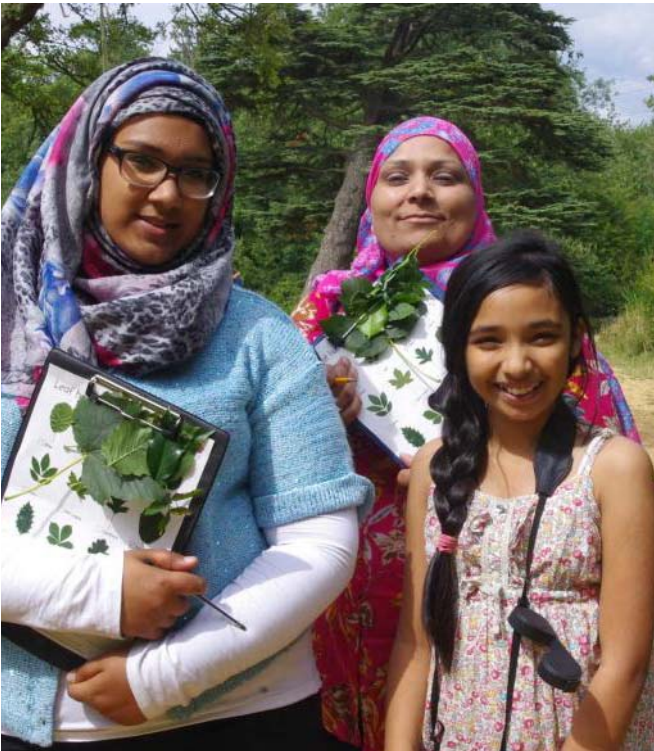


Visitor Survey 2013 Full Report



1. Introduction

Having now completed its fourth year, the Epping Forest Visitor survey follows a well-established methodology and has produced significant findings, helping the City of London (CoL) to manage the unique and varied landscape of Epping Forest in a more effective and proactive manner as the impacts and pressures on the Forest change.

The visitor survey consists of two components:

- the observation survey enables us to produce and compile objective data on our visitors at different sites around the Forest, such as age, gender, ethnicity and activities
- the questionnaire survey allows our visitors to express their views and opinions about the Forest and how it is managed.

Both elements of the survey provide excellent and essential information which is complemented by the knowledge and skills of our dedicated staff and volunteers.

2. Observation Survey

During the 2013 observation survey, volunteers and staff counted and mapped the location of 1,395 visitors across eight sites over 60 hours. Following a plotted route around each site, surveyors noted information including the location of all visitors. Eight surveys were conducted on each site, coordinated to cover weekends and school holidays as well as different times of day. Using these statistics and assuming an average year-round figure of 12 hours per day suitable for visits, a calculation of the estimated visits per annum to each site can be made.

Using the figures obtained from the last three survey years, the new estimated total number of visits per annum is **4.4 million**.

With the addition of the survey figures for the 17 sites previously observed, we now have observed visit figures for 25 sites within Epping Forest (see Table 1 and figure 10). To the combined total of these (actual and still estimated figure of 4,122,777) we have added the number of people we know to have attended events and activities and visited the website during 2013 (figure 2), to calculate our latest rounded up estimate of 4.4 million visits.

Additionally, for the first time in the history of the survey, we have repeated the survey on a site which has received major capital investment with funding from Heritage Lottery. First surveyed in 2010, Connaught Water has since benefitted from improvement works during 2012. By surveying the site again this year, we will be able to make some inferences about the success or otherwise of these works. We will repeat surveys periodically, particularly at sites where there have been significant changes as well as surveying the remaining five sites, which have not had an initial survey. This will give us more accurate statistics for the whole Forest.

Table 1: Estimate of Total Forest Visits at end 2013 (excluding events and web hits)

Site Name	Observed visits pa	Survey Year	Region	% of total visits
Ambresbury Banks	74,547	2010	North	1.8
High Beach/Pillow Mounds	279,062	2010	North	6.9
Wanstead Park	216,906	2010	South	5.3
Chingford Plain	229,376	2010	Centre	5.6
Wanstead Flats	395,263	2011	South	9.7
Hollow Ponds	429,420	2011	South	10.5
Fairmead Bottom & Almshouse Plain	256,740	2011	Centre	6.3
Bury Wood	166,680	2011	Centre	4.1
Loughton Camp	63,195	2011	Centre	1.6
Lower Forest	30,540	2011	North	0.7
Bush Wood	167,908	2012	South	4.1
Highams Park	72,528	2012	Centre	1.8
Pole Hill and Yardley Hill	41,129	2012	Centre	1.0
Barn Hoppitt	177,484	2012	Centre	4.4
Strawberry Hill Pond Area	147,749	2012	Centre	3.6
Lords Bushes & Knighton Woods	116,404	2012	Centre	2.9
Honey Lane Quarters	54,203	2013	North	1.3
Wake Valley	41,364	2013	North	1.0
Hangboy Slade & Jacks Hill	56,176	2013	North	1.4
Connaught Water*	330,698	2013	Centre	8.1
Woodford Green	283,270	2013	Centre	7.0
Whitehall Plain & Hatch Forest	72,818	2013	Centre	1.8
Gilbert Slade	76,663	2013	South	1.9
St Thomas's Quarter	32,654	2013	North	0.8
Great Monk Wood	50,000*		North	1.2*
Warren Plantation & Epping Thicks	75,000*		North	0.7*
Chingford Golf Course	50,000*		Centre	1.8*
Fernhills & Trueloves	30,000*		Centre	0.7*
Warren Hill	30,000*		Centre	0.7*
Walthamstow Forest	75,000*		South	1.8*
TOTAL	4,122,777			*estimate

*Original survey at Connaught Water conducted in 2010. Discussed further in 3.1

Table 2: Visitor Statistics for 2013 compared with 2011 and 2012

Event type	Number of participants		
	2011	2012	2013
Events from Events Diary	11,900	13,090	13,651
Visits to the Field Studies Centre	23,000	22,141	22,304
Visits to Suntrap	12,745	12,794	12,766
Events led by the Centenary Trust	3,600	3,358	1,508
Discovering Epping Forest sessions	4,500	4,500	0
Family Learning Events (nine events a year)	2718	3011	3514
Visits to the Chingford Hub	23,219	36,573*	73,762
Visits to the Epping High Beach Visitor Centre	28,560	19,702	10,255
Visits to The Temple	12,218	10,906	10,037
HLF Forest Introduction Events	701	692	360
Visits to Chingford Golf Course	24,000	26,629	21,408
Football (pitch numbers reduced in 2012)	73,414	65,604	68,245
Web hits	51,094	73,764	95,741
TOTAL	271,669	292,764	333,551

* The View visitor centre closed for 6 months in 2012 for redevelopment

3. 2013 Results

3.1 Connaught Water

Figure 1: Change in observed visitor ethnicity at Connaught Water 2010-2013 compared to 2011 Census data for Forest centre

