

Committee(s):	Date(s):
Epping Forest and Commons	7 July 2014
Subject:	Non-Public/Public
Update on the Epping Forest Visitor Survey	Public
Report of:	For Decision
Superintendent of Epping Forest SEF 15/14	

Summary

This report informs your committee of the results of the fourth year of the Epping Forest Visitor Survey (EFVS) which was conducted during 2013. The EFVS builds upon the survey data gathered since the survey began in 2010, and continues to provide a more accurate picture of the visitor profile for Epping Forest. The EFVS data estimates that the total number of visits (rather than visitors) to Epping Forest in 2013 was 4.4 million.

Statistics from the Questionnaire and Observational surveys have been used in management plans, reports to sponsors, funding bids, information for consultants, influencing partners and press releases. Action plans have been created to raise awareness about issues and, where relevant, make improvements.

The survey is a significant tool in informing management decisions across the Forest, evaluating the impact of initiatives and demonstrating our compliance with our statutory Equality Duty.

Now completely managed within the department, resources incurred are staff time with 417hrs provided by staff and 432hrs provided by volunteers.

Recommendation(s)

- Note the content of the report and agree the site action plans for 2014 (Appendix 1).
- Approve the publication of the 2013 visitor survey and related documents on the City of London website (Appendices 1 and 2).
- Approve the undertaking an annual visitor survey (combined Observation and Questionnaire), which is subject to review after five years.

Main Report

Background

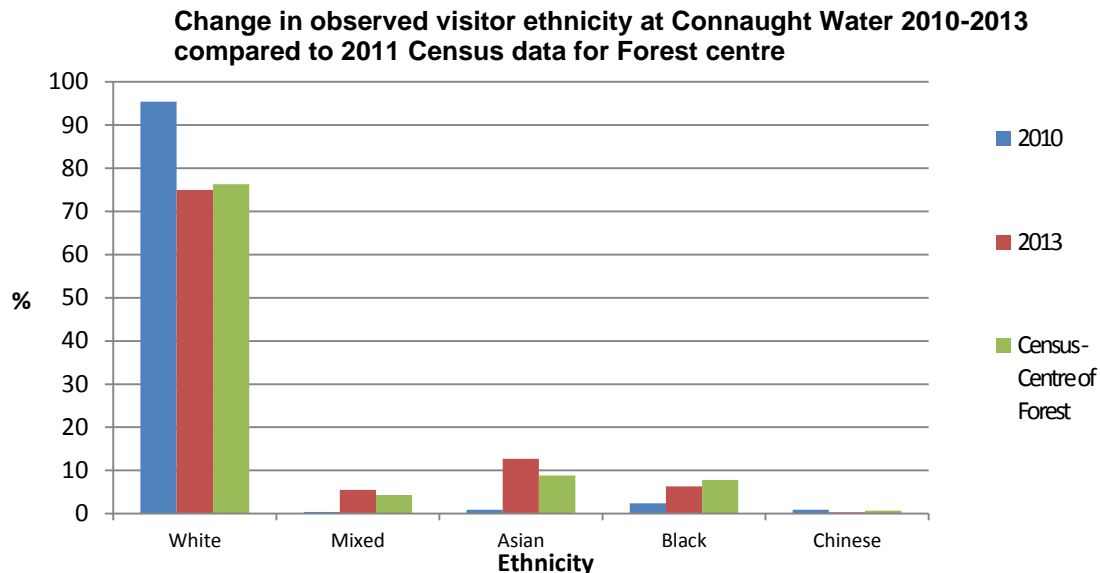
1. The Epping Forest Visitor Survey (EFVS) began in 2010. It was designed and delivered in its first year by specialist consultancy Alison Millward Associates as part of a four year project to train Epping Forest staff and volunteers to deliver the project independently.

