



**THE FOREST OF DEAN
VISITOR SURVEY
2005**

**CONDUCTED BY HEART OF ENGLAND TOURISM ON
BEHALF OF THE FOREST OF DEAN DISTRICT COUNCIL**

INTRODUCTION AND METHODOLOGY

Introduction

Heart of England Tourism was commissioned by the Forest of Dean District Council in 2005 to undertake a major market research appraisal of the profile, behaviour, perceptions and value of those visiting the Forest of Dean. The research incorporates users of the area for leisure purposes and therefore takes into account the significant level of activity in the Forest by 'local residents' as well as 'bona fide' visitors. For the purpose of this report, however, the term 'visitor' is used as a general description of all user groups.

The survey results provide important baseline data to assist the Forest of Dean District Council to appreciate the profile and importance of visitors to the Forest of Dean and to identify the level of tourism spend in the local economy. Such market research is a basic tool of strategic planning.

Objectives of the Survey

The key objectives of the research were;

- To identify visitor profiles and the origin of visitors to the Forest of Dean clearly including the main visitor market sectors e.g. day visitors, overnight (both domestic and overseas) and those who are touring through the area.
- The survey period would include both peak and off peak seasons.
- Gain a detailed understanding of visitor motivations, use of information before and during their trip, plus opinions of all aspects of the destination in terms of value for money, quality of tourism facilities, customer service, infrastructure, cleanliness etc.
- To gain an understanding of activities by visitors during their stay, including movement within the Forest of Dean and use of transport to and within the District.
- To determine perceptions of the area by both new and repeat visitors helping to identify future marketing and branding activities.
- To identify the importance of visitors in terms of levels of spend by the different market segments.
- To identify future developments to attract visitors to the Forest of Dean area.

Acknowledgements

The study has received great support from the client team and has been co-ordinated and analysed at HET by Kate Darch, Research Officer and Christine King, Research Manager. This study provides a framework for constructive dialogue between the Forest of Dean District Council and other tourism providers in the area. All can benefit from the findings and it should assist future tourism promotion and development in the Forest of Dean.

Methodology

The Forest of Dean Visitor Survey was carried out over a 5 month period from June 2005 to October 2005, with interviewing taking place on a total of 40 days, incorporating weekdays, weekends and Bank Holidays.

A total of 669 people were interviewed at 14 locations over the course of the survey period. Surveying was undertaken at various types of locations across the Forest of Dean, including attractions and key locations.

Interviewing dates were scheduled to achieve a spread of weekdays and weekends. The breakdown was 54% of interviews on weekdays and 46% on weekends.

The survey was conducted on a simple random basis. Interviewers asked the 'next person to pass' if they would participate. Design of the questionnaire comprised 5 main areas including; user profile, origin, behaviour, value and perception.

The table below shows the breakdown of the locations used for interviewing.

	No. Interviews	% of Total Sample
Symonds Yat Rock	97	14%
Beechenhurst/Sculpture Trail	84	13%
The Dean Heritage Centre	66	10%
Pedalabikeaway Cycle Centre	56	8%
Puzzlewood	55	8%
Cannop Ponds	55	8%
Newent Lake	48	7%
Mallards Pike	35	5%
The Dean Forest Railway	32	5%
Clearwell Caves	32	5%
The Model Village	32	5%
Harts Barn Craft Centre	31	5%
The Mohair Countryside Centre	31	5%
Three Choirs Vineyard	15	2%

It is acknowledged that on-site visitor surveys are liable to under-count certain sections of the visitor market. These include large-moving groups, i.e. groups, coach parties. In the case of overseas visitors, under counting may occur where a problem arises in translation, in the interpretation of questions and in some cases a reluctance to become involved with what appears to be officials/government. Given the perceived importance of overseas markets, interviewers monitor the level of non-response (for all types of visitor) to check that certain nationalities are not under represented. If a person declined the offer of an interview, they were asked to state where they were from (UK, country) and thanked for their co-operation.

Of the 669 interviews, 23% were undertaken in July, 54% in August, 20% in September and 2% in October.

1.0 TYPE OF VISITOR

1.01 Visitor Segmentation

The survey data has been analysed in two ways. Firstly, by considering all visitors as a single market and secondly, by segmenting visitors into different groups according to the type of trip made. This approach helps to establish the differences and similarities between different types of visitor. Detailed information about various groups of visitors will assist in improving the effectiveness of marketing activities, visitor management and product development.

Visitors can be divided into three segments according to the type of trip they are making to the county:

- ❖ **Day Visitors:** *The "day out" market - visitors, who start their journey from home and return there on the same day, includes independents and groups.*
- ❖ **Touring Visitors:** *Those visitors who are staying overnight away from home, but are not staying overnight in the Forest of Dean. For example a family on holiday in Worcestershire may come to the Forest of Dean for a day **or** someone stopping off in the Forest of Dean en-route from home to another holiday destination.*
- ❖ **Overnight Visitors:** *Those visitors who spend one or more nights in the Forest of Dean. This sector of the market includes those staying with family and friends as well as those using commercial accommodation.*

These three groups are subdivided into visitors who are resident in the UK and those from overseas. Figure 1 illustrates the structure of the survey sample visitor market according to the type of trip made.

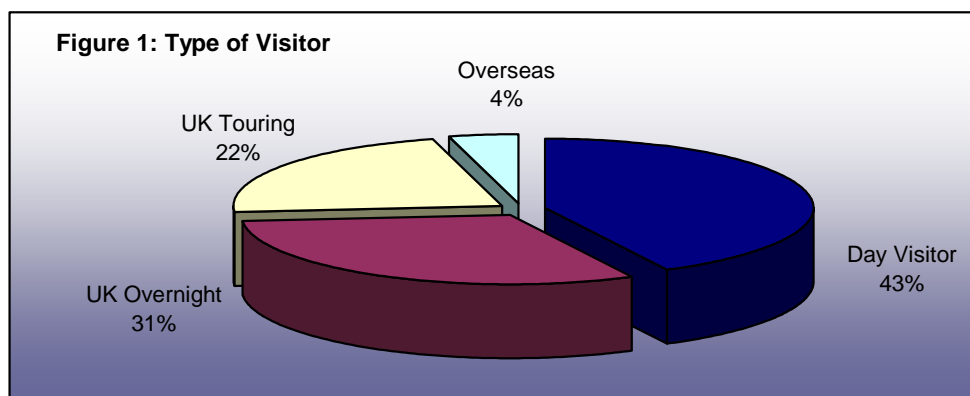
Over two fifths (43%) of visitors to the Forest of Dean, at all interview locations, are **on a day visit** from home.

22% of domestic visitors are classified as being in the touring group. The touring market is important, yet often overlooked or hidden within the day visitor sector.

Domestic visitors staying overnight accounted for almost a third (31%) of the market; a fairly high proportion.

4% of visitors to the Forest of Dean are **overseas visitors**. Because the sample is small overseas visitors have been combined and not split into overnight and touring visitors.

The complex structure of Forest of Dean's visitor markets reinforces the view that there is no such thing as a typical visitor. The touring and overnight sectors can be divided into the domestic (UK) and the overseas markets.



The importance of the overnight visitor market should be recognised in terms of its economic impact and as potential growth markets for the future.

In order to put Forest of Dean’s visitor market into context, it is worth comparing it to other destinations in the Heart of England Region. Table 1.1 shows that each local area has its own distinct market mix.

Table 1.1: Type of Visitor – Regional Comparison

	Day Visitor	Touring UK	Overnight UK	Overseas
Forest of Dean 2005	43%	22%	31%	4%
Forest of Dean 1999	35%	28%	32%	5%
Worcestershire 2005	56%	17%	21%	6%
Staffordshire 2005	71%	3%	21%	5%
Herefordshire 2002	36%	21%	37%	5%

The Forest of Dean is fairly dependent upon the day trip market. Since 1999 day visitors have risen slightly (43% compared to 35%) and overnight UK visitors fallen slightly by 1%.

1.02 Visitor Type by Location

The type of visitor interview at the various locations across the Forest of Dean is shown in the table below.

	Day Visitor	Touring UK	Overnight UK	Overseas
Symonds Yat Rock	29%	25%	41%	5%
Beechenhurst/Sculpture Trail	46%	19%	30%	5%
The Dean Heritage Centre	35%	33%	24%	8%
Pedalabikeaway Cycle Centre	57%	20%	21%	2%
Puzzlewood	27%	25%	45%	2%
Cannop Ponds	51%	13%	31%	5%
Newent Lake	35%	29%	33%	2%
Mallards Pike	49%	31%	17%	3%
The Dean Forest Railway	53%	16%	25%	6%
Clearwell Caves	31%	28%	38%	3%
The Model Village	50%	19%	28%	3%
Harts Barn Craft Centre	35%	16%	45%	3%
The Mohair Countryside Centre	68%	10%	19%	3%
Three Choirs Vineyard	53%	20%	20%	7%

The different range of attractions/locations within the Forest of Dean seem to appeal to differing market sectors. For example overnight domestic visitors were more likely to visit Symonds Yat Rock (41%) than other segments. Beechenhurst was popular for day visitors (46%) as was Pedalabikeaway (57%).

Touring visitors were more likely to visit the Dean Heritage Centre than any other site (33%) as were overseas visitors (8%).

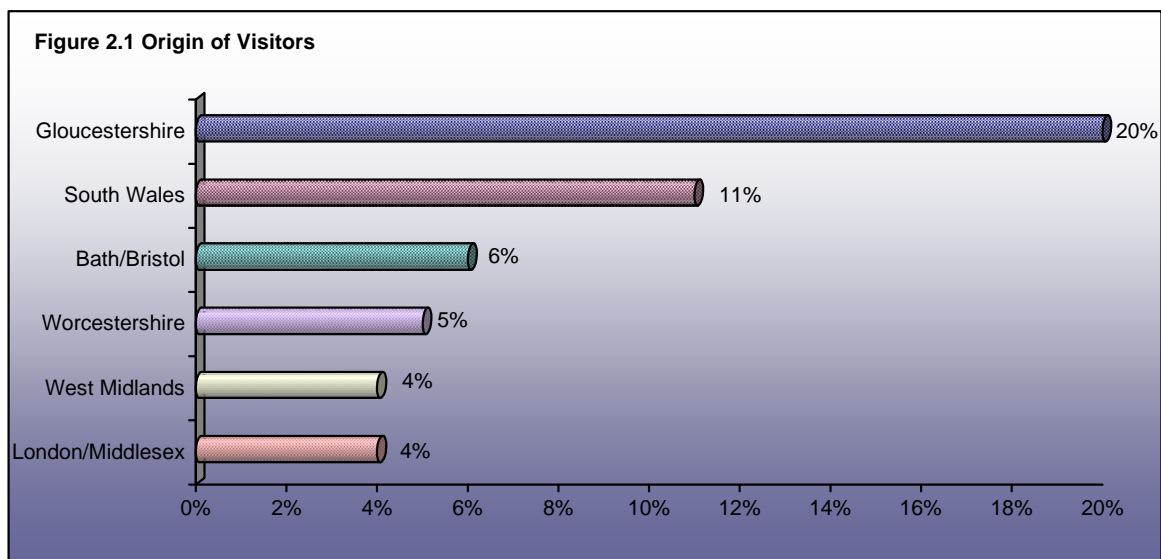
2.0 ORIGIN OF VISITORS

Respondents were asked to state their normal place of residence. For domestic (UK) visitors the county of origin has been used as the basis for analysis and for overseas residents the country of origin is used. The data has been analysed according to four main types of visit – UK day, UK overnight, UK touring and overseas visitors. This is the first step towards more detailed market segmentation.

The majority (96%) of visitors interviewed in the Forest of Dean were from the UK. The remaining 4% were from overseas.

2.01 UK VISITORS

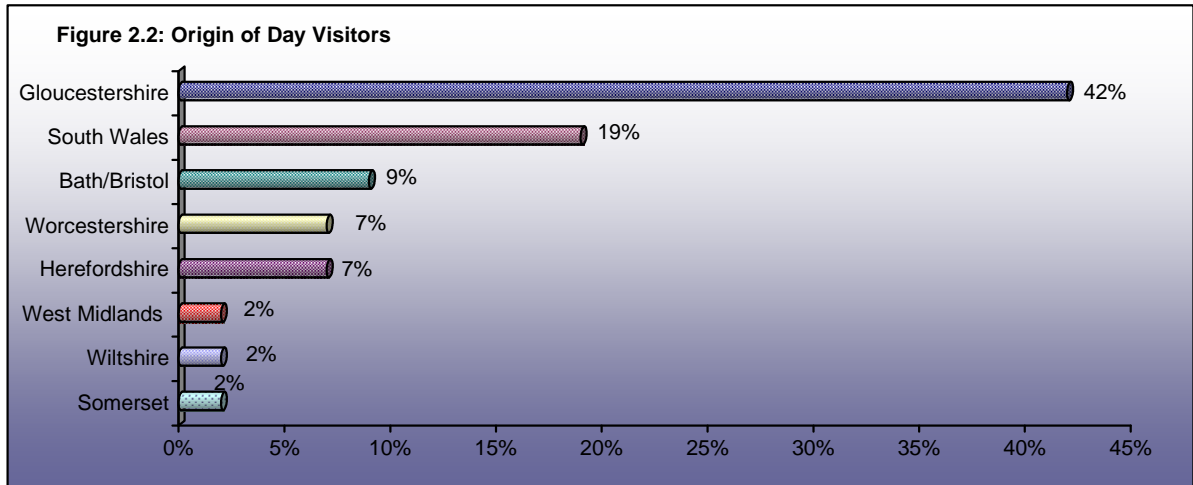
As the chart below indicates, a fifth (20%) of UK visitors originated from the parent county of Gloucestershire. 11% of visitors to the Forest of Dean originated in South Wales, 6% in the Bath/Bristol area and 5% from Worcestershire. A further 4% of respondents stated that they came from London/Middlesex and the West Midlands respectively.



2.02 UK DAY VISITORS

The catchment area for the day trip sector is broad, but is mainly drawn from the areas surrounding the Forest of Dean area.

