

All Forests Survey 2 2013

Main report

TNS
June 2014



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1. Executive summary

1.1 Key findings

- 9.1 million visits are taken annually to forests on Scotland's National Forest Estate¹.
- An average of £35 (including accommodation) is spent during trips taken to visit forests.
- 33% of visits are taken by people on a holiday or short break while 35% are taken by people on a shorter excursion who live within 6 miles of the forest they are visiting.
- The most popular activities on visits to forests are walking (72% of visits) and cycling and mountain biking (8% of visits).

1.2 Background

- Forestry Commission Scotland (FCS) serves as the Scottish Government's forestry department and is the largest provider of outdoor recreation in Scotland. Forestry Commission Scotland manages Scotland's National Forest Estate on behalf of Scottish Ministers.
- The first All Forests Survey (AFS1) measured the volume and profile of visitors to Scotland's National Forest Estate between 2004 and 2007, providing baseline data. The second survey (AFS2) was commissioned in 2012 to update these measures.

1.3 About the survey

- Fieldwork for the survey was conducted over the 12 months from November 2012 to October 2013. During this period, data was collected from a network of 185 automatic vehicle and trail counters and manually, through observation and interviews, with over 400 days of fieldwork undertaken. A total of 1,970 visitor interviews were conducted in forests across Scotland's National Forest Estate.
- Given the scale of the survey exercise, data may be analysed at the national level and by sub-groups including visitors to each of the 10 forest districts.

¹ Scotland's National Forest Estate covers nearly 9% of the country, extending to over 650,000 ha.

1.4 Estimated visitor numbers to Scotland's National Forest Estate

- An estimated 9.1 million visits are taken annually. This is around 5% more than the estimate of 8.7 million annual visits obtained in AFS1 (June 2004 to June 2007).
- Across the ten forest districts the largest volumes of visits are recorded at forests in Moray & Aberdeenshire (19% of all visits), Inverness, Ross & Skye (16%) and Scottish Lowlands (12%).
- Around 1.3 million visits are taken annually to forests within the two National Parks, 2.4 million are taken to Forest Parks and 1.2 million are taken to forests within the Central Scotland Green Network area.

1.5 Profile of visitors to Scotland's National Forest Estate

- The average age of a visitor (including children) is 46. This average varies by forest district with the youngest age profile in Moray & Aberdeenshire (average age 38) and the oldest in Cowal & Trossachs (average age 51).
- Just 0.2% of visitors are members of the Black, Asian and Minority Ethnic (BAME) population, a significantly lower proportion than found within the wider Scottish population (4%). A similar low proportion of BAME visitors were recorded in AFS1 (1%).
- 6% of visitors have a disability, a lower proportion than in the Scottish population as a whole (19%). By comparison, in AFS1 5% of visitors were recorded as having a disability.
- 2% of visitors live in areas which are in the bottom 10% of the Scottish Index of Multiple Deprivation (i.e. the most deprived areas) while 11% live in the top 10%, least deprived areas.
- 77% of visitors live in Scotland, 15% live elsewhere in the UK and 8% are from overseas. By comparison, in AFS1 85% of visitors lived in Scotland, 14% lived elsewhere in the UK and 1% were from overseas.
- Overall 33% of visitors visit while they are on an overnight holiday or short break, 35% are on a day trip travelling less than 6 miles to reach the forest and 32% are on a day trip from further afield. By comparison, in AFS1 18% of visitors were on an overnight trip, 49% were on a local day trip and 33% were on a day trip from further afield.

1.6 Visit characteristics

- The highest proportions of visits are taken in June, July and August (33% of all annual visits are taken over these months) while significantly fewer visits are taken in the winter months, particularly January (5% of annual total) and December (4% of annual total).
- Around three-quarters of visitors are on a repeat visit to the forest they are being interviewed in (73%). By comparison, in AFS1 84% of visitors were on a repeat visit.
- Over two-fifths of visitors take part in dog walking during their visit (43%) while 29% take part in other walking without a dog. Around 8% of visits include cycling or mountainbiking – 6% on waymarked trails, 2% not on waymarked trails. Other activities include just passing through (5%), seeing something in the woodland such as wildlife or sculpture (4%) and picnicking (3%).
- The average visit duration is 89 minutes.

- The average distance travelled to a forest is 17 miles. However distances vary from an average of 8 miles in the Scottish Lowlands to 24 miles in Lochaber.
- The majority of visits are taken by car (85%) while around 1 in 10 are taken on foot (11%). A notably higher proportion of visits to forests in the Scottish Lowlands are taken on foot (44%).
- 77% of visitors spend money during their forest trip (includes all money spent outside the forest). Average spend was £35 with around half (48%) of all expenditure on overnight accommodation while 24% is spent on food and drink and 20% is spent on transport.

1.7 Visiting Scotland's National Forest Estate while on holiday in Scotland

- A third (33%) of visitors are on a holiday or short break.
- The proportion of visitors on a holiday or short break varies somewhat between forest districts, representing around three-quarters of visitors in Lochaber, over half in West Argyll and Inverness, Ross and Skye but much lower proportions in Moray & Aberdeenshire (8%) and the Scottish Lowlands (4%).

2. About the survey

2.1 Forestry Commission Scotland

Forestry Commission Scotland (FCS) serves as the Scottish Government's forestry department and is the largest provider of outdoor recreation in Scotland. Its mission is to protect and expand Scotland's forests and woodlands and increase their value to society and the environment.

Everyone has a right of responsible access to the Scottish countryside and this includes the woodland and forests that cover one sixth of Scotland. A significant proportion of this land is within the publicly owned National Forest Estate managed by Forestry Commission Scotland. The estate covers a total of 652,000 hectares of which 480,000 hectares are woodland.

Over several decades, FCS have developed Scotland's largest suite of outdoor recreation infrastructure. Scotland's National Forest Estate is a place for all types of recreation from quiet reflection and walking to international sporting competitions such as car-rallying and mountain biking. It contributes to active lifestyles and improved wellbeing as well as nature conservation, timber production and provides opportunities for others to develop businesses.

In addition, FCS supports other woodland owners with grants, felling licences, advice and regulation. It promotes the benefits of forests and forest products, as well as advising Ministers on forestry policy.

FCS believes that the management of Scotland's National Forest Estate is not an end in itself but rather a means to an end. The ultimate outcomes sought through management of the Estate include improved health and well-being that arise from access to and enjoyment of national forests. FCS wishes to increase the opportunities for everyone to enjoy visits to the National Forest Estate and will use this survey to assess both the number and diversity of visitors.

2.2 Survey Background

2.2.1 Scottish Forestry Strategy

The Scottish Forestry Strategy was published in October 2006, providing the Scottish Government's vision for the future of forestry. It proposes a forestry sector that is diverse and strong; in tune with the environment; employing many people in a wide range of enterprises; and providing the many other services and benefits that people need.

Access and health is a key theme in the strategy, specifically:

- Making access to woodlands easier for all sectors of society.
- Using woodland access to help improve physical and mental health in Scotland.
- Providing a greater range of ways for people to enjoy woodlands.

The volume of visits taken to forests, the profile of the types of people taking visits to forests and how visits are enjoyed are all key measures of progress against the target in the strategy.

The first All Forests Survey (AFS1) measured the volume and profile of visitors to forest between 2004 and 2007 to provide baseline data on these areas. The second survey (AFS2) was commissioned in 2012 to update these measures.

The data collected in the All Forests Survey compliment the Scottish Government National Performance Indicator (NPI) 41 which is 'to increase the proportion of adults making one or more visits to the outdoors per week' as measured using the Scottish Household Survey.

2.2.2 All Forests Survey 2 (AFS2)

AFS2 was commissioned to provide up to date measures of the volume and profile of visitors to Scotland's National Forest Estate. TNS were commissioned to undertake the study which involved a 12 month fieldwork period from November 2012 to October 2013.

This report provides a summary of the main survey results. A series of factsheets providing the results for each forest district, other key geographical areas and users groups have also been produced and are available from <http://scotland.forestry.gov.uk/managing/work-on-scotlands-national-forest-estate/tourism-and-recreation/profile-of-forest-visitors>.

2.3 Methodology

This section provides a summary of the survey and analysis approaches used. Copies of the fieldwork materials used are provided in Appendix 2.

2.3.1 Use of automatic vehicle and trail counters

Data was collected from a network of 185 automatic counters, including 124 vehicle counters at key car parks and entrances and 61 trail/people counters.

	Vehicle counters	Trail counters
Cowal & Trossachs	13	-
Dumfries & Borders	15	-
Galloway	22	-
Inverness, Ross & Skye	22	-
Lochaber	8	-
Moray & Aberdeenshire	11	2
North Highland	4	-
Scottish Lowlands	2	59
Tay	17	-
West Argyll	10	-
Total	124	61

Automatic counters collect data continuously, 24 hours per day and 365 days per year, and therefore provide very robust data on visitor flows. As described in the section below, manual counts of visitors were undertaken on a sample of days at counter locations to check counter accuracy and record details on vehicle occupancy rates. This manually collected data was then applied to the automatic counts to convert them into robust estimates of annual visitor numbers.

2.3.2 Fieldwork

A total of 400 days of fieldwork were undertaken. During these days fieldworkers manually counted visitors entering and leaving the forest and undertook interviews with a random sample of visitors at the end of their visit. A total of 1,970 interviews were completed over the 12 months.

	Fieldwork days	Interviews achieved
Cowal & Trossachs	27	124
Dumfries & Borders	43	142
Galloway	41	133
Inverness, Ross & Skye	78	400
Lochaber	21	104
Moray & Aberdeenshire	31	274
North Highland	17	84
Scottish Lowlands	73	385
Tay	36	227
West Argyll	33	91
Total	400	1,970

2.3.3 Data analysis and grossing

Full details of the approaches used to analyse the survey data and produce estimates of total visits are provided in Appendix 3. The following summarises the stages followed:

Estimating volumes of visits by forest access point – surveyed sites

- At forest entrances with automatic counters in place, manual counts were undertaken to establish the average number of passengers per vehicle. This information was then used to calibrate the counter data, converting it into accurate estimates of annual visits using the entrance.
- At entrances with no automatic counters in place, manual counts of visitors entering and leaving were undertaken on a representative sample of days and during different time periods. The manual counts undertaken on these days were then extrapolated to produce an estimate of annual visits using the entrance.

Estimating total volumes of visits by forest - surveyed sites

- Estimates of total visits to each forest included in the survey fieldwork were obtained by totalling the estimated volume of visits to each surveyed access point (obtained from steps above). A low, arbitrary estimate was applied to any low usage entrances not included in the survey fieldwork (informed through consultation with forest district staff).

Estimating total volumes of visits where no surveying was undertaken

- It was not feasible for fieldwork to be undertaken at every FCS forest so the volumes of visits taken at locations where no survey work was undertaken were estimated.
- These estimates were produced using data from the closest equivalent surveyed sites within the same forest district. This process was informed using input from forest district staff to stratify forests and access points into different levels of usage (using a high, medium, low banding). Typical throughput levels in each 'strata' were then applied to entrances in the forests not included in the survey to allow estimates of annual visitor numbers to be produced.

Estimating total volumes of visits to all forests

- Following the stages above, an estimate of total annual visits was produced for every forest on Scotland's National Forest Estate. These estimates were then totalled to produce an overall Scottish estimate, totals by forest district and totals for other geographical areas.
- In finalising estimates for each forest district, where necessary additional estimates of visits taken by users of Long Distance Routes and special event attendees were added to totals.

Weighting interview data

- Data from the interviews conducted with visitors was weighted using the estimates of total annual visits to each forest district to improve the representativeness of these findings.

2.3.4 Comparing results with AFS1

As mentioned above, AFS2 estimates of total volumes of visits taken to Scotland's National Forest Estate were based on data from a large network of automatic counters, calibrated using data collected using manual counting methods.

Using automatic counters helps to improve the accuracy of data with counts based on the continuous measurement of visitor flows rather than relying upon data collected during relatively short sample time periods which are then 'grossed up' to cover the full year.

It should be noted that AFS1 did not use automatic counter data to the same extent.

As such, while data from the more recent survey is much more accurate than that obtained previously, some caution must be taken when comparing findings due to the change in methods.

Identical face to face exit interview methods were used in both surveys to collect data on the profile of visitors and their behaviour during visits. Also, in both surveys data collected in the interviews was weighted using the estimates of total visits to each forest district to increase the representativeness of the national results.

Also, it should be noted that between AFS1 and AFS2 a number of changes were made to the boundaries of the Scottish forest districts reducing the total number of areas from 15 to 10. Any forest district level results from AFS1 are presented using the new forest district boundaries.

2.3.5 Note on rounding

Note that in the sections that follow, results are presented as estimates of total visits to forests (across Scotland and by forest district) and percentages of totals.

In some cases percentages do not total 100% due to the effects of rounding (i.e. the percentages shown total 99% or 101%).

3. Number of visits to Scotland's National Forest Estate

This section contains key survey results including estimates of the total annual volume of visits taken and estimates by forest district, by other geographical areas and for key demographic and visitor groups.

3.1 Total visits to Scotland's National Forest Estate

An estimated 9.1 million visits are taken annually.

This estimate is around 5% more than the estimate of 8.7 million annual visits obtained in the previous All Forests Scotland survey which was undertaken over three years from June 2004 to June 2007.

3.2 Estimated visits by Forestry Commission Scotland forest districts

Table 1 below provides estimates of annual visits within each of the Scottish forest districts. The largest volumes of visits were recorded at forests in **Moray & Aberdeenshire** and **Inverness, Ross & Skye**.

