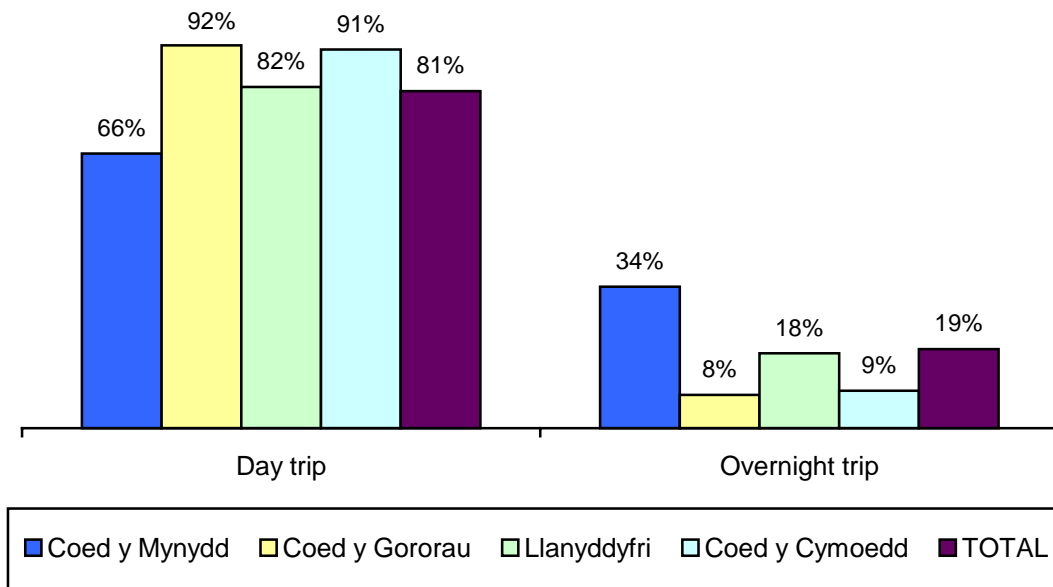
### Type of trip

As Figure C-1 below illustrates, a fifth of all visitors were on an overnight trip away from home when they visited the forest (19%) while the remainder of visitors were on a short trip/ day trip from home (81%).

The proportion of visitors on overnight trips was highest in Coed y Mynydd and Llanymddyfri districts (34% and 18% respectively).

Other groups more likely to be on overnight visits included those who were on their first ever visit to the forest (52% on overnight trips) and respondents aged under 35 (25%).

**Figure C-1 – Whether on a day trip or staying away from home (%)**  
 Base: All respondents (765)



### Overnight visits

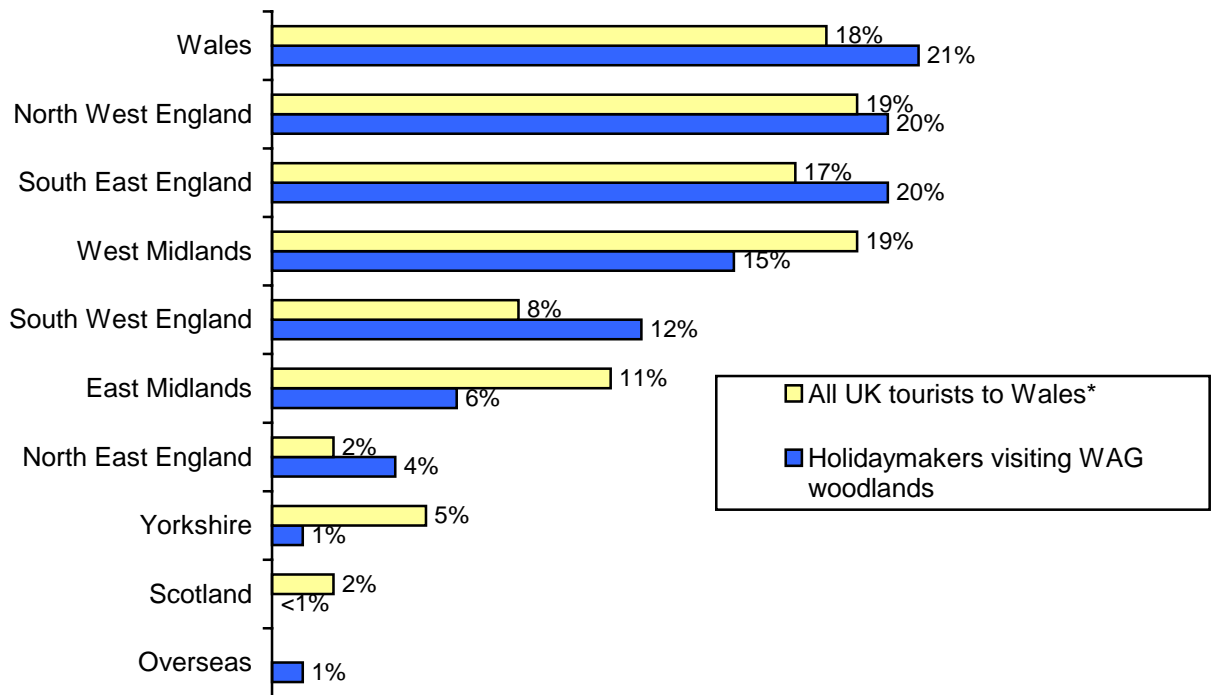
Visitors who were staying away from home were asked further questions relating to their trip.

#### *Place of residence*

Figure C-2 compares the place of residence of tourists who visited WAG woodlands while on holiday with the profile of domestic tourists to Wales during 2002. The main areas of origin of visitors to Welsh forests were Wales (21%), North West England (20%) and South East England (20%). Only 1% of tourists visiting forests were from overseas.

The origin profile of visitors to forests broadly reflects that of all domestic visitors to Wales.

**Figure C-2 –Place of residence of overnight visitors (%)**  
 Base: All respondents on overnight trips from home (124)



\*Source: Wales Tourist Board, United Kingdom Tourism Survey 2002

*Accommodation used*

Visitors who were staying away from home were asked to indicate the type of accommodation they had stayed in. Table C-7 compares the responses provided by forest visitors with the overall profile of domestic visitors to Wales.

A third of visitors to forests stayed in either a tent, caravan or cabin (33%) while 18% stayed in other self catering accommodation and 18% stayed in the home of a friend or relative. Smaller proportions used serviced accommodation such as a hotel, guesthouse or bed and breakfast.

By comparison, a larger proportion of all domestic visitors to Wales stayed in the homes of friends or relatives (35%) or a hotel (18%) while fewer camped, stayed in a caravan or used self catering accommodation (26% overall).

**Table C-7 – Overnight accommodation used (%)**

Base: All respondents on overnight trip from home (124)

	Visitors to WAG woodland	All UK visitors to Wales*
Tent/ Caravan/ Cabin	33	20
Self catering accommodation	18	6
Home of friend or relative	18	35
Guest House/ B&B	12	7
Hotel	8	18
Youth Hostel/ Outdoor Centre	7	1
Motor home	5	-

\* Source: Wales Tourist Board, United Kingdom Tourism Survey 2002

*Length of stay*

Visitors who were on an overnight trip from home were asked to indicate how many nights they were away in total and how many nights they spent in Wales. As the table below illustrates, an average of 5.2 nights were spent away from home and an average of 5.0 nights were spent in Wales. Just over half of visitors were on a short break of 1 to 3 nights from home (55%) while the remainder were on longer holidays.

**Table C-8 – Duration of overnight trips (%)**

Base: All respondents on overnight trip from home (124)

	<b>Nights away from home</b>	<b>Nights in Wales</b>
1 night	8	9
2 nights	33	33
3 nights	14	14
4 to 6 nights	12	13
7 to 14 nights	29	28
15+ nights	2	2
<b>Average:</b>	<b>5.2</b>	<b>5.0</b>

- nil respondents, \* Less than 0.5%

By comparison, the average length of stay amongst all domestic visitors to Wales was 3.3 nights during 2002 (Source: United Kingdom Tourism Survey 2002).

*Visits to forests*

Visitors on overnight trips were also asked to state the total number of visits they had taken to forests during their current holiday (including their current forest visit). Overall, an average of 3.2 visits were taken to forests with around a quarter of respondents visiting woodland on 4 or more occasions (26%).