All day visitors interviewed were from the UK. The large majority (70%) originated in the neighbouring areas of Gloucestershire (42%), South Wales (19%) and Bath/Bristol (9%). Worcestershire and Herefordshire accounted for 7% of respondents respectively.



The core market is tightly focused, with the bulk of such visitors drawn from Gloucestershire, Herefordshire and the neighbouring counties, accessible by quality road systems.

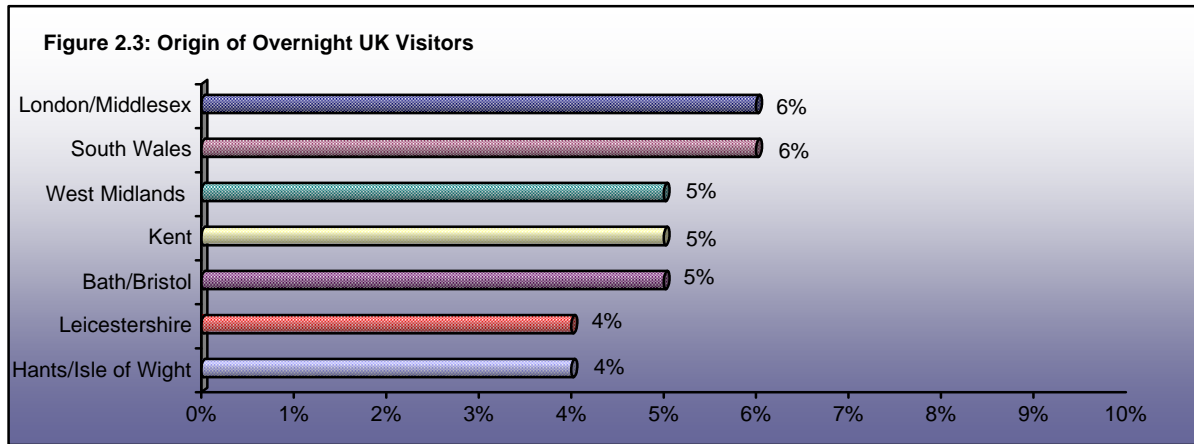
Unsurprisingly, the main counties/locations named all lie within an approximate 1½ hours driving time from the Forest of Dean.

The day visitor market is extremely competitive and will continue to be so, with competition coming from other destinations and other leisure activities (home entertainment, leisure retail parks, etc).

Future promotional campaigns can take account of such information in order to target the existing and potential day visitor markets in a more efficient manner.

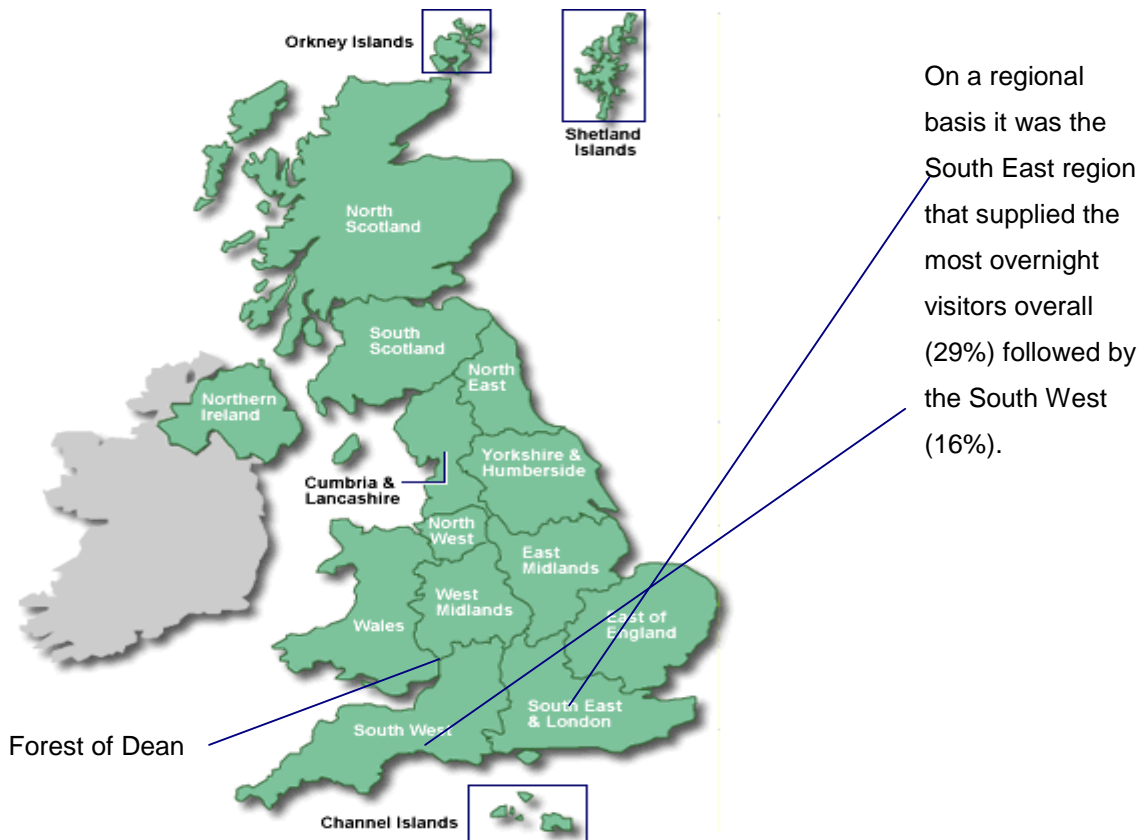
2.03 UK OVERNIGHT VISITORS

Just under a third (31%) of all visitors surveyed (209no) were UK residents staying overnight in the Forest of Dean. The overnight visitor market is of particular importance to the area in terms of economic impact. Overnight visitors traditionally not only stay longer than day visitors but also spend more on a daily basis.



N.B: The information on overnight visitors includes those staying in many types of accommodation, i.e. friends, relatives, camping, caravans and boats as well as in serviced accommodation.

Overnight visitors to the Forest of Dean tend to originate in London/Middlesex (6%) and South Wales (6%), followed by the West Midlands (5%).



2.04 OVERSEAS VISITORS

4% of visitors interviewed in the Forest of Dean were overseas residents, almost a fifth (18%) of whom were from the Netherlands. 14% of overseas visitors who were on a visit to the area stated that they were from Australia. 11% of respondents were from Italy, the USA and South Africa respectively.

NETHERLANDS	18%
AUSTRALIA	14%
ITALY	11%
USA	11%
SOUTH AFRICA	11%
FRANCE	7%
SPAIN	7%
GERMANY	4%
DENMARK	4%
REST OF ASIA	4%
NEW ZEALAND	4%
MIDDLE EAST	4%
OTHER OVERSEAS	4%
TOTAL	100%

The overseas visitor market could have a significant economic impact for The Forest of Dean as a whole. Research undertaken in other parts of the Heart of England show that visitors from overseas stay longer and spend more per day than other types of visitor.

The table overleaf shows how the Forest of Dean's overall overseas visitor market compares with other areas both the Heart of England and the South West regional averages (*International Passenger Survey 2004*).

TABLE 2.2: ORIGIN OF OVERSEAS VISITORS –COMPARISONS						
	Netherlands	Australia	Italy	USA	RSA	France
The Forest of Dean 2005	18%	14%	11%	11%	11%	7%
<i>South West 2004</i>	7%	6%	4%	13%	1%	13%
<i>HET 2004</i>	6%	3%	4%	11%	1%	9%
<i>Wye Valley AONB 2004</i>	6%	12%	3%	33%	3%	5%
<i>Herefordshire 2002</i>	4%	14%	*	23%	*	6%
<i>Malvern Hills AONB 2000</i>	13%	19%	6%	16%	10%	*

The overseas visitor market in the Forest of Dean is quite dependent upon particular nationalities.

Areas in the vicinity of the Forest of Dean such as the Wye Valley, Herefordshire and the Malvern Hills AONB all rely on visitors from the same overseas countries.

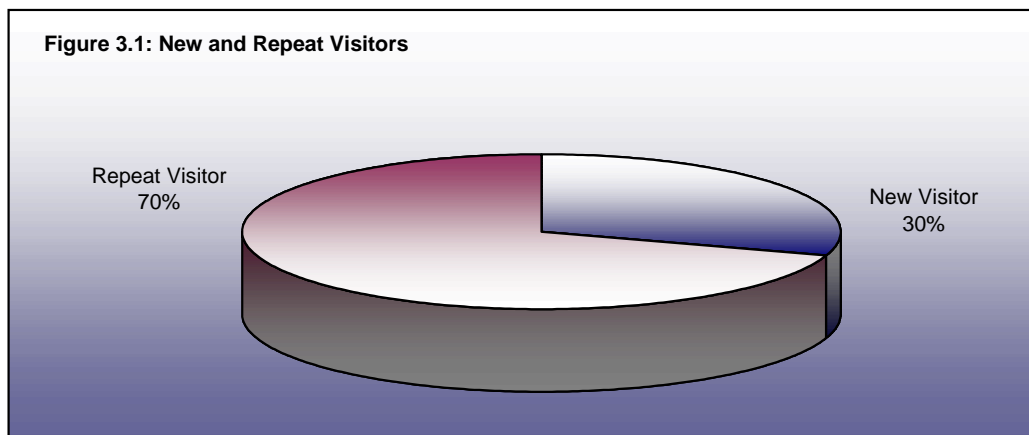
Visitors from the USA feature heavily in all areas but compared to the Wye Valley AONB in 2004 (33%) the Forest of Dean had substantially less visitors from the USA (11%), however the Forest of Dean had a high proportion of visitors from the Netherlands (18%), higher than both the regional averages of the West Midlands and the South West.

3.0 NEW / REPEAT VISITORS

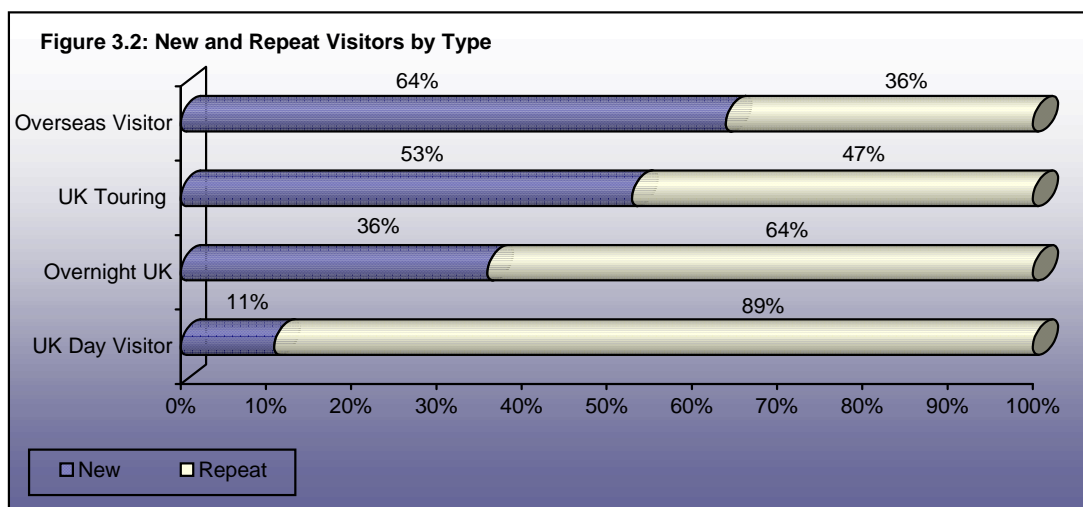
3.01 Segment Variation

Visitors were asked if they had ever been to the Forest of Dean on a previous occasion and, if so, what type of trip it had been. The presence of first time visitors to the forest is important in terms of visitor management, presuming their lack of local knowledge of the local area.

In many respects, the repeat visitor is the easier to attract as they will know the general nature of what a visit is likely to involve, for example, how long it takes to get there, what there is to see and do. It is worth noting, however, that being a repeat visitor does not automatically mean that the knowledge of the Forest of Dean, the surrounding area and its attractions is comprehensive and, furthermore, repeat visitors may have entrenched patterns of behaviour that it may be difficult to influence through visitor management.



The chart below indicates the variation in new and repeat visitors between the various market segments.



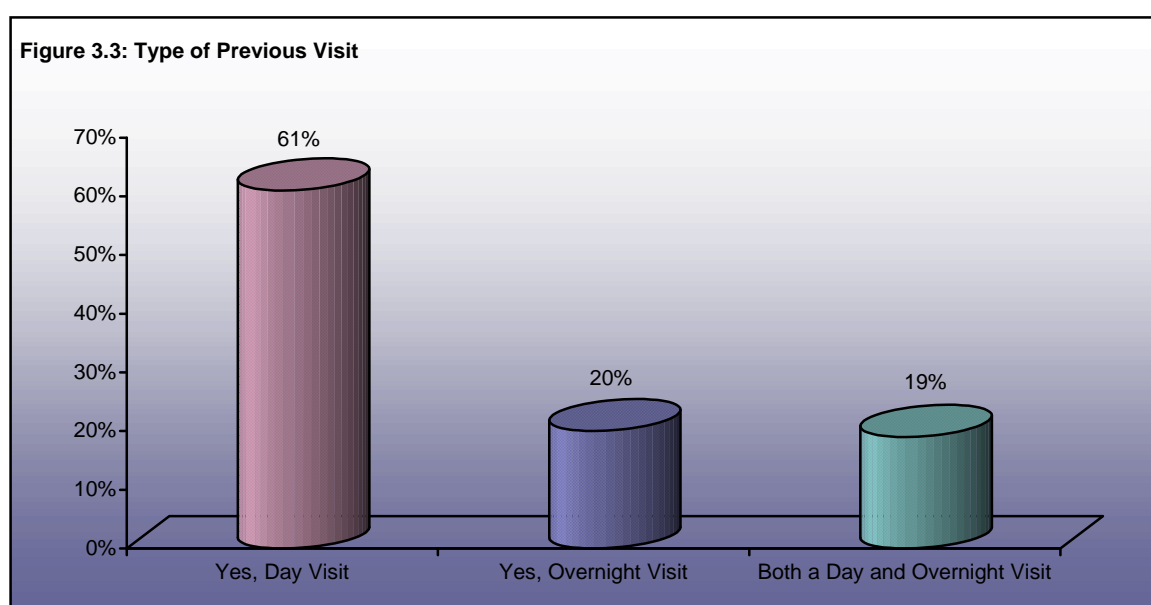
In 1999 the Forest of Dean saw a slightly higher proportion of new visitors (36%) compared to 30% in 2005.

