

Monitoring quality of experience

Results of additional TRI*M and segmentation analysis

April 2007



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Forestry Commission
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A. Summary of key findings

*TRI*M analysis*

Across the five sites included in the 2006 surveys, levels of satisfaction were found to be very high with the majority of visitors likely to recommend the site and likely to revisit. As such a TRI*M index of 106 was obtained across the five sites, ranging from 108 at Sherwood Pines Forest Park to 104 at both Delamere Forest and Garwnant Forest. These scores are similar to those obtained in other leisure destination surveys undertaken by TNS.

The TRI*M Grid analysis has identified the following general strengths which are present across all five sites and most visitor groups:

- Value for money.
- Opportunities to see wildlife.
- Opportunities to enjoy scenery and views.
- Opportunities to get fit and healthy.
- Solitude, peace and quiet.
- Opportunities to spend time with family and friends.

Also a key strength at Nant Yr Arian was the red kite hide. Analysis of the responses provided by different groups identified some variations in the strengths perceived by different visitors. Café facilities were likely to be perceived as a strength by those on a longer day trip, feeling safe in the forest was a strength for frequent visitors and cyclists, car park security was a strength for Empty Nesters and walkers while cycling trails were a strength for cyclists and Young Independents.

Across the five sites the following areas were identified as possible areas for improvement:

- Choice of paths for walking.
 - Café facilities.
 - Leaflets, maps and interpretation boards.
 - Provision of dog waste bins.
 - Provision of litter bins.
-

Also, the friendliness of staff was a potential issue amongst those on a day trip from home, frequent visitors and Empty Nesters while the clarity of signposting on paths was more of an issue for visitors on holiday and first time visitors.

Developing, improving and promoting the following aspects of the forests could help to increase levels of satisfaction beyond those currently achieved:

- Trails for cycling.
- Trails for other activities.
- Shop facilities.
- Availability and provision of information from staff.
- Printed information about the forest.

There may also be a demand amongst short duration and frequent visitors for improvements to children's play equipment, to promote Go-Ape to longer duration day visitors and to develop/ promote forest drives to holiday visitors.

Please bear in mind that this analysis covers five sites chosen by Forestry Commission for surveying in the period 26th July to 28th October 2006. Whilst these results cannot be taken as representative of all Forestry Commission sites, this analysis does highlight areas that may affect sites other than those covered by this report.

Segmentation analysis

The multi-variate segmentation analysis has identified the following groups most likely to participate in certain activities or rate certain aspects of the site as important:

Cycling participation – participation is highest amongst those aged under 44, men and those who do not live in the local area.

Dog walking – participation is highest amongst those with a season ticket/parking pass owners and women.

Visiting the café – participation is highest amongst women on day visits of 2 hours+ duration.

Go-ape – participation is highest amongst those aged under 32 who do not live in local area.

Walking to the site – participation is highest amongst local residents on day trips taken in July or September of 1 to 3 hours duration.

Rating shop as important – most likely to be rated as important by members of DE social classes.

Rating clean toilets as important – most likely to be rated as important by women and men aged 40 or over.

Rating paths for walking as important – most likely to be rated as important by women who visited in August.

Rating trails for cycling as important – most likely to be rated as important by men aged under 36.

Rating café as important – most likely to be rated as important by those aged 54 or over.

Rating dog waste bins as important – most likely to be rated as important by women aged 40 or over who visit in July or August.

Rating litter bins as important – most likely to be rated as important by women who visited in July or August.

Rating of feeling safe in the forest as important – most likely to be rated as important by repeat visit females on a short trip (<1 hour) to the forest.

Rating spending time with family and friends as important – most likely to be rated as important by females with children on a short trip (<1 hour) to forest.

Rating scenery and views as important – most likely to be rated as important by visitors aged 66 or over.

Rating wildlife as important – most likely to be rated as important by female visitors aged 66 or over.

Rating getting fit and healthy as important – most likely to be rated as important by those who own a season ticket or parking pass.

Definitely going to revisit site – local residents who own a season ticket/parking pass are most likely to revisit.

Definitely going to recommend site – repeat visitors to the site on a day trip of over 2 hours are most likely to recommend the site.

B. Background and introduction

Background

Forestry Commission (FC) forests and woodlands offer many recreation opportunities such as walking, cycling and picnicking, as well as more formalised activities such as mountain biking, horse riding, car rallies and orienteering. They also offer log cabins, camping and caravan accommodation, with a number of sites also equipped with a visitor centre. Printed material is produced in order to maximise the visitor experience and the FC is currently working alongside Ordnance Survey to incorporate information on land access into their maps.¹

In June 2002, TNS (then NFO) were commissioned to undertake a study which would investigate what constitutes quality of experience for visitors, addressing related concepts such as motivations, expectations and the needs of different groups. The output of this study was a survey method which could be used across Forestry Commission sites to effectively monitor quality of experiences.

Reflecting the increasing importance of community forests, TNS were commissioned in 2004 and 2005 to undertake surveys amongst residents of areas close to selected woodland sites in the Thames Chase and South Yorkshire areas. Research conducted at these sites employed a method developed from the on-site QOE approaches and investigated the profile of both users and non-users of the forests, the motivations and barriers to use, the benefits received from the forest and any improvements that could be made.

The *Forestry Commission Corporate Plan for England and Great Britain* identifies a need for further evidence to demonstrate the benefits that woodlands and forests bring to society and it is on this basis that the FC continued the QOE survey programme through a series of on-site and community surveys in England and Wales during 2006.

¹ 'Forestry Commission Corporate Plan for England and Great Britain Activities 2005/06' [http://www.forestry.gov.uk/pdf/gbengcorp2005.pdf/\\$FILE/gbengcorp2005.pdf](http://www.forestry.gov.uk/pdf/gbengcorp2005.pdf/$FILE/gbengcorp2005.pdf)

These surveys had the following key objectives

- to undertake on-site surveying of around 300 visitors per site at 5 sites in England and Wales in 2006;
- to undertake community surveys at a minimum of 300 households surrounding 2 community woodland areas, one in England, one in Wales in 2006;
- to provide full reports and data to FC.

Method

Visitors were interviewed at three Forestry Commission sites in England (Delamere, Hamsterley and Sherwood Pines forests) and two in Wales (Nant Yr Arian and Garwnant forests) between 26th July and 28th October 2006.

Visitors who used the site at least once a month were interviewed and asked to rate both the levels of importance of different aspects of woodland and forest visits and their satisfaction with the same aspects at each of the forests. Visitors who came less often were interviewed for a shorter period before being given a questionnaire regarding their levels of satisfaction. This was completed and returned, using a reply-paid envelope. Copies of the questionnaires used are appended.

A total of 1,145 visitors were interviewed and 299 self completion questionnaires were returned.

*TRI*M and segmentation analysis*

Detailed reports of the results obtained at each of the five sites included in the 2006 programme of research have been produced separately. This report provides the results of further TRI*M and segmentation analysis undertaken using the combined results of these surveys.

Please bear in mind that this analysis covers five sites chosen by Forestry Commission for surveying in 2006. Whilst these results cannot be taken as representative of all Forestry Commission sites, this analysis does highlight areas that may affect sites other than those covered by this report.

C. TRI*M analysis

A key objective of this survey was to identify issues relating to the quality of visitor experiences at the five Forestry Commission sites and priorities for improvements. In addition to the standard analysis of the responses to questions regarding satisfaction, the information collected from visitors to each of the forests was also analysed using TRI*M.

The TRI*M system has been developed by TNS to measure, manage and monitor customer relationships with products and services and, for the purposes of this study, it has been possible to adapt it to the 'product' offered by Forestry Commission sites.

The following sections provide details of the responses provided to the questions asked regarding the claimed importance of different aspects of the forest in decisions to visit, levels of satisfaction with these same elements and the results of the TRI*M analysis.

TRI*M Index

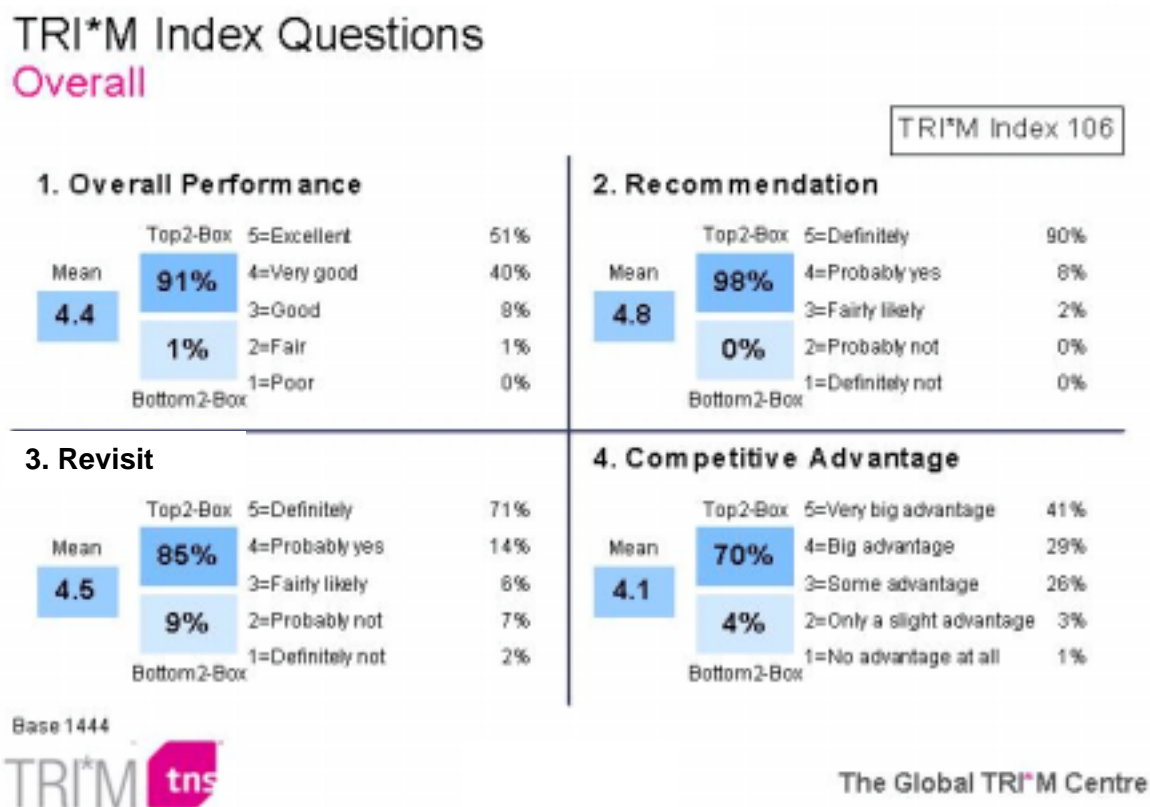
The TRI*M Index is a weighted calculation based on responses to the four following questions:

- How would you rate your visit to [forest name] overall? (*Overall performance*)
- Based on your experience, would you recommend [forest name] as a place to visit to a friend or relative? (*Recommendation*)
- Based on your experiences on this trip, would how likely are you to visit [forest name] again in the next few months? (*Revisit*)
- How would you rate [forest name] as a place to visit compared to the other forests, parks or outdoor recreation sites you could have gone to today instead? (*Competitive advantage*)

These four questions provide the TRI*M index score for overall visitor satisfaction (and the context within which all of the detailed satisfaction ratings are placed). TRI*M Index scores were also produced for each of the individual sites to benchmark each forest against the other sites included in the 2006 survey programme and could be used also be used as a benchmark score for future comparison.

Figure C-1 shows the overall results for each of these questions, as illustrated by the 4 quadrants in the diagram.

