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Research Report

Quality of the
Visitor Experience:
Grizedale 2013



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Natural Resources Wales

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Date: February 2014

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1. Executive summary

1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed; 14 per year (7 in each country). All selected sites in England are high usage, while sites in Wales consist of a combination of medium and high usage sites. In 2013, interviews were conducted at 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

This report summarises the findings from the 211 visitor interviews conducted at Grizedale in 2013. Throughout the report, comparisons have been made to the previous research conducted 2010, and the all England average (aggregated data from all 7 sites surveyed in 2013).

1.2 Grizedale

Grizedale Forest is a 24.47 km² area of woodland in the Lake District of North West England, located to the east of Coniston Water and to the south of Hawkshead. It comprises a number of hills, small tarns and the settlements of Grizedale and Satterthwaite.

The forest is a popular tourist destination, with colour coded way-marked footpaths, mountain biking, an aerial assault course, a 16 bed hostel, and a visitor centre with a children's playground, education centre, café and shop. There is also a Sculpture Trail.

Grizedale forest is also used for two rallies each year, the Malcolm Wilson Rally and the Grizedale Stages Rally.

1.3 Perceptions of the site

Perceptions of Grizedale as a place to visit were extremely positive; this was also the case across all the England sites, and in the previous research. In fact, nobody interviewed at Grizedale in 2013 gave a negative rating of the site.

Nearly half (45%) rated the site as 'excellent', which was consistent with the 2010 findings (45%), but slightly lower than the all England average (52%). A further 40% rated the site as 'very good' and 12% rated it as 'good'.

Similarly, ratings of how safe and welcoming the site was were also positive; over a third (35%) of visitors to Grizedale gave this measure an 'excellent' rating, with another 49% saying it was 'very good' and 15% rating it as 'good'.

When asked whether they would be likely to recommend Grizedale as a place to visit to a friend or relative (using a score of 0-10), scores for Grizedale, and all England sites were overwhelmingly positive. The average score for the site was 9.2 out of 10, just 0.2 less than the all England average of 9.4, but 0.1 greater than the average observed in 2010.

1.4 Strengths of the site

The aspect of the site liked by the highest proportions of visitors was the scenery, views and beauty (33%). However, this was much lower than the proportion recorded at Grizedale in 2010 (50%).

A third of visitors explained that they like the walks, paths and trails (33%), while 22% mentioned the peace, tranquillity and relaxation of the site. Around one in five visitors (18%) noted that the cycle trails or the opportunity to cycle were a favourite aspect, and a further 14% mentioned activities available for children.

1.5 Areas for improvement

While 42% of visitors claimed that there were things that could be done at Grizedale that would enhance their enjoyment of the site, there were no prevailing aspects that are in need of attention.

There were however calls for:

- Improved signage and maps (6%)
- Better parking (6%)
- More trails, paths or cycle tracks (2%)
- Easier or less challenging trails, paths and cycle routes (2%)
- More activities for children (2%)
- Better weather and more sunshine (2%)
- Improvements to the café and catering in general (2%)
- More or larger cycle racks, storage and bike washes (2%)
- Improvements to the toilet facilities (2%)

However, only very small numbers mentioned each of these, and overall, more than half of the visitors were completely happy about the site, making only positive comments (58%).

1.6 Visitor profile

The majority of visitors to Grizedale had visited the site before (62%). However, the proportion was slightly lower than the all England average of 76% who said they had visited the respective site before. This also showed a decline from the 75% of repeat visitors at Grizedale back in 2010. The lower proportion of repeat visitors was perhaps a reflection of the fact that almost half of those who visited Grizedale came as part of a longer holiday or visit (46%).

Visitors to Grizedale were most likely to be aged between 35 and 44 years (32%), and least likely to be aged 16 to 24 years (6%). This age profile was consistent with the all England average. Just over two in five (41%) of the visitors to the site were accompanied by children, and 34% had children living at home with them. These were both slightly smaller proportions than the all England averages where 45% had children with them at the site and 44% had children living at home with them. However, the proportion of males to females visiting Grizedale was consistent with the all England average with 47% being male and 53% female (compared to 46% and 54% respectively for the all England sample).

2. Introduction

2.1 Background

The woodland estate managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) covers some 105,000 hectares and 256,000 hectares respectively.

Each year in Wales, around 4 million visits are made to the estate including 0.5 million to sites with visitor centres. In England, around 40 million visits are made to the estate each year, including 3 million to sites with visitor centres.

The use and enjoyment of woodlands can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming woodlands provide an excellent setting for outdoor recreation such as walking, cycling and horse riding. Regular outdoor exercise lowers rates of obesity, cardiovascular disease, osteoporosis and type-2 diabetes as well as some cancers. It can contribute to a lifelong pattern of healthy living if encouraged amongst the young, and in the elderly it contributes to greater mobility and fewer injuries associated with ageing.

The experience of a natural environment and the opportunity for exercise can assist in treating people with mental health problems, in modifying anti-social behaviour in young children and adolescents, in supporting people dealing with stress and depression, and can also help to improve concentration in the workplace.

The provision of a quality visitor experience will help to encourage both repeat and new visitors. The quality of visitor experience depends not only on the facilities provided at a site (notice boards, playgrounds, toilets, car park, walking trails), but also on the 'sense of welcome' that the woodland provides. This 'sense of welcome' in turn depends both on the maintenance of the woodland (rubbish, dog dirt, brambles, mud) and also the nature of the woodland itself (light & open or dense & dark).

Maintaining or improving the quality of experience at NRW and FCE managed sites is part of a wide-ranging programme of work to encourage the development and promotion of woodland access throughout Wales and England with suitable infrastructure and well managed woodlands that feel safe and welcoming.

NRW and FCE have commissioned a variety of visitor surveys in recent years in relation to the usage of their forests and woodlands. The Quality of the Visitor Experience Survey has been conducted since 2006, but has been run in its current format since 2010. The main aims of the survey are:

- To provide information on the quality of visitor experience at each site
- Use a set of standard questions so that the quality of visitor experience at each site can be scored, benchmarked and tracked over time
- For sites in Wales, also use a set of tailored questions at each site to give information on how the visitor experience at that particular site could be improved.

2.2 Research programme

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed; 14 per year (7 in each country). All selected sites in England are categorised as being high usage, while sites in Wales consist of a combination of medium and high usage sites.

Table 1 below details the sites surveyed in 2013, along with the number of interviews completed at each.

Table 1: Interviewing sites and number of interviews conducted

England		Wales	
Site	No. of interviews	Site	No. of interviews
Alice Holt	241	Afan Forest Park (H)	192
Cannock Chase	223	Brechfa (M)	138
Cardinham Woods	237	Gwydyr (M)	147
Grizedale	211	Hafren (M)	130
Sherwood Pines	207	Moel Famau (M)	190
Wendover Woods	216	Newborough (H)	182
Westonbirt	210	Whitestone (M)	135
TOTAL	1,545	TOTAL	1,114

* H = High usage; M = Medium usage

Interviews are conducted face-to-face with visitors who are exiting the site or coming to the end of their visit, with interviewing points situated at key access points.

The core interviewing period will run from March to October each year. However, during 2013, interviewing was concentrated in August, September and October, with a small number of interviews conducted in July and November.

At Grizedale, interviewing took place between 31st July and 26th October 2013, and a total of 211 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Grizedale in 2013, and includes individual sites scores on key visitor measures. Throughout the report, comparisons have been made to the 'All England' figures (aggregated results from all 7 sites) and previous findings from the 2010 research (where applicable).

Results are presented as rounded percentages (no decimals), which may mean that some percentages do not add up exactly to 100%.

2.4 Data tables

Comprehensive data tables are available separately, and contain the following cross-breaks:

- Home region
- Home nation
- Age
- Ethnicity
- Gender
- Social class
- Group composition
- Ages of children
- Day trip vs. staying visitor
- First time vs. repeat visitor
- Limiting illness
- Quality of experience.

3. Visitor profile information

3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who are visiting Grizedale. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in England in 2013.

The gender profile of visitors to Grizedale was consistent with the all England sample, with slightly more females (53%) than males (47%) going to the site (54% female and 46% male for all England sites).

Visitors to Grizedale were most likely to be aged between 35 and 44 (32%), and least likely to be 16 to 24 years of age (6%). These proportions were consistent with the all England average where 33% were aged 35 to 44, and 6% were 16 to 24 years. Similarly, proportions in the other age categories were very similar, with slightly fewer Grizedale visitors being aged 65 and over (10%) than the all England average (12%) and slightly more being aged 25 to 34 (22% of Grizedale visitors v. 19% of all England sites). However, these differences were only small.

Three quarters of visitors to Grizedale were employed (75%), with 65% employed full-time and 12% part-time. Although the proportion of those employed was similar to the all England average of 71%, the number of visitors to Grizedale who worked full-time was greater (65% v. 55% of all England site visitors).

The socio-economic profile of visitors to Grizedale was skewed towards ABC1s (professionals and middle managers) who accounted for 80% of the sample. However, this was also the case across all the England sites (76%). Less than one in five of the visitors to Grizedale (19%) belonged to the C2DE social groups (skilled and semi-skilled manual workers and those receiving benefits).

Only a small proportion of visitors to Grizedale had a limiting illness (7%); this was consistent with the all England average of 5%.

The majority of visitors to Grizedale were white British (96%), with a small number of visitors (2%) describing their ethnicity as 'white other' (1%) or 'black, Asian, mixed race' (1%). These proportions were also consistent with the all England average – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2013

		Grizedale %	All England %
Gender	Male	47	46
	Female	53	54
Age	16 - 24	6	6
	25 - 34	22	19
	35 – 44	32	33
	45 – 54	20	19
	55 – 64	10	12
	65+	9	12
Social class	AB	45	40
	C1	35	36
	C2	15	17
	DE	4	7
	Refused	1	1
Working status	Full-time employee (30+ hours per week)	65	55
	Part-time employee (<30 hours per week)	12	16
	Self-employed	3	4
	Full-time education	3	3
	Unemployed	1	<1
	Permanently sick / disabled	1	1
	Retired	9	14
	Looking after home	5	7
Limiting illness	Yes – limited a lot	3	2
	Yes – limited a little	4	3
	No	92	94
Children in household	Yes	34	44
	No	64	56
	Refused	1	1
Ethnicity	White – British / Welsh / Irish	96	97
	White – Other	1	1
	Black / Asian / Mixed	1	2
	Refused	-	<1

Base: All visitors – Grizedale (211); All England (1,545)

3.2 Group profile

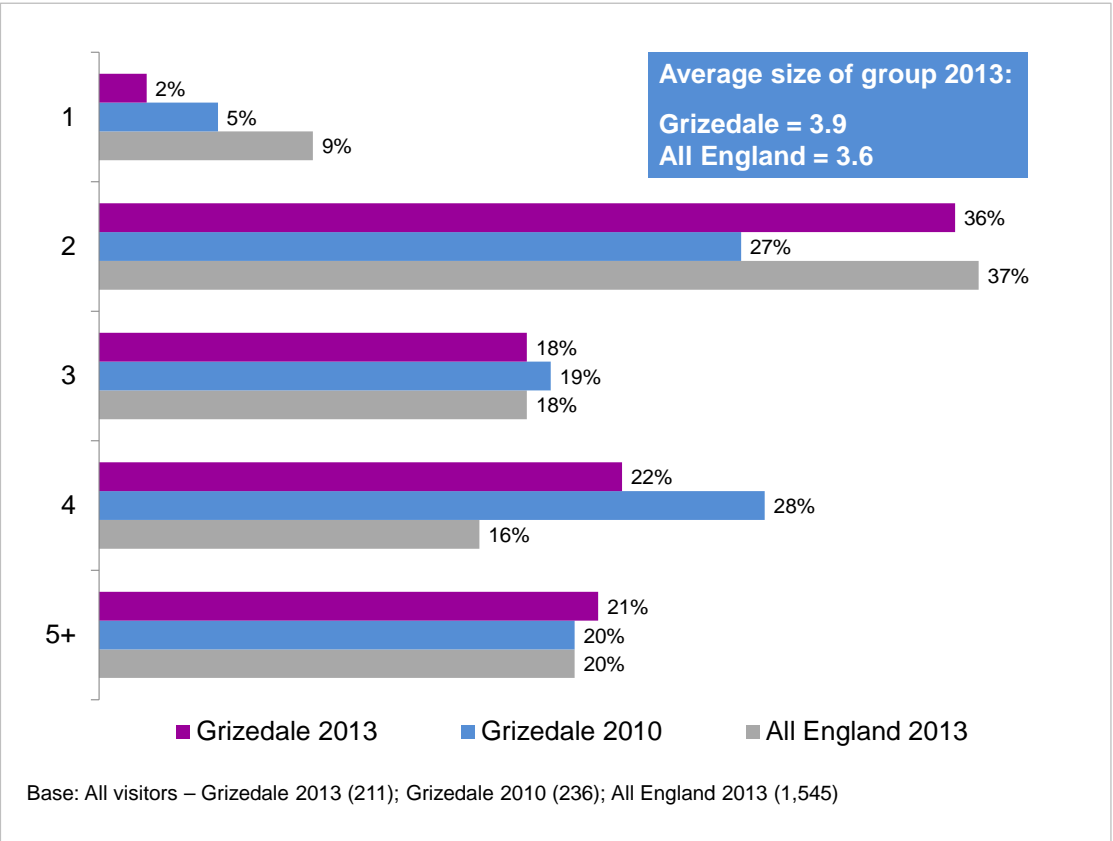
3.2.1 Size of group

The average group size visiting Grizedale is 3.9, which is slightly larger than the all England average of 3.6.

