

'Visitor Survey at Willesley Wood'

for The National Forest



February 2009



Research

QA Research, Brackenhill, St. George's Place, YORK, YO24 1DT

01904 632039

www.qaresearch.co.uk

Company registration: 3186539



Research

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Project number:	TRISM08-4174
Title:	Willesley Wood Visitor Survey
Location	<u>NFC Willesley Wood Visitor Survey Report Nov08 V3.doc</u>
Date:	3 December 2008
Report status:	Final
Approved by:	Nick How
Authors:	Chantal Trembath & Laura Bainbridge
Comments:	nick.how@qaresearch.co.uk

Executive Summary

Profile of visitors

- Willesley Wood attracted a significantly higher proportion of local residents (89%) in 2008, than in 2001 (54%).
- Visitors to Willesley Wood are primarily from higher and mid social grades (25% AB, 37% C1), and more likely to belong to middle and older age groups (47% aged between 35 and 54 years) and visit without children (86%).
- Visitors are almost twice as likely to be from Leicestershire in 2008 (61%) than in 2001 (32%), whereas they are less likely to be from Derbyshire in 2008 (31%) compared to 2001 (66%).
- About 5% of all visitors had a disability and 4% were visitors from Black and Minority Ethnic (BME) groups.

Visitor patterns

- Findings show that the vast majority of people (80%) visit the site over 20 times a year.
- 60% of total visitors visit Willesley Wood daily, 28% weekly and 12% monthly.
- Visitors are most likely to spend only short time periods in Willesley Wood, with three quarters staying under 1 hour (73%).

Travel

- Similar to the 2001 findings, the largest proportion of visitors arrived by car (91% in 2008 and 89% in 2001), followed by 9% who arrived on foot (which is a 4% point increase compared to 2001).

Motivations for visiting

- The main reasons for visiting include dog walking (64%) and short walks (23%).
- Most visitors to Willesley Wood live locally and have local knowledge of the site (82% in 2008). A further 10% of respondents were visiting due to a recommendation by friends and family (10% in 2008).

Previous visiting

- Most visitors to Willesley Wood are repeat visitors (90%) but there has been a steady increase in first time visitors since 2001 (6% up to 10%).

Visitor evaluation of Willesley Wood

- Overall, different features at Willesley Wood continue to achieve satisfactory to good ratings. Highest ratings (on a scale from 1 to 5 with 1 being very poor and 5 being very good) were given to trails/footpath management and quality (4 mean score) and general maintenance of the site (4.0).

- Positively, 61% could not state anything they disliked about their visit to Willesley Wood. Visitors most enjoyed the peaceful and relaxing atmosphere (35%) and the countryside and open spaces (25%).
- Suggestions for improvement included improving the footpaths (30%) and more dog bins (13%).

Awareness and understanding of The National Forest

- Almost six out of ten visitors were aware of The National Forest (58%), which resembles the figures from the National Forest Visitor Survey 2007 (56%).
- All of the respondents (100%) stated that they had heard of The National Forest even before being interviewed, indicating that The National Forest name is recognised.
- The understanding of the National Forest Company's role is fairly well developed with 81% of all visitors identifying 'Planting and managing trees' as one of its roles, and 64% saying to 'enhance and protect the wildlife'.
- Approximately one in five visitors (22%) were aware of the size of The National Forest being between 151 and 250 square miles.

Willingness to support sustainable tourism

- Visitors are most likely to walk and cycle more, and to use environmentally aware accommodation.

Estimated number of visitors

- The estimated number of visitors has been calculated below and shows an almost four fold increase in total visitor numbers using Willesley Wood since 1998.

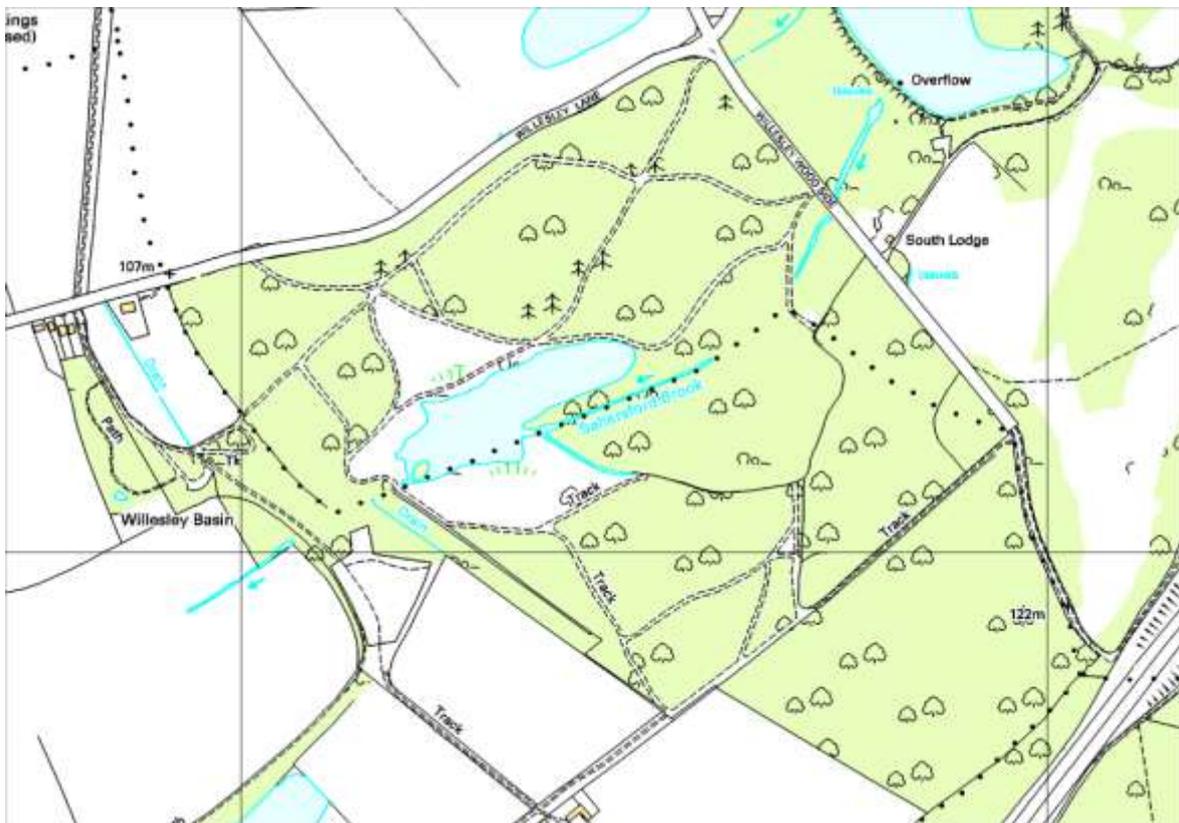
Estimated Visitor Totals		
Type of day	1998 estimates	2008 estimates
Bank Holidays	232	344
Weekday Summer	1299	3250
Weekend Summer*	317	2168
Winter	1274	6052
Total	3122	11,814

1. Introduction

This document provides the findings of the Willesley Wood Visitor Survey and observation research conducted by QA Research (QA) on behalf of the National Forest Company (NFC). The research was commissioned to investigate visitors' usage and experience of Willesley Wood and compare the findings to previous research undertaken.

The National Forest is a forest in the making: a place of 200 square miles spanning parts of Staffordshire, Derbyshire and Leicestershire in the English Midlands. From one of the country's least wooded regions, the ambitious goal for the National Forest Company is to increase woodland cover to about a third of all the land within its boundary.

Willesley Wood, is a 42ha woodland site, within The National Forest, owned by the Woodland Trust. It was the site of the first tree to be planted in the development phase of The National Forest by Michael Heseltine in 1991. Willesley Wood is a locally-used woodland site, popular with dog walkers.



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Figure 1: Willesley Wood site plan

This report builds on previous research studies at Willesley Wood, which have been used where appropriate throughout the report for comparison purposes. The previous research studies used are:

- National Forest Visitor Survey 2001 Willesley Wood – Heart of England Tourist Board (based on 37 respondents)
- National Forest Visitor Survey 1998 Site Report – Loughborough University (based on 68 respondents)

The results for Willesley Wood are also compared to the findings of a recent survey of six visitor attractions in The National Forest (National Forest Visitor Survey 2007 – QA Research). However, Willesley Wood is a locally-used woodland site, with a very different type of visitor and pattern of usage. The results for the larger-scale visitor attractions survey are therefore included in this report as an interesting comparison to Willesley Wood.