Figure C-1 – Overall satisfaction with Forestry Commission sites



The overall TRI*M index figure for the five Forestry Commission sites was **106**, a very high index that suggests overall satisfaction with visits to the forest were very high. The TRI*M index figures obtained each of the sites included in the 2006 survey were as follows:

- Sherwood Pines Forest Park – 108
- Delamere Forest - 104
- Hamsterley Forest - 106
- Nant yr Arian – 107
- Garwnant – 104

The overall satisfaction data shows that the majority of visitors rated their trip very highly, with just over half (51%) claiming it was 'excellent' and a further 40% claiming that it was 'very good'. In addition to this high satisfaction with their trip, nine in ten visitors stated that they would 'definitely' recommend a visit to the forest visited (90%).

A high proportion of visitors would return to the forest visited with approximately seven in ten visitors indicating that they would 'definitely' return (71%). When asked how the forest

compared to other outdoor recreation sites, most of the sample stated that the forest they visited does have an advantage over alternative sites, with approximately a two-fifths claiming the site had a 'very big' advantage (41%) and 29% claiming that it had a 'big' advantage. A further 26% of the sample saw the forest visited as having only 'some' advantage over other sites which could have been visited.

All of the scores are very high which is encouraging and suggests that most people enjoy their visits to Forestry Commission sites, they would highly recommend them as a place to visit, would return for another visit and are likely to perceive these sites as a better place to visit than other, alternative outdoor recreation sites.

While this survey is the first to use TRI*M to measure the quality of experience to forest sites, TNS Travel and Tourism have undertaken a number of other studies recording satisfaction levels in other leisure destinations.

In a recently completed study for a major coastal visitor attraction where most of the visitor's time was likely to be spent outdoors, an overall index of 95 was obtained. While this score was lower than that obtained across Forestry Commission sites, this was mainly due to a lower proportion of respondents expecting to revisit, a reflection of the proportion of overseas visitors included in the sample. Amongst respondents who lived in the local area, a more comparable TRI*M index of 102 was obtained. By comparison a score of 109 was obtained amongst respondents to the Forestry Commission sites who were on a short trip of less than 1 hour from home.

In another survey undertaken in 2006 involving interviewing in urban and rural destinations across a region of the UK, a TRI*M index of 95 was also obtained across all respondents, including overseas visitors. However, the index amongst residents of the local area was again more comparable to the Forestry Commission score at 108.

While it is difficult to draw conclusions from these comparisons, the similar scores obtained in each of these surveys suggest that satisfaction levels in Forestry Commission sites are, at least, 'on a par' with those recorded in other major leisure destinations.

TRI*M Typology

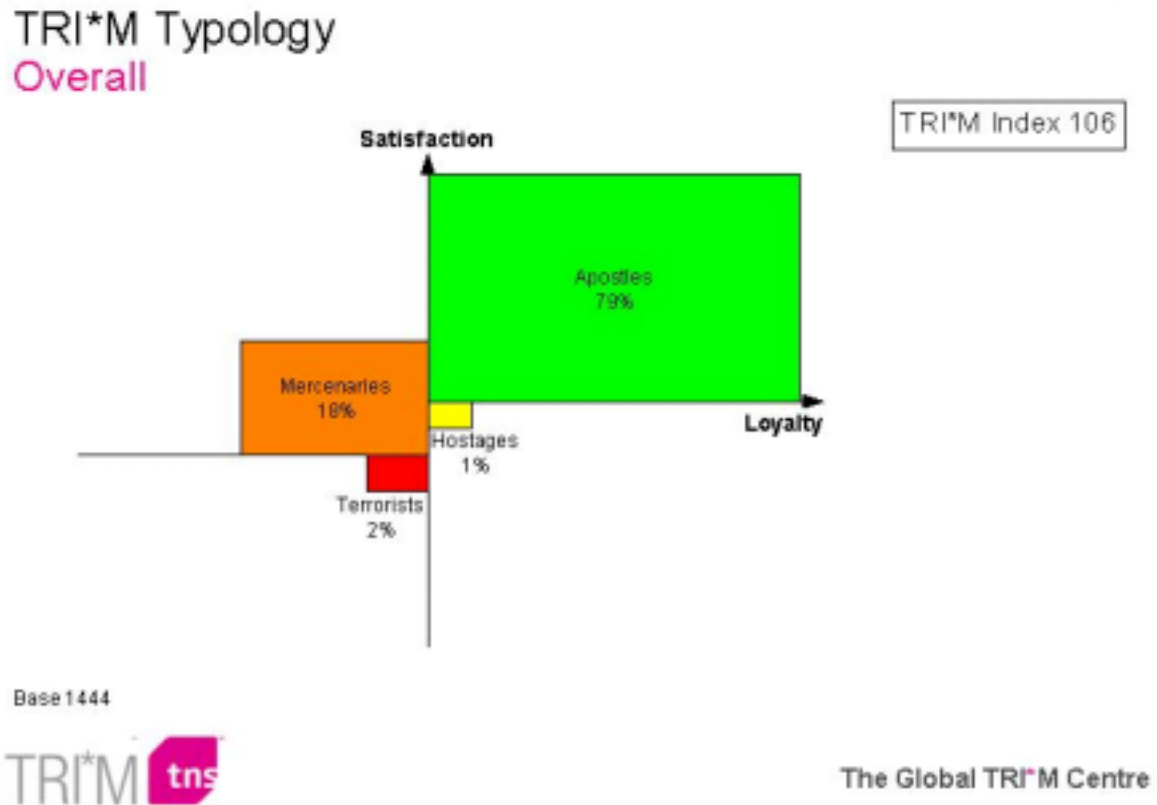
The next stage of the TRI*M analysis involved the categorisation of all respondents into four different groups. This categorisation is based upon responses to the four key questions (as described earlier) with respondents classified by level of satisfaction, based upon their overall performance and recommendation responses, and levels of loyalty, based upon their repeat visit and competitive advantage responses.

The four groups are as follows:

- *Apostles* – visitors with high levels of satisfaction and loyalty. Visitors essential to the long term success of the site. The focus should be on how to retain these visitors.
- *Hostages* – visitors with lower levels of satisfaction than Apostles but high levels of loyalty. These visitors may be visiting the site due to a lack of alternatives or barriers to travel elsewhere. The focus should be on how to satisfy these visitors, to ‘move’ them to the Apostles group.
- *Mercenaries* – visitors with high levels of satisfaction but low levels of loyalty. Typically these types of visitors are always looking for better options and are likely to visit a range of different locations to take part in outdoor recreation. The focus for this type of visitors should be to identify what will engender loyalty.
- *Terrorists* – visitors with low levels of satisfaction and low levels of loyalty. These types of visitors are actively disruptive via negative word of mouth.

As Figure C-2 overleaf illustrates, the majority of visitors to the five forests (79%) were categorised into the Apostles grouping i.e. both satisfied and loyal. Most of the remainder (18%) were classified as Mercenaries (satisfied but not loyal), with small proportions classified as Terrorists (neither satisfied nor loyal, 2%) and Hostages (not satisfied but loyal, 1%).

Figure C-2 – Visitors to Forestry Commission sites - TRI*M Typology



Visitors identified as Apostles (both satisfied and loyal) were significantly more likely than those classified as Mercenaries (satisfied but not loyal) to visit the site 1 to 3 times per month (51% v 20%). Conversely, Mercenaries were more likely to have visited between 1 and 3 times in the past year (44% v 8% Apostles).

TRI*M Grid

The third stage of the TRI*M analysis combined responses to a series of importance and satisfaction ratings with the TRI*M index which was derived for each respondent on the basis of the four key questions described previously.

To produce each TRI*M grid, each of the aspects was given a relative value in terms of the following three dimensions:

- *Levels of claimed importance* –this measurement provides an indication of the aspects that visitors believe to be most important in their decision to visit, those which should be reinforced in marketing communications.
- *Impact on experience* – this measurement is statistically derived from an analysis of the correlation of each aspect's performance (i.e. levels of satisfaction reported) with the TRI*M index. If there is positive correlation between the TRI*M index and the performance of a particular aspect, it is rated as having a high impact on quality of experience. Conversely if there is no correlation between the TRI*M index and the performance of an aspect, it is rated as having a low of impact on quality of experience.
- *Levels of satisfaction* – this measurement provides an indication of the relative performance of each of the aspects which were rated. This measurement provides an indication of areas which require improvement.

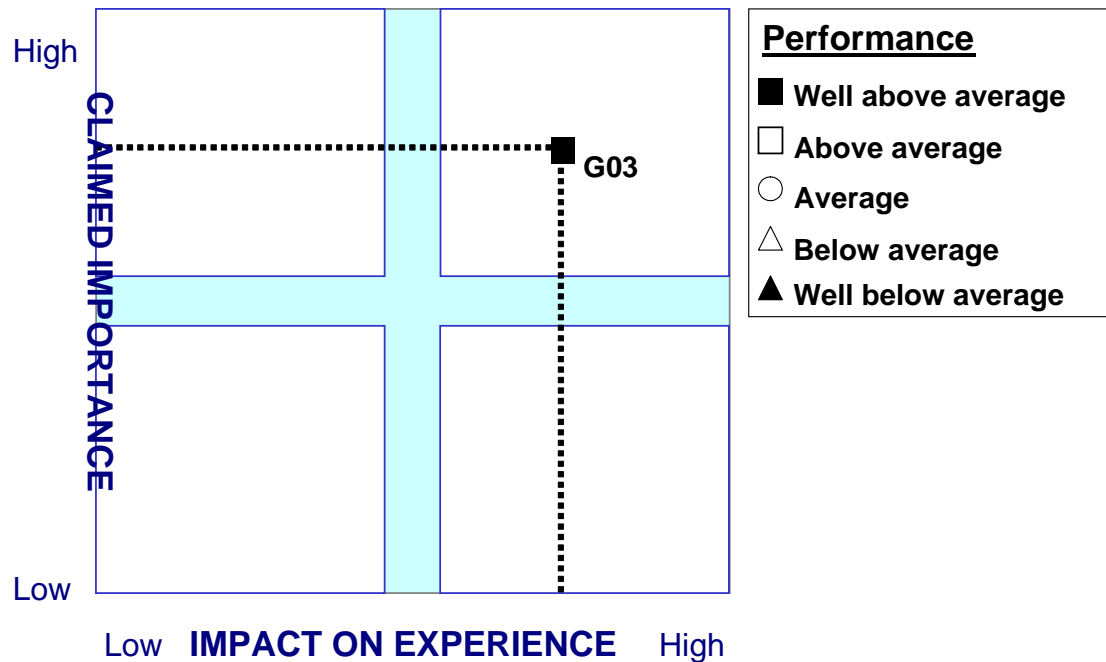
In the following TRI*M grids, each of these three dimensions are plotted as follows:

Levels of claimed importance - this score is displayed on the vertical axis which runs along the left hand side of the grid. The closer to the top of the grid, the higher the claimed importance and the closer to the bottom of the grid, the lower the claimed importance.

Impact on experience - this measurement is displayed on the horizontal axis which runs along the bottom of the grid. The further to the right of the grid the higher the impact on the quality of experience, the further to the left of the grid the lower the impact on quality of experience.

Levels of satisfaction – the previous two dimensions (claimed importance and impact on experience) tell us where on the grid each attribute falls. On the example below these are represented by the dotted lines. Where the two dotted lines cross is where on the grid the aspect of the forest is located. The third dimension is levels of satisfaction, the measurement of performance. The average satisfaction score respondents gave to each aspect is displayed by the shape plotted on the grid, for example the filled in square on the grid below. This tells us how well the forest is performing on each attribute. In the

hypothetical example below the attribute **G03** has fairly high claimed importance (because it is near the top of the grid), a fairly high impact on experience (as it is to the right of the grid) and its performance is well above average (because it has a filled in square).