Just over a third of visitor groups coming to Grizedale consist of two people. This was consistent with the all England average, but a greater proportion than was observed in previous research conducted at the site in 2010 (27%). However, in 2010 28% of those visiting Grizedale were accompanied by three other people, whereas in 2013 the proportions of visitors within this category were slightly smaller (22%).

Only a very small proportion of visitors to Grizedale were alone (2%), and over half visit with two or more other people in their group (51%) – see Figure 1 below.

Figure 1: Q1. Total size of the group



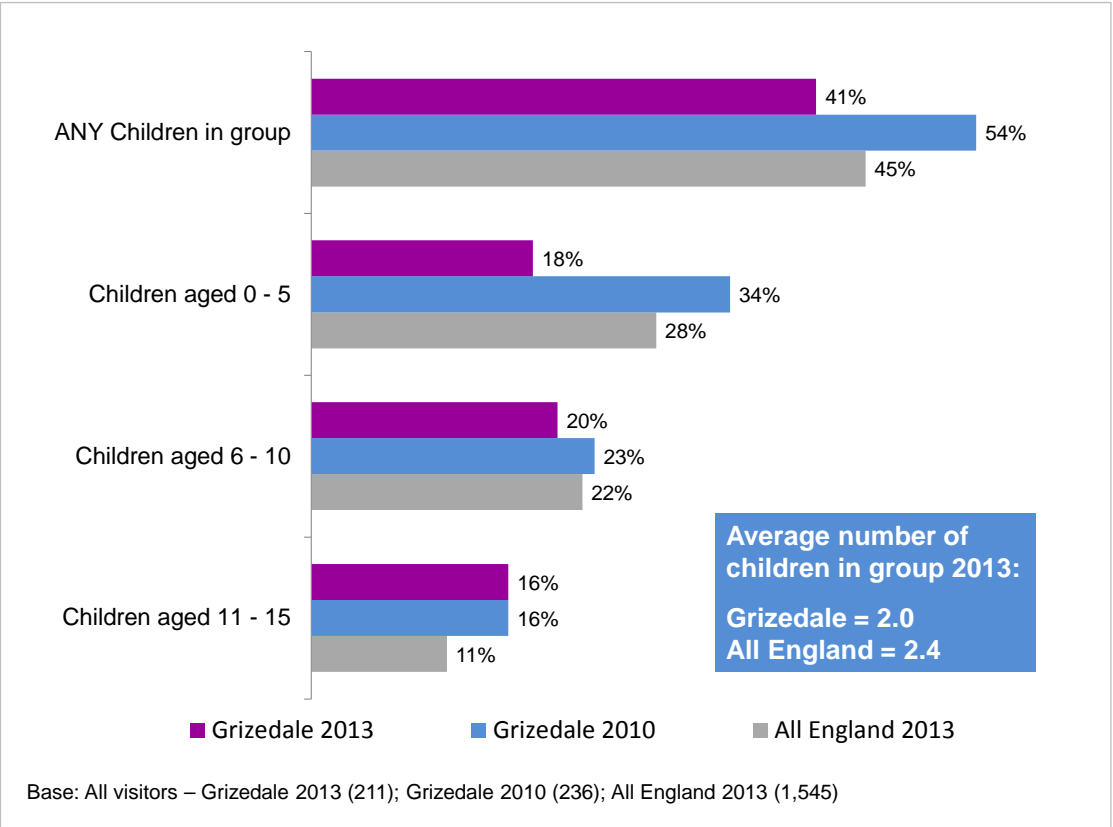
3.2.2 Composition of group

Just over two in five of the visitors to Grizedale were accompanied by children (41%), a smaller proportion than was observed in 2010 (54%) and a smaller number than the all England average (45%). Likewise, where groups did contain children, the average number per group was also lower than the all England average (mean of 2.0 children per group at Grizedale compared to an average of 2.4 across all England sites).

Children visiting the site were most likely to be aged 6 to 10 years (20%). This was similar to the findings of the 2010 research (23%). However, much smaller numbers of children aged 0 to 5 years were visiting the site in 2013 (18%) than were doing so back in 2010 (34%). In addition, the proportion of children in this age group visiting Grizedale was also smaller than the all England average (28%).

Compared to the all England average, Grizedale attracted slightly more 11 to 15 year olds (16% compared to 11% across all England sites), but the proportion remained consistent with that observed in 2010 – see Figure 2 below.

Figure 2: Q1. Composition of group



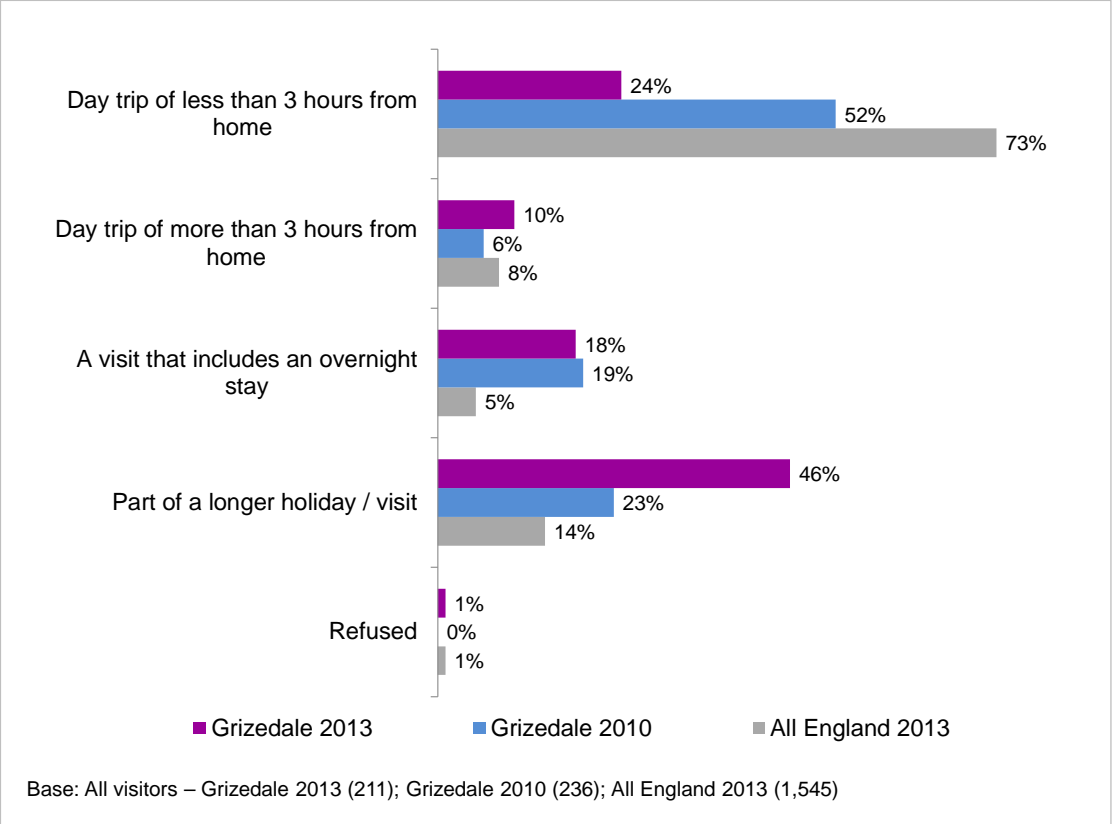
4. Profile of visit

4.1 Type of visit

Almost half of the visitors to Grizedale were coming as part of a longer holiday or visit (46%). This was a greater proportion than seen in the previous research (where 23% were coming as part of a longer holiday or visit), and was also significantly more than the all England average (14%).

Compared to 2010 figures from Grizedale, and the all England average, a much smaller proportion of visitors travelled less than three hours from home for a day trip to the site (24% in 2013, 52% in 2010 and 73% across all England sites in 2013). However, the proportion of those visiting as part of a day trip and travelling more than three hours from home remained fairly consistent – see Figure 3 below.

Figure 3: Q2. Type of visit



4.2 Visitor origin

Visitors were asked to provide their postcode in order to determine their area of residence.

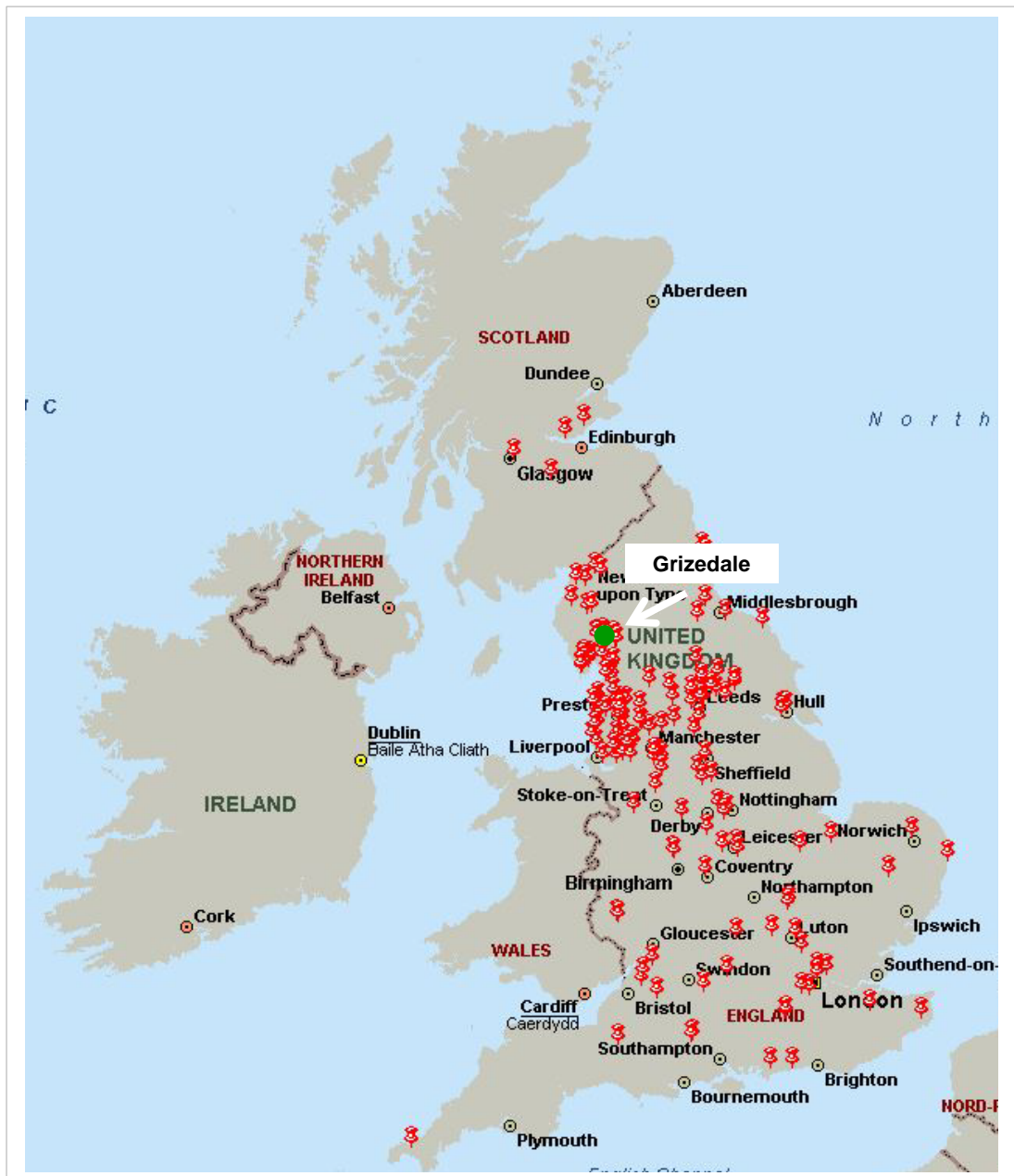
Almost half of the visitors to Grizedale lived in the North of England (47%), with a further 15% living in Yorkshire and Humberside. Reflecting the fact that quite a large number of visitors came to the site as part of a holiday, 11% lived in the East of England (inc. London), 8% came from outside of England and a further 10% came from the South West (5%) or South East (5%) – see Table 3 and Figure 4 below for more details.