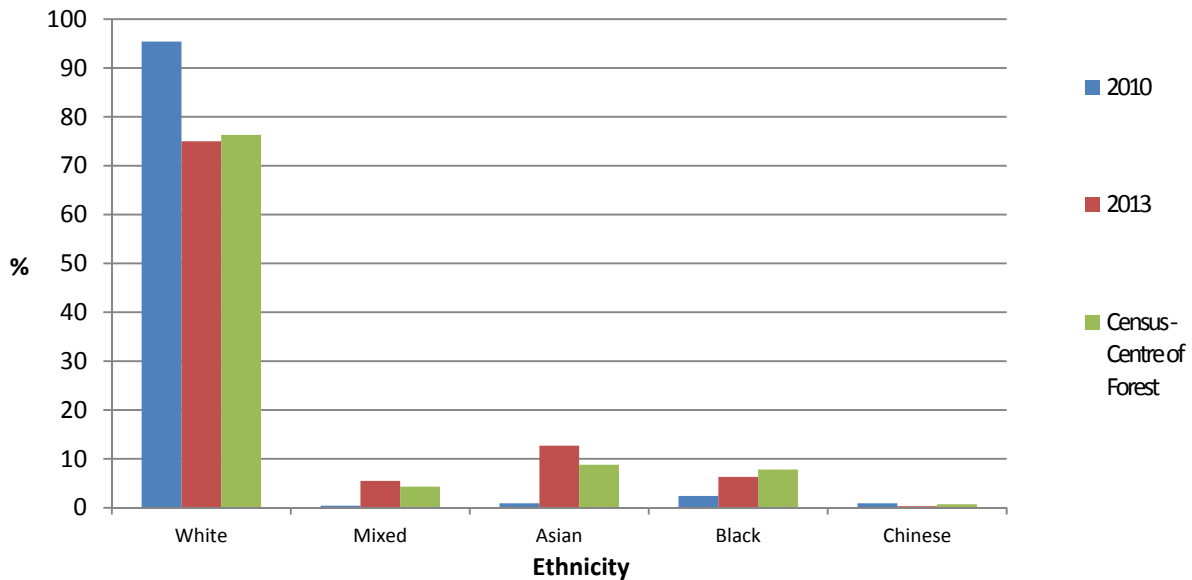
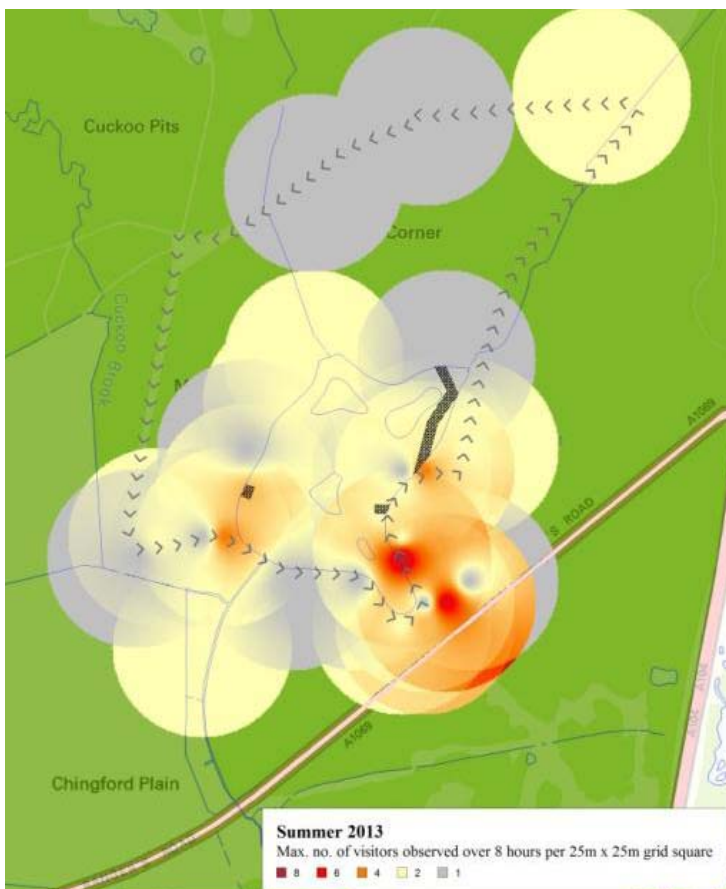


Figure 2 – Density distribution of visitors over 65 at Connaught Water



Connaught Water is a man-made lake and a popular visitor destination in the centre of the Forest, only 600m from facilities at The View visitor centre. As part of the Heritage Lottery funded Branching Out project, the site underwent a series of improvements for visitors in 2012. When originally surveyed in 2010, Connaught Water returned an annual visit estimate of 205,469. The 2013 estimate of 330,698 therefore represents a significant increase in visits of nearly 61%. A range of factors, such as the weather, can influence the final visit estimate and it was also relevant that a particularly large scout group was visiting the site during one of the survey dates. However, the main reason for the increase is likely to be from improved access, increased publicity and better facilities such as picnic tables resulting from the capital works.

Improvements to the car park and access path and the addition of a new boardwalk and fishing platforms have enhanced this honeypot destination on the Forest for a greater number of visitors. Figure 1 shows the observed ethnicity of visitors to Connaught

Water in 2013 survey reflecting much more closely the 2011 census data for the population within 2km of the forest boundary than the 2010 survey. Connaught water is becoming a destination for a much more diverse visitor profile, better reflecting the local community.

Peak visitor times at Connaught Water remained at weekends between 2pm and 3pm and the age distribution followed the census data quite well but with an increase in those 15 and under on the 2010 survey.

Improvements at Connaught Water also increased and upgraded seating options around the site, making the site more accessible and practical for older and disabled users. The 2013 survey shows almost double the level of visitors observed sitting around the site and figure 2 also illustrates the benefit of these provisions, with the 'hotspots' of over 65 visitors grouped around seating areas. Disabled users were at around 2.1% of visitors to Connaught Water, higher than any other site surveyed this year.

3.2 Gilbert Slade

Figure 3 – Cyclists and all visitors at Gilbert Slade

With an annual visit estimate of 76,663, Gilbert Slade is situated in the Southern part of Epping Forest and is immediately south of the busy A406 and Waterworks roundabout. To the east and west are densely populated residential areas and the results indicate that it is perhaps best viewed as an amenity for the local community rather than as a destination for visitors. This can best be illustrated by the high level of visitors with a dog (35.5%) and also the use of the site by runners (4.7%), cyclists (18%) and young people playing (6%). Under 20's and over 65's were underrepresented at this site in comparison with the census data, with the majority of visitors being in the 20-44 age bracket. As with other parts of the Forest, visitors were predominantly white (90%), though given the location of the site in the south of the Forest, this is perhaps a surprise.



3.3 Hangboy Slade

In the northern part of the Forest, Hangboy Slade and Jacks Hill contain large areas of pollarded Beech, Hornbeam and Oak trees alongside smaller areas of heathland. The site is bordered by Debden campsite to the east as well as being in close proximity to Loughton golf course and the Deer Sanctuary.

Results showed the site to be less well used, with 56,176 estimated visits per annum. The site was three times busier during the weekend and visitors were largely white (96.6%) and between 20 and 44 (63.6%). Cycling was a hugely popular activity on this site (33%) along with running (17%). There were also a large number of young people playing on the site and climbing trees (14.8%), though this result was influenced by one large group during a weekend survey, as was the cycling result. For sites with low visitor numbers, one such large group can exert a larger influence on final results. The busiest areas of the site were the Broad Strood car park and confluence of Ditches Ride and Green Ride (figure 4). During the survey, four people were observed mushroom picking and two using metal detectors, both activities against the byelaws of the Forest. This illustrates some of the difficulties which can be encountered by those managing the Forest and we continue to work hard to educate the public about the safe and responsible use of our sites. You can find out more about our byelaws at our website www.cityoflondon.gov.uk/eppingforest.

Figure 4 – Cyclists and all visitors at Hangboy Slade



3.4 Hatch Forest and Whitehall Plain

Figure 5 – Dog walkers and all visitors at Hatch Forest and Whitehall Plain



Hatch Forest is an area of Hornbeam coppice through which the Ching River flows with a sports ground to the west and Woodford Golf Course to the south. To the north of this is Whitehall Plain, an open grassland area with some stands of scrub and gorse that links on to the popular Barn Hoppitt area. The site returned a slightly lower than expected visit estimate of 72,818 visits per annum, with weekend visits three times higher. The use of the site by cyclists (39.9%), runners (11.6%) and dog walkers (29%) shows the varied use of the site for recreational and amenity activities. As with previous surveys, figure 5 shows the visits by dog walkers mainly using the open grassland areas of the site. Visits to the site by those under 20 were significantly lower than the local census data and there was a gender disparity with 65.2% of visits by males.

3.5 Honey Lane Quarter

Figure 6 – Density of all visitors at Honey Lane Quarter



Another site in the north of the Forest, Honey Lane Quarter is a steeply-sloping west-facing site consisting of mainly pollarded woodland with a grassy plain to the south. The site has two well surfaced rides and a prominent viewing point as well as car parks at the northwest and south of the site.