**Table C-9 – Number of visits taken to forests, including current trip (%)**

Base: All respondents on overnight trip from home (124)

	<b>Visits</b>
1 visit	38
2 or 3 visits	30
4 to 10 visits	22
More than 10 visits	4
Don't Know	4
<b>Average:</b>	<b>3.2</b>

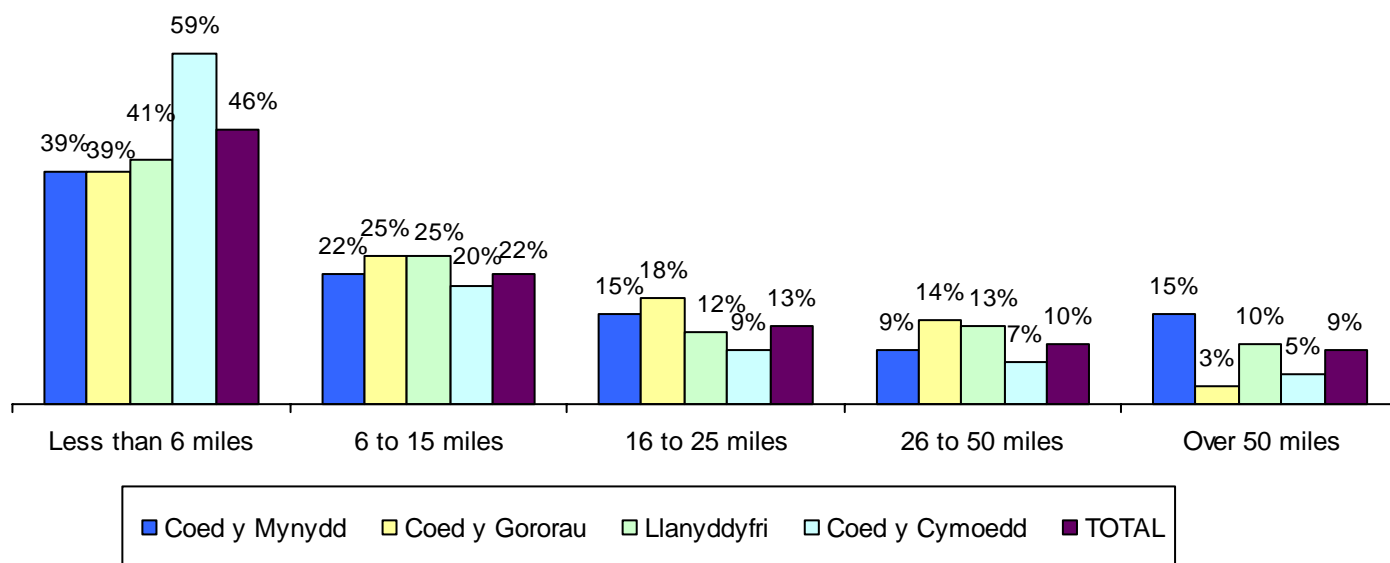
## Travel to the forest

### *Distance travelled*

All respondents were asked to indicate how far they had travelled to reach the forest, either from their home or the holiday accommodation they had used the previous night.

**Figure C-3 – Distance travelled to reach forest (%)**

Base: All respondents (765)



Overall, the largest proportions of visitors had travelled the shortest distances with 46% travelling under 6 miles and 22% travelling between 6 and 15 miles. Only 1 in 5 forest visitors travelled more than 25 miles to reach the forest (19%).

Distances travelled to reach forests varied between districts with the highest proportions of very local users (i.e. travelling under 6 miles) recorded in Coed y Cymoedd (59%) while visitors to forests in the Coed y Mynydd and Llanyddyfri districts were generally more likely to travel further to the forest.

Other variations in the distances travelled by different groups of visitors included:

- *Travelling less than 6 miles* – visitors who walked to the forest, dog walkers and those who go to the same forest at least once a week were the most likely to have travelled the shortest distance to the forest (95%, 69% and 75% respectively).

- *Travelling over 25 miles* – first time visitors to the forest and visitors on an overnight trip were more likely to have travelled over 25 miles (41% and 32% respectively).

### Transport used

As Table C-10 illustrates, the majority of visitors to forests travelled to the forest by car (81%). Much smaller proportions used other types of transport with 12% walking to the forest and 3% cycling. Less than 1% of all visitors used public transport to reach the forest.

**Table C-10 Mode of transport used to reach forest (%)**

Base: All respondents (765)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL
Car/ van	87	89	87	68	81
Walked all the way	8	5	6	22	12
Bicycle	1	2	2	6	3
Minibus/ coach	1	1	1	*	1
Motorhome	-	1	2	1	1
Horse	1	1	1	2	1
Motorbike	1	-	*	*	1
Public transport	-	1	-	*	*

- nil respondents \* fewer than 0.5%

Visitors to forests in Coed y Gororau district were the most likely to travel to the forest by car (89%) while a higher proportion of those visiting forests in Coed y Cymoedd walked to the forest (22%).

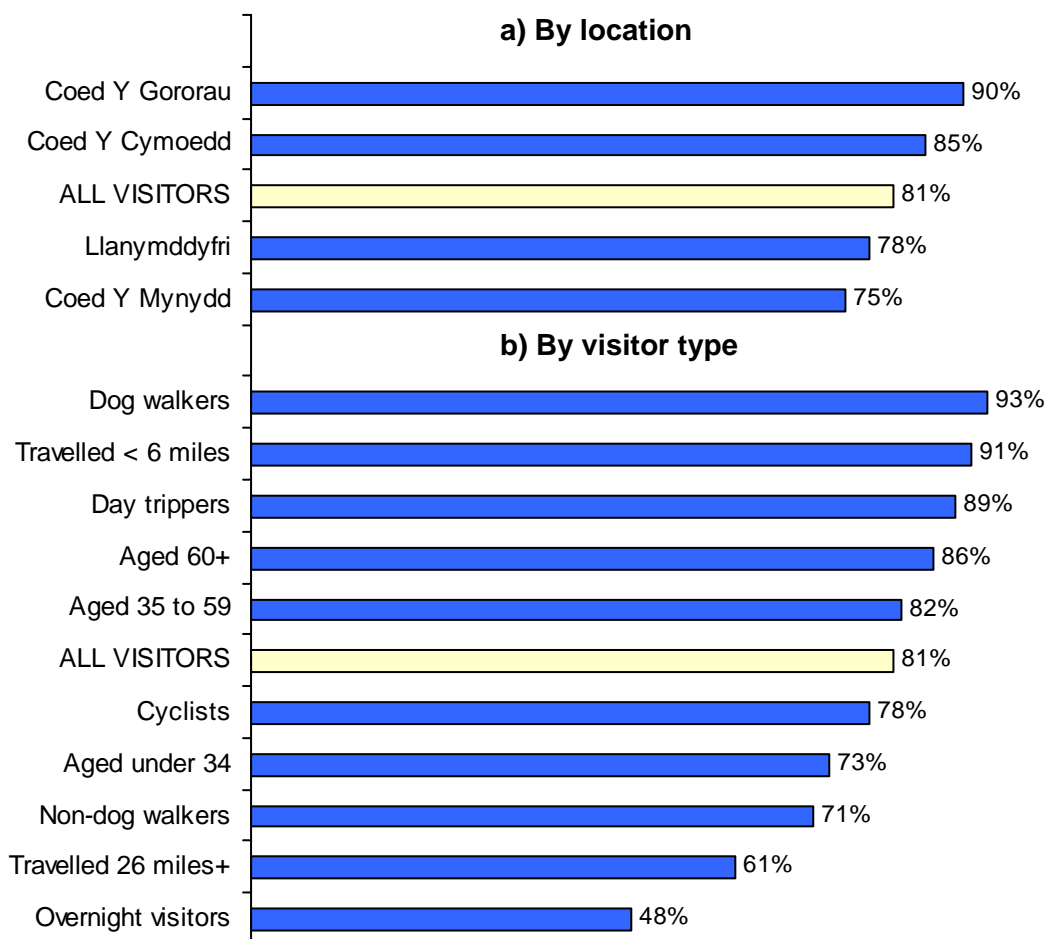
Other variations in the types of transport used to reach forests included the following:

- *Travel by car* – visitors aged 60 or more, visitors with a disability, those who travelled over 25 miles and those who visit the forest less than once a week were more likely to travel by car (83%, 90%, 94% and 90% respectively).
- *Walking* – visitors most likely to walk to the forest included those who travelled less than 6 miles, dog walkers and those who visited at least once a week (25%, 19% and 22% respectively).
- *Cycling* – as might be expected, visitors who took part in cycling or mountain biking while in the forest were also the most likely to cycle to the site (25%).

## Frequency of visits

Overall, 81% of visitors had been to that particular forest at least once before. However, as the chart below illustrates, the proportion of visitors on repeat visits varied between different groups. Visitors most likely to be on a repeat visit included dog walkers, those who travelled less than 6 miles to the forest and visitors to forests in the Coed y Gororau district (93%, 90% and 90% respectively). Smaller proportions of those who travelled over 25 miles and those who were on overnight trips had visited the forest before (61% and 48%).