TABLE 1 – ESTIMATED ANNUAL VISITS BY FOREST DISTRICT

	Volume of visits ('000s)	% of total visits
Cowal & Trossachs	802	9
Dumfries & Borders	733	8
Galloway	906	10
Inverness, Ross & Skye	1,495	16
Lochaber	670	7
Moray & Aberdeenshire	1,767	19
North Highland	394	4
Scottish Lowlands	1,078	12
Tay	816	9
West Argyll	398	4
Total Scotland	9,059	100

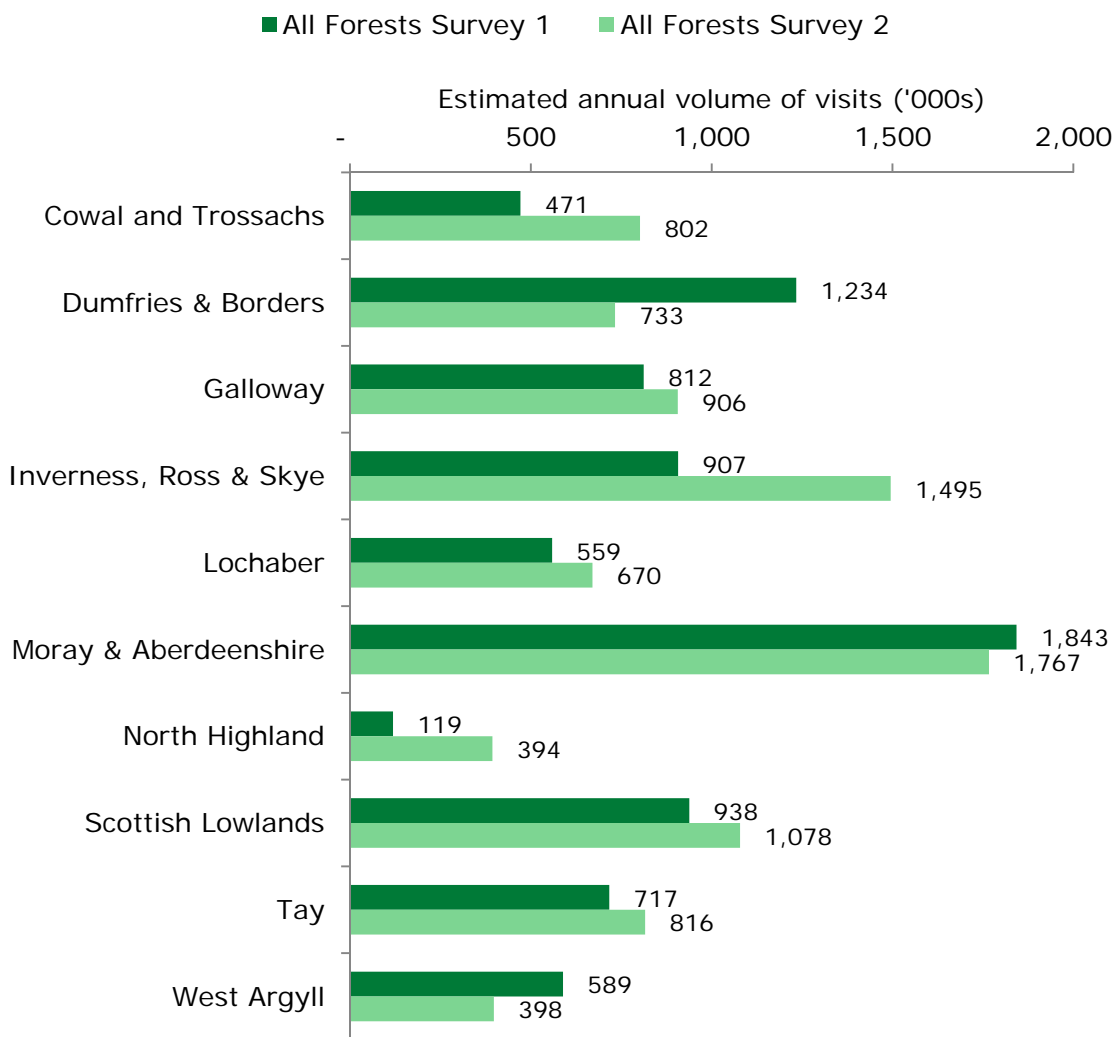


More detail on the estimated volume of visits taken within each forest district, including estimates for individual forests are provided in Appendix 1.

Figure 1 compares annual visit estimates obtained from the 2013 AFS2 survey with estimates from the previous AFS1 survey undertaken from June 2004 to June 2007.

As described in section 2, the 2013 survey used different approaches from those used in the previous survey, with greater use of automatic counters to improve the accuracy of data. Given this change in methodology, any comparisons must be made with caution.

FIGURE 1 – ESTIMATED VOLUME OF VISITS BY FOREST DISTRICT AFS1 (2004-2007) AND AFS2 (2013) – RESULTS IN THOUSANDS



3.3 Estimated visits by other recognised geographical areas

Table 2 includes estimates of annual visits to forests which are also within other recognised geographical areas.

An estimated 1.3 million visits are taken to forests within Scotland's two National Parks while around a quarter of all forest visits (2.4 million) are taken to forests within the six areas designated as Forest Parks.

An estimated 1.2 million visits are taken to forests within the Central Scotland Green Network (CSGN) area.

TABLE 2 –ESTIMATED ANNUAL VISITS BY NATIONAL PARK, FOREST PARK AND CSGN AREA

	Volume of visits ('000s)	% of total visits
Forests in National Parks	1,285	14
Cairngorms	570	6
Loch Lomond & The Trossachs	715	8
Forest Parks	2,439	27
Argyll	220	2
Galloway	578	6
Glenmore	529	6
Queen Elizabeth	340	4
Tay	343	4
Tweed Valley	430	5
Forests in CSGN area	1,173	13

Note - the above geographical areas overlap e.g. Argyll Forest Park is within Loch Lomond & The Trossachs NP. For further details on these areas please refer to the following websites:

- National Parks - <http://www.scotland.gov.uk/Topics/Environment/Countryside/16131>
- Forest Parks - <http://scotland.forestry.gov.uk/forest-parks/>
- CSGN - <http://www.centalscotlandgreennetwork.org/>

3.4 Estimated visits to Scotland's National Forest Estate by key population groups and visit types

Table 3 includes estimated annual volumes of visits by key demographic groups and visitor types.

Over half of visits are taken by people aged 45 or over (56%). Also, it is notable that the vast majority of visitors are not members of the Black, Asian and Minority Ethnic Population while only around 1 in 20 visitors (6%) have a long term illness or disability.

A third of annual forest visits (c.2.9 million visits) are taken by tourists on a holiday or short break while larger volumes are taken by local visitors.

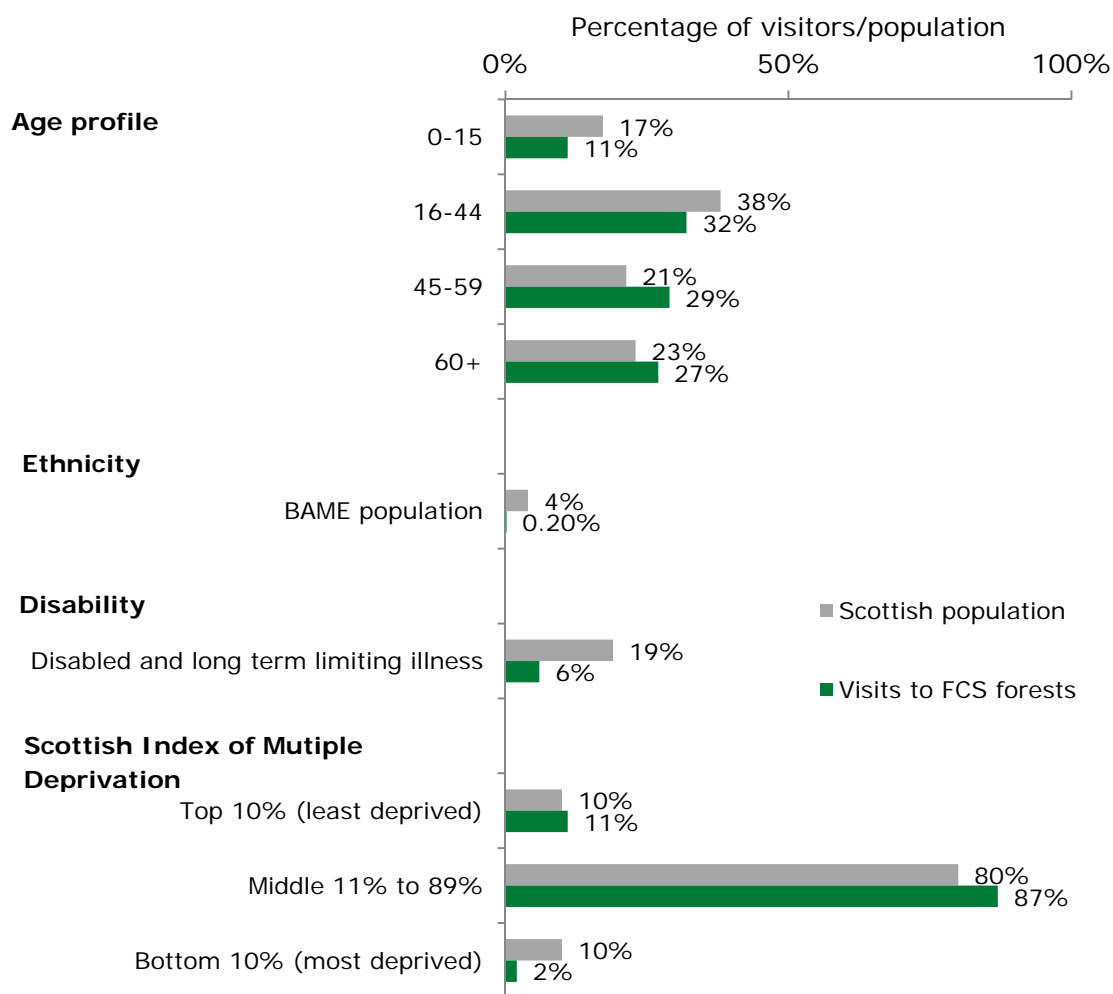
TABLE 3 – ESTIMATED ANNUAL VISITS BY KEY DEMOGRAPHICS AND VISIT TYPE

	Volume of visits ('000s)	% of total visits
Age		
Under 5	270	3%
5 to 10	450	5%
11 to 15	270	3%
16 to 24	540	6%
25 to 34	1,081	12%
35 to 44	1,261	14%
45 to 59	2,611	29%
60+	2,431	27%
Ethnicity		
Black, Asian & Minority Ethnic	22	0.2%
White	8,933	99.8%
Disability		
Any	508	6%
None/ prefer not to say	8,347	93%
Index of Multiple Deprivation		
Top 10%	961	11%
Mid 11% to 89%	7,785	87%
Bottom 10%	209	2%
Place of residence		
Urban	3,861	43%
Rural	3,576	40%
Other	1,518	17%
Type of visits		
Local day visit (<6 miles)	3,109	35%
Other day visit	2,912	32%
Tourist	2,930	33%
Activity		
Dog walking	3,880	43%
Other walking	2,596	29%
Cycling/Mountain biking	764	8%
Seeing something in forest (e.g. wildlife/ sculpture/scenery)	376	4%
Other activities	1,339	15%

Compared to the Scottish population as a whole, visitors to Scotland’s National Forest Estate are more likely to be aged 45 or over (Figure 2).

The proportions of visitors who are members of the BAME population, have a disability or long term illness or live in areas classified as being in bottom 10% of the Scottish Index of Multiple Deprivation are lower than amongst the wider population.

FIGURE 2 – COMPARISON OF KEY DEMOGRAPHICS – FCS FOREST VISITORS AND SCOTTISH POPULATION



Further details on the profile of visitors to Scotland’s National Forest Estate are provided in the next section.

4. Profile of visitors to Scotland's National Forest Estate

This section contains key survey results regarding the profile of people who visit including demographics, place of residence and the nature of trip being taken when forests are visited.

4.1 Party composition

While the proportion of male and female visitors is equal at the national level (Table 4), at the forest district level, marginally more men visit forests in **Galloway** and the **Scottish Lowlands** while a slightly higher proportion of visitors to forests in **Lochaber** are female.

TABLE 4 - PARTY COMPOSITION (AGE & GENDER) BY FOREST DISTRICT (%)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Gender											
Male	48	49	54	51	46	50	50	54	53	48	50
Female	52	51	46	49	54	50	50	46	47	52	50
Age (yrs)											
<5	1	2	3	4	3	8	3	4	3	6	3
5 to 10	3	2	6	7	4	9	7	5	3	3	5
11-15	3	1	4	3	2	5	5	3	5	3	3
16-24	4	6	7	7	11	6	5	10	7	4	6
25-34	4	34	19	13	17	16	12	14	6	9	12
35-44	12	12	17	20	14	18	17	10	14	12	14
45-59	44	29	17	23	25	20	27	17	18	29	29
60+	30	14	25	22	25	19	24	36	43	34	27
Average age	52	41	43	42	44	38	44	46	51	49	46

Abbreviated forest district names

C&T – Cowal & Trossachs

D&B – Dumfries & Borders

GAL – Galloway

IRS – Inverness, Ross & Skye

LOC – Lochaber

M&A – Moray & Aberdeenshire

NH – North Highland

SL – Scottish Lowlands

TAY - Tay

WA – West Argyll

The average age of a visitor is 46. However, this average varies by forest district with the youngest age profile in **Moray & Aberdeenshire** (average age 38 – 22% of visitors aged under 16) and the oldest in **Cowal & Trossachs** (average age 51 – 74% of visitors aged 45+).

Comparing these results to the 2004 - 2007 AFS1 survey, the proportion of visitors in the 60 and over age group has increased from 17% to 27% while the proportion aged 35 to 44 decreased from 20% to 14%.

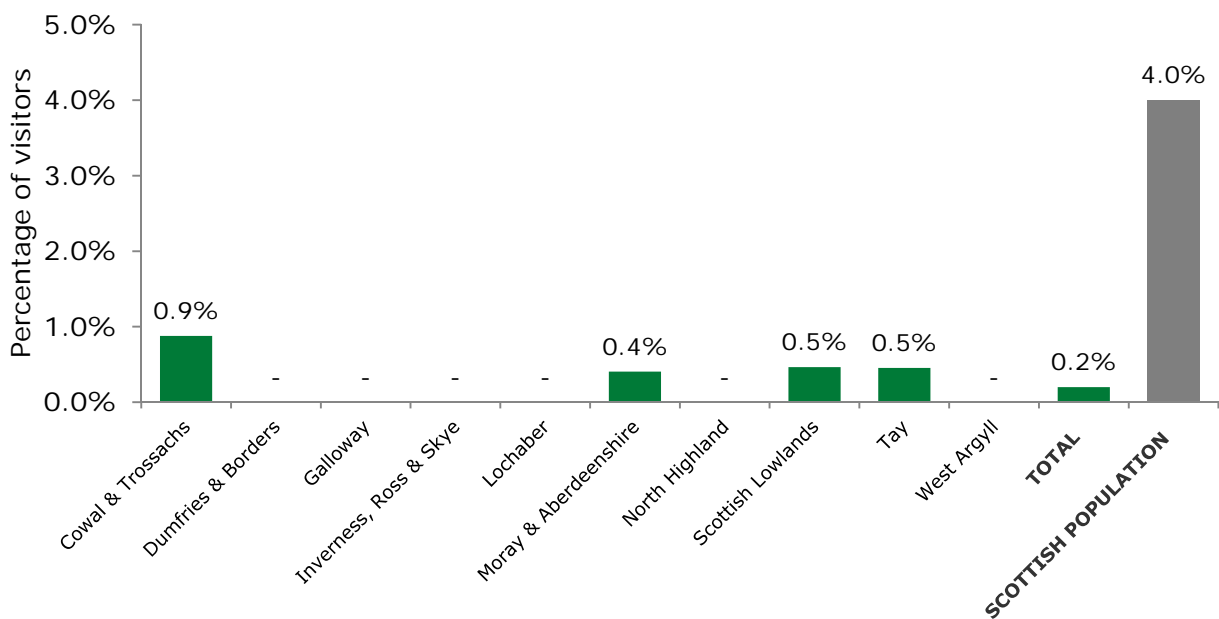
4.2 Ethnicity

Less than half a percent of visitors (0.2%) are members of the Black, Asian and Minority Ethnic (BAME) population, a significantly lower proportion than found within the Scottish population (4%).

