Enhancing the woodland user experience

A toolbox for assessing community woodlands

Introduction and toolsheets

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Introduction

This **'Enhancing the woodland experience' toolbox** provides a comprehensive, flexible and inclusive approach to the assessment of woodland user experiences. The toolbox characterises the experience from different perspectives and offers in-depth understanding of a site's qualities, problems and potential.

If the aim is to increase user numbers, encourage a diversity of users and broaden woodland appeal, this toolbox can identify clear, evidence based action points. Site managers get to see the site with fresh eyes and are able to focus resources and to promote use in ways that best suit existing and new users.

The toolbox allows all relevant views to be taken into account and engages both the public and staff. Through positive engagement with the community, the toolbox bridges the gap between formal public consultation and the development of action plans. It gives those who manage woodlands a better insight into the woodland experience and offers a practical decision-making tool for design and planning investment.

Toolbox application

The toolbox can be used by site managers, rangers and woodland wardens. It is designed to improve the user experience for people who currently access their local woodland and to encourage use by people who currently do not, with a focus on promoting the benefits of walking. Typically, woodland sites will have some infrastructure in place, or at least informal paths or routes through the site. The site should be robust enough to cope with many users.

The toolbox provides a framework for the identification and analysis of opportunities to improve access, circulation and overall enjoyment of the woodland. It can also help reveal the hidden potential of a woodland for new experiences to be created. All the information gained can also contribute towards the development of visitor experience plans, forest design plans and promotional information.

Walking in the woods is the most popular use for open space and this is the focus of the toolbox. Nonetheless, woodland managers often have other objectives to consider as well, e.g. Core Path Plans, The Equality Act (2010), tree management, interpretation and activities other than walking. With this in mind, the visitor questionnaire from Tool 1 captures multi-user information and identifies which issues relate to which user-group, e.g. whether wayfinding problems relate to cyclists as well as walkers.

Toolbox overview

The toolbox brings the user experience into focus by assessing a site from a range of perspectives (see Figure 1). The sequence and purpose of the different tools are:

Tool 1: Ask the visitors – What existing users would like to see improved

Why existing users visit and when, where they go, what they do and how they find their way.

Tool 2: Accompanied walks – What new users would like to see improved

User experiences from different community groups who may or may not be regular users at present.

Tool 3: Role-play – Problems with wayfinding and information provision

Role-play scenarios for site managers to identify information inconsistencies and potential points of confusion.

Tool 4: Pulling it together – A plan for action on a map

Review the site experience with information gathered from previous tools to identify *what* should happen and *where*.

Tool 5: Actions and priorities – An evidence based action plan

Collated information in tabular form that identifies *what* should happen and *why*.

Using the toolbox

The toolbox is designed to be flexible. It is recommended that all five tools are used as a single assessment process. However, the tools can also be used on their own to review a particular aspect of the user experience, or used and re-used for ongoing evaluation. Applying the toolbox at different times, days and seasons will help gather the most reliable data but if timescales demand, tools can be adapted to much shorter periods.

Toolsheet   Supporting document

There are references throughout the toolsheets to supporting documents. They are colour coded and indicated as below:

Visitor questionnaire B

Figure 1 Toolbox overview.

Task	Method	Output
Tool 1: Ask the visitors – What existing users would like to see improved		
• Who are the users? • Why are they here? • What do they do? • What routes do they use? • What are their likes/dislikes? • How easy is it to find and use the site?	• Conduct visitor survey • Plot paths and entry points on map • Collate visitor questionnaire data	• Completed visitor questionnaires • Map of entrances and routes used by visitors • Visitor questionnaires collated to give qualitative user experience data
Tool 2: Accompanied walks – What new users would like to see improved		
• What is the walking experience like for different user groups, at different times of the year? • What are the main characteristics of the walking experience? • How is the experience best described?	• Recruit participants • Conduct accompanied walks and record user experience	• Accompanied walk records
Tool 3: Role-play – Problems with wayfinding and information provision		
• Are names and directions on signs and pre-arrival information consistent? • Is your site welcoming? • Do entrances encourage or deter? • Are there any points of confusion? • Is the right information in the right place?	• Identify wayfinding scenarios • Role-play and record user experience • Entrance assessment using gateway effect checklist	• A record of visitor wayfinding experience • An inventory of entrances
Tool 4: Pulling it together – A plan for action on a map		
• What are the key problems and what has potential? • What could improve the user experience? • What is most needed and where?	• Sketch mapping, survey and analysis	• User experience summary map
Tool 5: Actions and priorities – An evidence based action plan		
• What evidence supports your actions? • What actions and resources should be prioritised? • What should be preserved, re-assessed or changed? • What is most needed and why?	• Collate user experiences • Identify actions and priorities	• Summarised user experiences • Actions and priorities plan