The site has a low annual visit estimate of 54,203 despite being close to the hugely popular Pillow Mounds and High Beach area. Again, it is over three times busier at weekends. Cycling was hugely popular at this site (35.2%) and it also showed a good diversity of visitors, 22% of which were Asian. The site was slightly underused by those under 20.

Figure 6 demonstrates how visitors tend to stick to the surfaced rides and paths around the Forest, with very few people using the unsurfaced tracks in woodland areas in the northern part of the survey route.

3.6 St Thomas Quarter

Figure 7 – St Thomas Quarter visitors by various user types

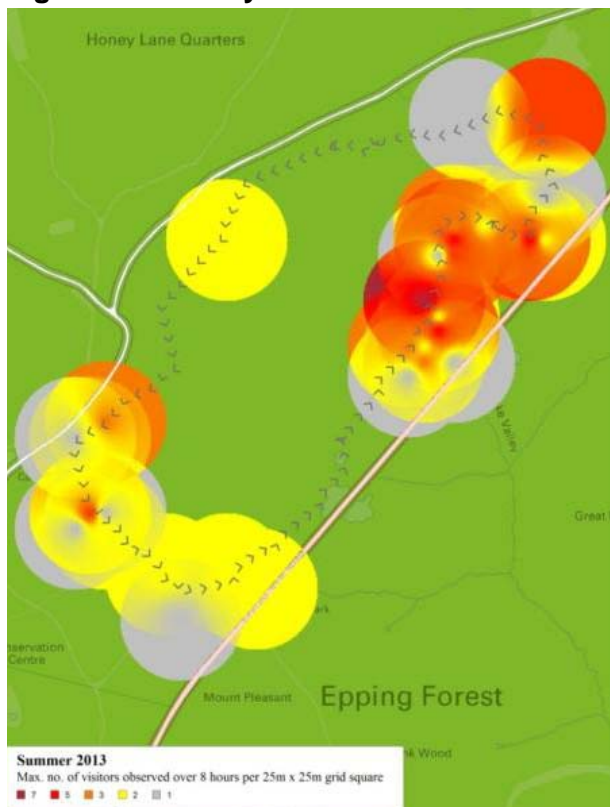


To the north of Honey Lane Quarter, the mature beech woodland of St Thomas Quarter has a very low annual visitor estimate of 32,654. With such low visitor pressure, the site provides a refuge for fallow deer. With a riding school and stables nearby, the site is popular with horse riders (15.3%) and the presence of cyclists (22.2%) and visitors with dogs (15.3%) as shown in figure 7 has the potential to result in conflict. 34.7% of observed visitors are under 20, higher than census data, and presumably as a consequence of the nearby riding school, as the majority of under 20s were also horse riders. The ethnicity of observed visitors was also quite diverse compared to similar sites in the north of the Forest.

The Lodge Road car park here has been closed intermittently to discourage the occasional instances of fly-tipping at this site, which may have further lowered the visitor numbers.

3.7 Wake Valley

Figure 8 – Density distribution of all visitors at Wake Valley

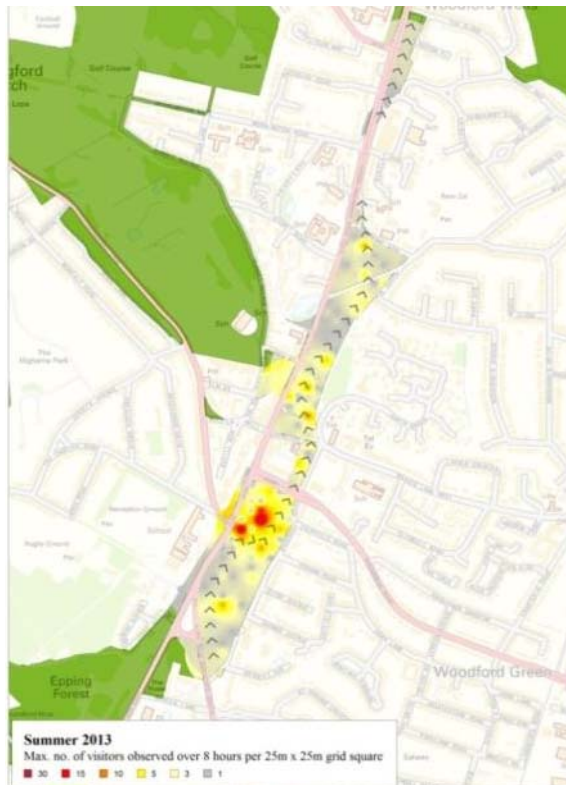


A mosaic of beech wood and heathland with a number of ponds and an estimate of 41,364 annual visits, Wake Valley is of a similarly low level of visits to the nearby Honey Lane Quarter and St Thomas Quarter. The highest areas of use were around the two car parks, at Sunshine Plain and Wake Valley Pond, as shown in figure 8. With no surfaced paths through the majority of this site, it can be difficult for visitors to traverse some areas, especially near to ponds or in wet weather.

Visitors were again mainly white, but with an age range close to the census. Fishing and sitting were popular activities with people sitting around Wake Valley Pond or on Sunshine Plain enjoying picnics in the height of summer. The site was also used by bird watchers and the more adventurous cyclist.

3.8 Woodford Green

Figure 9 – Density distribution of all visitors at Woodford Green



Woodford Green is a stretch of well-used amenity grassland running alongside the popular Woodford High Road. The site returned a high annual visit estimate of 283,270 and the majority of this use appears to be functional. However, recreational use is more apparent at the weekend. This is reflected in the busiest visitor period, 7.30am – 9am on weekday mornings. This consisted mainly of people crossing the Green on their way to work and the nearby schools, and Woodford County High School for Girls in particular. 5-15 year olds at this time of day accounted for 11.7% of the total visitor count for the whole eight hour survey period. 46% of all observed female visitors were seen during this time period, and a more ethnically diverse population was also recorded at this time.

At weekends, the cricket pitch accounted for the majority of visits with 24.2% of all visitors either watching or playing. Figure 9 shows the high distribution of visitors on and around the

cricket pitch and of those through-routing to work or school.