A total of 28 aspects have been rated by respondents. The results of the TRI*M Grid analysis can provide an insight into which ones should be priorities for improvement or marketing. Each aspect's impact on experience rating should be considered to be a higher priority than claimed importance rating as this measure has a direct relationship to overall levels of satisfaction. As such, aspects that are further to the right on the grid should be considered as higher priorities. However, claimed importance also has some bearing so things that are towards the top of the grid also have some priority.

Over the following pages TRI*M grids have been provided for all visitors to all five forests and sub groups of visitors selected on the basis of type of trip, activities undertaken and lifestyle. All of the findings are based on the data collected across all five sites – the results for each individual site are reported in the individual site reports.

Summary of key TRI*M findings - all visitors

The TRI*M Grid analysis for all visitors across all five sites combined has highlighted the following key drivers of quality of experience and potential areas for improvement at this 'top line' level:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. Across the five sites, the main strengths were:

- value for money of the trip/day out;
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- being able to get fit and healthy;
- solitude, peace and quiet;
- the Red Kite hide (Nant Yr Arian);
- being able to spend time with family and friends.

It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Across the sites surveyed in 2006, the following aspects received a lower performance rating so should be considered a priority:

- choice of paths for walking;
- café facilities;
- leaflets, maps and interpretation panels.

Second priority issues – there are a number of attributes which, although most visitors rated them as important, were found to actually have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing below average:

- dog waste bins;
 - litter bins.
-

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category were:

- the choice of trails for activities other than cycling;
- the shop;
- the availability of staff on site;
- the choice of trails for cycling;
- information provided by staff and printed information about the forest.

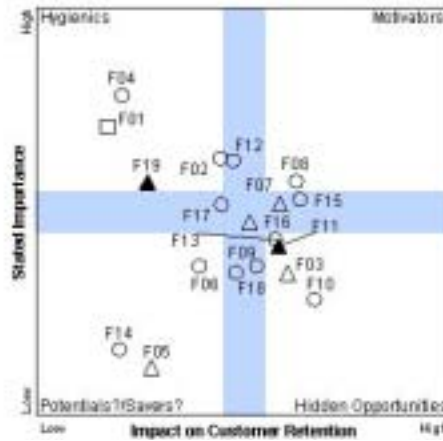
Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc.
- F19 Dog waste bins

Base 1444



FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

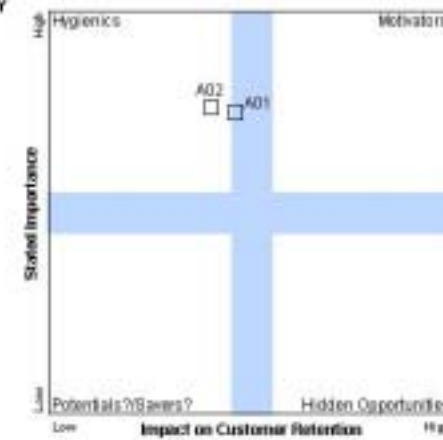
Base 1444



ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

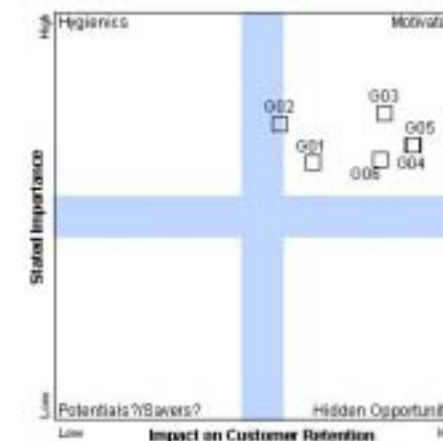
Base 1444



GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 1444



Summary of key TRI*M findings - trips of less than 1 hour from home

The TRI*M Grid analysis for those on a short trip of less than an hour from home highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For those on a short trip of less than an hour from home, the main strengths were:

- value for money of the trip;
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- being able to get fit and healthy;
- solitude, peace and quiet;
- the Red Kite hide (Nant Yr Arian);
- being able to spend time with family and friends.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so should be considered a priority:

- the friendliness of staff;
- the choice of paths for walking;
- the café or restaurant.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average :

- dog waste bins;
 - litter bins.
-

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category are:

- leaflets, maps and interpretation panels;
- children's play equipment;
- information provided by staff;
- open grassy areas;
- the shop;
- the friendliness of staff;
- the choice of trails for other activities;
- the showers.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 874

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 874

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

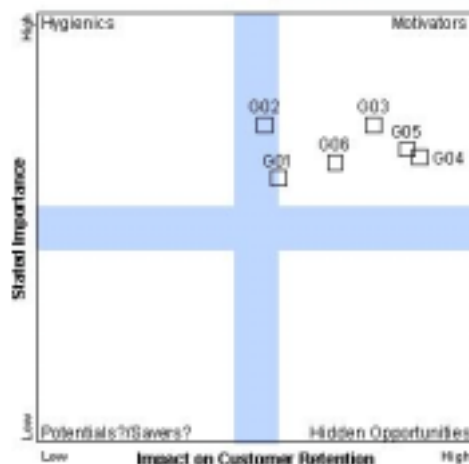
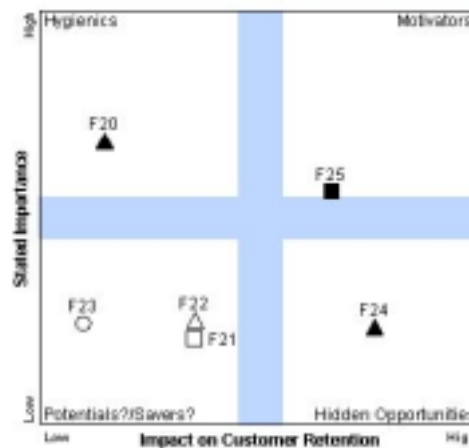
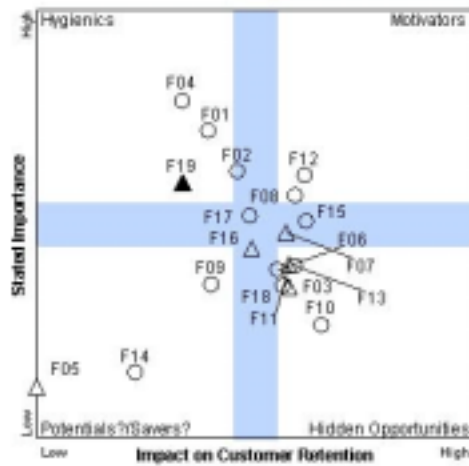
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 874

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 874



Performance

- Far above average
- Above average
- Average
- △ Below average
- ▲ Far below average

Summary of key TRI*M findings - day trippers

The TRI*M Grid analysis for those on a day trip of at least an hour in duration highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For those on a longer short trip or day out from home, the main strengths were:

- the café or restaurant;
- being able to get fit and healthy;
- the value for money of the trip;
- being able to enjoy the scenery and views;
- the Red Kite hide (Nant Yr Arian);
- being able to spend time with family and friends.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so should be considered a priority:

- choice of trails for walking;
- leaflets, maps and interpretation panels;
- solitude, peace and quiet.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average :

- dog waste bins;
- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for this type of visitor were:

- baby changing facilities;
- the availability of staff on-site;
- the choice of trails for cycling;
- the shop;
- the choice of trails for other activities;
- the 'Go Ape' course (Delamere and Sherwood Pines);
- the bike wash.

Of these, the availability of staff on-site was found to be performing well below average, while the 'Go Ape' Course was performing well above average. Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Go Ape course is only available at Delamere and Sherwood Pines Forests and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites. This also applies to the Red Kite Hide, which is only available at Nant Yr Arian.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 323

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 323

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

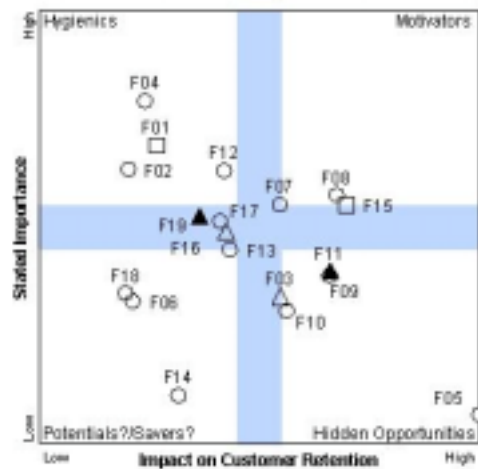
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 323

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 323



Summary of key TRI*M findings - holidays

The TRI*M Grid analysis for those on holiday highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For those on holiday, the main strengths were;

- the Red Kite hide (Nant Yr Arian);
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- being able to get fit and healthy;
- value for money of the trip.

It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so should be considered a priority:

- clear signposting on footpaths;
- leaflets, maps and interpretation panels;
- printed information about the forest.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- dog waste bins;
- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the

overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for this type of visitor were:

- the choice of trails for cycling;
- open grassy areas;
- a forest drive;
- the bike wash.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 245

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 245

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

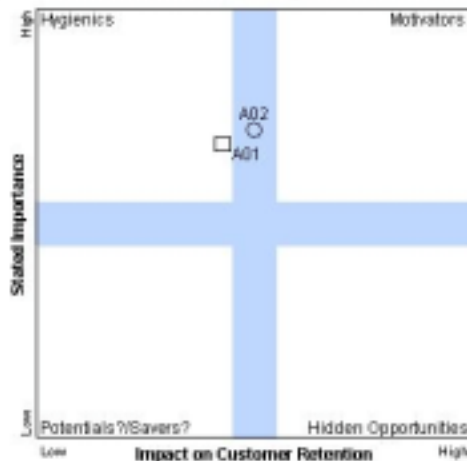
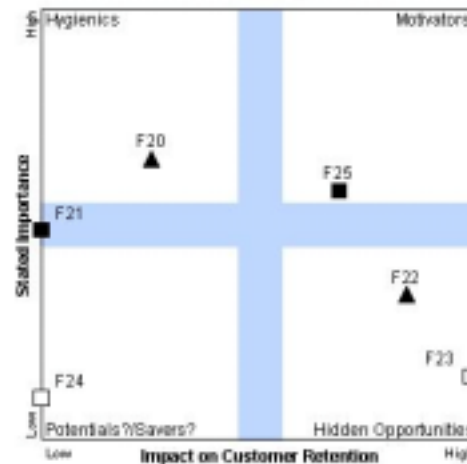
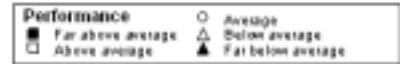
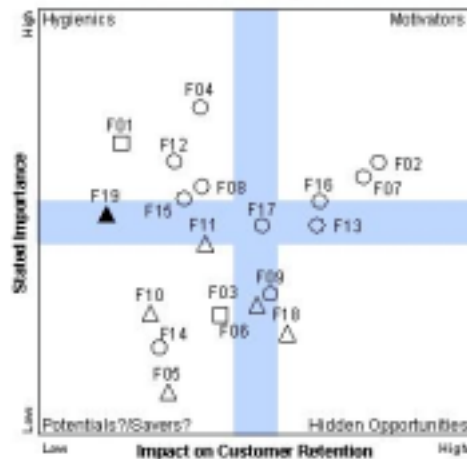
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 245

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 245



Summary of key TRI*M findings – first time visitors

The TRI*M Grid analysis for first time visitors highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For first time visitors, the main strengths were:

- the Red Kite hide (Nant Yr Arian);
- being able to get fit and healthy;
- being able to enjoy the scenery and views;
- being able to enjoy the wildlife;
- value for money of the trip;
- being able to spend time with family and friends.