As shown below, in some forest districts, none of the visitors included in the survey were members of the BAME population while the highest level was recorded in **Cowal & Trossachs** (0.9%).

A similar low proportion of BAME visitors were recorded in the 2004 - 2007 AFS1 survey (1%).

FIGURE 3 – VISITOR PROFILE - BAME POPULATION (%)



4.3 Disability

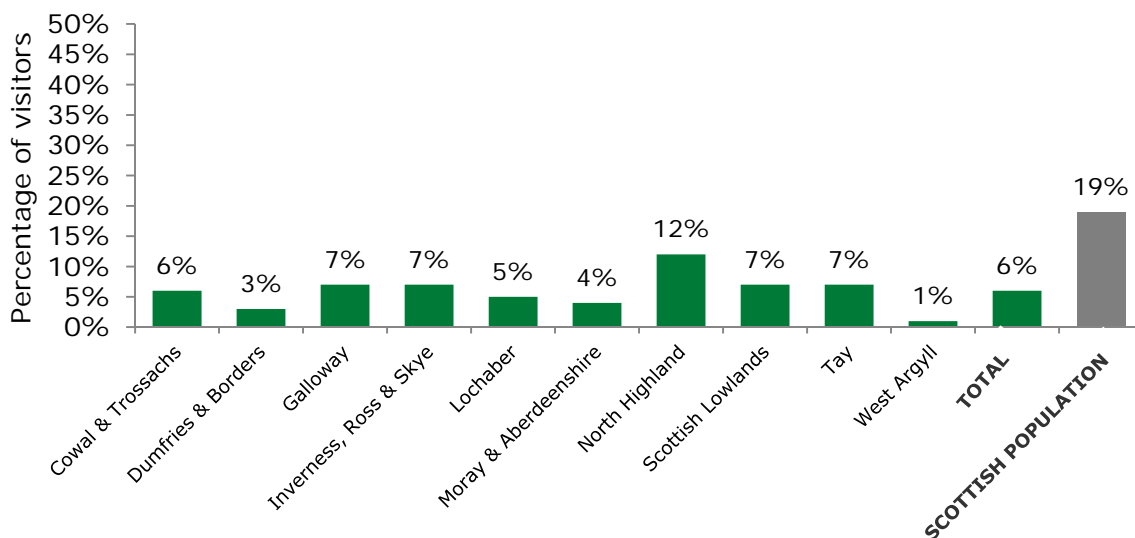
To provide information to help FCS to monitor the equality and diversity of visitors, a series of questions were asked regarding disability, religion and beliefs and sexual orientation. Given their sensitive nature, these questions were asked using a self-completion approach so that respondents could provide a response in confidence, not seen by the interviewer. Respondents were also told that they could skip these questions without answering them if they preferred to do so.

Overall 6% of visitors have a disability. This is a lower proportion than in the Scottish population as a whole (19%).

The proportion of visitors with a disability varies somewhat by forest district from 1% of visitors in **West Argyll** to 12% in **North Highland**.

By comparison, in the 2004 - 2007 AFS1 survey 5% of visitors to Scotland's National Forest Estate were recorded as having a disability.

FIGURE 4 – VISITOR PROFILE – DISABILITY (%)



As shown in Table 5, around half of visitors who stated that they had a disability stated that this was a physical disability (49%) and 32% stated that they had a long term illness, disease or other condition.

TABLE 5 – NATURE OF DISABILITY (%)

	Visitors with a disability
Physical	49
Long-term illness/disease/condition	32
Other	11
Hearing	9
Mental health	4
Sight	1
Learning disability/difficulty	1

4.4 Religion and sexual orientation

The 2013 AFS2 survey also asked respondents to provide details regarding religion and beliefs and sexual orientation. The key national results are provided in Tables 6 and 7 below.

TABLE 6 – VISITOR PROFILE – RELIGION AND BELIEFS (%)

	Total visitors
None	50
Church of Scotland	25
Roman Catholic	8
Other Christian	12
Muslim	<1
Buddhist	<1
Jewish	<1
Any other religion or belief	1
Would prefer not to disclose	3

TABLE 7 – VISITOR PROFILE – SEXUAL ORIENTATION (%)

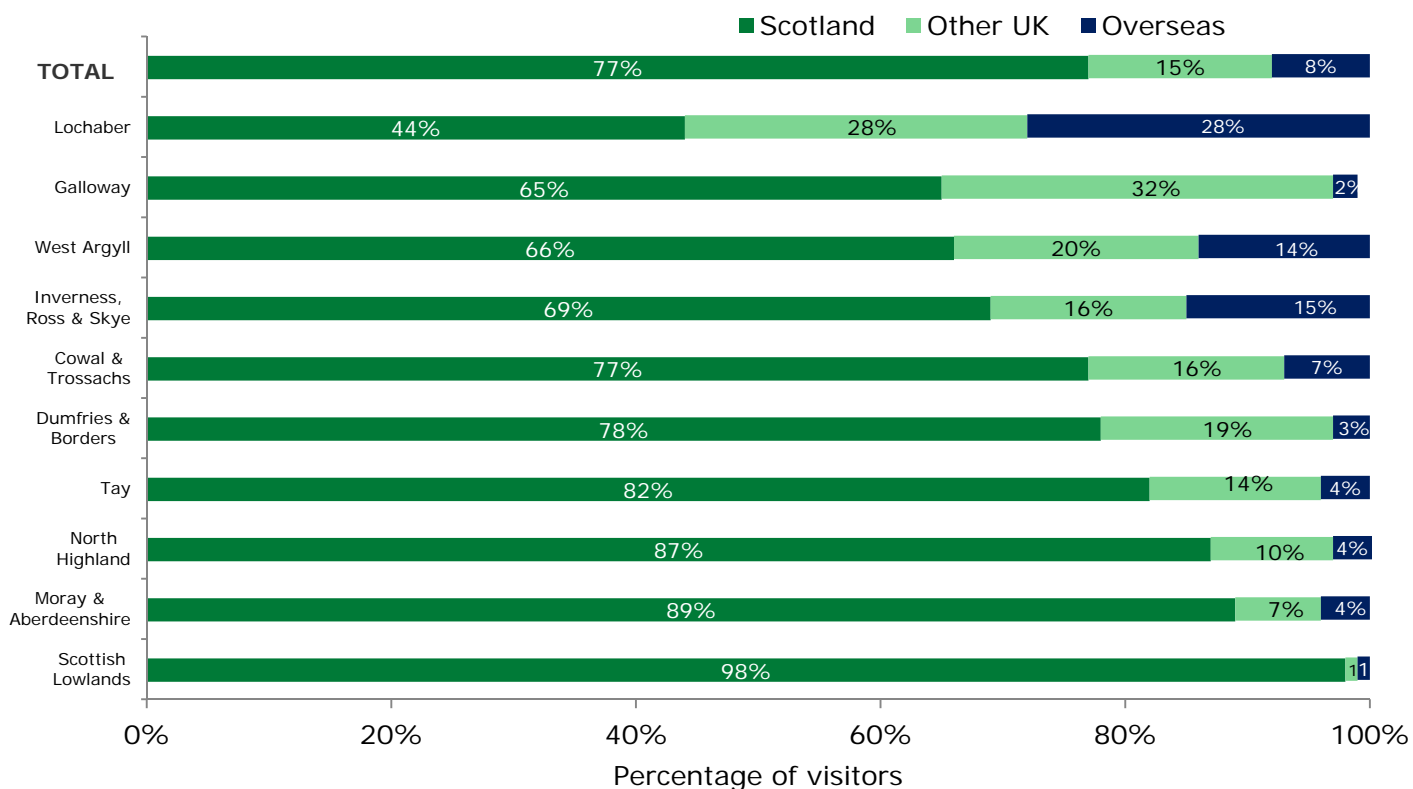
	Total visitors
Hetrosexual	90
Gay man	<1
Gay woman/ lesbian	1
Bisexual	<1
Would prefer not to disclose	8

4.5 Place of residence

Overall 77% of visitors live in Scotland, 15% live elsewhere in the UK and 8% are from overseas. By comparison, in the 2004 - 2007 AFS1 survey 85% of visitors lived in Scotland, 14% lived elsewhere in the UK and 1% were from overseas.

As shown in Figure 5, the origin of visitors varies between the forest districts with a higher proportion of visits to forests in the **Scottish Lowlands, Moray & Aberdeenshire, North Highland** and **Tay** taken by people who live in Scotland, more visits to forests in **Galloway** taken by people who live in other parts of the UK and more visits to forests in **Lochaber** taken by overseas visitors.

FIGURE 5 – VISITOR PROFILE – PLACE OF RESIDENCE (%)
FOREST DISTRICTS RANKED FROM HIGHEST PROPORTION OF SCOTTISH VISITORS TO LOWEST



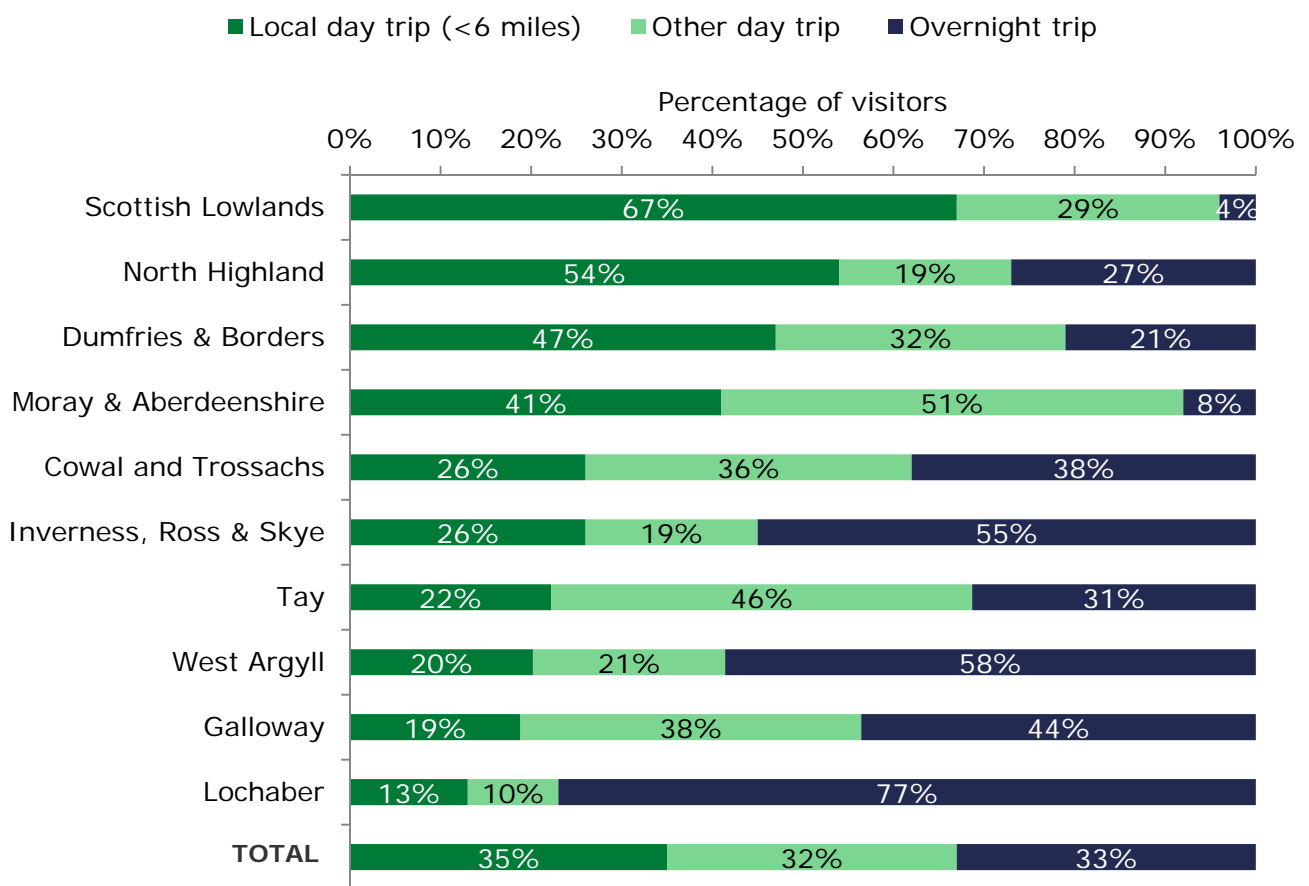
4.6 Type of trip

Overall a third (33%) of visitors visit while they are on an overnight trip (i.e. a holiday or short break), 35% are on a day trip but have travelled less than 6 miles to reach the forest and 32% are on a day trip from further afield.

By comparison, in the 2004 - 2007 AFS1 18% of visitors were on an overnight trip, 49% were on a local day trip and 33% were on a day trip from further afield.

The type of trip varies by forest district – larger proportions of visitors are on overnight trips in **Lochaber**, **West Argyll** and **Inverness, Ross and Skye** while most visitors in the **Scottish Lowlands** and **North Highland** districts are on local day trips.