**Figure C-4 –Proportions of repeat visitors (%)**  
Base: All respondents (765)



Visitors who had been to the forest before were asked to indicate how often they visited the forest. The table overleaf illustrates the proportions of respondents visiting at different levels of frequency and an estimate of the average number of visits made per year on the basis of these responses.

Overall, around a sixth of visitors went to the forest at least once a day (16%) with 6% stating that they typically visited more than once a day. A further quarter visited 1 to 3 times per week (23%) and 16% visited less often but at least once a month.

The following estimated numbers of visits taken per visitor per year have been applied to each of the possible responses:

- Visit more than once a day = 365 visits per year
- Visit once a day = 350 visits per year
- Visit 1 to 3 times a week = 100 visits per year
- Visit 1 to 3 times a month = 25 visits per year
- Visit 1 to 3 times a year = 2 visits per year
- Less often/ first visit = 1 visit per year

It can therefore be estimated that, across all of the forest districts, visitors typically took around 86 visits to the forest they were interviewed at each year. The highest average number of visits per year was recorded in Coed y Cymoedd (117 visits) while the average number was lowest in Coed y Gororau (67 visits).

**Table C-11 Frequency of visits to forest (%)**  
Base: All respondents (765)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL
More than once a day	8	3	3	8	6
Once a day	6	5	10	15	10
1 to 3 times a week	15	30	24	29	23
1 to 3 times a month	15	18	15	16	16
1 to 3 times a year	22	23	18	14	19
Less often	10	10	6	3	7
On first visit ever	25	10	22	15	19
<b>Average visits per year:</b>	<b>70</b>	<b>67</b>	<b>78</b>	<b>117</b>	<b>86</b>



Applying the estimate of average visits taken per visitor to the estimate of total visits it can be estimated that the 4.1 million visits were taken by 48,000 individuals.

### Duration of visit

Overall, the average length of visits to forests was around 1 and a half hours (1hr 32 mins). Just over half of visitors spent less than 1 hour (55%), 27% spent between 1 and 2 hours and the remaining 18% spent 2 or more hours.

As the table below illustrates, the average length of a visit varied between forest districts, with the longest in Coed y Gororau (1hr 47 mins) and the shortest average in Llanymddyfri (1hr 23 mins), a reflection of the larger proportion visiting for less than 30 minutes (31%).

**Table C-12 Amount of time spent in forest (%)**

Base: All respondents (765)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL
Less than 30 minutes	11	4	31	14	16
30 minutes to 1 hour	39	44	32	43	39
Over 1 hour to 2 hours	30	31	19	29	27
Over 2 hours to 3 hours	7	10	8	8	8
Over 3 hours to 4 hours	5	2	6	3	4
Over 4 hours	8	8	5	4	6
<b>Average duration of visit:</b>	<b>1hr 37 mins</b>	<b>1hr 47 mins</b>	<b>1hr 23 mins</b>	<b>1hr 29 mins</b>	<b>1hr 32 mins</b>

Further variations in the average duration of visits included the following:

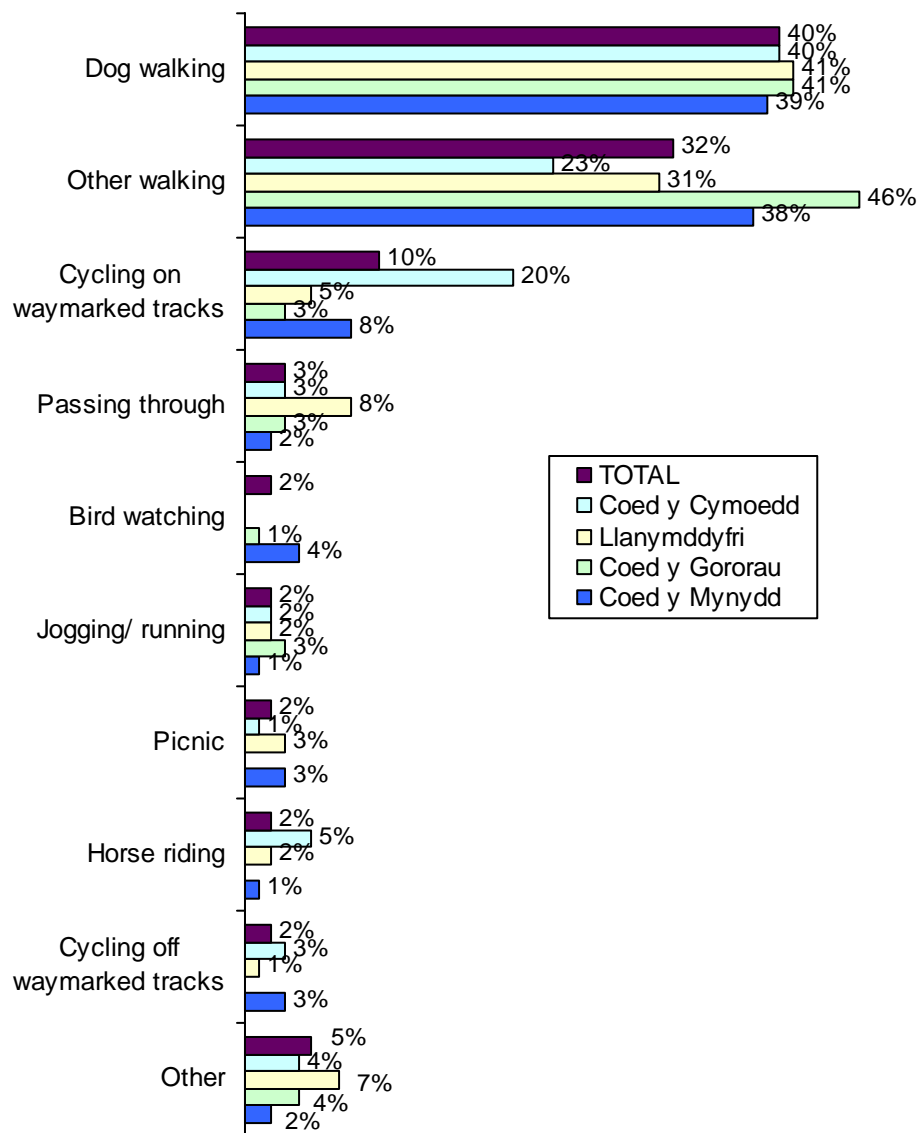
- *Longer than average visits* – visitors on overnight trips (2hrs 3 mins), visitors who travelled over 25 miles to the forest (2hrs 17 mins) and people who took part in walking without a dog (2 hrs 4 mins) were most likely to stay in the forest for longer than average.
- *Shorter than average visits* – visitors who lived within 6 miles of the forest (1hr 4 mins), those who visited at least once a week (1hr 4 mins) and dog walkers (1hr 4 mins) typically spent the least time in the forest.

### Activities undertaken in forest

The chart below illustrates the main activities undertaken by visitors to forests in Wales. The most popular activities overall were dog walking (40%), other walking (32%) and cycling on waymarked tracks (10%).

**Figure C-5 –Activities undertaken in the forest (%)**

Base: All respondents (765)



While levels of participation in dog walking were similar in all of the forest districts, proportions undertaking some of the other activities varied. Most notably, visitors to Coed y Gororau were more likely than those visiting other areas to take part in walking without a dog (46%), those who visited forests in Coed y Cymoedd were more likely to cycle on waymarked tracks (20%) or take part in horse riding (5%) and visitors to Coed y Mynydd were more likely to take part in bird watching (4%). By comparison a larger proportion of visitors to Llanymddyfri were just ‘passing through’ (8%).

Other variations in levels of participation in the main activities included the following:

- *Dog walking (40% overall)* – visitors more likely to take part in dog walking during their visit included female visitors (43% v 39% of males), visitors aged 60 or over (52%), people who travelled less than 6 miles to the forest (61%) and people who visited the forest at least once a week (69%).
  - *Other walking (32% overall)* – visitors more likely than average to walk *without* a dog included visitors on an overnight trip (48%), those who travelled between 6 and 25 miles to reach the forest (43%) and people on their first visit to the forest (50%).
  - *Cycling/ mountain biking on tracks (10% overall)* – visitors aged under 35 (18%) and those who travelled more than 25 miles to the forest (18%) were more likely to take part in cycling or mountain biking during their visit.
-

Table C-13 below compares the key characteristics of participants of the main activities with the profile of all visitors. Dog walkers were generally more likely than participants of the other activities to be female, aged 60 or over, on a day trip and had the shortest length of visit. By comparison, people who walked without a dog were the most likely to be on an overnight trip and to spend the longest duration in the forest while cyclists were the most likely to be male and aged under 60.