2. Aims and objectives

The overall aim of the research was to:

'Update research undertaken ten years ago to be able to compare visitor usage and perceptions of the wood and complement information obtained from visitors regarding The National Forest in 2007.'

Within this the specific research aims were to:

- Profile visitors
- Determine the mode of transport used to visit the wood
- Identify the motivations for visiting
- Understand previous visiting patterns
- Rate levels of satisfaction of visit
- Uncover suggested future improvements
- Measure current understanding and awareness of The National Forest
- Understand attitudes towards sustainable tourism

3. Methodology and sample

A quantitative methodology was used with research consisting of 9 interview days with an interviewer positioned at the main entrance at Oakthorpe, counting as well as stopping visitors and asking if they would be willing to participate in a short survey. The questionnaire (see Appendix 1) included a screening question to ensure visitors who had previously answered the survey were not re-interviewed but were included in that days count.

All visitors to the wood were counted using a tally sheet (e.g. if they arrived in a group of three all three people were counted). The visitor count below is inclusive of those who also participated in the survey.

Interviews days were conducted across a range of dates and types of day in order to assess usage levels throughout the year and capture the views of different types of visitors including the views of those using the wood at different times of day.

Table 1: Summary of visitor counts and survey completions

Shift Date	Visitor Count	Survey Completions	Times of Day	Type of Day	Weather
26th May	36	17	11-6	Spring Bank holiday	Cold, dry and windy
15th June	37	16	11-6	Summer weekend	Dry
27th July	34	10	8-3	Summer weekend	Hot and sunny
12th August	25	8	8-3	Summer weekday	Wet
25th August	50	12	11-6	Summer Bank holiday	Windy
20th September	48	13	8-3	Autumn weekend	Sunny
21st September	58	13	8-3	Autumn weekend	Sunny
12th October*	18	4	9-4	Autumn weekend	Dry and sunny
27th October	34	4	9-4	(half term)	Dry
Total	340	97			

* The shift on October 12th was cut short because of a police operation taking place in the wood which meant visitors and our interviewer were asked to leave the area. The initial target was to survey 100 visitors but it was apparent that Willesley Wood attracts a large proportion of repeat visitors who increasingly had taken part in the survey (shown by the drop in surveys completed after the initial few shifts). Hence, having communicated with the research team at The National Forest 97 interviews was deemed acceptable.

At an overall level, 97 interviews provide data which is statistically robust and reliable to +/- 9.9% at a 95% confidence level. Please note that the results are outside of the +/- 5% standard industry error rate and are therefore indicative only.

Please note that throughout the report comparisons have been made with the Willesley Wood survey from 2001 and 1998 as well as the 2007 and 2008 National Forest visitor surveys. However, please be aware that the 2007 and 2008 National Forest survey results are based on sampling visitors, not local residents and should therefore not act as a direct comparison to the Willesley Wood findings.

4. Visitor survey key findings

The key findings from the research are shown below.

Within the title of each chart and table is the question number for easy reference to the survey (see Appendix 1).

Please note that percentages have been rounded up or down, with any 0.5% figures being rounded up, so some figures may not add up to 100%.

Some questions are also multiple responses; therefore respondents were able to respond to more than one option and these percentages will be higher than 100%.

4.1 Profile of visitors

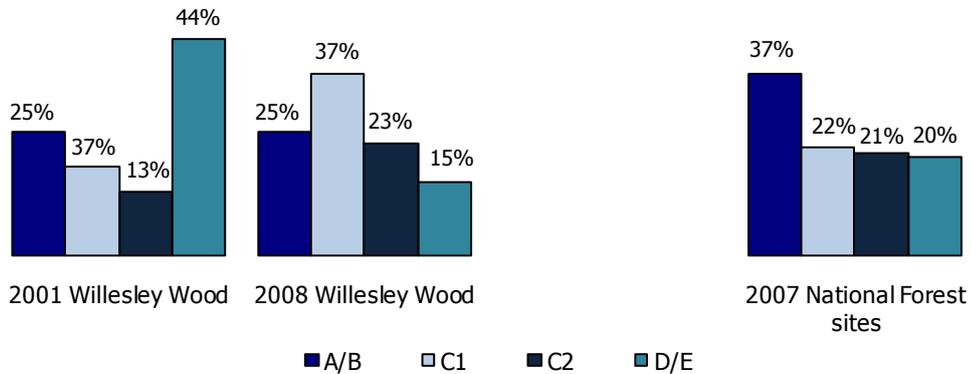
Social grade

Visitors were asked to specify the occupation of the chief wage earner in their household, or if they were retired, were asked to state their last occupation. These occupations were coded against the standard occupation classification system (SOC):

- A - Upper Middle Class: Higher Managerial, Administrative or Professional
- B - Middle Class: Intermediate Managerial, Administrative or Professional
- C1 - Lower Middle Class: Supervisory or Clerical, Junior managerial, Administrative or Professional
- C2 - Skilled Working Class: Skilled Manual Workers
- D - Working Class: Semi and Unskilled Manual Workers
- E - Those at lowest level of subsistence: State Pensioners or Widows (no other earner), Casual or Lowest Grade Workers

The results are shown in the chart below.¹

Chart Q25: Social Grade

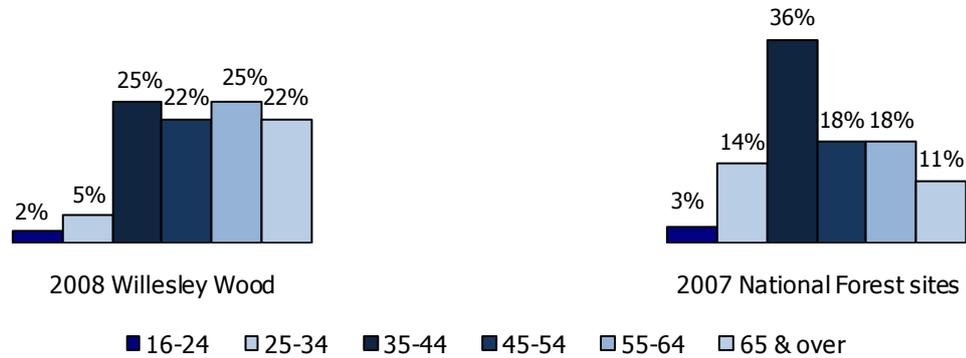


Base: 2001 (68), 2007 (738), 2008 (97)

¹ Please note that the 2001 Heart of England survey classified all retired persons as belonging to social grade E, therefore care should be taken when comparing survey findings.

Age

Chart Q26: Age

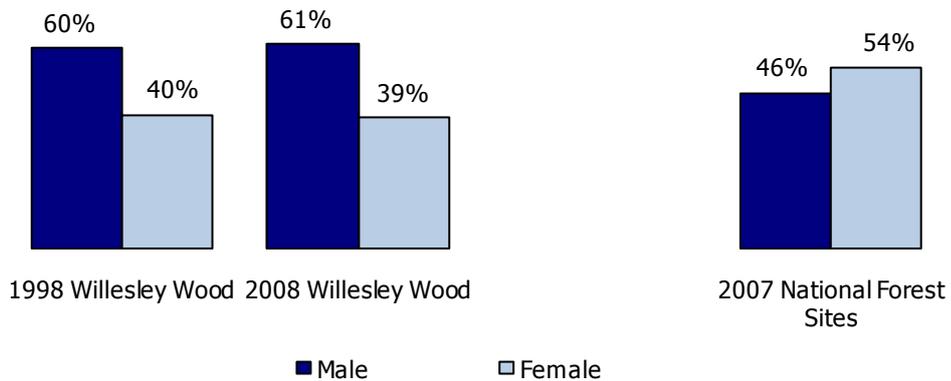


Base: 2007 (740), 2008 (97)

Results indicate that Willesley Wood attracts visitors of all ages. However, younger visitors (aged between 16 and 34 years) appear to be slightly less represented (7%) than older visitors (22%).

