

Knowing Your Customer

The Joys of Statistics and Visitor Monitoring

2006 Seminar Proceedings
of the
Countryside Recreation Network

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Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

WELCOME AND INTRODUCTION

Wendy Thompson
Senior Specialist, Outdoor Recreation
Natural England

A good understanding of customers is essential to any business and no less the business of providing a good outdoor recreation experience. If we know our customers we are better placed to meet their needs and more able to attract new audiences through more effective promotion and more helpful information. We are also more able to demonstrate to funders and policy makers the value of the outdoors to the economy and to health, well-being and quality of life.

This seminar is about exploring the types of surveys that can be used to provide this essential information. Our speakers will talk about a variety of visitor monitoring from national household surveys to local site based interviews. They will consider the range of information that can be collected, whether this be about behaviour and activity or about perceptions and attitudes. I believe they will also provide some insight into the pitfalls and shortfalls; where the surveys were effective in achieving what they set out to do – and where they perhaps missed the mark.

The value of collecting data to measure trends and the sort of problems likely to be encountered will also be explored. Whilst consistency between surveys is important to ensure comparability over time, it may also be necessary to alter questions and methods to reflect new issues, changes in technology and changes in how the public respond to questionnaires. A perfect survey is unlikely to exist – and when the aim is to monitor trends over time, achieving perfection is an even bigger challenge!

I am delighted to welcome you to this event today and hope that you will go away feeling inspired to collect information to understand your customers and armed with practical ideas about the type of survey which would best match your needs and also your budget.

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

OVERVIEW OF ASSESSING NATIONAL AND REGIONAL SURVEYS

Professor Nigel Curry
Associate Dean
University of the West of England

1. Introduction

This presentation will:

- provide a brief historical review of national and regional countryside recreation surveys (section 2);
- present some data from the 2005 England Leisure Visits Survey (sections 3, 4 and 5);
- look more closely at the *interpretation* of a series of data in relation to recreation consumption and demand and recreation production and supply (sections 6, 7, 8 and 9);
- note some likely directions for the future of countryside recreation demand and supply (section 10).

2. How surveys have evolved

National surveys that have included information about countryside recreation were first conducted for Britain through the British Travel/University of Keele survey of 1965 (Rogers, 1968). Sillitoe (1969) collected similar information in 1966 but for England and Wales only. Young and Willmot (1973) undertook relevant household surveys, but only across 9 London Boroughs.

From 1973, questions on countryside recreation were contained in the General Household Survey, triennially for Great Britain and from 1977 the National Surveys of Countryside Recreation (NSCR) were conducted on four separate occasions to 1990, led by the (then) Countryside Commission (Curry, 1994). The (then) Central Statistical Office began the United Kingdom Leisure Day Visits Survey in 1985, which took over from the NSCR as the principal national data source for countryside recreation during the 1990s, when data were collected in 1992, 1994, 1996 and 1998 (Curry and Ravenscroft, 2001). By 2002/03, this had become the England Day Visits Survey, and by 2005, the England *Leisure Visits Survey*, co-funded by Natural England, Defra, the Environment Agency the Forestry Commission and the eight English national parks.

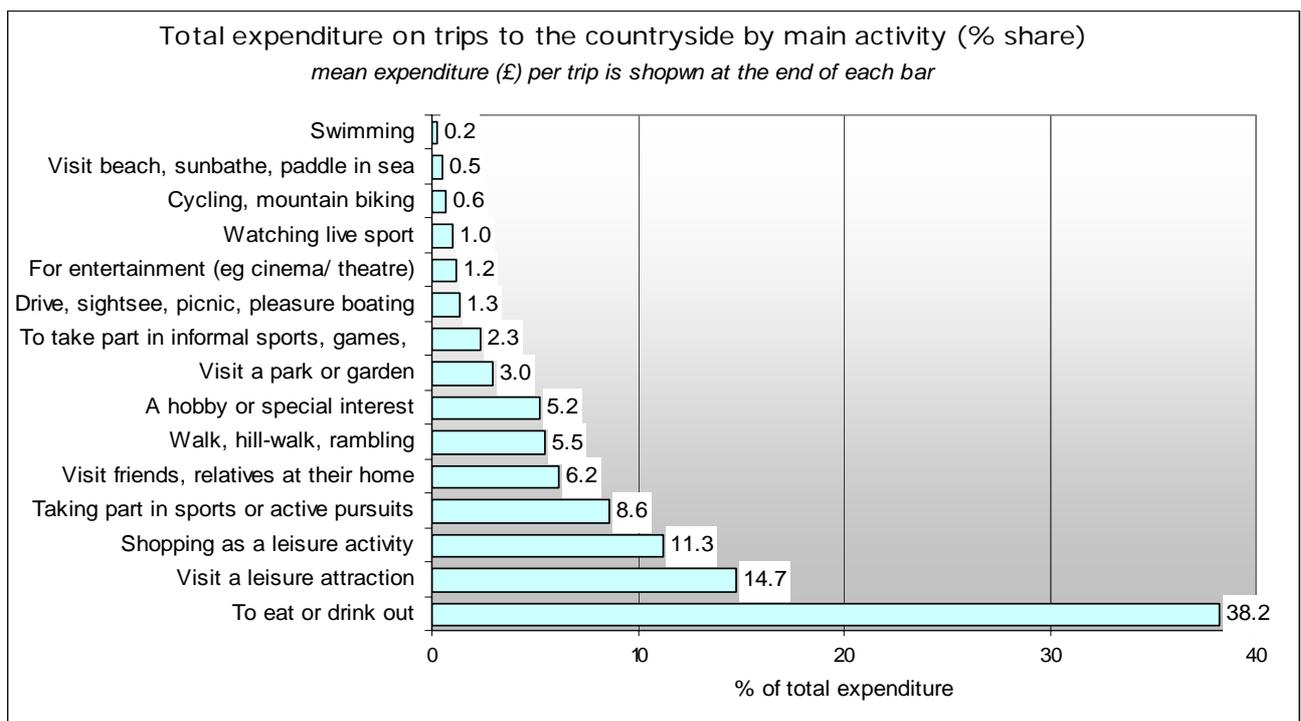
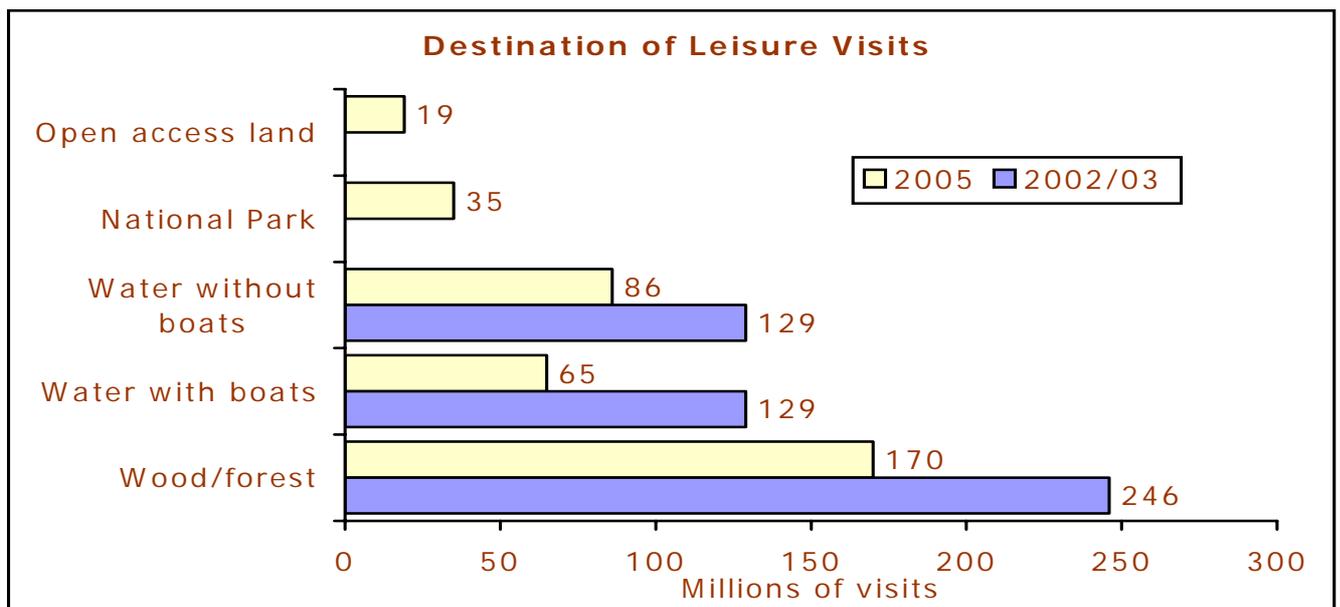
Changes in sample structures and sizes, and in definitions of countryside recreation, leisure, day visits and so on in these surveys, have limited comparisons between them.

3. Assessing national and regional surveys

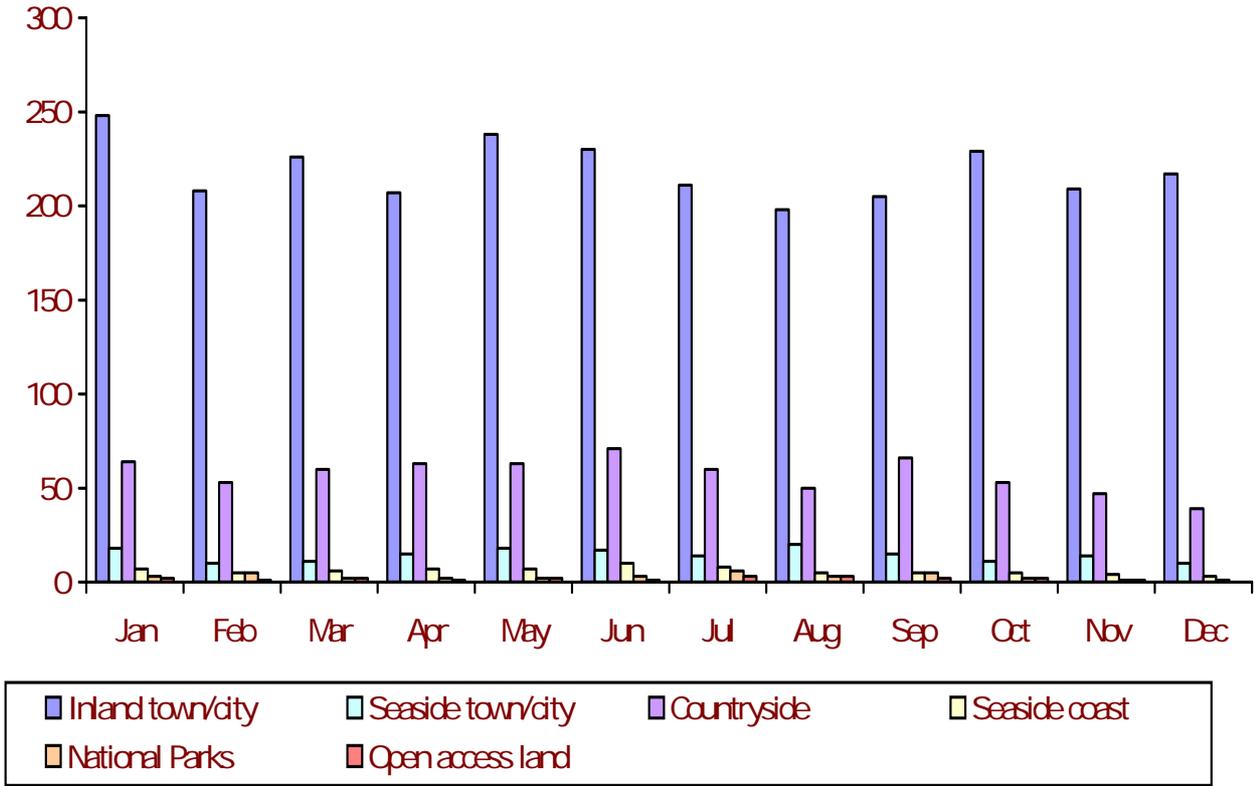
As with all surveys there are at least three ways of using them.

- The data: what do the statistics say?
- The analysis of the data: how can we manipulate these data in various ways to improve their explanatory powers?
- The interpretation of the data: what do the data mean in the context of recreation policy, planning and management?

4. Some data from the 2005 survey



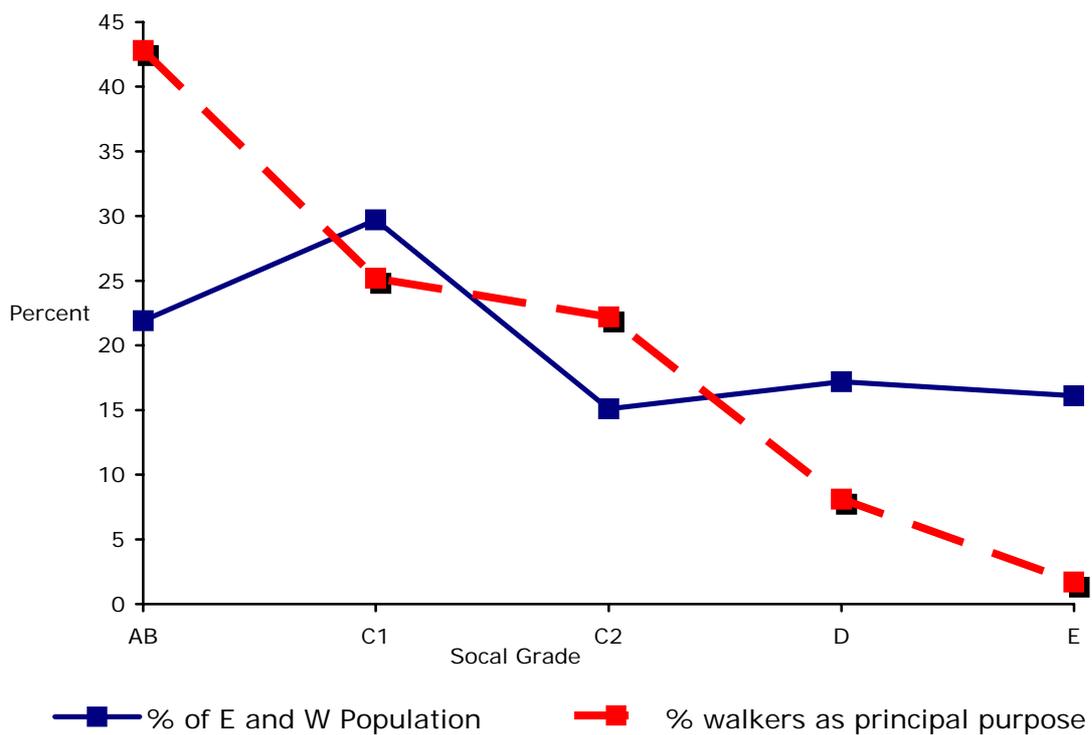
Destinations throughout the year 2005 (millions of visits)



5. Some analysis of the data

Social class compared to the population as a whole.

Trips to countryside by social class 2002/03

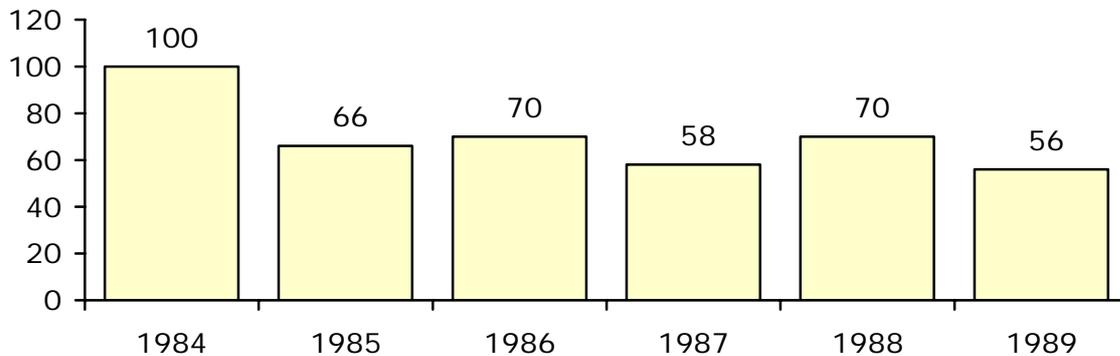


6. Interpreting countryside recreation consumption

The most overarching data about countryside recreation consumption is the total number of visits in any time period. Unfortunately, before the first data on national consumption patterns had been collected, Michael Dower (1965) had produced a very powerful polemic, the 'fourth wave' which anticipated the destruction of the very countryside that people had come to see, through sheer volume of numbers. This set in train over 35 years of what I have called 'planning on presumption' (Curry and Pack, 1993): planning for the recreation explosion. Most planning documents, both national and local planned defensively for this recreation growth. The view was prevalent even at the turn of the Millennium:

"The past 50 years have seen a steady growth in access to the countryside" (Countryside Agency, 2000, page 13).

This was unfortunate, because the data supports the opposite view. In normalising surveys during the 1980s as best as was possible, Broom (1991) noted the following pattern of overall countryside recreation trips over time.



More recently, using the National Surveys of Countryside Recreation, the House of Commons Environment Committee (1995) was able to conclude "with some surprise" that there had been no growth in countryside recreation trips at all since the surveys began in 1977. The successor UK Day Visits Survey (UKDVS) showed a decline in countryside visits from 1994 to 1998 (Curry and Ravenscroft, 2001) and the 2002/03 England Survey noted that "between 1998 and 2002/03, all day trips to the countryside declined by 12%" (page 4) (England Day Visits Survey, 2004). Fewer than 25% of all day visits was to the countryside. By the 2005 survey, the number of total leisure visits had fallen by a third and the proportion of these that were to the countryside had fallen to 20%. Total countryside visits had fallen by 45% (Research International, 2006).

These figures are a blunt instrument. Certainly, some localised areas may have experienced increasing visitor pressure, and 'natural' phenomena such as the weather, foot and mouth disease and the like have had significant cyclical impacts on consumption. Nevertheless, there is strong evidence to suggest that long term consumption is declining.