2. As part of the phased handover, delivery, analysis and report production of the EFVS was managed internally by the Community Liaison Officer from 2012.
3. The annual EFVS is a dual approach comprising of a Questionnaire Survey and an Observation Survey.
4. The Questionnaire Survey provides the opportunity for visitors to express their opinions of Epping Forest and how it is managed. It was available at our Forest Centres, online and through face to face interviews conducted by the Visitor Services section, Forest Keeper section and volunteers.
5. The Observation Survey records what visitors do when they come to the Forest. To assist this process, the Forest has been divided into 30 geographically distinct sites, the estimated number of visits for each of which we refine through observation. The survey is then repeated on a regular basis across these sites, especially where there has been major capital investment.
6. One hour routes were walked repeatedly at set times across the summer by a team of volunteers and staff for the Observation Survey. In 2013 seven new sites were surveyed across the Forest. Gilbert Slade in the south, Hatch Forest and Whitehall Plain and Woodford Green in the centre and Hangboy Slade, Honey Lane Quarters, St Thomas's Quarter and Wake Valley in the north. Connaught Water first surveyed in 2010 was resurveyed in 2013 following the improvement works in 2012.
7. The total number of visits to 24 of the geographically distinct sites can now be calculated using data from 2010 - 2013. The results help us to estimate figures for the remaining six sites not yet surveyed. Other recorded statistics, such as visitor centre statistics and football pitch bookings, are included to develop a more accurate picture of the actual number of visits to Epping Forest. The estimated total number of visits to Epping Forest in 2013 based on data from 2010-2013 was 4.4 million per annum. A more accurate picture will only be available at the end of 2014 when all of the 30 sites have been surveyed.
8. The number of visits is calculated, not the number of visitors, as one visitor may return many times.
9. The EFVS is designed to gain a greater understanding of how many people visit Epping Forest, their principal activities and how representative they are of the local population. The survey is recognised by Heritage Lottery as an important means of evaluating the impact of the capital projects that are being funded as part of the Branching Out project, including The View and landscaping works.

Current Position

10. For the Observation Survey, staff and volunteers counted and mapped the location of 1,395 visitors across eight sites over 60 hours during the summer of 2013. In addition, 1,083 questionnaire surveys were completed.

11. The total volunteer time for the whole project was in excess of 400 hours in 2013. This included collecting and inputting the data from both the Observation Survey (384hrs) and the Questionnaire Survey (48hrs).
12. The results surveying over four years show that the areas with the highest footfall are in the south of the Forest and at honeypot sites (Wanstead Flats, Wanstead Park, Leyton Flats, Connaught Water, Chingford Plain, High Beach and the Pillow Mounds). Most sites in the north of the Forest have low visit numbers, a result of their remote nature and sparser local population.
13. The results can also be compared to the 2011 census data to ensure we are accessible to all of our local community. Age of visitors and ethnicity varies by site, demonstrating that the Forest has a wide range of users with some areas proving more amenable to different groups.
14. Of the sites surveyed in 2013, Hangboy Slade, Honey Lane Quarters, St Thomas's Quarter and Wake Valley all received approximately 50,000 or less visits. These sites are of high conservation value and it is important that they remain relatively undisturbed. Whitehall Plain and Gilbert Slade received approximately 75,000 visits each and Woodford Green received 283,270 visits. They are well used by the local community as amenity sites (commuter route / daily to exercise / walk the dog).
15. Connaught Water was surveyed in 2010 and resurveyed last year after the Branching Out improvement works, which took place in 2012. Results show it now has a much more diverse visitor profile, better reflecting the local community.



16. Visitor density maps produced by the survey are overlaid with tree inspection regimes to assess priority inspection areas for our Tree Safety Zone review.
17. The Questionnaire Survey gave us more information on people's opinion of the Forest, their favourite areas, how often they visit and how they travel to the Forest along with a range of other data covering the visitor experience.

18. All of the visitor ‘hubs’ with more than 200,000 visits (Appendix 2 identifies eight) remain popular with Queen Elizabeth’s Hunting Lodge and The View doubling in popularity after improvements in 2012.
19. The respondents generally rated access to the Forest positively with an improvement in the rating for way finding. This has been increasing year on year and appears to coincide with the installation of the way marked trails.
20. The surveys revealed that active pursuits (cycling, running, cricket, football, etc.) account for 21% of all visits to the Forest, proving its value as a resource for improving health and fitness.
21. Further comments included:
 - “More signage please, and directions from stations in appropriate places. It is easy to get lost”*
 - “The access improvements to Connaught Waters are absolutely fabulous – for someone who has difficulty in walking, there’s nowhere else like it”*
 - “The lack of provision for any bins of a suitable size at key locations is terrible.”*
 - “Very grateful for the work that is done by the Conservators to maintain and retain such an important public place. We are very fortunate to have it on our doorsteps!”*
22. The results of Visitor Survey will be posted on the City of London’s website www.cityoflondon.gov.uk/epping_forestvisitorsurvey, pending Committee approval, and reports from previous surveys can be viewed here. They are accompanied by reports on progress with action plans derived from the survey.
23. Statistics from the Questionnaire and Observational surveys have been used in management plans, reports to sponsors, funding bids, information for consultants, influencing partners and press releases. Action plans have been created to raise awareness about issues and, where relevant, make improvements

Evaluation

24. Through the visitor survey project we will continue to develop our understanding of visitors to the Forest. This data allows us to assess the impact of new initiatives and capital investments on our sites as well as informing the future management of the Forest.
25. A breakdown of resources is set out below

Staff Commitment		Volunteer Commitment	
Hours	Details	Hours	Details
98	GIS Officer map preparation and data analysis	384	Observation Survey collection and data input of 8 sites
41	Forest Keepers Questionnaire survey collection	10	Visitor Survey Volunteers Questionnaire Survey collection

68	Visitor Services Questionnaire survey collection and input	38	Questionnaire Survey Data input
210	Community Liaison Officer Project management	n/a	
417	TOTAL	432	TOTAL

26. An Evaluation Report has been prepared for the Visitor Survey project, which demonstrates its significance in providing evidence for informed decision making almost every area of aspect of our work, from conservation to the visitor experience.