Gender

Chart Q26: Gender



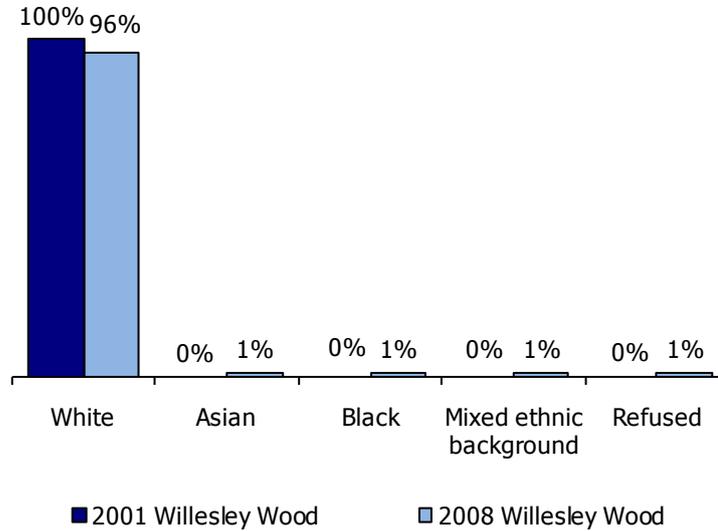
Base: 1998 (37), 2007 (740), 2008 (97)

Overall, interviews took place in Willesley Wood with more men (61%) than women (39%). The 2008 results are very much in line with the Willesley Wood survey results from 1998.

Ethnicity

Respondents were shown a list of ethnic groups and were asked to identify which one they believed they belonged to.

Chart Q27: Ethnicity

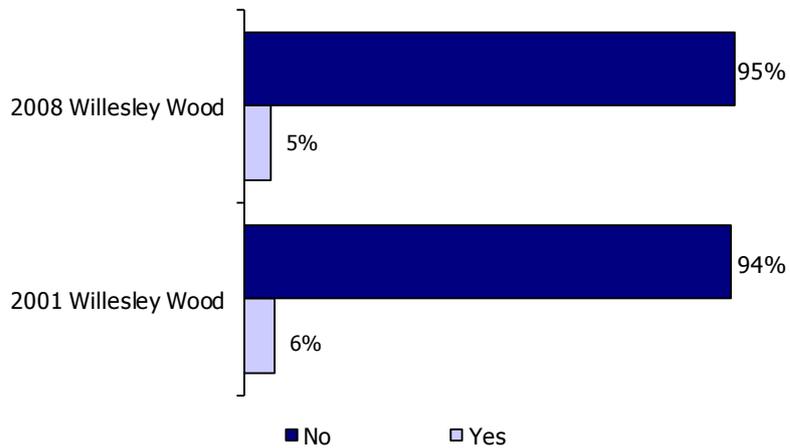


Base: 2001 (68), 2008 (97)

The 2008 results show a marginal increase of non-White visitors (up by 4% compared to 2001) findings.

Disabilities

Chart Q28a Disabilities



Base: 2001 (68), 2008 (97)

Five respondents interviewed at Willesley Wood stated that they had a disability.

The proportion of disabled persons visiting Willesley Wood at present (5%) has remained similar to the 2001 survey findings (6%).



4.2 Visitor patterns

Type of visitor

Table Q3a: Type of visitor

	2001 Willesley Wood	2008 Willesley Wood	2007 National Forest Sites
Local resident	54%	89%	41%
Day trip	46%	11%	47%
Paid accommodation	0%	0%	5%
Staying with friends/relatives	0%	0%	5%
Other	0%	0%	3%
Total (base)	68	97	740

Willesley Wood appears to be attracting more local residents (up 35% from 2001), yet has experienced a 35% decline in relation to day visitors when compared with findings from 2001.

The differences with the 2007 National Forest survey results can be explained by the fact that Willesley Wood is a local wood, designed for local usage, which attracts fewer day trippers and overnight stays. However, The National Forest sites surveyed in 2007 are larger visitor attractions, which will obviously attract day trippers and overnight visitors.

Party size (Q4)

The number of adults per party ranged from 1 to 4. The mean average number was 1.6 adults.

A high proportion of respondents did not visit Willesley Wood with children (86%). Of the 14% of parties that did include children, the number ranged from 1 to 4. The mean average number of children across all visitors interviewed was 0.3.

In total, the average party size was 1.9 people.

Results show that since 1998 the number of people visiting Willesley Wood on their own has decreased (60% in 1998 to 43% in 2008).

Group type

The table below is based on multiple responses, therefore percentages add up to more than 100%.

Table Q5: Group Type

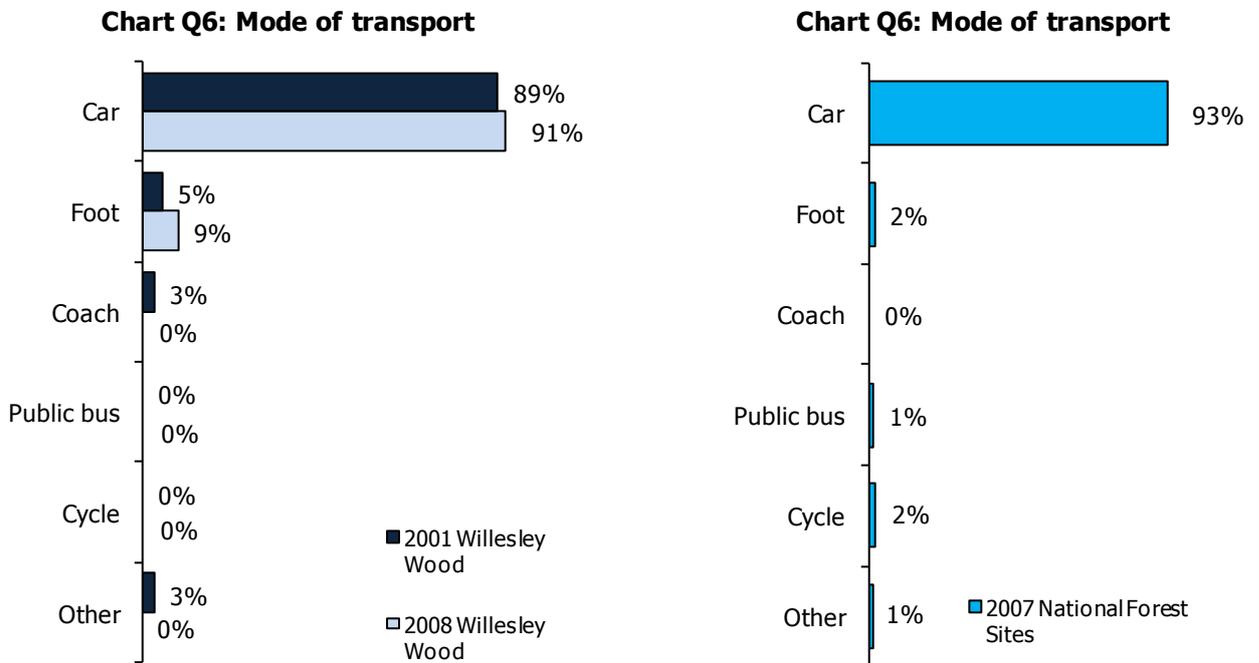
	% 2008 Willesley Wood	Count 2008 Willesley Wood	% 2007 National Forest sites	Count 2007 National Forest sites
Alone	43%	42	6%	41
Partner	33%	32	38%	278
Family	22%	21	61%	447
Friends	5%	5	17%	126
Organised group	0%	0	3%	24
Other	0%	0	0%	3
Total (base)	97	97	735	735

Findings show in comparison to other National Forest locations, Willesley Wood appeals less to those visiting with families (61% in 2007 to 22% in 2008) or friends (17% in 2007 to 5% in 2008), being predominantly favoured by individuals (43%) and couples visiting without children (33%).

4.3 Travel

Mode of transport

Respondents were asked which specific mode of transport they had used to reach Willesley Wood.