7. Countryside Recreation Demand

Again perhaps counter-intuitively, the reasons for this are largely to do with people's preferences rather than constraints. The UKDVS's for both 1996 and 1998 (Social and

Community Planning Research, 1999) show broadly similar results in this regard. Around 20% of non-visitors have no particular reason for non-participation, they simply have not gone. About 18% are too busy to go and 18% simply have no interest. Constraints to visiting generally have a less strong influence on non-participation: a lack of access to transport limits only 8% of non-visitors, and a lack of money, only 6%. The one exception to these constraints is health. Around 15% of non-participants are not well enough or sufficiently agile to use the countryside. Non-participation (with the exception of disability) therefore, cannot be influenced by supply-based recreation policies *per se*: it's more a question of changing attitudes and wealth.

What is causing a decline in countryside recreation consumption? Firstly, a range of 'intervening home-based leisure opportunities' (the wide screen television, digital satellite and DVD, the CD player, the computer and the internet) have created a huge increase in leisure choices. Secondly, as working lives have become increasingly busy, leisure time budgets have been divided into smaller 'bytes'. Outdoor leisure consumption has become shorter, more intensive, more specialised and, inevitably, more local (Lowe *et al* 1995).

Thirdly, Clark *et al*, (1994) suggest that the increases in *personal choice* noted in the UKDVS result from an information-based society, and fuel a market orientation in leisure consumption. Thus, people are attracted to things such as golf courses, sports facilities and holiday village resorts because of their status as well as their enjoyment. They provide *exclusivity*. This is exacerbated as different social groups express their identity through leisure activity, differently.

In these contexts, commoditised countryside recreation are less space extensive. The 'countryside' significance becomes incidental in the process of enjoyment. Activity becomes devoid of its social, cultural and landscape context, being replaced by its consumptive context (Mcnaughten and Urry 1998).

8. Countryside Recreation Production

At the same time as a number of cultural factors are leading to the commodification of countryside recreation, Government policy is reasserting older 'merit good' notions of 'quiet open air enjoyment' through public provision. During the 1990s, public policies for a range of agri-environment schemes, community woodland and national forest programmes, local authority planning and access agreements, Inland Revenue Heritage Tax exemptions and a number of community schemes such as Millennium Greens were estimated to have increased available area access by about 150,000 hectares and linear access by about 3,000 kilometres, an increase of about 5% in the national access estate, at an exchequer cost approaching £20 million (Curry, 2001). This was during a period when non-policy induced *de facto* 'quiet enjoyment' access was increasing considerably, possibly in an attempt to obviate a need for the access provisions in the Countryside and Rights of Way (CROW) Act, 2000 (Curry, 1998). The passing of the Act is set to more than double the available area access in England and Wales, through the introduction of 1.86 million hectares open country, and through the 'lost ways' completion of the Definitive Map, linear access is expected to increase considerably, too, over the next 20 years.

Here, there is a clear discordance between the consumptive characteristics of access to the countryside (declining in aggregate terms and becoming more market oriented) and the production side (significantly increasing state provision of 'free' goods). But why should this

be the case? Here again, it is important to understand the difference between production and supply (as it is with consumption and demand).

9. Countryside Recreation Supply

There are at least five supply side characteristics that lead to a sub-optimal public provision of countryside recreation.

Firstly, there is a public policy preoccupation with provision. Provision policies often are developed with little regard to what is wanted or what will maximise human satisfaction. For public recreation, supply-driven policies have had a certain logic. Increasing available recreation resources was a visible measure of 'success' for public agencies. There was also likely to be public concern over a perceived shortage of the recreation resource, whereas surpluses would be difficult to detect. Supply-led recreation policies, too, could be used for control: particular provision could be used to divert people from more sensitive parts of the countryside. Such was the underlying philosophy of country parks (Curry and Pack, 1993).

This supply-led approach is exemplified by the current Countryside Agency concern with 'dedicated' land under the CROW Act. It is felt that currently there is not 'enough' land being offered for dedication and so a scheme is being put in place to pay landholders to bring dedications onto the market. Research has taken place to determine the prices that will induce the 'right' amount of land into dedications. But given current access land surpluses, it is unclear what the 'right' amount of dedicated land might be, in respect of consumer interest.

Secondly, the 'public good' properties of leisure landscapes can lead to consumer preferences being ignored. The most common arguments for such provision are non-excludability and merit goods. But the resultant market failure does not mean that consumer preferences can simply be set aside, particularly when several authors have questioned the legitimacy of both non-excludability (Shoard, 1999) and merit goods (Coalter, 1998).

Thirdly, some assert that rights are more important than demands. The claim of citizen's rights over private property, the principle behind the statutory rights of way system, was prevalent in a welfarist Labour Government of post-war reconstruction (Parker and Ravenscroft, 2000) and also was the foundation for access to open country in the Countryside and Rights of Way Act, 2000. Yet rights can be apportioned whether anyone particularly want them or not.

Fourthly, many leisure policies are not really leisure policies. Access under agri-environment schemes is likely to increase under the RDPE because it is not the principal purpose of the policy to increase access, but to support farmers. The access increase is incidental. In a number of instances (in both agriculture and forestry), environmental policies have had recreation components tagged on to them to make the policy politically more attractive rather than to improve access provision *per se* (Curry, 2001).

This public preoccupation with rural leisure supply has led to an increasingly complex set of arrangements that are not intelligible to the public. They actually inhibit the ability to use leisure landscapes with certainty and confidence. A taxonomy is offered in figure 1 below.

Collective rights can be statutorily imposed, voluntarily offered, or traded through state economic mechanisms. Exclusionary rights can be created through state economic mechanisms or private markets. And 'privileges' operate outside of the rights system altogether (Mason, 1991). All of these kinds of access right can be apportioned for different time periods.

Figure 1 - A Taxonomy of Access Rights in England and Wales

Statutory Collective Rights in Perpetuity

The Rights of Way System
Open Country
Common Land
State Land Purchase for Recreation
Rights of Navigation

Voluntary Collective Rights in Perpetuity

Dedications under the CROW Act, 2000
Planning Agreements
Public Path Orders

State Economic Collective Rights for a Fixed Time Period

Paid Dedications
Leases to the State
Agri-environment agreements
Other written agreements

Citizenship Rights in Perpetuity

Millennium Greens
Town and Village Greens
Community Forests

State Economic Exclusionary Rights for a Fixed Time Period

Licenses and Permits from the State
User Charges to State Facilities

Private Market Exclusionary Rights

Market Provision (pay at the gate)
De Facto Access with Voluntary Payments
Access through Weekly or Annual Memberships

Privileges

De Facto Access with the Permission of the Landholder
Access by Tradition

10 Future Countryside Recreation

Government Policies

What seems to be happening with public policy is pretty much more of the same: increases in state-provided leisure facilities are proposed through the Rural Development Programme for England within the agri-environment schemes (Defra 2006a) and Natural England policies, for example, through paying for dedications are seeking to use market mechanisms to coerce more leisure land into the supply stock.

At the same time, there is a coercion in state driven consumption policies. The latest Defra consultation, *Outdoors for All?* (Defra, 2006b) seeks to 'encourage' young people, ethnic minorities and the disabled, to increase their consumption of rural leisure. There are clear targets here, to achieve measurable increases in: the awareness by under-represented groups of what the natural environment has to offer and where to go to enjoy it; the numbers of people in under-represented groups enjoying the natural environment.

There are problems with this, however.

- It is not clear how recreation policies can change the attitudes of these groups.
- There is research evidence from the introduction of Millennium Greens (Curry, 2001b) to suggest that young people prefer more gregarious activities such as skateboarding and bmx tracks, than consuming the 'natural environment'. When young people are introduced to leisure in the natural environment, their interest often is not sustained (Slee *et al*, 2001).
- There is a literature on the cultural significance of the English countryside for ethnic minorities (Milbourne, 1997) that suggests it has little significance for many and for some, it might even be emblematic of a colonial past.
- The 'merit good' motivation of this policy makes presumptions about what is good for people Coalter (1998).

Using the evidence base

National surveys (EDVS, 2004) and some recent county level studies (Curry and Ravenscroft, 2001) provide some insights into what people want in consuming 'public' leisure landscapes. These leisure patterns require distinct policy responses, but even without such responses, they are probably going to happen anyway.

In respect of provision

- Consumers wish to consume the countryside with certainty and confidence. Improving information and understanding about the leisure resource, and possibly even rationalising the resource itself is more important than increasing the available resource *per se*.
- The rights of way system remains the most popular form leisure landscape consumption for both outings and local use: it is most widely known and readily understood, *but*
- 'Commercial' leisure is becoming more popular as 'free' leisure is becoming less popular.

On the *consumption* side

- The countryside is consumed bi-modally. Firstly, the majority of trips take place regularly throughout the year and are very local to home and taken on foot. These consume *unassuming* countryside.
- Local leisure might appropriately be provided by the local state or community.
- Secondly, outings further afield tend to be relatively price inelastic and consume *high quality* landscapes such as the uplands.
- Outings offer the potential to be market-based to enhance rural incomes.
- There is an evidence base that legitimates improving access for the disabled.
- Many people *choose* not to consume the 'countryside', rather than are deprived of doing so. Particular groups have leisure preferences that are not orientated towards the countryside. The state might give some consideration to differentiated provision to cater for these types of preference.

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Countryside Recreation Network Seminar

**'KNOWING YOUR CUSTOMER
THE JOYS OF STATISTICS AND VISITOR MONITORING'**

**ASSESSING THE BUSINESS CASE NEEDS OF A COMBINED NATIONAL VISITOR
SURVEY IN WALES**

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Abstract

In January 2006 Forestry Commission Wales (FCW) and Countryside Council for Wales (CCW) commissioned TNS Travel & Tourism to develop a suitable methodology for a survey of outdoor recreation in Wales.

While a number of studies relating to outdoor recreation have been undertaken, no specific information has been gathered on the use of the outdoors for recreation in Wales. This study aimed to appraise the usefulness of existing sources of information regarding outdoor recreation in Wales, identify the current information needs of the public and voluntary sector and, on this basis, make recommendations for future surveying.

The initial stages of the study involved a workshop attended by the organisations most likely to use the results of an outdoor recreation survey and a programme of consultations with a wider group of stakeholders. An extensive literature review was also undertaken, including pertinent policy documents and research regarding outdoor recreation participation in Wales and further afield.

Having prioritised information requirements, TNS proposed the most appropriate method for a future survey of outdoor recreation in Wales and this approach was piloted in April 2006.

Background

Both Forestry Commission Wales (FCW) and the Countryside Council for Wales (CCW) are involved in the promotion of the country's natural resources for outdoor recreation. The importance of allowing 'everybody to experience and enjoy the countryside, wherever they live'¹ is recognised by both of these organisations, with a number of initiatives including Walking the Way to Health and Active Woods introduced to encourage enjoyment of the outdoors.

¹ <http://www.ccw.gov.uk/generalinfo/index.cfm?Subject=Access&lang=en>

One of FCW's key objectives, outlined in their corporate plan, is to see an increase in the use of the outdoors, particularly woodlands, for recreation, which is supported by a commitment to monitoring visitor numbers, profiles and experiences of the outdoors². Information on levels of participation in outdoor recreation and those taking part would be invaluable, not only to FCW and CCW but to a number of other organisations and bodies concerned with participation in outdoor recreation.

While there are a number of studies relating to this subject area no specific information has been gathered recently on the use of and users of the outdoors for recreation in Wales. Surveys investigating participation in sport, tourist visits, the use of managed woodlands and awareness of the Countryside Code, as well as studies into outdoor recreation in other countries within the UK, provide some helpful insights yet do not provide information directly relating to the use of the Welsh outdoors for recreation, particularly on non-tourism related visits. While the 2002-03 Great Britain Day Visits Survey included Wales within its coverage, data available from this survey is now becoming out dated.

It is on this basis that FCW and the CCW commissioned TNS Travel and Tourism in January 2006 to undertake a review of existing research and policy documents relating to outdoor recreation and to develop and pilot a suitable methodology for undertaking new research in this area.

The specific objectives of this study were as follows:

- To liaise with government agencies and propose a methodology for collecting the required information;
- To pilot this methodology with a representative sample of respondents across Wales;
- To provide a report of the findings of the pilot study;
- To provide a report detailing the proposed full survey methodology, an indication of costs, lessons learned and changes made at the pilot stage.

Approach to the study

Five separate but closely related strands of work were identified as necessary for the successful completion of this project, namely:

- A workshop with the client steering group;
- A programme of consultations;
- A review of relevant policy documents and existing research findings;

² [http://www.forestry.gov.uk/CorporatePlanEnglish.pdf/\\$File/CorporatePlanEnglish.pdf](http://www.forestry.gov.uk/CorporatePlanEnglish.pdf/$File/CorporatePlanEnglish.pdf)

- A presentation of the methodology that would achieve the survey requirements, as identified during the initial stages of the study and drawing upon the project team's experience and expertise;
- Piloting of the recommended method followed by a debrief to the client steering group and a presentation to relevant stakeholders.

The following sections summarise the main outcomes of these stages.

Identifying the needs of other organisations

As a starting point to this study, a workshop session was held to agree the scope of the study and to obtain the perspectives of the client group and other closely involved stakeholders. This half day session was facilitated by researchers from TNS Travel and Tourism and attended by representatives of FCW, CCW, Welsh Assembly Government (WAG) and Sports Council for Wales (SCW).

The second stage of this study was a series of consultations with other WAG representatives and a range of relevant public and voluntary sector organisations. Each consultation lasted around 30 minutes in duration and was conducted in person or by telephone by a senior TNS researcher. Discussions were based on a structured topic guide, developed in close consultation with the client steering group and taking account of the findings of the initial workshop. In total, 15 consultations were conducted.

A third element of this study which helped to inform the subsequent recommendations was a literature review of relevant public sector policy documents which included the following:

- 'Climbing Higher – a strategy for sport and physical activity' (WAG)
- 'Walking and Cycling Strategy for Wales' (WAG)
- Healthy and Active Lifestyles in Wales (WAG)
- 'Walk the Way to Health' (CCW)
- WAG Environment Strategy
- Woodlands for Wales 2001 & Progress report 2001-2005 (FCW on behalf of WAG)
- Better Woodlands for a Better Wales 2005/6-2007/8 (FCW)
- Working Together to Create a Better Wales (CCW's corporate strategy)
- 'Action Plan for the Countryside Experience' (report of the Working Party on Countryside Tourism in conjunction with Wales Tourist Board to WAG)

The WAG strategy for sport and physical activity from 2005 to 2025, Climbing Higher, was identified as particularly relevant to the requirements of a future survey of outdoor recreation in Wales. The targets within Climbing Higher which were identified as most

relevant to this study covered the areas of physical activity and the environment, as summarised below:

- An increase in the proportion of residents of Wales taking part in outdoor activities in the Welsh natural environment from 36% to 60%;
- A footpath or cycle path should be within a ten minute walk for 95% of the population;
- Every resident of Wales should have a green space no more than 300m (a six minute walk) from their home.

As part of this stage the methods used and results of the following surveys regarding recreation in Wales were also reviewed:

- *Great Britain Day Visits Survey 2002-03 Sports Council for Wales Participation in Sport Surveys*
- *Welsh Health Survey*
- *Living in Wales Survey*
- *National Travel Survey*
- *United Kingdom Tourism Survey*
- *Public Awareness of the Countryside Code 2005*
- *WAG All Forests Visitor Survey 2004*
- *Woodland Trust Wales Visitor Survey 2004*

While all of the above surveys were found to provide valuable information regarding recreation, sport, health and/or tourism in Wales, none collected the full range of information required by members of the client group and the public and voluntary sector consultees. Specific information 'gaps' sought by consultees but not available from any of the existing surveys included the following:

- Where outdoor recreation is undertaken in terms of specific locations, types of environment and distance from home.
- The specific types of outdoor recreation activities undertaken during visits to the outdoors.
- Methods of transport used to reach outdoor recreation destinations, including use of public transport.
- Motivations for participation in outdoor recreation and levels of satisfaction with places visited.
- Who participation is undertaken with.

- Propensity to participate in different types of outdoor recreation in the future and potential barriers to participation.

Information priorities

On the basis of the initial workshop session with the client group, subsequent programme of consultations and literature review, the priorities for a future outdoor recreation survey in Wales were identified. The following sections summarise the key recommendations made at this stage.

Who should be included?

In general the main concern for most consultees was be able to obtain a 'complete' picture of outdoor recreation undertaken by both residents of Wales and visitors to the country, either on day visits or trips involving an overnight stay. However, given the policy context and related targets, the top priority for many consultees was to measure participation amongst residents of Wales.

The literature review included the United Kingdom Tourism Survey (UKTS) which measures overnight visits taken in Wales by UK residents, including detailed information regarding places visited and activities undertaken. With around 100,000 interviews undertaken across the UK annually, details of between 1,000 and 1,500 overnight trips to Wales are recorded each year including information on places visited and activities undertaken.

Analysis of results of the Great Britain Day Visits Survey suggested that less than 1% of day trips taken by residents of England were to a destination in Wales. However, the 2004 All Forests Visitor Survey results suggested that as many as 18% of day trippers to FCW sites lived in England, mainly in the North West and South West regions.

As UKTS already collects detailed information on overnight visitors to Wales and will continue to do so for at least another 5 years, it was recommended that data on outdoor recreation amongst UK residents during overnight visits could be obtained from this source. Over a five year period, details of at least 5,000 trips will be collected and, of this total, it would be expected that around three-fifths would have undertaken outdoor activities, providing a sizeable base for detailed analysis.

On this basis it was recommended that the survey pilot should be undertaken amongst residents of Wales only. However, given the volume of cross-border day visitors to certain parts of Wales, the survey method recommended should allow for 'booster' sampling to be undertaken in agreed 'catchment' areas in England.