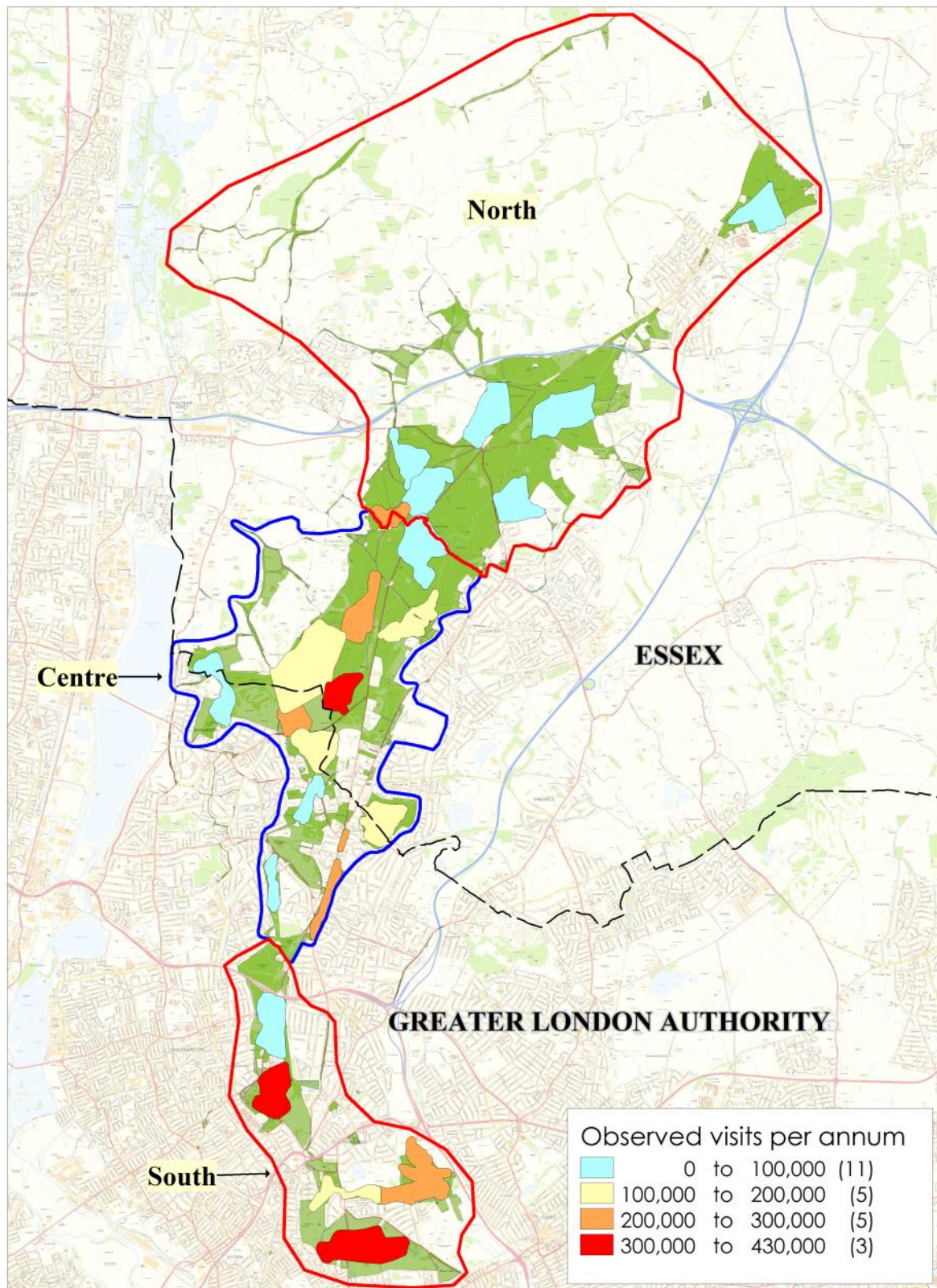
3.9 Whole Forest data

The results of the last four years of the survey can now be combined to show relative footfall, as shown in figure 10. Areas to the south of the Forest, with a much higher local population, are predictably popular as are areas around honeypot sites such as Connaught Water, High Beach and the Chingford Hub. Most sites in the north of the Forest are low in visit numbers, a function of their remote nature, reduced accessibility by public transport and the sparser population in these areas.

Using the three geographic regions of the Forest, the south is shown to have the densest visitor distribution with 3118 visits per annum per hectare of space. This contrasts to the north, which receives 727 visits per hectare. The central area accounts for around 48% of all visits to the Forest and combines good transport links with honeypot destinations, facilities and an engaged and involved local population (see figure 12 for location of respondents to the 2013 questionnaire).

The use and popularity of honeypot destinations on the Forest represents the success of visitor management measures as larger numbers of people are attracted to sites with improvements and facilities such as sites around the Chingford Hub. Visits to Wanstead Flats, Wanstead Park, Chingford Plain, Connaught Water, High Beach Pillow Mounds and Hollow Ponds account for 46% of all visits. Increased seating and better paths at Connaught Water for example make these sites much more resistant to erosion and damage from higher footfall than other more sensitive sites would be and therefore such developments can be seen as helping to conserve the wider forest by attracting visitors around these locations.

Figure 10 – Visit estimates per annum on each surveyed site around Epping Forest



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4. Observation Survey Visitor Profiles

Previous surveys have shown that those living within 2km of the edge of the Forest comprise at least 95% of all visitors. Using 2011 census data for Wards with at least 75% of their area within this boundary and dividing this data into the distinct areas of the north, centre and south is a particularly useful tool for comparing the ethnic diversity of each sector. Table 3 shows the big variations and differences between the local communities in each area and compares them to the total observed results from the four years of the survey so far. Most noticeable is the total population, which is almost five times larger in the south than the north.

Table 3: The 2km Census data catchment profile – comparisons between North, Centre and South of the Forest

	Census				Observation survey
	North	Centre	South	Whole	2010-13
Male	48.9%	50.3%	50.2%	50.1%	58.1%
Female	51.1%	49.7%	49.8%	49.9%	41.9%
0-4	6.4%	6.6%	8.1%	7.5%	4.9%
5-15	11.5%	12.2%	12.3%	12.2%	11.9%
16-19	5.8%	6.2%	6.0%	6.0%	8.8%
20-44	33.1%	34.2%	45.8%	41.3%	47.1%
45-65	26.8%	25.4%	18.9%	21.5%	20.1%
over 65	16.5%	15.4%	8.9%	11.5%	7.2%
White	92.0%	76.3%	37.5%	64.7%	82.3%
Mixed	2.2%	4.3%	4.4%	3.7%	2%
Asian	2.0%	8.8%	39.6%	20.2%	8%
Black	3.0%	7.8%	14.3%	8.6%	6.6%
Chinese	0.4%	0.7%	1.0%	0.8%	0.6%
Other	0.4%	2.0%	3.2%	2%	0.6%
Disabled/limited by illness	16.7%	16.0%	14.0%	14.6%	0.5%
Total Population	62,634	124,743	307,961	495,338	N/A

By looking at the data recorded for the eight 2013 survey sites we can examine how closely these follow the local census data as shown in table 3. This can help highlight areas popular with different visitors. For example, table 4 gives a brief overview of visitor profiles for the eight sites and shows that while some are representative of the local community others are less so. Gilbert Slade is in the southern part of the Forest (though on the boundary between south and centre) yet the ethnicity of observed visitors (90% white) is vastly different to that given by the census (36% white). There may be a number of factors to explain this, and the two Wards nearest Gilbert Slade do have a much lower diversity. However this is to some extent countered by the higher than expected diversity in some northern sites such as Honey Lane Quarter, which may show some 'overspill' of visitors from the nearby honeypot site of Pillow Mounds and High Beach, particularly as the well-surfaced General's Ride links the two.

Other sites show that as well as ethnicity, the age of visitors to some sites can vary, with St Thomas Quarter being more popular with those under 20 whereas other sites have an overrepresentation of over 20's and particularly the 20-44 age bracket. This demonstrates the wide variability of use within the Forest with some areas proving to be more amenable to different groups. This may be due to any number of factors and though there is no large-

scale natural segregation of ages, ethnicities and user groups, the minor fluctuations between sites show that there is some degree of preference.

As with previous surveys, dog walking was again shown to be a popular activity, with around 20% of visitors on average visiting with a dog. This is generally higher on sites which border the more populous residential areas.

Table 4: Observation survey results – user profiles

	Gender split Male:Female	% with a dog	Age and ethnicity spread
Connaught Water	52:48	19%	Diverse – closely representing the age and ethnicity of the central area
Gilbert Slade	65:35	35%	Mainly White (90%), contrary to local census data. Good spread of age ranges.
Hangboy Slade and Jacks Hill	62:38	10%	Closely follows ethnicity of local community in the north part of the Forest. Well used by 20-44 age bracket.
Hatch Forest and Whitehall Plain	65:35	30%	Mainly White (93%), More popular with over 20's.
Honey Lane Quarter	55:45	7%	Greater diversity than would be expected given local census data. All age ranges well represented.
St Thomas Quarter	56:44	15%	Greater diversity than would be expected given local census data. Under 20's over represented.
Wake Valley	59:41	5%	Mainly white (92%), similar to the local census. More popular with 20-44 age bracket.
Woodford Green	56:44	10%	Good spread of age ranges with slightly more 5-15 year olds than would be expected from census. Diverse ethnicity (16.3% Asian, 5.5% Black) approaching census.

The information in table 4 is supplemented by the more detailed overview of visitor activity shown in table 5. This shows not just the activities recorded amongst visitors for the 2013 survey, but also the three previous years. These are colour coded to show hot-spots of activity and can help us to tailor our management approaches on these sites accordingly. This demonstrates the fact that some sites and areas are favoured by certain user groups, for example it is perhaps unsurprising that horse riding is more prevalent in the northern parts of the forest where there are a higher number of stables.