Table 3: Visitor origin 2013

		Grizedale %	All England %
Home region	North	47	8
	Yorkshire & Humberside	15	4
	East Midlands	6	13
	West Midlands	3	12
	East of England (inc. London)	11	6
	South East	5	29
	South West	5	24
	Outside of England	8	3
Home nation	England	92	97
	Wales	-	1
	Rest of UK	2	<1
	Abroad	5	2

Base: All visitors – Grizedale (211); All England (1,545)

Figure 4: Map of Visitor Origin for Grizedale



4.3 Frequency of visits

4.3.1 First-time visitors

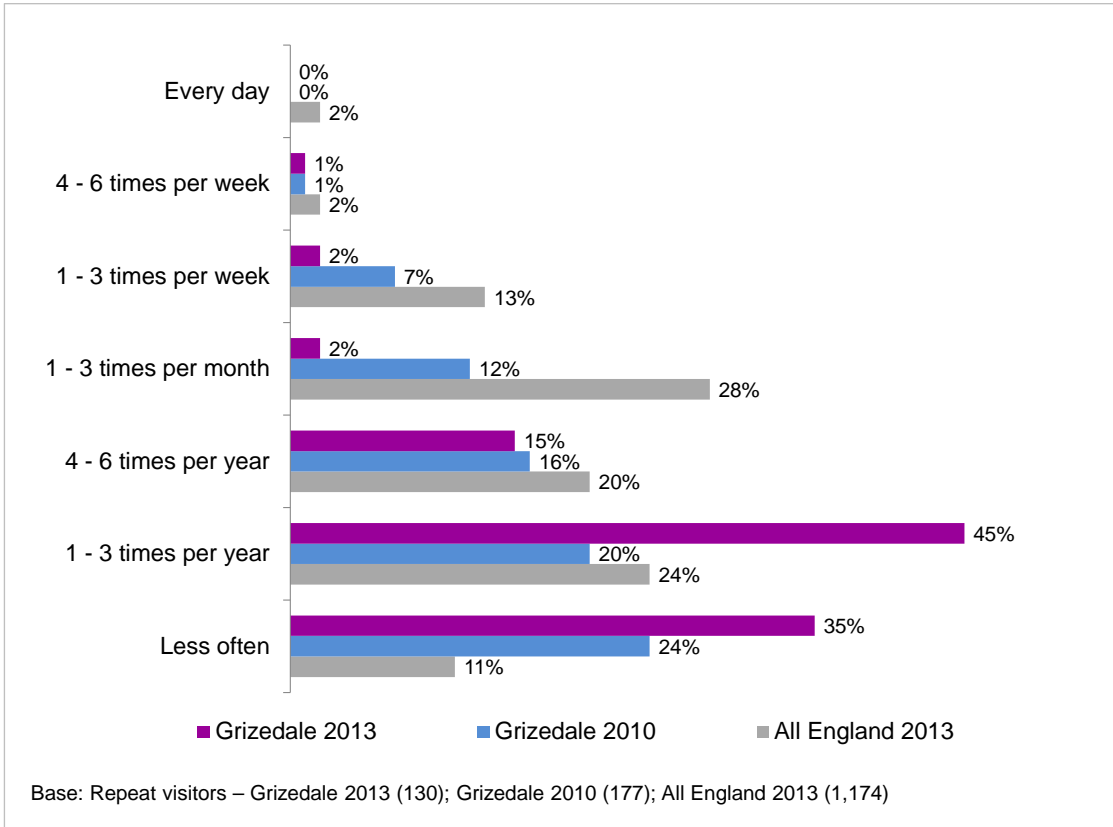
Nearly two in five visitors to Grizedale were first-time visitors (38%). This proportion is slightly higher than the all England average of 24% saying they have never visited the respective forest site before and is also higher than previous research at the site (25% in 2010).

4.3.2 Repeat visitors

Focussing on repeat visitors (62% of the sample), it can be seen that compared to the rest of England, repeat visitors tended to visit Grizedale less frequently. Just 3% of repeat visitors to the site visited at least once a week, this compared to 17% across all the England sites. On the contrary, more than two in five (45%) Grizedale repeat visitors said they had visited the site one to three times per year, compared to around a quarter (24%) of the all England sample.

In 2010, one in five (20%) of the repeat visitors came to the site at least once a month, in 2013 the proportion stood at 5%. Reinforcing that visitors are coming to the set less often, in 2013, 35% claimed they visit less than once a year. This compared to 25% who said this in 2010 – see Figure 5 below.

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

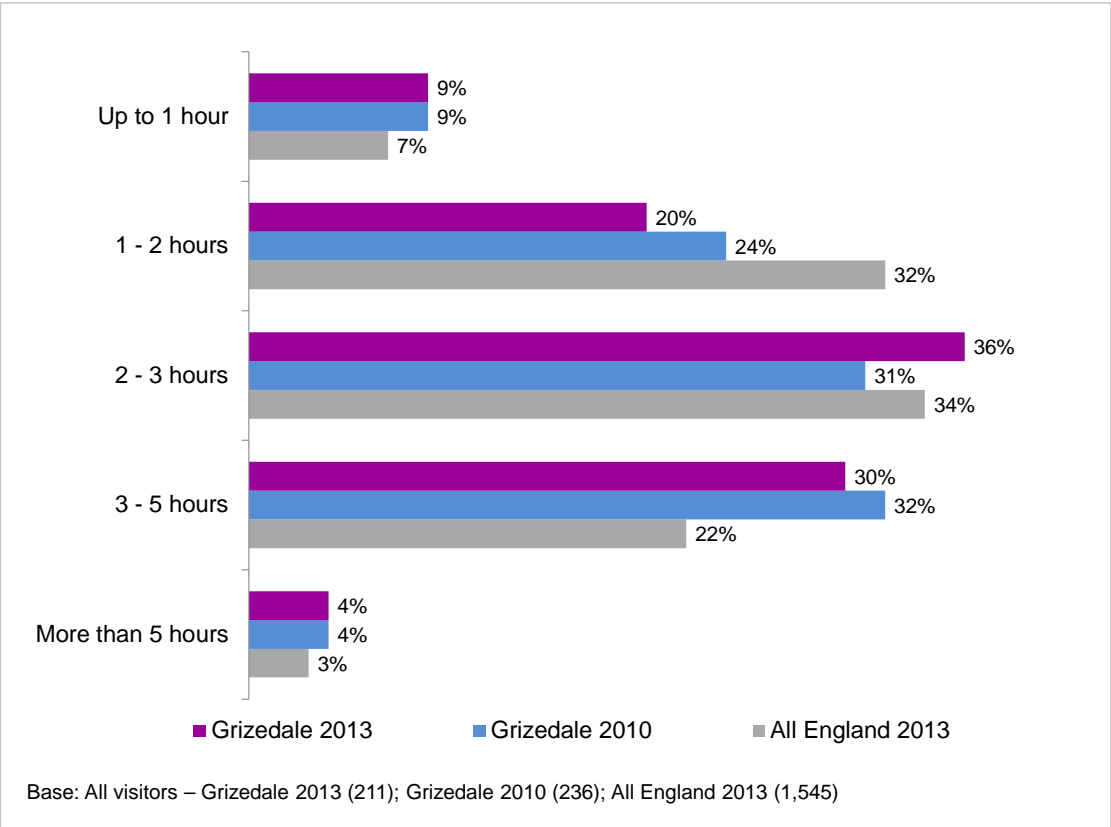


4.4 Length of visit

In 2013, visitors to Grizedale were staying at the site for about the same amount of time as they were back in 2010. In 2010, the average length of visit was 2 hours and 41 minutes, in 2013 visitors stayed on average for 2 hours and 43 minutes. The average length of visit across all sites in England was 2 hours and 29 minutes.

Less than one in ten visitors (9%) spent less than one hour at the site, the same proportion as in 2010. Likewise, as was the case in 2010, just 4% of visitors were staying for more than five hours. However, slightly more visitors spent between two and three hours at the site (36% in 2013, compared to 31% in 2010) – see Figure 6 below.

Figure 6: Q6. Approximate length of time spent at the site during visit



4.5 Activities undertaken

Visitors were presented with a list of activities and asked which ones they themselves, or others in their group, had either taken part in already, or intended to take part in during their visit. They were able to choose as many activities as applicable, and could choose activities of a similar nature (e.g. walking on trails and walking off trails).

Table 4 shows the combined figures for the following:

- Activities that visitors had already taken part in
- Activities that other members of the group had already taken part in
- Activities that visitors and other members of their group intended to take part in before they left the site.

The most popular activity undertaken at Grizedale was use of the café, restaurant or other catering facilities (55%). However, this was lower than the figure seen in previous research (64%) and slightly lower than the overall England average (57%).

Around three in five visitors to Grizedale walked throughout the site (59%), with walking along the sign-posted trails proving to be the most popular walking activity (44%). The proportion taking part in walking activities remained fairly consistent with 2010 findings (60%), but slightly less were walking on the sign posted paths (44% in 2013 compared to 49% in 2010) and slightly more were dog walking (19% in 2013 compared to 16% in 2010).

Over a third (38%) of Grizedale visitors take part in cycling activities, this was an increase from the figure observed in 2010 (36%) and was also a larger proportion than the all England average (29%).

The Go Ape! facility has also a popular activity, with 19% of visitors in 2013 having used it. However, a smaller proportion used the play area in 2013 than did so in 2010 (17% and 34% respectively) – see Table 4 overleaf for more details.

Table 4: Q4a/Q4b/Q5 - Activities taken / intend to take by all members of visitor group

	Grizedale 2013 %	Grizedale 2010 %	All England 2013 %
Cycling on forest roads, tracks or trails	32	14	16
Cycling / mountain biking off trails or tracks	20	29	19
TOTAL CYCLING	38	36	29
Walking on a sign-posted trail	44	49	37
Dog walking	19	16	23
Walking but not following sign-posts	10	13	20
TOTAL WALKING	59	60	64
Using the café / restaurant / other catering	55	64	57
Using the Visitor Centre / Shop	24	29	8
Go Ape!	19	-	9
Using the play area	17	34	28
Admiring the views	14	11	12
Picnic*	11	13	11
Photography	6	5	6
Seeing something in the forest	2	1	3
Running / jogging	2	1	1

Base: All visitors – Grizedale 2013 (211); Grizedale 2010 (236); All England 2013 (1,545)

* 2010 figure includes usage of Picnics and barbeques

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

Cycling was most popular amongst the visitors to Grizedale who were aged 16 to 34 years. Over half (54%) of this age group took part in some form of cycling whilst at the site, this compared to 38% of 35 to 54 year olds and 20% of those aged 65 and over.

Although male visitors were slightly more likely to take part in cycling activities (42% compared to 35% of females), women were more likely to use Go Ape! when visiting the site (22% compared to 16% of men).

Older visitors aged 65 and over were more likely to use the café, restaurant or catering facilities (68%) compared to those aged 35 to 54 year (49%). On the contrary, the 35 to 54 year old visitors were more likely to use the picnic facilities (15%) than the older age group (7%).

4.6 Length of time spent on activities

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

Overall, visits to Grizedale lasted on average 2 hours and 43 minutes; the average time spent on walking activities was 1 hour and 56 minutes (15 minutes more than the 2010 average), while the average time spent cycling was 2 hours and 35 minutes (19 minutes more than the 2010 average).

Therefore, while walking was a more popular activity than cycling, those choosing to cycle took part in this activity for much longer than those who walked around the site – see Table 5 below.

Table 5: Q7 – Time spent taking part in cycling and walking at Grizedale (Actual respondents only)

	Total duration of visit		Time spent on any walking		Time spent on any cycling	
	2013	2010	2013	2010	2013	2010
Up to 30 minutes	2	-	8	5	-	5
31 – 60 minutes	8	9	15	20	3	8
1 – 2 hours	20	24	35	45	25	31
2 – 3 hours	36	31	24	26	51	36
3 – 5 hours	30	32	16	4	25	15
5+ hours	4	4	-	1	-	4
AVERAGE	2 hrs 43 mins	2 hrs 41 mins	1hr 56 mins	1 hr 41 mins	2 hrs 35 mins	2 hrs 16 mins

Base: all visitors (211); respondents who walked (110); respondents who cycled (65)

4.7 Money spent in the area as a result of the visit

Visitors to Grizedale were asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Table 6 show the figures calculated by combining the data across all types of spending, and across both lone visitors and visitor groups. Please note that mean scores include 'zero' responses.

Half of the visitors to Grizedale claimed that they would be likely to spend up to £5 in the area as a result of their trip (50%), with another 37% saying they will spend between £6 and £10. Just over one in ten (11%) said they were likely to spend more than £10.