For the UK day visitor market, there are significantly greater proportions of repeat (89%), as opposed to new visitors (11%). In contrast, this trend is reversed for overseas visitors, with a greater concentration of first time visitors, as would be expected.

3.02 Previous Visits to the Forest of Dean

Having identified the new and repeat elements, visitors were then asked what type of trip they had made in the past. Of the total market, almost two thirds (61%) of visitors had previously been to the forest as a day visitor, and 20% had previously stayed overnight.

As the chart shows, a further 19% of repeat visitors had previously been to the Forest of Dean for both a day and staying visit.



The table below highlights the different characteristics of the market segments with respect to the type of previous visit made. *Given the low sample of repeat overseas visitors (10no), the breakdown must be interpreted with caution.*

TABLE 3.1: PREVIOUS VISIT BY MARKET SEGMENT						
PREVIOUS VISIT	2005	1999	UK Day Visitor	UK Touring	Overnight UK	Overseas
Day Visit	61%	42%	82%	64%	21%	60%
Overnight Visit	20%	26%	4%	21%	49%	20%
Both Day and Overnight	19%	32%	13%	14%	31%	20%

Of the UK day visitors who had previously visited the Forest of Dean, the vast majority (82%) were undertaking a similar trip to that taken before i.e. they had previously been on a day trip and were here now on a day trip. Only 4% had visited before as overnight visitors.

For UK touring visitors, 64% had visited the area on a previous occasion. Amongst this segment, 64% had been as day visitors, but were now touring through overnight. This provides a positive indication for Forest of Dean managers that with effective marketing, a proportion of day visitors can be converted into staying visitors, mirrored by an increase in their value or contribution to the local economy.

3.03 Number of Times Visited in the Last 12 Months

Visitors who had been to the Forest of Dean before were asked how many times they had visited in the past five years. A number of respondents gave the vague response of 'many' or 'frequently' and therefore it is not possible to calculate an accurate average number of visits.

However, from the more precise responses it is estimated that repeat visitors had made, on average, 4.0 trips to the Forest of Dean in the past five years, although given the more frequent local visitors, this figure could be higher.

The table below details the variation in the average number of visits to the Forest of Dean in the last five years for each market segment, indicating, as expected, a greater frequency of visits amongst day visitors.

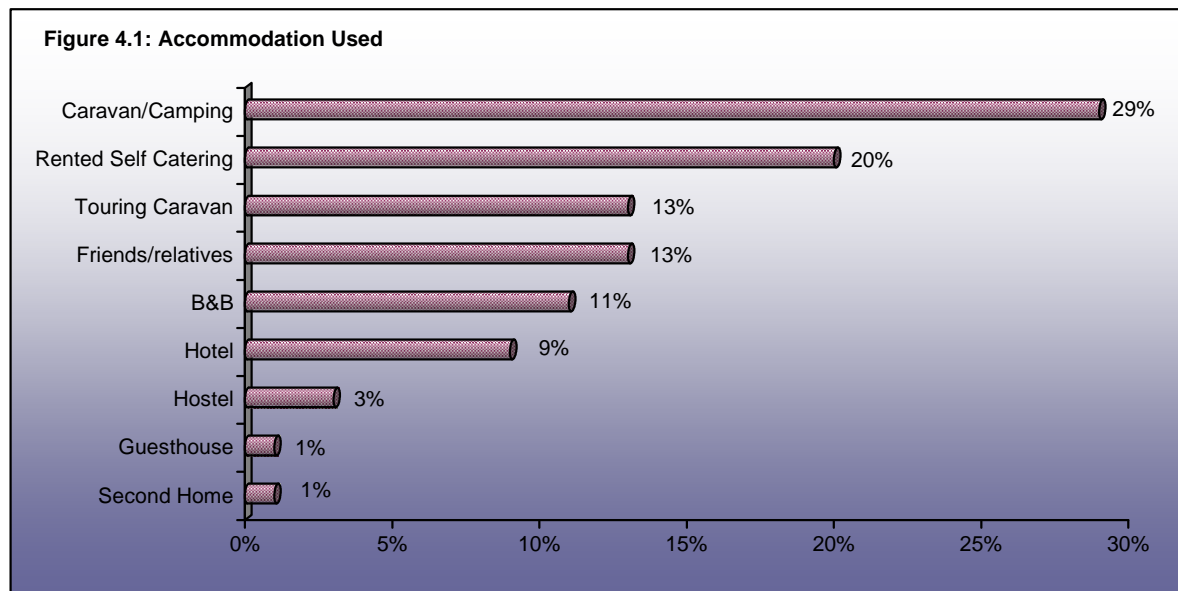
TABLE 3.2: NUMBER OF VISITS TO THE FOREST OF DEAN IN THE LAST 12 MONTHS					
	Average	UK Day Visitor	Overnight UK	UK Touring	Overseas
Average No. Visits	4.0	4.7	3.6	2.8	2.9*

** Please note that the sample base for repeat overseas visitors is small (10no) and should be treated with caution.*

4.0 ACCOMMODATION

4.01 Accommodation used in the Forest of Dean

The chart below shows the type of accommodation used by overnight visitors in the Forest of Dean.



Given the nature of the area and the provision of camping/caravanning facilities it is not surprising that over a quarter (29%) of those staying overnight in the Forest of Dean were staying on a campsite or in caravan accommodation.

Self catering accommodation was used by a fifth (20%) of all overnight visitors, significantly higher than in the Wye Valley AONB in 2004 (12%) when a similar study was undertaken.

The wider self catering sector however represents an important market for the Forest of Dean, with non serviced sources (including caravan and camping, touring caravans, self catering and youth hostels) accounting for 63% of all overnight accommodation.

TABLE 4.1: ACCOMMODATION USED		
	2005	1999
Camping	29%	24%
Self Catering	20%	19%
Touring Caravan	13%	14%
Friends or Relatives	13%	18%
Bed and Breakfast	11%	8%
Hotel	9%	9%
Youth Hostel	3%	2%

Repeat visitors to the Forest of Dean were more likely to stay in caravan and camping accommodation (34%) than new visitors (22%). However, the trend is reversed when talking about self catering accommodation, where 30% of new visitors stayed in this type of accommodation compared to 14% of repeat visitors.

Repeat visitors were more likely to stay with friends or relatives (16%) than new visitors (8%).

TABLE 4.2: ACCOMMODATION – NEW AND REPEAT VISITORS			
	OVERALL	REPEAT VISITORS	NEW VISITORS
Caravan and Camping	29%	34%	22%
Self Catering	20%	14%	30%
Touring Caravan	13%	13%	13%
Friends or Relatives	13%	16%	8%
Bed and Breakfast	11%	10%	12%
Hotel	9%	9%	9%
Youth Hostel	3%	3%	3%

4.02 Accommodation Ratings

Visitors were asked to rate their accommodation in the Forest of Dean based on, range of accommodation, quality of service and value for money. (*Ratings were given on a scale of 1-5, 5 being very good and 1 very poor*).

The table below shows a breakdown of scores by type of accommodation stayed in. Please note that not everyone who stayed overnight in the Forest of Dean area gave an answer to this question.

TABLE 4.3: RATING OF ACCOMMODATION			
	RANGE	QUALITY OF SERVICE	VALUE FOR MONEY
Overall	4.23	4.36	4.38
Caravan and Camping	4.21	4.19	4.29
Touring Caravan	4.18	4.52	4.46
Bed and Breakfast	4.39	4.54	4.46
Hotel	4.20	4.56	4.41
Youth Hostel	3.67	4.00	4.29

Bed and breakfast accommodation was thought to have the greatest range in the Forest of Dean scoring 4.39 out of a possible 5.

Hotels were given the best score for quality of service (4.56) and touring caravans in the Forest of Dean and bed and breakfast accommodation were thought to be the best value for money (4.46 respectively).

Overall, most types of accommodation in the Forest of Dean received positive scores.

5.0 LENGTH OF STAY

5.01 Overnight Visitors

Respondents were asked how many nights they were spending away from home in the survey area. Analysis of all visitors (UK and overseas) staying overnight in the Forest of Dean reveals an average length of stay of **5.2 nights**. For domestic visitors, the average length of stay was **5.0 nights**, and for overseas visitors, **9.5 nights**.

These 'average lengths of stay' are slightly higher than those seen in other local visitor surveys (as indicated in table the table below).

TABLE 5.1: COMPARATIVE AVERAGE LENGTH OF STAY FOR OVERNIGHT VISITORS (NIGHTS)				
	Forest of Dean 2005	Forest of Dean 1999	Wye Valley AONB 2004	Herefordshire 2002
Overall	5.2	5.7	4.0	6.9
Domestic Visitors	5.0	4.9	3.9	5.0
Overseas Visitors	9.5	6.3	6.3	8.8

The table below illustrates the breakdown of length of stay for overnight visitors. Over half (55%) of those staying overnight in the Forest of Dean are on a short break of 1-3 nights.

TABLE 5.2: LENGTH OF STAY – NIGHTS				
		Total	UK Overnight	Overseas Overnight
SHORT BREAKS	1 night	13%	12%	22%
	2 nights	26%	26%	11%
	3 nights	16%	16%	11%
LONG STAY	4 nights	10%	10%	11%
	5 nights	5%	5%	*
	6 nights	5%	5%	*
	7 nights	17%	17%	33%
	8+ nights	8%	8%	11%

N.B the sample size for overseas visitors is small and therefore should be treated with caution.

Variations in the length of stay are seen when comparing the various accommodation types used, as indicated in the table below. For the UK market, the average length of stay varies significantly between accommodation types, from an average of 2.5 nights for those staying in serviced accommodation, to 6.2 nights in self catering accommodation.

For the overseas overnight market, the average length of stay was significantly longer than the domestic market, at 9.5 nights. *However, this analysis is based on data from only 28 respondents and, therefore, must be viewed as indicative rather than statistically robust.*

TABLE 5.3: AVERAGE LENGTH OF VISIT		
ALL UK OVERNIGHT		5.2 nights
UK Overnight	serviced accommodation	2.5 nights
	self-catering	6.2 nights
	caravan / camping	4.3 nights
	friends / relatives	4.0 nights
	youth hostel	1.8 nights
ALL OVERSEAS OVERNIGHT		9.5 nights
Overseas Overnight	serviced accommodation	2.0 nights
	friends / relatives	6.5 nights

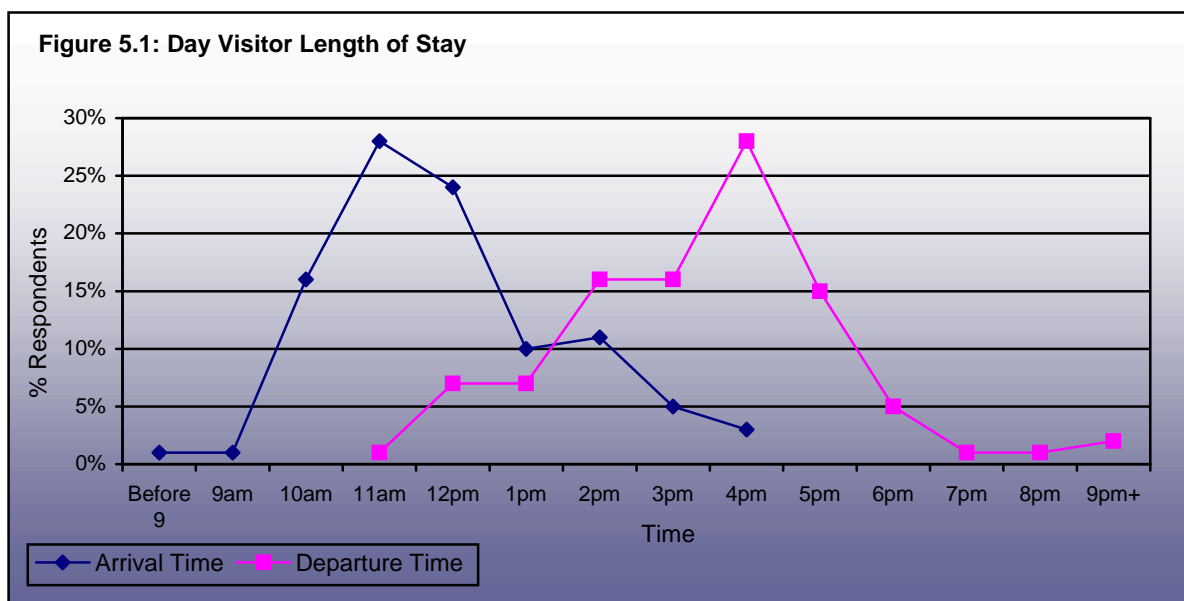
5.02 Day / Touring Visitor Length of Stay

The 404(no) respondents who were in the Forest of Dean for a day or touring visit were asked how long (in hours) they intended to spend in the area. The average (mean) time was **4 hours and 42 minutes**. The table below indicates the variation in time spent in the Forest of Dean by day / touring visitors.

TABLE 5.4: DAY / TOURING VISITORS HOURS IN THE FOREST OF DEAN	
1 - 2 hours	1%
3 - 4 hours	59%
5 - 6 hours	36%
7 hours+	3%

The average length of time spent in the Forest of Dean by new visitors is 4 hours 33 minutes, comparable with repeat visitors who also spent an average of 5 hours and 08 minutes in the area.