**Table C-13 – Profile of users by activity (%)**

Base: All respondents (765)/ Dog walkers (309)/ Other walkers (250)/ Cyclists (86)

	<b>All users</b>	<b>Dog walking</b>	<b>Other walking</b>	<b>Cycling/ mountain biking</b>
<b>Sex</b>				
Male	65	63	66	79
Female	35	37	34	21
<b>Age</b>				
16-34	22	14	24	38
35-59	53	54	49	56
60+	24	31	27	5
<b>Type of trip</b>				
Day trip	81	88	72	82
Overnight trip	19	12	28	18
<b>Average duration of visit</b>	<b>1hr 32 mins</b>	<b>1hr 4 mins</b>	<b>2hrs 4 mins</b>	<b>1hr 43 mins</b>

## Improvements to forest

When asked what one thing, if anything, could be done to improve the woodland they were visiting, almost two-thirds of visitors provided a suggestion (64%) while the remaining 36% stated that they could think of nothing or that no improvements were required.

As the table below illustrates, the most frequently provided suggestions related to signposting improvements, improvements to tracks, providing more bins and providing more toilets.

**Table C-14 One thing would like to improve to woodland (%)**

Base: All respondents (765)

	Coed y Mynydd	Coed y Gororau	Llanymddyfri	Coed y Cymoedd	TOTAL
More/ better signposting	13	6	8	9	10
Improve tracks	7	9	4	4	6
More/ better bins	4	5	6	4	5
More/ better toilets	5	5	6	3	5
More/ better seating	6	3	3	4	4
More/ better parking	4	7	4	3	4
More/ better cycle tracks	1	1	1	8	3
Tidy up walking paths	3	1	4	2	3
Better maintenance of car park/ entrance	4	1	2	2	2
Clean up litter	1	-	3	5	2
Stop/ reduce motorcycles	1	2	1	3	2
Plant more trees in cleared area	1	2	2	2	2
Replace conifers with oak trees	1	3	2	1	2
Stop fly tipping	1	-	2	2	1
Picnic/ BBQ area	1	1	1	1	1
Improve visitor centre	-	1	2	1	1
Tidy up car parks	1	2	1	-	1
Place to buy a map	2	-	*	-	1
Longer opening	1	-	1	*	1
<b>Nothing</b>	<b>35</b>	<b>43</b>	<b>40</b>	<b>31</b>	<b>36</b>

- nil respondents \* fewer than 0.5%

A full list of the suggestions provided at each of the sites included in the survey is provided separately. However, the following ‘verbatim’ comments illustrate some of the types of suggestions provided.

More/ better signposting (10% overall)

*“Signposts on the main road as you wouldn’t think there was anything here”* Coed Taf, Llanymddyfri

*“More signs showing length of walks and directions.”* Mill Wood, Coed y Cymoedd

Improve tracks (6% overall)

*“The paths are not what they should be. They should be better maintained and the drain needs better maintenance because it floods over every time we have heavy rain.”* Trecastle, Coed y Cymoedd

*“Make the pathways less slippery”* St Pierre/Copice/ Barnets, Llanymddyfri

More/ better toilets (5% overall)

*“Lights in the toilet block.”* Breidden, Coed y Gororau

*“More toilets and hand dyers.”* Coed Taf, Llanymddyfri

More/ better bins (5% overall)

*“It’s got to be the litter – so litter bins and signs telling people to take litter home.”* Mill Wood, Coed y Cymoedd

*“The provision of dog poo bins.”* Cwmcarn, Coed y Cymoedd

Improved/ better parking (4% overall)

*“Some gravel in the parking area so that its drier when you get back from the walk.”* St Pierre/Copice/ Barnets, Llanymddyfri

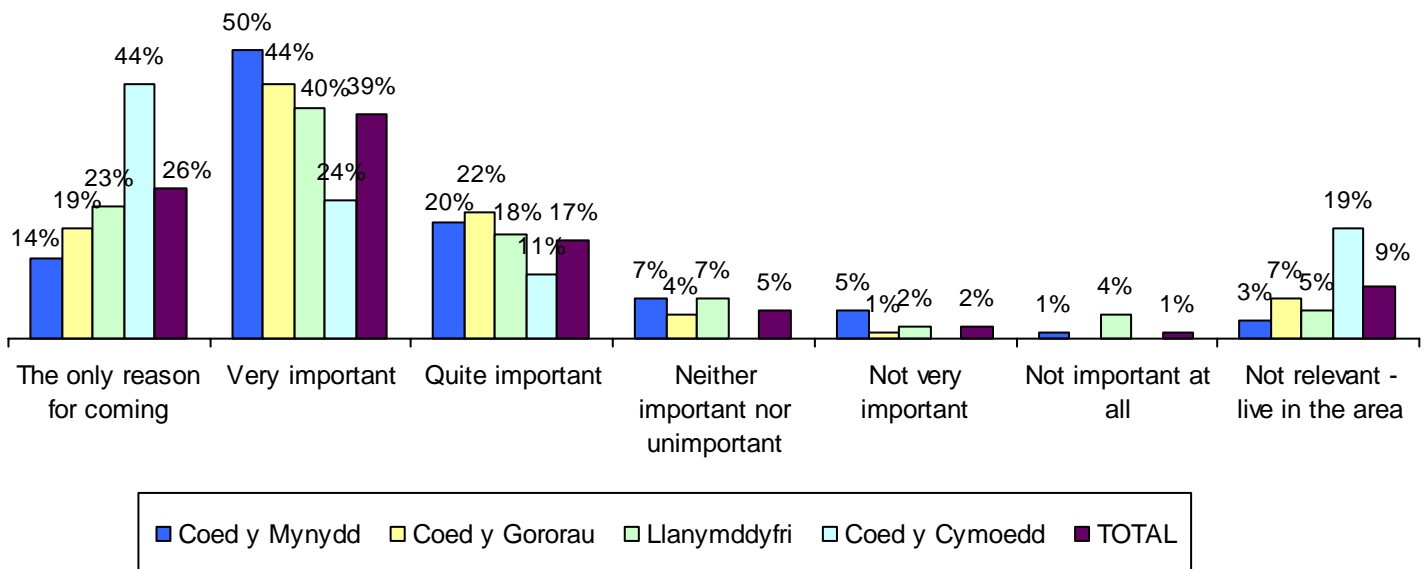
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### Influence of forest

All respondents were asked to indicate how important the presence of the forest they were visiting and its facilities had been in their decision to come to the area for their day out/ while on holiday.

As the chart below illustrates, while 1% of all visitors stated that the forest was ‘not important at all’ and 9% stated that the forest was ‘not relevant’ because they lived in the local area, larger proportions indicated that the forest was either their ‘only reason for coming’ (26%) or ‘very important’ (39%) in their decision to visit the local area.

**Figure C-6 – Importance of forest and facilities in decision to visit area**  
 Base: All respondents (765)



Around 2 in 5 visitors (39%) stated that the forest and its facilities was either their ‘only reason for visiting the area’ or ‘very important’ in their decision *and* they lived at least 6 miles from the forest.

By applying this proportion (39%) to the estimated total number of visits taken to forests in Wales during 2004 (4.1 million), it may be estimated that destination choices for at least 1.6 million visits were influenced by the presence of a forest.

## Expenditure and economic impact

### *Average spend per person per day*

All visitors were asked to specify how much money they had personally spent on the following categories that day and, if they were on an overnight trip, how much they had spent on their accommodation the previous night.

Across all respondents (day trippers and visitors on trips away from home), 43% spent nothing while 39% spent less than £20 in total. The average spend per person across all visitors (i.e. including those who spent nothing) was £13.

As the table below illustrates, around a tenth of visitors spent anything on overnight accommodation, with an average spend amongst those who spent anything (i.e. excluding zeros) of £36.

**Table C-15 Expenditure per person per day (row %)**

Base: All respondents (765)

	Nothing	Less than £20	£21 to £50	Over £50	Average (including zeros)	Average (excluding zeros)
Overnight accommodation	89	4	4	2	£4	£36
Food and drink	72	23	4	1	£4	£14
Admission fees	90	9	*	-	<£1	£3
Shopping (non-routine)	95	3	1	*	£1	£26
Transport	60	33	6	*	£4	£11
Equipment	99	1	-	*	<£1	£10
<b>TOTAL</b>	<b>43</b>	<b>39</b>	<b>10</b>	<b>7</b>	<b>£13</b>	<b>£24</b>

- nil respondents \* fewer than 0.5%

Total average spend per person varied between forest district and amongst different groups of visitors with the highest spend per person in Coed y Mynydd (£21) and Llanymddyfri (£15) and the lowest spend in Coed y Cymoedd (£7) and Coed y Gororau (£7).

