

Committee(s)	Dated:
Epping Forest and Commons	06/07/2015
Subject: Update on the Epping Forest Visitor Survey	Public
Report of: Superintendent of Epping Forest (SEF 31/15)	For Decision

Summary

This report informs your committee of the results of the fifth year of the Epping Forest Visitor Survey (EFVS) which was conducted during 2014. 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 2014 was 4.2 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.

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.

The survey is now completely managed within the department, resources incurred are staff time with 450hrs provided by staff and 490hrs provided by volunteers.

Recommendation(s)

Members are asked to:

- Note the content of the report for 2014.
- Approve the publication of the 2014 visitor survey (Appendix 1).

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 can then be 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 2014, six new sites were surveyed across the Forest. Walthamstow Forest in the south, Fernhills & Trueloves, Warren Hill and Chingford Golf Course in the centre and Great Monk Wood and Epping Thicks & Warren Plantation in the north. Four sites were resurveyed creating two sets of comparable data for Barn Hoppitt, Fairmead Bottom & Almshouse Plain, Wanstead Flats and Bush Wood.
7. The total number of visits to 30 geographically distinct sites can now be calculated using data from 2010 - 2014. Other recorded statistics, such as visitor centre statistics and golf 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 2014 based on data from 2010-2014 is 4.2 million per annum. This estimate is down 0.2 million per annum from 2013 but reflects a more accurate picture than any previous estimates that were based on higher assumptions prior to the whole Forest being 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 2,560 visitors across ten sites over 80 hours during the summer of 2014. In addition, 885 questionnaire surveys were completed.

11. The total volunteer time for the whole project was 490hrs hours in 2014. This included collecting and inputting the data from both the Observation Survey 436hrs and the Questionnaire Survey 54hrs.
12. The results surveying over five 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 and High Beach). Most sites in the north of the Forest have low visit numbers, a result of their remoter 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. The 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 2014, Warren Plantation & Epping Thicks and Fernhills & Trueloves received approximately 50,000 or less visits. The current low use of these sites is sympathetic to their conservation value.
15. Warren Hill and Great Monk Wood received approximately 60,000 visits each. These sites are still low visit numbers but any opportunities to improve areas for visitors should be directed to more popular sites so more people would benefit from any investment.
16. Both sites surveyed at Wanstead Flats (Bush Wood and Aldersbrook) received over 250,000 visits. This reflects the high population density surrounds and good transport links.
17. The Aldersbrook area was surveyed in 2011 and resurveyed last year following the Jubilee Pond Branching Out improvement works (completed in 2013). Although not directly comparable due to data collection methods, results show that more visitors are enjoying playing or sitting, an indicator of success of the natural play and increased seating at the site.
- 18.
19. 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.
20. The visitor 'hubs' remain popular although the visitors to High Beach Forest Centre have dropped by 8% from last year, this was probably as a result the reduction in opening hours.
21. When asked to rate the Organisational activities undertaken by the Conservators there was an overwhelming response of 'don't know' in respect of management planning. This suggests that our visitors need more involvement, something which the planned summer management plan issues consultation should, in part, address.
22. The survey revealed that activities such as walking, enjoying the environment and picnicking are most popular. Exercise and fitness pursuits are also popular

but less represented in the questionnaire; this is in part due to the need to cease activity to complete the survey.

23. Further comments included;

- 'I think the Forest is well kept and maintained'
- 'I really enjoy walking in Epping Forest and it is well managed. However, the paths could be better signed – I often get lost!'
- 'You are doing fine without my input'
- 'It's a Forest. It should be left as natural as possible. Health and safety have no place here. You can't wrap trees in bubble wrap'
- 'Very friendly survey staff'

24. The results of Visitor Survey will be posted on the City of London's website www.cityoflondon.gov.uk/eppingforestvisitorsurvey, on Committee approval, where reports from previous surveys can also be viewed.

25. 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.