Tool 1: Ask the visitors
What existing users would like to see improved

Method	Output
• Conduct visitor survey Visitor questionnaire survey guidance **A** Visitor questionnaire **B**	Completed visitor questionnaires
• Plot paths and entry points on map Visitor route map example **C**	Map of entrances and routes used by visitors
• Collate visitor questionnaire data Questionnaire collation sheets **D**	Visitor questionnaires collated to give qualitative user experience data

Conduct visitor survey

- Follow Visitor questionnaire survey guidance **A** (note: users should be questioned as they leave the site).
- Aim for at least 30 participants to give a good range of opinions. Smaller sites with fewer users may need more time to gain sufficient numbers.
- Take a labelled and laminated site map with you when questioning visitors:
  – Number all entrances.
  – Label landmarks, paths and any other features.
- The Visitor questionnaire **B** has 23 questions and is divided into two parts:
  – Part one:
    • Questions 1–9 give an overview of visitor profile with frequency of use and time spent on site.
    • Questions 10–14 give purpose of visit and likes/dislikes.
  – Part two:
    • Questions 15–22 cover wayfinding and information: including prompts to gather detail of the user's wayfinding experience.
    • Question 23 is for any other comments.

Plot paths and entry points on map

The toolbox assumes the site has some infrastructure or at least informal paths or routes. In this instance, treat informal routes as the 'paths' and points of entry as the 'entrances'.

- Plot all user entrances and routes on a site map (see Visitor route map example 🅒).
- Refer to user information from questions 17, 19 and 22.
- Mark your map with crosses and movement lines, using colours to distinguish between:
  – Entrances and routes for first time/new users.
  – Entrances and routes for existing/regular/other users.
  – Existing users recommended entrances/paths for new visitors.
- It is also useful to plot routes taken by different user groups, to distinguish between walkers and cyclists, for example.
- Plotted information can be done by hand on one map or in digital format with layers e.g. a CAD drawing.

Collate questionnaire data

- Use the template Questionnaire collation sheets 🅓
- The questionnaire collation sheets are split into two parts:
  – Part one results are required for **Tool 3: Role-play** and **Tool 5: Actions and priorities**.
  – Part two identifies scenarios for wayfinding analysis in **Tool 3: Role-play**.

ASK THE VISITORS ACCOMPANIED WALKS ROLE-PLAY ACTIONS & PRIORITIES
WOODLAND USER WAYFINDING VISITOR QUESTIONNAIRE USER EXPERIENCE
INFORMATION PROVISION GATEWAY EFFECT
ENTRANCE INVENTORIES PHOTO DOCUMENTARIES SUMMARY MAP INTERPRETATION
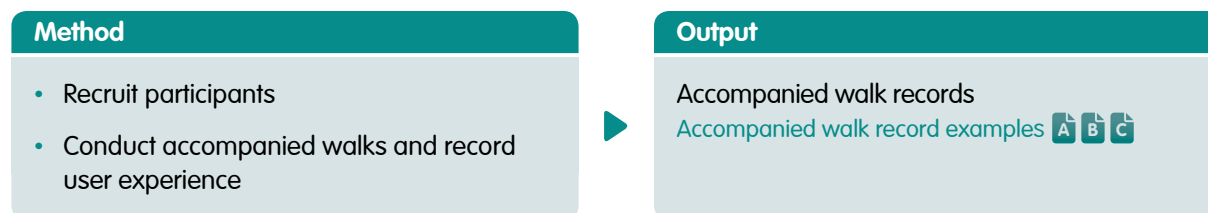ROUTE MAP COMMUNITY VISITOR EXPERIENCE PLOTTING FOOTPATHS ANALYSE
ENTRANCE ASSESSMENT ROUTES ANALYSE MULTI-SENSORY VIEW POINTS