It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so these should be considered a priority in maintaining current levels of satisfaction:

- leaflets, maps and interpretation panels;
- clear signposting on footpaths;
- the choice of paths for walking;
- printed information about the forest;
- solitude, peace and quiet.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- the dog waste bins;
-

- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for first time visitors were:

- the choice of trails for cycling;
- open grassy areas;
- baby changing facilities;
- a forest drive;
- the bike wash.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

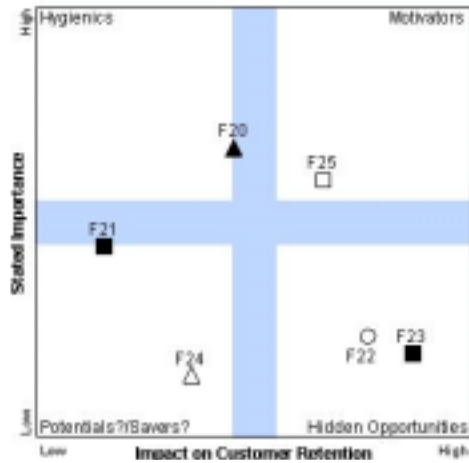
Base 421



FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

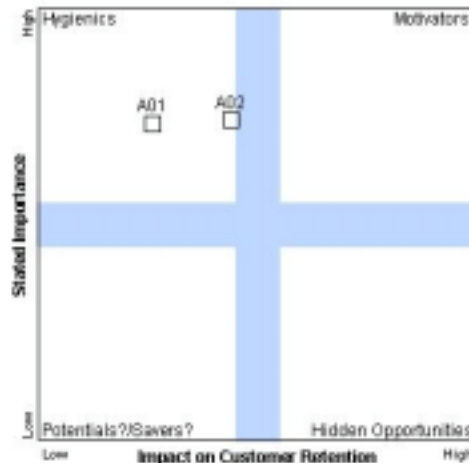
Base 421



ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

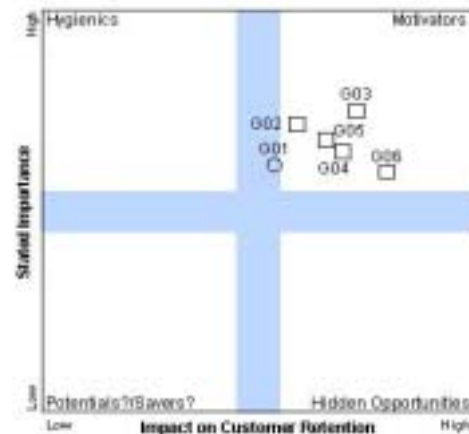
Base 421



GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 421



Summary of key TRI*M findings – frequent visitors

The TRI*M Grid analysis for frequent visitors highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For frequent visitors, the main strengths were:

- the Red Kite hide (Nant Yr Arian);
- value for money;
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- solitude, peace and quiet;
- feeling safe in the forest.

It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so should be considered a priority:

- enough car parking;
- the friendliness of staff;
- the café received.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- dog waste bins;
- litter bins.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the

overall quality of experience of those who rated them. Across the five sites, the aspects included in this category were:

- the shop;
- children's play equipment;
- the choice of trails for other activities;
- open grassy areas;
- showers;
- the 'Go Ape' course (Delamere and Sherwood Pines).

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Go Ape course is only available at Delamere and Sherwood Pines Forests and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites. This also applies to the Red Kite Hide, which is only available at Nant Yr Arian.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 432

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 432

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

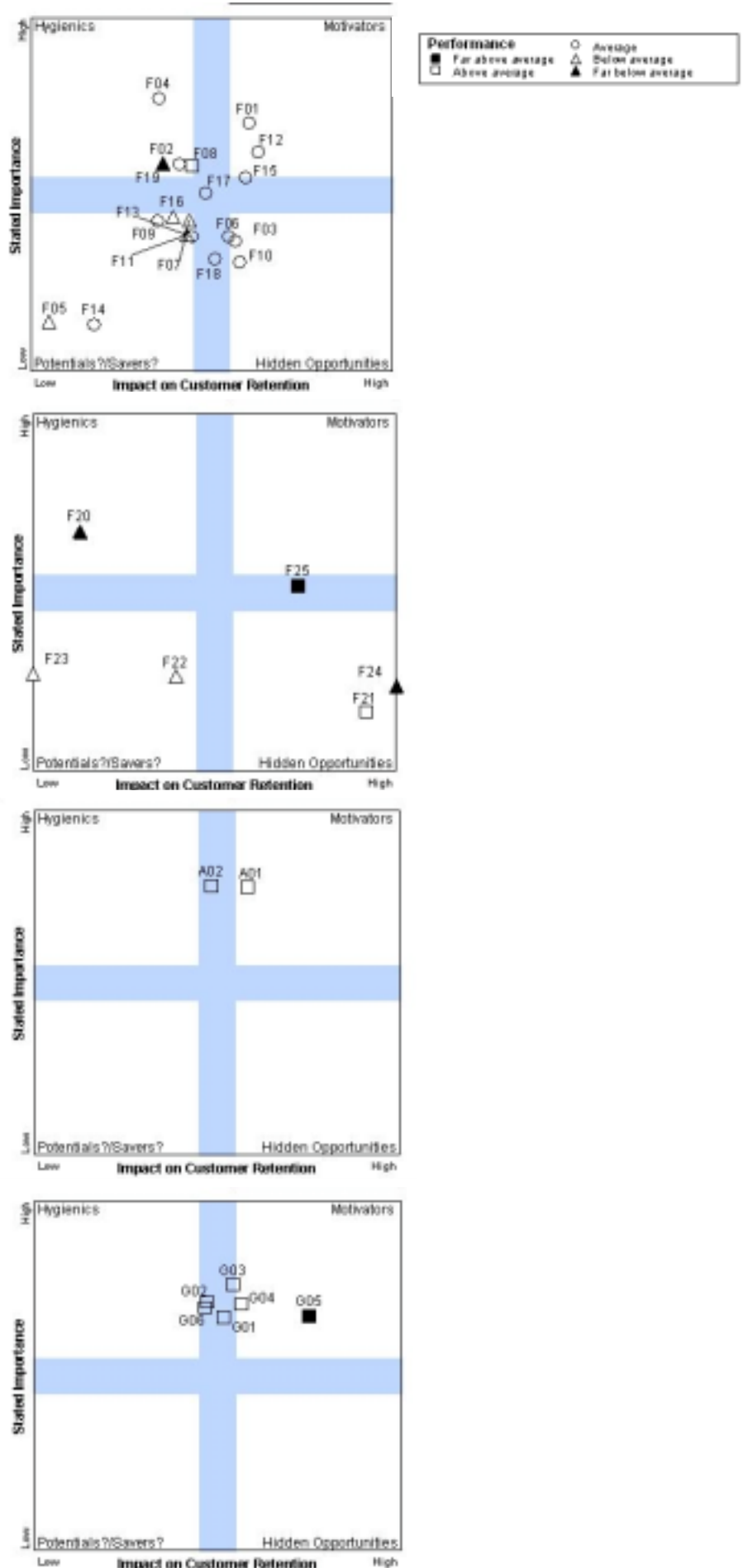
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 432

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 432



Summary of key TRI*M findings – dog walkers

The TRI*M Grid analysis for dog walkers has highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. Amongst dog walkers, the main strengths were:

- the choice of paths for walking;
- value for money;
- being able to get fit and healthy;
- being able to enjoy the scenery and views.

It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspect received a lower performance rating so should be considered a priority:

- clear signposting on paths.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- the dog waste bins;
- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for dog walkers were:

- printed information about the forest;
-

- a shop;
- baby changing facilities;
- the 'Go Ape' course (Delamere and Sherwood Pines);
- the bike wash.

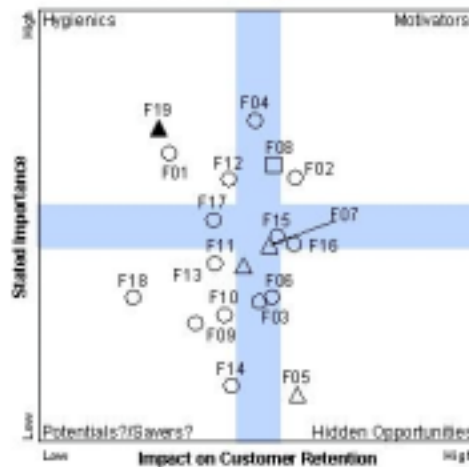
Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Go Ape course is only available at Delamere and Sherwood Pines Forests and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 260



FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers *
- F25 Red kite hide

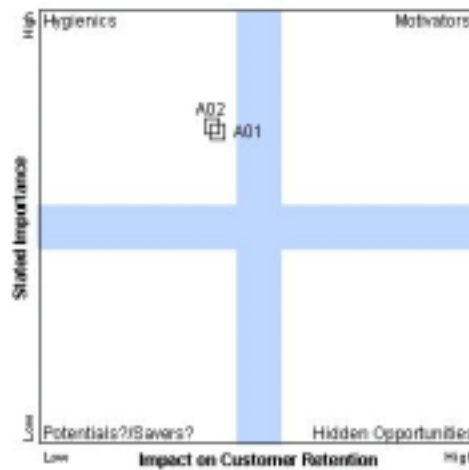
Base 260



ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

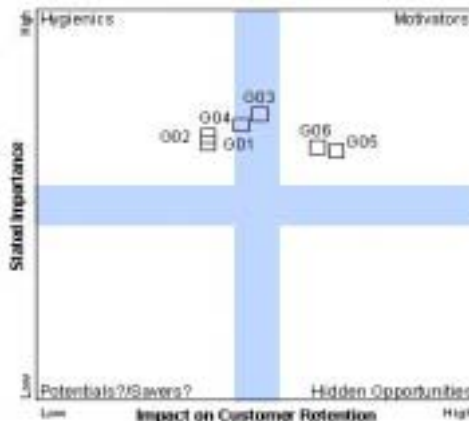
Base 260



GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 260



Summary of key TRI*M findings – walkers without a dog

The TRI*M Grid analysis for walkers without a dog has highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For other walkers, the main strengths were:

- the Red Kite hide (Nant Yr Arian);
- value for money;
- being able to get fit and healthy;
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- solitude, peace and quiet;
- being able to spend time with family and friends;
- feeling happy to leave their car in the car park.