Defining outdoor recreation

In the consultations, most respondents were interested in the widest definition of outdoor recreation with no limitations in terms of the places where the recreation was undertaken or the duration of time spent away from home. These views were based upon perceptions that participation in, for example, dog walking in an environment close to the participant's

home provided as valuable health and social benefits as activities undertaken further away or for longer durations. Indeed, from a social inclusion point of view, such 'doorstep' activity was vital and reflected the objectives of policies such as Climbing Higher.

In terms of destinations visited, all consultees were as interested in recreation undertaken in an urban surrounding as more rural/ countryside locations. Again this view tended to be related to social inclusion targets and the desire to record recreation in urban green spaces amongst people who were less able to travel to the countryside due to a lack of transport, costs, etc.

Another variable discussed in relationship to the definition of outdoor recreation was the types of activities undertaken. For example, should activities such as golf or football be excluded because they are considered to be organised sports whilst other activities which might also be considered sport, such as mountain biking, are included?

The inclusion of motorised activities was also discussed in the consultations. In general, it was felt that activities such as moto-cross or jet skiing should not be counted as outdoor recreation for the purposes of the survey as they had fewer health benefits (a point not agreed upon by all respondents). However, it was also suggested that whilst more passive activities such as picnicking or sightseeing by car may have limited, if any, physical health benefits, they could provide mental health benefits through the visitor's exposure to the natural environment, rest and relaxation, etc. It was also suggested that people who only participated in passive activities may be more likely than those who do not participate at all to become participants in more active pursuits such as short walks and so it was important to record their presence.

On the basis of the above, it was recommended that the definition of outdoor recreation trips should have no time or distance limitations and that all types of destination should be included. This is the approach which was taken in the GBDVS and EDVS surveys in which all trips/outings taken for leisure purposes which did not involve a night away from home were recorded.

It was recommended that a similar approach was taken in a survey of outdoor recreation in Wales as doing so would satisfy the requirements of most of the consultees whilst providing a definition which was comparable with the Wales data collected through GBDVS and data collected in England by EDVS.

Survey geography

During the consultations, respondents were also asked to provide their views on the geographical areas survey outputs should be produced at both in terms of the places of origin of respondents and places visited.

In a large number of the consultations it was suggested that it would be most useful if outputs could be produced at a Local Authority level. However, with 22 Local Authorities in Wales and a minimum sample of at least several hundred interviews per area needed in each area to produce robust results, it was also agreed by some consultees that the financial cost of a survey of this size was unlikely to be feasible.

For most of the consultees, it was agreed that the division of Wales into between 4 and 6 regions would be adequate for most purposes. The exact boundaries of these areas varied

between organisations with suggestions of useful boundaries including the 4 Regional Tourism Partnerships, the 4 FCW forest districts and the 6 Wales Spatial Plan areas (North East, North West, Central, Pembrokeshire, South East, Swansea Bay).

It was recommended that the home postcodes of respondents should be recorded during the interview to allow subsequent analysis of the results by a variety of different types of area. In terms of destinations visited, as well as asking respondents to detail the type of destination (e.g. woodland or coast), it was recommended that details of the actual towns and villages visited should be recorded. This information could then be categorised according to a number of different types of area including those listed above and others such as National Park boundaries.

Survey timing

When asked about the seasonal coverage of the survey, all of the consultees indicated that it was important to measure participation in outdoor recreation over a full 12 months' period. This finding is reflective of the earlier discussion on the types of activity to be included and who the survey should include with informal 'doorstep' activity likely to be much less seasonal in nature than that undertaken by, for example, tourists.

Accordingly it was recommended that the survey fieldwork should be evenly spread over 12 months. Dependant on the final sample, this method would allow comparisons to be made between findings obtained at different times of year.

The subject of how often the Wales Recreation Survey should be undertaken was also discussed during the consultations. In general it was agreed that it was not necessary for the survey to be undertaken every year and that a period of 3 or 4 years between surveys would be acceptable. This level of frequency would reflect the periods specified for updating progress made towards the targets set by WAG, including those in Climbing Higher.

Information priorities

During the workshop and consultations the types of information to be collected by the survey and relative priorities were also discussed. While views on what should be asked varied somewhat between individuals, certain areas were seen as important amongst a majority of those spoken to while other areas were generally seen as less important or were only seen as important by a minority of consultees. The topics seen as most important to most respondents were as follows:

- Volume of trips taken;
- Activities undertaken;
- Frequency and intensity of activity;
- Duration of trips;
- Places visited;

- Place of residence;
- Mode of transport;
- Motivations for participation in outdoor recreation;
- Barriers to participation in outdoor recreation;
- Demographic/ classification information.

Implications of findings

The choice of survey method used in the pilot was based upon the information needs of the client group and their partners, as identified in the workshop, programme of consultations and review of literature.

The method of data collection recommended for the survey pilot was telephone interviewing using CATI technology (Computer Assisted Telephone Interviewing). Telephone surveying was selected as it permitted less geographical clustering of the sample than could be achieved with in-home surveying and would be a comparable approach to the major England Day Visits Survey (EDVS) and Sport England's Active People survey.

Other data collection methods were considered as alternatives but discounted as less suitable for a variety of reasons. Surveying at recreation sites was seen as unfeasible if a representative sample of all outdoor recreation participants (and non-participants) was to be obtained. Other methods considered but discounted included in-home surveying, which was considered to be less cost effective; on-line research, which could not be used to generate a truly representative sample, and the inclusion of questions on a consumer omnibus survey, an option which was ruled out due to the infrequency of the existing Welsh omnibus surveys.

A random probability sampling approach was recommended with households to be included in the survey selected using Random Digit Dialling (RDD) and the individual to be interviewed selected using the last birthday rule. To help maximise response rates and maintain the random nature of the sample, it was recommended that each telephone number should be called on a minimum of 5 occasions. To ensure that Welsh speaking respondents had an equal opportunity to participate in the survey, all respondents could be offered the option of undertaking the interview in Welsh.

Did it work?

The pilot survey was undertaken between 24th April 2006 and 9th May 2006. Some of the key results emerging from this pilot included

- Some 93% of respondents had taken an outdoor recreation visit during the previous 12 months and 77% had in the 7 days prior to the interview.

- In terms of the activities undertaken in the last 12 months, 81% of all respondents had walked for recreation, 50% had a picnic and 36% took part in wildlife watching.
- Amongst the children asked about, 87% had taken part in one or more of a list of outdoor recreation activities during the previous week. The highest participation activities amongst children were walking and running for 50 metres or more (65%) and informal games (63%).
- 4% of all outdoor recreation visits involved the use of a public/ scheduled bus and 1% involved the use of a train.
- During their most recent outdoor recreation visit, 73% were 'very satisfied' with their experience as a whole.

The recommended approach, CATI telephone interviews with a random sample of Welsh adults was largely successful in collecting the information which was identified as required. However, one of the main issues arising from the pilot was the lower than anticipated level of response. Possible ways that the number of refusals obtained could be decreased include a revision to the introductory text and a decrease in the total length of the interview from 20 minutes to no more than 15 minutes.

However using this survey approach, with a sample size of 4,000 it would be possible to track changes in overall participation across Wales of one percentage point per year by repeating the survey every three to four years (i.e. to measure a 3 to 4 point change over this longer period). With a sample of 6,000, regional variations of this scale could be measured on a similar basis if Wales was separated into four areas with similar sized target sample sizes.

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER
THE JOYS OF STATISTICS AND VISITOR MONITORING'

**THE ACTIVE PEOPLE SURVEY - EVIDENCE SUPPORTING IMPROVED STRATEGIC
PLANNING IN THE DELIVERY SYSTEM FOR SPORT**

Nick Rowe
Head of Research
Sport England

This is an excerpt from an electronic leaflet available at
http://www.sportengland.org/active_people_diagnostic_pdf.pdf

Access the full survey at
www.activepeoplesurvey.co.uk

Background to the Active People Survey

The Active People Survey is the largest ever survey of adults participation in sport and active recreation to be undertaken in England.

The survey was carried out by Ipsos MORI, on behalf of Sport England.

The survey started in October 2005, and was completed in October 2006 with 363,724 completed interviews.

It is the first time that a reliable and robust measurement of participation in sport and active recreation is available at a local level. The minimum number of interviews achieved for each local authority in England was 1,000. This will allow levels of analysis previously not possible.

The survey measures and informs progress on two key indicators: the percentage of adults participating in at least thirty minutes of moderate intensity sport and active recreation on three or more days in a week and; the proportion of the population that volunteer in sport for at least one hour per week. In addition, the survey also measures club membership, involvement in competition and receipt of tuition or coaching.

For a useful introductory guide to the survey:

http://www.sportengland.org/active_people_nov_2005.pdf

Accessing the full survey results – the Active People Diagnostic

The results from the Active People Survey are available via a sophisticated web-based reporting and analysis tool, 'Active People Diagnostic', which will enable users to access survey results by registering and logging onto the site.

The Diagnostic has been developed via consultation with key stakeholders. Workshops and online consultations were held to determine what the site should look like, how it should work and the desired levels of analysis.

The Diagnostic is designed to tailor reports to stakeholder requirements, for example key indicators can be viewed by local authority area, region, County Sport Partnership and Primary Care Trust area. National Governing Bodies of sport can also analyse sport-specific results. Results are reported by demographic subgroups, for example age, social class and ethnicity.

Users can view their survey results in tabular and graphical format, and export all tabular outputs to Microsoft Excel.

The provision of data around the Key Performance Indicators is just one element of the Diagnostic. It is an improvement tool that will enable users to analyse their data and get a picture of their areas' participation. This will aid the identification of strengths and weaknesses and the evaluation of future priorities.

Levels of analysis within the Diagnostic

The Diagnostic will have up to four tiers of analysis.

- **Tier 1 – Key Performance Indicators**

This tier shows results for the six Key Performance Indicator (KPI's), for example participation in 3x30 minutes moderate intensity sport and active recreation. The results are automatically broken down by key demographic subgroups (age, gender, disability, social class and ethnicity). The six KPI results for the user's area, will also be shown against several norms, so for example, if the user is a local authority, they will see the KPI result broken down by these pre-defined demographics, plus shown against the norm for the CSP and region to which they fall within.

At this tier, local authority users will also see the percentile within which their result falls and this will be indicated by a traffic light – green if their result is in the top 25%, red if it falls in the bottom 25% and amber for anything in-between. Each KPI result is then illustrated in a distribution chart, where the users local authority is displayed in the percentile it falls within.

Example of analysis at this tier: A local authority wants to know what percentage are volunteering in sport for at least one hour a week, and the proportion who are members of a sports club.

- **Tier 1 – Sports Results (National Governing Bodies only)**

Tier 1 also includes key data for sport specific indicators, such as the percentage participating in a particular sport. This tier is in the same way as Tier 1 KPI results, and there will be a total of 14 pre-defined results broken down by demographics.

- **Tier 2 – Other Performance Indicators**

This tier shows results for the sixteen other Performance Indicators (PI's). They indicate the proportions of the population who fall outside of the KPI's, (i.e. don't achieve the KPI or undertake more activity than in the KPI)

*Example of analysis at this tier: a Primary Care Trust wants to know the percentage of the adult population who, in the last four weeks have **not** participated in any moderate intensity sports or active recreation of at least 30 minutes duration (including walking and cycling). This will look very similar to Tier 1, but with a greater number of indicators. The output will also be the same as in Tier 1 (a chart and table with data broken down by key demographic subgroups).*

- **Tier 3 – Interactive analysis**

This tier is interactive, as it enables the user to 'build' their own analysis and interrogate results. There are two tools at tier three – profile analysis and cross tabulations.

Profile analysis allows users to build profiles of respondents and compare up to two of these for a particular survey question or result. The user builds their own profiles, (for example, men of a certain age vs. women of a certain age), and selects the survey question they want to look at. This analysis tool is most useful when a user wants to drill down into their own/others results and compare a respondent type with another e.g. men aged 16-24 compared to women aged 16-24 who both participate in swimming.

Example of analysis at this tier: a County Sport Partnership wants to know how the profile of men aged 16-24 who play football in an LA within their CSP boundaries who are members of a sports club compares to men aged 16-24 who play football in another LA within their boundaries who are members of a sports club.

The Diagnostic allows two profiles to be built using demographic and other variables. For example, a profile could be built of; men aged 45 plus who volunteer at least one hour a week; women aged 16-44 who participate in 3x30 moderate intensity sport and active recreation.

The extent to which the data can be broken down will depend on the sample size available. For some users, the profile built may result in the base size being too small (i.e. a base of less than thirty respondents) on which to run the analysis. The user will be notified that the profile they have selected results in too low a base for analysis.

If the user has a favourite profile which they will want to run for a number of questions, they can to 'save' their profiles so that they don't have to keep creating them.

The other tool available at this tier allows users to produce their own cross tabulations. This analysis tool is most useful when a user wants to look at lots of breaks within chosen sub-groups. For example, a user may want to see the KPI 1 result broken down by local authority (all 354) and gender. A cross tabulation would be generated that consisted of more than seven hundred columns, as there would be two results per local authority i.e. one for men and one for women.

The cross tabulation is therefore a much quicker and more practical tool to use when a user wants to look at the results by a large number of variables.

- **Tier 4 – Comparative analysis**

This tier enables the user to undertake comparative analysis. There are two types of comparative analysis a user can conduct – geographic or sports based analysis. If the user selects geographic analysis, they will be able to compare survey questions/results with up to ten other geographic areas of their choice, including other local authorities, Primary Care Trusts, County Sport Partnerships and regions. In addition, users will also be able to compare results to specially grouped geographic areas, such as ONS Corresponding Local Authorities, Cipa Nearest neighbours, IMD groupings and Core Cities groupings. Users will also be able to create their own baskets of comparators and save them as favourites.

Example of analysis at this tier: a local authority wants to compare its participation rate to other local authorities and County Sports Partnerships within their region. The local authority also wants to compare itself to the regional average.

Alternatively, the user may want to run sports based comparative analysis. This allows the user to compare survey questions or results with up to ten other spots or sports groupings e.g. racquet sports or team games. The functionality of this type of comparative analysis is the same as the geographic comparative analysis.

Access the full survey at
www.activepeoplesurvey.co.uk

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

UK SURVEYS AND THEIR APPLICATION TO LOCAL MANAGEMENT DECISIONS

Angela Groves
Consumer Insight Manager
British Waterways

1. Introduction

British Waterways is a public corporation. It manages and cares for over 2,000 miles of inland waterways through England, Scotland and Wales. BW has a well established customer insight programme, tracking visits to the waterways, customer satisfaction, and demand for new services and facilities. Whilst BW's insight programme is managed centrally, it is important the actual *insights* it delivers can be applied locally as well as nationally. This paper covers the benefits and pitfalls of using national surveys in local decision making and illustrates ways to make the most of information available.

2. Background

British Waterways (BW) manages and cares for 2,000 miles of canals and rivers throughout Great Britain. Management of BW's waterway network is delivered through ten regional business units³. The type of waterway varies between business units. There are clear physical differences between waterways; the River Trent in the East Midlands for example is different to the Leeds and Liverpool Canal through Yorkshire and Lancashire, the Caledonian Canal in the North of Scotland, or the Grand Union Canal running North from Brentford, West London.

The local waterway environment also varies between regional business units resulting in clear differences in the demographics of the local population, from rural villages to major cities, mill towns in the north like Burnley and Blackburn alongside the Leeds and Liverpool Canal, to new towns like Milton Keynes that has grown around the Grand Union Canal. As the environment varies, so do the reasons why people use and visit the canal, from a good place for stroll in the countryside to commuting to work either by foot or bicycle.

Despite these differences BW has one common vision. *Our ambition is that by 2012 we will have created an expanded, vibrant, largely self-sufficient waterway network used by twice as many people as in 2002. It will be regarded as one of the nation's most important and valued national assets. Visitors will be delighted with the quality of the experience and as a consequence many will become active participants.* BW's insight programme has an

³ A restructure announced on the 9th October resulted in the amalgamation of two regional business units, reducing the overall structure from ten to nine business units.

essential role in monitoring progress towards the vision. But whilst clear corporate objectives structure the overall research programme, it is important that the research, from methodology through to reporting, takes account of local differences to ensure BW's national surveys can be used to implement national strategy at a local level.

3. BW's Current Insight Programme

There are currently two core components of the insight programme:

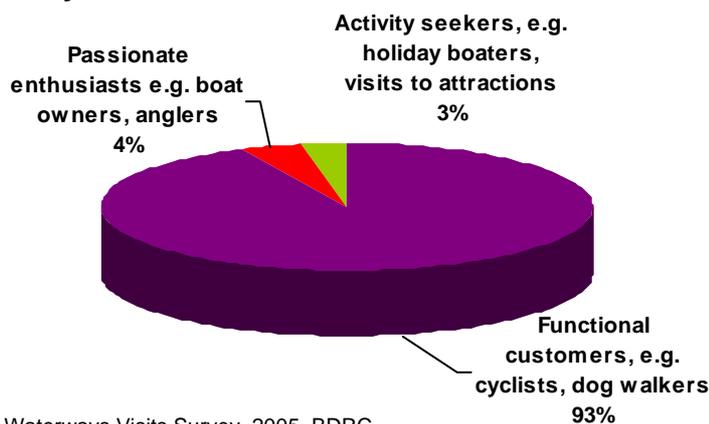
- Measuring the volume of customer visits;
- Measuring customers' satisfaction with their experience along BW's canals and rivers.

Volume

Volume is measured through the Inland Waterway Visits Survey (IWVS). Established as a pilot in August 2003, this survey has been running continuously since January 2004. When established, the main aim was to measure volume across the network, but this survey provides detailed information on who BW's customers are, how people use BW's canals and rivers, and how this varies between regional business units.

The IWVS reveals that there are around 300 million visits made per year to BW's canals and rivers. Passionate enthusiasts – boat owners and anglers, people passionate about the waterways they use who make up around 4% of total visits. 3% of visits are made by people looking for an activity around the canal, on a boating holiday for example, or visiting a canal side attraction. The remaining 92% of visits are much more functional in nature walking the dog, a bike ride, walking to work, visiting a canal side pub etc. – where the canal is part of people's everyday lives.

