

<b>Committee(s):</b> Epping Forest and Commons – For Information Epping Forest Consultative Group – For Information	<b>Dated:</b> 15/06/2023 21/06/2023
<b>Subject:</b> Visitor Survey (SEF 11/23)	<b>Public</b>
<b>Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly?</b>	3,4,11,12
<b>Does this proposal require extra revenue and/or capital spending?</b>	<b>N</b>
<b>If so, how much?</b>	<b>£</b>
<b>What is the source of Funding?</b>	
<b>Has this Funding Source been agreed with the Chamberlain's Department?</b>	<b>N/A</b>
<b>Report of:</b> Juliemma McLoughlin, Executive Director, Environment	<b>For Information</b>
<b>Report author:</b> Jacqueline Eggleston, Natural Environment, Epping Forest	

### Summary

This report presents a visitor survey for Epping Forest that has been recently commissioned and which uses new technology and a methodology that has not been used in previous visitor surveys. The analysis of this new survey provides some interesting information about visitors to Epping Forest including total numbers. Notably, as the survey has been able to be backdated to 2019 it shows that annual visits to the Forest are normally around 10 million. This is double the amount that previous surveys have estimated.

### Recommendation(s)

Members are asked to:

- Note the report.

### Main Report

#### Background

1. The first comprehensive survey of visitors to Epping Forest was undertaken between 2009 and 2014. This compiled a series of onsite face to face surveys with other desktop information.
2. This five-year study provided useful information about our visitors including whereabouts they visited, how they travelled there and what they did when they got there. At the end of the five annual surveys, the figures were aggregated and it was concluded that the average annual visits to Epping Forest was 4.2 million.
3. In preparation for the strategic access monitoring and mitigation agreement (SAMMS) with surrounding local authorities a further two 'snapshot' visitor surveys were undertaken in 2017 and 2019. The questions and locations in these surveys were similar to those used in the five-year visitor survey and produced similar results.

## **Current Position**

4. A new form of visitor survey has been developed using mobile phone data. Information collected on the mobile phone apps is accessed to provide location information of the user. All data is completely anonymized, and no individual users can be identified.
5. However, the location information collected can show where a mobile phone user has been, for how long, and where they have come from (based on the address the phone is registered to).
6. A survey using this new form of data collection has been commissioned for Epping Forest. All areas of Epping Forest and the majority of the buffer lands has been surveyed in this way. The attached report in Appendix 1 from HUQ, analyses the information collected from this survey.
7. Because HUQ have access to historical data it has been possible to show visiting trends since 2019

## **Key Data**

8. The HUQ report finds that the average daily footfall for Epping Forest was 24,500 over the last 12 months up to March 2023. This brings the total annual footfall to just shy of nine million over the last 12 months.
9. Annual footfall figures dropped considerably in 2020 and 2021 to 5.3 million and 4.9 million respectively. By 2022 annual figures are just shy of 8 million with figures in 2023 so far showing a likely return to pre-pandemic visitor numbers of over 10 million visits per annum
10. These annual figures are double the annual visitor numbers previously estimated for Epping Forest.
11. The day of the week that visitors come to Epping Forest has changed. Pre-pandemic visitor numbers were higher at weekends than weekdays, particularly on a Sunday. However, over the last 12 months the weekend daily average has fallen below that of the weekday daily average.
12. The time of day for visiting has also changed. In 2019 the peak times for weekday footfall were between 7:00 AM and 8:00 AM but over the last 12 months the peak hour was 3:00 PM.
13. By combining these insights into visitor patterns, it appears that the lower visitor numbers during the two pandemic years reflects the reduction in use of the Forest at commuting times with numbers particularly dropping at the 7am to 8am period and in the 5pm to 6pm period. This may either reflect less use of the Forest for cycling or walking routes to work, and/or dog walking or exercise either side of the working day.
14. In the last 12 months the weekday visitor pattern more closely mirrors pre-pandemic visiting but with generally higher numbers from 10am to 5pm than in the past.
15. Times of visiting at weekends, however, have remained consistent every year.
16. The significant peaks in visiting observed on site in the Forest during the pandemic, are reflected in the detail of the survey with notable spikes but overall usage across the Forest was less in 2020 and 2021.

17. The average duration of visits over the last 12 months was 5% above the 2019 pre-pandemic mean. On average weekdays attracted a visit of 164 minutes and weekends 154 minutes. This is a longer duration than previous surveys concluded which had been an average of 1-2 hours.
18. The survey provides post code data of where visitors originate from. The top four post codes are within Waltham Forest and Newham (E17, E11, E7 and E4) with remaining top ten post codes mainly in Redbridge and Epping Forest district.
19. Visitors frequent the Forest an average of 7.5 times per month.
20. The density mapping presented needs some further refinement but will be in future a useful tool to better analyse where visitors frequent the most in the Forest.

## **Corporate & Strategic Implications**

### **Financial implications**

21. The HUQ visitor survey represents a low-cost option for surveying that is met from local risk.

### **Resource implications**

22. This method of surveying reduces staff resource that would otherwise be spent surveying in person.

### **Legal implications**

23. HUQ provide detailed information on how the survey method of capturing data meets all data protection legislation.

### **Risk implications**

24. The survey provides information about visiting patterns which will help to plan for risk mitigation.

### **Equalities implications**

25. The survey offers post code data for visitors to Epping Forest which could potentially be used in conjunction with census data to offer insights into income bracket and typical household makeup. However, this would be a very broad comparison and would be too likely to be inaccurate to offer any meaningful insight. Further visitor surveys will continue to be undertaken as part of the SAMMS agreement, every five years, which will offer more detailed analysis of the characteristics of visitors that can be used to indicate whether Epping Forest visitors are representative of local communities.

### **Climate implications**

26. The visitor survey highlights the number and frequency of visitors to the Forest. This information will be collected on a longitudinal basis to assess the impact of local population growth and development.

### **Charity implications**

27. Charity implications – Epping Forest is a registered charity (number 232990). Charity Law obliges Members to ensure that the decisions they take in relation to the Charity must be taken in the best interests of the Charity.

## **Security implications**

28. None.

## **Conclusion**

29. The HUQ visitor survey provides a more accurate way of collecting visitor data; particularly footfall and visit frequency, then has been achieved through traditional surveying in the past. As Epping Forest has a completely permeable boundary other methods of collecting footfall at static data points risks missing considerable numbers of visitors.
30. Previous visitor surveys have tended to be mainly conducted in car parks which may skew results in favour of the number of visitors arriving by car and also neglect the number of visitors arriving in the Forest on foot particularly on the western side of the forest where there are very few car parks.
31. This survey does not provide all of the visitor information we require for the better management of the Forest such as visitor profile how visitors arrive in the forest and what they do what activities they undertake when they get there. Therefore, additional visitor surveys will still be required.

## **Appendices**

Appendix 1 – Huq Visitor Survey report April 2023

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