Expenditure was highest amongst males (£15), those aged under 35 (£17), people on overnight trips (£49) and those who took part in cycling or mountain biking (£20) and lowest amongst day trippers (£5) and dog walkers (£7).



### *Economic benefits of forests*

By applying information on average levels of expenditure per person per day to data relating to the influence of forests on decisions to visit, it is possible to estimate total spend by visitors whose decisions to go to visit the area were affected by the presence of a forest to visit.

The following calculations apply these results to obtain an overall estimate:

- A: Total visits to forests = **4.1 million**
- B: Proportion of visits taken by people who stated that the forest and its facilities were their *only reason* or *very important* in their decision to visit the area<sup>8</sup> = **39%**
- C: Total visits taken due to forests and facilities (A x B) = **1.6 million**
- D: Average spend per person per day amongst those who visited due to forests and facilities = **£19**
- E: Estimated total spend per year by people who visited due to forests and facilities (C x D) = **£30 million**

This calculation suggests that approximately *£30 million* was spent by visitors who were influenced to take their visit to an area due to the forest and its facilities. This expenditure was made during the day of the forest visit and included overnight accommodation, food and drink, transport and non-routine shopping.

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<sup>8</sup> Excluding people who live locally (i.e. within 6 miles of forest) whose expenditure in the area is likely to have occurred regardless of the presence of the forest and its facilities.

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## D. Summary of results by forest district

The following table provides a summary of the key characteristics and variations in results obtained for each of the four forest districts.

	<b>Coed y Mynydd (North West)</b>	<b>Coed y Gororau (North East)</b>	<b>Llanymddyfri (Mid)</b>	<b>Coed y Cymoedd (South East)</b>
<i>Estimated total visits</i>	1,400,000	500,000	1,030,000	1,200,000
<i>Sex</i>	Slight majority are male (53%)	Slight majority are male (53%)	Slight majority are male (53%)	Large majority are male (66%)
<i>Age</i>	Large proportion aged over 60 (27%)	Large proportion of visitors are under 16 (22%)	Large proportion aged 16 to 44 (64%)	Large proportion aged 25 to 34 (19%)
<i>Type of trip</i>	Large proportion on overnight trips (34%)	Vast majority on day trips (92%)	Nearly a fifth on overnight trips (18%)	Vast majority on day trips (91%)
<i>Travel to forest</i>	1 in 7 visitors travel over 50 miles (15%)	More likely to travel 6 to 25 miles (43%)	Most travel under 15 miles (66%)	Over half travel under 6 miles (59%)
<i>Transport used</i>	Vast majority travel by car (87%)	Vast majority travel by car (89%)	Vast majority travel by car (87%)	More likely to walk to forest (22%)
<i>Frequency of visits</i>	Lowest proportion of repeat visits (75%)	Highest proportion of repeat visits (90%) but lowest frequency of visit.	Majority are repeat visitors (78%)	Highest frequency of visits (av. 117 per year).
<i>Duration of visits</i>	Average duration of 1 hour 37 minutes	Longest duration at 1 hour 47 minutes	Shortest duration at 1 hour 23 minutes	Average duration of 1 hour 29 minutes
<i>Activities undertaken</i>	More likely than other areas to birdwatch.	More likely to walk without a dog.	More likely to just 'pass through'	More likely to cycle on tracks.
<i>Expenditure per day</i>	£21	£7	£15	£7

## **E. Appendices**

**1. All WAG Woodlands Methodology Guidance**

**2. Questionnaire**

**3. Contact Sheet**

**4. Count Sheet**

**5. WAG woodland**

**6. Confidence intervals for volume of visitors**

## **Appendix 1 - All WAG Woodlands Methodology Guidance**

### 1. Introduction

These guidance notes outline the visitor monitoring methodology which aims to predict visitor numbers in Wales.

Significant changes to the previous monitoring system have been made. These include changing to a national survey and placing greater emphasis on the accuracy of the visitor number data. The survey may be repeated every 3 to 5 years.

Forest Enterprise (FE) has been collecting visitor-monitoring information throughout Great Britain since 1996. There were 2 main elements to the programme:

- interviewer based surveys

This programme operated annually with around 12 Forest Districts (Forest Districts are management areas – 31 across GB) taking part each year, so that all Forest Districts were covered within three years. Generally, however, only one or two sites per Forest District were monitored each time. The aim was to find the types of visitors using FE woodlands.

- counting numbers of visitors at a range of sites

This programme operated in all Forest Districts with around 140 mechanical counters installed on a permanent basis. The national aim was to measure changes in visitor numbers between years at the selected sites where counters were installed and the counter data also met some local needs.

### 2. Purpose of survey

The current visitor monitoring approach focuses on a core number of high-developed sites and generally we know little about visitor use elsewhere and in particular about local use of woodlands.

The purpose of the method outlined here is to provide more reliable estimates of visitor numbers, visitor activities and profiles of different types of visitors.

The sampling will apply the same amount of effort to each selected forest block within the Forest District. Blocks will be categorised by their local population density and their level of use. This will allow for comparisons to be made between blocks with similar characteristics.

---

### 3.0 All Sites

The aim of this survey is to provide more reliable estimates of visitor numbers, visitor activities and profiles of different types of visitors than previously. It will be applied across the whole FC estate in Wales in 2004 and will take into account the whole range of forest types. It is expected that this survey will take place every three to five years.

The basis of this programme will be forest blocks and access points within forest blocks. Blocks will be categorised by their level and type of use on the basis of local judgement. Local categorisation should allow for greater stratification of forest blocks within districts and across the country than if countrywide measures were applied.

Sampling will take place at all access points within a sample of blocks from each Forest District (typically 20% of a district's blocks) and a statistical model will be developed to apply the information gathered across similar access points and similar blocks within the district.

#### 3.1 Blocks

Forest Districts will stratify their forests into blocks. A block is an area (of whole compartments) in which most visitors would be expected to stay in one visit. The block will be categorised by level of population (within 15km) and level of use. Level of use and population density will be categorised as high, medium or low and will be based on local perception. A range of data will be gathered for each block by completing the Block Spreadsheet. This will include information such as the types of facilities available and types and numbers of access points. In addition some of the block characteristics are also required. These include whether the block is freehold or leasehold, and local staff's perception of whether it is used predominantly by locals or holidaymakers.

On the basis of the above information Economics & Statistics, FC Wales and the district will choose blocks to be surveyed. Choices will be aimed at providing a range of use and population levels and a range of locations across the district. Approximately 20% of a district's blocks will be selected for sampling.

When a leasehold block is selected for survey the district should notify the landowner, in advance, that the work is due to go ahead.

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### 3.2 Access Points

For each of the blocks selected for survey, information about the block's access points will need to be gathered and entered into the Access Point Spreadsheet. This will include information such as access point type (official car park, unofficial car park, other entrance, or 'permeable boundary' (see below)) and a grid reference for each access point. Completing this spreadsheet will generate a unique reference number for each access point in the FE estate. This will be used during information gathering and analysis.

In addition Forest Districts will produce maps to show the blocks to be surveyed with the access points, the access point code and each access point's unique number marked.

Permeable boundaries will be treated separately. For mapping they will be shown as a line and given one access code. Where entry points can be identified they will be assigned as an access point and each access point will be treated as described above. If the permeable boundary cannot be treated by this method a separate methodology will be prepared.

### 3.3 Selecting blocks

About 20% of each Forest District's blocks will be sampled. This will give around ten blocks per district which are sampled. Blocks for sampling will be chosen on the basis of their population and usage categories.

The matrix below will be used as an idealised template for selecting the proportion of blocks in each category to be sampled. We wish to choose blocks to sample in the same proportions as indicated here. As it is likely that a Forest District's blocks won't be spread evenly across the matrix we will take account of the actual number of blocks in each cell and some adjustment will be required when selecting blocks.

---

BLOCK SELECTION MATRIX		USAGE		
		HIGH	MEDIUM	LOW
POPULATION	HIGH	2		1
	MEDIUM			
	LOW	2		1

Unusually Busy blocks may have to be treated separately and may require a slightly different sampling system. In most cases we will wish to sample these blocks. Other 'atypical' blocks also require consideration, for example blocks where there is only limited access, or blocks where more than half, say, of the boundary is permeable.

### 3.4 Sampling procedure

Sections 4.3a and 4.3b below set out the system that will be used in the 2004 programme contract for counting and interviewing. Monitoring will follow a predetermined programme and will take place whatever the weather conditions.

## 4.0 Sampling

### 4.1 Contract for All Forests Monitoring Methodology

The programme will run for a full 12 month period, from January 2004 to January 2005.