Of these, the Red Kite Hide, value for money, the scenery and views and being able to spend time with family and friends were performing far above average. It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so should be considered a priority in maintaining current levels of satisfaction:

- the friendliness of staff;
- the choice of paths for walking.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- the dog waste bins;
- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for other walkers were:

- information provided by staff, the availability of staff on-site:
- the choice of trails for other activities.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 703

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 703

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

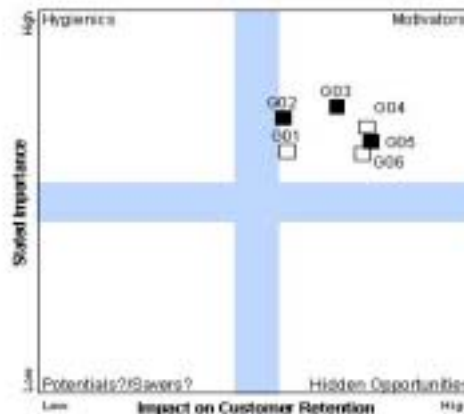
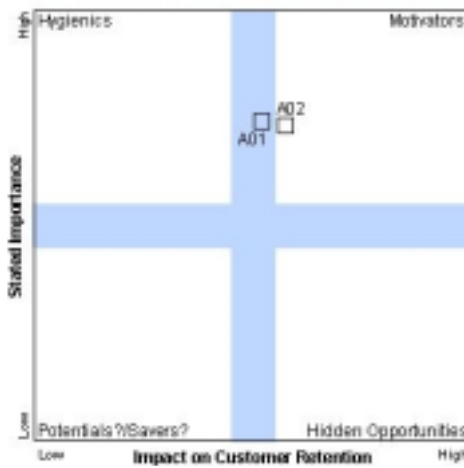
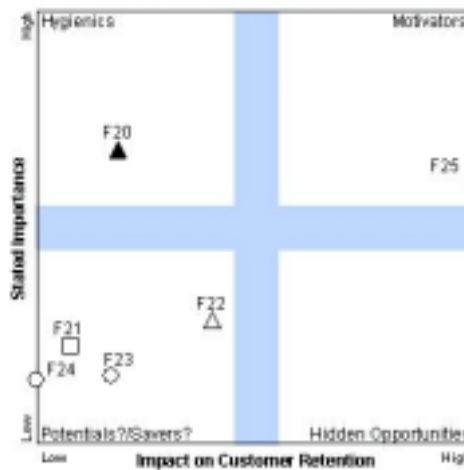
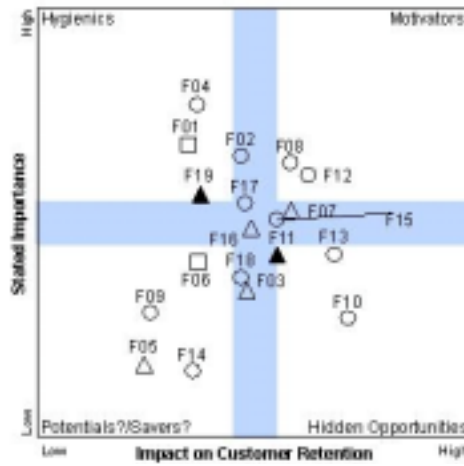
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 703

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 703



Summary of key TRI*M findings – cyclists

The TRI*M Grid analysis for cyclists (across all five sites combined) has highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For cyclists, the main strengths were:

- the choice of trails for cycling;
- value for money;
- being able to get fit and healthy;
- being able to enjoy scenery and views;
- being able to spend time with family and friends;
- feeling safe in the forest.

Of these, value for money and being able to spend time with family and friends were performing far above average. It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, these aspects received a lower performance rating so these should be considered a priority in the management of these and maintaining current levels of satisfaction:

- leaflets, maps and interpretation panels;
- the café;
- being able to enjoy the wildlife.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing below average:

- the dog waste;
-

- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for cyclists were:

- the choice of paths for walking;
- information provided by staff;
- the availability of staff on-site;
- the shop;
- the choice of trails for other activities;
- the Red Kite hide (Nant Yr Arian).

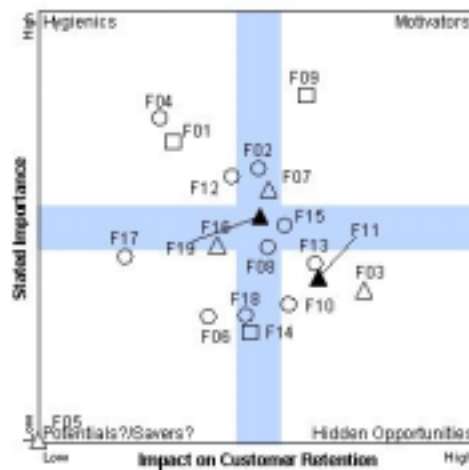
Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

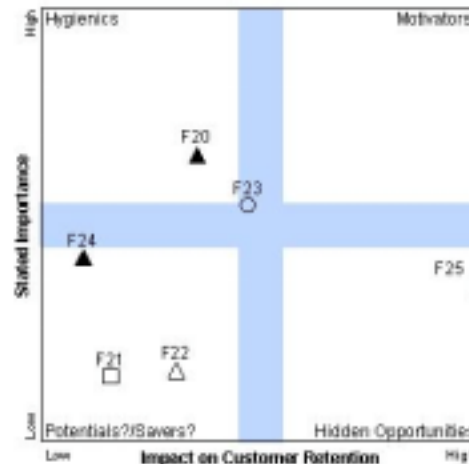
Base 351



FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

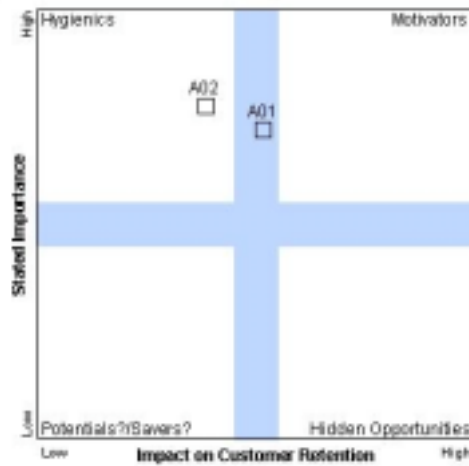
Base 351



ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

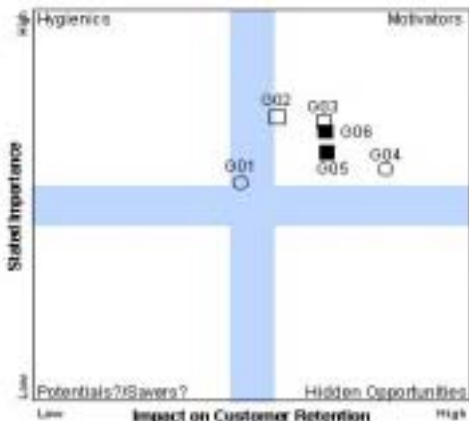
Base 351



GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 351



Summary of key TRI*M findings – Young Independents

The TRI*M Grid analysis for Young Independents has highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For Young Independents, the main strengths were:

- the choice of trails for cycling;
- being able to get fit and healthy;
- value for money;
- the scenery and views and solitude;
- peace and quiet.

Of these, being able to get fit and healthy performed far above average. It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so these should be considered a priority in maintaining current levels of satisfaction:

- leaflets, maps and interpretation panels;
- being able to enjoy the wildlife.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, one was found to be performing far below average – the litter bins. This should be considered as a second priority in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for Young Independents were:

- the availability of staff on-site;
- the choice of trails for other activities;
- baby changing facilities.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 199

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 199

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

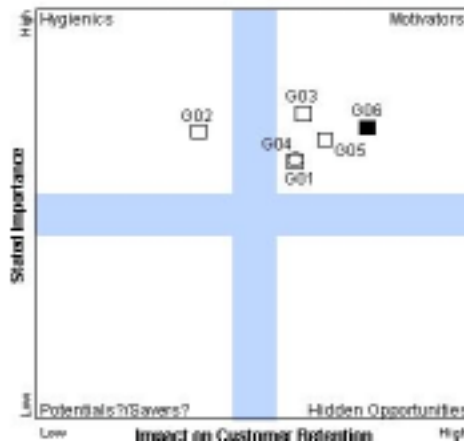
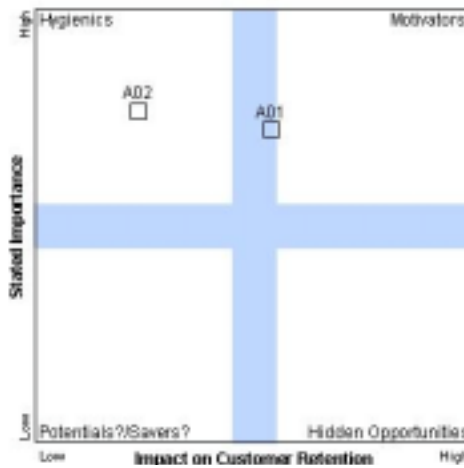
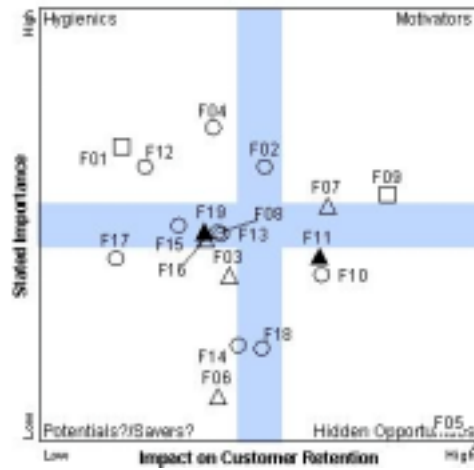
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 199

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 199



Summary of key TRI*M findings – Families

The TRI*M Grid analysis for those in the Family lifecycle highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For Families, the main strengths were:

- value for money;
- being able to get fit and healthy;
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- being able to spend time with family and friends.

Of these, being able to spend time with family and friends performed far above average. It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so these should be considered a priority:

- picnic areas;
- the choice of paths for walking;
- the friendliness of staff and solitude;
- peace and quiet.

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- the dog waste bins;
- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category were:

- the choice of trails for cycling and other activities;
- the bike wash;
- forest drive;
- showers.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

Base 587

FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

Base 587

ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

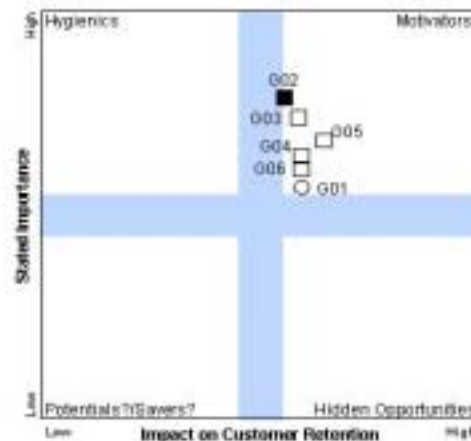
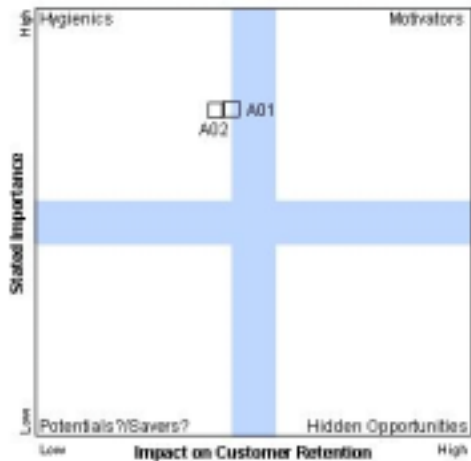
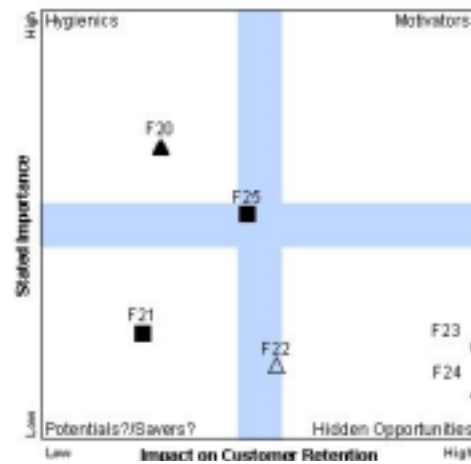
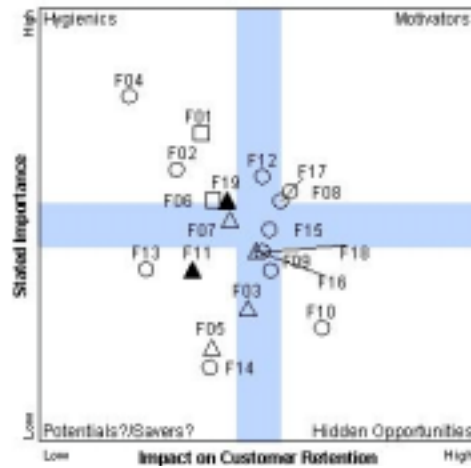
- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

Base 587

GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 587



Summary of key TRI*M findings – Empty Nesters

The TRI*M Grid analysis for those in the Empty Nesters lifecycle highlighted the following key drivers of quality of experience and potential areas for improvement:

Strengths – these are the attributes of the sites which are considered as important amongst most visitors, are proven to have a high impact on overall levels of satisfaction and are currently performing well. For Empty Nesters, the main strengths were:

- the Red Kite hide (Nant Yr Arian);
- feeling happy to leave their car in the car park;
- value for money;
- being able to enjoy the wildlife;
- being able to enjoy the scenery and views;
- being able to get fit and healthy.