The average spent in the area as a result of visiting Grizedale was £7.50. This was considerably less than the figure observed in 2010 when the average amount spent by visitors was £18.63. However, it was more than the all England average which was just £6.13 – see Table 6 below.

Table 6: Q18a/Q18b – Average spend per person/group – frequency of spending within each price range

	Grizedale 2013 %	Grizedale 2010 %	All England 2013 %
£0 - £5	50	37	75
£6 - £10	37	26	15
£11 - £20	5	16	6
£21 - £50	6	13	3
£51+	-	8	<1
AVERAGE	£7.50	£18.63	£6.13

Base: All visitors – Grizedale 2013 (211); Grizedale 2010 (236); All England 2013 (1,545)

When examining individual types of spending, it can be seen that most people paid for food and drink purchased outside of any accommodation (89%), and most also spent money on parking (87%). The average spent on food and drink was £24.51, which was £11.68 more than the average in 2010 and £14.58 more than the all England average.

Nearly two in five visitors were likely to spend money on transport (39%), with the average amount spent being £7.11. A further 27% spent money on accommodation with the average spend being £36.60. This was a greater average than was observed in 2010 (£27.74), and considerably more than the overall England average spend on accommodation when visiting forest sites (£13.74).

An equal proportion of 18% of Grizedale visitors spent money on both admission fees to attractions and non-routine shopping – see Table 7 below.

Table 7: Q18a/Q18b – Average spend across individual items (includes zero spend)

	Proportion of visitors to Grizedale spending anything on this item %	Average £ Grizedale 2013	Average £ Grizedale 2010	Average £ All England 2013
Food and drink purchased outside any accommodation	89	24.51	12.83	9.93
Parking	87	5.98	4.54	2.73
Transport including petrol, taxis, public transport	39	7.11	7.17	4.66
Accommodation, including food and drink purchased there	27	36.60	27.74	13.74
Admissions fees to attractions	18	9.28	7.33	6.27
Non-routine shopping	18	2.22	Not asked	0.65
Hiring equipment e.g. boats, bikes or horses	16	8.10	5.36	1.72
Other miscellaneous items	5	0.65	0.28	0.83

Base: All visitors – Grizedale 2013 (211); Grizedale 2010 (236); All England 2013 (1,545)

5. Perceptions of the site

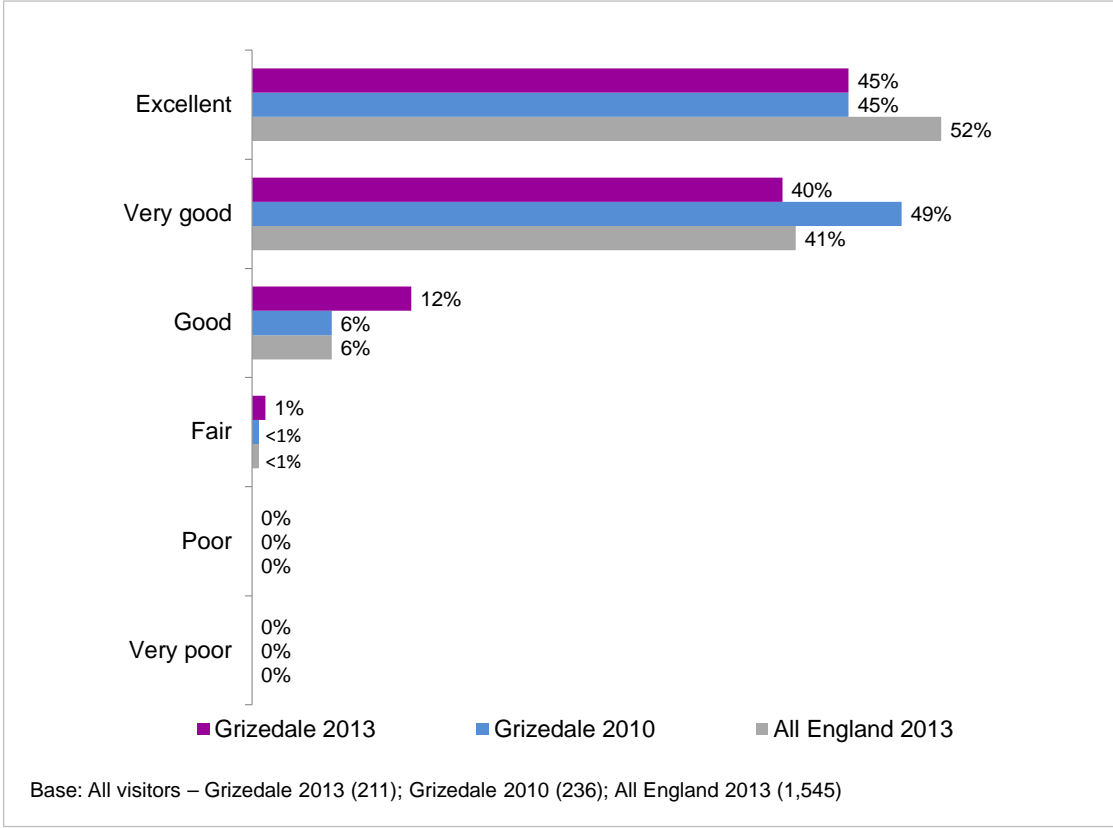
5.1 Overall rating of the site as a place to visit

Perceptions of Grizedale as a place to visit were generally very positive; this was also the case across all the England sites, and was noted in previous research. In fact, nobody interviewed at Grizedale in 2013 gave a ‘poor’ or ‘very poor’ rating of the site.

More than two in five (45%) rated the site as ‘excellent’, which was consistent with the findings of the 2010 research, but slightly lower than the all England average of 52%. A further 40% rated the site as ‘very good’, slightly lower than in 2010 (49%), but in line with the all England average of 41%.

Only 1% of visitors to Grizedale rated the site as ‘fair’ and none rate the site any lower than this – see Figure 7 below.

Figure 7: Q16. Rating of the site as a place to visit



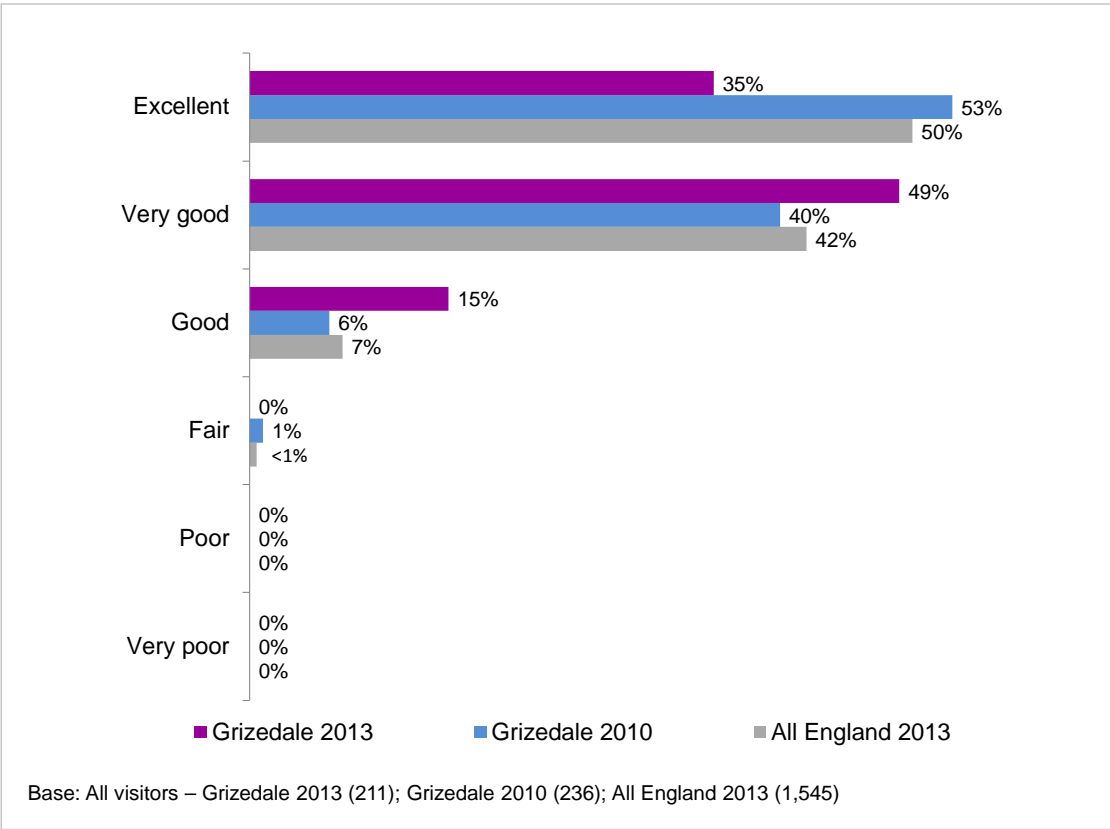
5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming the site was were also positive; again this was also seen across all England sites, and was seen in previous research.

Although none of the visitors to Grizedale rated how safe and welcoming it is in a negative way, fewer rated it as ‘excellent’ as did so in 2010. Just over a third (35%) of visitors gave an ‘excellent’ rating, whereas 53% did so in 2010. However, a greater proportion of visitors rated how safe and welcoming the site was as ‘very good’ (49% compared to 40% in 2010) or ‘good’ (15% compared to 6% in 2010) or ‘good’ (15% compared to 6% in 2010).

As is the case with the rest of the England sites, none of the visitors to Grizedale gave a negative rating – see Figure 8 below.

Figure 8: Q12. Rating of the site in terms of how safe and welcoming it feels



Visitors aged 16 to 34 were most likely to give an ‘excellent’ rating on the safety of the site (42%), whereas those aged 35 to 54 were least likely to do so (31%).

Those visitors who were able to rate the site in terms of how safe and welcoming it felt were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the site. Table 8 below details the comments provided by 2% or more of the sample at Grizedale. The table shows the responses received from those visitors giving a positive rating (excellent, very good, good) for both Grizedale and all England sites. In the case of Grizedale, this was **all** visitors (209).

The main reason given was that the site was clean, tidy, well-maintained and litter free (17%), which was slightly higher than the all England average (15%).

Around one in six visitors (15%) say that the site was a safe environment generally (for all people), and the same proportion said there were a good provision of paths / trails and tracks. Slightly fewer mentioned the site being well signposted, with good maps and information boards (14%), or that it was well laid out and organised (13%).

One in ten visitors (10%) explained that the reason for their positive rating was that they found the site peaceful, pleasant, tranquil or relaxing. Again the same number of visitors mentioned that there was plenty to do (10%) or that it was a good place for kids to play (10%) – see Table 8 overleaf for more details on the comments provided.

Table 8: Q13 – Reasons for giving a positive rating on how safe and welcoming the site feels – main mentions

	Grizedale 2013 %	All England 2013 %
Clean / tidy / well-maintained / litter-free	17	15
Safe environment generally for all people	15	17
Good provision of paths / trails and tracks	15	7
Well signposted / good maps / info boards	14	13
Well laid out / well organised / set-up	13	12
Good quality facilities / amenities	11	8
Peaceful / pleasant / tranquil / relaxing	10	9
Good place for the kids to play / run around / safe for the kids	10	15
Plenty to do / has everything you want	10	5
Friendly / helpful staff / rangers	9	7
General positive comments	8	12
The scenery / views / beautiful environment	7	7
Away from roads / no cars / cars drive slowly	4	5
Good car parking	4	6
People are friendly / no jobs	4	8
Good café / catering	4	3
Good toilets / plenty of toilets	3	2
Never had any problems	3	4
Fresh air / open space	2	6
Plenty of staff / rangers	2	2

Base: Visitors rating the site as excellent, very good or good – Grizedale 2013 (209); All England 2013 (1,528)