One factor noticeable from the 2013 survey is the higher proportion of cyclists on some of the sites in comparison with previous surveys. Could this be a product of the increased profile this activity has had since the 2012 games? Or did these particular sites always attracted high levels of cyclists? Either way it is likely to affect the balance of these sites and how they are managed in the future. Running also appears to be a more prevalent activity in 2013, though not to the same levels as cycling. Active pursuits (cycling, running, football, cricket etc.) account for 21.2% of all visits to the Forest, proving its value as a resource for improving health and fitness.

Table 5: Observation survey - what people were observed to do on a visit?

		Nos. observed	Walking	Walking dog	Cycling	Running	Horse Riding	Standing	Sitting	In pram / buggy	Football	Playing	Fishing	Other
Average weighted by numbers observed	2010 - 13	8584	37.7%	16.9%	9.9%	5.7%	1.4%	5.7%	12.0%	1.3%	2.6%	2.5%	0.4%	3.9%
Connaught Water	2013	615	58.9%	11.2%	5.7%	4.9%	0.5%	4.2%	9.8%	2.4%	0.0%	1.8%	0.0%	0.3%
Hangboy Slade	2013	88	15.9%	6.8%	33.0%	17.0%	3.4%	2.3%	4.5%	0.0%	0.0%	14.8%	0.0%	2.3%
Hatch Forest & Whitehall Plain	2013	138	17.4%	29.0%	39.9%	11.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
Honey Lane Quarter	2013	91	31.9%	5.5%	35.2%	4.4%	6.6%	0.0%	16.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Gilbert Slade	2013	78	24.5%	28.0%	18.0%	5.0%	0.0%	5.3%	8.0%	0.7%	0.0%	6.0%	0.0%	4.7%
Wake Valley	2013	150	33.3%	5.1%	9.0%	0.0%	1.3%	2.6%	35.9%	2.6%	0.0%	0.0%	3.8%	6.4%
Woodford Green	2013	343	46.9%	9.3%	3.2%	2.9%	0.0%	4.4%	14.3%	2.9%	0.9%	0.0%	0.0%	15.2%*
St Thomas Quarter	2013	72	40.3%	8.3%	22.2%	8.3%	15.3%	1.4%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Barn Hoppitt	2012	260	40.8%	21.9%	11.9%	3.8%	1.9%	0.0%	5.0%	1.5%	5.8%	1.2%	0.8%	5.4%
Bush Wood	2012	406	40.9%	17.0%	13.3%	18.2%	0.5%	1.5%	5.4%	1.0%	0.0%	1.2%	0.0%	0.7%
Highams Park	2012	151	36.0%	36.7%	10.0%	5.3%	0.0%	0.0%	4.7%	5.3%	0.0%	0.0%	2.0%	0.0%
Lords Buses / Knighton Woods	2012	157	19.7%	33.1%	5.1%	4.5%	0.0%	14.0%	2.5%	0.0%	0.0%	0.0%	0.0%	21.0% ^T
Pole Hill and Yardley Hill	2012	88	17.0%	55.7%	9.1%	8.0%	3.4%	0.0%	5.7%	1.1%	0.0%	0.0%	0.0%	0.0%
Strawberry Hill	2012	322	42.9%	18.3%	9.9%	8.1%	0.3%	11.5%	7.8%	0.3%	0.6%	0.0%	0.0%	0.3%
Bury Wood	2011	383	32.7%	20.9%	20.1%	7.8%	5.7%	3.9%	7.6%	0.5%	0.0%	0.0%	0.0%	0.8%
Fairmead	2011	547	13.7%	7.9%	12.2%	3.1%	2.2%	19.7%	41.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Hollow Pond	2011	851	35.4%	9.0%	6.5%	3.3%	0.0%	12.9%	17.4%	1.3%	0.5%	3.3%	0.1%	10.2% ^Δ
Loughton Camp	2011	146	43.2%	14.4%	23.3%	7.5%	3.4%	0.0%	4.8%	0.7%	0.0%	0.0%	0.0%	2.7%
Lower Forest	2011	63	50.8%	11.1%	1.6%	3.2%	0.0%	6.3%	9.5%	0.0%	0.0%	0.0%	17.5%	0.0%
Wanstead Flats	2011	1025	28.7%	16.5%	3.3%	6.3%	0.1%	4.7%	13.7%	1.2%	15.9%	6.9%	0.0%	2.5%
Ambresbury Banks	2010	171	35.7%	19.3%	22.2%	11.1%	2.9%	4.1%	0.0%	1.2%	0.0%	0.0%	0.0%	3.5%
Chingford Plain	2010	466	44.2%	25.5%	10.3%	2.8%	4.3%	2.4%	3.0%	0.9%	1.3%	4.7%	0.0%	0.6%
Connaught Water	2010	459	48.6%	18.7%	11.1%	5.0%	4.6%	0.2%	5.7%	1.7%	0.0%	2.4%	0.0%	2.0%
High Beach & Pillow Mounds	2010	611	47.1%	10.8%	8.2%	0.7%	0.5%	4.7%	9.7%	1.0%	4.9%	5.7%	0.0%	6.7%
Wanstead Park	2010	903	40.2%	24.6%	4.3%	7.0%	0.0%	4.2%	12.0%	1.8%	0.0%	0.8%	1.6%	3.6%
Average weighted by numbers observed	2010 - 13	8584	37.7%	16.9%	9.9%	5.7%	1.4%	5.7%	12.0%	1.3%	2.6%	2.5%	0.4%	3.9%

*Cricket players

^IPond dipping group

^ΔMost in rowing boats

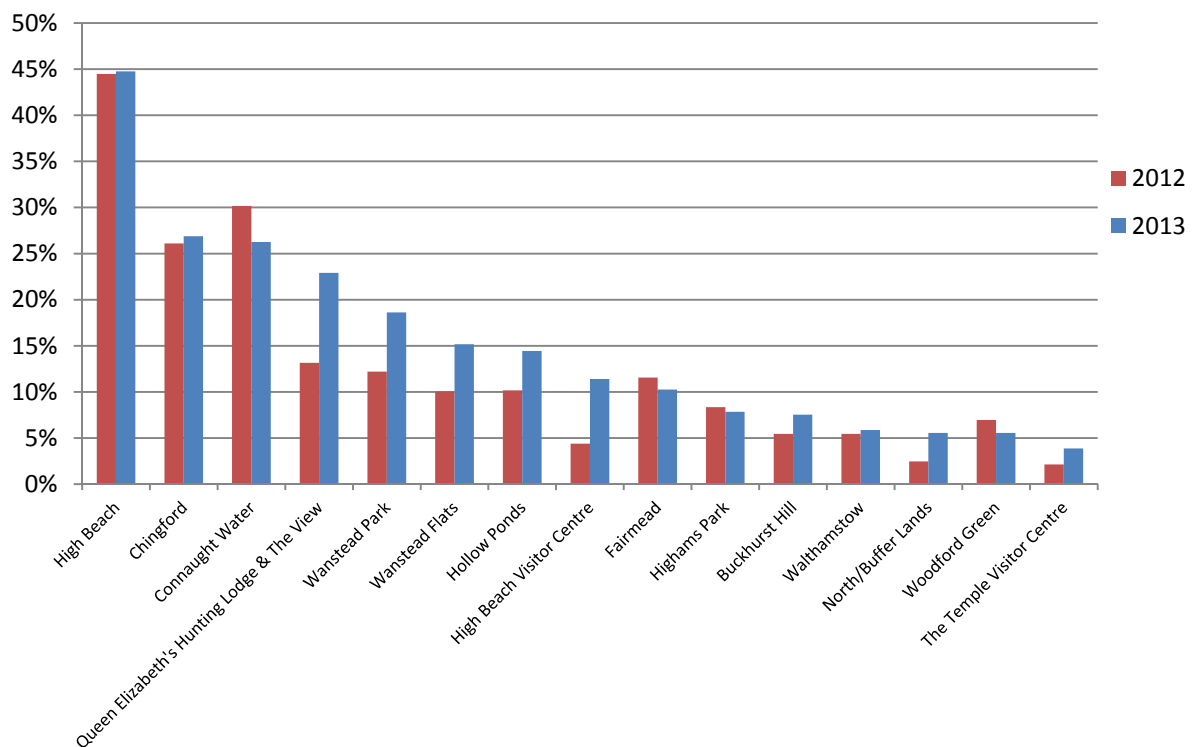
5. Questionnaire Survey

The 2013 questionnaire survey was completed by 1,083 respondents, continuing the year-on-year increase in completed surveys since the beginning of the project. The number of questions was slightly reduced in 2013 after a number of respondents commented on the length of the questionnaire in 2012. We have compiled a wealth of data and gathered the opinions of Forest users from all areas. Added to this we have results from the three previous surveys, allowing us to compare changes in public perception and user preferences over the four year period of the survey.