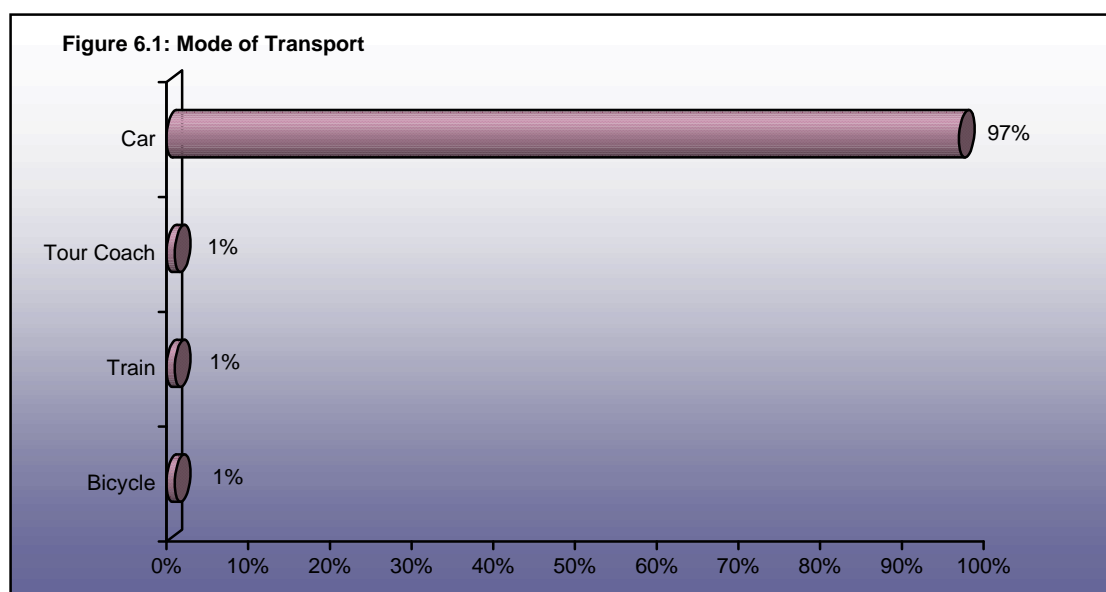
Visitors were asked to specify the time that they had arrived in the Forest of Dean and what time they intended to leave. The chart below illustrates the fluctuation in visitor arrival and departure times throughout the day, indicating a peak in arrivals between 10am and 11am and departures between 4pm and 5pm.



6.0 MODE OF TRANSPORT

For most visitor surveys, the principal mode of transport used to arrive at a visitor destination is the car. Across the Heart of England region, around 76% of all trips are made by the private car.

Due to the rural area surrounding the Forest of Dean transport links are few, as a result visits to the area by car are significantly above the regional average, at 97%, this compares with The Wye Valley AONB 2004 (82%), the Malvern Hills AONB 2000 (82%) and Herefordshire 2002 (91%) all very similar areas.



Public transport, i.e. train and local bus, was used by only 1% of all visitors. This figure is significantly lower than the regional average of 17%.

TABLE 6.1: MODE OF TRANSPORT – NEW / REPEAT		
	2005	1999
Car	97%	95%
Tour Coach	1%	2%
Train	1%	1%
Bicycle	1%	*
Bus/Coach Service	0%	1%

Use of the car has risen since the survey was last undertaken in 1999 from 95% to 97%. Use of the tour coach has fallen slightly by 1%.

6.01 Mode of Transport by New and Repeat Visitors

Repeat visitors to the Forest of Dean made use of a wider range of transport options, maybe due to their wider knowledge of the area, although for both new and repeat visitors, use of the car was dominant (95% new, 97% repeat).

TABLE 6.2: MODE OF TRANSPORT – NEW / REPEAT			
	OVERALL	NEW	REPEAT
Car	97%	95%	97%
Tour Coach	1%	1%	1%
Train	1%	1%	1%
Bicycle	1%	0%	1%
Bus/Coach Service	0%	1%	*

TABLE 6.3: MODE OF TRANSPORT BY MARKET SEGMENT					
	OVERALL	UK DAY	UK TOURING	OVERNIGHT UK	OVERSEAS
Car	97%	97%	95%	98%	89%
Tour Coach	1%	1%	1%	0%	4%
Train	1%	0%	1%	1%	4%
Bicycle	1%	1%	*	0%	0%
Bus/Coach Service	0%	1%	*	0%	0%

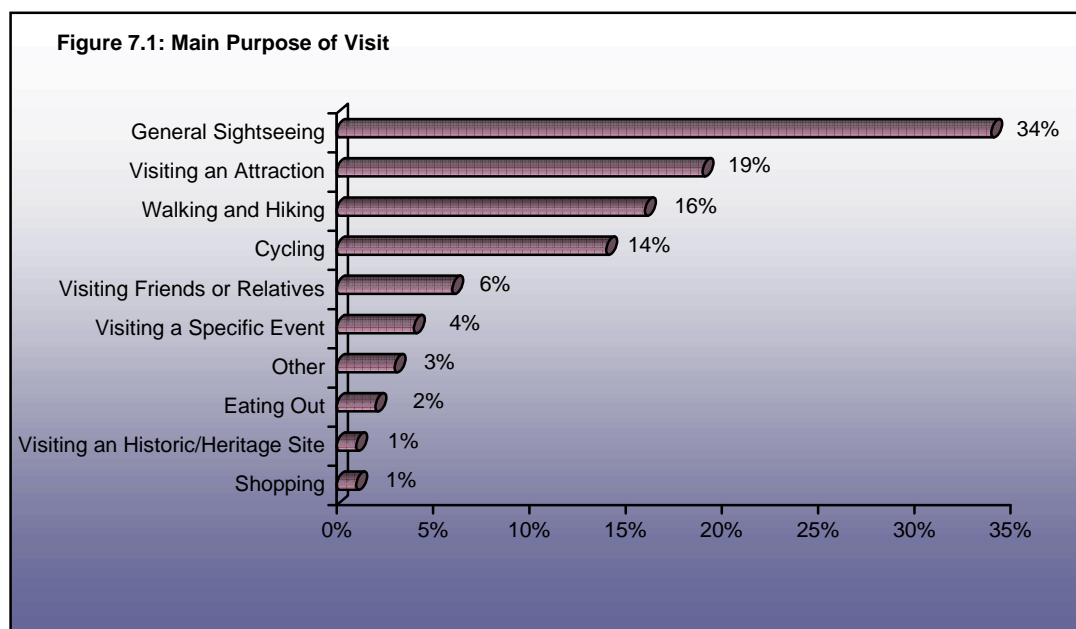
The table above indicates the variation in mode of transport across the market segments. For example, 98% of UK overnight visitors arrived by car, falling to 89% of overseas visitors.

Overseas visitors also made significantly more use of tour coaches (4%) than any other market segment. *(Please note that the overseas sample is low (28no) and results should be treated with caution).*

7.0 MAIN PURPOSE OF VISITING THE FOREST OF DEAN

7.01 MAIN PURPOSE

Respondents were shown a 'show card' listing a range of activities and asked to indicate what had been the main purpose of their visit to the Forest of Dean area.



Those who had attended an event or a festival (4%) were asked to specify which event/festival they had been to. Almost half (47%) had been to the 1940's weekend held at the Dean Forest Railway and almost half (47%) stated the World War II re-enactment. The other event mentioned was the Model Aircraft Show held at the Forest Model Village.

General sightseeing was the main reason for visiting the Forest of Dean for just over a third (34%) of respondents. On a similar theme, visiting a specific attraction was cited by almost a fifth (19%).

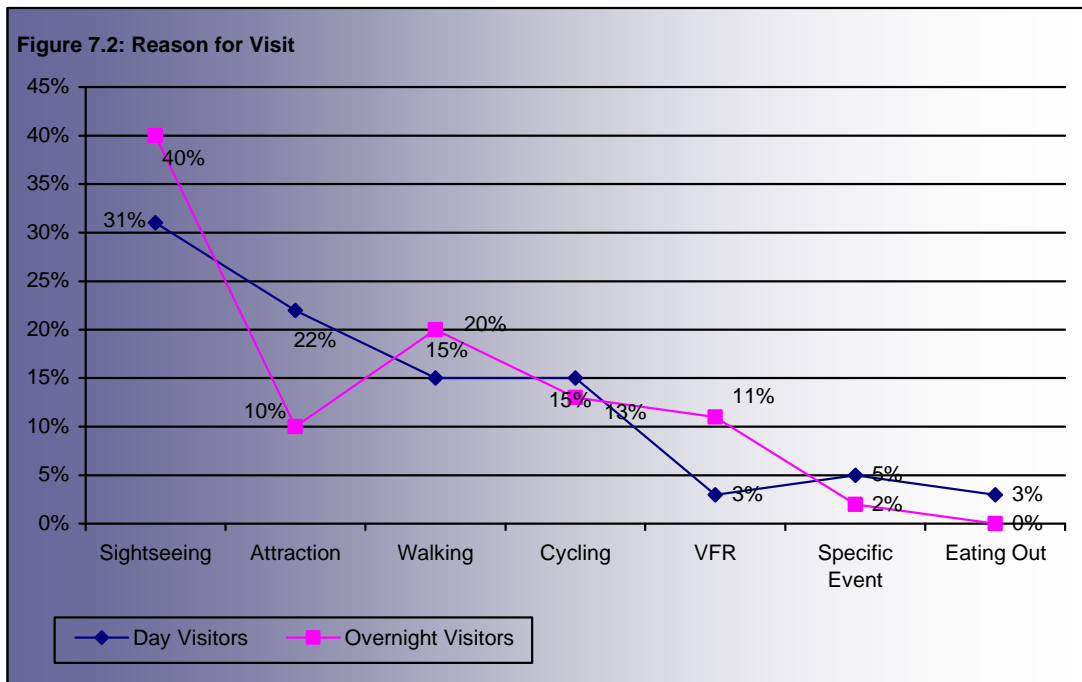
In keeping with the rural nature of the Forest of Dean a high proportion (16%) of visitors had come to enjoy the walking and hiking followed by a further 14% who were cycling.

'Other' activities cited included picnicking, taking the children out, needed something to do and for some quiet time.

7.02 Main Purpose of Visit by Market Segment

The table below indicates the main motivations by the various market segments in making a visit to the Forest of Dean, with domestic visitors undertaking a wider range of activities compared to overseas visitors.

TABLE 7.1: MAIN PURPOSE OF VISIT BY MARKET SEGMENT					
	Overall	UK Day	UK Overnight	UK Touring	Overseas
General Sightseeing	34%	20%	39%	51%	39%
Visiting an Attraction	19%	27%	11%	17%	11%
Walking and Hiking	16%	16%	20%	12%	11%
Cycling	14%	17%	13%	13%	7%
Visiting Friends or Relatives	6%	4%	10%	1%	14%
Visiting a Specific Event	3%	5%	2%	3%	4%
Other	3%	4%	3%	1%	4%
Eating Out	2%	5%	*	1%	*
Visiting an Historic/Heritage Site	1%	1%	1%	2%	11%
Shopping	1%	1%	0%	1%	*



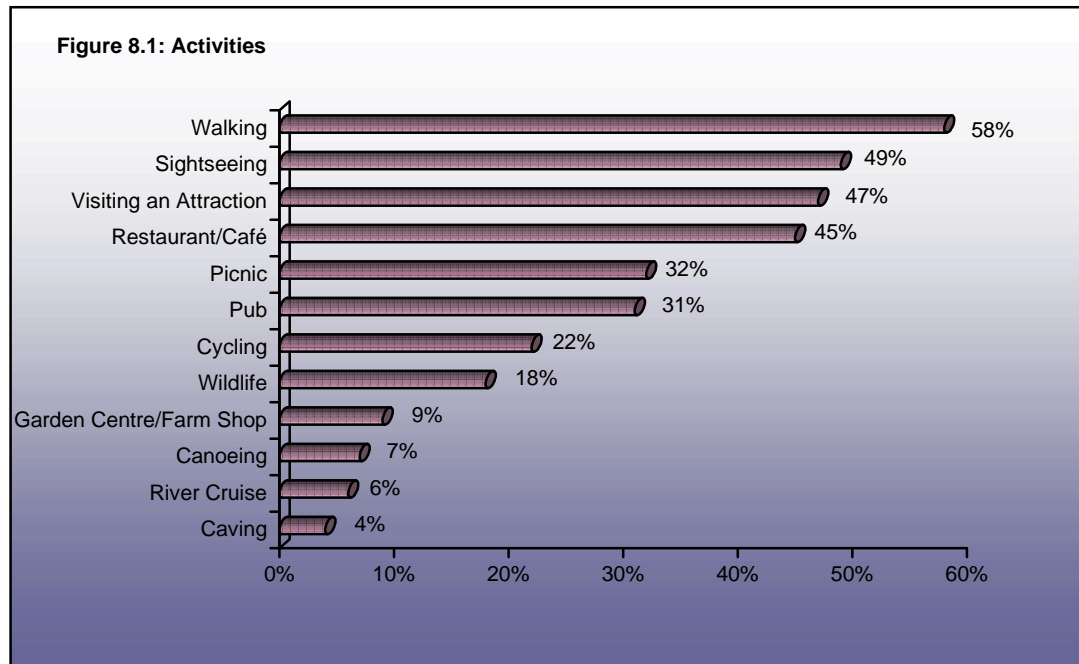
All market segments showed a high propensity for 'general sightseeing in the area (between 20% and 51% of each market) and visiting an attraction (between 11% and 27% of each market). Walking or hiking was cited by a fifth (20%) of overnight domestic visitors.

When analysing the motivations of new and repeat visitors variations were seen in general sightseeing (49% new, 27% repeat) and in visiting attractions. Repeat visitors (21%) who were most likely visiting the Forest of Dean for the purpose of visiting an attraction than new visitors (15%).

8.0 ACTIVITIES UNDERTAKEN IN FOREST OF DEAN

8.01 Activities Undertaken

Respondents were shown a 'show card' listing a range of activities and asked to indicate all of which they had been involved in whilst on their visit to the Forest of Dean.



Walking and hiking was the most popular activity undertaken by people visiting the Forest of Dean (58%) followed by sightseeing (49%) and visiting an attraction (47%). Visiting a restaurant or café was cited by 45% of those visiting the Forest of Dean.