5.3 Recommending the site as a place to visit

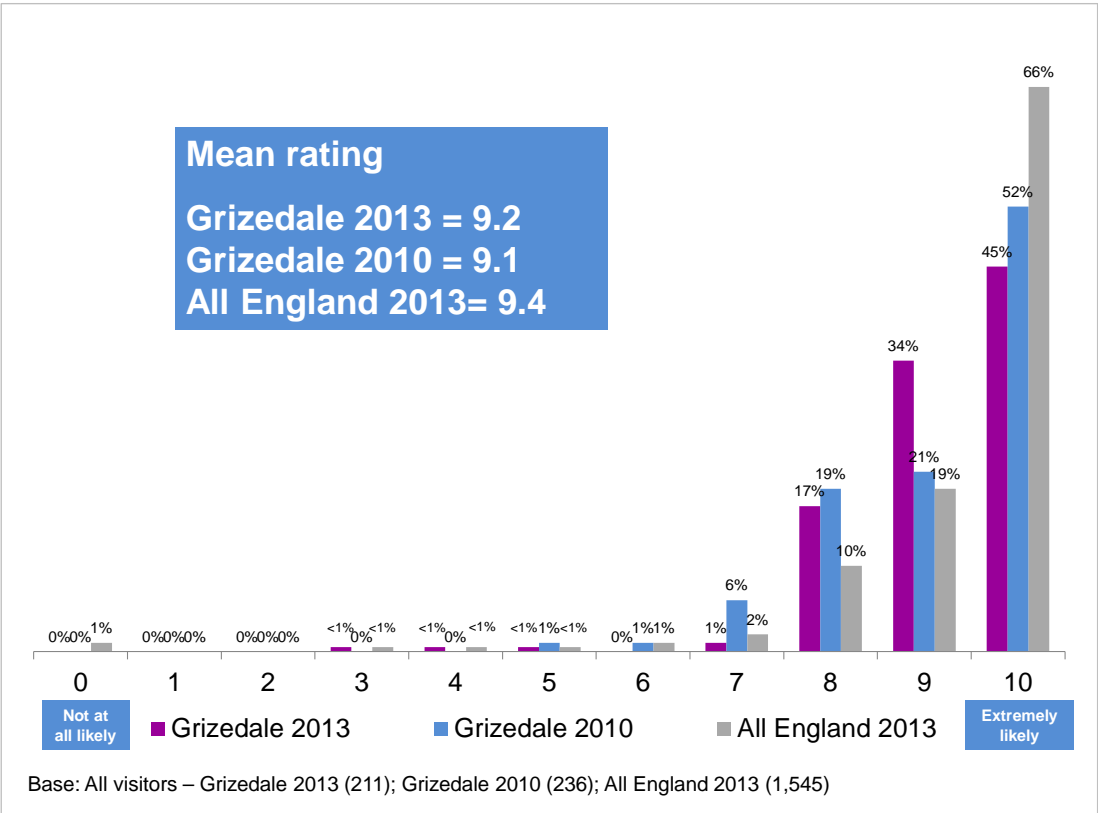
Visitors were asked whether they would be likely to recommend Grizedale as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'Not at all likely' and 10 equalled 'Extremely likely'.

Scores for Grizedale, and all England sites in general, were overwhelmingly positive; less than 2% of visitors give a rating of 7 out of 10 or less.

More than two in five (45%) gave a rating of 10, which was less than the findings from the 2010 research (52%) and less than the all England average (66%). However, more rated their likeliness to recommend as 9 out of 10 in 2013 than did so in 2010 (34% and 21% respectively).

The average score for Grizedale in 2013 was 9.2 out of 10 (0.2 less than all England sites), while in 2010 it was 9.1 (increase of 0.1) – see Figure 9 below.

Figure 9: Q17. Likelihood of recommending the site as a place to visit



Although there was not much variation between different groups of visitors, those visitors with children were more likely to rate their likeliness to recommend with a 10 out of 10 (55%) than those who were in adult only groups (39%).

Results can be analysed further by using a Net Promoter Score (NPS), which divides customers into three types:

- Promoters (loyal enthusiasts) - score of 9-10
- Passives (satisfied but unenthusiastic) – score of 7-8
- Detractors (somewhat less satisfied) – score of 0-6.

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Grizedale was 78, which was 8 points higher than the score of 70 seen in 2010, but lower than the all England score of 84.

5.4 Favourite things about the site

Visitors to Grizedale were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 9 below (compared to the previous research and the all England average).

The scenery, views and beauty of the site were the most popular aspect mentioned by visitors (33%). Although this proportion was consistent with the all England average (32%), it was much lower than the 2010 findings for the site (50%). Similarly, fewer visitors to Grizedale mentioned that they liked the peace, tranquillity or relaxation of the site (22%) than was observed for the all England sample (33%).

With walking being a popular activity participated in by visitors, it was perhaps not surprising that the walks, paths and trails were also mentioned by a third (33%) of the visitors as being one of their favourite aspects. However, once again this was similar to the all England average of 35%, but a slightly smaller proportion than observed in the Grizedale research conducted in 2010 (38%).

Around one in five visitors (18%) noted that the cycle trails or opportunity to cycle were a favourite aspect of the site, and around one in six (14%) mentioned the activities for children – see Table 9 overleaf for more details of the aspects of the site most liked by visitors.

Table 9: Q9 – Favourite things about the site

Activities	Grizedale 2013 %	Grizedale 2010 %	All England 2013 %
Scenery / views / beautiful	33	50	32
Walks / paths / trails	33	38	35
Peace / tranquillity / relaxation	22	26	33
Cycle trails / opportunity to cycle	18	32	24
Activities for the children	14	28	22
Fresh air / being outside	6	20	23
Opportunity to spend time with family / friends	5	11	7
Exercise / keeping fit	5	14	14
Lots to see and / or do	5	11	8
Good on-site facilities	5	14	11
Go Ape!	5	4	1
Like forests / trees / variety of trees	4	11	17
Café / restaurant	4	-	7
Play area	4	-	3
Sculptures / art	4	-	1
Clean / well looked-after	4	7	11
Close to home / convenient	3	5	12
Safe environment	3	5	8
Been here before / wanted to come again	2	9	6
Well laid out / good layout	2	-	1
Ideal for dogs / dog friendly / safe for dogs	2	-	3

Base: All visitors – Grizedale 2013 (211); Grizedale 2010 (236); All England 2013 (1,545)

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

- As might be expected, visitors with children were more likely to mention the activities for children (28%) than those without (5%)
- On the contrary, those without children in their group were slightly more likely to mention the cycle trails and opportunity to cycle (22%) than those with children (13%)
- First time visitors were more likely to mention the scenery, views and beauty of the site (42%) than those who have visited the site before (28%).
- Compared to visitors classified as ABC1s, more C2DEs mentioned the peace, tranquillity and relaxation of the site (22% of C2DEs compared to 15% of ABC1s)

5.5 Suggested improvements to the site

Visitors were asked if there was anything that would enhance their enjoyment of the site, and if anything interfered with their enjoyment of the site. Again, these questions were unprompted and visitors could mention more than one improvement or issue.

Turning firstly to what would enhance their enjoyment of the site; over half (58%) of the visitors to Grizedale could not think of anything that would add to their enjoyment and only made positive comments. This was fairly consistent with the all England average of 55% of visitors who only said positive things about the respective sites they had visited.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 10 below outlines the comments that were made by 2% of the sample or more.

Just over one in twenty visitors (6%) wanted the signs and maps of the site to be improved, with the same proportion mentioning improved parking. Other aspects mentioned by just 2% of visitors included: more trails, paths and cycle tracks; easier or less challenging trails, paths and cycle routes; longer trails; more activities for children; better weather; improvements to the café of catering facilities; and more or larger cycle racks, storage and bike washes – see Table 10 overleaf.

Table 10: Q10 – What would enhance enjoyment of site – main mentions

	Grizedale 2013	All England 2013
	%	%
Nothing / general positive comments	58	55
Improve signage and maps	6	4
Better parking	6	6
More trails / paths / cycle tracks	2	4
Easier / less challenging trails, paths and cycle routes	2	1
Longer trails / more challenging trails, paths and cycle routes	2	2
More activities for children / more play areas	2	4
Better weather! / more sunshine	2	1
Improve café / improve catering in general	2	4
More / larger cycle racks / storage / bike wash	2	1
Improve toilets / more toilets / shower facilities	2	5

Base: All visitors – Grizedale 2013 (211); All England 2013 (1,545)

When asked if there was anything that had interfered with their enjoyment of the site, almost two thirds (65%) report nothing. Although this is a relatively high proportion, it is lower than the all England average of 81%.

The most common factor interfering with visitor enjoyment was the cost of car parking. This was mentioned by nearly one in ten visitors (8%), a greater proportion than was observed across the all England sample (2%).

Mentioned by around one in twenty visitors, poor weather (6%), unclear signs or maps (5%), and problems with the car park (5%) were some of the main factors interfering with enjoyment at the site – see Table 11 below for more details

Table 11: Q11 – What interfered with enjoyment of site – main mentions

	Grizedale 2013 %	All England 2013 %
Nothing	65	81
Car parking expensive	8	2
Poor weather	6	3
Signs unclear / need better signs / more maps	5	2
Problems with car park (e.g. too few spaces, problems with barriers and ticket machines)	5	1
Poor service in the café	2	1

Base: All visitors – Grizedale 2013 (211); All England 2013 (1,545)

6. Site facilities

6.1 Importance of site facilities

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

Reflecting the fairly large number of visitors who participated in walking activities at the site, the choices of paths for walking were mentioned as an important aspect by the highest proportion of visitors (39%). This figure was slightly higher than that observed in 2010 (36%) and was also higher than the all England average (32%).

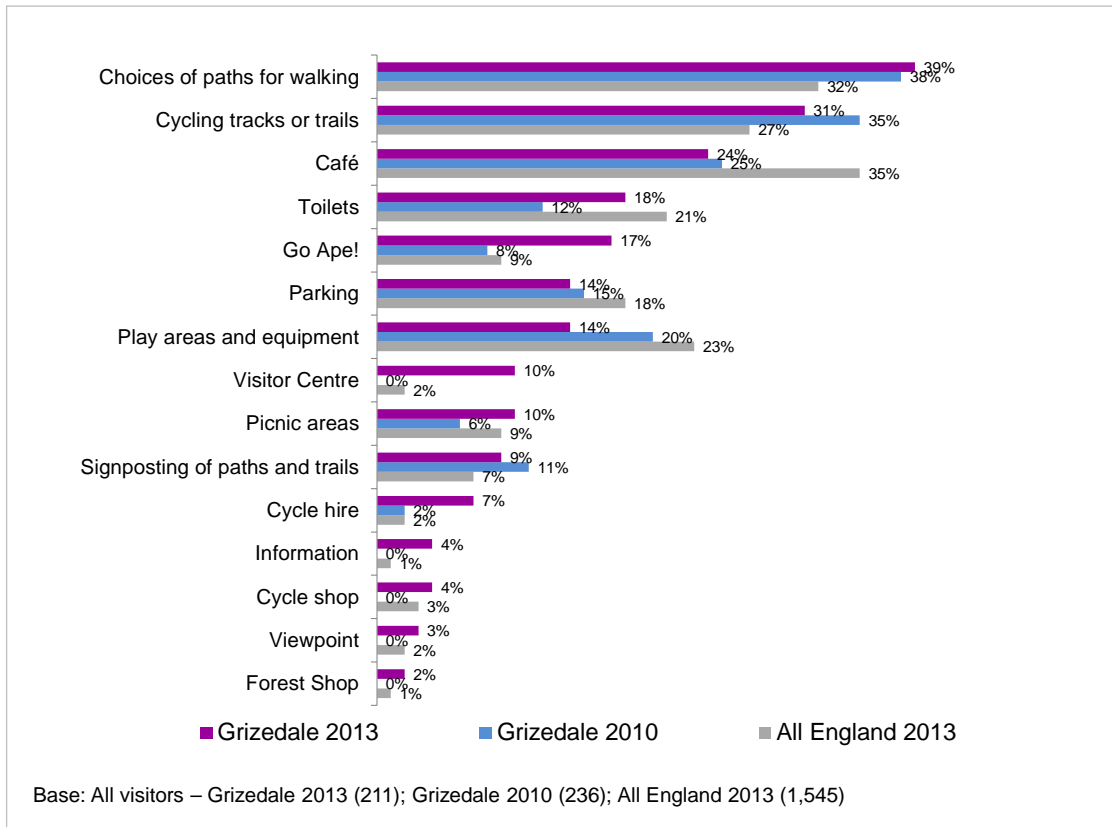
Although the cycling tracks and trails were also deemed important by quite a large number of visitors (31%), and even more so than the all England average (27%), the proportion mentioning this in 2010 was slightly greater (35%).

Mentioned by around a quarter of visitors (24%), the café is also an important facility when deciding whether to visit the site. However, this was more likely to be mentioned by the all England sample (36%).

Remaining fairly consistent with the all England average, 18% of visitors mentioned toilets as an important facility (21% across all England sites).

The relative importance of the Go Ape! facility had more than double since 2010 (17% in 2013 compared to 8% in 2010) – see Figure 10 overleaf for more details.