Proposals

27. The Questionnaire Survey will be run between May and September 2014 with data being collected online and by forward facing staff and volunteers including Visitor Services and Forest Keeper sections.
28. The Questionnaire Survey will then continually annually and be reviewed in five years' time.
29. The Observation Survey for 2014 will be conducted by staff and volunteers from April to September. It will include the six as yet unsurveyed sites and resurveying at Wanstead Flats, High Beach, Barn Hoppitt and Fairmead.
30. The Observation Survey will continue until every site has been surveyed at least twice. Additional to this sites where capital works or improvement works have been carried out, these sites will also be surveyed following the completion of the projects, including Wanstead Flats, Highams Park and Wanstead Park. The Observation survey project will be reviewed in five years' time.
31. Site action plans will be implemented for the areas surveyed in 2013 (Appendix 1).
32. Posters will be put up reporting on progress to date with actions identified from previous visitor surveys (Appendix 3)
33. The Community Liaison Officer will hand over coordination, analysis and reporting for the visitor survey to the Visitor Services or Business Team, with training and work shadowing from May 2014.

Corporate & Strategic Implications

34. By gathering and collating statistics on visitors, effectively our service users, and involving volunteers in the process, the Visitor Survey helps to meet three of The City Together Strategy's aim to be competitive and promote opportunity. Along with the aim of supporting our communities and promoting and enhancing our environment.
35. Volunteering and community involvement are included in the Open Spaces Business Plan 2012 – 2015 Strategic Aim, "A World Class City needs a World Class Environment". The Visitor Survey fulfils all of the Open Spaces

Departmental Objectives of quality, inclusion, environment, promotion and people.

36. Inauguration costs for the visitor survey totalled £39,972 for consultancy fees. Payment was divided equally between Local Risk and the Branching Out project, which receives Heritage Lottery funding.
37. The visitor survey directly relates to Management Plan strands such as volunteering, training and public involvement whilst also informing areas such as outreach, equality and accessibility. The survey helps demonstrate our compliance with our duty under the Equality act 2010.

Conclusion

38. Having completed its fourth year, the EFVS continues to give us further insight into the many different areas of Epping Forest. As more data is accumulated, trends are becoming more apparent and over time we may be able to infer the effects of various projects throughout the Forest.
39. The total number of annual visits to Epping Forest is now estimated at 4.4 million. As with previous years the Questionnaire Survey shows that the honeypot areas remain hugely popular and receive 46% of Forest visits.
40. The findings from the 2013 visitor survey have allowed Epping Forest to produce site action plans for the eight sites surveyed and highlighted potential issues and opportunities to improve these sites for visitors and the natural environment.
41. Sharing the results with the public via the web pages strengthens the relationship between the City and the local community. It demonstrates our journey towards change showing we are thinking of our customers, we have a plan and are working towards it.
42. The first four years of the EFVS project was mainly collecting baseline data, revisiting these sites and surveying them in the future allows us to evaluate the impact of projects and ensure we are providing a good service to our customers.

Appendices

- Appendix 1 – Visitor Survey 2013, Site Action Plans
- Appendix 2 – Visitor Survey 2013, Full report
- Appendix 3 – Visitor Survey 2013, Report Posters

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Appendix 1 – Visitor Survey 2013, Site Action Plans

Site	Details	Lead Officer	Completed
Hatch Forest & Whitehall Plain	Assessment and repair, if required, of bridge over River Ching	HoO	April 2015
	Liaise with LBWF regarding improvements to the crossing of Whitehall Road to improve safety.	HoO	April 2015
Woodford Green	Installation of interpretation panel Delivery of two events, to be held at a weekend	VSM VSM / HFK	April 2015 October 2014
	Paths to be opened up around the Green	HoO	October 2014
Hangboy Slade	No Action Required		
St Thomas's Quarter	No Action Required		
Wake Valley	No Action Required		
Hangboy Slade	No Action Required		
Connaught Water	No Action Required		
Gilbert Slade	No Action Required		