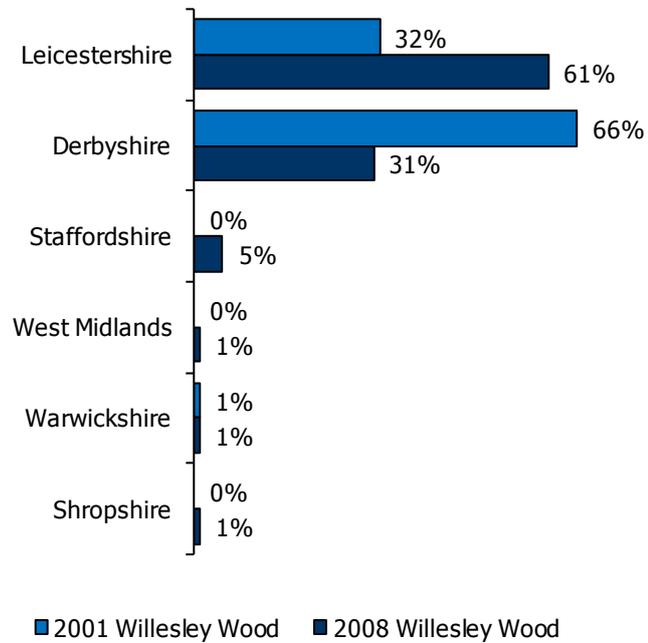
Base: 2001 (68), 2007 (736), 2008 (97)

Despite an almost doubling of those visiting on foot, the significant increase in local residents visiting Willesley Wood (Q3a) has not seen a corresponding decrease in those travelling by car.

Origin of visitors

Respondents were asked to state where they had started their journey from on the day they were interviewed.

Chart Q7a: Origin of visitors



Base: 2001 (68), 2008 (87)

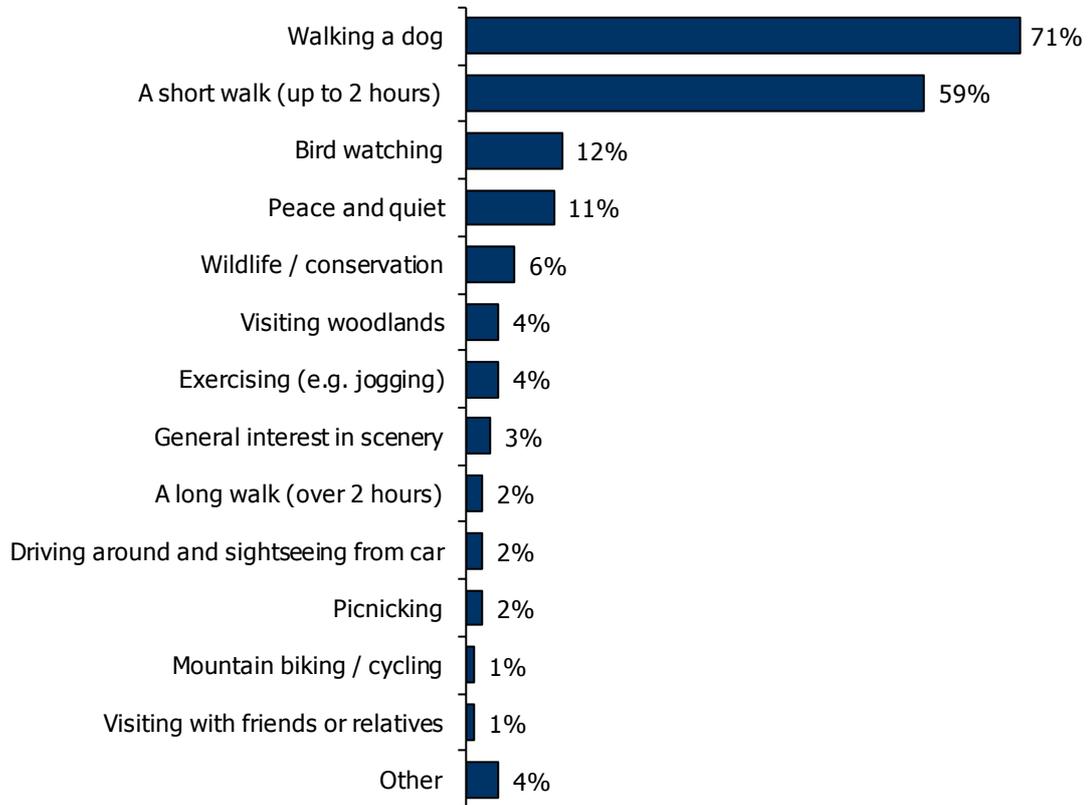
The majority (97%) of visitors to Willesley Wood originate from the three National Forest 'parent' counties of Leicestershire (61%), Derbyshire (31%) and Staffordshire (5%).

4.4 Motivations for visiting Willesley Wood

Reason(s) for visiting

The table below is based on multiple responses, therefore percentages add up to more than 100%.

Chart Q8: Reason(s) for visiting



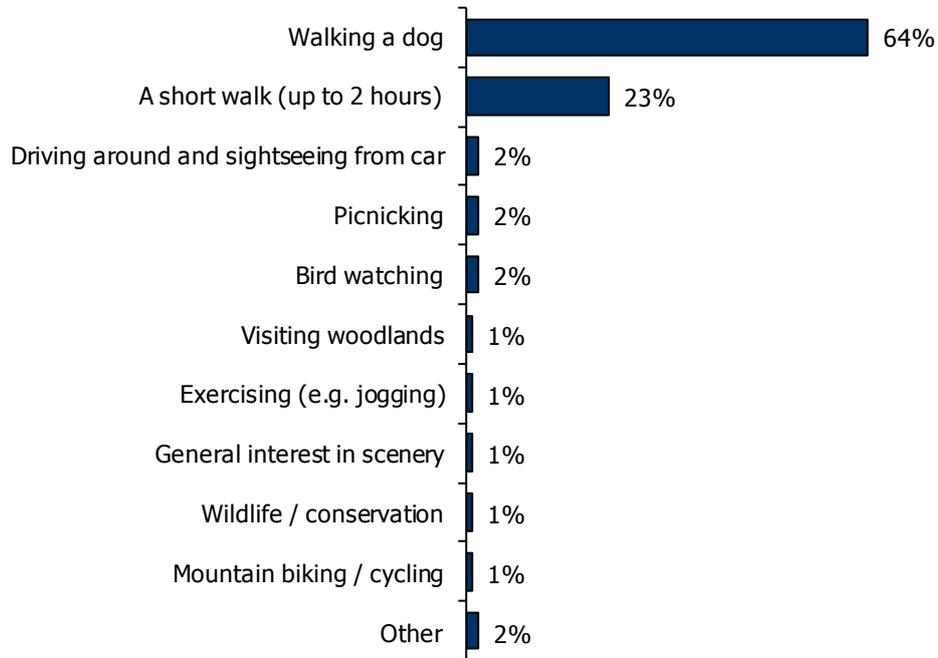
Base: 97

The two most common reasons for visiting Willesley Wood, a short walk or walking the dog, perhaps reflect the predominantly local nature of visitors.

Main reason for visiting

Respondents were given a list of options and asked to specify what their main reason was for visiting Willesley Wood.

Chart Q9: Main reason for visiting



Base: 97

Findings suggest that the main reason why people visit the area has not changed since 2001 as walking - either with a dog (60% in 2001, 64% in 2008) or for a short period of time (12% in 2001, 23% in 2008) - remains the principal activity undertaken by visitors.

Sources of information

Respondents were asked what had prompted them to visit Willesley Wood.

The table below is based on multiple responses, therefore percentages add up to more than 100%.

Table Q10: Sources of information

	2001 Willesley Wood	2008 Willesley Wood	2007 National Forest sites
Local knowledge / live locally	0%	82%	52%
Recommendation by friends / family	49%	10%	25%
Advert / Article in newspaper or magazine	7%	3%	3%
Internet	0%	2%	4%
Seeing a National Forest sign	38%	2%	2%
A National Forest leaflet / visitor guide	0%	0%	9%
Tourist Information Centre	0%	0%	2%
White on brown road signs	0%	0%	3%
TV or radio	0%	0%	1%
A National Forest information board	0%	0%	1%
Other	3%	10%	27%
Total (base)	68	97	740

'Other' sources of information were:

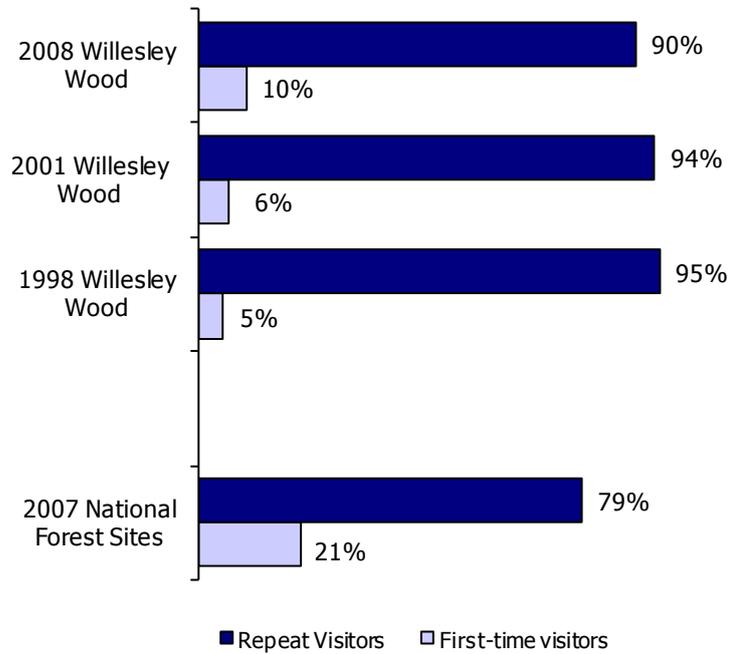
- Car navigation systems (2)
- Passing by (2)
- The weather (2)
- Volunteering (1)
- Visiting a memorial tree (2)
- Woodland Trust leaflet (1)

The site is used primarily by people who live locally, or have local knowledge about it.