While Forestry Commission Wales will set out the sampling systems and locations and provide all relevant background information we will expect that contractors should adopt a flexible approach. In particular, FC Wales, Economics & Statistics and the contractors will meet in March 2004 to discuss progress and any issues which have arisen during the first few weeks of fieldwork. As a result, some modifications to the schedules may be required.

There may be the possibility of extension of the contract, for a repeat survey, in 3 to 5 years.

## 4.2 Sites for Monitoring

FC Wales and Economics & Statistics have selected 20% of each district's forest blocks for sampling. Each block has been categorised based on level of use (high, medium or low) and population level within 15km (high, medium or low). Paragraph 4.1 describes the methodology for selecting blocks.

Within each block access points have been split into the following codes:

- A = official car park
- B = unofficial car park
- C = other entrance
- D = permeable boundary

Every access point in the selected forest blocks must be monitored. Monitoring will consist of counting visitor numbers into and out of access points and also conducting visitor surveys at access points.

Contractors will be supplied with maps showing the location of blocks and access points after the contract is awarded.

## 4.3 Monitoring System

We need to make observations (counts and interviews) at a variety of dates and times. The observation periods that must be covered are:

- weekdays
  - Saturdays
  - Sundays
  - early (sunrise-1000)
  - middle (1000-1600)
  - late (1600-sunset).
-



Monitoring will be set out in a predetermined programme. Templates are shown below and as part of the contract the contractor will draw up a timetable for each Forest District in Wales and agree it with FC Wales before the monitoring starts. A timetable is not required as part of the tender.

a. Counting

Counting will be carried out at all the access points for the selected blocks. Each access point will have a total of 9 count observations spread across the three time periods and in each of the three 'day of week' periods. Around 60% of the counting observation periods will take place during the "middle" time period, with the remaining 40% split between the "early" and "late" time periods.

The matrix below gives an example of how the times and days might be distributed throughout the 12-month period. Access point 1 from block 1 (\*), and access point 2 from block 1(♣) are indicated. They cover all time periods and all 'day of week' options and are spread over the 12 month fieldwork period.

Over the 12 month period;

\* = Block 1, Access Point 1

♣ = Block 1, Access Point 2

Month	Weekday (rotate Mon-Fri)			Saturday			Sunday		
	Early	Mid	Late	Early	Mid	Late	Early	Mid	Late
January				*	♣				
February								*	♣
March	♣	*							
April					*	♣			
May							♣	*	
June	*	♣							
July					♣	*			
August								♣	
September		*							
October		♣							
November									*
December									

Each time an access point has an 'early' slot it should try to be at a different hour during the early period, for example the first one could be 0800-0900 and the second 0900-1000.

Adding each access point in a similar manner to (an extended version of) the grid above means that the following total counting times should be reached for each weekday (1), Saturday and Sunday during the period. It should be possible for one counter to complete 6 counting periods in one day, at different access points. Obviously the geographic location of access points to be surveyed in any one day will need to be considered. At any time we only want to be counting at one access point in each block. E.G. On a specific day at 10am counting can be going on at Block 1, Access point 1 and Block 2 access point 1, but not at Block 1 access point 1 and Block1 access point 2.

Counts and observations will be made of people entering **and** leaving the access point.

#### b. Interviewing

Interviewing will take place at each access point at the same time as counting is undertaken. It is hoped that a minimum of 100 interviews will be completed at the majority of forest blocks.

Interviews will be conducted as people **exit** the forest. The questionnaire to be used will be agreed with contractors prior to the start of fieldwork and will be bilingual. Where possible, Welsh language speaking interviewers should be used.

#### 4.4 Recording and Return of Data

Count and interview observations will be recorded as described above (4.3a and 4.3b) on the templates shown in Appendices 5 and 6. The data should be input and supplied electronically to FC Economics & Statistics in a format which can be imported into SAS analysis system.

It is important that information collected to date is copied to FC Economics & Statistics in advance of the meeting to be arranged for March 2004, to permit exploration of the data prior to that meeting.

#### 4.5 Contact with Pilot Forest Districts

Contractors will liase on a weekly basis with Forest Districts. They should contact the Forest District on Friday morning each week to let the district know their timetable for the following week. The district will provide information on any forest activity that may affect the contractor and the observations.

---

In addition, when the contractor contacts the district each Friday, the district will let them know of any permitted events/activity that are due to take place in the survey blocks. The information will include the type of event/activity, the date, the block and the expected numbers. The contractor will note this on the relevant batch sheet(s).

The Forest District will supply the contractor with copies of local leaflets for issue to the public if information is requested.

Contractors should carry photo identification at all times.

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**Appendix 2 – Questionnaire**

<b>FORESTRY COMMISSION VISITOR MONITORING WALES (014874)</b>						<u>OFFICE USE ONLY</u> (1 - 6) 014874 (7-10) - - - - (11) 1																													
Name.....						(12)																													
Address.....						<b>Sex:</b> Male 1 Female 2																													
Postcode <table border="1" style="display: inline-table; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td>(25)</td><td>(26)</td><td>(27)</td><td>(28)</td><td>(29)</td><td>(30)</td><td>(31)</td> </tr> </table>													(25)	(26)	(27)	(28)	(29)	(30)	(31)	<b>Location code:</b> (see instructions) <table border="1" style="display: inline-table; border-collapse: collapse; text-align: center;"> <tr> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> <td style="width: 20px; height: 20px;"></td> </tr> <tr> <td>(13)</td><td>(14)</td><td>(15)</td><td>(16)</td><td>(17)</td><td>(18)</td><td>(19)</td> </tr> </table>									(13)	(14)	(15)	(16)	(17)	(18)	(19)
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(13)	(14)	(15)	(16)	(17)	(18)	(19)																													
Telephone number.....																																			
<b>Date of interview</b>		Day		Month		<b>Age:</b>																													
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<b>Place of residence:</b> (from address)																																			
(39)																																			
(40)																																			
<b>SHOW CARD A</b>																																			
Please indicate which of the following ethnic groups you consider that you belong to.																																			
<b>White</b>		(21)		<b>Black, Black Scottish, Black Welsh, Black English or other Black British</b>		(22)																													
Scottish		1		Caribbean		1																													
Welsh		2		African		2																													
English		3		Any other Black background (WRITE IN)		3																													
Other British		4		.....																															
Irish		5		<b>Mixed</b>																															
Any other White background (WRITE IN)		6		Any Mixed background (WRITE IN)		4																													
.....				.....																															
<b>Asian, Asian Scottish, Asian Welsh, Asian English or other Asian British</b>				<b>Other ethnic background (WRITE IN)</b>		(23) (24)																													
Indian		7		.....																															
Pakistani		8		.....																															
Bangladeshi		9		.....																															
Chinese		0		.....																															
Any other Asian background (WRITE IN)		X		.....																															

DECLARATION: Interview conducted by me with respondent named above in accordance with instructions and MRS Code of Conduct

Interviewer.....Interviewer ID..... Date.....

*Good....., I am an interviewer from NFO WorldGroup, an independent market research agency. We are conducting a survey of visitors on behalf of the Forestry Commission. Your views are very important. Could you spare a few minutes to answer some questions?*

First of all, can I check that you have not been interviewed already at *this woodland site/ here:*

**\*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE'**

Yes – been interviewed already	1	Close
-----	-----	-----
No – not been interviewed	2	Continue

Q.1a) Have you travelled from home today?

	(41)
Yes	1
-----	-----
No	2

Q.1b) And will you be returning home later today?

	(42)
Yes	1
-----	-----
No	2

**IF RESPONDENT HAS TRAVELLED FROM HOME AND IS RETURNING HOME TODAY (CODE 1 AT Q.1a AND Q.1b) GO TO Q3.  
IF RESPONDENT HAS NOT TRAVELLED FROM HOME AND/OR IS NOT RETURNING HOME TONIGHT (CODE 2 AT Q1a OR Q1b) ASK Q2**

**SHOW CARD B**

**IF RESPONDENT DID NOT TRAVEL FROM HOME TODAY ASK:**

Q.2a) What type of accommodation did you stay in last night?

**ALTERNATIVELY, IF RESPONDENT TRAVELLED FROM HOME BUT IS NOT RETURNING TONIGHT ASK:**

What type of accommodation will you stay in tonight?

SINGLE CODE

	(43)
Tent/Caravan/Cabin	1
Guest House/Bed and Breakfast	2
Hotel	3
Staying with friends/relatives	4
Youth Hostel/Outdoor Centre	5
Self-catering	6

Other (SPECIFY)

.....

Q.2b) How many nights in total will you be spending **away from home** during your current trip?