5.1 Where and how often people visit

Figure 11 shows that, as in previous years of the questionnaire survey, High Beach and the Pillow Mounds area remain hugely popular, as do the central areas of Chingford Plain and Connaught Water. Queen Elizabeth's Hunting Lodge and The View visitor centre has nearly doubled in popularity after improvements at this site in 2012 and both the High Beach and Temple visitor centres have also shown an increase in responses. It is also apparent that some of the busiest areas of the Forest (Wanstead Flats, Hollow Ponds and Wanstead Parks) have shown an increase in popularity, bringing these results more into line with the results shown by the observation survey. These results are to a large extent a result of the location of those who complete the survey. As Figure 12 shows, a large proportion of respondents to this year's survey were based in the centre. There was also an increase in those from the south on 2012's survey, though this is still not close to being representative.

Figure 11 - Where people say they visit. Comparison between 2012 and 2013 surveys*



* (Respondents can select up to 3 sites)

Figure 12 –2013 Questionnaire respondents

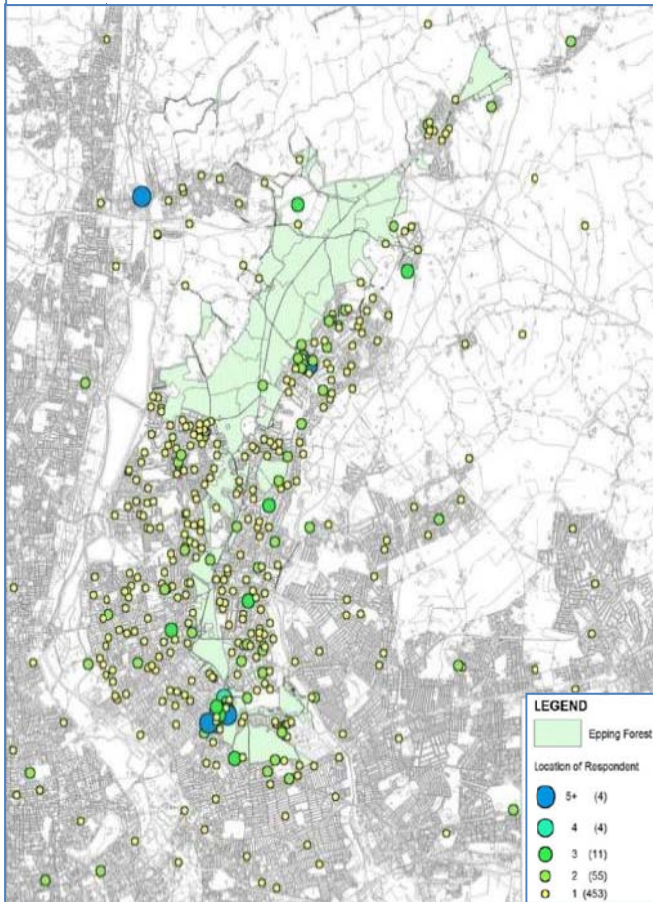
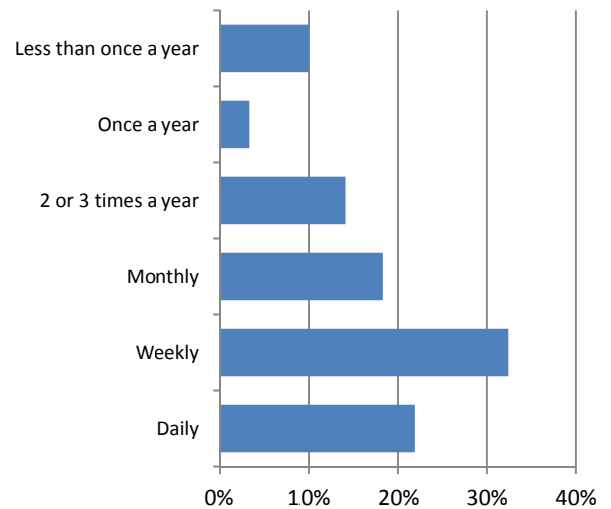


Figure 13 - Frequency of visits to Epping Forest



The southern part of the Forest represents 61% of the population of those living within 2km of the Forest boundary, so in future years we still need to improve the number of surveys completed in the south. When this is the case, the questionnaire survey results for where people visit is likely to match the observational survey results even more closely.

Figure 13 shows the frequency of visits

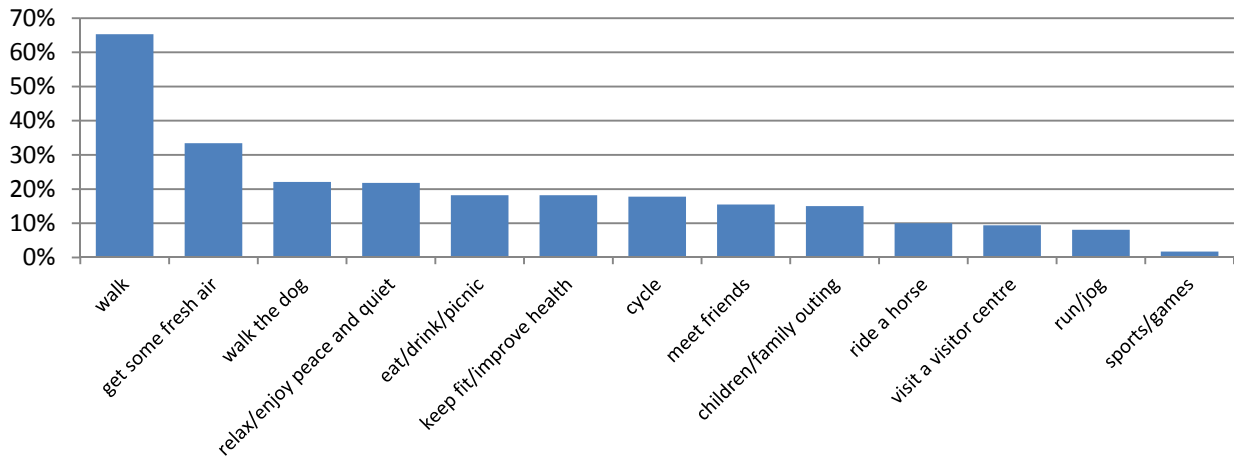
to Epping Forest, with the majority being daily or weekly visits, suggesting amenity and local users. Over a quarter of visitors visit two or three times a year or fewer, indicating that a fair proportion of people on the Forest may in fact be leisure or day trip visitors. This may demonstrate the growing sense of Epping Forest as tourist attraction as this has increased from 10% in the 2010 survey for example.

5.2 What people do when they visit

Most people completing the questionnaire take part in fairly passive activities such as taking a walk, getting some fresh air or enjoying the natural environment. Figure 14 illustrates that a considerable number of visits are also made by those taking part in more active recreational pursuits such as cycling, running, horse riding and dog walking. Cycling and dog walking are both well represented and at a few percentage points higher than recorded during the observation survey.