4.5 Previous visiting

Repeat visitors

Chart Q11a: Repeat visitors



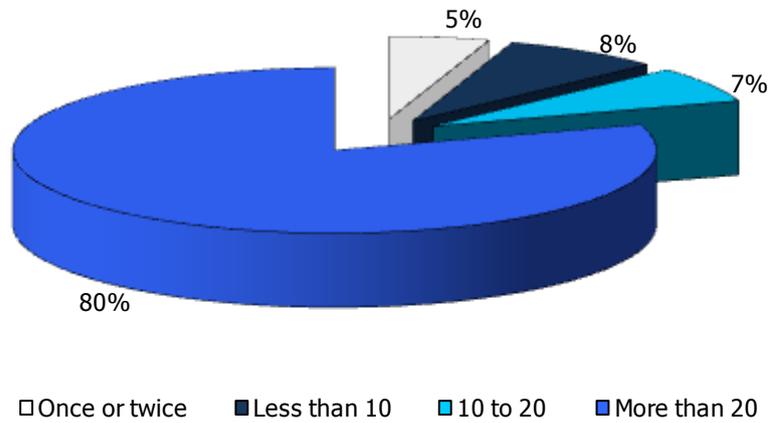
Base: 1998 (37), 2001 (68), 2007 (731), 2008 (97)

Most visitors to Willesley are repeat visitors (90%), but with a steady increase in first time visitors since 2001 (6% -10%).

Frequency of visits

Respondents who were not visiting Willesley Wood for the first time were asked how many times they had visited in the last 12 months.

Chart Q11b: Number of visits in the past 12 months



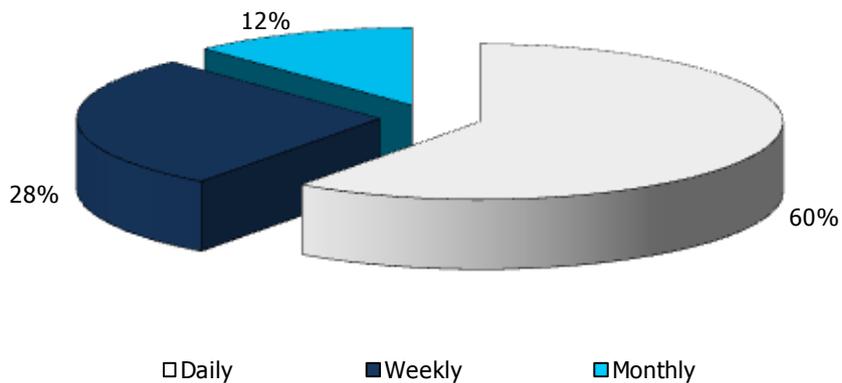
Base: 86

Findings show that the vast majority of people (80%) visit the site over 20 times a year.

Regular visitors

Respondents who had visited Willesley Wood more than 10 times in the past year were asked how regularly they visit.

Chart Q11c: Regular visitors



Base: 75

Out of the 60% of people who visit Willesley Wood on a daily basis 82% are doing so to go dog walking (Q9).

Results indicate that the amount of people visiting the area on a daily and monthly basis has increased by 8% and 5%, respectively, since 2001. The number of weekly visitors however has fallen by 13 percentage points (41% in 2001, 28% in 2008).

Length of stay at site

Respondents were asked how long they had spent, or expected to spend, at Willesley Wood. Please note, although the 2001 Heart of England survey did not provide a breakdown of the time visitors spent at the site in hours, it did provide a mean average length of stay.

Table Q12: Length of time spent/expected to spend at Willesley Wood

	2001 Willesley Wood	2008 Willesley Wood	2007 National Forest sites
Under 1 hour	-	73%	2%
1-2 hours	-	22%	15%
2-3 hours	-	3%	22%
3-4 hours	-	1%	19%
4-5 hours	-	0%	19%
5-6 hours	-	0%	11%
6-7 hours	-	0%	8%
7-8 hours	-	0%	2%
8 hours or over	-	0%	1%
Mean	1.30	1.05	3.29
	68	97	727

Time spent at Willesley Wood ranged from 15 minutes to 4 hours. The mean average length of stay was 1.05 hours.

Compared with 2001 (1.30 hours), the 2008 results show that the average length of stay has decreased by 25 minutes.

As the above table illustrates, the average length of time presently spent at the site (1.05 hours) is considerably lower than at other National Forest sites that were surveyed in 2007 (3.29 hours), because Willesley Wood cannot be considered to be a major visitor attraction, that attracts people to spend longer periods of time.

Visitors to Willesley Wood are generally regular visitors who are primarily there to walk their dog.

4.6 Visitor evaluation of Willesley Wood

Awareness and usage of features

Respondents were shown a list of features and were asked if they were aware or had used any of them. Results are shown in the table below.

Table Q13a: Awareness and usage of features

	Use/ Awareness	2008 Willesley Wood	2007 National Forest sites
Information/signage on site	Not Aware	12%	-
	Aware	64%	-
	Used	24%	-
Seating areas	Not Aware	12%	6%
	Aware	55%	23%
	Used	33%	71%
Interpretation panels/boards	Not Aware	36%	13%
	Aware	53%	23%
	Used	11%	63%
Car parking facilities	Not Aware	2%	-
	Aware	37%	-
	Used	61%	-
General maintenance of site	Not Aware	14%	-
	Aware	79%	-
	Used	6%	-
Personal safety	Not Aware	18%	-
	Aware	74%	-
	Used	8%	-
Trails/footpaths - quality	Not Aware	12%	-
	Aware	47%	-
	Used	40%	-
Trails/footpaths - management	Not Aware	18%	-
	Aware	64%	-
	Used	19%	-

Rating of features

Respondents who had used features within Willesley Wood were asked to rate them.

Findings in the table below are based on mean average scores out of 5, with 1 being very poor and 5 being very good. 'Can't say' responses have been excluded from the results.

Table Q13b: Rating of features

	Mean 2001 Willesley Wood	Mean 2007 National Forest sites	Mean 2008 Willesley Wood
Information/signage on site	3.6		3.6
Seating areas	3.9	4.0	3.8
Interpretation panels/boards	-	4.1	3.6
Car parking facilities	4.0	-	3.8
General maintenance of site	4.1	-	4.0
Personal safety	3.9	-	3.9
Trails/footpaths - quality	4.1	-	4.0
Trails/footpaths - management	4.1	-	4.0

Visitors continue to rate Willesley Wood's features as either satisfactory or good. The site's mean average scores have fallen very marginally compared to seven years ago.

What visitors liked most about Willesley Wood

Visitors were asked to state what they liked most about Willesley Wood. As this question was open-ended answers have been coded. Results are detailed in the table below - 'don't know' responses have been excluded from analysis.