Of these, value for money performed far above average.

It is vital that these strengths are maintained and communicated in promotional materials.

Immediate, top priority issues – these are attributes of the sites which are considered to be important amongst most visitors, have an impact on overall levels of satisfaction but are currently performing below average. Amongst these visitors, the following aspects received a lower performance rating so should be considered a priority:

- the friendliness of staff;
 - clear signposting on footpaths;
 - the choice of paths for walking;
 - the café;
 - leaflets, maps and interpretation panels;
 - printed information about the forest.
-

Second priority issues – there are a number of attributes of the sites which, although most visitors rated them as important, were found to have less impact on overall levels of satisfaction. Of these attributes, two were found to be performing far below average:

- the dog waste bins;
- litter bins.

These should be considered as second priorities in maintaining levels of satisfaction.

Future opportunities – these are attributes which, although most visitors do not perceive them as important in their decision to visit, have been proven to have an impact on the overall quality of experience of those who rated them. Across the five sites, the aspects included in this category for Empty Nesters were:

- information provided by staff;
- the availability of staff on-site;
- a shop;
- the choice of trails for other activities.

Investing and improving these facilities in the future will provide opportunities to develop levels of satisfaction beyond those currently achieved.

Please bear in mind that the Red Kite Hide is only available at Nant Yr Arian and that in the combined analysis, this has been rated in relation to other aspects that apply to all five sites.

FACILITIES IN DECISION TO VISIT SITE

- F01 Enough car parking
- F02 Clear signposting on footpaths
- F03 A Shop
- F04 Clean toilets
- F05 Baby changing facilities
- F06 Children's play equipment
- F07 Leaflets, maps and interpretation panels to help you find your way around
- F08 Choice of paths for walking
- F09 Choice of trails for cycling
- F10 Choice of trails for other activities (e.g. horse riding)
- F11 Availability of staff at the site (e.g. rangers)
- F12 Friendliness of staff
- F13 Information provided by staff
- F14 Availability of cycle hire on-site
- F15 Cafe or restaurant
- F16 Printed information about the forest
- F17 Picnic areas
- F18 Open grassy areas for ball games, sunbathing, etc
- F19 Dog waste bins

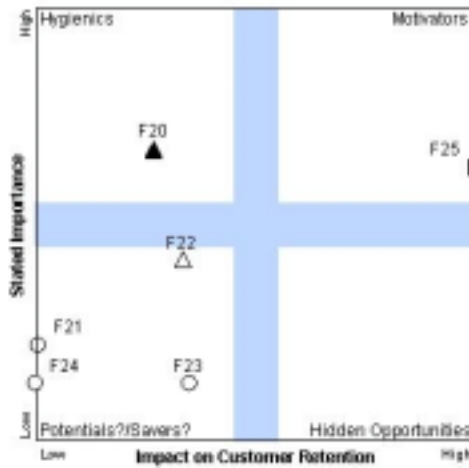
Base 572



FACILITIES IN DECISION TO VISIT SITE

- F20 Litter bins
- F21 Go Ape course
- F22 A forest drive
- F23 Bike wash
- F24 Showers
- F25 Red kite hide

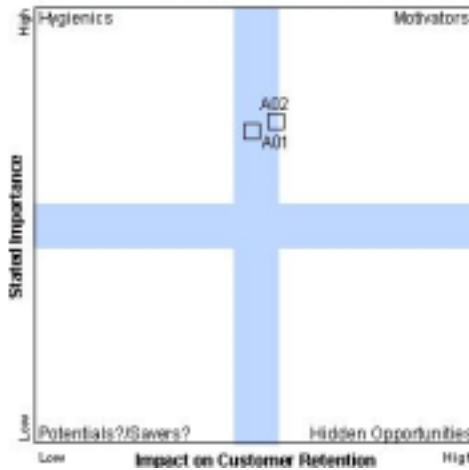
Base 572



ASPECTS OF PERSONAL SAFETY AND SECURITY IN DECISION TO VISIT

- A01 Feeling safe in the forest
- A02 Feeling happy to leave your car in the car park

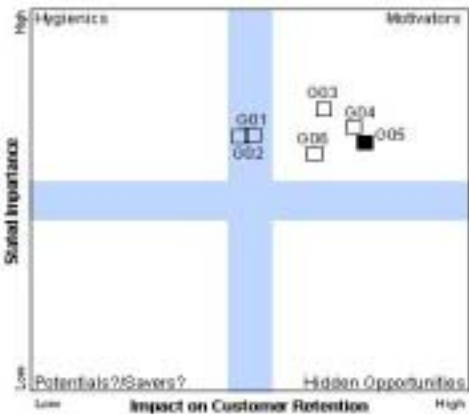
Base 572



GENERAL ASPECTS IN DECISION TO VISIT

- G01 Solitude, peace and quiet
- G02 Being able to spend time with family and friends
- G03 Being able to enjoy scenery and views
- G04 Being able to enjoy the wildlife
- G05 Value for money of your whole trip or day out
- G06 Being able to get fit and healthy

Base 572



D. Market segmentation – multivariate analysis

To obtain a greater understanding of different segments of visitors using each of the forest sites included in the 2006 programme of research and the factors influencing their decisions to visit, further analyses of the results have been undertaken using multi-variate analysis.

Multivariate analysis permits detailed analysis of the survey results by identifying the segments most likely to provide certain responses in the survey – for example the groups most likely to state that they took part in a specific activity or to rate a certain attribute of the site as important in their decision to visit. This analysis was undertaken using the segmentation program SPSS Answer Tree.

Using SPSS Answer Tree, segmentation is based around a single *dependent* variable and a number of *predictor* variables. In summary, the technique followed in undertaking segmentation analysis for the Quality of Experience study was as follows:

1. A series of *dependent variables* to be investigated were selected. For this study, dependent variables relating to transport, activities, factors influencing the decision to visit and satisfaction levels were used.
2. Each of these dependent variables were analysed using a standard set of *predictor variables* which included respondent demographics (sex, age, social class, children in household and disabilities), place of residence, frequency of visits to the site, car ownership, season ticket ownership and month of visit.
3. On this basis significant *market segments* were defined and ranked according to levels of penetration, allowing those which were most and least likely to have provided a specific response to be identified.

The following pages detail the key results of those analyses which provided the most significant outputs. Each analysis is presented using a tree diagram which illustrates the profile of the total survey sample with different segments colour coded as follows:

Yellow – the single segment most likely to have undertaken the specified activity or to have provided a specific response e.g. the segment most likely to have cycled during their visit.

Orange – other segments more likely than the overall average to have undertaken this activity or given the specified response.

Grey – all other groups of respondents who are either equally likely or less likely than the overall average to have undertaken the specified activity or given the specified response.

Activities undertaken – Cycling

As the chart below illustrates, 24% of all respondents took part in cycling overall. Age was the most significant variable in predicting levels of participation in this activity with 35% of those aged under 44 participating compared to 21% aged 44 to 53, 12% aged 54 to 59 and 7% of those aged 60 or over.

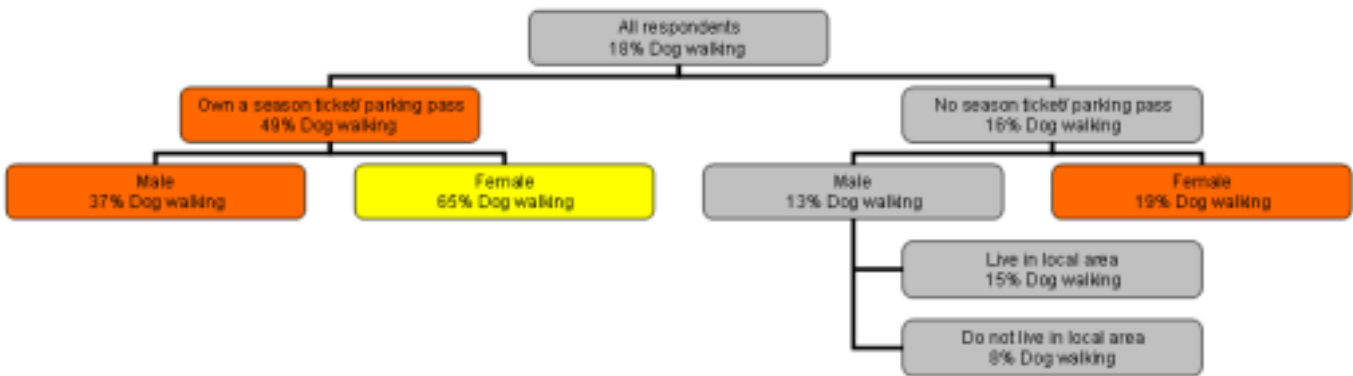
Overall the segment most likely to participate in cycling were men aged under 44 without children in their household who did not live in the local area, 66% of whom took part in cycling.



Activities undertaken – Dog walking

Overall 18% of respondents took part in dog walking. The predictor variable most closely related to participation in this activity was season ticket/ parking pass ownership with around half (49%) of those who owned a ticket or pass taking part in dog walking compared to 16% of other visitors.

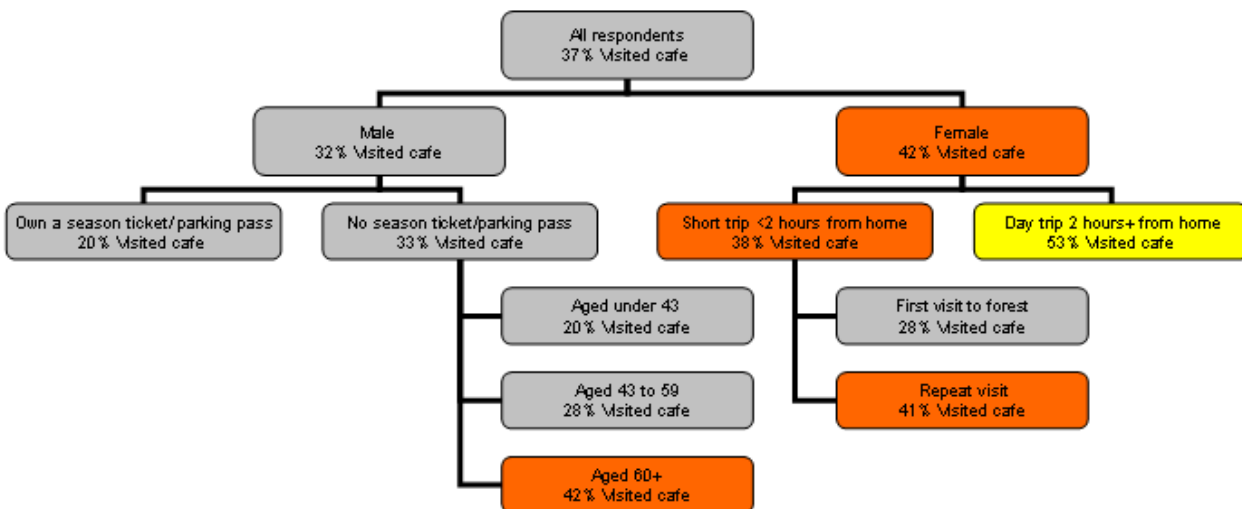
Overall the segment most likely to participate in dog walking were women with a season ticket or parking pass, 65% of whom took part in dog walking.



