

**Monitoring the quality of experience in community
forests in North & Mid Wales
– Bala and Llanidloes area**

Final report

January 2008



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- Bala and Llanidloes area**

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Forestry Commission
January 2008

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A. Background and introduction

Background

This report contains the results of a series of resident surveys which were undertaken in the Bala and Llanidloes areas during November and December 2007. In-home interviews were undertaken with representative samples of the adult population (aged 16 or over) in the vicinity of two Forestry Commission Wales (FCW) forests in the Bala area and the villages surrounding Coed Sarnau, Llanidloes. Maps of the locations of these areas and catchment areas within which surveying took place are appended.

The objectives of this study were to find out about the recreational activities undertaken by members of these communities, levels of recreational use and awareness of local open spaces, motivations for and barriers to using FCW sites for recreation and to identify improvements which could be made.

Method

The survey involved 310 respondents being interviewed at home with the sample divided between the two locations as follows:

- Bala – 152 interviews.
- Coed Sarnau– 158 interviews.

To assist in the design of the survey sample, a geodemographic analysis was undertaken using the ACORN classification¹, thereby providing a detailed profile of the residents of each of these catchment areas. Section C summarises the outcome of this analysis.

Using the results of the geodemographic analysis, interviewers were allocated specific locations to undertake interviews and sampling quotas were set on the basis of age, sex and working status. As such, the resulting survey sample can be considered to be

¹ ACORN (A Classification of Residential Neighbourhoods) categorises all UK postcodes into various types based upon the results of the 2001 Census and other information such as lifestyle surveys.

representative of the population surrounding each of the forests. Only one person per household (adults aged over 16 years) could be interviewed.

Report

This report provides the results of the surveys of residents undertaken in the Bala and Llanidloes areas in November and December 2007 and the detailed geodemographic analysis mentioned above.

Most of the tables in this report show percentages for all respondents interviewed across the two areas combined and amongst those resident in each of two areas. Also shown for comparison are the responses of the users and non-users of the following local outdoor recreation sites:

Bala	Coed Sarnau
<p>FCW sites: Penllyn Forest (Aberhirnant - FCW) Ganllyn (FCW) Lordship (FCW)</p> <p>Other local sites: Bala Lake Bala Lake Railway Llyn Celyn Dyfi Coed y Brenin Penarran Gwydyr Gogerddan Allt Ddel Coed Maenarthur</p>	<p>FCW site: Coed Sarnau</p> <p>Other local sites: Waun Red Lion Treflyn The Barnes Cwmysgawen Cwm bedw Cwmcynydd</p>

Throughout the report, users of any of the above sites are referred to as ‘outdoor users’ while those who have not visited any have been labelled ‘non-users’. These definitions have been included as they provide a useful distinction between individuals who use local outdoor recreation resources (including those managed by FCW) and those who do not visit these locations. Within the Bala area, there are three FCW forests and respondents qualified as a user if they had visited one or more of these forests.

In addition to the above comparisons, other variations within the total sample have been described in the text – for example variations by age or sex. It is important to bear in mind when interpreting the results, that the sample sizes for some of the groups surveyed are low. Only statistically significant findings have been highlighted in the text. A copy of the questionnaire used has been appended.

B. Main results

Community profile

Age, sex and lifecycle

To gather detailed information on the people living in the vicinity of the woodlands, respondents were asked to provide some information about their sex, age and family situation.

As the table below illustrates, slightly over half of respondents were female across all of the user groups shown, with no significant variations between the groups.

Table B-1 – Age, sex and lifecycle (%)

Base: All respondents (310)

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS
Sex					
Male	42	49	45	46	45
Female	58	51	55	54	55
Age					
16 – 24	9	6	8	6	7
25 – 34	11	9	10	10	10
35 – 44	16	18	19	16	17
45 – 54	18	15	19	14	16
55 – 64	16	20	17	19	18
65+	30	32	27	36	31
Lifecycle					
Young Independents (16-34, no children)	9	5	8	6	7
Older Independents (34-54, no children)	18	11	19	10	15
Families (children in household)	28	32	30	30	30
Empty Nesters (55 or over, no children)	44	51	43	53	48
<i>Base (Total respondents)</i>	152	158	165	145	310

In terms of age profiles, while there were no statistically significant variations between the Bala and Coed Sarnau areas, the profile of those who were classified as outdoor users varied from non-users. A higher proportion of non-users (36%) were aged 65 and over than outdoor users (17% respectively).

When analysed by lifecycle, those classified as outdoor users were more likely to be in the Older Independent lifecycle than those classed as non-users (19% and 10% respectively).