Figure 10: Q14. Importance of different facilities in deciding to visit the site



6.2 Facilities used

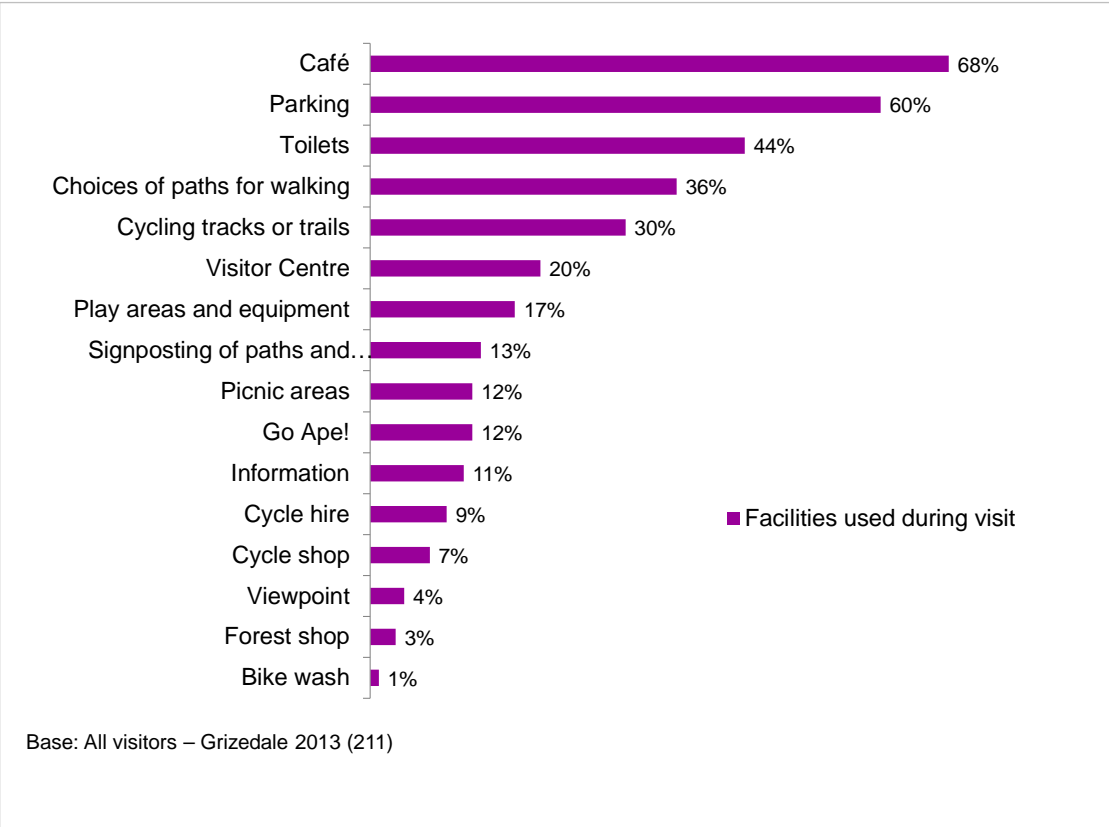
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The café was used by the highest proportion of visitors (68%), followed by parking facilities (60%). Just over two in five visitors mentioned that they had used the toilets at the site (44%).

Just over a third of visitors used the choices of paths for walking (36%) and 30% used the cycling tracks or trails at Grizedale. The visitor centre was used by 20% of visitors, with slightly fewer having used the play areas and equipment (17%).

Slightly more than one in ten of the visitors used the paths and trails that are signposted (13%), and similar proportions used the picnic areas (12%), Go Ape! facility (12%) or information (11%) – see Figure 11 for other facilities being used at Grizedale.

Figure 11: Q15a. Facilities used at Grizedale 2013



Some sub-group differences were observed; 73% of visitors who were in adult only groups used the café, while 60% of those with children did so. On the contrary, those with children were more likely to have used the parking facilities (66% compared to 66% of visitors with no children in their group).

Younger visitors were also less likely to use the parking facilities at Grizedale, with just 39% of 16 to 34 year olds doing so compared to 69% of 35 to 54 year olds, and 66% of those aged 55 and over.

Those belonging to the C2DE social groups were more likely to use the picnic areas (20%) and less likely to use the café (51%) compared to those belonging to the ABC1 groups (11% and 71% respectively).

None of the visitors aged 65 and over interviewed at Grizedale mentioned using the cycle tracks or trails.

6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by more than 10% of the overall sample at Grizedale have been detailed in Figure 12 below.

Ratings of all facilities used were overwhelmingly positive, with very few visitors giving any of the facilities a poor rating, and the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

The facility that received the highest score was Go Ape!; 36% of the visitors using this rate it as ‘excellent’, with another 48% rating it as ‘very good’ and 16% rating it as ‘good’. A third (33%) of those using play areas and equipment rated these facilities as ‘excellent’, and over half rated them as ‘very good’. The lowest rating for these facilities was ‘fair’, but this was only a response given by 3% of those who use them.

The facilities receiving the lowest ratings were the information point (8% saying ‘excellent), toilets (8% saying ‘excellent’) and the parking (5% saying ‘excellent’). Saying that, most visitors who had used these facilities were still positive about them to a certain extent – see Figure 12 below for more details of the rating given for each activity.

Figure 12: Q15b. Rating of Grizedale site facilities (where used) 2013

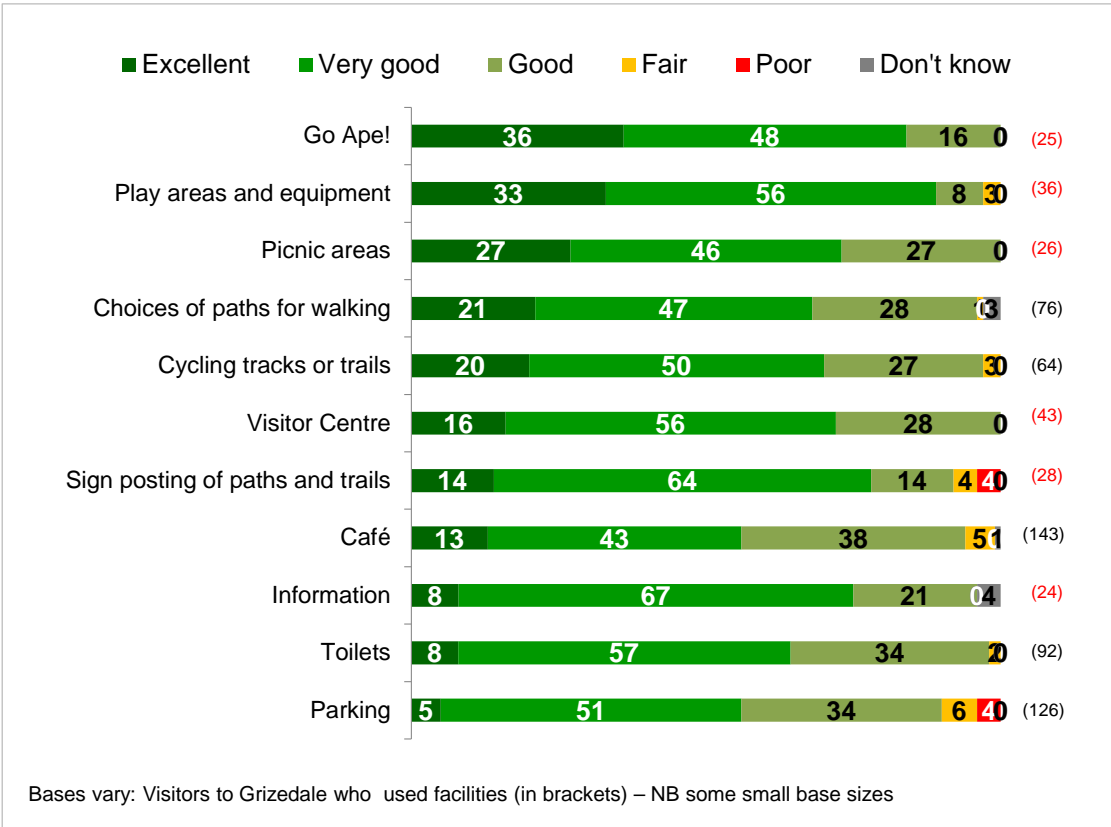


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2013 compared to 2010.

Although the ratings were generally very positive, since 2010, the proportion giving an 'excellent' rating fell for many of the facilities. The most significant decreases seen were for the cycling tracks or trails and toilets (12% and 11% decreases respectively between 2010 and 2013).

The three facilities where more visitors rated them as 'excellent' in 2013 compared to 2010 included: picnic areas, choices of paths for walking, and play and equipment. However, picnic areas observed the most significant increase of 13% - see Table 12 below for more details.

Table 12: Q15b – Proportions rating facilities at Grizedale as 'Excellent' 2013 vs. 2010

Facilities	Grizedale 2013 %	Grizedale 2010 %	% change
Go Ape!	36	43	-7
Play areas and equipment	33	30	+3
Picnic areas	27	14	+13
Choices of paths for walking	21	17	+4
Cycling tracks or trails	20	32	-12
Visitor Centre	16	-	-
Sign posting of paths or trails	14	17	-3
Café	13	17	-4
Information	8	12	-4
Toilets	8	19	-11
Parking	5	10	-5

Bases vary: visitors using each facility

7. Information about sites

7.1 Sources used to plan visit

Visitors were asked where they found out about Grizedale as a place to visit. This question was prompted and visitors could mention as many sources of information as were applicable.

Amongst first time visitors to Grizedale, 30% said they had always known about the site, which was a much larger proportion than observed in 2010 (12%). Google and the internet were also mentioned by a similar proportion of 27%, which again is a considerable increase since 2010 when only 14% found out about the site in this way.

Although word of mouth was by far the most frequently mentioned source of information for first time visitors in 2010 (mentioned by 60%), only just over one in five mention this method in 2013 (22%).

Looking at repeat visitors, the vast majority said that they have been there before, or they have always known about it (79%). This was fairly consistent with the 2010 findings (83%), but higher than the all England average of 70% - see Table 13 for more details.

Table 13: Q8 – How found out about the site as a place to visit

	First Time Visitors			Repeat Visitors		
	Grizedale 2013 %	Grizedale 2010 %	All England 2013 %	Grizedale 2013 %	Grizedale 2010 %	All England 2013 %
Always known about it / been before	30	12	20	79	83	70
Google / internet	27	14	19	8	4	4
Word of mouth	22	60	43	10	11	25
Leaflet	19	9	6	5	-	2
Tourist Board	9	2	3	1	1	1
Book / guide book	5	-	2	1	-	1
Forestry Commission Website	4	-	4	2	-	2
Map	2	2	2	3	2	1
TV	2	-	1	1	-	<1

Bases vary: First time vs. repeat visitors

7.2 Visiting other sites

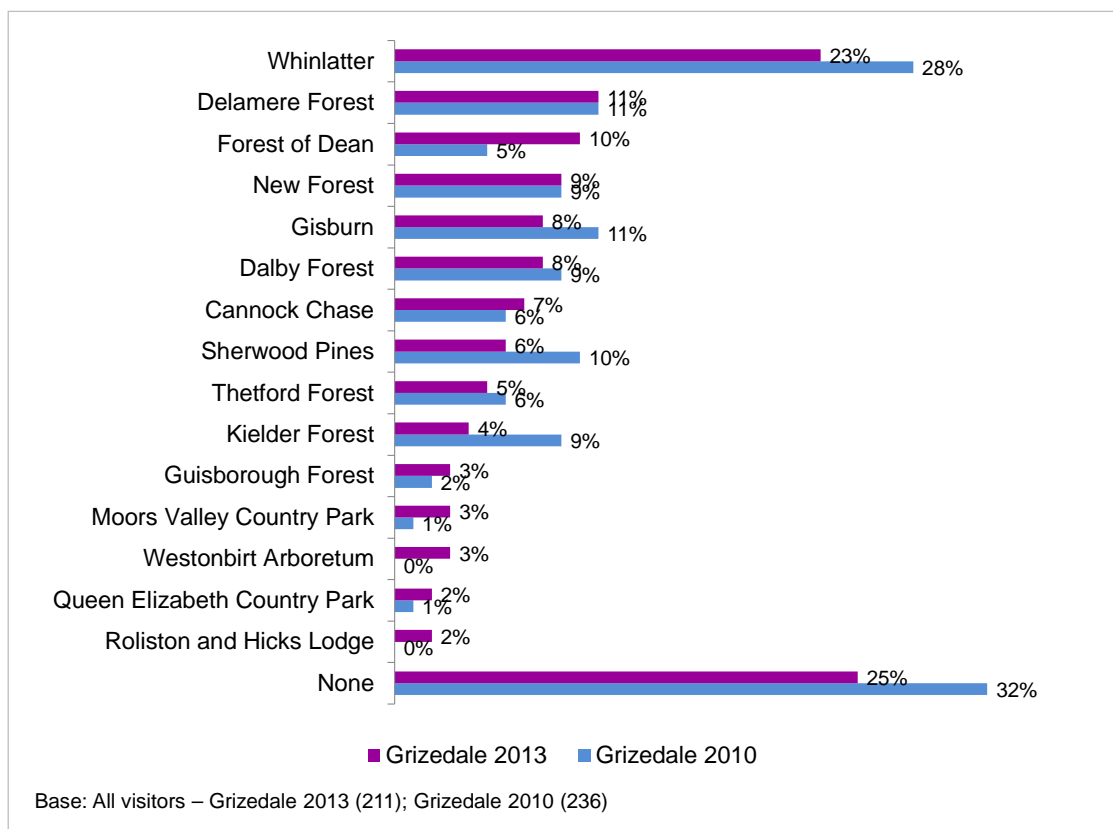
Visitors to Grizedale were presented with a list of FCE managed forests and woodlands, and asked whether they had visited any of these other sites in the last 12 months. Just over half had visited at least one other site (54%), and those mentioned by 2% of the sample or more are detailed in Figure 13 below, along with the proportions mentioning each site in 2010.