Horse riding was significantly higher than recorded during the observational survey, suggesting a higher percentage of horse riders complete the questionnaire survey than other user groups. Those partaking in physical activities such as these were much more likely to be frequent visitors, and of those who visit daily, over 50% also said that they walked their dog when visiting.

Figure 14 - What people say they normally do when visiting Epping Forest*

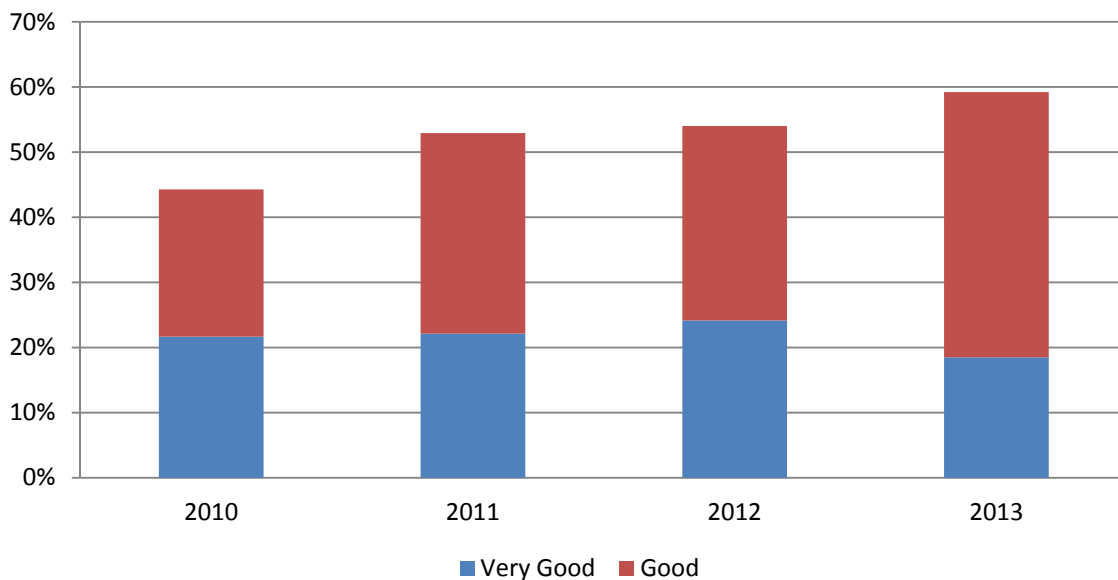


* (Respondents can select up to 5 answers)

5.3 Rating Access

The 1,085 respondents to the survey generally rated access on the Forest positively. Figure 15 shows the increase in visitor ratings of their ability to find their way around the Forest, with a greater number rating this as good to very good year on year. This has occurred over the same period as the installation of seven way-mark trails around the Forest.

Figure 15 - Improvements in ability of visitors to find their way around Epping Forest

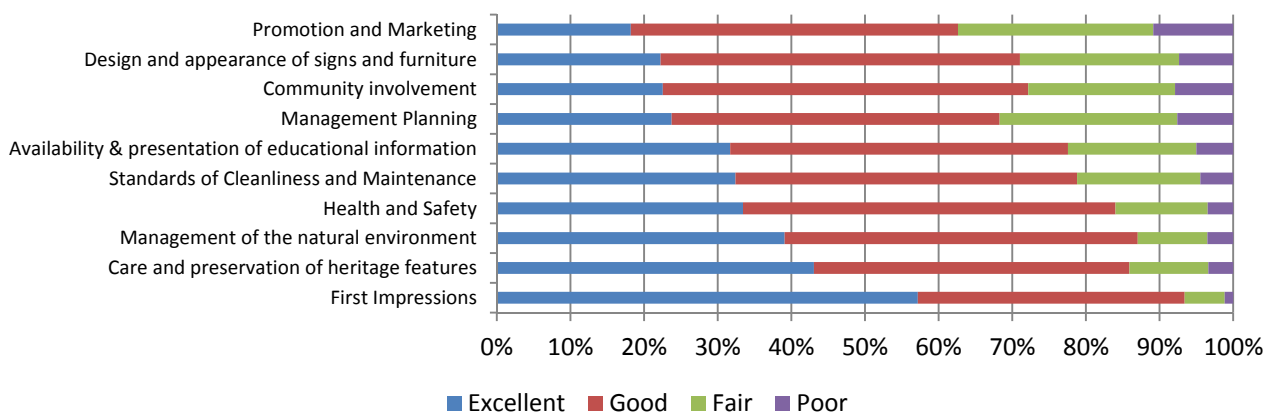


Other access related ratings were generally positive, with a minor reduction in those rating 'use of car parks' and 'taking a rest' as difficult over previous years, but also a slight increase in those rating 'travelling along paths' as fair to difficult. This is perhaps a result of the excessively wet weather over the survey period.

5.4 Rating of organisational activity

Figure 16 shows how people perceive the Forest and the activities of CoL to improve it. Responses are shown to be largely favourable; in particular people's first impression of the Forest is very positive. A considerable number of respondents answered 'don't know' to questions such as rating health and safety and management planning; these were removed from the results shown in figure 16. Nearly all areas showed an increase in ratings of good to very good amongst the public when compared with the last three years surveys. Community involvement has shown noticeable improvement and people's confidence in management planning has increased significantly as levels of public consultation and available information have increased. Promotion and marketing has also shown marked improvement on 2010-12 ratings, but as the only factor with below 20% rating of very good, there is still room for improvement.

Figure 16 - Rating of organisational activities on the Forest



5.5 Nuisance

A large majority of respondents found no nuisance on the Forest (60%). The other issues raised remained largely at similar levels as for 2012 with cyclists (9.6%), dog control (9.2%) and litter (9.8%) all receiving regular mentions. Dog fouling and horse riders remained low at around 2%, and again many of the issues raised were conflicts between the different user groups of cyclists, horse riders and dog walkers. Another issue often mentioned was anti-social behaviour around the use of car parks, the profile of which may have been raised after recent media attention.



Dog walking is a popular activity on the Forest



Illyria open air theatre performances were some of the many popular events held on the Forest in 2013

5.6 Rating of Facilities

Facilities provided by the Forest were again rated well by the public, as they have been for the life of the survey. The visitor centres especially were rated as good to very good by 85% of those who gave a response. Events, information and provision for children and families were rated well and there were minor improvements in the perception of visitor safety on the Forest with fewer people rating this as poor. Food and beverage options were popular with many people listing Butler's Retreat (opened in July 2012) as their favourite location. There were also a number of mentions for the various tea huts around the Forest

with the Fairmead, High Beach and Wanstead Park tea huts being the most frequently mentioned.