Table Q14: What visitors liked most about Willesley Wood

	2001 Willesley Wood	2008 Willesley Wood
Peaceful/relaxing atmosphere	25%	35%
Countryside/open spaces	24%	25%
Nice walks	25%	18%
It is local/convenient	-	6%
Scenery/views	13%	3%
Other	13%	13%
Total (base)	68	89

'Other' responses included:

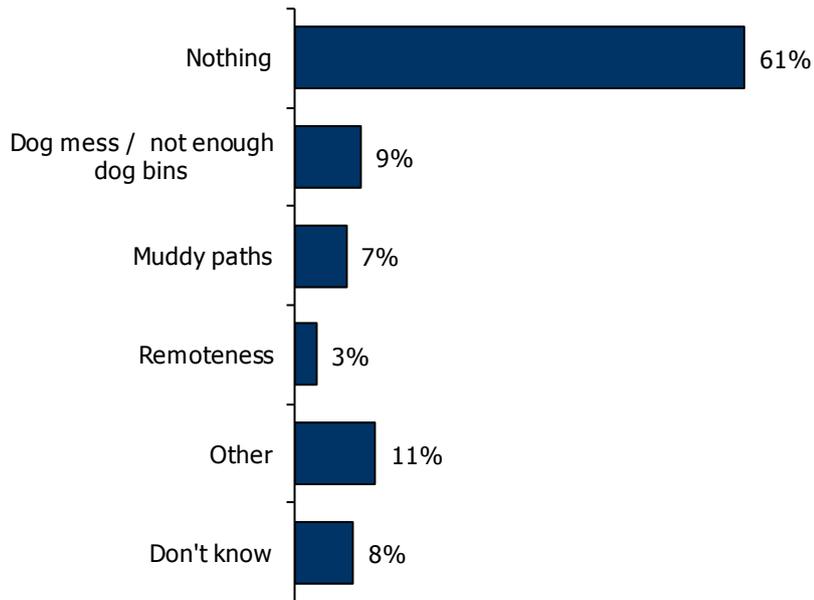
- It's safe for dogs (2)
- The public as you go round - they are always friendly (1)
- It is large and you can walk straight through (1)

What visitors disliked about the site

Visitors were asked to state what they disliked about the site. As above, this question was open-ended therefore answers have been coded.

Positively three quarters of respondents (69%) could not think of anything they disliked, either having no answer to give (i.e. don't know) or stating that there was nothing they disliked.

Chart Q15: Dislikes about the site



Base: 97

'Other' answers included:

- Dogs (2)
- Car park opening times during summer (1)
- Bikes (1)
- Gates closed too early (1)
- Gates not always closed at night (1)
- Horse flies (1)
- Litter (1)

Suggestions on how the site could be improved

Respondents were asked if they had any suggestions on how Willesley Wood could be improved. Of those interviewed, only 47 provided suggestions. As this question was open-ended answers have been coded - 'don't know' responses have been excluded from analysis.

Chart Q16: Suggested improvements

	2001 Willesley Wood	2008 Willesley Wood
Improve footpaths	-	30%
Dog bins	4%	13%
More toilets	9%	9%
More seating	4%	9%
More litter bins	4%	6%
Better signage	-	6%
Other	79%	28%
Total (base)	-	47

For clarification, suggestions relating to improving Willesley Wood's footpaths largely involved developing a circular all-abilities footpath around the lake, and reducing the muddiness of existing footpaths.

'Other' suggestions included:

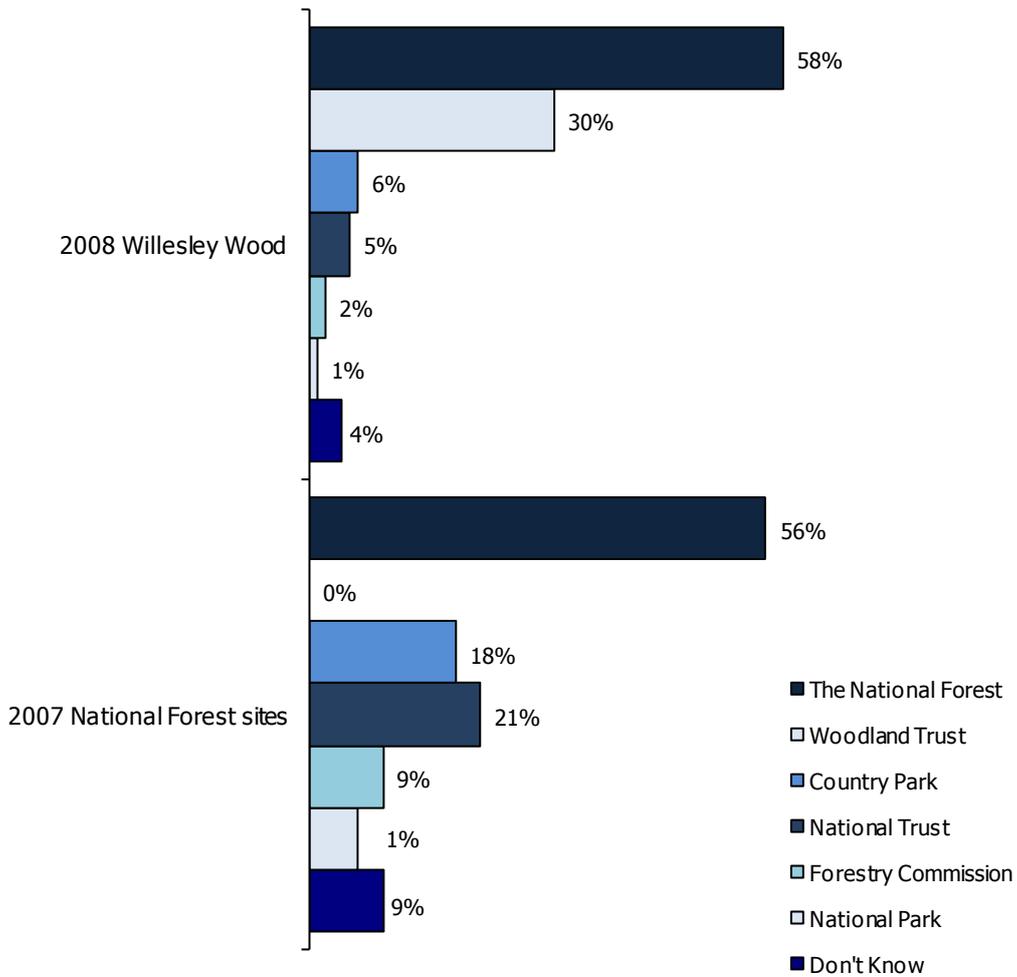
- More frequent police patrols to stop vandalism (1)
- Move the picnic tables (1)
- A children's area (1)
- Dig the canal out (1)
- Moth catching (1)
- Make fishing available (1)

4.7 Awareness and understanding of The National Forest

Awareness of The National Forest (Q18)

Respondents were shown a list of organisations and asked which organisation they felt that Willesley Wood was in. The chart below is based on multiple responses, therefore percentages add up to more than 100%.

Chart Q18: Awareness of The National Forest



Base: 2007 (740), 2008 (97)

Attribution is high with 88% correct in saying either or both The National Forest and the Woodland Trust.

Awareness of The National Forest brand (Q19)

All of the respondents (100%) stated that they had heard of The National Forest even before being interviewed - thus indicating that The National Forest name is recognised, even if awareness of the ownership/management of Willesley Wood is not as widespread.

Description of Willesley Wood (Q20)

Respondents were asked to describe Willesley Wood as a place to visit. All of the comments given were positive – a full list of verbatim answers can be found in Appendix 3 and 4.

A large number of respondents depicted the area as peaceful, tranquil and spiritual:

- "It is peaceful, a place to get your head together"
- "It is tranquil"
- "Perfect serenity"
- "Utter relaxation"
- "Spiritual"

Other comments made reference to the physical scenery and wildlife:

- "Wonderful wooded areas and good views"
- "Interesting, natural beauty"
- "Attractive"
- "I would encourage people to do bird watching here"

Understanding of the National Forest Company's role (Q21)

Visitors were shown a list of roles and were asked to identify which of them they believed were roles of the National Forest Company (NFC).

The table below is based on multiple responses, therefore percentages add up to more than 100%.

Options highlighted in red are not roles of the National Forest Company.

Table Q21: Understanding of The National Forest's role

	2007 National Forest sites	2008 Willesley Wood
Planting and managing trees	75%	81%
Enhancing and protecting wildlife	72%	64%
A forest in the making	59%	49%
Encouraging public recreation	63%	44%
Encourage alternative use of farmland	33%	36%
Stimulate the economy and create jobs	35%	21%
Contribute to reducing carbon dioxide	42%	20%
Same as the Forestry Commission	14%	18%
Contribute to the UK's timber needs	21%	16%
A visitor centre	56%	15%
Same as National Trust	18%	10%
Same as Country Parks	24%	9%
Other	6%	7%
Total (base)	740	97

Awareness of the size of The National Forest

Respondents were asked to estimate how big they thought The National Forest was in square miles. As highlighted in the table below, The National Forest falls into the 151 to 250 square miles category.