British Waterway's Customer Profile



Source: BW Inland Waterways Visits Survey, 2005, BDRC.

Satisfaction

The second objective – satisfaction – is measured for each individual group through a range of research methods, including postal surveys, face to face interviews and telephone surveys. Whilst the primary aim of these surveys is to monitor satisfaction, each goes further asking customers, for example, about points for improvements and drivers behind their visit.

4. National surveys, local applications

Managing surveys on a national rather than local basis, whether monitoring volume or satisfaction, provides a number of benefits for an organisation like BW. The remainder of this paper outlines some of these benefits and how, from experience, it is possible to get the most out of national surveys.

Value for money

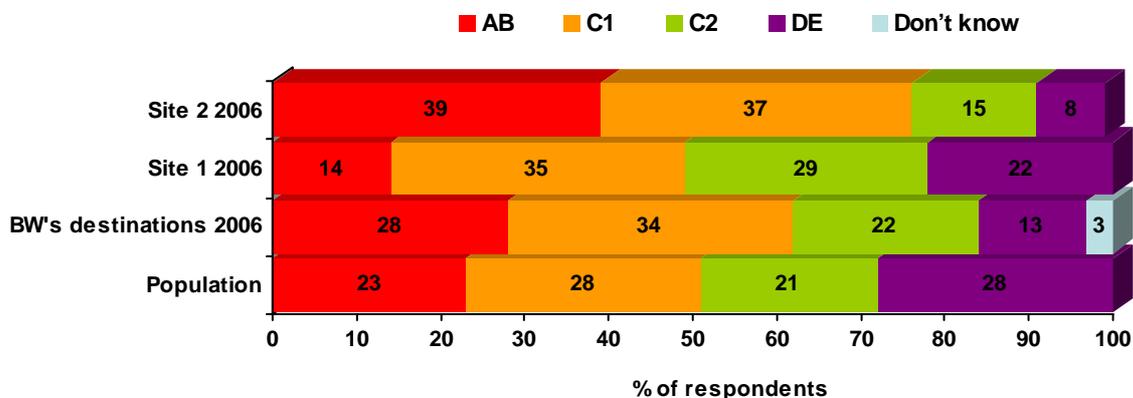
There are clear economies of scale when managing one larger compared to ten smaller surveys, one set up cost, one analysis cost for example. One survey also avoids unnecessary repetition with two or more business units commissioning their own research to answer the same question.

Benchmark

Central management ensures the research, from method of data collection and questionnaire content through to dissemination of results, is consistent between regional business units. Such consistency offers a vital benchmark, allowing comparisons to be made against the overall BW picture, between individual business units, and over time tracking the rate of progress for each business unit. Individual surveys conducted on a regional basis would not provide the same level of information.

The national approach provides the advantage of two benchmarks when considering who our customers are. Visitor surveys at a range of sites can compare socio-economic group, for example, against the population as a whole through published national statistics and against the BW picture when all visitor surveys are combined. Thus, although a site may under or over represent a specific socio-economic group compared to the population the opposite may be true when compared to other canal side destinations. From the example below, site 1 under represents people from socio-economic group DE, but when compared to other canal side destinations, it can be seen that site 1 is actually amongst the most inclusive sites.

Visitor Profile at Canal Side Destinations



Source: BW Visitor Surveys, 2006, BDRC; Census 2001

Despite the clear benefits there are a number of areas requiring attention in order to get the most of the research conducted nationally and applied locally.

Multiple uses

There will always be one primary objective that structures any research project, and it will be data relating to this primary objective that people expect to see reported. The survey itself however, is likely to go far beyond this, either through additional questions included on the survey or analysis of the data collected. A questionnaire established to monitor customer satisfaction, for example, is also likely to record at least simple the demographic of visitors, information about what people did when they visited, and suggestions for future improvements.

It can be easy to forget about the information that exists beyond the primary objective; a challenge exacerbated when working with remote offices. This hidden information can often provide valuable insight. Making the most of the information is a two way process. Centrally, it is essential to find time to do the analysis and the most suitable avenues to disseminate the research, whether more formal reports, or more informal newsletters etc. It is also crucial that business units are encouraged to ask questions of the national research and recognise that further analysis is possible.

Local context

Whilst business units share one common vision the waterways are different, the waterside towns, cities and villages are different, the demographics of both customers and the local population are different and there may be specific regeneration and restoration projects changing people's attitudes and behaviour towards the local waterways. Local issues, like those listed, should be considered through the whole research process, from developing the survey to analysing the results.

When preparing a research brief it is important to check whether it is applicable across all areas covered. When using face to face interviewers across a broad range of sites, for example, it may be necessary to send two interviewers to some sites to avoid lone working concerns; this may not be necessary at other sites.

In order to get best value from the research it is important that surveys ask the right questions, useful on both a national and local perspective. There are no economies of scale if additional research is required because the national survey only collects half the information required about a specific area. From a customer perspective, an additional piece of research also runs the risk of alienating customers if they feel they are being over surveyed. Specific questions may need to be considered and whilst applicable to only to one site at one time due a regeneration project, may provide extremely useful data at a much lower cost than additional *ad hoc* survey.

It is also worthwhile to consider if all questions are applicable to all sites or business units. When rating local facilities it can be easier from a project management perspective for example to use the same list of facilities for all areas. Whilst towpath cleanliness or condition of signage may apply to all, asking about a children's playground, for example,

may be relevant at only half the locations covered. If a question is not relevant it shouldn't be asked; it is a waste of money and confuses and annoys customers. Decisions to remove or add questions require careful management to ensure the right questions are asked in each location but ultimately these decisions make for a better a survey. The national survey needs to be flexible enough to allow these local changes.

Such considerations may be very simple but also very easy to forget at the planning stage, and whilst changes can be made later on, can often cause considerable inconvenience when not factored in at the start.

Regional nuances can be challenging when interpreting research findings; local teams will often have more knowledge about everyday changes to a specific site than the central research function. Presenting and discussing the findings face to face can often provide a means to elicit local differences and suggestions why satisfaction scores, for example, are different in one region to another. Such interaction is much more effective than simply supplying a paper copy of the results, whether interpreting and applying the results, identifying areas of further analysis or collecting ideas for future improvements to questionnaires.

It is can also be useful to think about the people working in regional offices. Everyone is likely to have a slightly different professional backgrounds and varying experience of market research. Although the same information must ultimately be conveyed it is likely that each presentation should be approached differently to ensure it is most appropriate for the audience. Again this is very simple, but it is all too easy to try and make a one size presentation fit all.

Involvement

Good relationships with remote business units are essential. It is important that remote offices feel included in the research process, rather than just handed the final report once the project is concluded.

Regional offices should be involved in the planning process, see the questionnaire beforehand, be kept informed of when and where the research is happening, and know when the findings will be reported. It is important from the outset that remote regional offices recognise the research is applicable to them on a local basis and not just measuring corporate objectives.

Timings

National surveys can sometimes appear cumbersome and are likely to take longer to conduct and report than smaller local surveys. It is important interim findings are reported where sample size is practical. Everyone should know when reports will be available and what these will cover; it can often be more practical to report headline findings as soon as possible and provide a more detailed report later.

Limitations

It is important to recognise limitations. It is sometimes impractical or uneconomical to answer specific local questions through a national survey. This is not a fault of the national survey; a project can never be everything to everyone. It is better to recognise the limitations of a national survey rather than try and stretch it too far and draw spurious conclusions.

If an *ad hoc* survey is needed, a national survey provides a wealth of contextual and benchmarking information otherwise unavailable. This information should be used to shape the brief offer further support findings from the *ad hoc* survey, highlight differences between other areas and to avoid repeating asking the same questions again.

5. Recommendations and Conclusions

British Waterways' research and insight programme is managed centrally and disseminated across ten regional business units. This paper has addressed some of the benefits and challenges of this approach and also considerations to ensure that national surveys can be used most effectively on a local basis. In summary, these considerations include:

- Involve regional offices throughout the process
- Consider the feasibility of the research across all locations. Do local differences require amendments to the methodology or questionnaire?
- Keep regional offices up to date on progress, when the findings will be reported and what the report will cover
- Once reported fully utilise the benchmark information, comparing one location to the national picture
- Tailor the analysis to take account of local differences, whether geographical, population, or specific developments in the product offer
- Be flexible and imaginative when analysing the data – national surveys collect a wealth of information but a fixed approach to analysis fails to make the most of this information
- Place the findings in local context when interpreting the data; discuss the findings face to face to understand specific changes, why they have occurred and what they mean locally
- Be aware of the limitations; a national survey may not be the answer
- Check progress and amend research accordingly. If last year's research findings impact on national and local decisions, it's likely next year's research needs to change and take account of the impact of these decisions on the product offer.

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER
THE JOYS OF STATISTICS AND VISITOR MONITORING'

HOW TO UNDERSTAND CUSTOMERS TO SUPPORT ECONOMIC AND SOCIAL POLICY

Paul Bivand
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Inclusion, Centre for Economic and Social Inclusion (CESI)

Scoping under-representation in visits

The Government has, in line with its social aims, been trying to ensure that services, including recreation services, are not just available to all, but used by all. The Government is particularly concerned about this issue in relation to 'diversity groups' or sometimes, 'disadvantaged groups'. A measure of this is whether or not usage of services is in line with their proportion of the population. This requirement has been applied by sponsoring Departments to bodies in the recreation field, by DCMS to heritage and sports bodies, and by DEFRA to Natural England and its predecessors.

The inadequacies of data to measure whether these policy aims were being met led DCMS to commission a new survey, the Taking Part survey. The Countryside Agency, now incorporated within Natural England, had some information from previous and (then) recently commissioned Day Visits surveys, which led them to believe that there was significant under-representation in visits by the groups identified.

As part of a programme of work on this issue, the Countryside Agency commissioned *Inclusion* to scope an economic and business case for remedying under-representation. This was a necessary step because businesses and providers in the recreation field may have incentives to market their services to non-traditional groups, but may not be aware of market possibilities, and that where there is persistent under-representation, a case can be made for some intervention, whether by financial incentive or by regulation. The Treasury requires evidence of a 'market failure' as part of a funding case.

Defining the groups

A number of different population groups of interest were specified as part of this scoping exercise.

Ethnic minorities were identified by Census 2001 definitions. In most cases, the available data did not permit distinctions between different ethnic minorities.

Disabled people were identified differently in different surveys. We attempted to standardise on something close to the Disability Discrimination Act definition, which relates to a health condition that is long-term and limits daily activities, in summary. This is quite a broad definition, and certainly wider than many common understandings. A minority of disabled people are wheelchair users.

The Countryside Agency was interested in whether there was under-representation in visits by young people. These were identified for our scoping exercise as aged 16-24, as the available data did not permit analysis by closer age range.

It was suggested that we investigate under-representation in visits by Inner City residents. After investigation, it was found that no agreed definition of Inner City existed for statistical purposes, and neither was one likely to be forthcoming.

Defining visits

For a scoping study, we used a number of data sources to check whether the preconception of under-representation by the groups was correct, the extent of under-representation, and whether under-representation existed at the level of visits taken or participation by visitors. For much of the analysis, we used a minimal definition of visitors. This was that if someone was recorded in a survey as having undertaken a visit, they were a visitor, regardless of how many visits they undertook. It appears that there are systematic differences in both dimensions, in relation to whether people visit at all, and in relation to how many visits are undertaken. The initial reports for the DCMS Taking Part survey appeared to be based on participation as having undertaken at least one visit. This approach was broadly followed, suggesting that remedying participation at all might be a higher priority than the extent of participation in relation to the policy goals.

The surveys used were the 2002/3 GB Leisure Day Visits Survey, with England results only, and with visits to towns for shopping, theatre etc. excluded, The General Household Survey, which has a periodic module on recreation activity, and the initial reports of the DCMS Taking Part survey. Further studies were examined but these three were the main ones used. In addition, the elements of the GB Day Visits survey looking at spending on visits were used in scoping the economic case, as well as the official Expenditure and Food Survey. This last identifies spending on visits and items that might conceivably be related to visits (such as buying tents).

Defining which visits

The definition of a visit for our scoping study concluded as being 'outdoor recreation'. However, none of the available studies specifically questioned regarding the 'outdoor recreation' as it has subsequently been discussed. The measures we used were therefore proxies attempting to use the available information to approximate as closely as possible the developing discussion about how to develop and operationalise for survey purposes a definition of 'outdoor recreation'. For a scoping study, this was appropriate.

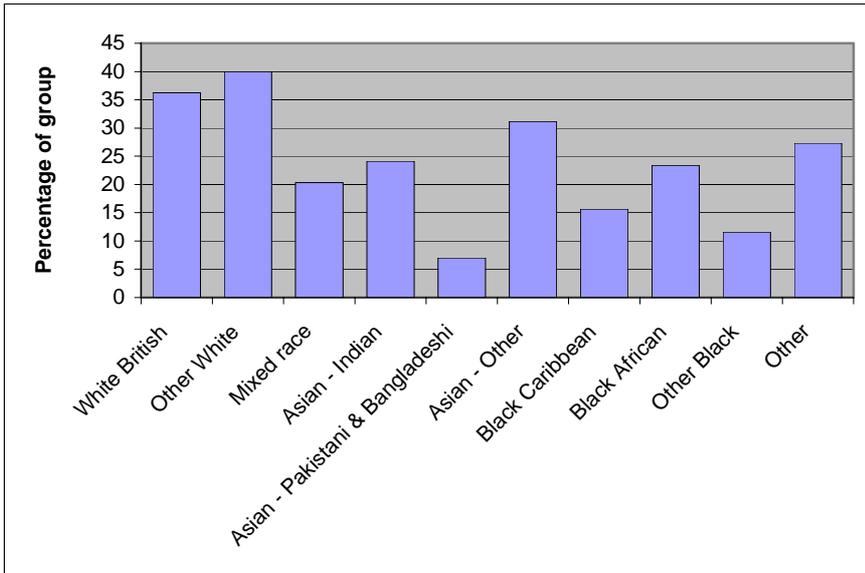
Defining representation

In order to identify the proportionality of representation in visits, we needed to identify the proportion of a group who undertook visits (within the time-frame of the particular survey). It was important to specify this as some of the existing literature and survey reports proceeded by identifying how the numbers of a group who undertook visits compared with their numbers in the population. Where the group is relatively small, and some of the groups in question are small in percentage terms, it is difficult to work out whether any perceived under-representation is in fact significant, especially when the reported figures are rounded to the nearest whole per cent.

The surveys we used were household surveys. This was necessary because, in order to identify the participation rate, we also had to identify non-participants. A household survey is an ideal method for doing this, as a representative sample can be asked whether or not they actually did participate.

Indicative charts – visits to non-urban destinations 1

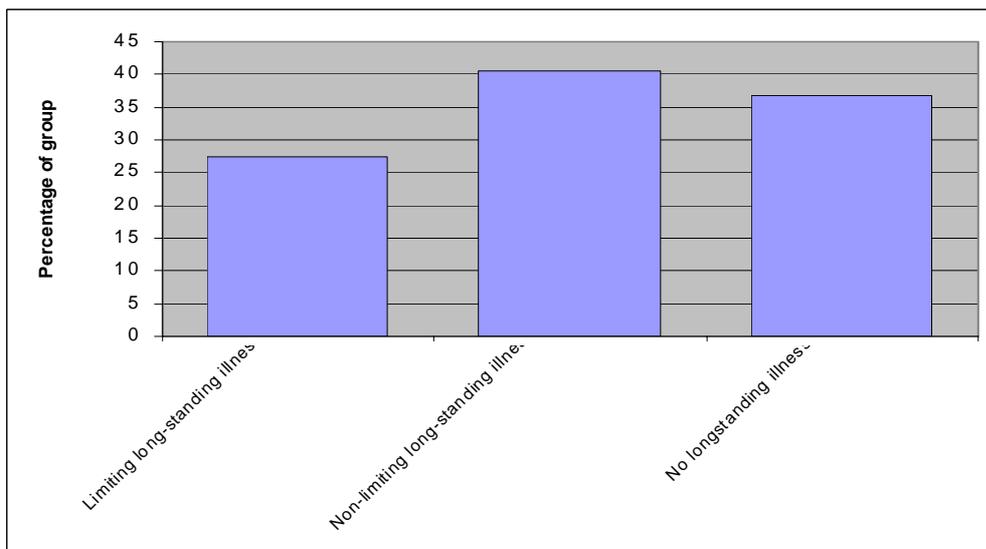
Chart 3.6: Ethnicity: proportion undertaking at least one 'outdoor recreation' in last four weeks



Source: General Household Survey 2002-3

Indicative charts 2

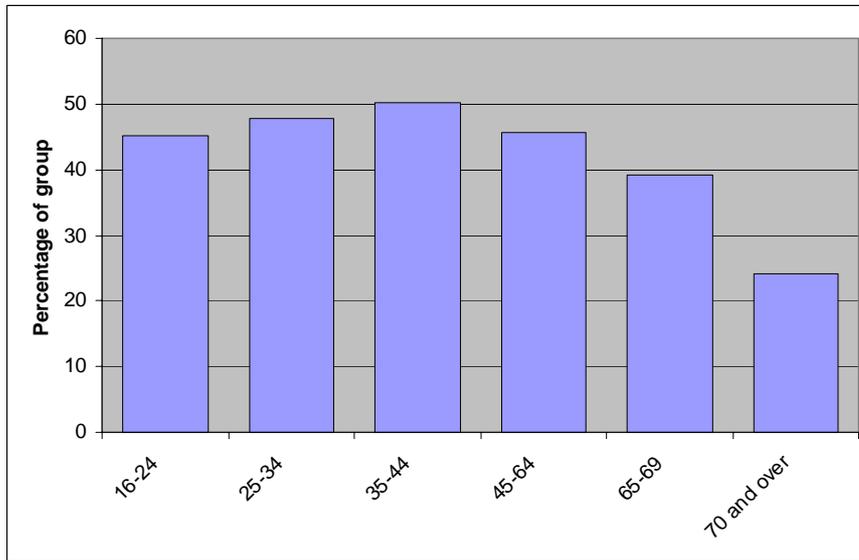
Chart 3.1: Health: proportion undertaking at least one 'outdoor recreation' in last four weeks