Whinlatter was mentioned by the highest proportion of visitors to Grizedale (23%), but the proportion visiting both sites in 2010 was slightly higher (28%).

Around one in ten Grizedale visitors also visited Delamere Forest (11%), the Forest of Dean (10%) and the New Forest (9%). These are all similar proportions to 2010, apart from the Forest of Dean where only 5% of Grizedale visitors also visited that site in 2010.

Slightly less than one in ten had visited Gisburn (8%), Dalby Forest (8%) or Cannock Chase (7%). However, as seen in Figure 13 below, visitors to Grizedale had been to a variety of other sites across England in the last year. This was reflective of the fact that a lot of visitors travelled quite a distance to come to the site.

Figure 13: Other sites visited in the last 12 months



8. Discovery passes

8.1 Uptake and interest in season tickets and annual Discovery Passes

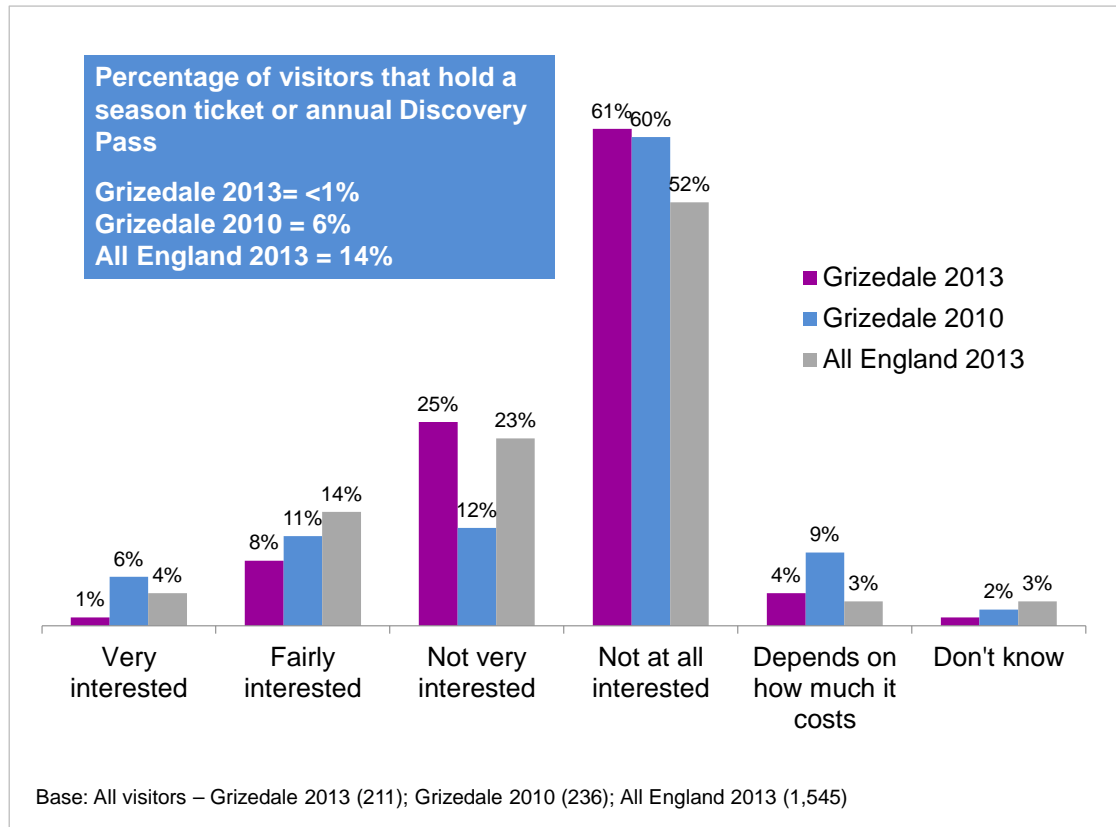
Only one of the visitors interviewed at Grizedale already held a Season Ticket or Annual Discover Pass (<1%). This was a much smaller proportion than the all England average of 15%, and was also less than the figure observed in 2010 (6%).

All visitors (whether they currently hold a pass or not) were then asked how interested they would be in purchasing one in the future. They were prompted with the price (approximately £70) and the benefits (free parking and discounts to FCE sites).

Levels of interest in purchasing an Annual Discover pass were very low, with less than one in ten saying they are either 'very interested' or 'fairly interested' (1% and 8% respectively). This level of interest was not only lower than the all England average (4% are 'very interested' and '14% are 'fairly interested'), but was also much lower than the findings of the 2010 research at Grizedale (6% were 'very interested' in the pass, and a further 11% were 'fairly interested').

Over three in five visitors (61%) to Grizedale said they were 'not at all interested' in the Annual Discovery Pass. Although this was consistent to the 2010 findings (60%), it was higher than the all England average – see Figure 14 overleaf.


Figure 14: Current usage and levels of interest in season tickets and annual Discovery Passes



Looking at the different groups of visitors there were very little variations in the levels of interest in purchasing the Annual Discovery Pass.

Appendix I

Questionnaire

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

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

ASK ALL

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

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

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

SHOWCARD A

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

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

(18)

1
2
3
4
5

SHOWCARD B

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

SINGLE CODE

1 st visit	Every day	4-6 x per week	1-3 x per week	1-3 x per month	4-6 x per year	1-3 x per year	Less often	DK
1	2	3	4	5	6	7	8	9

(20)

SHOWCARD C

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

RECORD IN COLUMN A - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

Q4b And which of these activities have other members of your group taken part in during your visit here today?

RECORD IN COLUMN B - CODE ALL MENTIONED

ASK ALL - SHOWCARD C AGAIN

Q5 And which of these activities are you (**IF PART OF GROUP:** or other members of your group) planning to take part in during your visit here today?

RECORD IN COLUMN C - CODE ALL MENTIONED

ACTIVITY		Column A Q4a (21-24m)	Column B Q4b (29-32m)	Column C Q5 (37-40m)
1	* Cycling on forest roads, tracks or trails	1	1	1
2	* Cycling / mountain biking off trails or tracks	2	2	2
3	* Dog walking	3	3	3
4	* Walking on a sign-posted trail	4	4	4
5	* Walking but not following sign posts	5	5	5
6	* Orienteering	6	6	6
7	Using the café / restaurant / other catering	7	7	7
8	Using the visitor centre / shop	8	8	8
9	Using the play area	9	9	9
10	* Running / jogging	A	A	A
11	Nature / natural history visit	B	B	B
12	Bird watching	C	C	C
13	Photography	D	D	D
14	Motor sports	E	E	E
15	Educational visit	F	F	F
16	* Horse riding / pony trekking	G	G	G
17	Picnic	H	H	H
18	Barbeque	I	I	I
19	Seeing something in the forest	J	J	J
20	Organised event / trip	K	K	K
21	Admiring the views	L	L	L
22	Fishing	M	M	M
23	Meeting / conference	N	N	N
24	Camping	O	O	O
		(25-28m)	(33-36m)	(41-44m)
25	Go Ape!	A	A	A
26	A trim trail / exercise trail	B	B	B
27	A Forest Drive	C	C	C
28	Other (please specify)	X	X	X
	None of these	M	M	M

ASK ALL

SHOWCARD D

Q6 Approximately how long have you spent here today in total?
SINGLE CODE – RECORD IN 1ST ROW OF GRID BELOW

Q7 - ONLY ASK FOR ACTIVITIES THAT HAVE BEEN CODED AT Q4a (COLUMN A)

SHOWCARD D AGAIN

Q7 And approximately how long have you spent here today.....?
SINGLE CODE

	0-15 mins	16-30 mins	31-60 mins	1-2 hours	2-3 hours	3-5 hours	5+ hours	DK	
Q6 – TOTAL HOURS SPENT	1	2	3	4	5	6	7	8	(50)
Q7 - READ OUT IF CODED AT Q4a									
Cycling on forest roads, tracks or trails	1	2	3	4	5	6	7	8	(51)
Cycling / mountain biking off trails or tracks	1	2	3	4	5	6	7	8	(52)
Dog walking	1	2	3	4	5	6	7	8	(53)
Walking on a sign-posted trail	1	2	3	4	5	6	7	8	(54)
Walking but not following sign posts	1	2	3	4	5	6	7	8	(55)
Orienteering	1	2	3	4	5	6	7	8	(56)
Running / jogging	1	2	3	4	5	6	7	8	(57)
Horse riding / pony trekking	1	2	3	4	5	6	7	8	(58)

ASK ALL

SHOWCARD E

Q8 How or where did you find out about this site as a place to visit?
CODE ALL MENTIONED

(59-62m)

Always known about it	1
Been here before	2
Word of mouth	3
Library	4
Local newspaper	5
National newspaper	6
Leaflet	7
Tourist Board	8
Road signs	9
Just passing / en route	A
Map	B
Smartphone app	C
Facebook	D
Twitter	E
Forestry Commission website	F
Natural Resources Wales website	G
Google	H
Other website (please specify) _____	X
Other (please specify) _____	X
	(63-66m)
Don't know / can't remember	M

<p>Q9 What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED</p> <p>Peace / tranquillity / relaxation Scenery / views / beautiful Walks / paths / trails Cycle trails / freedom / opportunity to cycle Wildlife / bird watching Fresh air / being outside Exercise / keeping fit Activities / good for / something to do with the children Close to home / convenient Opportunity to spend time with family / friends Safe environment Lots to see and / or do Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after The weather Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money</p> <p>Other (please specify) _____</p>	<p>(70-73m)</p> <p>1 2 3 4 5 6 7 8 9 A B C D E F G H I J K</p>
<p>Nothing</p> <p>Don't know</p>	<p>(74-77m)</p> <p>L M</p>
<p>Q10 What, if anything, would enhance your enjoyment of this site? PROBE Anything else? RECORD VERBATIM IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Nothing</p> <p>Don't know</p>	<p>(78-81m)</p> <p>L M</p>
<p>Q11 What, if anything, interfered with your enjoyment of this site today? PROBE Anything else? RECORD VERBATIM IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Nothing</p> <p>Don't know</p>	<p>(82-85m)</p> <p>L M</p>

SHOWCARD F

Q12 How would you rate the site in terms of how safe and welcoming it feels?

SINGLE CODE

- Excellent
- Very good
- Good
- Fair
- Poor
- Very poor
- Don't know / not sure

ONLY ASK Q13 IF CODED 1-6 AT Q12

Q13 What are the reasons for your rating? **PROBE** Anything else?

RECORD VERBATIM

Don't know

ASK ALL

SHOWCARD G

Q14 Looking at this card, which of these aspects were important to your decision to visit today? **PROBE** Any others?

CODE ALL MENTIONED

95-98m		
1	Access to the Beach	1
2	Animal Puzzle Trail	2
3	Arboretum	3
4	Art or Sculpture in the Forest	4
5	Baby Changing Facilities	5
6	BBQ	6
7	Beamer Trampler - motorised wheelchair hire	7
8	Bike Skills Area	8
9	Bike Wash	9
10	Bird Hide	A
11	Bus Links	B
12	Café	C
13	Camp Site	D
14	Caravan Site	E
15	Centre for Contemporary Art and the Natural World	F
16	Choices of Paths for Walking	G
17	Community Discovery Centre	H
18	Community Orchard	I
19	Conference Facilities	J
20	Craft Barns	K
21	Cycle Hire	L
22	Cycle Shop	M
23	Cycling Tracks or Trails	N

99-102m		
24	Disabled Facilities	1
25	Dog Waste Bins	2
26	Easy / All Ability Access	3
27	Educational	4
28	Events	5
29	Fenced Dog Training Area	6
30	Fishing	7
31	Forest Classroom	8
32	Forest Drive	9
33	Forest Holidays	A
34	Forest Shop	B
35	Go Ape!	C
36	Great Oak Hall	D
37	Heritage Site	E
38	Horse Riding	F
39	Information	G
40	Kite Feeding	H
41	Litter Bins	I
42	Motorsports	J
43	Museum	K
44	National Pinetum	L
45	Nature Reserve	M
46	Open grassy areas	N

103-106m		
47	Orienteering	1
48	Outdoor Arena	2
49	Parking	3
50	Parking charge	4
51	Picnic areas	5
52	Plant Centre	6
53	Play areas and equipment	7
54	Railway	8
55	Restaurant	9
56	Running Trails	A
57	Sensory Garden	B
58	Sign posting of paths and trails	C
59	Staff available at the site	D
60	Toilets	E
61	Trim Trail / Exercise area	F
62	Viewpoint	G
63	Visitor Centre	H
64	Watersports	I
65	Wildlife Activities	J
66	Wildlife Hide	K
67	Youth Shelters	L

(90)

1 }
2 }
3 } **Q13**
4 }
5 }
6 }
7 → **Q14**

(91-94m)

M

Other (please specify) _____ (107-110m)

SHOWCARD G AGAIN

Q15a Which aspects of the site have you used during your visit today?