The appeal of the tourism product within the Forest of Dean is clear to see in terms of activities undertaken by visitors, with rural, countryside and the open air activities appealing to many.

8.02 Variety of Activity by Market Segment

The table below indicates the activities undertaken by the various market segments.

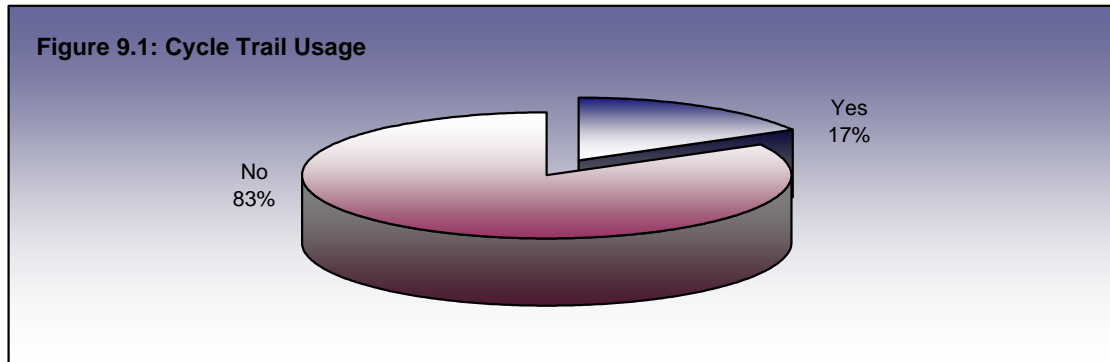
TABLE 8.1: ACTIVITY BY MARKET SEGMENT					
	Overall	UK Day	UK Overnight	UK Touring	Overseas
Walking and Hiking	58%	43%	80%	54%	68%
General Sightseeing	49%	33%	64%	56%	64%
Visiting an Attraction	47%	37%	58%	50%	50%
Restaurant/Cafe	45%	41%	50%	46%	43%
Picnic	32%	33%	30%	31%	32%
Pub	31%	17%	52%	25%	36%
Cycling	22%	22%	27%	17%	7%
Wildlife	18%	10%	28%	22%	11%
Farm Shop/Garden Centre	9%	4%	12%	13%	4%
Canoeing	7%	2%	15%	4%	4%
River Cruise	6%	3%	10%	5%	7%
Caving	4%	2%	10%	2%	*

All market segments showed a high propensity for walking and hiking in the Forest of Dean (between 43% and 80% of each market) and general sightseeing (between 33% and 64% of each market).

In general, new visitors were more likely to engage in many of the listed activities than repeat visitors. This was especially the case for walking and hiking (57%) and general sightseeing (66%). Repeat visitors were more likely to partake in activities such as picnicking (33%) and cycling (24%).

9.0 CYCLE TRAILS IN THE FOREST OF DEAN

The cycle trails in the Forest of Dean are an important feature of the tourism product. With this in mind, visitors were asked whether they had used them on their trip to the Forest. Almost a fifth (17%) stated that they had used one of the designated trails.



Visitors who had been cycling were asked to rate the condition of the trails on a scale of 1-5 (1 being very poor and 5 being very good).

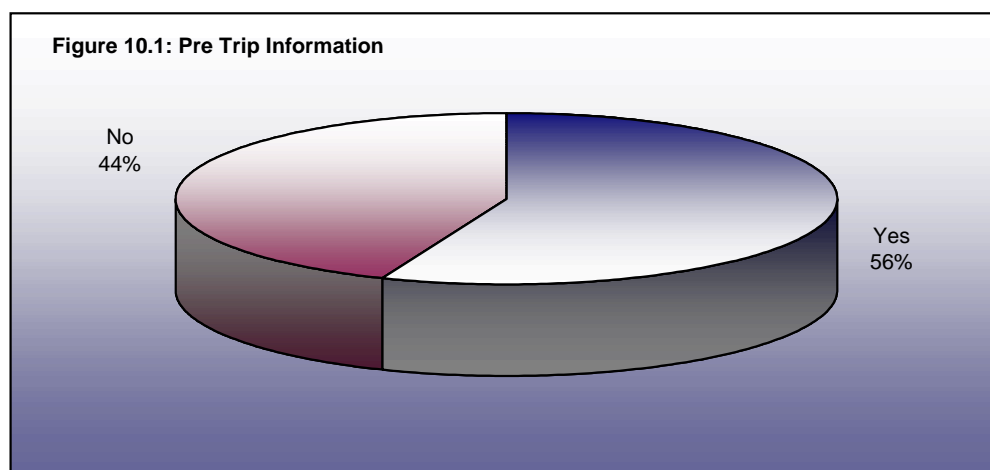
The average score given was 4.51 out of a possible 5, with three fifths (61%) rating the condition of the cycle trails as very good.

Repeat visitors were more likely to have used the designated cycle paths (19%) compared to new visitors (13%).

10.0 SOURCES OF INFORMATION

10.01 Pre-trip Information

Respondents were asked if, before arrival they had used any sources of information in planning their visit. Over half (56%) of respondents stated that they had used some form of information before arriving in the Forest of Dean, as illustrated in the graph below.

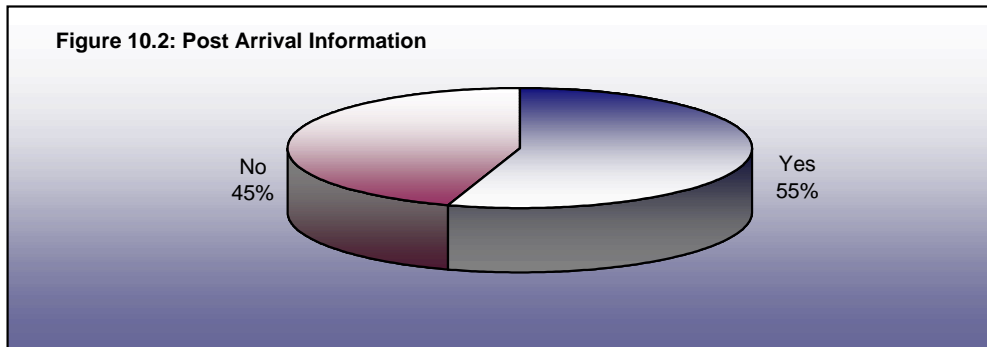


Use of pre-trip information is slightly higher in the Forest of Dean (56%) compared with the neighbouring Wye Valley AONB in 2004 (41%). However the use of pre trip information in the Forest of Dean was lower than in areas such as Worcestershire and Herefordshire. However, since 1999 pre trip information in the Forest of Dean has risen from 49% to 56%.

TABLE 10.1: COMPARISON OF PRE-TRIP INFORMATION USE		
	Yes	No
FOREST OF DEAN 2005	56%	44%
Forest of Dean 1999	49%	51%
Wye Valley AONB 2004	41%	59%
Malvern Hills AONB 2000	43%	57%
Worcestershire (2002)	73%	26%
Herefordshire (2002)	72%	28%

10.02 Visit Influence

Respondents were asked if they had already used, or intended to use any sources of information once they had arrived in the Forest of Dean. Over half (55%) of respondents stated that they had used some form of information in order to plan their trip to the Forest of Dean.



Almost half (46%) of these visitors had used information/knowledge gleaned from a previous visit to the Forest of Dean followed by almost a third (32%) of visitors who had had a personal recommendation from a friend or relative. Tourism leaflets/brochures had been an influence for 18% of respondents.

10.3 Information Usage in the Forest of Dean

Two thirds (73%) of respondents stated they had or were intending to use some form of information whilst in the area.

Respondents were then asked to indicate the type of information used whilst on their visit to the Forest of Dean by choosing an option on a show card. The options and responses were as follows:

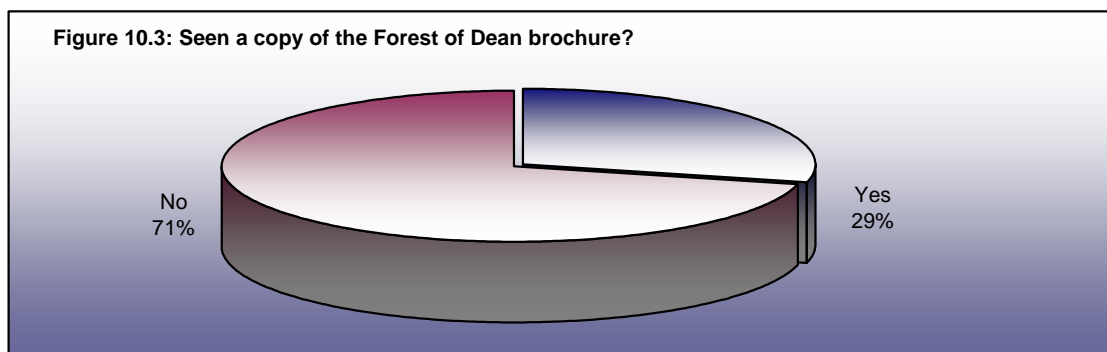
◇ Information Racks at Attractions	35%
◇ Walking Guides or Maps	28%
◇ Tourist Information Centre	22%
◇ Brochures and racks at accommodation	20%
◇ Tourist Information Boards	20%
◇ Tourist Information Points	11%
◇ Advice at Accommodation	9%

'Other' information was cited included advice at accommodation, the Internet and newspapers.

N.B Totals may add up to more than 100% due to multiple answers given.

10.04 The Forest of Dean Brochure 2005

Respondents were shown a copy of the Forest of Dean guide 2005 and asked whether they had seen a copy before their visit. Over a quarter (29%) stated that they had seen a copy.



As the table below shows new visitors (32%) were more likely to have seen a copy of the Forest of Dean brochure than repeat visitors (27%).

TABLE 10.2 SEEN A COPY OF THE FOREST OF DEAN BROCHURE		
	Yes	No
Overall	29%	71%
New Visitors	32%	68%
Repeat Visitors	27%	73%

Domestic overnight visitors (37%) were more likely to have seen a copy of the Forest of Dean brochure than day visitors (21%).

11.0 ATTRACTIONS IN THE FOREST OF DEAN AND LOCAL AREA

Respondents were asked which other local attractions they had visited or intended to visit as part of their trip to the Forest of Dean apart from where they were being interviewed. A varied degree of options were given and are listed in the table below.

TABLE 11.1: LOCAL ATTRACTIONS VISITED OR INTEND TO VISIT ON THIS TRIP			
	Attraction Visited	Attraction Intend to Visit	Rating
Cannop Ponds	6%	8%	4.20
Clearwell Caves	7%	18%	3.84
Dean Forest Railway	4%	18%	3.88
Dean Heritage Centre	3%	8%	4.21
Mallards Pike	3%	9%	4.33
The Model Village	1%	7%	4.27
Harts Barn Craft Centre	2%	5%	3.83
Mohair Centre	1%	4%	4.18
Puzzlewood	3%	22%	4.39
Sculpture Trail	7%	19%	4.40
Shambles Victorian Museum	5%	7%	4.21
Symonds Yat Rock	15%	24%	4.39
Taurus Crafts	4%	11%	3.81
Three Choirs Vineyard	0%	5%	4.14
Westbury Court Garden	1%	4%	4.67
Cycle Tracks	9%	9%	4.45
Perrygrove Railway	1%	5%	4.83

Symonds Yat Rock was the most visited attraction by visitors to the Forest of Dean (15%) and was the attraction that most visitors intended to visit on their trip (24%).

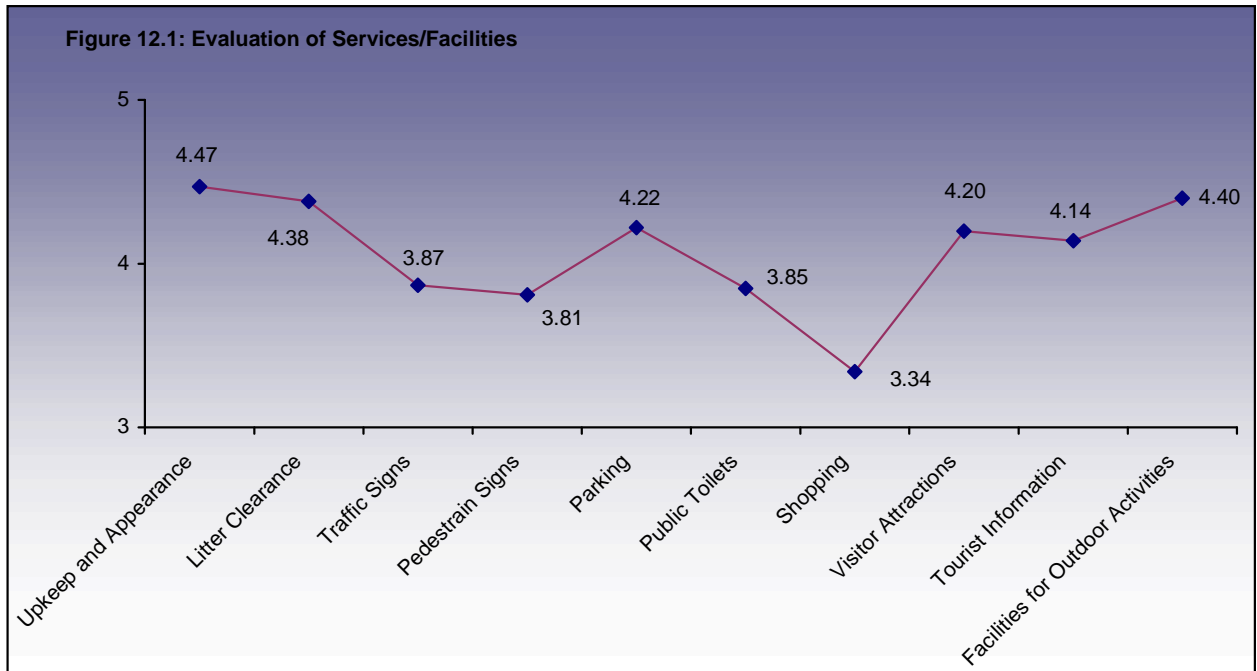
Perrygrove Railway achieved the highest rating out of a possible 5 at 4.83 for their visitor experience. Westbury Court Garden (4.67) and the cycle trails of the Forest of Dean (4.45) also scored highly.

