

Visitor surveys: Tourism gateways

National Forest Company, QA Research Ltd and site owners.



THE NATIONAL
FOREST

Introduction

The research

This research summary covers one of two pieces of visitor perception research conducted by QA Research Ltd. It should be read in conjunction with the “Visitor Surveys: Willesley Wood” summary, which discusses a visitor survey undertaken at a local community woodland created within The National Forest.

The National Forest Visitor Survey^{1,2} was undertaken in 2007 and measured the impact of gateway installations at five tourism attractions on visitors’ perceptions and awareness of The National Forest. Around 40 Forest “gateways” have been installed across the Forest, ranging from Forest-branded interpretation panels to touchscreen kiosks, sculptures, shelters with interpretation, benches, leaflet units and catering tables. The five gateways used in the survey were Conkers, Snibston Discovery Park, Ferrers Centre for Arts and Crafts, Sence Valley Forest Park and Rosliston Forestry Centre.

Why do it?

In order for tourism growth to continue within The National Forest, it is important that facilities and services are developed and maintained to a high standard, to meet visitor expectations. Significant investment has been made to develop five primary ‘gateways’ to help raise awareness and understanding of The National Forest as a destination and to encourage visitors to explore further and/or to make return visits. The survey enabled visitor attractions within the Forest (and those partners funding them) to measure the effectiveness of this investment, and helped to assess how attractions could be improved in the future.

Aims & objectives

The survey tested different research methodologies and provided recommendations for future research requirements. Two sets of surveys were undertaken: one before gateways were installed, and a second following installation. Key objectives of the pre-installation surveys were to establish baseline data and gain an understanding of:

- the pattern of trips (e.g. day/overnight visits, mode of transport);
- activities undertaken (e.g. attractions and towns visited);
- visitors’ understanding and awareness of The National Forest;
- visitor satisfaction with visit (e.g. rating of facilities and services such as information provision);
- suggestions for improvements to infrastructure;
- attitudes towards sustainable tourism; and
- profile of visitors (e.g. age, family size, repeat visitor, origin).

Key objectives at the post-installation phase were to measure:

- the impact of the gateway features on visitors’ perceptions;
- visitors’ awareness and use of gateway features and sites;
- the length of use of gateway features; and
- the impact of gateway features in raising awareness, understanding and enjoyment of visits.

The Project

Description

Surveys were undertaken ¹pre- and ²post-installation of the gateway features, to assess the impact of the new visitor infrastructure and to investigate visitors’ experience of the Forest.

The results were compared to a similar survey undertaken at three of the same attractions (Conkers, Rosliston Forestry Centre and Sence Valley Forest Park) in 2001³, to assess how visitor perceptions had changed over time.

Approach

Face to face interviews were undertaken with visitors at five gateway sites and one non-gateway site. In total, 610 surveys were completed pre-installation and 740 surveys were completed post-installation. For comparison, the aim is to repeat the surveys every three to five years.

Timescales

Surveys conducted between April to October 2007. Both reports were completed by December 2007.

Budgets

£22,254.50 including VAT (Funded by East Midlands Tourism and the NFC).

Results

Outcomes

Detailed survey reports are available for each of the visitor attractions pre- and post-gateway installation. For the purposes of this summary, the overall results of both surveys are grouped into six sections:

Profile of visitors.

- Visitors were from a mix of social grades, with 80% from A/B/C1 backgrounds. Most were aged 35 years or above (83%). The highest proportion of visitors fell within the 35 to 44 year age category (36%).
- The majority of visitors were from areas within or surrounding The National Forest, including Derbyshire (22%), Leicestershire (30%), Staffordshire (13%), the West Midlands (7%) and Nottinghamshire (7%).

Pattern of current visitors.

- Visitors were predominantly local residents (41%) or on a day trip from home (47%).
- Although predominantly a day visitor destination, a higher proportion of visitors stayed overnight in 2007 (10%; as compared to 4% in 2001).
- A high proportion of visitors were repeat visitors (92%), with 30% visiting on a monthly, weekly or daily basis.
- Most visits were by family groups (61%) and average party size ranged from three to four people. Solitary visitors were relatively rare (6%).
- The average amount of time spent on a visit was 3.29 hours. The longest visits were at Conkers (4.42 hours), compared to the shortest visits at Sence Valley Forest Park (1.55 hours).

Motivations for visiting

- Most respondents were visiting the attraction because of previous local knowledge of the site (52%) or due to a recommendation by friends and family (25%).
- The most popular activities were walking (75%), visiting attractions (57%), eating and drinking out (43%), visiting woodlands (24%) and wildlife/conservation (19%).
- Visitors took part in a wider range of outdoor activities in the 2007 survey, compared to 2001.

Mode of transport to sites

- Most visitors arrived by car (93%, which is in line with 2001 results). Only 1% arrived by public transport, 2% by cycle and 2% on foot.

Overall satisfaction levels

- Overall enjoyment and satisfaction levels were high (91%).
- Most visitors felt that the overall design of the site was appealing (96%).
- Specific site features were rated satisfactory to very good, with interpretation boards receiving the highest ratings.
- A small number of improvements were suggested, including enhancing and expanding children's activities, and providing more access to information relating to outdoor activities.
- When asked to describe The National Forest as a place to visit, the majority of comments were positive. Visitors described the Forest as "relaxing and beautiful", "fresh air, open space; a place to breathe!" and "provides a whole range of activities for all ages."

Awareness and perceptions of The National Forest

- 51% of visitors were aware of The National Forest brand pre-gateway installation and this rose to 56% after installation. Results also indicated that visitors from outside of the Forest had become more aware of the brand.
- 59% of visitors thought that “The National Forest is not very well known” pre-installation, but this fell to 51% post-installation, indicating that the gateways had helped to improve visitors’ understanding of The National Forest.
- There was growing visitor awareness of key NFC roles, particularly in relation to planting trees (75%), enhancing and protecting wildlife (72%) and encouraging recreation (62%).

Potential applications

- The visitor attractions research has informed The National Forest Tourism Strategy.
- The findings have been shared with tourism partners (Destination Management Partnerships, local authorities and tourism venues) to provide intelligence on visitor perceptions and experiences, to drive up quality standards in this emerging destination.
- The survey recommendations will help the NFC to establish a cost-effective, value for money way of tracking visitor awareness, experience and spend.
- The research provides helpful feedback to individual attractions, to help improve visitor facilities.
- Getting visitor feedback will improve the attraction site experience and enable the NFC to respond to the requirements of the audience.

Further information

Dissemination

- Press release.
- Sharing of data with partner organisations.
- NFC website www.nationalforest.org
- The NFC’s Forest Scene newsletter.
- NFC research review seminar 2010.

Links to published work

- ¹ *National Forest Visitor Survey Report, Pre-Installation Stage, Phase One* (June 2007). Produced by QA Research, for the National Forest Company.
- ² *National Forest Visitor Survey Report, Post-Installation Stage, Phase Two* (December 2007). Produced by QA Research for the National Forest Company.
- ³ *The National Forest Visitor Survey 2001* (2002). Produced by the Research Unit, Heart of England Tourist Board for the National Forest Company.
National Forest Visitor Research Project Summary 2007 (2008). Produced by QA Research for the National Forest Company.

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