Source: General Household Survey 2002-3

Indicative charts 3

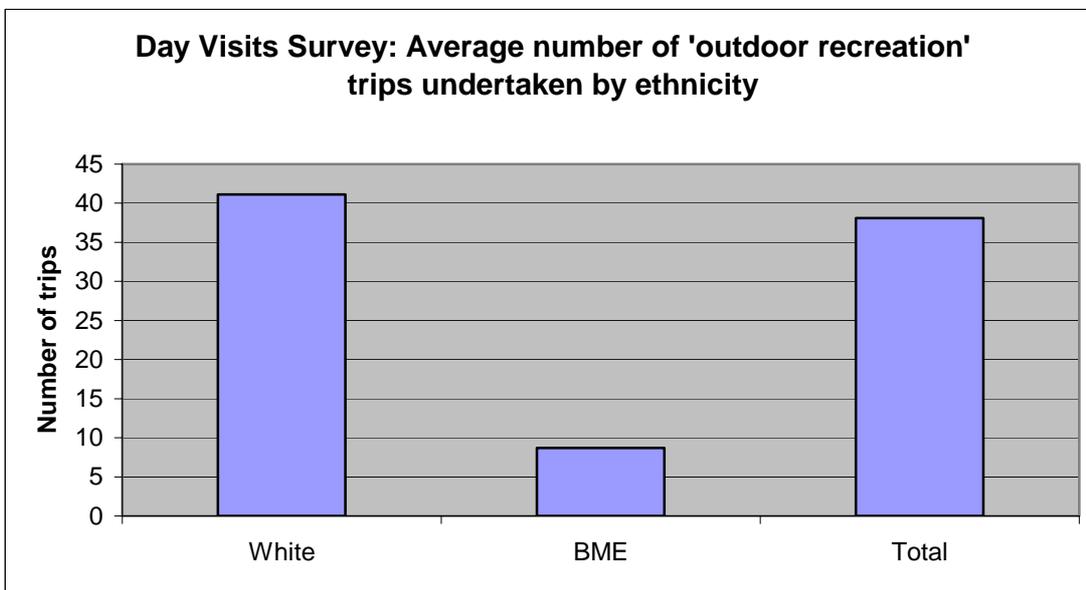
Chart 3.11: Age: Proportion undertaking at least one 'outdoor recreation' activity in last four weeks



Source: General Household Survey 2002-3

Participation extent – 1 (including non-visitors)

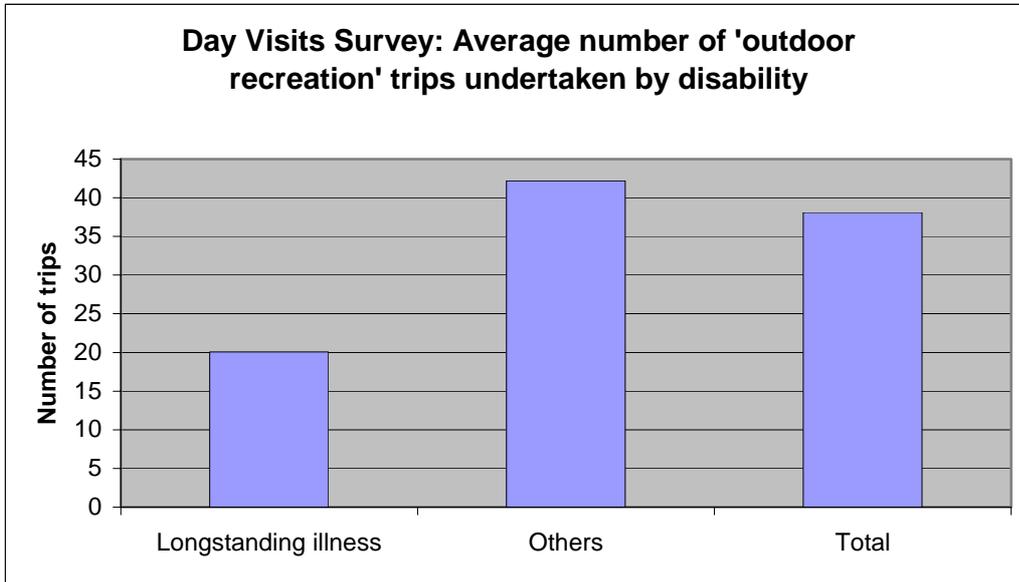
Chart 3.8 GB Day Visits Survey



Source: GB Day Visits Survey respondents' analysis

Participation extent – 2 (including non-visitors)

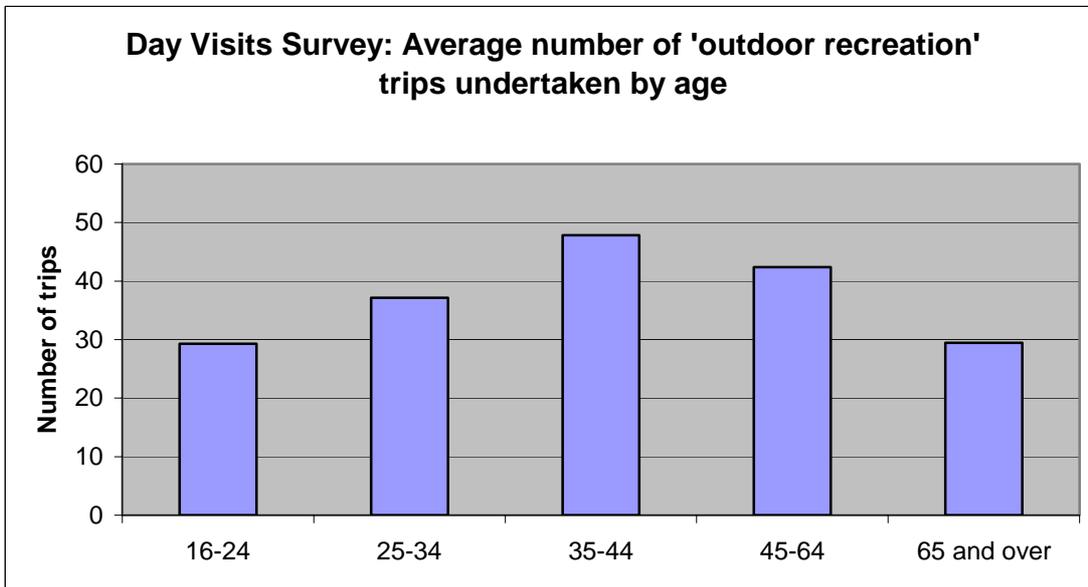
Chart 3.3 Day Visits Survey



Source: GB Day Visits Survey respondents' analysis

Participation extent – 3 (including non-visitors)

Chart 3.13 GB Day Visits Survey: Trips taken by age



Source: GB Day Visits Survey respondents' analysis

Towards an economic case

Once we had identified whether or not there was under-representation, we undertook further scoping work to identify incomes and spending patterns of the groups. We have

previously identified positive trends in rising employment rates for ethnic minorities and for disabled people in general, and consequent improvements in income and spending power. For some sub-groups, such as the Indian ethnic minority group, employment rates and incomes are close to those of white people or higher. Other groups lag, but still show improving trends. Survey sources can identify incomes and spending power, and to an extent actual spending patterns.

The Department for Work and Pensions publishes regularly an estimate of the spending power of disabled people. While the average spending power remains low, there have been significant improvements that may relate to the improvements in employment among disabled people, and in some cases to continued improvements in pensioner incomes among those retiring with occupational pensions acquired before the trend towards personal pensions became established.

The Government has not only tasked Natural England and DCMS bodies with ensuring equality in participation in their fields, but has a priority to raise employment (and, therefore, income) of disabled people in particular to very much more equal levels. Therefore, if this is successful, one may expect that the spending power of disabled people would show a radical improvement.

Once actual spending power of a group can be established, and the existing spending on visits, then it is possible to scope the potential for estimating growth possibilities for the outdoor recreation sector.

Further issues

Lastly, it should not be ignored that visits and outdoor recreation raise a number of cultural issues. In my presentation to the seminar, I showed an image of a painting intended to be reasonably representative of many found in great houses that are the destinations of visits. It showed a battle in India in the eighteenth century in which the British East India Company forces were victorious, in dramatic and heroic fashion. I asked the audience to imagine the impact of such images on visitors of Indian extraction.

It would also be fair to add that understandings of the picturesque have changed within Britain over time, and that views of wild places have not always been regarded as beautiful. It would be wrong to assume that cultural assumptions held by substantial sections of opinion were held by all.

Scoping economic and business cases for under-represented groups in outdoor recreation:
Paul Bivand, Natalie Branosky & Dave Simmonds, Centre for Economic & Social Inclusion
2005, report to Natural England.

www.cesi.org.uk.

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Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

MONITORING NATIONAL WAYMARKED WAYS IN NORTHERN IRELAND

Ian McClelland
Research and Monitoring Officer
Countryside Access and Activities Network (CAAN)

Introduction

The Countryside Access and Activities Network (for Northern Ireland) [CAAN] is an umbrella organisation which was established in 1999 with the aim of bringing together groups and bodies that have an interest in countryside recreation in Northern Ireland. This comprises those participating in countryside recreation activities, local and central government organisations, farmers and landowners, community organisations and providers of outdoor education.

CAAN has been involved in the management and development of a number of major projects including the creation of eleven long-distance walking trails called *Waymarked Ways*, four family cycling trails, one canoe trail and one horse-riding trail. Each set of trails also fall under the remit of CAAN's Visitor Monitoring Programme.

Visitor Monitoring Programme

CAAN's Visitor Monitoring Programme consists of three areas:

- Visitor Counting
- Visitor Profiling - Undertaken as part of a Visitor Survey
- Opinion Surveys - Undertaken as part of a Visitor Survey

Visitor Counting is the collection of quantitative data in order to get an indication of the total usage of a particular product. This is normally undertaken using small, electronic, automatic people counters which record an incident every time someone passes or walks on them. Some devices use small infra-red beams which are broken when a person walks past, some use passing body heat to register an event, while others are buried under the ground and register an event when someone walks on top of it.

However, some of the counters used have limitations as not all register the direction which a person is moving when an event is recorded. This means that there is always the possibility that a person may be counted twice as they return along the same path. Additionally, those counters which are buried beneath the ground can sometimes have a tendency to let the replaced soil sink over time, thus permitting the hollow to fill with water. As a result, a person using the trail may try to step over the puddle and consequently avoid the counter altogether.

Visitor Profiling and Opinion Surveys are normally undertaken as part of a bigger Visitor Survey. Visitor Profiling is the collection of demographic and socio-economic information to enable a profile of the product user to be constructed, while Opinion Surveys measure the attitudes and perceptions of visitors regarding issues such as the provision of facilities.

Rationale behind Visitor Monitoring

The rationale behind Visitor Monitoring is to better understand the levels of trail usage; to better understand the trail users themselves; and to gauge levels of satisfaction. It not only provides valuable feedback about management performance and helps identify areas which may be of concern but can also be used to form the basis of grant applications as the provision of usage statistics can help strengthen the argument for new trails etc.

In theory it would be beneficial if CAAN could use both Visitor Counting and Visitor Surveys for each of its products but quite often this isn't feasible. For example, it is very difficult to install electronic people counting devices on Lough Erne to monitor canoeists using the Lough Erne Canoe Trail. Even locating counters on access points such as canoe steps is problematic as due to the length of the Canoe Trail (around 50 km) canoeists can join at a large number of locations and it is not practical to install counters at each point.

Although this paper primarily aims to examine visitor monitoring on Waymarked Ways, it also briefly explores visitor monitoring results from one of CAAN's cycle trails.

Visitor Monitoring on the Craigavon Lakes Mountain Biking Trail

Craigavon Lakes Mountain Biking Trail has had two visitor counters installed on it from August 2005. The trail itself is 10.6km long, is shaped like a figure '8' and takes approximately one hour forty-five minutes to complete. At the bottom of the figure '8' there is a Watersports Centre where people can hire bikes to use on the trail and nearby there is a main car park which visitors can use. One counter is located near the Watersports Centre and a second counter is located towards the top of the trail near Tannaghmore Gardens.

When examining the aggregate totals of events recorded for each counter on the trail from September 2005 through to August 2006, the first thing that stands out is that the counter at the top of the trail has a lower number of events recorded than the counter near the Watersports Centre. It is likely that this is due to several reasons. First, the close proximity of the Watersports Centre; second, the close proximity of the car park; and third, the fact that many visitors only cycle the lower half of the trail. One possible reason why the totals for September, October and November are higher than usual is a result of school trips using the trail during these months. In July, summer schemes also use it.

When the same data is broken down by hour of the day, it can be seen that the most popular hours are between 2pm and 4 pm. When it is further analysed and broken down by the day of the week, Thursday and Sunday are the two days when the trail is most popular.

This information is particularly valuable when visitor surveys are to be undertaken on the trails. If an interviewer is looking to obtain, for example, three hundred responses and a stratified sample is not required, then the most effective time to visit the trail to undertake the survey is on a Thursday or a Sunday between 2pm and 4pm.

Visitor Monitoring on the Waymarked Ways - Visitor Counters

On each of the eleven Waymarked Ways that CAAN has developed across Northern Ireland, it is planned that three electronic people counters will be installed on each. As with the counters located on the Mountain Biking Trail, this data can then be analysed in numerous formats and can provide some interesting results.

For example, when the daily aggregates for May 2004, May 2005 and May 2006 for the Causeway Coast Waymarked Way are analysed, the most notable features are the huge anomalies which occur for a period of approximately three days each month. These anomalies are due to the North West 200 motorcycle race taking place when thousands of visitors converge on the area for one weekend to watch the racing. During this period, a large number of people pass the visitor counter on the Waymarked Way. [It should be noted that the statistics for the rest of the month of May appear abnormally low due to these anomalies. However, this is not necessarily the case as many of the days had almost 100 people recorded.]

One of the difficulties in comparing Waymarked Way numbers is that there is probably a close correlation between the number of people using a particular walk and the nature of the walk itself. For example, most of the Newry Canal Way is constructed of tarmac and the walk is flat while the Antrim Hills Way is over fields and mountainous land. This lack of uniformity can have an impact on the number of visitors as people are more likely to walk part of the Newry Canal Way on a Sunday afternoon while to walk the Antrim Hills Way would require proper walking clothes and some preparation.

The Newry Canal Way currently has three people counters located on it. When the aggregate monthly totals for these counters are analysed, a definite seasonal trend is apparent with the numbers recorded between March and September being considerably higher than between October and February.

Visitor Monitoring on the Waymarked Ways - Visitor Surveys

As has already been stated, CAAN's Visitor Monitoring comprises two main areas - Visitor Counters and Visitor Surveys (incorporating Visitor Profiling and Opinions Surveys).

In terms of Visitor Surveys, these are undertaken on an annual basis across the network of eleven Waymarked Ways. This work is currently being carried out by Ipsos MORI with 2006 being the third year of a three-year contract. To date, 418 face-to-face interviews have been undertaken between May 2006 and August 2006 and carried out during weekdays, weekends and various Bank Holidays.

The results from the survey have generally been positive although there are some areas which need to be addressed. The following results are a small section from the actual survey itself.

Age Profile: This shows that there are a mix of ages using the Waymarked Ways although the 16-34 year olds are lower in number than other age bands.

Gender Profile: In terms of gender, more males than females use the walks.

Place of Residence: Around 73% of all respondents lived in Northern Ireland; 9% were from Great Britain and a further 9% were from the Republic of Ireland. Outside of the UK and Republic of Ireland, numbers were low. However, as the tourist sector in Northern Ireland has been growing year-on-year, it is hoped that these numbers will eventually increase.

Overall Satisfaction: Generally speaking, levels of satisfaction are high. However, due to a lack of historic data it is not possible to determine whether the graphs illustrate trends or annual variance in the results.

Regularity of Visit: 37% of respondents visit a Waymarked Way at least once a week and this is encouraging.

Awareness: Unfortunately almost two-thirds of respondents had not heard of Waymarked Ways. While this is disappointing, it illustrates an area that needs to be addressed.

Use Route Again: 97% of people questioned said they would use the route again.

Conclusion

Visitor Monitoring is an essential part of CAAN's Countryside Recreation Strategy as it not only provides information on the number and type of visitors using a particular product but also helps in the decision-making process of resource allocation and management action. Unfortunately, due to financial constraints, contracts awarded in order to undertake Visitor Monitoring are often only for short periods and this inhibits the capacity to observe many long-term trends. However, even with such data limitations, the information acquired is still extremely useful.

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

MONITORING FROM THE START - ASSESSING THE USE OF OPEN ACCESS LAND

Joanne Hall
Open Access Project Manager
English Nature

1. Introduction and Background

Monitoring Open Access

Following the mapping of approximately 1 million hectares of open access land, under the countryside and Rights of Way Act, the new right of access has been available nationwide since the end of October 2005. A monitoring programme is underway in order to look at the impacts and outputs of the legislation on the ground, and to identify changes to countryside visits attributed to the opportunities created.

2. The Need for Information

The ongoing campaigns by access and recreation groups for the extension of public access and recreation opportunities in the countryside, as well as the large financial investment open access has represented, have raised the profile of the legislation, and invigorated demands for information about the use of the new right, and the extent to which it has met high government aspirations;

'Open access should secure greater public access to open countryside and extend opportunities for all people to enjoy the countryside in a way that protects land management, nature-conservation and heritage interests (and attracts money into rural areas).'