Tool 2: Accompanied walks
What new users would like to see improved

Method		Output
• Recruit participants • Conduct accompanied walks and record user experience	▶	Accompanied walk records Accompanied walk record examples A B C

Recruit participants

- Invite members of the community to accompany you on a woodland visit and ask them to 'walk and talk' through their experience.
- Target participants who are non- or infrequent users to gain fresh eyes, good insights and useful first impressions. The exercise can also be carried out with existing users for a different perspective of the informed visitor experience.
- Invite participants to take a route recommended by existing users (from the visitor questionnaire from **Tool 1: Ask the visitors**) or ask them to 'follow their nose'.

Conduct accompanied walks and record user experience

- Ask participants to describe the experience in detail as you walk. Describe the walk, starting from outside of the site and approaching the entrance on foot, noting or recording:
  - First impressions on approaching the entrance.
  - What the walk is like e.g. steep slope, high up, good views, dark and mysterious.
  - What can and can't be seen e.g. views or sightings of other people.
  - Likes/dislikes.
- Record the experience like a story with photographs (see Accompanied walk record examples A B C).
  A digital voice recorder can also be used to create an audio-visual record.
- Two staff members are needed – one to talk/listen/ask questions, the other to record user responses.
- Let participants lead the way and decide which way to go.
- Visual or audio-visual resources can be used for websites and leaflets to help users make informed choices.
- The information gathered from accompanied walks can provide useful data on issues such as tree and vegetation management e.g. if overgrown with bracken.
- As user experiences differ according to the season, it is recommended to capture winter and summer experiences.

ASK THE VISITORS ACCOMPANIED WALKS ROLE-PLAY ACTIONS & PRIORITIES
WOODLAND USER WAYFINDING VISITOR QUESTIONNAIRE USER EXPERIENCE
INFORMATION SIGNAGE GATEWAY EFFECT
ENTRANCE INVENTORIES PHOTO DOCUMENTARIES SUMMARY MAP INTERPRETATION
ROUTE MAP COMMUNITY VISITOR EXPERIENCE PLOTTING FOOTPATHS ANALYSE
ENTRANCE ASSESSMENT ROUTES ANALYSE MULTI-SENSORY VIEW POINTS

Tool 3: Role-play
Problems with wayfinding and information provision

Method	Output
• Identify wayfinding scenarios • Role-play and record user experience Role-play record **A**	A record of visitor wayfinding experience Role-play record example **B**
• Entrance assessment using the gateway effect checklist Gateway effect checklist **C** Gateway effect examples **D**	An inventory of entrances Entrance inventory examples **E**

This tool focuses on wayfinding activity and provides the analysis required for effective wayfinding assessment. It is designed for site staff* and can either be used to examine a known problem area (confirmed with **Tool 1: Ask the visitors** and **Tool 2: Accompanied walks**) or to identify what information is most needed and where.

Identify wayfinding scenarios

• Combine your own knowledge of the site with the data from questions 15–22 of the visitor questionnaire from **Tool 1: Ask the visitors**.

• Identify known or suspected wayfinding problems to structure a series of scenarios (i.e. wayfinding tasks) or identify test routes for wayfinding usability.

• Scenarios set the parameters for role-playing a specific wayfinding task. Write a series of scenarios e.g. 'Find entrance to Dunnottar Woods, following instructions in the health walks leaflet' or 'Using Callendar Woods leaflet and signage, find entrance closest to car park then find and follow the circular red route'.

• Scenarios should include the following wayfinding tasks:

  – find the site using directions given in leaflets and websites etc.

  – find the way to a particular entrance.

  – find a particular feature or attraction from the entrance.

• If possible, scenarios should include a task that goes through the site en route to somewhere else e.g. 'Find your way from 'Town Gate entrance through the woods to Dunnottar Castle".

*Community members may be invited to role-play as well as, but not instead of staff. Tool 3: Role-play is for staff to analyse wayfinding provision based on problems identified by Tool 1: Ask the visitor and Tool 2: Accompanied walks.