(44) (45)

WRITE IN

Q.2c) And how many nights of these nights, if any, will you be spending **in Wales**?

(46) (47)

WRITE IN

Q.2d) During your trip away from home, how many times will you set out specifically to visit a forest or wood? Please include your current trip.  
**REMEMBER TO INCLUDE CURRENT FOREST VISIT.**

(48) (49)

WRITE IN

**ASK ALL**

**SHOW CARD C**  
Q.3 How far did you travel to get here today, from your home or holiday accommodation?  
SINGLE CODE. NOTE - THIS IS ONE DIRECTION ONLY. (50)

Less than 6 miles/ 10 km	1
6 to 15 miles/ 11 to 25 km	2
16 to 25 miles/ 26 to 40 km	3
26 to 50 miles/ 41 to 80 km	4
Over 50 miles/ Over 80 km	5
Don't Know	Y

**SHOW CARD D**  
Q.4 What was the main type of transport you used to get here today?  
SINGLE CODE TRANSPORT USED TO TRAVEL THE LONGEST PART OF THEIR JOURNEY (51)

Car/ Van	1
Minibus/Coach	2
Public transport (scheduled bus, train, taxi, etc.)	3
Bicycle	4
Walked	5

Other (SPECIFY) (52) (53)

.....

Q.5a) Have you been to *this woodland site/ here*\* before?  
\*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE' (54)

	Yes	1	Ask Q5b
	No	2	Skip to Q6

**IF YES, ASK Q.5b)**  
**IF NO, SKIP TO Q.6**

**SHOW CARD E**

- Q.5b) How often, on average, do you come here?  
 SINGLE CODE (55)
- |                      |   |
|----------------------|---|
| More than once a day | 1 |
| Once a day           | 2 |
| 1 to 3 times a week  | 3 |
| 1 to 3 times a month | 4 |
| 1 to 3 times a year  | 5 |
| Less often           | 6 |
| Don't Know           | Y |

**ASK ALL**

**SHOW CARD F**

- Q.6 What was your main activity during your visit today?  
 SINGLE CODE (56)
- |   |   |
|---|---|
| Dog walking   | 1 |
| Other walking   | 2 |
| Cycling/ Mountainbiking <u>on</u> waymarked tracks                          | 3 |
| Cycling/ Mountainbiking <u>off</u> waymarked tracks                         | 4 |
| Horse riding  | 5 |
| Picnic  | 6 |
| Seeing something in the woodland (e.g sculptures, ancient tree, waterfalls) | 7 |
| Just passing through  | 8 |
- An organised event (PLEASE SPECIFY) (57)
- .....
- Other activity (SPECIFY)
- .....

- Q.7 How long have you been in *this woodland/ here\** today?  
 \*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE'

RECORD TO THE NEAREST 15 MINUTES	Hours	Minutes
	(58)	(59) (60)

- Q.8a) Do you (or anyone else in your group) have a disability or special needs?
- |     |           |            |
|-----|-----------|------------|
| Yes | (61)<br>1 | Ask Q8b    |
| No  | 2         | Skip to Q9 |

**IF YES ASK Q8b.**  
**IF NO, GO TO Q9**



Q.8b) What type of disability or special need, do you (or anyone in your group) have?  
**CODE ALL MENTIONED**

Sight	(62)
Hearing	1
Mobility	2
Other (SPECIFY)	3

..... (63)

**ASK ALL**  
 Q.9 If we could improve just one thing about *this woodland/ here\**, what should it be?  
 \*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE'

..... (64)

..... (65)

..... (66)

**SHOW CARD G**  
 Q.10 How important was the presence of this forest and its facilities in your decision..

**DAY TRIPPERS:** to come to this area for a day out?  
**THOSE STAYING AWAY FROM HOME:** to visit this area while on holiday?  
**SINGLE CODE**

The only reason for coming	1	(67)
Very important	2	
Quite important	3	
Neither important nor unimportant	4	
Not very important	5	
Not important at all	6	
Not relevant – I live in this area	7	
Don't know	Y	

.11 Next I would like to ask you about your spending **TODAY**.

<b>OFFICE USE ONLY</b>	
(1 - 10) REPEAT	
(11) 2	

**IF NOT STAYING AWAY FROM HOME (CODE 1 AT Q1A and Q1B) DO NOT ASK Q.11a)**

.11a) How much did you **personally** spend on accommodation (including food and drink at the accommodation) **LAST NIGHT**?

**OR**

**IF RESPONDENT HAS NOT YET SPENT A NIGHT AWAY FROM HOME**

How much do you personally expect to spend on accommodation (including food and drink at the accommodation) **TONIGHT**? Please **include** the amount spent/you will spend on any others (adults and children) for whom you have paid/will pay. If you are on a business trip please include any expenditure paid for by your company.

WRITE IN BELOW UNDER APPROPRIATE AREA. IF RESPONDENT DOES NOT KNOW EXACT AMOUNT AN ESTIMATE WILL DO. DO **NOT** LEAVE BLANK. IF NOTHING WRITE IN 0 0 0. IF DON'T KNOW WRITE IN D/K

11(b-h) **ASK ALL, SHOW CARD H**

Can you tell me how much you **PERSONALLY** have spent/will spend **TODAY** on each of the following categories. That is the amount you have spent today already plus that which you will spend later today. Please **include** the amount spent/you will spend on any others (adults and children) for whom you have paid/will pay. If you are on a business trip please include any expenditure paid for by your company.

IF RESPONDENT IS UNABLE TO GIVE SPENDING ON EACH CATEGORY ASK FOR THEIR TOTAL SPENDING TODAY  
WRITE IN BELOW UNDER APPROPRIATE AREA. IF RESPONDENT DOES NOT KNOW EXACT AMOUNT AN ESTIMATE WILL DO. DO **NOT** LEAVE BLANK. IF NOTHING WRITE IN 0 0 0. IF DON'T KNOW WRITE IN D/K

	£		
a) Accommodation (incl. food & drink)	12	13	14
b) Food and drink (excluding at accommodation)	15	16	17
c) Admission fees (to attractions)	18	19	20
d) Shopping (non-routine, e.g. souvenirs)	21	22	23
e) Transport (including, petrol, taxis, public transport etc)	24	25	26
f) Equipment (e.g. hire of boat, horse-riding)	27	28	29
g) Other miscellaneous items	30	31	32
h) <b>TOTAL</b>	33	34	35

- Q.12a) Can you tell me the age group and sex of all the people with you on this visit. Please remember to **include** yourself. CODE BELOW  
IF IN A LARGE GROUP/IN A COACH PARTY ONLY RECORD DETAILS OF THE IMMEDIATE PARTY

	Male	Female
Under 5 years	(36)	(44)
5 – 10 years	(37)	(45)
11 – 15 years	(38)	(46)
16 – 24 years	(39)	(47)
25 – 34 years	(40)	(48)
35 – 44 years	(41)	(49)
45 – 59 years	(42)	(50)
60+ years	(43)	(51)

- Q.12b) ALSO PLEASE RECORD THE NUMBER OF DOGS, BICYCLES AND /OR HORSES WITH RESPONDENT  
WRITE IN BELOW IF NONE WRITE IN 0

Dogs	(52)
Bicycles	(53)
Horses	(54)