Table Q22: Awareness of the size of The National Forest

	2007 National Forest sites	2008 Willesley Wood
0 to 20 square miles	1%	2%
21 to 50 square miles	11%	12%
51 to 150 square miles	20%	13%
151 to 250 square miles	21%	22%
251 to 1,000 square miles	28%	39%
1,001 to 92,999 square miles	9%	8%
National	3%	0%
Don't know	6%	3%
Total (base)	610	97

Findings suggest that just under half (47%) of Willesley Wood visitors believe that The National Forest is larger than it actually, whereas just over one quarter (27%) of the sites visitors underestimate The National Forest's size (27%).

Perceptions of The National Forest

Table Q23: Perceptions of The National Forest

	Agree 2007 National Forest sites	Agree 2008 Willesley Wood	Disagree 2007 National Forest sites	Disagree 2008 Willesley Wood	Can't say 2007 National Forest sites	Can't say 2008 Willesley Wood
A. I had a specific reason to visit today; being in The National Forest was secondary	78%	85%	19%	12%	4%	3%
B. The National Forest is not very well known	51%	19%	42%	70%	7%	11%
C. I would recommend a visit to a National Forest site to friends and family	91%	96%	4%	1%	5%	3%
D. If I could, I would like to visit National Forest sites more often	83%	75%	8%	14%	9%	10%

The first two statements (A and B) aimed to establish visitor's current perceptions of The National Forest. Statements C and D aimed to establish visitor's experience of The National Forest.

Given the high proportion of visitors saying they would recommend The National Forest to friends and family, the NFC can capitalise upon these ambassadors and convert positive levels of satisfaction into actual word of mouth recommendation.

4.8 Willingness to support sustainable tourism

Visitors were asked to rate on a scale of 1 to 4, with 1 being not at all and 4 being greatly, which sustainable tourism initiatives they would consider using during a visit to a National Forest site. Mean scores are provided below, which exclude 'can't say' responses.

Table Q24: Willingness to support sustainable tourism initiatives

		2007 National Forest sites	2008 Willesley Wood
Use public transport more	Mean	1.6	1.7
	Count	657	84
Walk and cycle more	Mean	3.0	3.2
	Count	700	86
Use environmentally aware accommodation	Mean	2.4	2.9
	Count	516	58

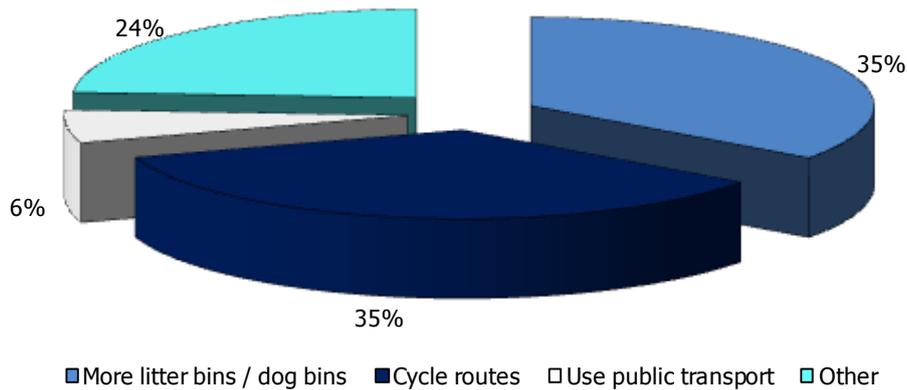
Results show that respondent's willingness to support sustainable tourism initiatives - particularly in relation to walking and cycling – is not reflected in reality, as a high proportion of visitors continue to reach Willesley Wood using cars (Q6).

Encouraging environmental friendliness

Respondents were asked what would encourage them to make their future visits to Willesley Wood more environmentally friendly. As this was an open-ended question, answers have been coded.

Only 17 visitors provided an answer to this question, which may indicate that respondents either lacked knowledge of environmentally friendly options (e.g. cycle routes or that environmental friendliness is not a burning issue for Willesley Wood visitors).

Chart Q17: Encouraging environmental friendliness



Base: 17

4.9 Additional comments (Q33)

Before their interview was completed respondents were asked if they had any additional comments. A full list of verbatim comments can be found in Appendix 3.

5. Visitor observations key findings

Previous research conducted by Loughborough University in 1998 calculated the estimated overall visitor numbers based on visitor counts at different times of the year.

We have used the same formula and definitions to calculate gross annual visitor estimates at Willesley Wood based on the visitor counts during this survey.

The type of day the counts represent have been taken into account and used to weight the visitor numbers accordingly based on visitors on:

- Bank Holidays, which comprised 2 days in the research sample in 2008 but 8 days in total throughout the year
- Summer weekends, defined as the number of weekends during the period from April 14-12 October inclusively, which comprised 5 days in the research sample but 49 days in total throughout the year
- Summer weekdays, defined as the number of weekdays during the period from April 14-12 October inclusively excluding the 3 Bank Holidays, which comprised 1 day in the research sample but 130 days in total throughout the year
- Winter, defined as the period from January 2 to April 13 and from October 13 to December 31 excluding the five Bank Holidays which fell within this period. This made up 1 research day but 178 days in total throughout the year.

To calculate an estimated number of visitors the total visitor count (as shown on page 4 of this report, Table 1) for different times of the year has been added together, divided by the number of similar types of day included in the research and then multiplied by the number of types of this day there are in a year.

For example visitor counts took part on two Bank Holiday days, totalling a count of 86 visitors across both days. This figure has been divided by 2 to give an average number of visitors on a Bank Holiday day, then multiples by 8 to give an estimated number of visitors for all the Bank Holiday days across the year.

Using this formula the estimated number of visitors has been calculated below and shows an almost four fold increase in total visitor numbers using Willesley Wood since 1998.

Estimated Visitor Totals		
Type of day	1998 estimates	2008 estimates
Bank Holidays	232	344
Weekday Summer	1299	3250
Weekend Summer*	317	2168
Winter	1274	6052
Total	3122	11,814

* This figure excludes the count for October 12 as the shift was shortened by a police operation in the wood, so has been calculated on the basis of all the other visitor counts on other summer weekend days.

6. Conclusions

- Visitor numbers have almost quadrupled over the last ten years, with the majority of visits to Willesley Wood now comprising local residents who frequently visit.
- Satisfaction levels are high given the number of regular repeat visitors, the high likelihood to recommend, the positive comments and lack of many dislikes or suggested improvements. However, the impact some dog walkers are having on others (i.e. because of dog mess) may be an issue to try and resolve.
- Willesley Wood attracts visitors from a broad spread of demographic profiles in terms of different ages, social grades and mix of gender. However the visitors tend to be older (i.e. 65 years plus) than those interviewed in The National Forest visitor attraction survey.
- The main reason for visiting is to walk a dog, with many choosing to do this in Willesley Wood on a very regular basis.
- Given the local nature of the vast majority of visitors, they are more likely to know about Willesley Wood from their local knowledge rather than any above the line marketing activities produced by the National Forest Company.
- Visitor like Willesley Wood and are positive about the site. On the other hand, their comments suggest there is little that is unusual or differentiating about Willesley Wood compared to any other wooded walk.
- Awareness of most features in the wood is much higher than actual usage. The level of usage of the seating, information / signage and interpretation boards could be due to the local nature of the majority of visitors who are visiting for a short-ish period, often to walk their dog.
- Although nothing is rated as poor, the ok or good rather than excellent scores for the features provided in the wood suggest there is still room for improvement.
- Awareness levels of the role of the National Forest Company are generally positive. However, only 49% of visitors felt that "a forest in the making" was a role of the Company. This may indicate that more needs to be done to communicate the wider role of the National Forest Company to the general public.

Q9. What is your main reason for visiting today? *(please write in code for one of the options ticked at Q8):* _____

Q10. What prompted your visit to this site? *(Please tick all applicable)*

- 1 Local knowledge / live locally 2 A National Forest leaflet 3 A National Forest Information Board
 4 Seeing a National Forest Sign 5 White on brown road signs 6 A National Forest Visitor Guide
 7 Recommendation by friends/family 8 TV or Radio 9 Advert/ Article in newspaper or magazine
 10 Tourist Information Centre 11 Internet *(specify website)* _____
 12 Other *(Please specify)* _____

Q11a. Is this your first visit to Willesley Wood? Yes 1 *(if YES, please go to Q12)* No 2

Q11b. How many times have you visited this site in the last 12 months?