Owning a dog

Three in ten residents of the Bala area indicated that they owned a dog (30%), a smaller proportion than amongst those resident in the area surrounding Coed Sarnau (43%). By comparison, a recent survey of all adult residents of Wales² indicated that 34% of the population had a dog.

Across both the Bala and Coed Sarnau areas, the proportion of residents with a dog was highest amongst those in the Family lifecycle (45%).

Access to a car or other vehicle

Four in five respondents in the Bala area stated that they owned or had access to a car or other vehicle (80%) compared to 86% in the area surrounding Coed Sarnau. By comparison, 78% of the Welsh population have regular access to a car³.

The proportions of respondents with access to a vehicle varied by socio-economic group with those in the DE groupings least likely to have access (64%) compared to those in the AB (92%), C1 (97%) and C2 (94%) socio-economic groupings.

Respondents who had visited any of the local outdoor recreation sites were more likely to have access to a vehicle than those who were non-users (85% and 80% respectively), as were those in the Family lifecycle compared to those in the Empty Nester lifecycle (90% v 78%).

² A recreation survey for Wales pilot, undertaken by TNS for FCW and CCW, 2006

³ A recreation survey for Wales pilot, undertaken by TNS for FCW and CCW, 2006

Socio-economic group and employment

In terms of socio-economic groupings, as the table below illustrates, the largest proportion of respondents in both areas were classified as being in the DE socio-economic groups which comprises of semi and unskilled manual workers, state pensioners and the unemployed. Compared to the UK population as a whole, residents of these areas were less likely to be in the AB (higher/intermediate managerial, administrative or professional) and C1 social grades (supervisory or clerical/ junior managerial/ professional) but more likely to be in the DE grades.

Table B-2 – Socio-economic group (%)

Base: All respondents (310)

	Bala	Coed Sarnau	Outdoor users	Non- users	UK Population
AB – ‘upper middle grade’ – higher/ intermediate managerial, administrative or professional	13	18	15	16	17
C1 – ‘lower middle grade’ – supervisory or clerical, junior managerial, administrative or professional	21	23	24	20	26
C2 – ‘skilled working grade’ – skilled manual workers	26	25	26	24	25
DE – ‘working grade’ and unemployed – semi and unskilled manual workers, state pensioners, unemployed	40	35	35	40	32
Base (Total respondents)	152	158	165	145	<i>n/a</i>

As Table B-3 overleaf illustrates, slightly over a third of all respondents were in full time employment while a similar sized proportion were retired. The proportions of respondents in most of the various types of employment listed below did not vary significantly between the two areas. However, respondents in Bala were more likely to be in part-time employment than in the Coed Sarnau area (19% v 9%). Reflecting the previous findings regarding age, a higher proportion of non-users than users of outdoor recreation were retired (41% and 28% respectively).

Table B-3 – Working status (%)

Base: All respondents (310)

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS
Full time (30+ hrs per week)	34	38	38	34	36
Part time (<30 hrs per week)	19	9	19	9	14
Unemployed	9	6	8	7	7
Retired	31	37	28	41	34
Housewife/ husband	5	5	4	6	5
In full time education	-	3	-	3	2
<i>Base (Total respondents)</i>	152	158	165	145	310

Ethnicity

All respondents were asked to provide details of their ethnicity. As is shown in the table below, nearly all respondents were white (99%) with over half stating that they were Welsh (59%) while a third were English. As the table below illustrates, the highest proportion of Welsh respondents were interviewed in the Bala area (73%) while more respondents were English in the Coed Sarnau area (46%).

Table B-4 – Ethnicity (%)

Base: All respondents (310)

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS	Census 2001 (All Wales)
White	99	99	99	99	99	98
Welsh	73	46	68	50	59	
English	20	46	24	43	33	
Other British	3	6	4	4	4	2
White British						96
Other white	3	1	3	2	3	1
Asian	-	-	-	-	-	*
Black	1	-	1	-	*	*
African	1	-	1	-	*	
<i>Base (Total respondents)</i>	152	158	165	145	310	

* Less than 0.5%

- No responses

Disabilities

Around one in ten respondents in the Bala and Coed Sarnau areas stated that they were disabled (9% and 10% respectively). Across the two locations, respondents in the DE socio-economic grouping were more likely than the average to state that this was the case (23%), as did 33% of those who had not used local outdoor recreation sites (sample <50).