FIGURE 6 – VISITOR PROFILE – TYPE OF TRIP (%)
FOREST DISTRICTS RANKED FROM HIGHEST PROPORTION OF LOCAL DAY VISITORS TO LOWEST



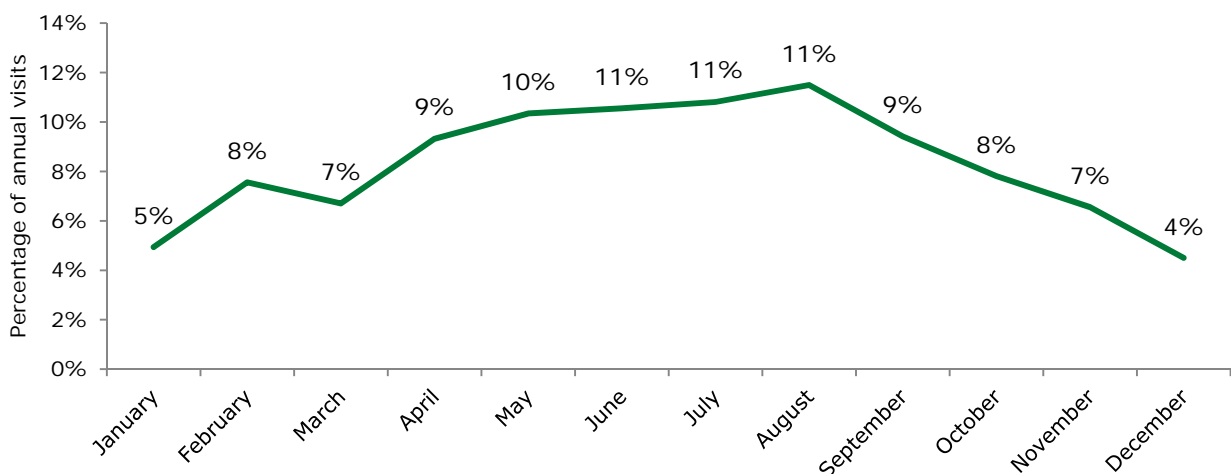
5. Visit characteristics

This section contains key survey results regarding the details of visits taken to Scotland's National Forest Estate including when they are taken, how long visits last, activities undertaken and money spent.

5.1 Seasonal variations in visit numbers

Figure 7 illustrates the monthly distribution of visits². The highest proportions of visits are taken in June, July and August while significantly fewer visits are taken in the winter months, particularly January and December.

FIGURE 7 – MONTHLY DISTRIBUTION OF VISITS –FORESTS WITH AUTOMATIC COUNTERS (%)



The seasonal distribution of visits is not consistent across forest districts (Table 6a) with less seasonal variation in **Dumfries & Borders**, **Moray & Aberdeenshire** and the **Scottish Lowlands** while the greatest seasonal variations are recorded in **Lochaber** and **North Highland**.

By comparison, as shown in Table 6b, the national surveys of outdoor recreation and tourism in Scotland show a similar seasonal variation in tourism visits while there is generally less variation in outdoor recreation trips taken by Scots residents.

² Based on counts from vehicle and trail counters during November 2012 to October 2013 period.

TABLE 6a – QUARTERLY DISTRIBUTION OF VISITS BY FOREST DISTRICT (%)

	Jan - Mar	Apr- Jun	Jul - Sep	Oct – Dec
TOTAL	19%	30%	32%	19%
Cowal & Trossachs	17%	34%	35%	14%
Dumfries & Borders	21%	28%	26%	25%
Galloway	17%	31%	33%	19%
Inverness, Ross & Skye	17%	28%	38%	18%
Lochaber	15%	28%	43%	14%
Moray & Aberdeenshire	20%	31%	29%	20%
North Highland	13%	30%	40%	17%
Scottish Lowlands	20%	31%	31%	18%
Tay	18%	29%	33%	20%
West Argyll	18%	32%	32%	18%

TABLE 6b – QUARTERLY DISTRIBUTION OF OUTDOOR RECREATION AND TOURISM

	Jan - Mar	Apr- Jun	Jul - Sep	Oct – Dec
Outdoor recreation by residents of Scotland*	23%	24%	26%	25%
Domestic holiday trips**	13%	28%	34%	25%
Overseas holiday trips**	10%	31%	46%	13%

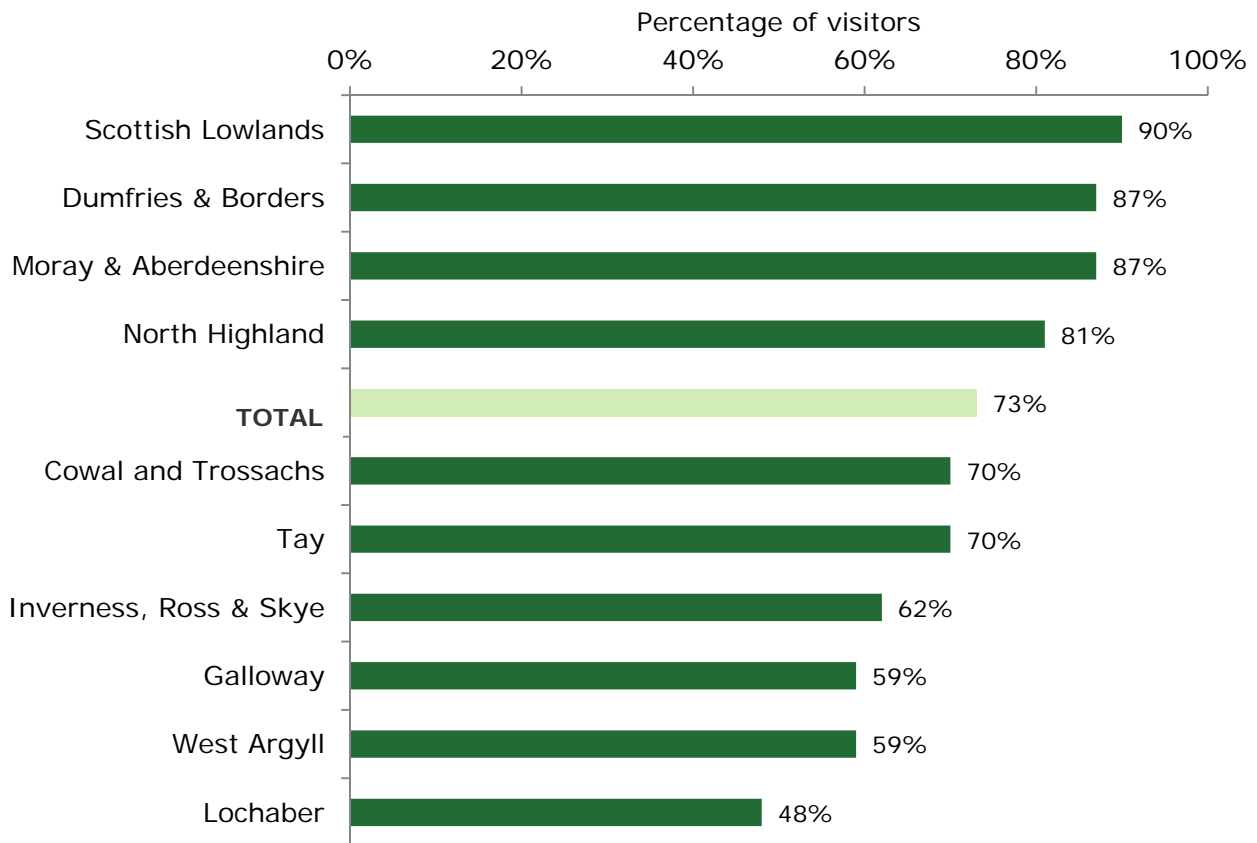
*Source: Scottish Recreation Survey 2012, SNH – includes all same day visits to outdoor places involving participation in informal recreation such as walking, cycling.

**Source: VisitScotland Key Facts 2012 – includes all visits taken for leisure purposes and involving at least once night away from home in Scotland.

5.2 Frequency of visits

Overall, around three-quarters (73%) of visitors had been to the forest they were interviewed at before. By comparison, in the 2004 - 2007 AFS1 84% of visitors were on a repeat visit.

FIGURE 8 – REPEAT VISITS BY DISTRICT (%)
FOREST DISTRICTS RANKED FROM HIGHEST PROPORTION OF REPEAT VISITORS TO LOWEST



As shown in Figure 8, proportions of repeat visitors were highest in the **Scottish Lowlands**, **Moray & Aberdeenshire** and **Dumfries & Borders** while **Lochaber** was the only forest district where more than half of visitors had not been to the forest before.

As shown in Table 7, almost a fifth of repeat visitors (18%) visited the forest on a daily basis while a further 30% visiting at least once a week. Frequency of visits was highest in the **Scottish Lowlands** and **North Highland**.

TABLE 7 – FREQUENCY OF VISITS TO FOREST AMONGST REPEAT VISITORS (%)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Daily (NET)	14	16	17	16	14	12	28	33	14	8	18
- More than once a day	6	3	3	5	-	2	12	10	3	2	5
- Once a day	8	13	14	11	14	10	16	23	11	6	13
1-3 times a week	26	37	24	24	18	31	40	35	29	26	30
1-3 times a month	20	24	21	15	16	25	13	14	21	30	20
1-3 times a year	28	20	28	33	24	24	13	13	29	20	24
Less often	13	3	10	12	28	8	6	4	8	17	9

5.3 Activities undertaken on visits

Over two-fifths of visitors took part in dog walking during their visit (43%) while 29% took part in other walking, without a dog. Around 8% of visits included cycling or mountainbiking – 6% on waymarked trails, 2% not on waymarked trails. Other activities included just passing through (5%), seeing something in the woodland such as wildlife or sculpture (4%) and picnics (3%).

By comparison, in the 2004 - 2007 AFS1 survey, a larger proportion of visitors took part in dog walking (50%) and cycling or mountain biking (11%) while fewer were 'just passing through' (1%) or having a picnic (1%).

FIGURE 9 – ACTIVITIES UNDERTAKEN DURING VISITS (%)

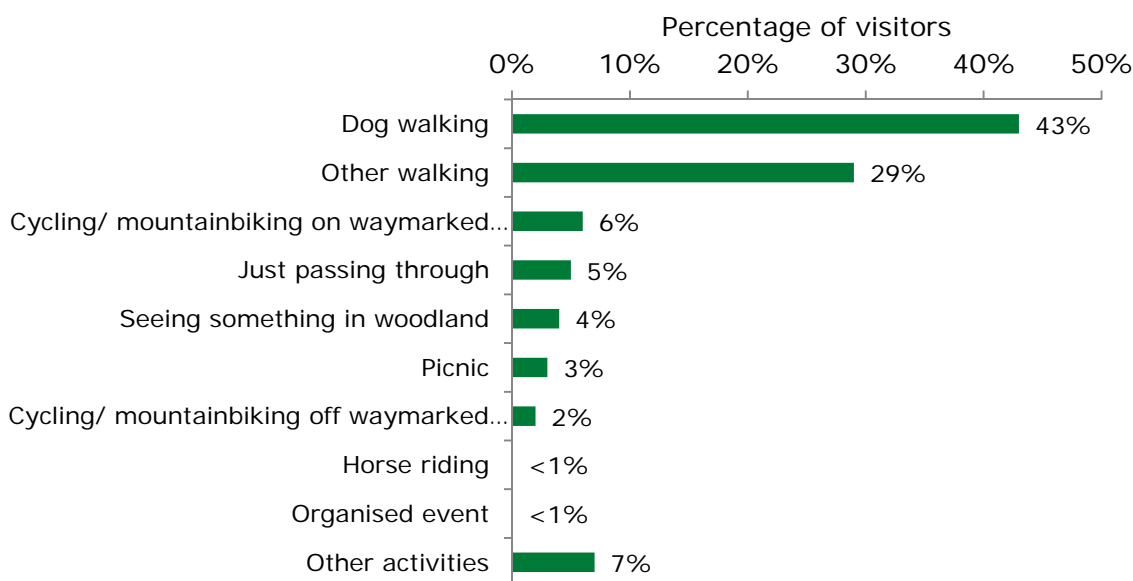


Table 8 illustrates variations in the activities undertaken by forest district. Key variations include:

- *Dog walking* - over half of visitors take part in dog walking in the **Scottish Lowlands** (56%) and **North Highland** (61%) forest districts.
- *Walking with no dog* – visitors to forests in **Cowal & Trossachs** are more likely than visitors to forests in other districts to take part in walking with no dog (46%).
- *Cycling and mountain biking* - visitors to forests in **Dumfries & Borders** are much more likely than visitors to forests in other districts to take part in cycling or mountain biking either on or off waymarked trails (33%).
- *Picnics* – visitors to forests in **Lochaber** are more likely to have picnics (13%).
- *Just passing through* – visitors to forests in **Lochaber** are more likely to state that they are 'just passing through' (14%).
- *Seeing something in the forest* - visitors to forests in **Lochaber** are more likely to state they saw something in the forest such as wildlife or sculpture (10%).

TABLE 8 – ACTIVITIES UNDERTAKEN ON VISITS BY FOREST DISTRICT (%)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Dog walking	33	49	44	35	23	50	61	56	44	35	43
Other walking	46	13	26	35	22	31	14	21	35	33	29
Cycling/ mountain biking	1	33	8	8	6	8	1	9	4	5	8
- on waymarked trails	1	25	7	6	6	4	1	6	4	5	6
- off waymarked trails	-	8	1	2	-	4	-	3	<1	-	2
Picnic	6	1	2	3	13	3	1	1	2	5	3
Just passing through	1	4	11	4	14	1	2	5	5	8	5
Seeing something in woodland	4	-	6	9	10	-	8	1	1	8	4
Horse riding	-	-	-	<1	-	<1	-	1	-	-	<1
Organised event	-	-	-	-	-	-	-	1	1	-	<1
Other	9	-	4	6	12	7	12	6	6	5	7

The 2012 Scottish Recreation Survey recorded a similar range of activities undertaken during outdoor visits by people living in Scotland as follows:

- *Walking* – main activity in 73% of all outdoor recreation visits and 79% of visits to woodland – compared to 72% of visits to Scotland's National Forest Estate as recorded by AFS2.
- *Cycling and mountain biking* – main activity in 4% of all outdoor recreation visits and 6% of visits to woodland – compared to 8% of visits to Scotland's National Forest Estate as recorded by AFS2.
- *Picnics* – main activity in 1% of all outdoor recreation visits – compared to 5% of visits to Scotland's National Forest Estate as recorded by AFS2.

5.4 Length of time spent on visits to Scotland's National Forest Estate

While over a third of visits lasted less than an hour (35%), a similar proportion lasted between 1 and 2 hours (36%) and the remaining 29% involved more than 2 hours spent in the forest. The average visit duration was 89 minutes.

By comparison, in the 2004 - 2007 AFS1 survey, a slightly shorter average visit duration was recorded (83 minutes) and a larger proportion of visits lasted less than an hour (59%).