The Government's consultation paper "Access to Open Countryside in England and Wales

Citizenship

As well as representing aspects of citizenship through greater public access to areas of the countryside, CROW has also presented an opportunity to diversify overall access and recreation opportunities in order to meet different customer needs and address elements of current political, economic and social issues:

Health

There has been an increased need for public bodies to look at ways to tackle increasing rates of obesity and heart disease; this is a key deliverable for Natural England who are looking at ways to expand public access opportunities to green space, encouraging

engagement with the natural environment for mental and physical health benefits. The rise in health concerns has also become a more prominent social issue, this represents a significant window of opportunity for organisations supplying and delivering access and recreation, to re design, develop and market access and recreation opportunities to meet diverse customer needs, throughout a period of greater social awareness and greater receptiveness to the wider benefits the products offer.

Rural economic sustainability

The sustainability of the rural economy through access recreation and tourism has also been a focal point surrounding the extension of recreation and access opportunities in the countryside. The outbreak of Foot and Mouth saw much of the countryside closed for business, severely impacting on the rural economy, not just through agriculture, but also through the significant economic contribution that tourism and countryside visits make, in many rural areas.

In order to attract existing customers back to the countryside and encourage new visitors, the new right of access can be harnessed as an opportunity to signify the re opening of the countryside, but there is a need to address key information and reassurance messages through effective communications, that balance the needs of customers, with land managers and farmers as well as the natural environment, this will be key in establishing a sustainable future for open access, as well as access and recreation products as a whole.

3. Tackling a climate of decline - Developing a secure infrastructure

The Great Britain Day Visitor Survey has detected a consistent decline in countryside visits indicative of the poor market share countryside access and recreation now achieves within a highly competitive leisure market.

Social and economic shifts resulting in faster paced lives, greater disposable income, but less time for leisure, has seen significant shifts in how people spend their money and their time. Such changes will make it harder and harder for countryside, outdoor access and recreation to compete unless it addresses where it no longer meets customer needs and adapts itself and its products.

This overall decline must be addressed through the organisations that both supply and deliver the recreation and access products available, by ensuring products available meet the needs of diverse audiences at a national and local level. The gathering of customer information will be vital in identifying those needs.

Whilst the delivery of the governments PSA target through the implementation of CROW Part 1, represented a huge milestone for the Countryside Agency, this is just the first step towards achieving those overall government and organisational aspirations, not just for open access, but countryside and outdoor access and recreation as a whole.

The push to invigorate public participation, interest, demand, and ultimately, use, of the recreation and access infrastructure that has been built through a variety of access legislation, as well as gathering and sharing the information and best practice required to balance nature conservation and land management, through effective access

management, represent just some of the key tasks ahead for Natural England and its partners.

4. The need for customer information

As well as gathering key customer information to enable products to adapt to changing needs, identifying appropriate communication, marketing and strategic policy development at a high level, the Open Access monitoring programme has also been designed to identify the impacts and outputs of the new right of access, enabling the assessment of the extent to which open access achieves growth in market share over time, as well as capturing national and local customer information to assist open access implementation and delivery. In this sense, customer information is also required in order to measure the success of particular products in achieving long-term aims, as well as ensuring delivery on the ground has no detrimental impacts to land management, and nature conservation.

The programme will allow the identification of trends in use, and gather information to evaluate access management measures in place, enabling the provision of guidance and best practice to access authorities, access and land managers on the ground.

The core element of the monitoring programme is a three-year national on site monitoring project. This is a national visitor survey that looks at a stratified random sample of open access sites across the country allowing a clear representation of the use of open access land sites over time.

The sample has been identified through GIS analysis of open access mapping layers looking at land size; land type, demographic and regional administrative boundaries. The sample contains popular heavily used sites, and less popular quieter sites.

Despite the lower levels of activity anticipated at less popular sites, the selection of a robust representative sample of sites is the only true way to establish indicative patterns and levels of use of open access over the period, establishing demand and use over time, and providing vital information required in order to identify customer needs and promote open access effectively.

The national survey consists of a visitor questionnaire and observational survey. Two surveyors work together on site to observe and interview visitors, tracking visitor patterns of use across sites, by detailing with visitors, their route to, throughout, and onwards, through the use of Personal Digital Assistant devices. Visitors' routes are also observed independently and digitised on the site.

Over the three-years, analysis of such spatial digital information will allow the detection of any significant changes in use. The profile and customer information that will be linked to the routes via the survey will allow the detection of trends, and the variability of visitor behaviour on such sites.

5. Building the picture – Local Information

Whilst the national survey provides the organisation with a good baseline picture of the use of open access, for information to be more relevant at a local level, meeting specific management needs, local monitoring is required, and this also provides an opportunity to

boost the national picture. The Countryside Agency has harnessed the opportunity to extend the national project by designing and advertising a local monitoring tool kit for access authorities interested in monitoring their local open access sites. The tool kit comprises of a local visitor questionnaire and observation survey, both are comparable to the national survey to allow information to be extrapolated for use at a local and national level. In addition the tool kit supplies guidance notes, data processing, analysis and reporting frameworks to enable authorities to use the data they collect for their own needs.

Some of the benefits of monitoring at a local level are detailed below and are enabled through the use of the tool kit:

- Management and planning information
- Visitor information to inform service development and support
- Establishing awareness of Open Access Land
- Gathering visitor profile information
- Monitoring dog activity
- Establishing impact and change of use following Open Access
- Establishing the impact of promotional activity
- Assessing the impact of Open Access on nature conservation sites
- Responding to local requests to monitor
- Establishing the impact of AMGS spend
- Sharing information with partners
- Comparing local activity with national findings

The tool kit can be used by access authorities, or by any access managers interested in gathering information to aid management on open access sites. The tool kit has also been shared with AONB's, NNR's and National Parks.

If you are interested in using the tool kit and would like to benefit from data processing and analysis of the information you collect via the national programme next year, please contact:

Joanne Hall or Rob Keane based in Natural England's Manchester office, on 0161 237 1061 or email:

Joanne.hall@naturalengland.org.uk

Robert.keane@naturalengland.org.uk

6. Conclusion

Customer information and research is key to strategic planning in terms of identifying ways in which countryside and outdoor, access and recreation can adapt to sustain its position in highly competitive and changing markets, making sure products become more responsive to changing customer needs.

Understanding how recreation and access products available meet the needs of customers, as well as their position within a competitive market through more openness to market orientation, customer centric decision making and strategic business practice throughout government organisations and agencies will only improve reaching an acceptable balance between the need to achieve social, political and organisational outcomes, whilst ensuring investments are viable within competitive markets, reflecting the needs of customers.

The current recreation and access infrastructure offers diverse opportunities for public enjoyment, now is the time to look at ways in which such products can be more amenable to the needs of different customers. Whilst accepting that opportunities are available to all, accepting that one size does not fit all in terms of individual choice and preference is also key in harnessing opportunities to effectively promote and target opportunities at a local or regional level, to diverse customer audiences, ensuring products address different obstacles, demands and pressures that arise from a dynamic and changeable political, social and economic climate. There re no overnight solution, but customer information will be key in developing and implementing policy overtime. The Natural England strategic outcomes reflect the need for public engagement with green space, and the natural environment, as first step towards realising longer term benefits and aspirations for countryside access and recreation, but there is now a greater focus on local space for local people, harnessing opportunities on the door step, as one step towards highlighting greater and diverse opportunities, through education, engagement and benefit realisation over time.

For more information on Natural England, recreation and access objectives, and to see how you could get involved, please visit the website www.naturalengland.org.uk

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

MEASURING VISITS TO WOODLAND IN SCOTLAND: THE SCOTLAND ALL FORESTS SURVEY

Neil Grant
Assistant Statistician
Forestry Commission

Abstract

The Forestry Commission is interested in the number and profile of visitors to our forests and have previously employed a variety of different methodologies to collect this information, including local site level surveys and the installation of permanent mechanical counters.

Following a successful pilot, TNS were commissioned by FC Wales and FC Scotland (FCS) to implement surveys following a new methodology. This paper presents details of the 'All Forests Scotland' survey which aims to provide more reliable estimates of visitor numbers, activities undertaken and present an accurate profile of visitors to a wider range of Forestry Commission sites.

Objectives

The Forestry Commission has a desire to know and understand our customers. By understanding their demands we are better able to supply appropriate facilities and ensure the facilities are placed in the locations they are required. The objectives of our data collection with respect to visitor monitoring are as follows:

- To characterise the profile of visitors in terms of visitor type, for example, local resident, day trip visitor, visitor staying locally overnight, age, gender;
- To measure volume of visitors across the whole FCS forest estate;
- To consider the attributes of trips to forests, for example, transport used to travel to forest, distance travelled to forest, length of stay on site, expenditure;
- To identify activities undertaken on site and facilities used;
- To explore where people go, which access points they use and identify which activities are pursued at different locations.

The collection of the data described above provides important evidence for policy and resource allocation decisions. The data will help to direct further targeted research, and in particular, the collection of visitor expenditure estimates provides evidence for economic valuation work.

Background

Forest visitor monitoring information has been collected throughout Great Britain since 1996. There were previously two main elements to the programme:

Interviewer based surveys - an annual programme operated with around 40% of the 30 Forest Districts (FDs) across GB taking part each year, however, only one or two sites per Forest District were monitored each time. The aim was to find out about the types of visitors using FE woodlands.

Counting numbers of visitors at a range of sites - around 140 mechanical counters installed on a permanent basis across all FDs. The national aim was to measure changes in visitor numbers between years at the selected sites where counters were installed. The counter data also met some local needs.

The previous visitor monitoring approach focused on a core number of highly developed sites. Generally, little was known about visitor use elsewhere and in particular about local use of woodlands.

The purpose of the All Forests method outlined here is to provide more reliable estimates of visitor numbers, visitor activities and profiles of different types of visitors across a wider section of the estate.

Methodology

In Scotland, face to face interviewing and counting of visitors is currently taking place over a three-year period, taking into account the whole range of forest types (one third of Scotland's 15 FDs will be surveyed each year).

The basis of this programme is **forest blocks** and **access points** to the forest blocks.

Blocks - (defined as an area of forest within which it is expected that most visitors will remain within one visit) are categorised as low, medium or high, based on local judgement, by:

- population levels within 15km of the site;
- perceived levels of visitor usage.

We believe that the local categorisation allows for greater stratification of forest blocks within districts and across the country than if countrywide measures were applied, whilst also allowing for comparisons to be made between blocks with similar characteristics

At a combined level, the blocks selected are representative of the range of facilities and activities available in FCS woodland, but this is not always the case at a district level.

The selection of a sample of approximately a fifth of each district's forests (typically five to ten forest blocks per district) aims to provide a range of usage, population levels and locations across the district. However, more emphasis is placed on those sites perceived as higher usage, with selection of around half of the high usage sites, a quarter of the medium usage sites and an eighth of those sites classified as low usage.

Some 'atypical' blocks have required individual consideration, for example, unusually busy blocks and blocks where there is only limited access. Where atypical blocks have been identified, we have attempted to sample them. So far, the analysis has identified one unusually busy forest block, which has been treated separately and required a slightly different sampling system.

Access points - surveying takes place at every access points in a selected block (official car park, unofficial car park, other entrance or 'permeable boundary').

Monitoring, consisting of both counts of visitor numbers into **and** out of access points (an average is used) and also the completion of visitor surveys at access points (upon exit), follows a predetermined programme and takes place whatever the weather conditions.

Monitoring takes place across the year at a variety of dates and times; data on numbers of visits was collected at each forest block over nine available time periods:

Weekdays	Saturdays	Sundays
1) Early (before 10am)	4) Early (before 10am)	7) Early (before 10am)
2) Mid (10am to 4pm)	5) Mid (10am to 4pm)	8) Mid (10am to 4pm)
3) Late (after 4pm)	6) Late (after 4pm)	9) Late (after 4pm)

Each access point has nine count observations (each lasting one hour). These count periods are spread throughout the 12-month period (including public holidays), across the three time of day periods and across each of the three 'day of week' periods. Around 60% of the counting observation periods take place during the "middle" time period (when the majority of visits take place), with the remaining 40% split between the "early" and "late" time periods.

An attempt is made to vary the hours of fieldwork conducted within each time period; for example, each time an access point has an 'early' slot it will normally be at a different hour during the early period, for example the first one could be 0800-0900 and the second 0900-1000. Similarly for 'mid' and 'late' slots.

At any one time, fieldwork is conducted at only one access point in each block. For example, on a specific day at 10am, counting can be taking place at Block 1, Access point 1 and Block 2 access point 1, but not at Block 1 access point 1 and Block1 access point 2.

Forest Districts are informed of the intended fieldwork schedule on a weekly basis. The district provides information on any forest activity that may affect the fieldwork and observations. In addition, the district provides information on any permitted events/activity that are due to take place in the survey blocks. The information includes the type of event/activity, the date, the block and the expected number of visitors.

Around half way through the one-year fieldwork period, a review is made of the data collected at each access point. At this time, fieldwork is discontinued at access points with particularly low average numbers of visitors per hour and is switched instead to the busiest access points. Although this requires an assumption that the low rates of visitors to less

busy sites are maintained for the rest of the year, the accuracy of estimated visit numbers at the busier sites is improved and a greater number of interviews are achieved.

Estimating visitors numbers and weighting

The data are used to produce estimates of total numbers of visitors at each forest block by using the following approach:

1. For each of the nine time periods, the total number of hours a forest block is ‘available’ for a visit is calculated by estimating the number of daylight hours over the whole year (excluding hours before 6.30am when it is assumed that visit numbers are negligible):

Weekdays	Saturdays	Sundays
1) Early (before 10am) 752 hours of daylight	3) Early (before 10am) 150 hours of daylight	7) Early (before 10am) 150 hours of daylight
2) Mid (10am to 4pm) 1,561 hours of daylight	4) Mid (10am to 4pm) 310 hours of daylight	8) Mid (10am to 4pm) 310 hours of daylight
3) Late (after 4pm) 644 hours of daylight	6) Late (after 4pm) 129 hours of daylight	9) Late (after 4pm) 129 hours of daylight

2. The actual number of hours of counting undertaken at each access point during each of the nine time periods (typically 3 weekdays/ 3 Saturdays/ 3 Sundays and 5 or 6 mid and 3 or 4 early or late), is then applied to the total ‘available’ hours to produce a weighting factor.
3. Each of the weighting factors is then applied to the number of counts undertaken during each of the nine time periods to produce an estimate of total visits over the 12 months.
4. By adding together the estimates for each access point, an overall estimate of annual visits is obtained for each forest block. These totals are then applied to other, similar blocks not included in the survey to produce an estimate of visits to all FCS forests throughout each forest district.

In addition to providing estimates of the total volume of visits to FCS forests, it has been possible to use the data to weight the results of the survey of visitors.

Interviewing

Interviewing of visitors is undertaken at each access point throughout the fieldwork period alongside visitor counting. Respondents are selected randomly to guarantee the

representativeness of results and the conduct of interviews 'on-site' ensures the responses are immediate, thus eliminating problems of respondent recall.

The survey takes the form of an 'exit survey' with respondents interviewed at the end of their visit to each site to ensure that their actual behaviour patterns were recorded rather than their intentions. Visitors are targeted on the basis of the next person to leave on completion of the previous interview. This procedure maximises the number of interviews completed per hour whilst maintaining the random selection of respondents.

The questionnaire is reasonably brief but covers a variety of factors, including the following:

- party composition
- visitor origin
- type of trip (local day trip, other day trip, overnight trip)
- if overnight visit then also asked place of residence and type of accommodation
- travel method
- frequency of visit
- duration of visit
- activities undertaken
- improvements to forest
- influence of forest in decision to visit area
- expenditure

Using the data

When completed, the All Forests Scotland Survey will provide a mass of information on visits to wide variety of forests across Scotland. At a localised site level, this data can be turned into useful information by examining, for example, which access points are used and to what extent and for what purpose (i.e. which activities are pursued there). We will be able to compare usage of sites across districts and the country, thereby allowing us to derive information that can feed into resource management and allocation decisions. Furthermore, the existence of expenditure data will provide evidence for potential economic valuation research both locally and across the national estate.

The survey establishes a baseline number of visits to districts and the national forest estate, which could be monitored by repeating the survey at some time in the future. In the intervening years we will maintain an ability to monitor trend via the use of mechanical vehicle counters at some higher profile sites.

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Forestry Commission website

[http://www.forestry.gov.uk/pdf/AllForestsScotland2004-2005-FinalReport.pdf/\\$FILE/AllForestsScotland2004-2005-FinalReport.pdf](http://www.forestry.gov.uk/pdf/AllForestsScotland2004-2005-FinalReport.pdf/$FILE/AllForestsScotland2004-2005-FinalReport.pdf)

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER
THE JOYS OF STATISTICS AND VISITOR MONITORING'

**MEASURING PARTICIPATION IN OUTDOOR RECREATION IN SCOTLAND:
THE SCOTTISH RECREATION SURVEY**

*Graham Neville
Advisory Officer
Recreation and Access Group
Scottish Natural Heritage*

Abstract

The Scottish Recreation Survey provides SNH and the Forestry Commission with an excellent, statistically robust longitudinal tracking dataset. It is used to achieve the Scottish Executive's key target for SNH to monitor participation in outdoor recreation following the implementation of the Land Reform (Scotland) Act 2003, and in our efforts to promote awareness and understanding of the Scottish Outdoor Access Code. While it is still a new survey, emerging trends are now available and these are being used in the development of policy on informal outdoor recreation.

Introduction – background to the survey

Scottish Natural Heritage (SNH) has been set a key target by the Scottish Executive to *"Improve public enjoyment of the countryside as measured by increases in the number of walkers visiting"*. This target is driven by the need to monitor the effect of the implementation of the Land Reform (Scotland) Act 2003, which introduces a statutory right of responsible access to most land and inland water for the purposes of recreation, access, education and some commercial enterprise. SNH aims to meet this target by running a ten-year programme of continuous monitoring of participation in, and attitudes to, open-air recreation in Scotland. The vehicle for the delivery of this is the Scottish Recreation Survey (ScRS).

SNH also makes use of the ScRS to monitor the effectiveness of a mass media campaign which has been implemented in response to a duty under Section 10 of the Act to promote understanding and awareness of the Scottish Outdoor Access Code (the Code), drive policy on open-air recreation (Enjoying Scotland's Outdoors), and provide information to support our programme of natural heritage trend monitoring and indicators on the state of the natural heritage.