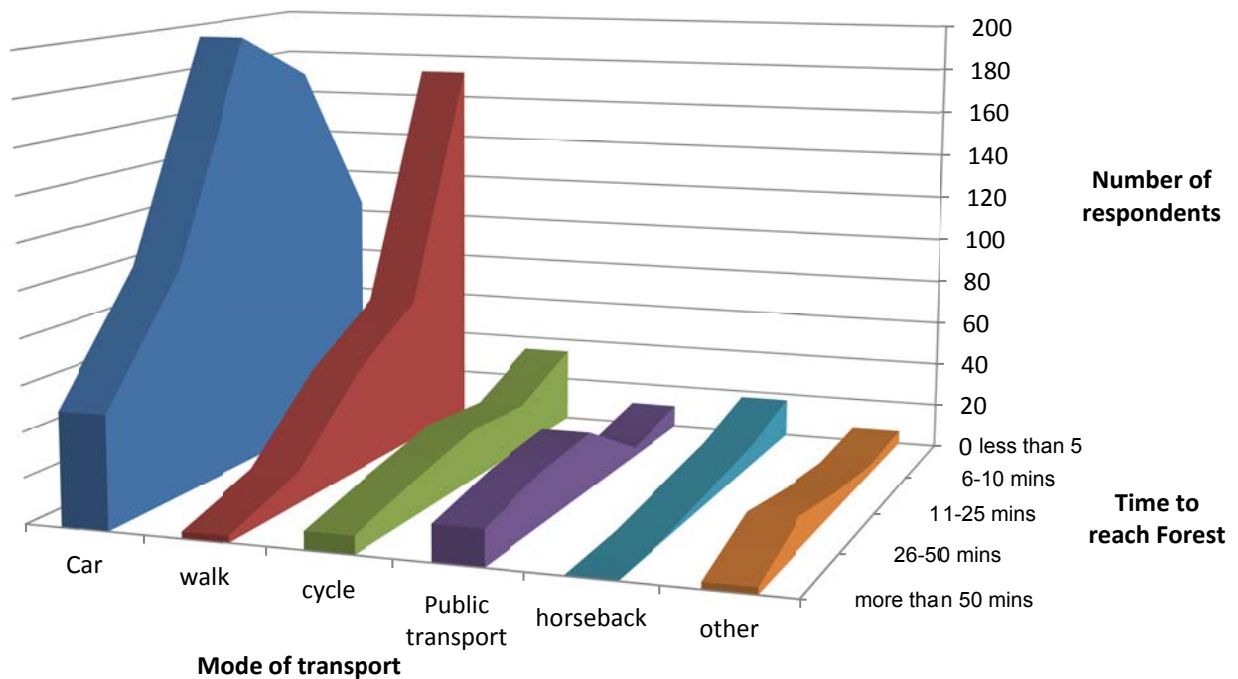
5.7 Transport

When travelling to the Forest the majority of visitors either arrived by car or walked. For journeys of less than five minutes to the Forest, walking was the most popular method of travel, but this tailed off drastically as the journey time increased. Arriving by car was still by far the most common form of transport and remains particularly important for those over 65, used by over 56% of people in this category, and those between 5 and 15 (65%). Use of public transport increases the longer it takes to get to the Forest but has remained at about the same level as previous surveys, as has cycling and horseback riding. Figure 17 shows the profile of the various transport modes for reaching the Forest and the times taken. Car use has also stayed at exactly the same level as 2012 (53% of visitors). In future we hope this will reduce further; we promote the use of more sustainable transport to the Forest through projects such as the shuttle bus between Chingford and High Beach which ran successfully in 2012.



Cycling is still a popular form of transport around the Forest

Figure 17 - Transport mode and time taken to reach the Forest



5.8 Encouraging visitors

When asked what would encourage them to visit the Forest more often, 39% of respondents answered that they were happy with the current provisions. More signage (20%) and more organised events (19%) were the most common requests, both of which the City of London are working hard to improve. We have added way-marked trails around nine locations in the Forest and promote an extensive list of events every year via our Events Diary. More seats and better dog controls were also regularly mentioned as areas for improvement.

5.9 Sources of Information

Most visitors find out information about the Forest and events through word of mouth (51%), the updated CoL Epping Forest website also remained popular (28%) and social media increased on 2012 levels to 8%. The number of people stating they use Forest Focus newsletter as a source of information has dropped slightly but continues to be used by all ages.

5.10 Other comments

The end of the questionnaire survey allows for free comment on the Forest and provides a fascinating and useful insight on both positive and negative user experiences and the wide range of factors that can influence a visitor's enjoyment.

The majority of responses emphasise the pleasure and satisfaction that visitors gain from their time in the Forest:

'First impression of such a wild and vast wildlife habitat which is the Epping Forest - incredible, unique and beautiful enclave within London'

'Very grateful for the work that is done by the Forest Conservators to maintain and retain such an important public space. We are very fortunate to have it on our doorsteps!'

'The access improvements are Connaught Waters are absolutely fabulous - for someone who has difficulty in walking, there's nowhere else like it. Thanks you to everyone who made that happen.'

As with previous surveys, there was a definite split between visitors who emphasised the need for increased facilities such as seating and those who raised concerns about the over-management of the Forest:

'You are turning the Forest into a suburban park! Stop over managing it and providing 'facilities''

'I do not like the way the Forest is being spoilt by car parks and the like which spoil the natural environment. The forest is a forest and not a park. The Forest is being over-manicured and losing its character.'

'More signage please, and directions from stations in appropriate places. It is easy to get lost.'

'Not enough sign posts on paths, can get lost easily. Need more places to sit'

'Have more consideration for less abled visitors'

Both opinions were represented evenly, and this demonstrates the delicate balance the City of London strives for to maintain the natural aspect while enabling the use and enjoyment of all. This includes facilities such as accessible paths, improved visitor car parks and sign posts at areas of high visitor turnover to ensure that these parts of the Forest are accessible to those who may encounter physical, psychological or social barriers to enjoying the Forest. By focusing these improvements in certain areas, it allows other areas with lower visitor numbers to remain relatively wild and unmanaged.

Lack of bins around the Forest was also raised by a high number of respondents and obviously corresponds to the perception of litter as a nuisance on the Forest:

'The lack of provision for rubbish bins of a suitable size at key locations is terrible.'

'There are no provisions for any bins therefore a lot of rubbish is strewn in the forest!'

Lack of bins for dog waste is also mentioned:

'More dog poo bins please.'

'Just could do with some more bins for dog poo'

This is, in part, due to the need to maintain the natural aspect of the Forest. Though we have bins at key points, such as at car parks, it would be unfeasible to increase these without being incongruous to the natural aspect and to maintain regular collections. Additionally, the provision of bins in more secluded spots could actually result in *more* litter being found on the Forest as a result of spread and disturbance of litter from a concentrated area by wildlife, such as foxes and deer, whereas normally this litter would be binned at a more central location or taken home.

Making all bins multi-use, and therefore suitable for dog waste, is one of the many initiatives the City of London has put in place. Judging by the response, not all users are aware of this multi-use. A dedicated litter picking team operates around the Forest, supported by volunteers and local community groups, which organise regular litter picks.

6. Future of the Survey and how it helps

Using the results and data from the observation and questionnaire surveys, CoL is able to improve its management of Epping Forest. The results feed into action plans for the sites observed in 2013, potentially changing the way they are managed. The usefulness of the survey is becoming more apparent as we begin to re-survey sites following improvement works, as we have done this year with Connaught Water. This dramatically improves our ability to evaluate such works and will also help to inform how we undertake large-scale improvements in the future.

The visitor survey continues to provide Epping Forest with invaluable information which can be of use for a number of staff at CoL. Figure 18 demonstrates one such area of use as visitor density maps produced by the survey are overlaid with tree inspection regimes to assess priority inspection areas for our Tree Safety Zone review. The survey also helps to raise awareness about issues the public encounter and to identify patterns of use that may lead to issues in the future, allowing us to address these well in advance.

Action plans have been produced for the sites surveyed in the first three years of the project and the CoL publicises progress against these targets so far:

www.cityoflondon.gov.uk/eppingforestvisitorsurvey

The actions for the 2012 sites have been added to this and a further progress update will be made available at the start of 2014.

2014 Visitor Surveys

The Epping Forest Visitor Survey would not be possible without the hard work of our dedicated volunteers, who contributed over 60 hours of time, mapping 1,395 visitors and covering a huge 120 miles. They also helped to gather questionnaire responses from 1,083 visitors.

Both the questionnaire and observation survey will be running again in 2014.

New volunteers are welcome to assist with the 2014 program of visitor surveys and if you would like to help out with the 2014 survey or find out more about volunteering, visit:

www.cityoflondon.gov.uk/eppingforestvolunteers to enrol or email epping.forest@cityoflondon.gov.uk.

Observation surveys for 2014 will take place at sites including:

- Warren Plantation & Epping Thicks
- Great Monk Wood
- Fernhills and Trueloves
- Chingford Golf Course
- Warren Hill
- Walthamstow Forest

We will also be re-surveying

- High Beach
- Barn Hoppitt
- Fairmead
- Wanstead Flats, splitting this into two survey routes.

Figure 18 – Tree inspection regime at Barn Hoppitt using visitor density data.



Further details of the observation and questionnaire surveys can be obtained from City of London at Epping Forest.

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