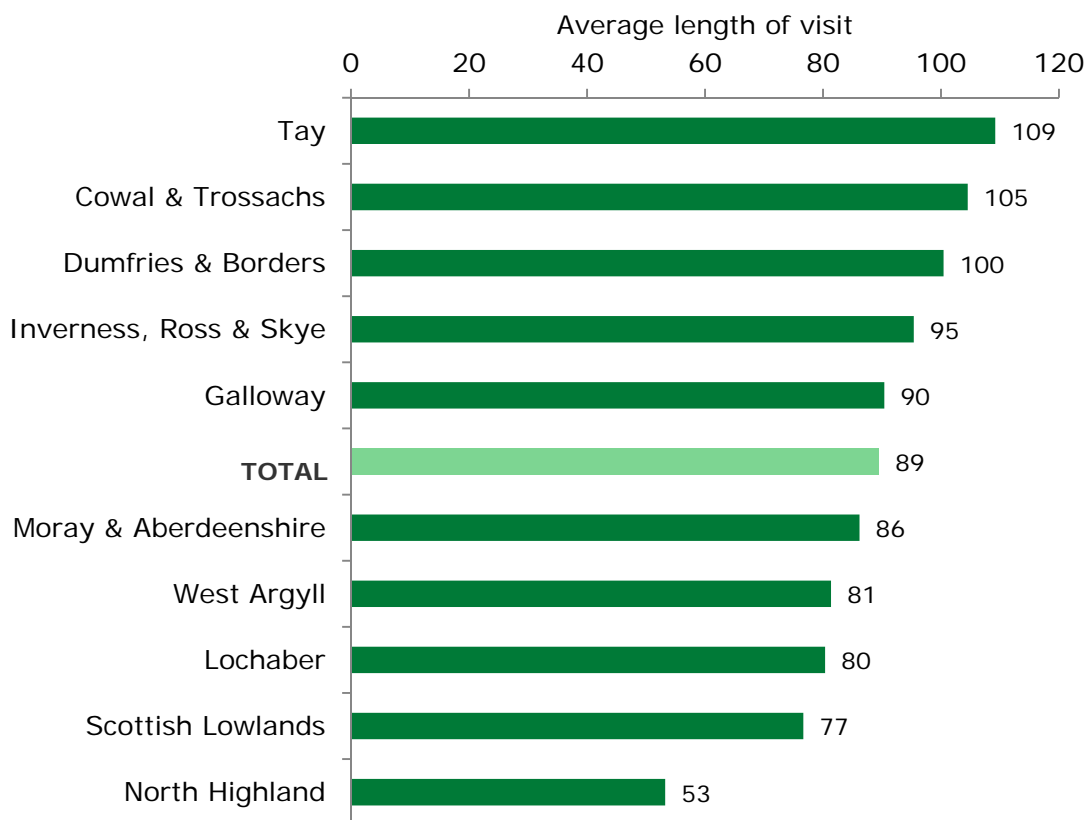
Comparing visit durations by forest district (Table 9), larger proportions of visits lasted less than an hour in **North Highland** (54%) while more visits lasted 3 or more hours in **Dumfries & Borders** (23%) and **Tay** (22%).

TABLE 9 – LENGTH OF VISITS BY FOREST DISTRICT (%)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
<30 mins	5	7	2	16	14	5	14	17	8	11	10
30-59 mins	19	25	34	25	29	21	40	24	24	27	25
1 hr – 1 hr 59 mins	39	31	34	31	27	43	39	40	35	35	36
2 hrs – 2 hrs 59 min	24	13	15	12	19	20	6	14	14	18	16
3 hrs – 4 hrs 59 min	6	22	12	13	9	8	-	4	19	8	10
5+ hours	7	1	4	5	2	2	-	2	3	1	3

Figure 10 compares the average length of visit in each of the ten forest districts. The average duration was lowest in **North Highland** (53 minutes) and the **Scottish Lowlands** (77 minutes) and highest in **Dumfries and Borders** (100 minutes), **Cowal & Trossachs** (105 minutes) and **Tay** (109 minutes).

FIGURE 10 – AVERAGE LENGTH OF VISITS BY FOREST DISTRICT (MINUTES)
FOREST DISTRICTS RANKED FROM LONGEST AVERAGE VISIT LENGTH TO SHORTEST



The 2012 Scottish Recreation Survey recorded the duration of outdoor recreation visits taken by Scottish adults to all types of natural place. Comparing the results illustrates that forest visits are more likely than other types of outdoor visits to be shorter in duration (27% of all outdoor recreation visits lasted less than an hour compared to 35% of forest visits).

5.5 Travel to forests

As shown in Table 10, over two-fifths of visitors travel less than 6 miles to reach the forest (43%) while a further 25% travel between 6 and 15 miles.

By comparison, in the 2004 - 2007 AFS1 survey, a larger proportion of visits taken involved a journey of less than 6 miles (58%).

While the majority of visitors to the **Scottish Lowlands** and **North Highland** districts travel less than 6 miles (69% and 60% respectively) visitors to **Lochaber**, **Tay** and **Dumfries & Borders** are the most likely to travel more than 50 miles.

TABLE 10 – DISTANCE TRAVELLED ON VISITS BY FOREST DISTRICT (%)

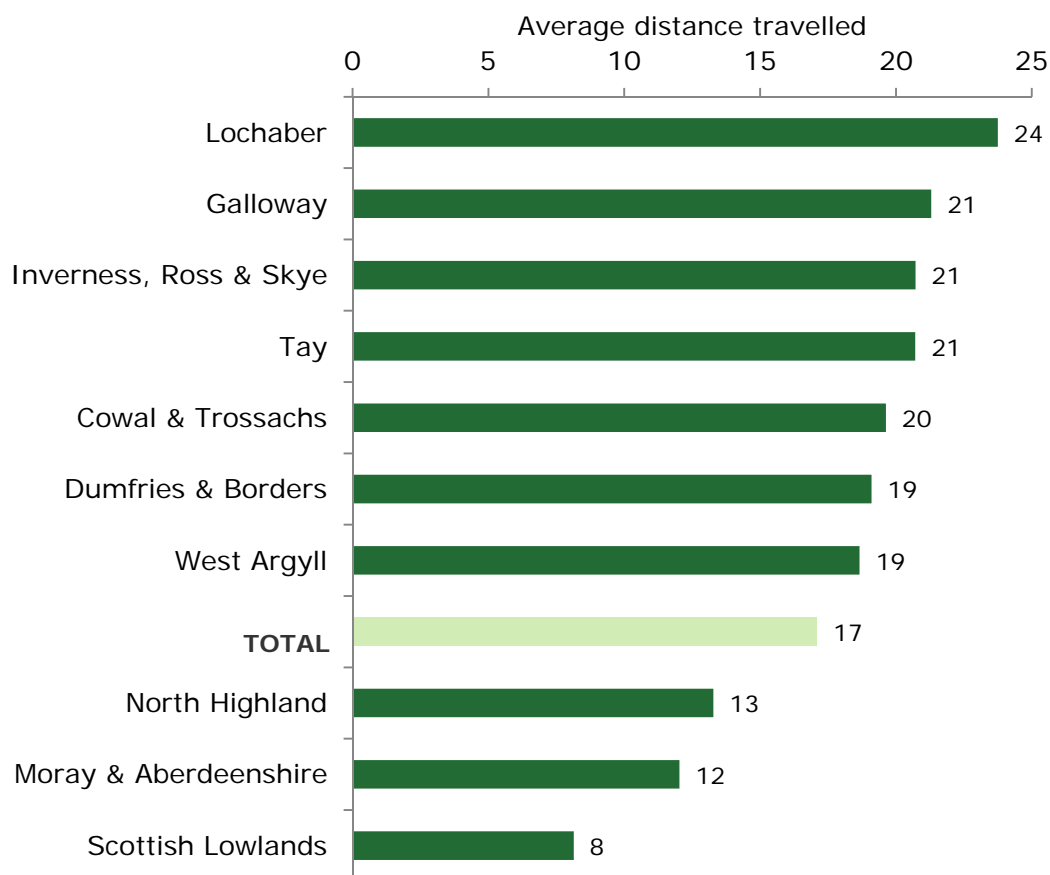
	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Less than 6 miles/ 10 km	37	54	26	36	33	43	60	69	32	38	43
6-15 miles/ 11-25 km	24	13	29	23	24	32	21	20	31	24	25
16-25 miles/ 26-40 km	10	5	17	12	13	17	6	5	11	16	12
26-50 miles/ 41-80 km	19	13	19	17	11	5	4	3	12	8	11
>50 miles/ 80 km	10	14	10	12	19	3	10	2	14	12	9

By applying the following values to the responses provided, it is possible to produce estimates for the average distances travelled to forests:

- Less than 6 miles = 3 miles
- 6 to 15 miles = 10.5 miles
- 16 to 25 miles = 20.5 miles
- 26 to 50 miles = 38 miles
- Over 50 miles = 70 miles

The average distance travelled across Scotland's National Forest Estate is 17 miles. The shortest average was estimated for the **Scottish Lowlands** (8 miles) while the longest average distance was recorded in **Lochaber** (24 miles).

FIGURE 11 – AVERAGE DISTANCE TRAVELLED ON VISITS BY FOREST DISTRICT (MILES)
FOREST DISTRICTS RANKED FROM LONGEST AVERAGE DISTANCE TRAVELLED TO SHORTEST



The 2012 Scottish Recreation Survey recorded total distances travelled, to and from destinations on outdoor recreation visits taken by Scottish adults. This survey found that there was an average *round distance* of 9 miles travelled, so an estimated 4.5 miles from home to the destination. This is a notably shorter distance than that recorded for visits to forests.

The majority of visits to Scotland's National Forest Estate are taken by car (85%) and around 1 in 10 are taken on foot (11%). Other modes of transport are used in much smaller proportions of visits and include cycling (2%), minibus/coach (1%) and public transport (less than 1%).

Notable variations between forest districts include higher proportions of visits to the **Scottish Lowlands** being taken on foot (44%) while the highest proportions of visits taken by car were recorded in **Galloway** and **Moray & Aberdeenshire** (both 95%).

TABLE 11 – TRANSPORT USED ON VISITS BY FOREST DISTRICT (%)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Car/ van	83	88	95	83	91	95	93	49	92	85	85
On foot	15	7	4	2	2	4	5	44	5	10	11
Bicycle	-	3	-	4	3	1	-	4	1	1	2
Minibus/ coach	1	1	1	<1	1	<1	-	1	1	-	1
Public transport	-	-	-	1	-	<1	-	2	-	1	<1
Other	1	1	-	3	3	<1	2	1	-	3	1

By comparison, the 2004 - 2007 AFS1 survey recorded a lower proportion of visits taken by car (78%) while more were taken on foot (18%).

The 2012 Scottish Recreation Survey recorded the modes of transport used on outdoor recreation visits taken by Scottish adults. This survey found that 64% of all outdoor recreation visits were taken on foot while 30% were taken by car, 3% were taken by bicycle and 2% by public transport. 54% of the visits recorded by this survey, which were taken to woodland, were taken on foot and 38% were taken by car.

5.6 Expenditure

All visitors were asked to specify how much money they had or would personally spend on a number of items on the day of their visit and, if they were on an overnight trip, how much they had spent on their accommodation the previous night.

Overall, across Scotland's National Forest Estate, 77% of visitors had spent money during their visits while 23% did not spend any money (Table 12). The largest proportions had spent money on transport, including fuel (71%) and/or food and drink (36%).

Visitors to **Lochaber** and **North Highland** were the most likely to have spent any money on the day of their visits. In **Lochaber** visitors were likely to have purchased a range of different items and 62% had spent money on overnight accommodation.

In contrast, only around a third of visitors to the **Scottish Lowlands** had spent any money (37%), very few purchased accommodation (1%) or spent any money on admission fees (2%) or shopping (2%).

TABLE 12 – ITEMS PURCHASED ON DAY OF VISIT (%)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Spent something	72	79	87	87	92	79	93	37	77	81	77
Transport	64	73	86	77	88	73	88	33	70	76	71
Food & drink	37	37	54	52	59	18	24	11	36	46	36
Accommodation	29	18	34	45	62	4	20	1	22	46	25
Admission fees	5	30	23	8	14	5	6	2	8	7	10
Shopping (non-routine)	10	5	8	16	20	3	7	2	8	14	9
Other	4	4	6	2	8	1	1	1	3	5	3
Equipment	2	4	2	2	1	-	-	1	2	1	1
Spent nothing	28	21	13	13	8	21	7	63	23	19	23

As shown in Figure 12 overleaf, average spend per visit was £35 when including expenditure on overnight accommodation or £18 excluding accommodation.

Average spend varies between forest districts with the highest average amounts spent by visitors to **Lochaber** (£81 including accommodation) and **Inverness, Ross & Skye** (£61) while significantly less was spent by visitors to the **Scottish Lowlands** (£3).

Table 13 provides further details on average spend on different items, illustrating the higher average spend on transport, shopping and accommodation by visitors to **Lochaber** while, on average, visitors to the **Scottish Lowlands** spent much less on all of the items asked about.