- 1 Once or twice 2 Less than 10 3 10-20 4 More than 20

Q11c. If you have visited more than 10 times, how regularly do you visit?

- 1 Daily 2 Weekly 3 Monthly

Q12. How long have you spent/ do you expect to spend at this site? Hours: _____ Minutes: _____

Q13. We are interested in your opinion of various facilities in/ around Willesley Wood. If used, how do you rate the following: *(On any option, if 'not aware' please do not rate that facility at Q13b, however if aware or used please go to Q13b).*

	Q13a			Q13b					
	Not aware	Aware	Used	Very Poor	Poor	Satisfactory	Good	Very Good	Can't Say
a. Information/signage on site	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
b. Seating areas	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
c. Interpretation panels/boards	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
d. Car parking facilities	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
e. General maintenance of site	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
f. Personal safety	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
g. Trails/footpaths - quality	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06
h. Trails/footpaths - management	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 01	<input type="radio"/> 02	<input type="radio"/> 03	<input type="radio"/> 04	<input type="radio"/> 05	<input type="radio"/> 06

Q14. What did you like most about this site?

Q15. What did you dislike about this site?

Q16. Do you have any further suggestions on how this site could be improved?

Q17. What would encourage you to make your future visits to this area more environmentally friendly?
(e.g. Cycle routes to the site, Cycle racks on car park etc..?)

About The National Forest:

Q18. Which of the following do you feel you are in? ... (please tick all applicable)

- | | | | | | |
|--------------------|-----------------------|--------------------------|-----------------------|---------------------|-----------------------|
| National Park site | <input type="radio"/> | National Forest site | <input type="radio"/> | National Trust site | <input type="radio"/> |
| Country Park site | <input type="radio"/> | Forestry Commission site | <input type="radio"/> | Woodland Trust Site | <input type="radio"/> |
| Don't know | <input type="radio"/> | | | | |

Q19. If the interviewee does not know that they are at a National Forest site, please inform them that they are and ask:

Before this interview today, had you heard of The National Forest? Yes No

Q20. How would you describe National Forest woodlands, for e.g. Willesley Wood, as a place to visit? (e.g. physical, emotional aspects)

Q21. Which of the following describe The National Forest and its role? (please tick all applicable)

- | | |
|---|---|
| <input type="radio"/> Planting and managing trees | <input type="radio"/> Same as the Forestry Commission |
| <input type="radio"/> Stimulate the economy and create job | <input type="radio"/> Enhancing and protecting wildlife |
| <input type="radio"/> Same as Country Parks | <input type="radio"/> Encouraging public recreation |
| <input type="radio"/> A visitor centre | <input type="radio"/> Contribute to reducing carbon dioxide |
| <input type="radio"/> Contribute to the UK's timber needs | <input type="radio"/> A forest in the making |
| <input type="radio"/> Encourage alternative use of farmland | <input type="radio"/> Same as National Trust |
| <input type="radio"/> Other (please write in) _____ | |

Q22. How big do you think The National Forest is approximately in square miles?

- | | | |
|--|--|---|
| <input type="radio"/> 0 to 20 square miles | <input type="radio"/> 20 to 50 square miles | <input type="radio"/> 50 to 100 square miles |
| <input type="radio"/> 100 to 250 square miles | <input type="radio"/> 250 to 1000 square miles | <input type="radio"/> 1000 to 92,999 square miles |
| <input type="radio"/> Nationally, i.e. 93,000 square miles | | |

Q23. To what extent do you agree or disagree with the following statements about The National Forest? (Please answer all)

	Disagree	Agree	Can't Say
a. I had a specific reason to visit today; being in The National Forest was secondary	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. The National Forest is not very well known	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. I would recommend a visit to a National Forest site to friends and family	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
d. If I could, I would like to visit National Forest sites more often	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q24. To what extent would you be willing to consider the following during a visit to a National Forest site?...

	< Not at all	Greatly >	Can't say
a. Use public transport more	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
b. Walk and cycle more	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
c. Use environmentally aware accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

About You:

Q25. What is the occupation of the head of your household/ chief wage earner?

(If retired please write retired and the last occupation) _____

For official use only					
A	B	C1	C2	D	E

Q26. Please indicate your age and gender:

- 16-24 25-34 35-44 45-54 55-64 65 & over

Male 1 Female 2

Q27. Which one of these groups do you belong to?

- Asian: Asian British/Indian/Pakistani/Bangladeshi/any other Asian background 1
- Black: Black British/Caribbean/African/ any other Black Background 2
- Chinese 3
- Mixed ethnic background (Asian/White, Asian/Black African, Asian/Black Caribbean) 4
- White: White (Welsh, Irish, Scottish, English) 5
- Other ethnic group 6

Q28a. Do you have a disability? Yes 1 (go to Q29b) No 2 (go to Q30)

Q29b. Please can you briefly state the nature of your disability?

Q30. Would you like more information about The National Forest?

Yes 1 No 2 (Go to Q32)

Q31. Which of the following would you like a copy of? (show copies, tick all that apply and write contact details in the section below)

Forest Scene newsletter 1 Other NF leaflets 2

Title: _____ Initials: _____ Surname: _____

Address: _____

Town: _____

County: _____

Postcode: _____

Telephone: _____ E-mail: _____

Q32. Finally, as part of our quality control procedure, a research supervisor may contact you in order to confirm the accuracy of the interview and to ensure you were happy with the interview. If not given above, would you be prepared to give your contact details for this purpose? (please provide telephone number)

Yes 1 (please put in detail below if not above) No 2 (Thanks and close)

Contact Name: _____ Telephone: _____

Q33. Please use the space below to make any additional comments you may have:-

THANK RESPONDENT AND END INTERVIEW

=====

Interviewer Declaration I confirm that I personally carried out this interview with a person or persons previously unknown to me in accordance with the survey instructions and the Market Research Society's Code of Conduct and that I asked all the necessary questions and correctly recorded the answers given.

Signed: _____ Date: _____

For official use only: Name of interviewer:



Appendix 2: Verbatim - descriptions of Willesley Wood

A really good place away from traffic
Attractive
Beautiful, lovely
Calm and peaceful
Calming
Don't know (21)
Excellent
Fantastic
Good and tranquil
Good and nice
Great (2)
I would encourage people to do bird watching here
Interesting, natural beauty, peaceful
It is as nature intended.
It is calm and peaceful
It is good
It is good and quiet
It is good for walking
It is nice and peaceful
It is not overdone or developed
It is peaceful (2)
It is peaceful, a place to get your head together
It is peaceful, it is ideal
It is tranquil
It is very good
It is very good and peaceful
It is very tranquil
It is wonderful
It's adequate for what I want
It's OK now but will it always be?
It's quiet
It's quiet and peaceful - calming
It's very good and natural
Just enjoyment
Just peaceful (2)
Keep it, let trees grow
Natural beauty, peaceful
Nice
Nice & peaceful
Peace & Quiet (2)
Peaceful (6)
Peaceful, good birds, relaxing and gentle

Perfect serenity
Physical
Place to get lost in
Pleasant (4)
Quietness
Quite nice - when the sun shines I walk further
Relaxation Can't describe.
Relaxing, good places for walks
Rural
Serenity
Serenity and peace
Spiritual
Take the stress out of life
Total relaxation
Utter peace
Utter relaxation
Very Good (3)
Very good / calming
Very good and improving (2)
Wonderful wooded areas, good views, paths to walk

Appendix 3: Verbatim - additional comments

A beautiful site- long may it continue to be so!
Are they really catering for maintenance in the future?
Could have a toilet here and better car park and something for kids to go on as well as walk
Don't change it
Great place to visit
Great to have
I enjoy living here and I like The National Trust
It is all well-managed
It would be nice to have a footpath on main road
It's a fine river
It's a lovely day
Just leave at it is
Just peace
Similar research required for Hicks lodge site
Start digging the canal to use for the boats and to connect it up with the main canal at Snarestone
The gates shut too early at 7pm when it's still light - but in the winter at 4pm which is too early
There need to be signs on main roads directing into site
They need to control the ivy
This place is perfect
Wonderful place