- Role-play the wayfinding experience primarily on foot. It is also recommended to role-play from different perspectives depending on which user-groups were identified by **Tool 1: Ask the visitor** (e.g. cyclists, horse riders).
- **Scenarios provide task-based, focused analysis demonstrating how one decision leads to the next.**

Role-play and record user experience

- Enact your wayfinding scenarios to produce a Role-play record 🅰
- Use the results to highlight the relationship between information, decisions and actions.
- Role-play records document your findings and highlight any problems and potential solutions.
- Walking through a role-playing task is a very effective way to assess the wayfinding experience. If role-playing from a cyclist or horse riding perspective, a voice recording device may be more practical than pen and paper.
- Follow this step-by-step role-playing method:

Role-playing method

Step 1: Information search
Search libraries, community centres, tourist information centres, newspapers, newsletters and websites to gather information about your site. Your search should also include publications and agencies that you would expect to have information about your site. Focus on:
- Directions
- Entrance/place names
- Destinations/features to walk to within the woods e.g. a walled garden

Step 2: Scenario walk-through
Walk through the chosen scenarios as if you are a first time user with no prior knowledge of the site. Include the following wayfinding tasks:
- Find your site using leaflets and websites etc. If some users drive to your site, it is useful to record driving and walking experiences. Follow the directions given by the various leaflets, brochures and other sources starting approximately 500 metres (or 5 minutes' drive away) from the entrance you are trying to find.
- Find your way to a particular entrance. Use information gained from **Tool 1: Ask the visitor** to decide which entrances to test.
- Use information provided on orientation boards, leaflets or brochures to find particular features or attractions from the entrance area.
- **Do not use your own knowledge – follow only directions or other visual cues provided.**

Step 3: Create a role-play record of the wayfinding experience
See Role-play record example 🅱 of Dunnottar Woods near Stonehaven.

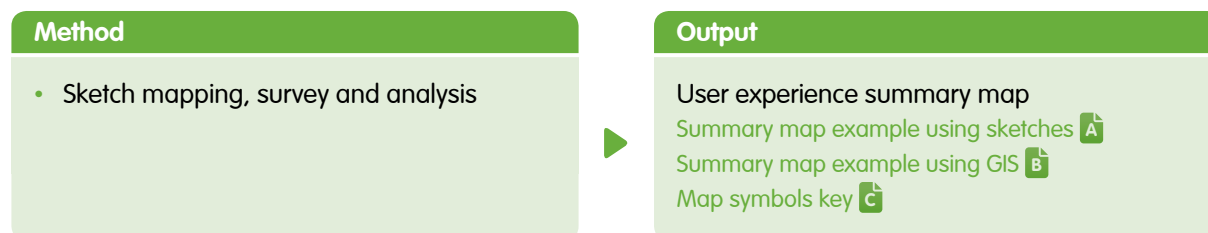# Entrance assessment using the gateway effect checklist

- Entrance assessment is part of the role-play process. The entrance is of key importance to the user experience, in particular for attracting new or infrequent users.
- Use Gateway effect checklist **C** to assess entrances and identify problems and potential improvements.
- See Gateway effect examples **D** for good and poor gateway effect.
- Summarise your assessment with an entrance inventory (see Entrance inventory examples **E**). This will help identify improvements or action points and form the basis of the work or design brief.
- Car park entrances must also be assessed for gateway effect – see Gateway effect examples **D** for examples. Observe driving behaviour to check the usability of entrances. Safety is a key consideration at driving entrances.

Tool 4: Pulling it together
A plan for action on a map

Method		**Output**
• Sketch mapping, survey and analysis	▶	User experience summary map Summary map example using sketches 🅰 Summary map example using GIS 🅱 Map symbols key 🅲

This tool uses information gathered from previous tools to review the user experience in detail and identify what should happen and where. It puts pen to paper and provides an opportunity to visualise and analyse where improvements can be made and what problems need to be solved. Mapping improvements and problems also informs your action and priority list (see **Tool 5: Actions and priorities**), including items for tree management plans. This tool should be applied at different times of year to record seasonal differences.