SNH is joined in the Scottish Recreation Survey project by our partners the Forestry Commission, who use the national level monitoring to benchmark forest-based recreation research and to monitor trends in overall participation as well as visits to woodland in Scotland.

Methodology

The Scottish Recreation Survey technical report available from SNH (TNS, unpublished) provides additional detail on the methodology employed for the delivery of the survey. The original survey methodology was developed in a pilot project in partnership with visitscotland, the English Tourism Council, Forestry Commission and the Environment Agency. The partners commissioned TNS (then NFO System Three) to undertake the pilot study – the Scottish Recreation Day Visits Survey (SRDVS). The purpose of this work was to test the feasibility of a bespoke Scottish recreation monitoring programme, to develop a questionnaire, and to pilot methodological options available for a study of this type. In particular, it tested the use of Computer Aided Telephone Interview (CATI) and compared this with Computer Aided Personal Interview (CAPI) field survey methods. The recommendation of the SRDVS was to employ CAPI survey methods within a cost-effective omnibus survey (an omnibus survey is when an organisation purchases questionnaire space on a pre-existing commercially led national survey).

The ScRS commenced in July 2003 with the insertion of a range of questions relating to open-air recreation in the Scottish Opinion Survey, the omnibus survey run by TNS Travel and Tourism. This national household survey provides a sample of 1,000 adults (aged 16 years and over) per month (giving an annual sample of 12,000 adults). Forty-two sampling points are used across the country each month, leading to 504 points across Scotland in each annual period. The numbers of interviews achieved in each local authority area is monitored to minimise any under- or over-representation of any particular areas. Within each sampling point, a set of interlocking quotas are applied (a non-probability quota sample) to produce a number of interview respondents which is representative of the Scottish adult population. The data is weighted against the National Readership Survey (NRS) to ensure the representativeness of the sample. This sampling method produces a set of statistically robust responses.

The full questionnaire for the ScRS is large, amounting to some 19 multiple response (with precoded answer) questions. Due to the cost element of including such a long questionnaire on an omnibus survey on a monthly basis, the full questionnaire has been split into five modules, with one set (Set A) being asked every month, another set asked every two months, and the remaining three sets being asked every three months on a rotating basis. This keeps the cost element affordable while retaining the high quality tracking capabilities of a monthly survey. The survey is designed to run for 10 years, therefore giving reliable trend information on a range of outdoor recreation topics.

As a key to the use of the ScRS, SNH and the Forestry Commission have defined outdoor recreational visits as any visit made to the outdoors for the purposes of leisure or recreation. This includes, for example, visits made from home, visits to the countryside or coast as well as visits to local urban greenspaces. A key to this definition is that there is no lower time-limit on the visits reported on in the ScRS. The effect of this definition on survey information is explored later in this paper.

Innovation

As part of the monitoring of the media campaign for the Scottish Outdoor Access Code, SNH requires the ability to track recall and understanding of the range of media tools used in the campaign. This includes TV, radio and press adverts, and the Scottish Recreation

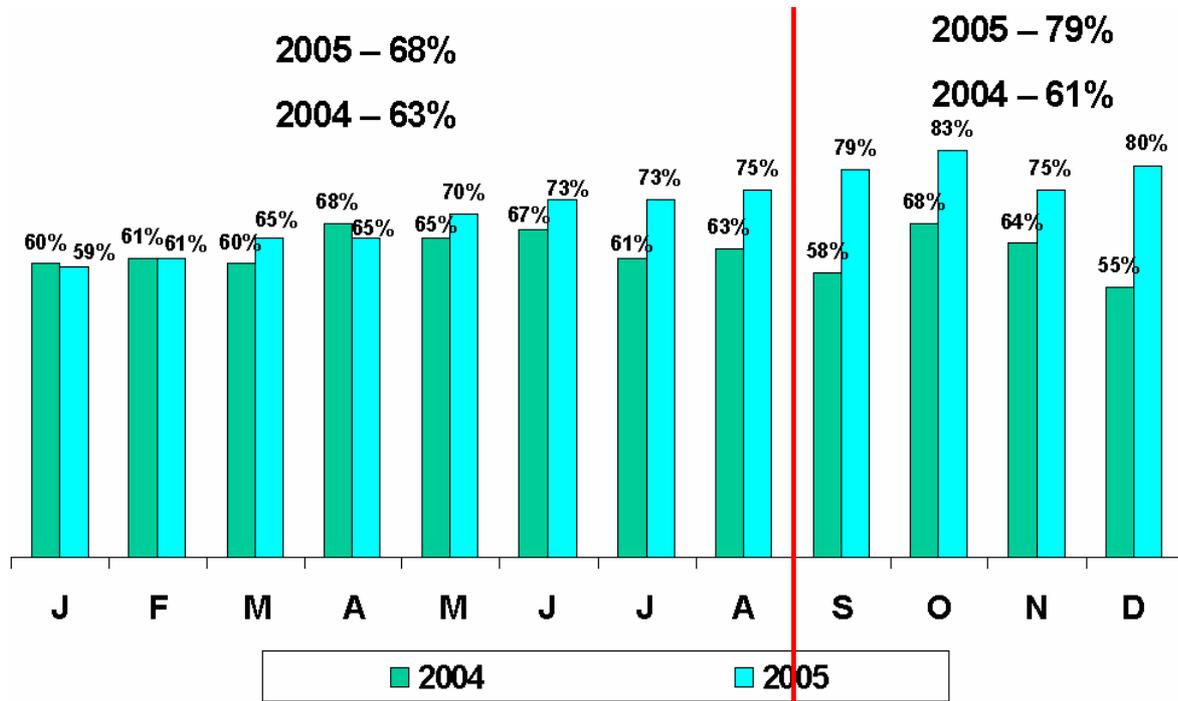
Survey has been used to track recall of these adverts. During the course of an interview, the CAPI capabilities can be used to play "mpeg" files of the TV and radio adverts, or show pictures of the press adverts. This function has been used successfully in tracking all three of our different 'scenario' based TV ads, with a three-way split of each monthly sample being shown each of the different adverts (this is achieved using the automatic routing functionality of the CAPI interview script).

A further innovation in the ScRS is the reporting of monthly data outputs using a windows-based Excel viewer file. While reasonably widely used in the private sector, this element of reporting has not before been used for visitor monitoring. This simple excel file uploads the most recent data within an accessible format, allowing basic filtering of results and providing the user with a dynamic tool for accessing trend information on an immediate basis. This is most useful for the immediate reporting of trends where annual reporting is not appropriate, and can be used to check if any individual event (for example the finding of an H5N1 – positive swan carcass in Scotland in March 2006 and the associated public response) has had any effect on participation in outdoor recreation. This is also ideal for answering queries received by SNH, which must be answered quickly.

Calibration and testing

During 2005, a review of the Scottish Recreation Survey questionnaire and methodology was undertaken as part of the tendering process for the remaining 8 years of the project. This review included making cost efficiencies in the administration of the questionnaire, streamlining some of the data collection. One of the key results of this work was to combine the first two questions, which had included an initial 'screener' question (to select those who have made any visits to the outdoors for the purposes of leisure or recreation in the 12 months prior to interview), followed by a detailed question asking those respondents who had made any visits approximately how many visits they had made in that period. It was also highlighted that it may be possible that the use of the initial screener question was providing respondents with an easy opt-out of the ScRS questions if they responded negatively. In September 2005, the change was made to combine these first two questions, asking all respondents to the Scottish Opinion Survey how many visits they had made to the outdoors in the last 12 months, with one of the frequency precoded responses being 'none'. The results of the remaining months of 2005 showed an increase in the incidence of respondents reporting that they had, in fact, made at least one visit to the outdoors in the previous 12 months. The increase reported here was higher than year-on-year increases during the first 8 months of 2005. See figure 1 for a graph displaying the information here. Therefore, the decision was taken to run a calibration exercise in 2006 and 2007 (ensuring a spread of quiet and busier months), in order to be able to accurately report on trends across the whole period of the ScRS project.

Figure 1: comparison between survey results – proportion of respondents making at least one visit to the outdoors in last 12 months – 2004 – 2005.

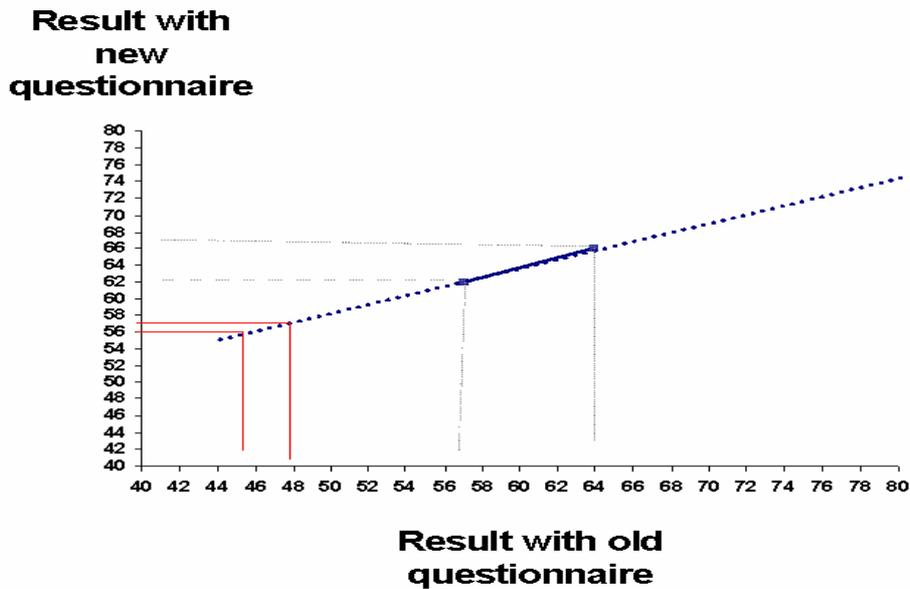


Note: The above graph outlines participation in at least one visit to the outdoors in the last 12 months, during 2004 and 2005. The vertical red line indicates the time of the questionnaire change in 2005. The comparison results above the graph outline the fact that, in the latter part of 2005, there was a greater increase in participation than in the earlier portion.

The calibration exercise has been carried out by splitting four monthly samples of the Scottish Opinion Survey, with 50% of the sample being asked the old ScRS questionnaire, including the original screener question, and the remaining 50% being asked the new questionnaire structure. This was carried out in June and July 2006, and will be carried out again in January and February 2007. Analysis of the data received from the first two control months suggests that the questionnaire change was indeed responsible for much of the larger than expected year-on-year increase in participation reported, but that this varies according to the overall levels of participation recorded (a greater difference was noted in the quieter month). Such indications suggest that the variation lies with what could be termed ‘occasional participants’, who may be more likely to have made a visit to the outdoors during a busy period (i.e. due to good weather), and so would have responded positively to the old screener question during this month. However, if they have not recently participated they may be more likely to respond in the negative.

While this work is still ongoing, it has been possible to introduce a calibration factor for the 12-month participation figure of 1.08. A calibration factor for the estimates of visitor numbers for the 4-week recall period is more complicated, but may be based on a ‘best-fit’ or regression line, where a variable calibration factor may be applied to historical data depending on the position on the regression line. See figure 2 for a graphical representation of this work.

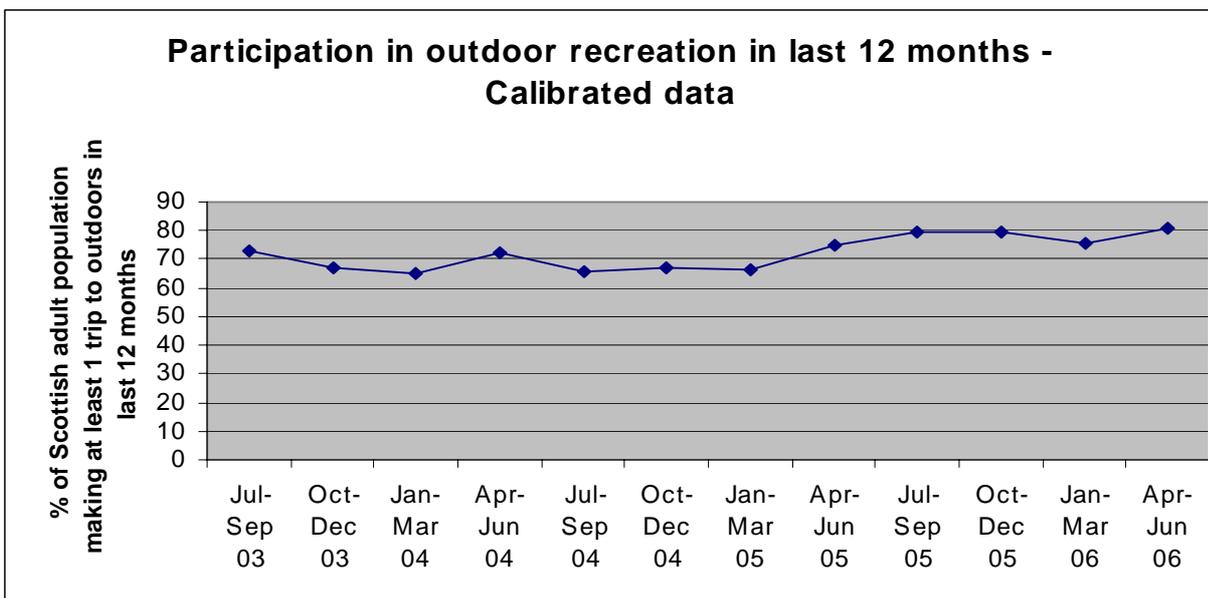
Figure 2: Regression line showing calibration factor (June and July 2006)



Results and emerging trends

Although the survey has only been running since July 2003, it has been possible to track emerging trends from the data received so far, using the calibrated data from the 12-month participation questions, and other information. One of the key trends emerging may be that, contrary to indications from some other British leisure day visits surveys, Scotland may be experiencing a slight growth in the incidence of visits made to the outdoors. However, it must be noted that the definitions of outdoor leisure and recreation used in the Scottish Recreation Survey are quite different to those used in, for example, the England Leisure Visits Survey, and therefore the two cannot be directly compared. This is also particularly the case as there has been a relatively short monitoring period so far. Figure 3 below outlines the trend in participation evident in the ScRS:

Figure 3: trend in participation in outdoor recreation



A further trend noted from the survey data is a suggested move towards a higher frequency of shorter-duration visits, made closer to home. These visits make use of less travel, particularly evident with the increase in the number of visits made on foot as the means of getting to the recreation destination (and presumably forming part of the recreational activity). These visits also involve less expenditure by the participants (driven in part by the lesser need to spend money on transportation). If this trend continues, it may be an indicator of a shift towards more environmentally sustainable outdoor recreation, where the carbon emissions associated with the visits is reduced, and will have implications for the provision of accessible outdoor recreation facilities closer to where people live.

Future of survey

The Scottish Recreation Survey is programmed to run for another 7 years, to 2013, tied to the Scottish Executive's key target. The dynamic nature of a survey such as this, with varying question modules, allows the survey partners to vary when needed, the content and frequency of the question sets. For example, it is known that in 2008 SNH will have less need for such frequent monitoring of the awareness and understanding of the access legislation and Code, as our initial Access Education and monitoring project comes to a close. Therefore, the associated question module for this tracking will cease to be asked on a quarterly basis, reducing initially to a bi-annual basis, and perhaps in the future onto an annual basis. Of course, this flexibility is also useful should there be a need to introduce new elements to the survey in the future. As long as the core questions remain the same for the ten years of the survey, long term tracking will be available within a flexible framework for the addition of appropriate short-term monitoring questions.

Conclusion

The Scottish Recreation Survey has been developed and implemented by a partnership between Scottish Natural Heritage and the Forestry Commission, providing high-resolution information on participation in outdoor recreation in Scotland which has been previously unavailable at this level of detail. The innovations and flexibility available to the survey partners via the omnibus survey run by TNS allow the use of survey methods in new areas to public agencies, including media tracking. For the remaining 7 years of the project it is likely that innovation will continue to be a feature of the ScRS.

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Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

TRAILS, TRIALS AND RESOUNDING RESULTS - HOW THE COUNTRYSIDE AGENCY HAS COLLECTED DATA ON NATIONAL TRAILS AND HOW IT HAS USED THE RESULTS

Jane Wain
National Trails Specialist
Natural England

TRAILS

Introduction

National Trails are long distance paths for walkers and in some cases, cyclists and horse riders. They pass through some of the most beautiful landscapes in England and Wales and provide opportunities for both long and short distance walks and rides.

The National Trail team in England manages ten established Trails in England, two in Wales and one, Offa's Dyke, which straddles the border between England and Wales.

The most recent National Trails – the Pennine Bridleway Way and the Cotswold Way are still under construction.

Natural England (formerly the Countryside Agency), has spent an average of £2 million each year for the last four years in managing, promoting and maintaining the established network and a further £2 million per year in creating these two new Trails.

These are not insubstantial amounts of money and evidence is needed to confirm public money has been spent wisely. From data recorded by people counters. We estimate that just over 12 million visits were made to the different Trails in 2004. We wanted to consult these people to ensure the £4m spent each year was meeting their needs and expectations.