Activities undertaken – Visiting the café/ restaurant

As illustrated below, while 37% of all respondents visited the café during their visit to the forest, this proportion was higher amongst women than men (42% and 32% respectively).

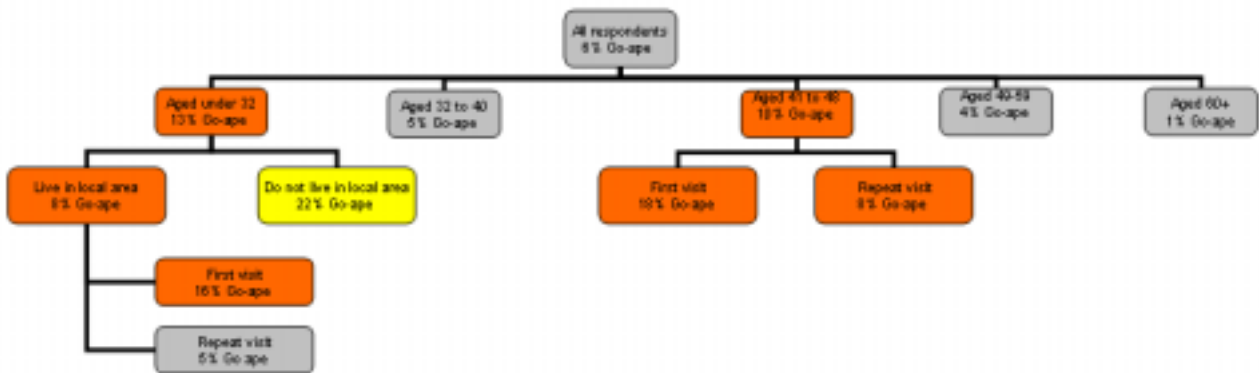
Overall, the segment most likely to visit the cafe was composed of women on a day trip of over 2 hours from home (53%).



Activities undertaken – Go-ape

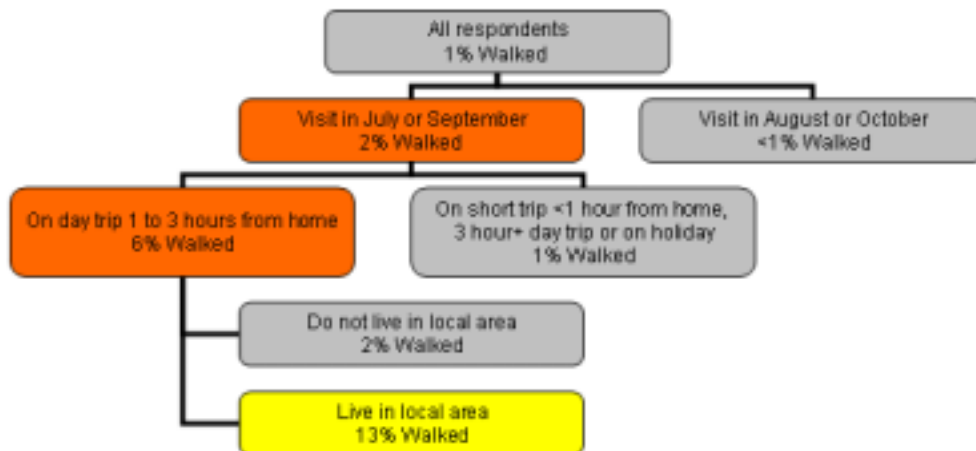
While 6% of all respondents had taken part in Go-ape, participation in this activity varied most by age with 13% of those aged under 32 taking part. Conversely, participation in this activity was lowest amongst those aged 49 or over.

Overall, the segment most likely to take part in this activity was composed of visitors aged under 32 who did not live locally (22%).



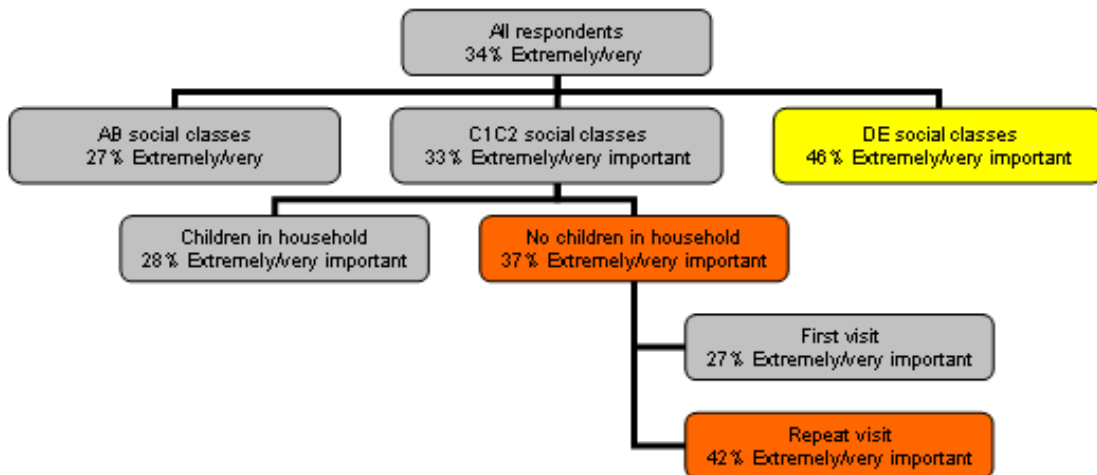
Transport to site – walked

Overall, 1% of all visitors stated that they walked to the site (caution, small sample size). However this proportion was somewhat higher amongst visitors during July and September who lived locally and were on a day trip of between 1 and 3 hours duration (13%).



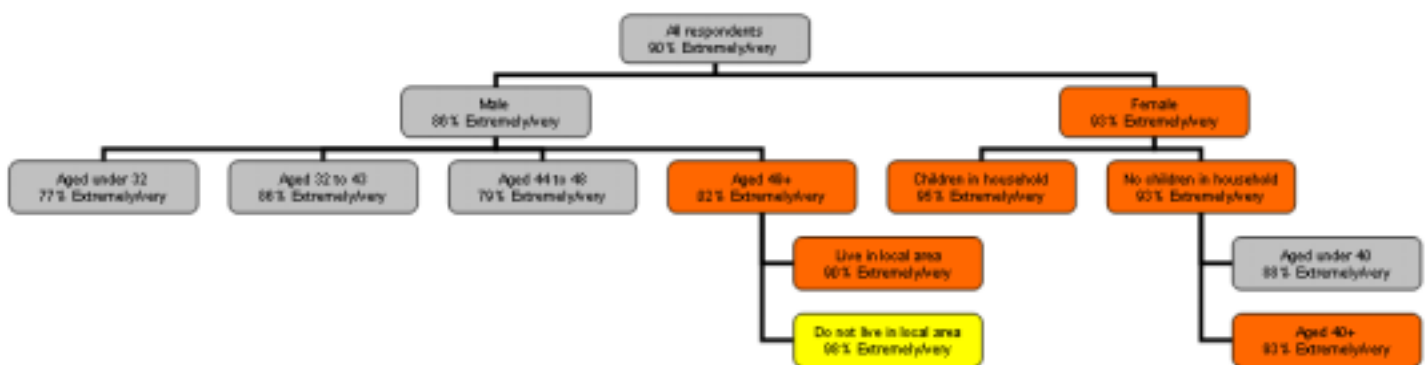
Importance of shop

Across the total survey sample, 34% of respondents stated that the shop was either extremely or very important in their decision to visit the forest. However, the importance of the shop varied most across the different socio-economic groups with those in the DE classes most likely to state that this facility was extremely or very important (46%). Amongst C1s and C2s, those who did not have children in their household who were on a repeat visit to the site were also likely to state that the shop was extremely or very important (42%).



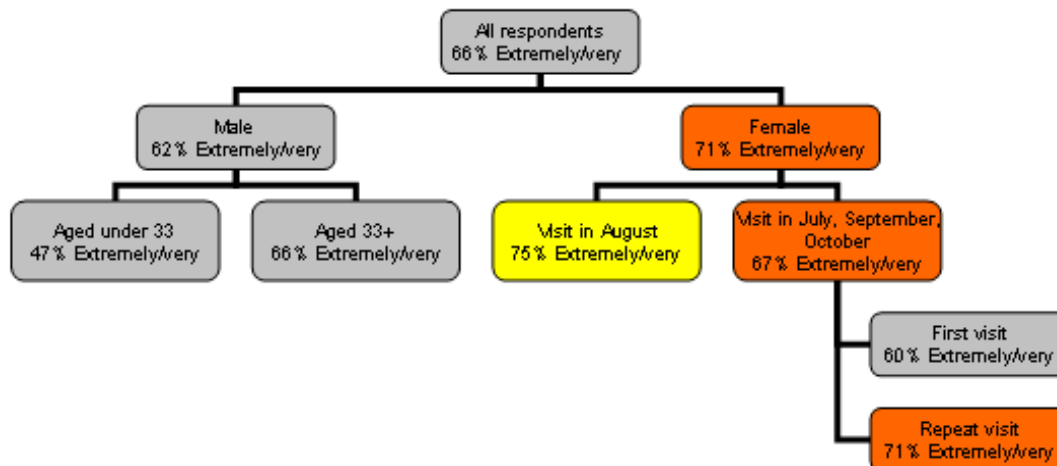
Importance of clean toilets

Across all respondents, 90% stated that clean toilets were either extremely or very important in their decision to visit the forest. The importance of clean toilets varied most significantly by sex with 93% of women rating them as extremely or very important compared to 86% of men. However, as the chart below illustrates the segment of visitors most likely to rate clean toilets at this level were men aged 40 or over who did not live locally (98%).



Importance of paths for walking

Across the total sample paths for walking were extremely or very important to 66% of respondents. However this proportion varied most significantly by sex with 71% of females and 62% of males providing this level of rating. Overall, the largest proportion of respondents stating that paths for walking were extremely or very important were females who visited in August (75%).



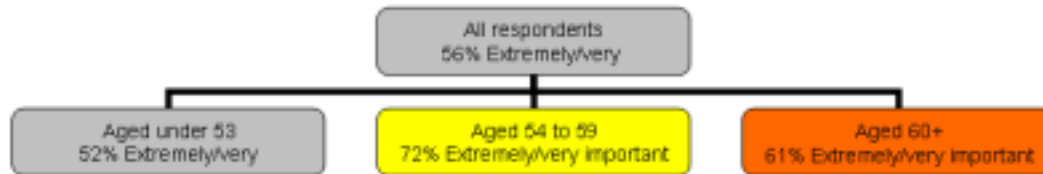
Importance of trails for cycling

Just under half of all respondents rated trails for cycling as extremely or very important. However, as illustrated below, the importance of this factor varied by age and sex with men aged under 36 most likely to provide a rating of extremely or very important (65%).