**FIGURE 12 – AVERAGE EXPENDITURE ON DAY OF VISIT INCLUDING AND EXCLUDING ACCOMMODATION SPEND (BASED ON ALL RESPONDENTS I.E. INCLUDING THOSE WHO SPENT NOTHING)
FOREST DISTRICTS RANKED FROM HIGHEST AVERAGE SPEND INCLUDING ACCOMMODATION TO LOWEST**

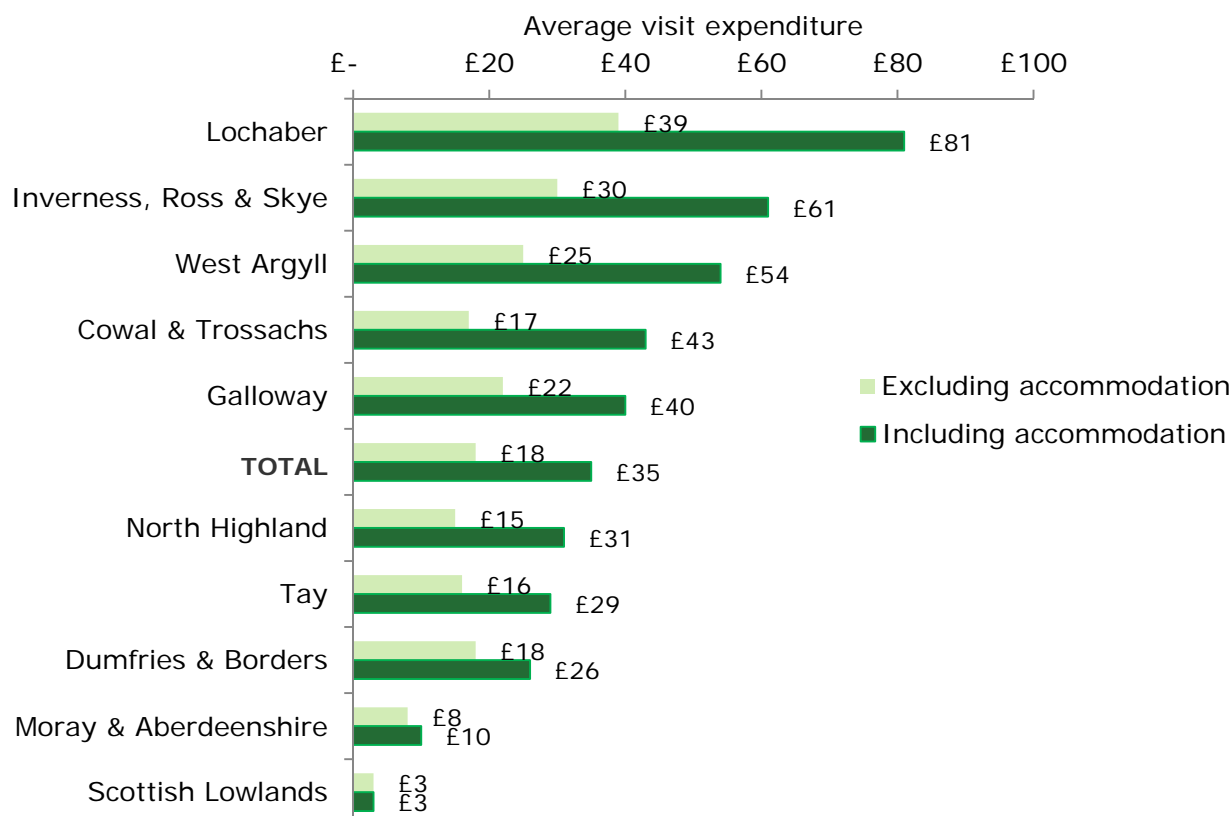
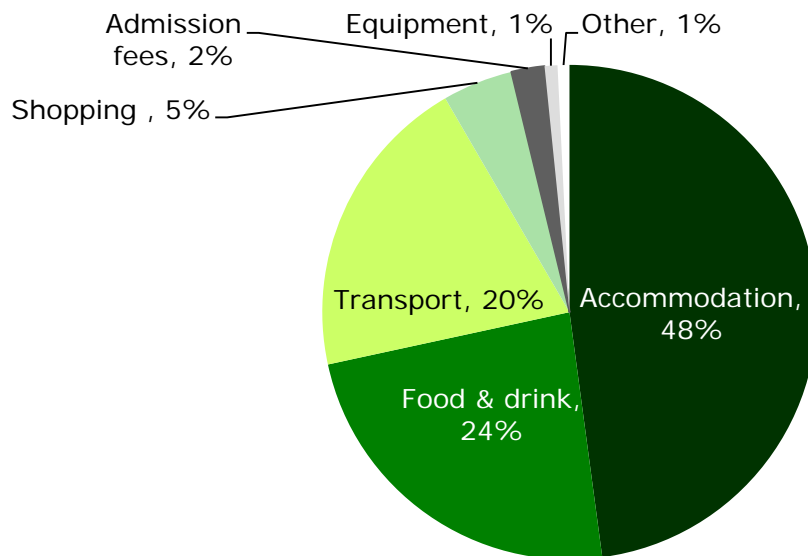


TABLE 13 – AVERAGE EXPENDITURE ON DAY OF VISIT BY CATEGORY AND FOREST DISTRICT (£, BASED ON ALL RESPONDENTS I.E. INCLUDING THOSE WHO SPENT NOTHING)

	C&T	D&B	GAL	IRS	LOC	M&A	NH	SL	TAY	WA	Total
Food & drink	6.91	6.13	12.03	14.80	15.99	3.36	6.99	0.99	7.14	12.41	8.21
Transport	8.02	8.98	8.73	8.63	13.45	3.83	6.34	1.87	7.06	7.38	6.93
Shopping (non-routine)	1.30	1.01	0.80	3.83	4.51	0.39	0.25	0.03	1.23	3.19	1.59
Admission fees	0.09	0.88	0.57	1.86	2.75	0.08	0.37	0.06	0.35	0.70	0.75
Equipment	0.82	0.76	0.14	0.36	0.48	0.03	-	0.03	0.29	0.33	0.29
Other	0.08	0.02	-	0.27	1.65	0.01	0.24	-	0.24	1.34	0.27
Total exc. accommodation	17.22	17.78	22.27	29.75	38.83	7.70	14.19	2.98	16.31	25.35	18.04
Accommodation	25.88	8.09	16.91	30.99	41.76	2.78	16.83	0.15	12.54	29.08	16.58
Total inc. accommodation	43.10	25.87	39.18	60.74	80.59	10.48	31.02	3.13	28.85	54.43	34.62

As shown in Figure 13 around half of all expenditure is spent on overnight accommodation (48%), while 24% is spent on food and drink and 20% is spent on transport (Figure 13).

FIGURE 13 – DISTRIBUTION OF EXPENDITURE BY VISITORS



Total average spend £35

The 2012 Scottish Recreation Survey recorded expenditure across all outdoor recreation visits taken by Scottish adults.

This survey found that money was spent on just 30% of all outdoor recreation visits, a significantly lower proportion than recorded by AFS2 for visits (77%). The average amount spent on outdoor recreation visits, excluding accommodation, was £9, around half the amount recorded by AFS2 for visits (£18).

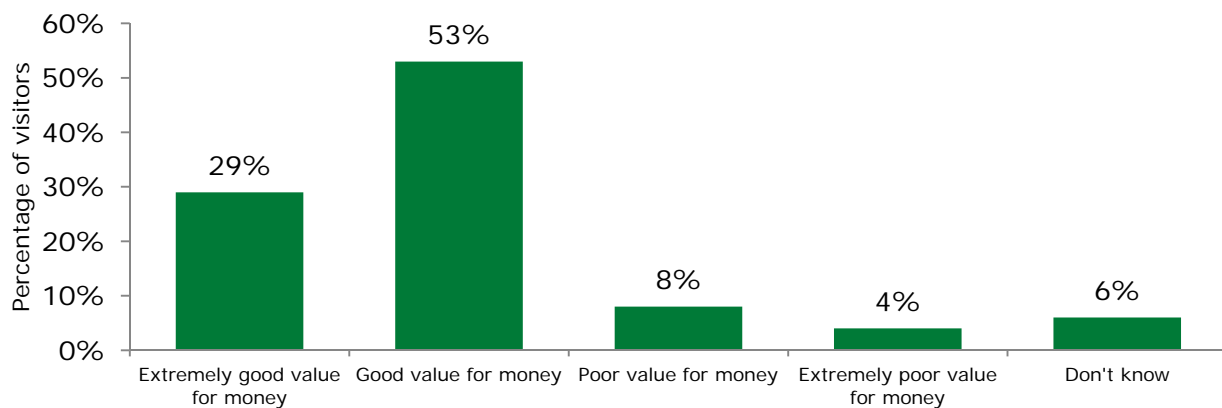
5.7 Car parking charges

During interviewing shifts undertaken at FCS car parks where there are charges, visitors were asked to comment on the value for money of these charges. Figure 14 illustrates the range of responses obtained at these locations, excluding visitors who stated that they were unaware of charges.

Most visitors (82%) think that parking charges are 'good' or 'extremely good' value for money. Visitors who are on a holiday or short break are the most likely to provide these positive responses (88%).

However 12% of visitors think that parking charges are 'poor' or 'extremely poor' value for money. Local day trippers and repeat visitors are the most likely to provide these negative responses (17% and 15% respectively).

FIGURE 14 – PERCEPTIONS OF PARKING VALUE FOR MONEY – FORESTS WITH PARKING CHARGES WHERE RESPONDENT IS AWARE OF CHARGES (%)



5.8 Visiting Scotland's National Forest Estate while on holiday in Scotland

A third of visitors are on a holiday or short break (33%). As shown in Table 14, the average length of holiday amongst these visitors is 9 nights with most of this time (8 nights) spent in Scotland.

By comparison, in the 2004 - 2007 AFS1 survey, a lower proportion of visitors were on a holiday or short break (18%) but the average length of stay was the same.

The proportion of visitors on a holiday or short break varies somewhat between forest districts, representing around three-quarters of visitors in **Lochaber**, over half in **West Argyll** and **Inverness, Ross & Skye** but much lower proportions in **Moray & Aberdeenshire** (8%) and the **Scottish Lowlands** (4%).

TABLE 14 – PROPORTION OF VISITORS WHO ARE ON HOLIDAY AND LENGTH OF STAY

	Proportion of visitors on a holiday or short break	Average length of holiday/ short break - total (Nights)	Average length of holiday/ short break – in Scotland (Nights)
Lochaber	77%	13	10
West Argyll	58%	11	9
Inverness, Ross & Skye	55%	10	9
Galloway	44%	6	6
Cowal & Trossachs	38%	8*	7*
Tay	31%	8	8
North Highland	27%	11*	10*
Dumfries & Borders	21%	7	5
Moray & Aberdeenshire	8%	6*	6*
Scottish Lowlands	4%	13*	11*
TOTAL	33%	9	8

*Note sample of overnight visitors is less than 50 so results should be used with caution

Visitors who were on a holiday or short break were most likely to stay overnight in self-catering accommodation (28%) or to camp or stay in a caravan or cabin (23%).

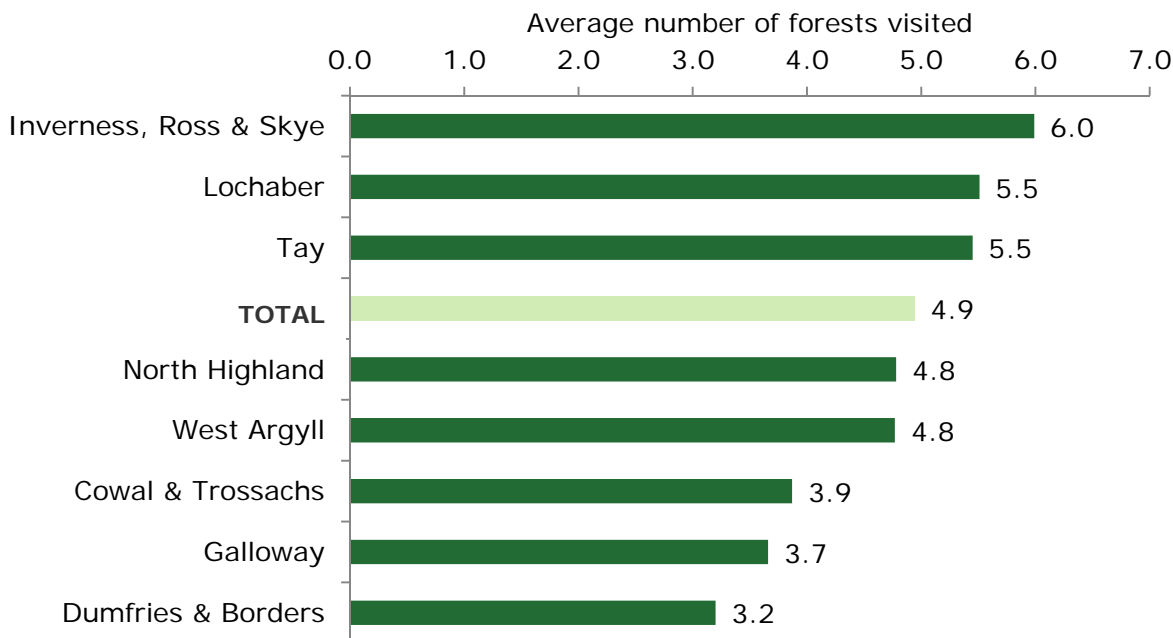
TABLE 14 – ACCOMMODATION TYPES USED BY THOSE STAYING AWAY FROM HOME (%)

	D&B	GAL	IRS	LOC	TAY	WA	Other districts*	Total
Self-catering	13	34	32	26	25	25	24	28
Tent/ caravan/ cabin	30	34	20	21	21	23	22	23
GH/ B&B	13	10	15	15	13	23	10	14
Hotel	23	7	13	16	8	11	18	14
Friends/ relatives	10	5	10	10	18	6	14	10
Hostel/ outdoor centre	-	-	6	7	7	-	2	4
Other	10	9	6	4	7	13	10	7

*Combined results for forest districts with a sample of under 50 overnight visitors each i.e Cowal & Trossachs, Moray & Aberdeenshire, North Highland, Scottish Lowlands

Visitors on overnight trips were also asked to state the total number of visits they had taken to forests during their holiday or short break (including their current forest visit). On average, visits had been made to 5 forests with the greatest frequency of forest visits recorded amongst visitors to forests in the **Inverness, Ross and Skye, Lochaber** and **Tay** forest districts.

**FIGURE 15 – AVERAGE NUMBER OF FORESTS VISITED WHILE STAYING AWAY FROM HOME
FOREST DISTRICTS HIGHEST AVERAGE NUMBER OF FORESTS VISITED TO LOWEST**



It is useful to consider the above results in the context of wider tourism surveys undertaken by VisitScotland including the 2011 – 2012 Scotland Visitor Survey. This survey showed that:

- Scenery and landscape is the top reason for choosing to visit Scotland. Reflecting the above geographical variations in frequency of visits to forests by tourists, scenery is of most importance to visitors in the Highlands.
- Walking and sightseeing are amongst the most frequently undertaken activities during holidays and short breaks in Scotland, in particular in the Highlands, Loch Lomond & The Trossachs and Dumfries & Galloway.
- Comparing the AFS2 results with those from the Scotland Visitor Survey shows that visitors to Scotland's National Forest Estate are much more likely than the average tourist in Scotland to stay overnight in a tent or caravan (23% compared to 9%) but they are less likely to stay in a hotel (14% compared to 41%).
- At 9 nights, average length of holiday amongst visitors to Scotland's National Forest Estate is the same as the average recorded for all tourists in the Scotland Visitor Survey.

6. Appendix

6.1 Appendix 1 – Annual visit estimates by forest

The tables below provide annual estimates of visits to Scotland's National Forest Estate by forest district. Visit estimates for those forests not included in the survey fieldwork (***shown in bold italics***) have been produced using the methods summarised in Section 2. Estimates are also provided for the number of visits taken by Long Distance Route users, based on data provided by FCS forest district staff and Long Distance Route managers.