26. One example of how the visitor survey data is used by Epping Forest teams is to produce visitor density maps that are overlaid with tree inspection regimes to assess priority inspection areas for our Tree Safety Zone review.

27. 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.

28. The Visitor Survey was delivered by the Community Liaison Officer (CLO), funded in part from local risk and in part by the Heritage Lottery Fund (HLF) grant. The HLF funding for the Visitor Survey project, and for the CLO post ceased in December 2014. Responsibility for the survey will be maintained by the Visitor Service and Forest Keeper Teams.

29. The key findings from our visitor survey report 2014 echo the findings in the Monitor of Engagement with the Natural Environment survey, published August 2014, funded by Natural England, with the support from Defra and the Forestry Commission. Over 46,000 people were surveyed to identify how people use and enjoy the outdoors in England.

Options

30. **Option 1** - The Conservators continue with the existing Visitor Survey annually to ensure continued understanding of our visitors and the impact of the work we do.

31. This option is resource intensive, despite valuable support from volunteers. The CLO post ceased in December 2014 thus 250 hours of staff time would have to be found from existing roles. Giving consideration to the existing and planned projects for 2015 this will prove challenging.

32. The Conservators plan to undertake the largest public consultation they have ever embarked upon during summer 2015 to inform the Epping Forest Management Plan 2017-2027. This consultation exercise will help us understand our visitors providing useful data such as demographic and the area visited and any issues they feel are most important to improving their visitor experience.
33. Undertaking the Questionnaire Survey at the same time may cause consultation fatigue for staff, volunteers and visitors thus reducing the efficacy of both surveys. **This option is not recommended.**
34. **Option 2** - The Visitor Survey be postponed temporarily until resources or need compel reactivation.
35. The past five years of visitor surveying has produced an excellent set of Whole Forest Data (WFD) which can be used to inform our work. Survey data can be used confidently without the need to resurvey annually. Five yearly is sufficient. The census data, with which we compare our results, was compiled in 2011 and will be used until 2021.
36. The format and process used to gather the data can be reactivated in the future years to undertake another full Visitor Survey when resources allow or subsequent to any major development work to evaluate success. **This option is recommended.**

Proposals

37. The Visitor Survey is postponed in 2015 while the Epping Forest Management consultation is undertaken.

Corporate & Strategic Implications

38. By gathering and collating statistics on our service users, and involving volunteers in the process, the Visitor Survey helps to meet The City Together Strategy's aims to be competitive and promote opportunity, to support our communities and to promote and enhance our environment.
39. 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.
40. Visitor surveying 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.

Implications

41. **Financial implications** - Inauguration costs for the visitor survey totalled £39,972 for consultancy fees divided equally between Local Risk and the Branching Out (lottery funded) project.
42. In the absence of the grant funded post, the challenge will be to build up staff capacity to support future survey work.
43. Property implications – Survey data may prove useful in understanding public access to property related services, to help shape and inform the property requirements.

Conclusion

44. Having completed its fifth year, the EFVS continued to give us further insight into the many different areas of Epping Forest. As more data has been accumulated, trends are becoming more apparent and hypotheses can be drawn on the effects of various projects throughout the Forest.
45. The total number of annual visits to Epping Forest is now estimated at 4.2 million. As with previous years the Questionnaire Survey shows that the honeypot areas remain hugely popular and receive 52% of Forest visits.
46. The findings from the 2014 visitor survey highlighted potential issues and opportunities to improve these sites for visitors and the natural environment.
47. 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.
48. The first five years of the EFVS project collecting Whole Forest Data allows us to revisit these sites and survey them in the future helping us to evaluate the impact of projects and ensure we continue to provide a good and relevant service to our customers.

Appendices

- Appendix 1 – Visitor Survey 2014, Full report

Background Papers

Update on the Epping Forest Visitor Survey – May 2014 - SEF 15/14
Update on the Epping Forest Visitor Survey – May 2013 - SEF 9/13
Update on the Epping Forest Visitor Survey – July 2012 - SEF 19/12

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