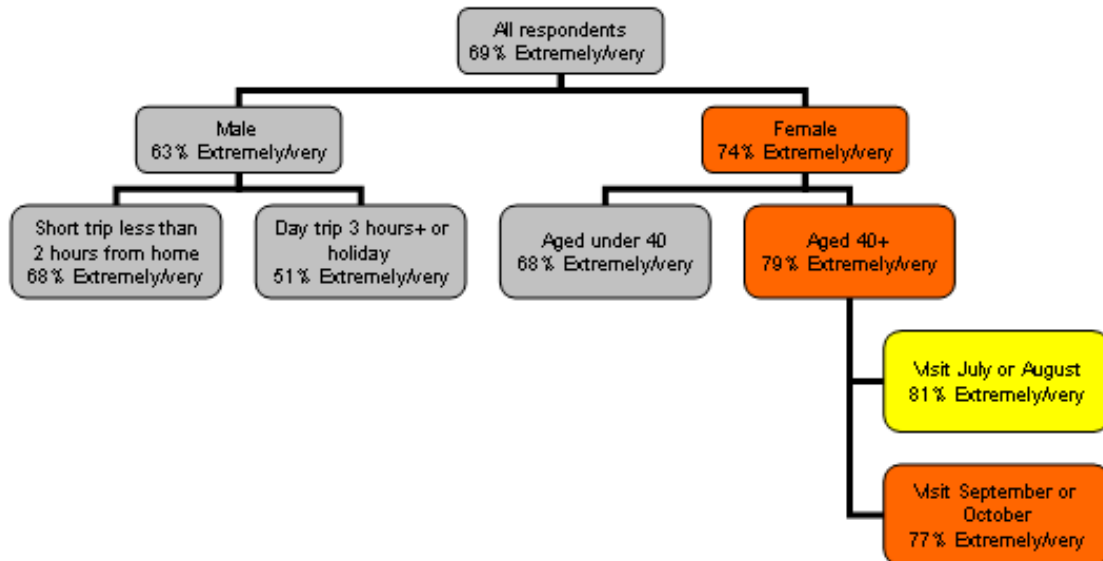
Importance of café

As the chart below, the importance ratings provided for the café facilities varied by age only with visitors aged between 54 and 59 most likely to provide an extremely or very important rating (72%).



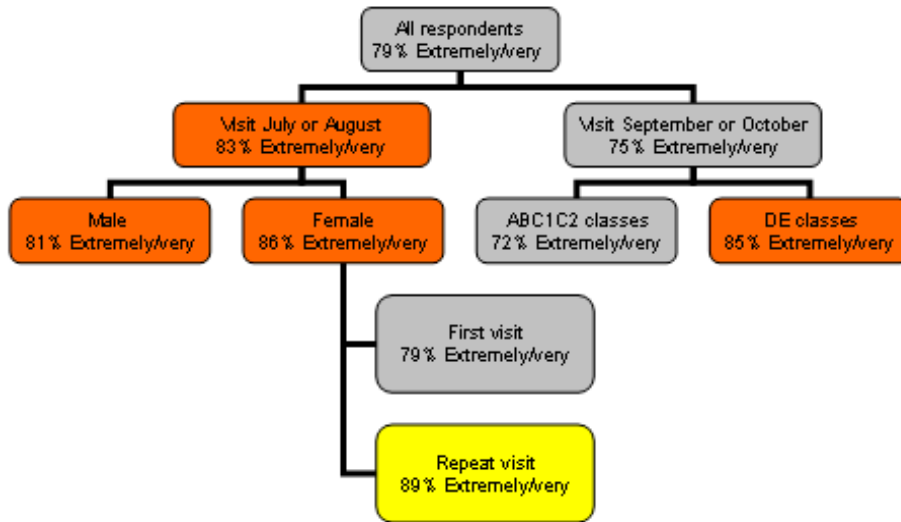
Importance of dog waste bins

While 69% of all respondents stated that dog waste bins were extremely or very important, the proportion was higher amongst women (74%), especially those aged 40 or over who visited in July or August (81%).



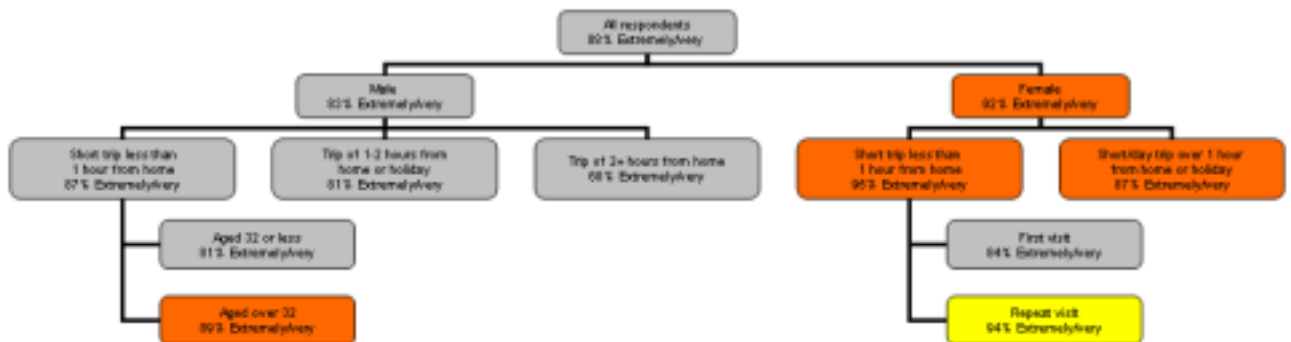
Importance of litter bins

While 79% of all respondents stated that litter bins were extremely or very important, this proportion rose to 83% in July and August. During these months litter bins were on most importance to females on a repeat visit to the site (89% extremely or very important).



Importance of feeling safe in the forest

As the chart below illustrates, while feeling safe in the forest was extremely or very important to 88% of all respondents, females were more likely than males to provide this responses (92% and 83% respectively). Females on a short trip of under an hour on a repeat visit to the site (94%) were the most likely to state that feeling safe was extremely or very important.



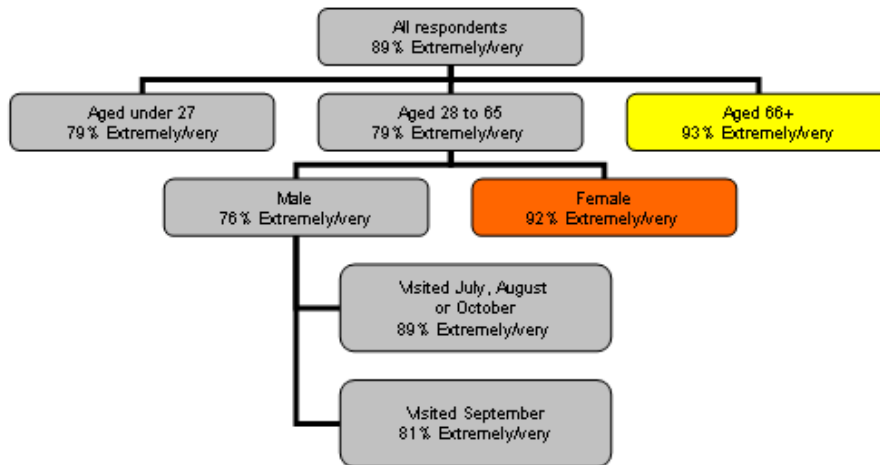
Importance of spending time with family and friends

As the chart below illustrates, the importance of spending time with family and friends was related to whether visitors had children. Some 99% of females who had children in their household and were on a short trip of under 1 hour from home indicated that spending time with family was extremely or very important.



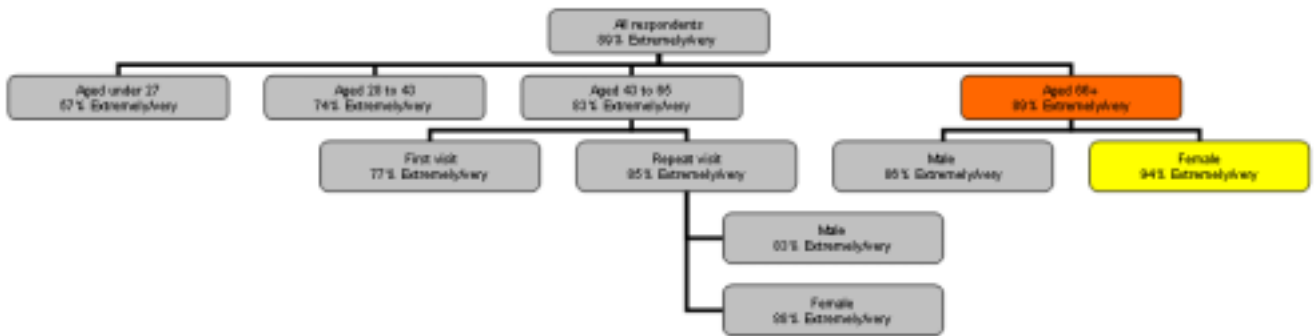
Importance of scenery and views

The importance of scenery and views was rated most highly by visitors aged 66 or over (very or extremely important to 93%) and females aged between 28 and 65 (92%).



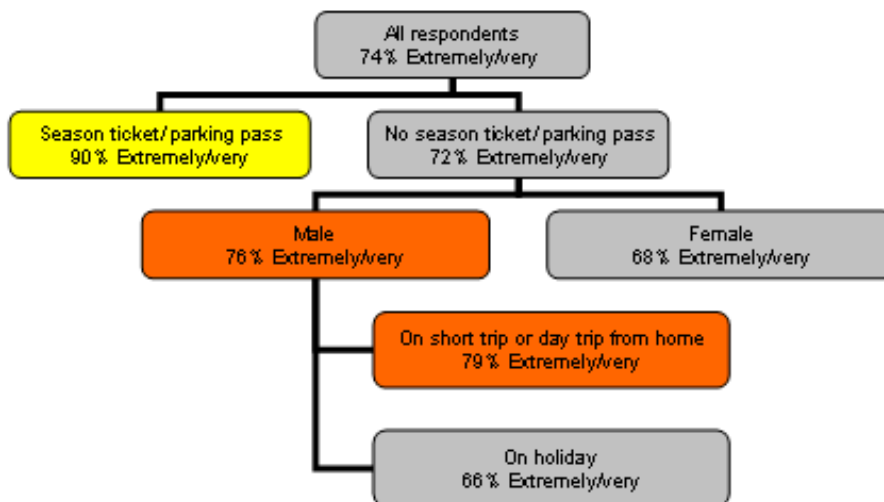
Importance of wildlife

Similarly to scenery and views, the importance of wildlife also varied by age with older visitors more likely to rate this aspect as important. The group most likely to rate this aspect as extremely or very important were females aged 66 or over (94%).



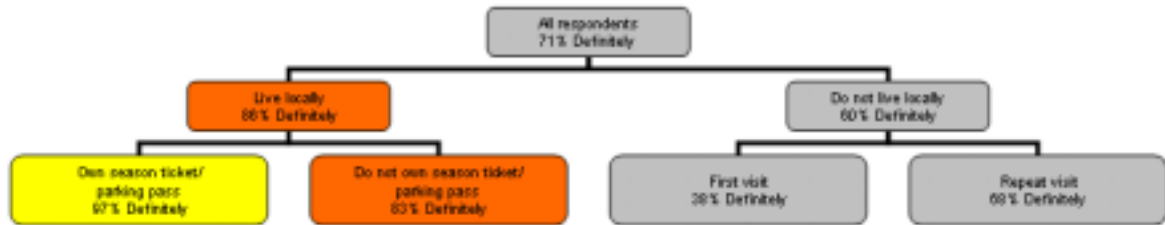
Importance of getting fit and healthy

While getting fit and healthy was extremely or very important to 74% of all respondents, it was of more importance to those who owned a season ticket or parking pass (90%). Amongst those who did not own a season ticket or parking pass, males were more likely to rate this aspect as important, especially those on a short trip or day trip (79% extremely or very important).



Likelihood of revisiting

Overall some 71% of respondents indicate that they would definitely revisit the forest. This proportion was higher amongst those who lived in the local area (86%), particularly those who owned a season ticket or parking pass (97% would definitely revisit).



Likelihood of recommending

The proportion of respondents stating that they would definitely recommend the forest as a place to visit to friends or relatives was highest amongst those on a repeat visit, especially those on a trip of over 2 hours from home (100%).