TRIALS

Questionnaire

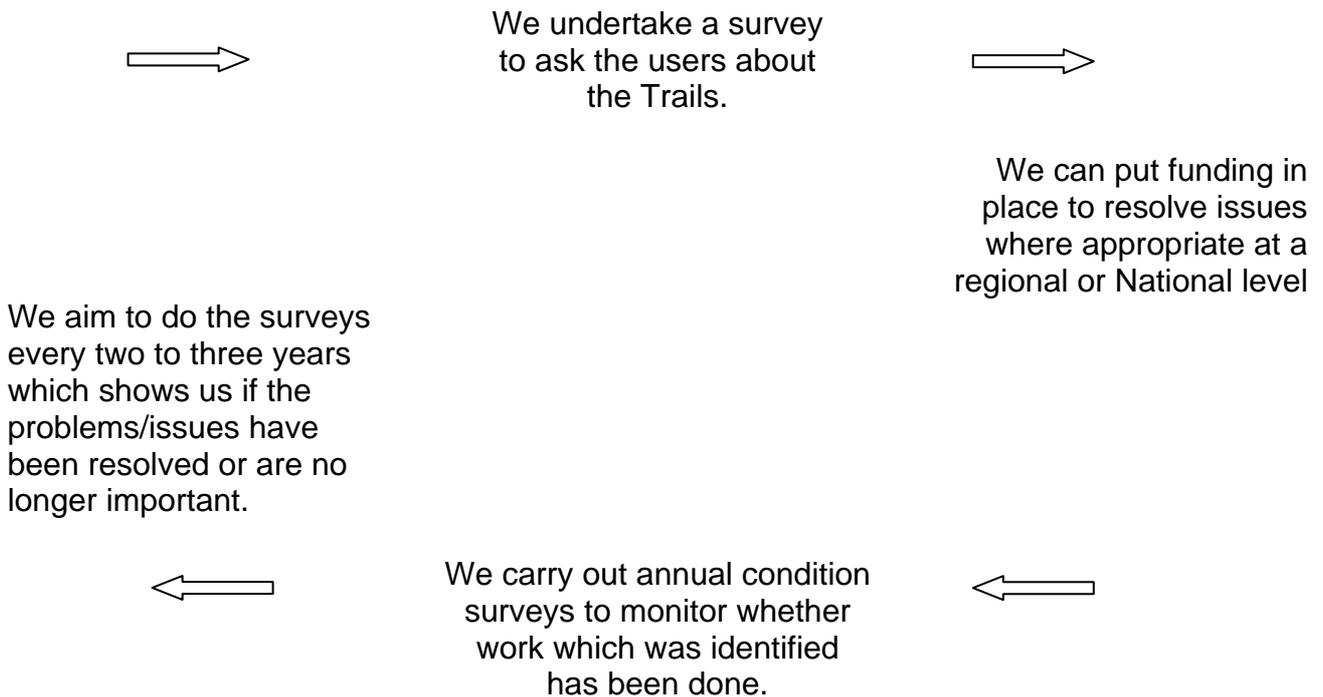
In order to consult these people we developed a questionnaire, which was subsequently validated by a marketing company.

The objectives of the survey were to –

1. help us target funding on Trail management which meets user needs
2. provide market segment and user profile information

3. provide individual Trails with management information
4. compare results with the 2003 User Survey

We had used the results from the 2003 survey to help us to set our published Quality Standards. The aim of the quality standards is to ensure that the maintenance of National Trails is to a standard that is consistent and sympathetic to the landscape through which it passes and meets the needs of the uses and which is appropriate to the their use. An effective management cycle was developed.



Methodology

We aim to have an annual web survey, which can be found on our web site (<http://www.nationaltrail.co.uk>) and a bi-annual face-to-face survey carried out by our National Trails Officers and volunteers.

The questionnaire is deliberately short to extract essential information without causing undue delay to people using the Trails.

Each National Trail Officer had the option to add two additional questions to help them manage their individual Trail.

A version of the core questionnaire was posted on the National Trail website.

This questionnaire was designed to meet the same objectives as the face-to-face interviews. In addition a section was added for those people who had expressed an interest in National Trails (by visiting the web site or by ordering leaflets, buying guide books etc.), but who had not gone on to visit a Trail. This element of the survey was designed to determine what stopped people with an interest making use of the Trails.

Due to limited resources National Trail staff, Countryside Agency staff and volunteers carried out the survey over a minimum of three days. The locations for the surveys were chosen by the Trail Officers to provide a mix of users. In all cases sites were chosen to ensure people had spent some time on the Trail before being questioned. All face-to-face interviews were carried out between July and October 2005. Trail Officers tried to choose a variety of days and times rather than three Bank Holidays or three wet Tuesday afternoons.

RESOUNDING RESULTS

Results

We received 1331 questionnaires in total. 328 web returns and 1003 face to face. 123 of the web responses came from people who had visited the National Trail website but had not actually used any of the Trails. Naturally we would have liked a greater number of responses to provide more robust data and were especially disappointed with the web-based survey, but this is performing better this year.

It is all too easy to have a pile of information from a survey with loads of interesting information which you never do anything with.

The design of the questionnaire is important here – why are you asking a question? What information will you get back? And what will you do with that information?

A classic example here for us was the tick box male or female?

Although this sounded a sensible question - do we have lone female walkers or are all lone walkers men – could we improve things to make women feel less vulnerable etc. The way we asked the question was wrong. We wanted to know what the gender make-up of the party was. Usually it was the male in the party who answered the questions and therefore we got an inaccurate proportion of men and women.

Don't ask questions unless the answers provide useful data.

In our original survey we asked 'are you employed?' – what difference does this make?

Also don't ask a question if it is about something you have no influence over? E.g. the weather!

Use of Data

1. We produced an internal report outlining the results and a summary. This is now published on the website.

After the user survey in 2003 we published a leaflet called *National Trails, National Treasures* and this was updated this year with the 2005 data we collected. Copies of this leaflet can be ordered or downloaded from the website. We used quotations from the free text questions on the questionnaire in this leaflet and to promote the Trails generally.

This makes an attractive general leaflet to hand out to people, which hopefully encourages more people to use the Trails.

2. In 2004 The Agency commissioned a study to look at Benefit Cost Ratios⁴, which are a measure of the extent to which economic returns exceed (or fail to meet) economic costs. The results of the User Survey provided data that could be used in this work.

3. The data collected is also useful to our National Trail Officers. They have used the results to inform

- Management Strategies
- Economic Impact and Trail User
- Trail Newsletters
- Planning Applications
- Talks and presentations
- Prioritisation and initiation of projects on the Trails

⁴ (Benefit-cost ratios (BCRs) are a measure of the extent to which economic returns exceed (or fail to meet) economic costs. The purpose of establishing BCRs is to:
give funders confidence that their money will be invested wisely;
increase funding for the Trails by presenting information on returns from those investments to funding agencies; and
improve the allocation of resources within the National Trails by using benefit-cost ratios in conjunction with Trail Officer/Management decision-making.)

Countryside Recreation Network Seminar

'KNOWING YOUR CUSTOMER THE JOYS OF STATISTICS AND VISITOR MONITORING'

CONCLUDING REMARKS

Wendy Thompson

It has been fascinating to hear from the speakers today about their direct experiences of running a variety of surveys. Several issues have emerged as themes through-out the day:

- Clearly knowing the purpose of the survey or why you are monitoring is essential. Having specific questions to address will help to focus the questionnaire or survey technique more effectively. Alternatively, trying to cover too many issues or questions in one survey can be counter-productive.
- It is important to keep definitions under review and they must be clearly understood. Words that mean one thing to professionals can mean something completely different to the public. And over time the meanings of words, phrases and concepts change.
- We need to design surveys which reveal more about motivations or triggers to do outdoor recreation. Many of our surveys currently count visitors or measure what people currently do. Few surveys measure attitudes and this is something which would help to inform decisions about how to promote the outdoors and provide better information.
- The possibility of building information up from local surveys, such as from community bench marking panels, to provide national data sets.

I hope that participants have heard things to inspire them and perhaps also things to avoid because that is what today has been about. And finally I would like to thank all of the speakers today for presenting what could have been a very dry topic in such an interesting and practical way.

APPENDIX A

**Knowing Your Customer
The Joys of Statistics and Visitor Monitoring
PROGRAMME**

- 09.30 Registration and refreshments**
- 10.00 Welcome by Chair**
Wendy Thompson, Natural England
- 10.10 Overview of Assessing National and Regional Surveys**
Professor Nigel Curry, University of the West of England
- 10.35 Assessing the Business Case Needs of a Combined National Visitor Survey in Wales**
Sue Williams, Countryside Council for Wales and Duncan Stewart, TNS Travel & Tourism
- 10.55 The Active People Survey - Evidence supporting improved strategic planning in the delivery system for sport**
Nick Rowe, Sport England
- 11.15 Refreshments**
- 11.40 UK Surveys and their Application to Local Management Decisions**
Angela Groves, British Waterways
- 12.00 How to Understand Customers to Support Economic and Social Policy**
Paul Bivand, Centre for Economic and Social Inclusion (CESI)
- 12.20 Question and Answer Panel Session**
- 12.50 Lunch**
- 13.35 Monitoring National Waymarked Ways in Northern Ireland**
Ian McClelland, Countryside Access and Activities Network
- 13.55 Local Site Based Surveys**
Ian Bamforth, Worcestershire County Council
- 14.15 Monitoring from the Start - Assessing the use of open access land**
Jo Hall, Natural England
- 14.35 Refreshments**
- 14.50 Measuring Participation in Outdoor Recreation and Visits to Woodland in Scotland**
Neil Grant, Forestry Commission and Graham Neville, Scottish Natural Heritage
- 15.10 Trails, Trials and Resounding Results - How the Countryside Agency has collected data on National Trails and how it has used the results**
Jane Wain, Natural England
- 15.30 Question and Answer Panel Session**
- 15.55 Summary (Chair)**
- 16.00 Close**

APPENDIX B

BIOGRAPHIES OF SPEAKERS

**Knowing Your Customer
The Joys of Statistics and Visitor Monitoring
The Priory Street Centre,
York
25th October, 2006**

CHAIR

**Wendy Thompson
Senior Specialist,
Outdoor Recreation and Access Policy Team
Natural England**

Wendy works for the newly created Natural England as a senior specialist with responsibility for recreation and access. She previously worked for the Countryside Agency where her most recent responsibilities were to develop a forward-looking strategy on outdoor recreation for Natural England. Prior to this she spent several years as the Countryside Agency's Rights of Way specialist dealing with the Countryside and Rights of Way Act and the access issues emerging during the Foot and Mouth outbreak in 2001. During her career at the Countryside Agency and before that the Countryside Commission Wendy has also provided policy expertise on national trails, tourism, designated areas and town and country planning. As a geography graduate she sees herself as a generalist with a strategic overview of environmental matters.

SPEAKERS

Nigel Curry University of the West of England

Professor Nigel Curry is Associate Dean in the Faculty of the Built Environment at the University of the West of England and Professor of Countryside Planning. He has held visiting research posts at the Queen's University of Belfast, the University of Lausanne, Switzerland and the Open University and in 2000 – 2001 he held a Leverhulme Fellowship at the University of Lincoln, New Zealand to explore rights of access for outdoor recreation in New Zealand.

He was a Secretary of State appointment to Dartmoor National Park Authority (1997 – 2003) where he was Chair of the Visitor Services Committee and is currently Chair of the South West of England Regional Rural Research Priorities Board. He has undertaken over 40 research projects into countryside recreation and access and his book *Countryside Recreation, Access and Land Use Planning* was published by E and FN Spon in 1994.

Sue Williams Countryside Council for Wales

After working as an environmental consultant and then as a Project Officer at an urban nature reserve, Sue Williams gained an MSc in Environmental Sustainability from Huddersfield University in 1997. For the following 6 years she worked as a researcher examining a range of environmental, recreation, and rural transport issues.

In 2003, Sue moved to the west coast of Scotland to work on Argyll and Bute Council's access project and to prepare for the implementation and delivery of the Land Reform (Scotland) Act. In 2005, she started at CCW as a Recreation Policy Officer, drawing on her research experience of access and knowledge of recreation in both England and Scotland. Since then, part of her work has involved reviewing previous survey data on recreation, and the development of an Outdoor Recreation Survey for Wales.

Duncan Stewart TNS Travel and Tourism

Duncan Stewart graduated from Napier University, Edinburgh with an Honours degree in Tourism Management in 1997. He joined TNS in the summer of 1998 from the research department of Yorkshire Tourist Board and is now a Managing Consultant.

Since joining the company, Duncan has undertaken a great deal of quantitative and qualitative research. He has managed numerous of the outdoor recreation studies undertaken by TNS Travel and Tourism, including all of the studies undertaken on behalf of the Forestry Commission since 2002, projects for SNH, British Waterways, the Scottish Executive and the Woodland Trust.

Nick Rowe MPhil (Edin) BA Hons Sport England

Educated at Oxford Polytechnic, Edinburgh University and the University of Texas, Nick joined the Great Britain Sports Council Research Unit in 1983. In August 2003 Nick was appointed Head of Research at Sport England, the strategic leader for sport in England.

Nick's specialist area is in 'sport and social policy' research. He has been responsible for managing many large research studies including the Allied Dunbar National Fitness Survey and the three National Surveys of Young People and Sport in England. He was the author of 'The Value of Sport' (1999) that set out the broader social and economic case for investment in sport and is leading current work at Sport England on the development of a web based 'Value of Sport Monitor'. Nick currently has responsibility for managing the Active People Survey – the largest single client market research project commissioned in Europe – and has lead responsibility for delivering Active People Diagnostic – a sophisticated online reporting and analysis tool.

Nick was Chairman of the Council of Europe Research Expert Group on Young People Sport and Ethics from 1990 to 1993 and is currently a Co- Director of the COMPASS Project seeking to harmonise measures of participation in sport across European countries.

Angela Groves British Waterways

Angela is responsible for BW's insight programme. She manages BW's annual customer satisfaction surveys as well as the Inland Waterway Visits Survey monitoring the volume and type of customer visits. Angela works closely with BW's regional business units, assisting and advising on *ad hoc* projects, helping them make the most of the information available, and where necessary, standing with a clip board and conducting visitor surveys herself like at the annual Crick Boat Show.

Prior to joining BW, Angela worked for food and grocery think tank IGD. She conducted qualitative and quantitative research covering a range of topics such as health and nutrition, food labelling, demand for local food and general shopping patterns, for clients such as Muller Dairies, Defra, the Countryside Agency, Cadbury's, and the Scotch Beef brand. Before IGD, Angela spent time working for Campden and Chorleywood Food Research Association, and completed a PhD at Reading University investigating British consumers' attitudes towards British food.

Paul Bivand
Centre for Economic and Social inclusion (CESI)

Paul Bivand is Head of Analysis and Statistics at *Inclusion*, the Centre for Economic & Social Inclusion. *Inclusion* is an independent social enterprise offering research and policy services, tailored consultancy etc. The key areas of social policy expertise are welfare to work, learning and skills, regeneration, homelessness, criminal justice and social exclusion. *Inclusion* works with the Government, the public sector, interest groups and business to develop policy and strategy, and to implement ideas.

Paul has worked for *Inclusion* since 1998, and previously in research posts for the University of Essex, the Royal College of Nursing, the Employers' Organisation for Local Government, Incomes Data Services and a number of other organisations. Paul holds an MBA from the University of Liverpool and an MA from Cambridge University.

Ian McClelland
Countryside Access and Activities Network

Ian McClelland currently works as a Research and Monitoring Officer with the Countryside Access and Activities Network (for Northern Ireland). A significant proportion of his work includes the undertaking of visitor surveys and visitor monitoring in relation to walking, cycling, canoeing and horse riding trails across Northern Ireland. Prior to this post, Ian was employed as a Researcher within the university sector where his work focused on European Public Policy and European Structural Funds. Before this he was employed as a Researcher within the Northern Ireland Assembly.

Ian Bamforth
Worcestershire County Council

Ian Bamforth is the Countryside Manager for Worcestershire County Council's Countryside Service, with over 20 years experience in the Countryside and Recreation Management industry. Worcestershire's Countryside Service undertakes a broad range of local visitor surveys and statistical research in relation to its management of and with visitors to its sites and the wider countryside.

Jo Hall
Natural England

I work for the newly formed non- departmental public body 'Natural England'. I graduated with a social science degree and have since obtained a professional marketing diploma through the Chartered Institute for marketing. My previous work has been diverse, starting out in the voluntary sector implementing strategic campaigns policy through researching and writing public campaigns documentation for Mencap, and later moving into the rural policy remit working for Defra's countryside division team in Bristol. I Joined the

Countryside Agency in 2002, becoming part of the implementation team delivering CROW, from carrying out national consultation, through to mapping, partnership working and appeals. I now manage a programme of monitoring and research in order to identify impacts and outputs of the new right of public access, providing information to enable decision making across the new organisation.

Neil Grant Forestry Commission

After leaving the joys of Bolton behind, I completed an Economics & Statistics degree course at Edinburgh University in 1997. After an arduous journey through the strange land of corporate pensions, I landed in the green fields of the Environment and Rural Affairs Department of the Scottish Executive in 2004. After counting enough sheep to make the whole of Scotland nod off, I commenced a two-year secondment period with the Forestry Commission earlier this year.

Over the last couple of years, I've managed, outsourced, analysed and reported on a variety of statistical surveys and, amongst other activities, currently take the lead on all aspects of measuring the availability and usage of woodland recreation opportunities at Forestry Commission sites across Great Britain.

Graham Neville Scottish Natural Heritage

Having counted too many stones (sorry, glacial deposits) during an undergraduate degree in physical geography at Glasgow University, I went on to complete an MSc in Rural Environmental Management at Aberdeen University. Before joining Scottish Natural Heritage as European and International Officer I worked with Martin Price at the Centre for Mountain Studies. Since January 2004 I have been part of Recreation & Access Group in SNH, with the delivery of the Scottish Recreation Survey my main job focus, as well as being activity contact for horse riding and canoeing – never a combination which is commonly heard together. I recently moved to the shiny new headquarters of SNH in Inverness.

Jane Wain Natural England

Jane joined the Countryside Agency in 2000. Before joining the National Trail Team she worked with the Open Access Team responsible for mapping areas of open country for the Countryside and Rights of Way Act 2000 which gave people the right to walk freely across areas of mountain, moor, heath and down.

She joined the National Trails Central team in Cheltenham in January 2005. The central team provides support for marketing of the family of National Trails, develops policy to support National Trails and acts as a liaison point for National Trail Officers, partners and the general public.

APPENDIX C

APPENDIX D