12.0 SATISFACTION AND SUGGESTED IMPROVEMENTS

Evaluation of Visit

Respondents were asked to rate their satisfaction with a number of local services / facilities on a 1-5 scale (1 being very poor and 5 very good).

Overall ratings were positive for the Forest of Dean in every category.

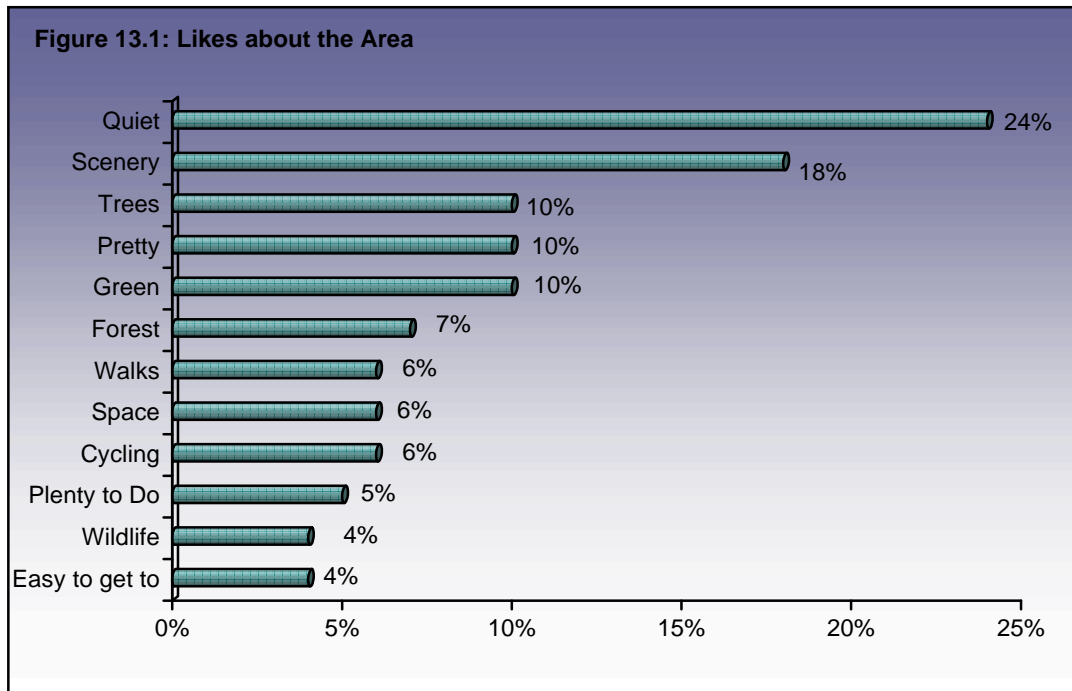


The highest scores given by visitors, were given for the upkeep and appearance of the Forest of Dean (4.47) followed by the facilities available for outdoor activities (4.40)

13.0 LIKES AND DISLIKES

13.01 What Visitors Like about the Forest of Dean

Respondents were asked what they particularly liked about the Forest of Dean area. No prompting or 'show card' was used.



The figure above highlights the most popular responses, with the quiet and peacefulness of the area, noted by just under a quarter (24%) of all respondents. Responses given were of a similar nature and followed certain themes; the scenery and views (18%), the variety of trees and vegetation (18%) and how pretty and beautiful the area is (10%).

The table overleaf shows the breakdown of responses by type of visitor. Each market sector cited the views and the scenery as a particular like about the Forest of Dean.

Overnight visitors were more likely to visit for the peacefulness of the area (30%) slightly more than day visitors (22%). However there was no particular distinction between day and overnight visitors when analysing what they liked about the area.

Almost a third (31%) of overseas visitors stated that the Forest of Dean had wonderful scenery and views and this is what they liked most about the area. This was followed by almost a fifth (19%) who liked the variety of trees and the vegetation and the green countryside respectively.

TABLE 13.1: LIKE ABOUT AREA BY TYPE OF VISITOR

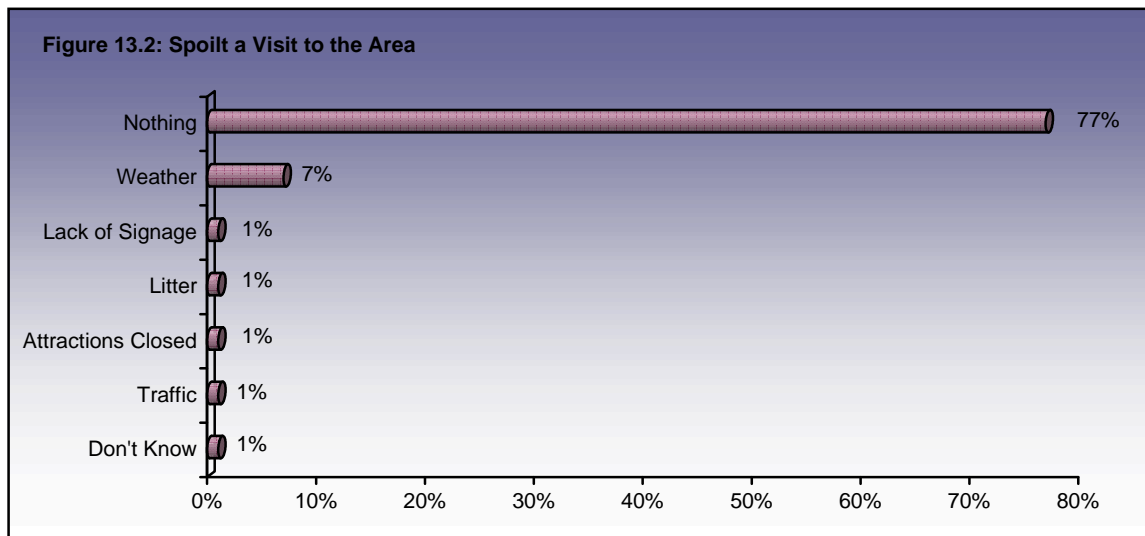
	Total	Day Visitor	Overnight UK	Touring UK	Overseas
Quiet & Peaceful	24%	22%	30%	23%	15%
Scenery & Views	18%	14%	18%	21%	31%
Variety of Trees	10%	12%	7%	11%	19%
Pretty & Beautiful	10%	10%	9%	13%	12%
Green Countryside	10%	9%	8%	12%	19%
Forest	7%	5%	9%	6%	4%
Walks	6%	8%	5%	5%	*
Space	6%	7%	6%	3%	12%

All other responses given follow similar patterns and include cycling, plenty to do, the wildlife, location, natural, clean and relaxing.

13.02 What Spoilt Visit to the Forest of Dean

Respondents were asked to identify anything which spoilt their visit to the Forest of Dean. Again, no prompts were used and, as such, responses were very diverse.

Encouragingly the majority (77%) of visitors stated that nothing had spoilt their visit to the Forest of Dean and a further 1% did not know. Of those respondents who gave an answer 7% stated that the weather had spoilt their visit. *Other reasons as to why a visit had been spoilt included lack of signage (1%), litter (1%), closed attractions (1%) and traffic (1%).*

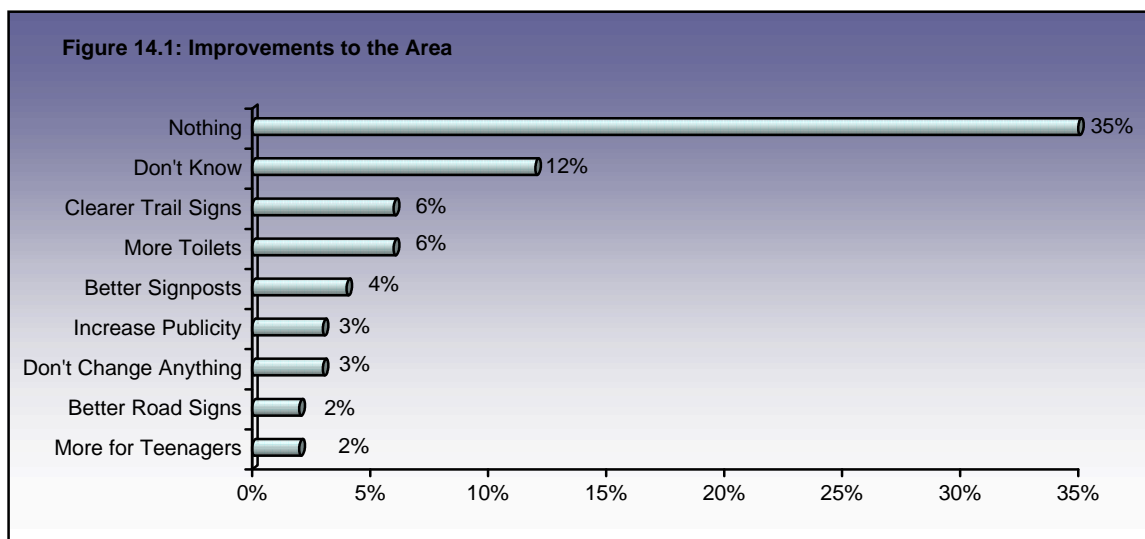


14.0 IMPROVEMENTS THAT COULD BE MADE TO THE FOREST OF DEAN

After specifying what they had liked and disliked about the Forest of Dean respondents were asked what could have been done to improve their visit. Encouragingly over a third (35%) said that nothing could have been done, followed by 12% who did not know.

Of those respondents who gave an answer 6% wanted to see clearer trail signs and 5% wanted more toilets available to visitors.

Better signposts were cited by 4% of visitors and an increase in publicity would have improved the visit for 3% of respondents.



Other responses given included 'don't change anything' (3%), better road signs (2%) and more to do for teenagers (2%).

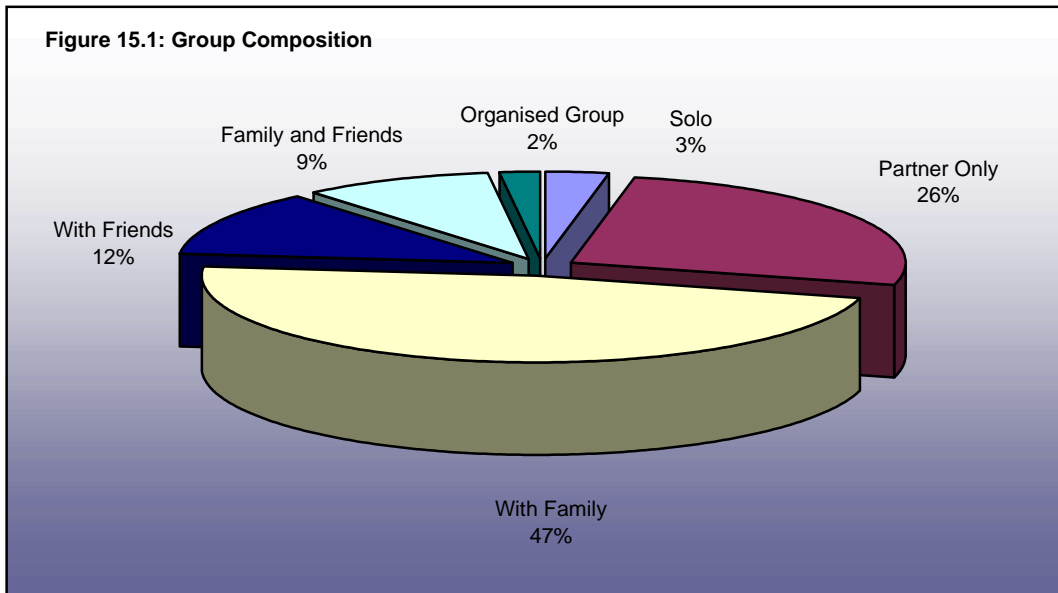
15.0 DEMOGRAPHIC PROFILE OF VISITORS

15.01 Gender of Respondent

Of the 669 people interviewed over half (54%) were female. This is comparable with the Wye Valley AONB Visitor Survey in 2004 where 55% of respondents interviewed were female.

15.02 The Sample

A total of 667 parties of visitors provided demographic data for their group. The average (mean) number of people per group was approximately 3.5, giving a total of 2,360 people included in the survey sample. The figures below indicate the type of group structure of visitors to the Forest of Dean.



Over two fifths (41%) of visitors were adults (Solo, with spouse/partner/with friends). Adult groups consisted mainly of couples (26%) with an average of 2.4 people per group, a total of 1,615 people.

Families represented 47% of all visitors. However, the label 'family' includes all visitor groups with at least one adult and one child under the age of 16. This category could therefore include school / youth groups as well as 'bona fide' family parties, although these are not distinguishable from the questionnaire survey.

The table overleaf shows the group structure of visitors to the Forest of Dean by type of visitor.

TABLE 15.1: GROUP STRUCTURE BY TYPE OF VISITOR

	Total	UK Day Visitor	Touring UK	Overnight UK	Overseas
Solo	3%	4%	1%	3%	14%
Partner Only	26%	24%	35%	23%	18%
With Family	47%	48%	39%	51%	43%
With Friends	12%	12%	10%	11%	21%
Family and Friends	9%	10%	9%	9%	4%
Organised Group	2%	1%	5%	2%	*

The table and graph indicate the demographic profile structure of all visitors surveyed. Almost two fifths (39%) of all visitors are over the age of 45 and a fifth (21%) are aged between 35 and 44. Conversely, only 7% of all visitors are aged 15-24.