**COLLECT CLASSIFICATION DETAILS AND THANK RESPONDENT**

**Appendix 3 – Contact sheet**

<p><b>FORESTRY COMMISSION VISITOR MONITORING (014874) CONTACT SHEET</b></p>	<p><b>OFFICE USE ONLY</b> (1-7) 014874A (8-11) _ _ _ _ _</p>																								
<p><b>Location Code</b></p> <table style="width: 100%; text-align: center;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> </tr> <tr> <td>(12)</td> <td>(13)</td> <td>(14)</td> <td>(15)</td> <td>(16)</td> <td>(17)</td> <td>(18)</td> </tr> </table>								(12)	(13)	(14)	(15)	(16)	(17)	(18)	<p><b>Interviewer (initials)</b></p> <p>_____</p>										
(12)	(13)	(14)	(15)	(16)	(17)	(18)																			
<p><b>Date of interview shift</b></p> <table style="width: 100%; text-align: center;"> <tr> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 60px; height: 20px;"></td> </tr> <tr> <td>(19)</td> <td>(20)</td> <td>(21)</td> </tr> </table>				(19)	(20)	(21)	<p style="text-align: center;"><b>Day</b>                      <b>Month</b></p>																		
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<p><b>Interview shift <u>start</u> time</b></p> <table style="width: 100%; text-align: center;"> <tr> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td>(24 hour clock)</td> </tr> <tr> <td>(22)</td> <td>(23)</td> <td>(24)</td> <td>(25)</td> <td></td> </tr> </table>					(24 hour clock)	(22)	(23)	(24)	(25)		<p><b>Interview shift <u>end</u> time</b></p> <table style="width: 100%; text-align: center;"> <tr> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td style="border: 1px solid black; width: 40px; height: 20px;"></td> <td>(24 hour clock)</td> </tr> <tr> <td>(26)</td> <td>(27)</td> <td>(28)</td> <td>(29)</td> <td></td> </tr> </table>					(24 hour clock)	(26)	(27)	(28)	(29)					
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<p><b>Weather</b> CIRCLE ONE NUMBER ON EACH ROW. USE 2 FOR MIDDLING/ MIXED WEATHER</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: right;">Dry</td> <td style="width: 5%; text-align: center;">1</td> <td style="width: 5%; text-align: center;">2</td> <td style="width: 5%; text-align: center;">3</td> <td style="width: 15%; text-align: left;">Wet</td> <td style="width: 50%; text-align: right;">(30)</td> </tr> <tr> <td style="text-align: right;">Hot</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: left;">Cold</td> <td style="text-align: right;">(31)</td> </tr> <tr> <td style="text-align: right;">Sunny</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: left;">Overcast</td> <td style="text-align: right;">(32)</td> </tr> <tr> <td style="text-align: right;">Calm</td> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">3</td> <td style="text-align: left;">Windy</td> <td style="text-align: right;">(33)</td> </tr> </table>		Dry	1	2	3	Wet	(30)	Hot	1	2	3	Cold	(31)	Sunny	1	2	3	Overcast	(32)	Calm	1	2	3	Windy	(33)
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Sunny	1	2	3	Overcast	(32)																				
Calm	1	2	3	Windy	(33)																				
<p><b>Number of completed interviews</b></p> <table style="width: 100%;"> <tr> <td style="border: 1px solid black; width: 60px; height: 25px;"></td> <td style="width: 40px; text-align: right;">(34)</td> </tr> </table>		(34)	<p><b>Total number of refusals</b></p> <table style="width: 100%;"> <tr> <td style="border: 1px solid black; width: 60px; height: 25px;"></td> <td style="width: 40px; text-align: right;">(35)</td> </tr> </table>		(35)																				
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<p><b>Number of contacts not interviewed because of Welsh language</b></p> <table style="width: 100%;"> <tr> <td style="border: 1px solid black; width: 60px; height: 25px;"></td> <td style="width: 40px; text-align: right;">(36)</td> </tr> </table>		(36)	<div style="border: 1px solid black; min-height: 60px; padding: 5px;"> <p><i>Reasons for refusals:</i></p> </div>																						
	(36)																								
<p><b>Special events</b> IF THERE IS A SPECIAL EVENT ON DURING YOUR SHIFT PLEASE RECORD DETAILS OF NAME OF EVENT, TYPE OF EVENT AND ESTIMATED NUMBERS ATTENDING.</p> <div style="border: 1px solid black; height: 25px; width: 100%; margin-top: 5px;"></div>																									
<p><b>Comments on shift</b> PLEASE PROVIDE DETAILS OF ANY PROBLEMS ENCOUNTERED DURING YOUR SHIFT SUCH AS LACK OF VISITORS TO INTERVIEW, PROBLEMS WITH INTERVIEW LOCATION ETC.</p> <div style="border: 1px solid black; height: 60px; width: 100%; margin-top: 5px;"></div>																									

**Appendix 4 – Count sheet**

<b>FORESTRY COMMISSION VISITOR MONITORING WALES (014874) COUNT SHEET</b>												<b>OFFICE USE ONLY</b> (1-7)014874B (8-11) _ _ _ _																															
<b>Location Code</b> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> <td style="width: 20px; height: 20px; border: 1px solid black;"></td> </tr> <tr> <td style="text-align: center;">(12)</td> <td style="text-align: center;">(13)</td> <td style="text-align: center;">(14)</td> <td style="text-align: center;">(15)</td> <td style="text-align: center;">(16)</td> <td style="text-align: center;">(17)</td> <td style="text-align: center;">(18)</td> <td></td> </tr> </table>																(12)	(13)	(14)	(15)	(16)	(17)	(18)		<b>Counter (initials)</b> _____																			
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	Calm	1	2	3		Windy	(33)																																				
<b>Parked cars</b> IF YOU ARE AT A CAR PARK ENTRANCE (OFFICIAL OR UNOFFICIAL) PLEASE RECORD THE NUMBER OF CARS PRESENT AT THE START AND END TIMES.																																											
<b>Number of cars at start</b> <input style="width: 50px;" type="text"/>				<b>Number of cars at end</b> <input style="width: 50px;" type="text"/>																																							
(34) (35) (36)				(37)(38)(39)																																							
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<input style="width: 100%; height: 100%;" type="text"/>																																											
<b>WRITE IN TOTALS FROM COUNT SHEETS AT THE END OF 1 HOUR PERIOD (REMEMBER TO INCLUDE ANY CONTINUATION SHEETS USED) :</b>																																											
<b>ENTERING</b>							<b>LEAVING</b>																																				
Visitors							Visitors																																				
On foot	On bike	On horse	Staff	Dogs	Prams	Wheel-chairs	On foot	On bike	On horse	Staff	Dogs	Prams	Wheel-chairs																														
(40) (41)	(42) (43)	(44) (45)	(46) (47)	(48) (49)	(50) (51)	(52) (53)	(54)(55)	(56) (57)	(58) (59)	(60) (61)	(62) (63)	(64) (65)	(66) (67)																														

counter..... ID .....

**Appendix 5 - WAG woodland – Details of sampling, access points and recreation facilities.**

**Legend**

District

CM	Coed y Mynydd
CC	Coed y Cymoedd
L	Llanymddyfri
CG	Coed y Gororau

Population

Perceived level of population within 15km of the block relative to other blocks in that district (H=High, M=Medium, L=Low).

Usage

Perceived level of visitor usage relative to other blocks within that district (H=High, M=Medium, L=Low).

---

















**Appendix 6 – Example of forest block – Block 35, Llanymddyfri**



**FOREST DISTRICT LLANYMDDYFRI**  
**DISTRICT CODE 418**

**FOREST BLOCK 35**

**SCALE 1:50,000**

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Access point codes

- Official Car Park
- Unofficial Car Park
- Other Entrance
- Permeable Boundary

## **Appendix 7 - Confidence intervals for volume of visitors**

This survey builds on a methodology developed for the Forestry Commission by Cheltenham and Gloucester College of Higher Education which suggested the most efficient way of balancing the cost of data collection at a large number of forest entrances spread over a wide geographical area with data precision and accuracy. Forest blocks were stratified by level of usage and population density within 15km of the site, but there is still a large degree of variability within a given forest block, from highly developed facilities with car parking and visitor centres to remote access points. Using this methodology, factors affecting the precision of the estimates are: the sampling of a proportion of entrances to be used in the survey, the high variability of visitor numbers to entrances within a forest block and the relatively small number of hours sampling.

The precision of the estimates of the volume of visitors to WAG woodland given in Section B (see page 16) of the report can be calculated using information about the number of entrances sampled in the survey. The sampling error can be calculated and used to apply confidence intervals to the estimates.

### **Confidence intervals for estimates of total visits to all WAG Woodlands 2004**

	<b>Estimate of visits <math>\pm</math> 95% CI</b>
Coed y Mynydd	1,396,000 $\pm$ 972,000
Coed y Gororau	500,000 $\pm$ 217,000
Llanymddyfri	1,032,000 $\pm$ 438,000
Coed y Cymoedd	1,197,000 $\pm$ 1,146,000
<b>Total – Wales</b>	<b>4,123,000 <math>\pm</math> 1,581,000</b>

The table shows the range of uncertainty related to sampling a proportion of entrances to WAG woodlands. For Wales as a whole, the estimated volume will be in the range **2.5 to 5.7 million visits** to WAG woodland each year, at the 95% confidence interval. The large confidence intervals are indicative of the fact that the entrances do not contribute equally to the total number of people visiting WAG woodland - entrances range from highly developed facilities, with car parking and visitor centres, to remote rural access points.

Another source of sampling error arises from the fact that survey work was done at each entrance for a small number of time periods throughout the year. The survey design makes it difficult to quantify this sampling error and the table above does not take into account this element of uncertainty.

Although the range of uncertainty is high, the estimates published in this report are the best currently available for WAG woodland. FC Wales are planning to re-run the survey (possibly in 2007), using different sites. The data from the 2004 and subsequent surveys can then be combined to provide more accurate estimates of visitors to WAG woodland.



Document	
Last edited by	
Version	
Checked and approved	
Printed on	