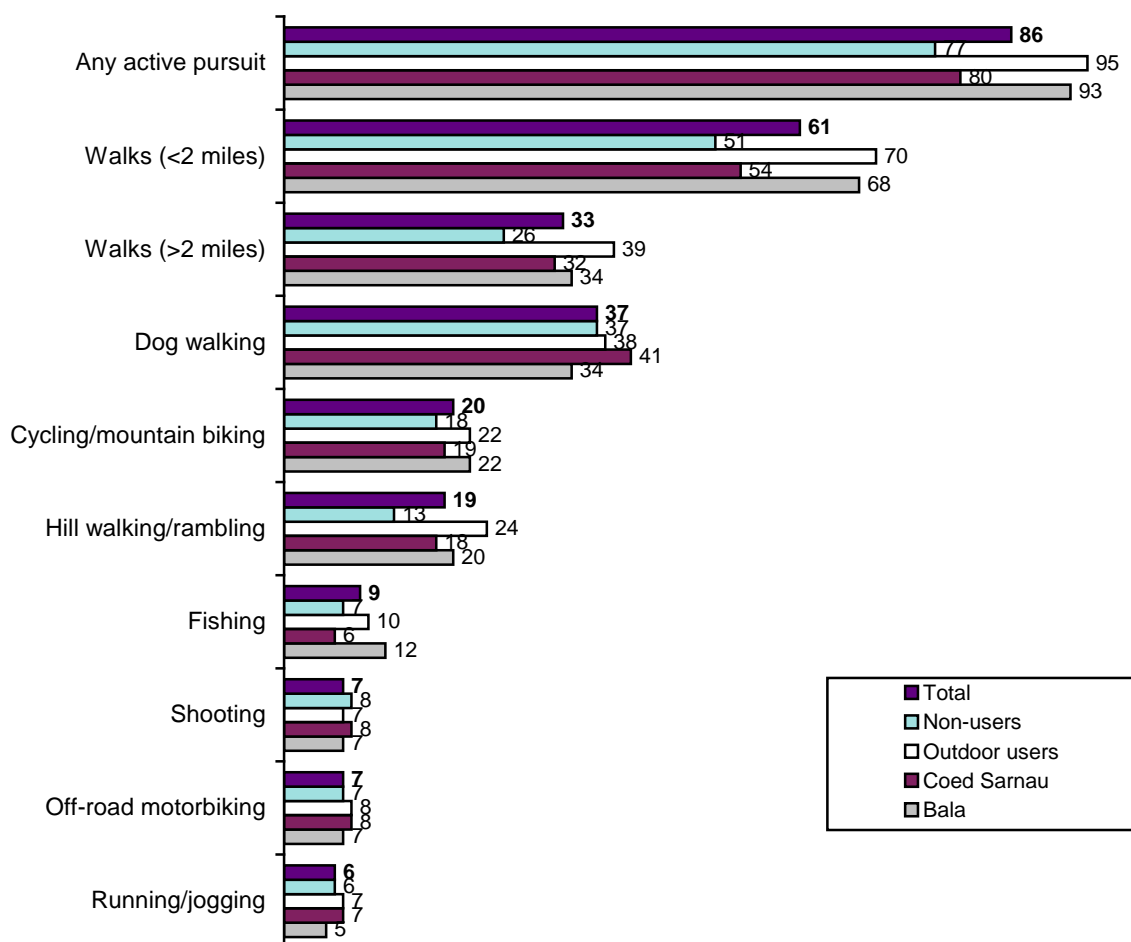
Leisure participation

One of the aims of this survey was to find out more about the lifestyles of the residents of Bala and the Llanidloes area. As such, all respondents were asked a series of questions about their participation in outdoor recreation and other indoor and outdoor leisure activities. The results of this question are illustrated in Table B-5 and described over the following pages, with charts for the relevant sections.

Active outdoor pursuits

Figure B-1 Participation in active outdoor pursuits

Base: All respondents (310)



Over four-fifths of all respondents had regularly taken part in an active outdoor pursuit during the previous 12 months (86%). This proportion was higher in the Bala area (93%) and, across the two sites, highest amongst those aged 45 to 54 (96%). Respondents in the Older Independent and Family lifecycles were more likely than Empty Nesters to state that they had done so (96%, 93% and 78% respectively), while a higher proportion of ABs than DEs stated that this was the case (94% v 80%). Also, 95% of outdoor users had undertaken an active outdoor pursuit in the last year, a higher proportion than amongst non-users (77%).

The specific activity undertaken by the highest proportion of respondents was walking for less than 2 miles, undertaken by 61% of the total sample, 68% in Bala and 54% in the Coed Sarnau area. This activity was also more likely to have been undertaken Older Independents (78%), 45-54 year olds (76%) and women (70%).