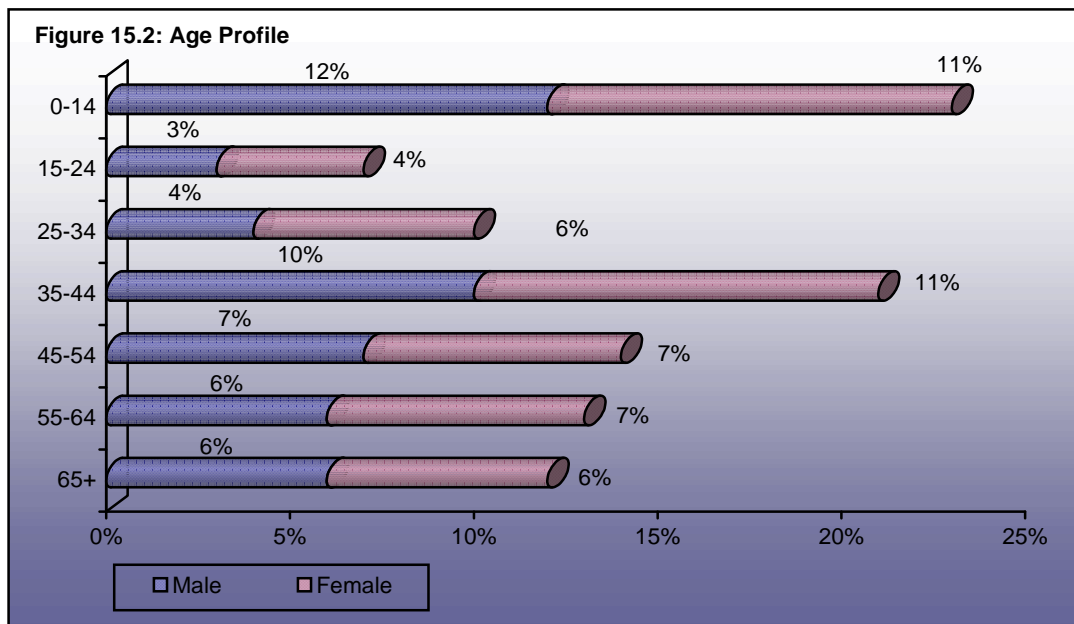
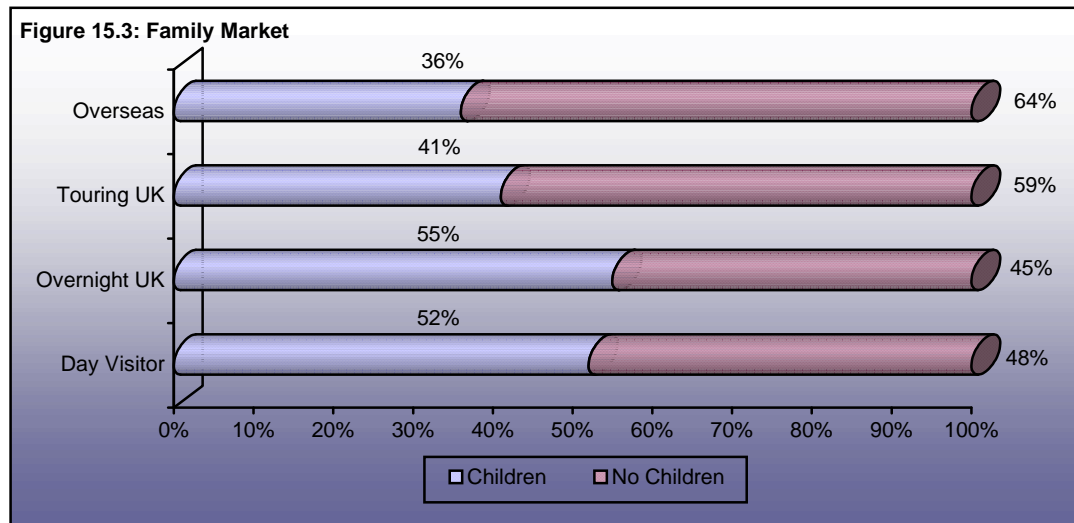


TABLE 15.2: DEMOGRAPHIC PROFILE – ALL GROUPS SURVEYED

	MALE	FEMALE	TOTAL
0-14	12%	11%	23%
15-24	3%	4%	7%
25-34	4%	6%	10%
35-44	10%	11%	21%
45-54	7%	7%	14%
55-64	6%	7%	13%
65+	6%	6%	12%
TOTAL	48%	52%	100%

15.03 The Family Market

As the survey was carried out over a six months, it included interviewing on weekends / weekdays, school holidays and in term time, there was no particular bias towards or against the presence of children.



Of all the groups surveyed, almost half (49%) contained children under 16 years of age. The remaining (51%) of parties did not contain children. The greatest proportion of groups with children can be seen amongst the UK overnight and day visitor markets (55% and 52% of groups respectively).

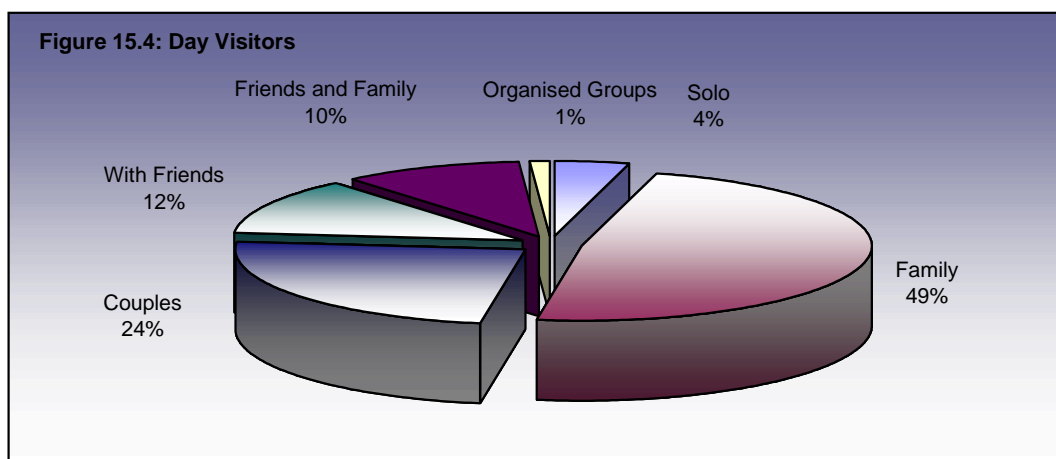
15.04 Adult Parties

Adult couples are most predominant in the domestic market representing 35% of touring visitors, 24% of day visitors and 23% of overnight visitors.

This analysis of group structure indicates that the Forest of Dean has a particularly high attraction for families.

15.05 UK Day Visitors

A total of 282 groups of day visitors provided demographic data for analysis. The total number of people in these groups was 923, giving an average (mean) of 3.3 people per group.



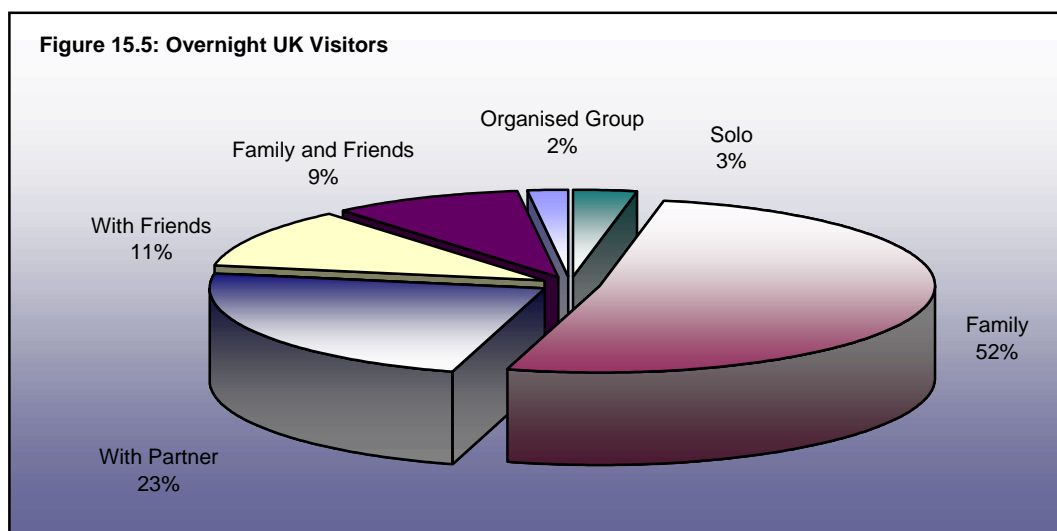
Almost half (49%) of **domestic day visitors** were visiting as part of a family group. Almost a quarter of day visitors (24%) were visiting with their partner or spouse.

The table below shows a breakdown of the age groups of the domestic day visitor market.

TABLE 15.3: DEMOGRAPHIC PROFILE – UK DAY VISITORS			
	MALE	FEMALE	TOTAL
0-9	10%	9%	19%
10-14	4%	3%	7%
15-18	2%	2%	4%
19-24	1%	2%	3%
25-34	4%	7%	11%
35-44	8%	10%	18%
45-54	7%	5%	12%
55-64	5%	8%	13%
65+	7%	7%	14%
TOTAL	48%	53%	101%

15.06 Overnight UK Visitors

A total of 208 groups of overnight UK visitors provided demographic data for analysis. The total number of people in these groups was 815, giving an average (mean) of 3.9 people per group



Domestic overnight visitors were more likely to be travelling as part of a family group (52%) followed by almost a quarter of visitors (23%) who were travelling as part of a couple.

TABLE 15.4: DEMOGRAPHIC PROFILE – UK OVERNIGHT VISITORS			
	MALE	FEMALE	TOTAL
0-9	8%	9%	17%
10-14	5%	5%	10%
15-18	2%	2%	4%
19-24	2%	2%	4%
25-34	5%	7%	12%
35-44	10%	11%	21%
45-54	5%	7%	12%
55-64	6%	6%	12%
65+	4%	4%	8%
TOTAL	47%	53%	100%

15.07 UK Touring Visitors

A total of 150 groups of overnight UK visitors provided demographic data for analysis. The total number of people in these groups was 537, giving an average (mean) of 3.5 people per group

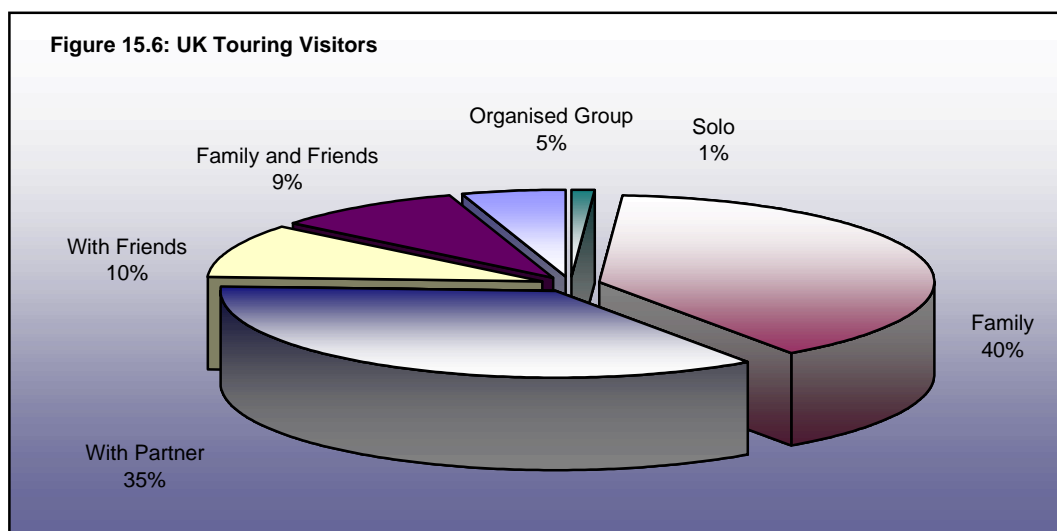
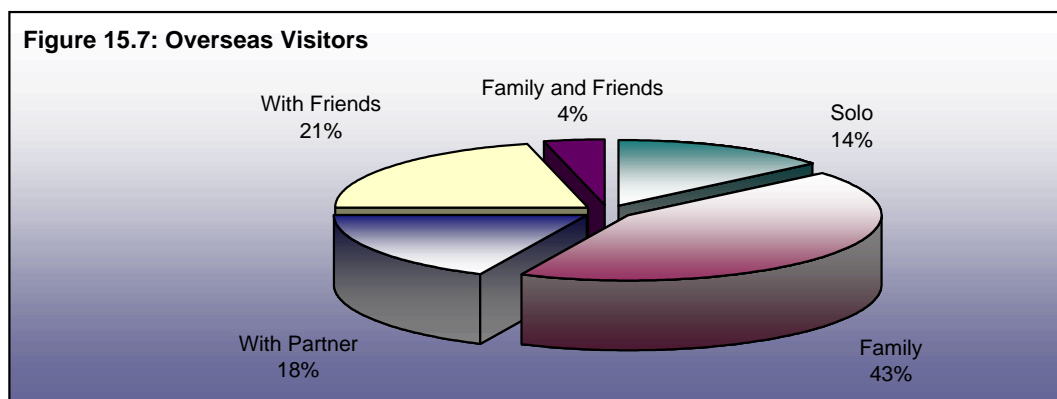


TABLE 15.5: DEMOGRAPHIC PROFILE – UK TOURING VISITORS			
	MALE	FEMALE	TOTAL
0-9	9%	8%	17%
10-14	4%	4%	8%
15-18	2%	2%	4%
19-24	1%	2%	3%
25-34	4%	6%	10%
35-44	10%	11%	21%
45-54	7%	7%	14%
55-64	6%	7%	13%
65+	5%	6%	11%
TOTAL	48%	53%	101%

15.08 Overseas Visitors

A total of 28 groups of overseas visitors provided demographic data for analysis. The total number of people in these groups was 85, giving an average (mean) of 3.0 people per group.



The largest proportion (43%) of respondents was visiting the Forest of Dean with their families followed by just under quarter (21%) who were visiting with friends.

TABLE 15.6: DEMOGRAPHIC PROFILE – OVERSEAS VISITORS			
	MALE	FEMALE	TOTAL
0-9	7%	6%	13%
10-14	3%	1%	4%
15-18	1%	4%	5%
19-24	*	1%	1%
25-34	*	1%	1%
35-44	10%	9%	19%
45-54	10%	7%	17%
55-64	12%	13%	25%
65+	9%	7%	16%
TOTAL	52%	49%	101%

Overseas visitors tended to fall into the older age categories with over half (58%) being over the age of 45. Only 2% of overseas visitors were between the ages of 19 and 34.