Sketch mapping, survey and analysis

- Walk different routes through your site and record the experience with symbols, diagrams and notes. These should include observations of visitor behaviour. See Summary map example using sketches 🅰
- Try using tracing paper on a large scale map to record your thoughts and observations.
- GIS is an alternative option for giving a visual overview. See Summary map example using GIS 🅱
- Use a cross reference number system to locate your observations on the map.
- Pay close attention to how the woodland shapes the user experience. A woodland walk is a sequence of 'small events' defined by changing views, a sense of space or a feeling of being enclosed.
- Record the experience using your own notes and symbols – see Map symbols key 🅲 for examples. Be expressive to convey how the woodland changes throughout the walk:
  - **Are there views** through trees and vegetation or any open and enclosed spaces? Are there views across the site or any long distance views? Where do trees open up and what type of views can be seen – wide expansive, or long and narrow?
  - **Is it a multi-sensory experience?** Record sights, sounds, smell and texture e.g. tree roots, sound of water.
  - Are there **problem spots** or is there any wayfinding confusion?
  - Is there **potential for a new feature?** Opening up a view or possible new place to sit?
  - Is it usable and **functional?** Note path condition, seats, steps, signs, handrails etc.
- Photos may be used to locate your observations, but your main observational tool is pen and paper.

Examples of ways of recording the woodland experience using symbols, notes and sketches
(Photos are used to illustrate where the observations were made)

Use symbols for different types of views e.g. broken glimpses.

Use symbols for different types of vegetation, creating sense of enclosure, and distinguish from walls, fences and other built elements.

Record the changing experience and how it feels e.g. if you feel compelled to stop and look as a space opens up.
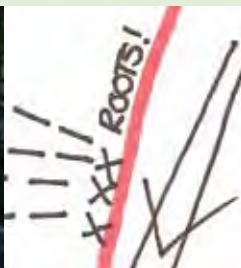
Some features are good and bad e.g. tree roots present an enriching experience for children, but may be an obstacle for older people.
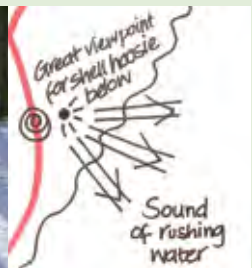
The sound of a river from a viewpoint of a historic feature may provide opportunity for a new stopping place and interpretation board.

Note user behaviour: is there any confusion over signs or information? Behavioural observations can highlight usability problems not raised on visitor questionnaires.

There may be other signs or trace evidence of human activity. Evidence of a well-trodden short cut can point to a problem with existing path layout.

Tool 5: Actions and priorities
An evidence based action plan

Method		Output	
• Collate user experiences User experience summary **A**	▶	Summarised user experiences User experience summary example **B**	
• Identify actions and priorities Actions and priorities plan **C**	▶	Actions and priorities plan Actions and priorities plan example **D**	

Collate user experiences

- Fill the User experience summary **A** with user comments from **Tool 1: Ask the visitors** (questions 12 and 13 of the visitor questionnaire) and **Tool 2: Accompanied walks**:
  - Divide comments into positive and negative.
  - Write comments in the most relevant category e.g. positive comments about seating and viewpoints would best suit 'Fresh air/nature/relaxation', negative comments about facilities for dogs would be relevant to the 'Walking the dog' section. See User experience summary example **B**
  - Some comments may be positive and negative e.g. 'Dogs off lead' could be positive for dog walkers or negative for families with young children.
  - Note that categories correspond with question 11 of the visitor questionnaire.

Identify actions and priorities

- The Actions and priorities plan **C** helps to identify why there is a need for action, what it might be and what priority it should be given. See Actions and priorities plan example **D**
  - Use the **Tool 1: Ask the visitor** section to list and prioritise suggestions and actions arising from question 14 of the visitor questionnaire.
  - Use the **Tool 2: Accompanied walks** section to list and prioritise actions arising from comments made on accompanied walks.
  - Use the **Tool 3: Role-play** section to list and prioritise actions addressing wayfinding and information provision.
  - Use the **Tool 4: Pulling it together** section to list and prioritise all other actions and tree management plans.

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