Cowal & Trossachs

Achray	174,201
Glen Croe	74,818
Katrine	58,251
East Loch Lomond	56,175
<i>Balmaha</i>	<i>54,177</i>
<i>Arrochar</i>	<i>45,747</i>
Cruach Benmore	41,537
Callander Crag	41,000
South Loch Ard	37,283
Ardgartan Peninsula	33,560
<i>Garadhban</i>	<i>23,948</i>
<i>Aberfoyle</i>	<i>23,948</i>
Strathyre East	12,714
<i>Ben Ledi</i>	<i>11,700</i>
Glen Finart	11,407
Corlarich (Kilbride CP)	9,693
<i>Lochgoilhead</i>	<i>8,000</i>
<i>Corlarach (Ardyne)</i>	<i>5,000</i>
Glenbranter	4,744
<i>Old Drymen Road</i>	<i>1,000</i>
<i>Braeval</i>	<i>1,000</i>
<i>Long Distance Routes</i>	<i>71,500</i>
<i>Events</i>	<i>500</i>
<i>COWAL AND TROSSACHS TOTAL</i>	<i>801,904</i>

Dumfries & Borders

Glentress	306,384
Mabie and the hills	71,568
Dalbeattie	51,516
Yair	44,784
Heathhall	40,666
Newcastleton	32,983
Kirkland	32,709
Traquair	29,365
Thornielee	20,364
Cardrona	18,698
Mark Hill	14,000
Screel	13,208
Caberston	10,200
Cademuir	10,193
Craigieburn	7,500
Auchencastle	1,000
Brownmoor	1,000
Cairnhead	1,000
Castle o'er	1,000
Doach	1,000
Gamescleuch	1,000
Greskine	1,000
OldForest	1,000
Southwick Station	1,000
Wauchope	1,000
Craik	800
Auchenrodden	500
Blacklaw	500
Buittle Hill	500
Burnfoot	500
Cloich	500
Craigielands	500
Criffel	500
Earshaigs	500
Elibank	500
Eshiels	500
Eskdale Complex	500
Garrowgill	500
Hyndlee	500
Ironhirst	500
Kinharvie Complex	500
Ladyurd	500
Lethem	500

<i>Lochar Mosses</i>	500
<i>Lockerbie House</i>	500
<i>Longbedholm</i>	500
<i>Shankend</i>	500
<i>Gledenholm</i>	250
<i>Long Distance Routes</i>	7,500
DUMFRIES & BORDERS TOTAL	733,188

Galloway

Clatteringshaws	210,233
Kirroughtree	107,868
Glentrool	46,714
Carrick	38,098
Barrhill	34,935
Queensway	28,842
Bowers Wood & Clarks Wood	28,646
Penninghame	28,000
Glenashdale (ARRAN)	25,000
Laurieston	23,870
Fleet oak woods	20,044
Bellsbank	20,000
Loch Trool	16,952
Fleet Basin	15,322
Creetown	15,000
Three loch & marshallloch	15,000
Torr Righ (ARRAN)	15,000
Sannox North (ARRAN)	15,000
Dyemill (ARRAN)	15,000
Kilsture	14,959
Torrs Warren	14,307
Stranraer	14,000
Glenwhan	12,235
Back Hill of Bush	12,197
Castlemaddy	12,197
Tairlaw	12,197
Glenrickard (ARRAN)	10,000
Merkland (ARRAN)	10,000
Changue	7,000
Barr	6,003
Brigton	6,000
Minniwick	6,000
Corwar mains	6,000
Garbad	5,000
Lamachan	5,000
Knock of Luce Group	5,000

<i>Corriedoo</i>	2,000
<i>Pencloe</i>	1,000
<i>Bartaggart</i>	1,000
<i>Round Fell</i>	1,000
<i>Kilpatrick</i>	1,000
<i>Rowantree</i>	1,000
<i>Girvan Road</i>	1,000
<i>Kigallioch</i>	1,000
<i>Glen Loig</i>	1,000
<i>Glencaird Hill</i>	1,000
<i>Kyle South</i>	1,000
<i>Kyle North</i>	1,000
<i>Moss of Cree</i>	1,000
<i>Machrie</i>	1,000
<i>Galalane</i>	1,000
<i>Tannilaggie</i>	1,000
<i>Drumjohn</i>	1,000
<i>Dougdrull</i>	1,000
<i>Auld craigoch</i>	1,000
<i>Glenborrodale (ARRAN)</i>	1,000
<i>Long Distance Routes</i>	7,500
GALLOWAY TOTAL	906,120

Inverness, Ross and Skye

Glenmore	413,592
Upper Beaully	113,439
Raasay	94,891
Inchnacardoch	81,335
Culloden	71,883
Strathmashie	63,307
Slattadale	57,234
Glenbrittle	54,223
Glenurquhart	54,223
Learnie	54,223
Daviot	54,223
Culbokie	40,667
Reelig	40,621
Craig Phadrig	38,441
Inshriach	35,380
Stromewood	27,112
Clashwood	27,112
Alltsigh	27,112
South Loch Ness	19,165
Kinloch Hills	18,430
Black Isle Main Block	17,701

Broadford	14,097
Ord Hill	13,556
Achnashellach	1,000
Glensheil	1,000
Moyle	1,000
Arnisdale	1,000
South Strome	1,000
Kerrow	1,000
Craig Nay	1,000
Boblainy	1,000
Battan	1,000
Aigas	1,000
Birchwood	1,000
Auchmore	1,000
Rheindown	1,000
Drumderfit	1,000
Gallowhill	1,000
Allanglach	1,000
Woodside	1,000
Farr & Inverarnie	1,000
Moy	1,000
Glenkirk	1,000
Meallmore	1,000
Laiken	1,000
Ferness	1,000
Assich	1,000
Invermoriston	1,000
Knockie	1,000
Long Distance Routes	37,000
INVERNESS, ROSS & SKYE TOTAL	1,494,966

Lochaber

Leanachan	83,972
Glen Nevis	55,516
Glen Righ	36,649
Clunes	34,758
Glencoe	33,767
Glengarry	27,717
Glen Finnan	25,000
Drynachen	23,356
Dark Mile	23,356
Garbh Eilean (Loch Sunart)	16,745
Ariundle	16,445
Craig Liath	15,571
Gairloch	15,571

<i>Callop</i>	15,571
<i>Salen</i>	15,571
<i>Phemies wood</i>	15,571
<i>Brecklet</i>	15,571
<i>Glenachulish</i>	15,571
<i>Glen Loy</i>	15,571
<i>Duror</i>	15,571
<i>South Laggen</i>	7,785
<i>North Loch Arkaig</i>	2,000
Aoindh Mor	1,095
<i>Ardochy</i>	1,000
<i>South Loch Arkaig</i>	1,000
<i>Mucomir</i>	1,000
<i>Camisky</i>	1,000
<i>Inveroy</i>	1,000
<i>Drumfern</i>	1,000
<i>Loch Sheil</i>	1,000
<i>Glenhurich</i>	1,000
<i>Carnoch</i>	1,000
<i>Camustorsa</i>	1,000
<i>Ardmorlich</i>	1,000
<i>Camusachoirk</i>	1,000
<i>Clach na criche</i>	1,000
<i>Salachen</i>	1,000
<i>Long Distance Routes</i>	98,000
<i>Events</i>	30,000
LOCHABER TOTAL	670,301

Moray & Aberdeenshire

Aberdeen Woods	176,307
Bennachie	133,482
Roseisle	88,525
<i>Tyrebagger</i>	86,885
<i>Corsee Wood</i>	81,512
Culbin	65,084
Scotly (Banchory Woods)	54,343
<i>Delgaty</i>	54,341
<i>Inslismaldie</i>	54,341
<i>Denlethen</i>	54,341
<i>Upper Lochton</i>	54,341
<i>Warren</i>	54,341
Monaughty	40,915
<i>Blackhall</i>	40,000
<i>Gartly</i>	27,171
<i>Pitcaple</i>	27,171

<i>Aquythie</i>	27,171
<i>Leschangie</i>	27,171
<i>Capo</i>	27,171
<i>Newmillhill</i>	27,171
<i>Parkhill</i>	27,171
<i>Cambus O May</i>	27,171
<i>Newtyle</i>	27,171
<i>Lossie</i>	27,171
<i>Ben Aigan</i>	27,171
<i>Ordiequish</i>	27,171
Deer Park & Whiteash	27,127
Kirkhill (Dyce Woods)	25,510
The Bin	22,069
Quarrelwood	20,231
<i>Fetteresso</i>	15,000
<i>Craigiedaff</i>	15,000
<i>Mosstodloch</i>	15,000
<i>Dunnyduff</i>	12,000
<i>Main Block</i>	10,000
<i>Main Block</i>	10,000
<i>Main Block</i>	10,000
<i>North Drumtochty</i>	8,000
<i>Maryculter</i>	8,000
<i>Balnacoul</i>	8,000
<i>Balbithan</i>	7,000
<i>Whitehaugh & knockespock</i>	6,000
<i>West Corrennie</i>	6,000
<i>Blackstob Wood</i>	6,000
<i>Elchies</i>	6,000
<i>Slacks</i>	5,000
<i>Teindland</i>	5,000
<i>Dunbennan</i>	4,000
<i>Gight</i>	4,000
<i>Bunzeach</i>	4,000
<i>Clune</i>	4,000
<i>Clochandighter</i>	4,000
<i>Brownhill (Bin)</i>	3,000
<i>Sillyearn Wood</i>	3,000
<i>Harthills</i>	3,000
<i>Culriach</i>	3,000
<i>Brownhill</i>	2,000
<i>Kinnoir</i>	2,000
<i>Gallowshill</i>	2,000
<i>Scarewood</i>	2,000
<i>East Corrennie</i>	2,000
<i>Craiglug</i>	2,000

<i>Warren, Ashentilly Currackstane</i>	<i>2,000</i>
<i>Midmar</i>	<i>2,000</i>
<i>Hill of Brathens</i>	<i>2,000</i>
<i>Glencommon</i>	<i>2,000</i>
<i>Brathens Moss</i>	<i>2,000</i>
<i>East Brathens</i>	<i>2,000</i>
<i>Brathens Wood</i>	<i>2,000</i>
<i>Broomhill</i>	<i>2,000</i>
<i>Pannanich</i>	<i>2,000</i>
<i>Castlehill</i>	<i>2,000</i>
<i>Stynie</i>	<i>2,000</i>
<i>Morinsh</i>	<i>2,000</i>
<i>Smallburn</i>	<i>1,000</i>
<i>Aquorthies</i>	<i>1,000</i>
<i>Roquharrold</i>	<i>1,000</i>
<i>Cottown</i>	<i>1,000</i>
<i>Cairnton</i>	<i>1,000</i>
<i>South Drumtochty</i>	<i>1,000</i>
<i>Inver</i>	<i>1,000</i>
<i>Kilnhill</i>	<i>1,000</i>
<i>Wangie</i>	<i>1,000</i>
<i>Blackburn/Trochelhill</i>	<i>1,000</i>
<i>Whitehill</i>	<i>500</i>
<i>Balvack</i>	<i>500</i>
<i>Glacks</i>	<i>500</i>
<i>Kirkwood</i>	<i>500</i>
<i>Auchernoch</i>	<i>500</i>
<i>Woodlands</i>	<i>500</i>
<i>Mulloch</i>	<i>500</i>
<i>Garrol</i>	<i>500</i>
<i>Northbrae & Balbridie</i>	<i>500</i>
<i>Balladrum</i>	<i>500</i>
<i>Free Church</i>	<i>500</i>
<i>Kirkton Wood</i>	<i>500</i>
<i>Duffs Hill</i>	<i>500</i>
<i>Collonach</i>	<i>500</i>
<i>Leuchar Moss</i>	<i>500</i>
<i>Dam Wood</i>	<i>500</i>
<i>Kynoch Plantation</i>	<i>500</i>
<i>Larnach Wood</i>	<i>500</i>
<i>Corse</i>	<i>500</i>
<i>Millbuie</i>	<i>500</i>
<i>Auchenhalrig</i>	<i>500</i>
<i>Rosarie</i>	<i>500</i>
<i>Glenfiddich & Blackwater</i>	<i>500</i>
<i>Cairdswood</i>	<i>500</i>

Aultmore	500
Maud	500
Drum	-
Long Distance Routes	27,000
Events	37,000
MORAY & ABERDEENSHIRE TOTAL	1,766,744

North Highland

Torrachilty	47,804
Morangie	24,955
Borgie	20,430
Achairn	20,430
Fourpenny	20,430
Lael Forest Garden	20,430
Garve	20,430
Blackmuir/ Knockfarrel	20,430
Achany - Falls of shin	18,407
Camore	13,696
Invershin	12,185
Ferry Wood	10,215
Ordhill	10,215
Rossal	10,215
Rumster	10,215
Guns wood	10,215
Rosehall	10,215
Skelbo	10,215
Inverlael	10,215
Contin	10,215
Strathrory	10,215
Rogart	10,215
Achilty	10,215
Newtonhill Croft	7,665
Sibster	4,765
Dalchork Bird Hide	1,000
Toftgun	1,000
Halsary	1,000
Braehour	1,000
Braemore	1,000
Inveroykle	1,000
Achormlarie	1,000
Morrish More	1,000
Lamington	1,000
Inchindown	1,000
Stittenham	1,000
Damwood	1,000

Strathrusedale	1,000
Garbat	1,000
Corriemoilie	1,000
Lochluichart	1,000
Stroupster	1,000
Ardross	1,000
Benmore	1,000
NORTH HIGHLAND TOTAL	393,640

Scottish Lowlands

Callendar wood	169,342
Boden Boo	92,698
Larbert	73,467
Tulliallan	73,133
Blairadam	46,266
Carron Main Block	42,802
Lord Ancrums Wood, Newbattle	41,626
Nethercroy	38,570
Windyhill	36,706
Easterhouse - Cardowan	36,356
Cardenden	34,967
Kilpatrick Hills - Gavinburn	34,682
Gartmorn	26,620
Garscadden	25,289
Drumchapel Cleddans Burn	23,389
Pendreich	23,389
Wilsontown Ironworks	22,747
Devilla	19,498
Bothwell Park	15,630
Dean	15,593
Rawyards	14,921
Kilpatrick Hills - Cochno	14,786
Bluebell Wood	14,781
Benarty	13,200
Easterhouse - Auchenshuggle	11,786
Fauldhouse	11,696
West Maryston	10,277
Wester Moffat	9,026
Forestmill /School Wood	7,796
Howwood	7,796
Lennox	7,796
Howwood	6,929
Kilpatrick Hills - Auchentorlie	6,009
Easterhouse Bishops Loch LNR	5,544
Easterhouse - Todds Wells	3,340