16.0 EXPENDITURE

16.01 Visitor Spend in the Local Economy

Visitors were asked to estimate how much they and their party were likely to spend during the whole period of their stay in the Forest of Dean. This included expenditure incurred on behalf of others, i.e. friends/relatives, business colleagues. Given that visitors were being asked to recollect their expenditures and to forecast future spending the following figures should be treated as **estimates**. Studies using the diary method of keeping account of spending have shown that visitor's own estimates as used in the Forest of Dean survey are usually on the conservative side.

Visitors were asked to give a breakdown of their total expenditure according to the following categories:

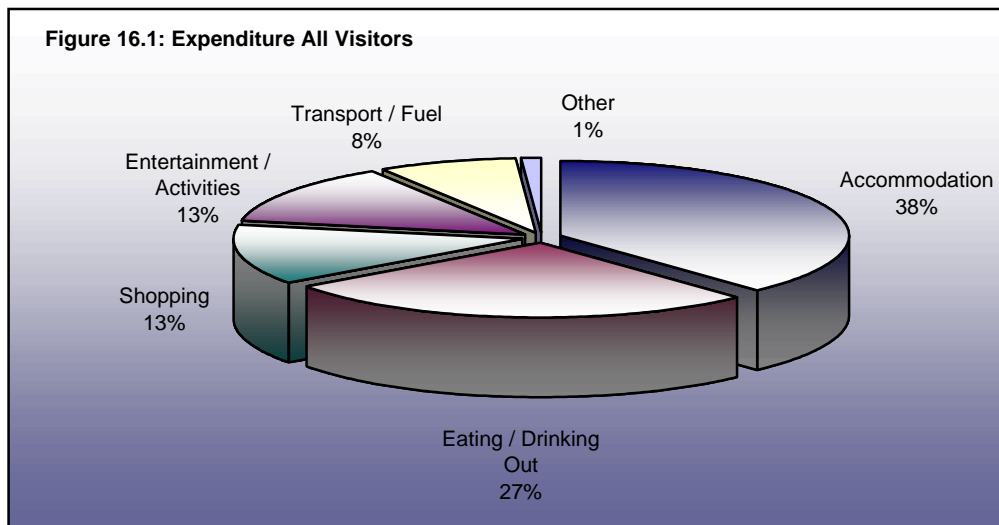
- * Accommodation
- * Eating/drinking out
- * Shopping for food
- * Shopping other goods
- * Entertainment
- * Transport/fuel
- * Other

The information on visitor expenditure in the local economy can be used as an indicator of the economic impact of all the visitors.

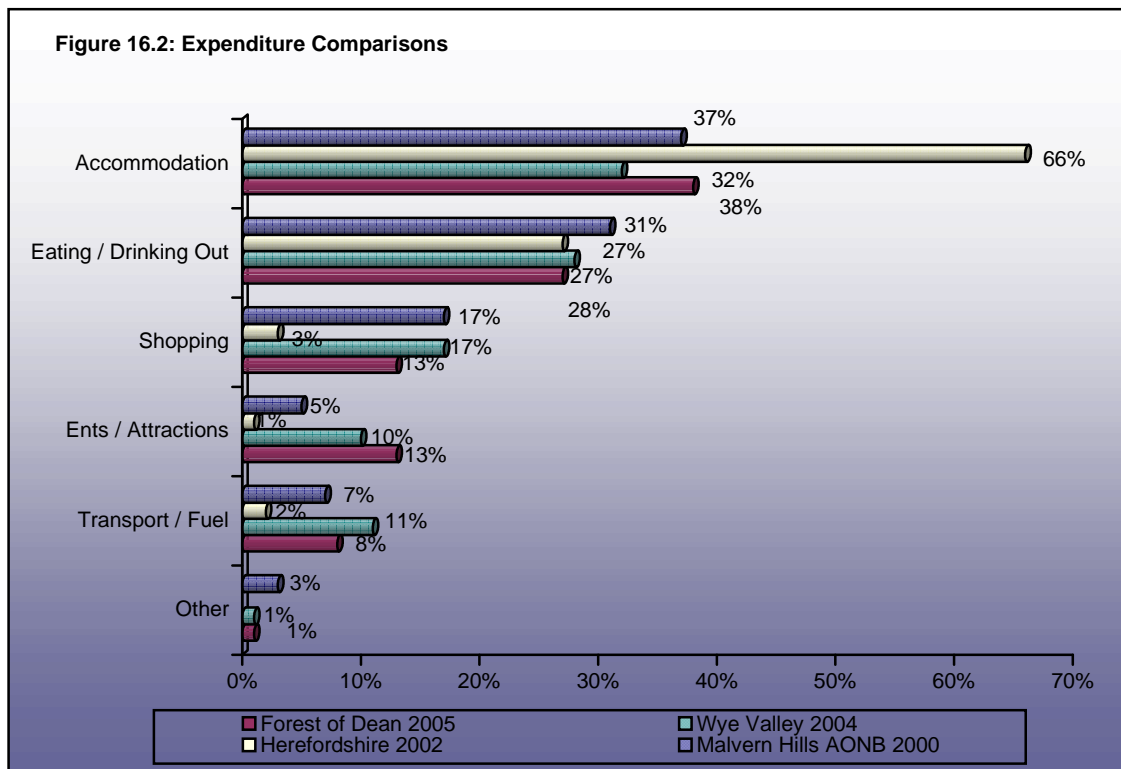
Overall visitors to the Forest of Dean spent on average £155.70 per group per trip, with 3.5 people per group this is £44.49 per person per trip.

Accommodation	38%
Eating/drinking out	27%
Shopping	13%
Entertainment	13%
Transport/fuel	8%
Other	1%

In comparison with the Wye Valley AONB 2004 results indicate a proportionately higher spend on accommodation (38% compared with 32%) but slightly lower for eating and drinking (27% compared with 28%) in the Forest of Dean.



The graph below charts the amounts spent in each category by different areas over the past few years. It clearly shows that visitors to Herefordshire 2002 (66%) spent the large majority of their money on accommodation followed by the Forest of Dean 2005 (38%) and that all other areas had similar patterns of spend.



The following analysis illustrates each market segment's proportions and levels of expenditure.

16.02 Day Visitors Expenditure

On average, a party of day visitors in the Forest of Dean spent £31.82. With an average party size of 3.3, the average expenditure rate per person, per day is £9.64.

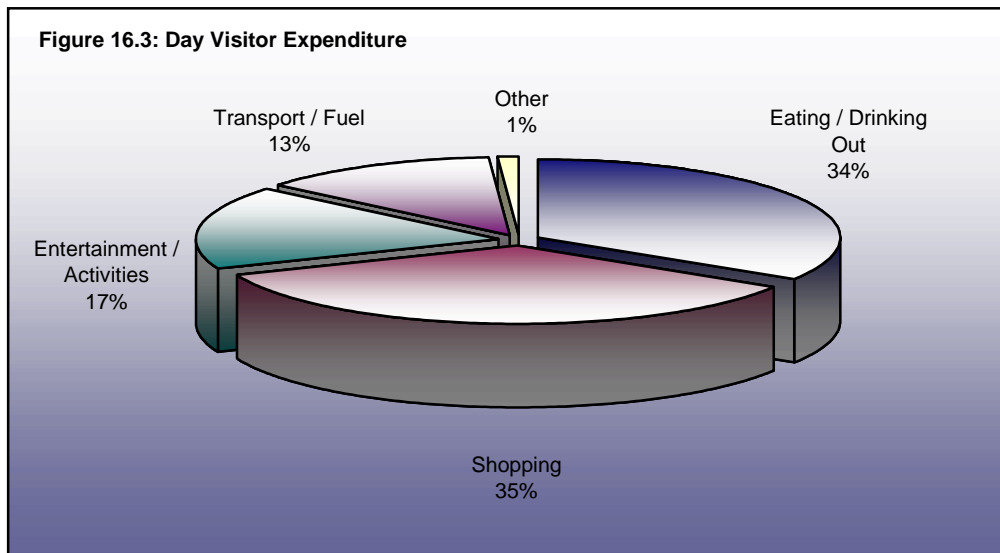


TABLE 16.2: EXPENDITURE BREAKDOWN – DAY VISITORS	
Eating/drinking out	34%
Shopping	35%
Entertainment	17%
Transport/fuel	13%
Other	1%

The 2002 UK Leisure Day Visits Survey shows an average expenditure per person for all types of day trip. For day trips to the countryside, the average spend per head is £8.60. The level of spend across the Forest of Dean is above this national average figure, perhaps reflecting the diverse nature of the area.

16.03 UK Overnight Visitors Expenditure

The estimated spend for all UK overnight visitors is calculated to be £358.45 per party. An average trip lasted 4.0 nights and the average group consisted of 3.9 people. Spend per person for UK overnight visitors to the Forest of Dean is therefore £91.91 per trip with an average spend per person per night of £22.98.

In the serviced accommodation sector, the average stay was 2.6 nights, with an average party size of 3.0 people. Total party spend per trip was £335.70, or £111.90 per person per trip and £43.04 per night.

In the commercial self-catering sector, the average stay was 6.0 nights and the average party size 4.5 people. Total party spend per trip was £782.60 or £173.91 per person per trip or £28.99 per night.

For those visitors using caravan / camping accommodation, the average length of stay was 3.7 nights and the average party size 4.1 people. Total party spend was £236 or £57.56 per person per trip and £15.56 per night.

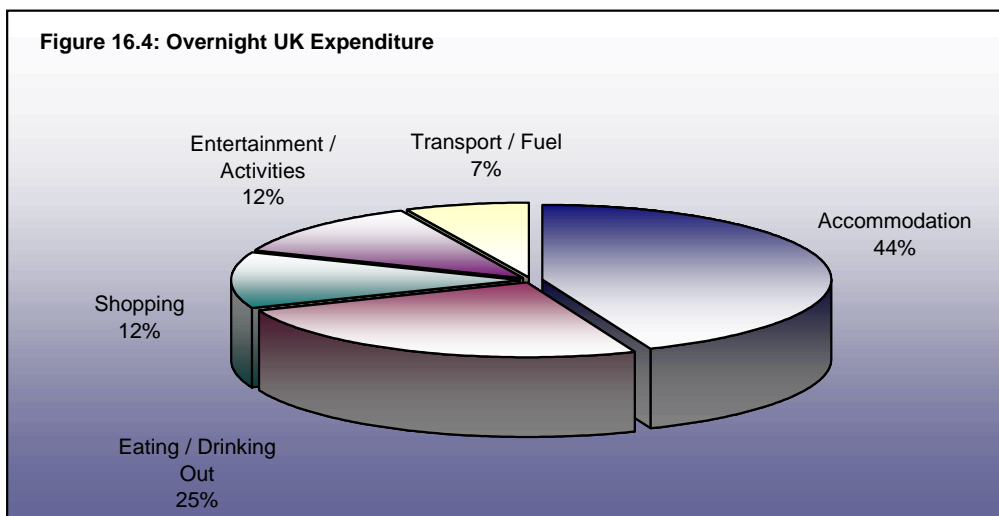


TABLE 16.3: EXPENDITURE BREAKDOWN – OVERNIGHT UK VISITORS

Accommodation	44%
Eating/drinking out	25%
Shopping	12%
Entertainment	12%
Transport/fuel	7%

16.04 Overseas Visitors Expenditure

On average, a party of overseas visitors in the Forest of Dean spent £90.60. With an average party size of 3.0, the average expenditure rate per person, per day is £30.20.

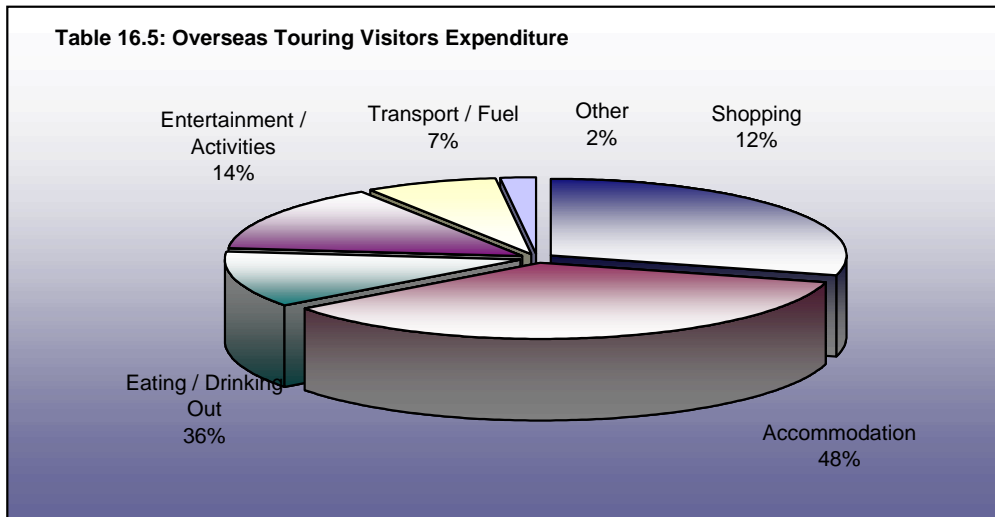


TABLE 16.4: EXPENDITURE BREAKDOWN – OVERSEAS DAY/TOURING VISITORS

Accommodation	48%
Eating/drinking out	36%
Shopping	12%
Entertainment	14%
Transport/fuel	7%
Other	2%

16.05 Expenditure by Market Segment

In summary, the differing levels of spend per market segment are:

TABLE 16.5: AVERAGE EXPENDITURE – PER PERSON	
UK Day Visitor	£9.64 Per Day
Overnight Visitors – UK & Overseas	£21.50 Per Night
UK Overnight – All	£22.98 Per Night
UK Overnight – serviced	£43.04 Per Night
UK Overnight – self-catering	£28.99 Per Night
UK Overnight – caravan / camping	£15.56 Per Night
Overseas Visitors	£30.20 Per Night