RECORD IN COLUMN A – CODE ALL MENTIONED

SHOWCARD H

Q15b Now I would like you to rate each of the aspects of the site that you have used during today's visit. So how would you rate....?

ONLY ASK FOR ASPECTS THAT HAVE BEEN CODED AT Q15a – IF 'NONE' OR 'D/K' AT Q15a, SKIP TO Q16, DO NOT ASK Q15b

ASPECTS USED		Q15a COL. A CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(120-123m)								
1	Access to the Beach	1	1	2	3	4	5	6	7	(140)
2	Animal Puzzle Trail	2	1	2	3	4	5	6	7	(141)
3	Arboretum	3	1	2	3	4	5	6	7	(142)
4	Art or Sculpture in the Forest	4	1	2	3	4	5	6	7	(143)
5	Baby Changing Facilities	5	1	2	3	4	5	6	7	(144)
6	BBQ	6	1	2	3	4	5	6	7	(145)
7	Beamer Tramper - motorised wheelchair hire	7	1	2	3	4	5	6	7	(146)
8	Bike Skills Area	8	1	2	3	4	5	6	7	(147)
9	Bike Wash	9	1	2	3	4	5	6	7	(148)
10	Bird Hide	A	1	2	3	4	5	6	7	(149)
11	Bus Links	B	1	2	3	4	5	6	7	(150)
12	Café	C	1	2	3	4	5	6	7	(151)
13	Camp Site	D	1	2	3	4	5	6	7	(152)
14	Caravan Site	E	1	2	3	4	5	6	7	(153)
15	Centre for Contemporary Art and the Natural World	F	1	2	3	4	5	6	7	(154)
16	Choices of Paths for Walking	G	1	2	3	4	5	6	7	(155)
17	Community Discovery Centre	H	1	2	3	4	5	6	7	(156)
18	Community Orchard	I	1	2	3	4	5	6	7	(157)
19	Conference Facilities	J	1	2	3	4	5	6	7	(158)
20	Craft Barns	K	1	2	3	4	5	6	7	(159)
21	Cycle Hire	L	1	2	3	4	5	6	7	(160)
22	Cycle Shop	M	1	2	3	4	5	6	7	(161)
23	Cycling Tracks or Trails	N	1	2	3	4	5	6	7	(162)
24	Disabled Facilities	O	1	2	3	4	5	6	7	(163)
		(124-127m)								
25	Dog Waste Bins	1	1	2	3	4	5	6	7	(164)
26	Easy / All Ability Access	2	1	2	3	4	5	6	7	(165)
27	Educational	3	1	2	3	4	5	6	7	(166)
28	Events	4	1	2	3	4	5	6	7	(167)
29	Fenced Dog Training Area	5	1	2	3	4	5	6	7	(168)
30	Fishing	6	1	2	3	4	5	6	7	(169)
31	Forest Classroom	7	1	2	3	4	5	6	7	(170)
32	Forest Drive	8	1	2	3	4	5	6	7	(171)
33	Forest Holidays	9	1	2	3	4	5	6	7	(172)
34	Forest Shop	A	1	2	3	4	5	6	7	(173)
35	Go Ape!	B	1	2	3	4	5	6	7	(174)
36	Great Oak Hall	C	1	2	3	4	5	6	7	(175)
37	Heritage Site	D	1	2	3	4	5	6	7	(176)
38	Horse Riding	E	1	2	3	4	5	6	7	(177)

LIST CONTINUED OVERLEAF

39	Information	F	1	2	3	4	5	6	7	(178)
40	Kite Feeding	G	1	2	3	4	5	6	7	(179)
41	Litter Bins	H	1	2	3	4	5	6	7	(180)
42	Motorsports	I	1	2	3	4	5	6	7	(181)
43	Museum	J	1	2	3	4	5	6	7	(182)
44	National Pinetum	K	1	2	3	4	5	6	7	(183)
45	Nature Reserve	L	1	2	3	4	5	6	7	(184)
46	Open grassy areas	M	1	2	3	4	5	6	7	(185)
47	Orienteering	N	1	2	3	4	5	6	7	(186)
48	Outdoor Arena	O	1	2	3	4	5	6	7	(187)
		(128-131m)								
49	Parking	1	1	2	3	4	5	6	7	(188)
50	Parking charge	2	1	2	3	4	5	6	7	(189)
51	Picnic areas	3	1	2	3	4	5	6	7	(190)
52	Plant Centre	4	1	2	3	4	5	6	7	(191)
53	Play areas and equipment	5	1	2	3	4	5	6	7	(192)
54	Railway	6	1	2	3	4	5	6	7	(193)
55	Restaurant	7	1	2	3	4	5	6	7	(194)
56	Running Trails	8	1	2	3	4	5	6	7	(195)
57	Sensory Garden	9	1	2	3	4	5	6	7	(196)
58	Sign posting of paths and trails	A	1	2	3	4	5	6	7	(197)
59	Staff available at the site	B	1	2	3	4	5	6	7	(198)
60	Toilets	C	1	2	3	4	5	6	7	(199)
61	Trim Trail / Exercise area	D	1	2	3	4	5	6	7	(200)
62	Viewpoint	E	1	2	3	4	5	6	7	(201)
63	Visitor Centre	F	1	2	3	4	5	6	7	(202)
64	Watersports	G	1	2	3	4	5	6	7	(203)
65	Wildlife Activities	H	1	2	3	4	5	6	7	(204)
66	Wildlife Hide	I	1	2	3	4	5	6	7	(205)
67	Youth Shelters	J	1	2	3	4	5	6	7	(206)
	None of these	M								
	Don't know	N								

ASK ALL

SHOWCARD H AGAIN

Q16 Overall, how would you rate this site as a place to visit?
SINGLE CODE

- Excellent
- Very good
- Good
- Fair
- Poor
- Very poor

Don't know / not sure

(210)

- 1
- 2
- 3
- 4
- 5
- 6
- 7

Q17 Using a scale of 0 – 10, where 0 means 'Not at all likely' and 10 means 'Extremely likely', how likely is it that you would recommend this site as a place to visit to a friend or relative?
SINGLE CODE

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

(211)

ONLY ASK Q18a IF MORE THAN ONE PERSON IN GROUP

SHOWCARD I

Q18a Thinking about the whole of the group you are with today, how much do you think the whole group are likely to spend in the local area on the following things as a result of your visit today?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE RECORD 0**

- Accommodation, including food and drink purchased there _____ (212-217)
- Food and drink purchased outside any accommodation _____ (218-223)
- Admissions fees to attractions _____ (224-229)
- Parking _____ (230-235)
- Non-routine shopping (e.g. buying souvenirs) _____ (236-241)
- Transport including petrol, taxis, public transport etc. _____ (242-247)
- Hiring equipment such as boats, bikes or horses _____ (248-253)
- Other miscellaneous items _____ (254-259)

**NOW GO TO
Q19**

INSTRUCTION - ONLY ASK Q18b RESPONDENT IS ALONE

SHOWCARD I

Q18b How much do you expect to spend in the local area on the following things as a result of your visit today?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE RECORD 0**

- Accommodation, including food and drink purchased there _____ (261-266)
- Food and drink purchased outside any accommodation _____ (267-272)
- Admissions fees to attractions _____ (273-278)
- Parking _____ (279-284)
- Non-routine shopping (e.g. buying souvenirs) _____ (285-290)
- Transport including petrol, taxis, public transport etc. _____ (291-296)
- Hiring equipment such as boats, bikes or horses _____ (297-302)
- Other miscellaneous items _____ (303-308)

SHOWCARD J AND SHOW MAP

Q19 Looking at this map, can you tell me which of these other sites, if any, you have visited in the last 12 months?

(320-323m)

CODE ALL MENTIONED

Alice Holt Forest	1
Abbotts Wood	2
Bedgebury Forest and Pinetum	3
Cannock Chase	4
Cardinham Woods	5
Chambers Farm Wood	6
Chopwell	7
Dalby Forest	8
Delamere Forest	9
Dunwich Forest	A
Fineshade Woods	B
Forest of Dean	C
Gisburn	D
Grizedale	E
Guisborough Forest	F
Haldon Forest Park	G
Hamsterley	H
Haughmond Hill	I
Hicks Lodge	J
Jeskyns	K
Kielder Forest	L
Moors Valley Country Park	M
New Forest	N
Queen Elizabeth Country Park	O
	(324-327m)
Rendlesham Forest	1
Rosliston	2
Rowney Warren	3
Salcey Forest	4
Savemake Forest	5
Sherwood Pines	6
Thames Chase	7
Thetford Forest	8
Wendover Woods	9
Westonbirt Arboretum	A
West Walk	B
Wharncliffe	C
Whinlatter	D
Wyre Forest	E
Other woodland / forest in England (please specify) _____	(328-331m)
Other woodland / forest in Wales (please specify) _____	
None of these	M
Don't know / can't remember	N
For office use only: 332-600 for Wales sites	

Q20a Do you currently hold an annual Discovery Pass or Friends membership for this site?	(601)
Yes	1
No	2
Don't know / can't remember	3

SHOWCARD K

Q20b Currently you can get season tickets or Discovery Passes for individual Forestry Commission sites in a local area. How interested would you be in having a pass that allowed free parking and discounts at all Forestry Commission sites nationally? This would probably cost around £70 per year, per household. SINGLE CODE	(602)
Very interested	1
Fairly interested	2
Not very interested	3
Not at all interested	4
Depends on how much it costs – DO NOT PROMPT WITH THIS CODE	5
Don't know	6

ASK ALL

READ OUT – Finally, I'd like to ask some questions for analytical purposes.

Q21 INTERVIEWER RECORD GENDER	(603)
Male	1
Female	2

Q22 Which of the following age bands do you fall into?	(604)
16-24 years	1
25-34 years	2
35-44 years	3
45-54 years	4
55-64 years	5
65+ years	6
Refused	7

SHOWCARD L

Q23 Which of these best describes your employment status right now? SINGLE CODE	(605)
Employee in full time job (30 hours plus a week)	1
Employee in part time job (under 30 hours per week)	2
Self-employed full or part time	3
On a government supported training programme	4
Full time education at school, college or university	5
Unemployed and available for work	6
Permanently sick / disabled	7
Wholly retired from work	8
Looking after the home	9
Other (please specify) _____	
Refused	Z

Q24 Can you tell me the occupation of the Chief Income Earner within the household?
(The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. This person can be of either sex.) (606)

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

Job title _____

Position / Grade _____

AB	1
C1	2
C2	3
DE	4
Refused	5

Q25 Do you have any children aged 15 or under living in your household? (607)

Yes	1
No	2
Refused	3

Q26 Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?
INCLUDES PROBLEMS RELATED TO OLD AGE (608)

Yes – limited a lot	1
Yes – limited a little	2
No	3
Refused	4

SHOWCARD M

Q27 Which of these best describes your ethnic origin?
SINGLE CODE

White British
 White Welsh
 White Irish
 White East European
 White other European
 Any other White background (please specify) _____

Caribbean
 African
 Any other Black background (please specify) _____

Indian
 Pakistani
 Bangladeshi
 Any other Asian background (please specify) _____

White and Black Caribbean
 White and Black African
 White and Asian
 Any other Mixed background (please specify) _____

Chinese

Other (please specify) _____

Refused

Q28 So we can map where visitors have come from, can I please have your postcode?
 Please be assured that this information will only be used for analysis purposes
 and will not be used to identify individuals.

**ENSURE POSTCODE IS COLLECTED IN FULL WHERE POSSIBLE, OR AS
 MUCH OF POSTCODE AS RESPONDENT WILL PROVIDE**

(610)	(611)	(612)	(613)	(614)	(615)	(616)

Overseas visitor (please specify country) _____

(609)

1

2

3

4

5

E

6

7

F

8

9

A

G

B

C

D

H

J

I

Z

(617-618)

Respondent Name:					
Address:					
Telephone number:					
THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.					
<i>Interviewer Declaration:</i> I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:					
Signature				Date of interview:	
				(621)(622)(623)(624)	
WRITE IN YOUR INTERVIEWER NUMBER →				(625)	(626)
				(627)	(628)
B01326-1	F.O.U (BACK CHECKS)		Accompanied	Yes 1 No 2	Supervisor signature

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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