Auchentorlie	3,036
Twechar	1,630
Barrhill	1,164
Arns	1,000
Auchlochan	1,000
Kilpatrick Hills - Aucheneden	1,000
Balgownie	1,000
Benhar/Falla Hill	1,000
Brackenhirst	1,000
Cadgerford	1,000
Camilty	1,000
Cullaloe	1,000
Carnock	1,000
Campsie Glen	1,000
Drumtassie	1,000
E & W Dunsyston	1,000
East Grange	1,000
Eastfield	1,000
Gateside wood	1,000
Garshellach	1,000
Heathland	1,000
Kingshill	1,000
Knockmountain	1,000
Lambhill	1,000
Limerigg	1,000
Limerigg Drumbow	1,000
Longriggend	1,000
Muirkirk	1,000
Kilpatrick Hills - Merkins	1,000
Mossband & Murdostoun	1,000
Muirhead Moss/Easter Muihead	1,000
Muirside	1,000
Nether Braco	1,000
Pitcairn	1,000
West Cairns	1,000
West Forth	1,000
Woodmuir	1,000
SCOTTISH LOWLANDS TOTAL	1.078,281

Tay

Tentsmuir	159,000
Allean (includes Queen's View)	150,000
Deuchny Wood	90,315
Faskally I & II	59,850
Ladybank	59,706
Craigvinean	35,009
Foss/Tombreck	30,000
Balkello	26,700
South Rannoch	26,000
Glen Doll	21,604
Westfield	20,000
Drummond Hill	18,400
Dalerb	17,574
Laggan	15,000
Weem/Glassie	10,402
Kindrogan	10,000
Pitmedden	5,000
Glen Isla	3,000
Grandtully	2,950
Barracks	1,000
Rannoch Lodge	1,000
Blackcraig	1,000
Dalrulzion	1,000
Kinballoch	1,000
Glen Prosen	1,000
Hallyburton	1,000
Dronley	1,000
Montreathmont	1,000
Glen Devon	1,000
Glen Sherrup	1,000
Keillour	1,000
5 mile wood	1,000
Taymount	1,000
Events	42,000
TAY TOTAL	816,510

West Argyll

Knapdale	45,392
West Lochaweside	27,990
Aros Park	26,969
Ardcastle	24,252
Kilmichael	22,392
North Mull	22,392
South Mull	22,392
Bardcaldine East	20,926
Garmony	18,134
Deer Hill	16,794
Glen Orchy	16,794
Fearnoch	13,201
Beinn Ghuillean	11,196
Corranbuie and Skipness	11,196
Ardmore	9,314
Succoth	6,988
Creran	5,598
Kilmory	5,598
Taynuilt	5,598
Glen Nant	4,852
Glen Orchy	2,426
Carradale	1,000
Cologin	1,000
Dalmally	1,000
Eredine	1,000
Loch Avich	1,000
Minard Castle	1,000
Ormaig and Salachry	1,000
Lussa	1,000
Long Distance Routes	48,000
Events	1,500
WEST ARGYLL TOTAL	397,890

6.2 Appendix 2 – Survey materials



FACE TO FACE: CAPI QUESTIONNAIRE

Job Number	260113528
Name of survey	FCS All Forests Survey 2
Questionnaire Version Number	V3
Author	Duncan Stewart 0131 243 3909/ Vicky Wilson 0131 243 3921

Methodology	Face-to-face
If face-to-face	
Questionnaire	Capi
Duration	
Sample Size	
Sample Description	
Quotas	
Several targets?	
No. open ends	
No. other (specify) questions	



CAPI script records location (forest and access point), date and time of interview.

Full postcode to be captured - only used only for analysis purposes

INTERVIEWER READ OUT

Good Morning/Afternoon/Evening. I am conducting a survey on behalf of **TNS**. The survey is to find out about who visits these Forests and their reasons and frequency of their visits, and I would like to ask you a few questions.

The interview length depends on the answers you provide, but will last on average 8 to 10 minutes.

The information you provide will be treated in the strictest confidence. It will only be used by Forestry Commission Scotland to produce statistical information.

Here is a leaflet that explains your rights under our industry code and the data protection act.

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

IF YES – BEEN INTERVIEWED ALREADY CLOSE. IF NO – NOT BEEN INTERVIEWED CONTINUE WITH SCREENER QUESTIONS

S1. Country of residence

- Scotland
- Other UK
- Overseas (SPECIFY)

S1. Age

- 16-24
- 25-34
- 35-44
- 45-59
- 60+
- Prefer not to say

S2. Gender

- Male
- Female
- Prefer not to say



**S3. Can you tell me the age group and gender of all the people with you on this visit?
Please remember to include yourself.**

IF IN LARGE GROUP/IN A COACH PARTY ONLY RECORD DETAILS OF THE IMMEDIATE PARTY

- Under 5 years
- 5-10 years
- 11-15 years
- 16-24 years
- 25-34 years
- 35-44 years
- 45-59 years
- 60+ years

SHOW SCREEN

S4. What is your ethnic group?

WHITE

- Scottish
- Other British
- Irish
- Gypsy/traveller
- Polish
- Any other white ethnic group (**PLEASE SPECIFY**)

MIXED OR MULTIPLE ETHNIC GROUPS

Any mixed or multiple ethnic groups (**PLEASE SPECIFY**)

ASIAN, ASIAN SCOTTISH, ASIAN BRITISH

- Pakistani, Pakistani Scottish or Pakistani British
- Indian, Indian Scottish or Indian British
- Bangladeshi, Bangladeshi Scottish or Bangladeshi British
- Chinese, Chinese Scottish or Chinese British
- Other (**PLEASE SPECIFY**)

AFRICAN

- African, African Scottish or African British
- Other (**PLEASE SPECIFY**)

CARIBBEAN OR BLACK

- Caribbean, Caribbean Scottish or Caribbean British
- Black, Black Scottish or Black British
- Other (**PLEASE SPECIFY**)

OTHER ETHNIC GROUP

- Arab, Arab Scottish or Arab British
- Other (**PLEASE SPECIFY**)
- I would prefer not to disclose my ethnic group



SHOW SCREEN

S5. What is your religion or belief? Please just read out the number next to the description. If you prefer you may skip this question by selecting the appropriate option.

- None
- Church of Scotland
- Roman Catholic
- Other Christian (**PLEASE SPECIFY**)
- Muslim
- Buddist
- Sikh
- Jewish
- Hindu
- Any other religion or belief (**PLEASE SPECIFY**)
- I would prefer not to disclose my religion/beliefs

S6. DISABILITY – do you consider yourself as a disabled person? Disability legislation defines disability as any long-term (which have lasted, or are expected to last, at least 12 months) illness, health problem or disability which limits your daily activities or the work you can do.

- Yes
- No
- I would prefer not to disclose my disability

SHOW SCREEN IF ANSWERING YES AT S6

S7. If yes, please read out the description(s) that apply.

- Deafness or partial hearing loss
- Blindness or partial site loss
- Learning disability (eg Down's Syndrome)
- Learning difficulty (eg dyslexia)
- Development disorder (eg Autistic spectrum disorder)
- Physical disability
- Mental health condition
- Long-term illness, disease or condition
- Other condition (PLEASE SPECIFY)



SHOW SCREEN – ALLOW RESPONDENT TO SELF COMPLETE

S8. Which of the options on this card best describes how you think of yourself? If you prefer you may skip this question by selecting the appropriate option.

- Heterosexual
- Gay man
- Gay woman/lesbian
- Bisexual
- I would prefer not to disclose my sexual orientation

Q1a). Have you travelled from home today?

- Yes
- No

Q1b). And will you be returning home later today?

- Yes
- No

IF RESPONDENT HAS TRAVELLED FROM HOME AND IS RETURNING HOME TODAY Q.1A AND Q.1B) GO TO Q3.

IF RESPONDENT HAS NOT TRAVELLED FROM HOME AND/OR IS NOT RETURNING HOME TONIGHT AT Q1A AND/OR Q1B) ASK Q2

SHOW SCREEN E

IF RESPONDENT DID NOT TRAVEL FROM HOME TODAY ASK:

Q2a). What type of accommodation did you stay in last night?

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

What type of accommodation will you stay in tonight?

SINGLE CODE

- Tent/Caravan/Cabin
- Guest House/Bed and Breakfast
- Hotel
- Staying with friends/relatives
- Youth Hostel/Outdoor Centre
- Self-catering
- Other (**PLEASE SPECIFY**)

Q2b). How many nights in total will you be spending away from home during your current trip?

PLEASE WRITE IN ANSWER

OPEN ENDED QUESTION



Q2c). And how many nights of these nights, if any, will you be spending in Scotland?
PLEASE WRITE IN ANSWER

OPEN ENDED QUESTION

Q2d). During your trip away from home, how many times will you set out specifically to visit a forest or wood? Please include your current trip.
REMEMBER TO INCLUDE CURRENT FOREST VISIT.

PLEASE WRITE IN ANSWER

OPEN ENDED QUESTION

ASK ALL
SHOW SCREEN F

Q3. How far did you travel to get here today, from your home or accommodation?
SINGLE CODE. NOTE - THIS IS ONE DIRECTION ONLY.

Less than 6 miles/ 10 km
6 to 15 miles/ 11 to 25 km
16 to 25 miles/ 26 to 40 km
26 to 50 miles/ 41 to 80 km
Over 50 miles/ Over 80 km
Don't Know

SHOW SCREEN G

Q4a What was the main type of transport you used to get here today?
SINGLE CODE TRANSPORT USED TO TRAVEL THE LONGEST PART OF THEIR JOURNEY

Car/ Van
Minibus/Coach
Public transport (scheduled bus, train, taxi, etc.)
Bicycle
Walked
Other (**PLEASE SPECIFY**)



ASK THE FOLLOWING TO ALL VISITORS REGARDLESS OF HOW THEY ARRIVED AT THE WOODLAND SITE TODAY

Q4b Using the answers shown on the screen, how would you rate the value for money of charge applied for parking at this woodland.

INTERVIEWER – CLARIFY CHARGES BEFORE COMMENCING INTERVIEWS AND PROVIDE AS CLARIFIATION TO RESPONDENT IF ASKED. IF NONE SKIP QUESTION BY USING 'NOT CHARGING' CODE

- Extremely good value for money
- Good value for money
- Poor value for money
- Extremely poor value for money

-
- Don't know
 - Not a charging site
 - Not aware of charges

Q5a). Have you been to this woodland site/ here* before?

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

- Yes
- No

IF ANSWERED YES AT Q5A CONTINUE TO Q5B. IF ANSWERED NO AT Q5A SKIP TO Q6

ASK IF ANSWERED YES AT Q5A

SHOW SCREEN H

Q5b). How often, on average, do you come here?

SINGLE CODE

- More than once a day
- Once a day
- 1 to 3 times a week
- 1 to 3 times a month
- 1 to 3 times a year
- Less often
- Don't Know



**ASK ALL
SHOW SCREEN J**

**Q6. What was your main activity during your visit today?
SINGLE CODE**

- Dog walking
- Other walking
- Cycling/ Mountainbiking on waymarked tracks
- Cycling/ Mountainbiking off waymarked tracks
- Horse riding
- Picnic
- Seeing something in the woodland (e.g sculptures, wildlife, trees, waterfalls)
- Just passing through
- An organised event (**PLEASE SPECIFY**)
- Other activity (**PLEASE SPECIFY**)

Q7. How long have you been in *this woodland/ here today?
*IF YOU ARE INTERVIEWING IN NON-WOODED AREA USE 'HERE'**

PLEASE RECORD TO THE NEAREST 15 MINUTES

OPEN ENDED IN HOURS AND MINUTES

IF NOT STAYING AWAY FROM HOME AT Q1A AND Q1B SKIP TO Q8B

Q8. Next I would like to ask you about your spending TODAY

Q8a). How much did you personally spend on accommodation (including food and drink at the accommodation) LAST NIGHT?

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

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

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



**ASK ALL
SHOW SCREEN K**

Q8(b-h) Can you tell me how much you PERSONALLY have spent/will spend TODAY on each of the following categories. That is the amount you have spent today already plus that which you will spend later today. Please include the amount spent/you will spend on any others (adults and children) for whom you have paid/will pay. If you are on a business trip please include any expenditure paid for by your company

IF RESPONDENT IS UNABLE TO GIVE SPENDING ON EACH CATEGORY ASK FOR THEIR TOTAL SPENDING TODAY

WRITE IN BELOW UNDER APPROPRIATE AREA. IF RESPONDENT DOES NOT KNOW EXACT AMOUNT AN ESTIMATE WILL DO. DO NOT LEAVE BLANK.

IF NOTHING WRITE IN 0 0 0. IF DON'T KNOW WRITE IN D/K

COLUMNS

£

ROWS

- Accommodation (inc. food & drink)
- Food and drink (excluding at accommodation)
- Admission fees (to attractions)
- Shopping (non-routine, e.g. souvenirs)
- Transport (including fuel, taxis, public transport etc.)
- Equipment (e.g. hire of boat, horse-riding)
- Other miscellaneous items
- TOTAL

COLLECT CLASSIFICATION DETAILS AND THANK RESPONDENT

ALL FORESTS SURVEY 2012-2013

PEOPLE COUNTING SHEET

Location Code

--	--	--	--	--	--	--	--

Interviewer name

Location name:

--

Shift date:

Day

--	--

Month

--

Shift start time

--	--	--	--

(24 hour clock)

Shift end time

--	--	--	--

(24 hour clock)

ALL FORESTS SURVEY 2012-2013

VEHICLE COUNTER CALIBRATION SHEET

Location Code

--	--	--	--	--	--	--	--

Interviewer name

Location name:

--

Shift date:

Day	Month					
<table border="1" style="display: inline-table; width: 40px; height: 20px;"> <tr> <td style="width: 20px;"></td> <td style="width: 20px;"></td> </tr> </table>			<table border="1" style="display: inline-table; width: 60px; height: 20px;"> <tr> <td style="width: 20px;"></td> <td style="width: 20px;"></td> <td style="width: 20px;"></td> </tr> </table>			

Shift start time

<table border="1" style="display: inline-table; width: 100px; height: 20px;"> <tr> <td style="width: 25px;"></td> <td style="width: 25px;"></td> <td style="width: 25px;"></td> <td style="width: 25px;"></td> </tr> </table>					(24 hour clock)

Shift end time

<table border="1" style="display: inline-table; width: 100px; height: 20px;"> <tr> <td style="width: 25px;"></td> <td style="width: 25px;"></td> <td style="width: 25px;"></td> <td style="width: 25px;"></td> </tr> </table>					(24 hour clock)

SEE BRIEFING NOTE TO ENSURE YOU ARE CLEAR OF WHAT TO RECORD. RECORD DETAILS OF EACH MOTORISED VEHICLE ARRIVING AND LEAVING ON SHEET OVERLEAF AND TOTALS FOR VISITORS ARRIVING BY FOOT, BICYCLE OR OTHER MODES (INCLUDING PRAMS) BELOW.

	Arriving	Leaving
<p>Visitors on foot Use five bar gates the count up and write in total e.g.</p> <p> (12)</p>		
<p>Visitors on bicycles</p>		
<p>Other visitors not in vehicles (inc children in prams)</p>		