The second most frequently undertaken activity was dog walking (37%). Levels of participation did not vary significantly between the locations or by socio-economic group, however, those with access to a vehicle were more likely than those without to have taken part in walking a dog (40% and 25% respectively).

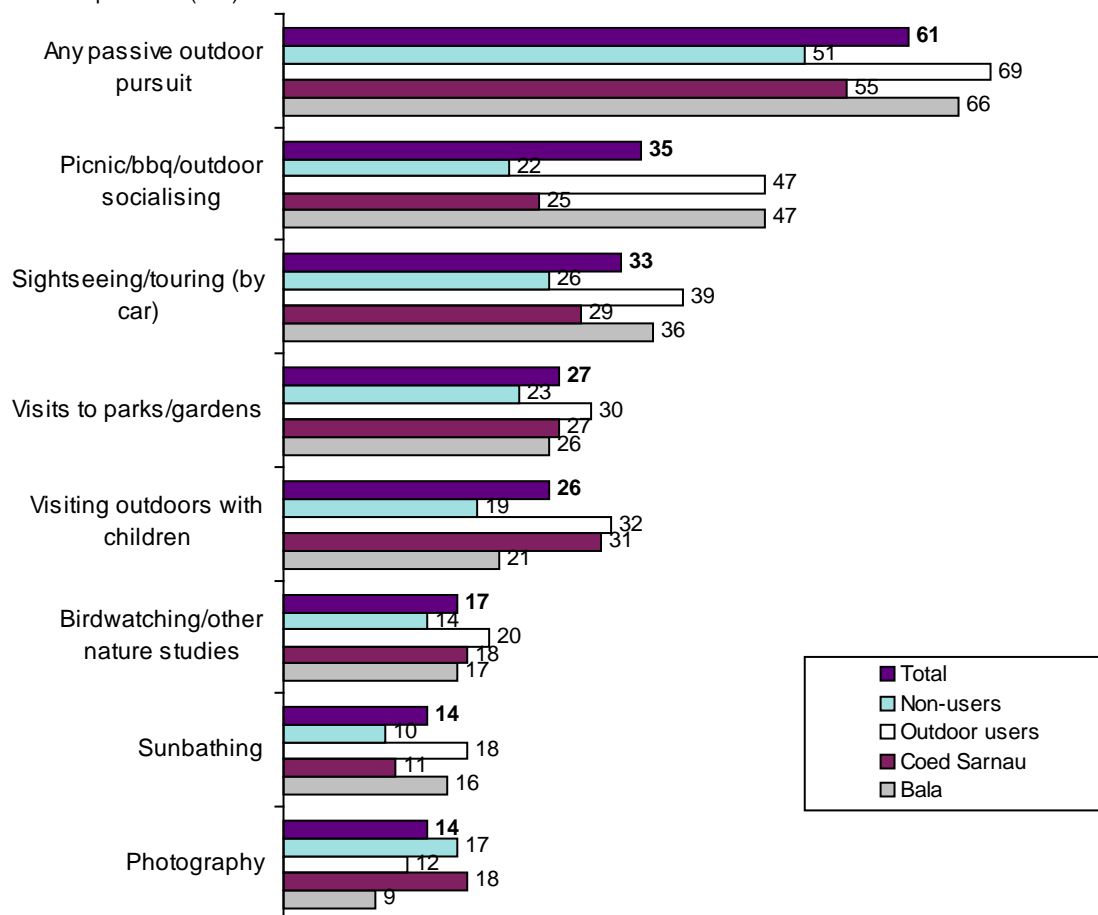
Other variations in active outdoor activity participation levels included higher proportions of men than women participating in cycling/mountainbiking (26% v 16%), running or jogging (10% v 3%) and fishing (16% v 2%). Respondents in the ABC1 socio-economic grouping were more likely than those in the DE social grades to have taken part in hill walking/rambling (28% and 12% respectively), while those in the C1 social grade were more likely to have taken part in fishing than those in the AB and DE social grades (16%, 2% and 6% respectively).

Table B-5 also compares levels of participation amongst respondents who had used local outdoor recreation sites (outdoor users) and those who had not (non-users). As mentioned earlier, those respondents who had visited the outdoor recreation sites listed were also more likely to have taken part in any of the active outdoor pursuits. Most notably users of the local sites were much more likely to undertake some of the most active pursuits including walks of less than 2 miles (70% v 51%), hill walking/rambling (24% v 13%), walks of over 2 miles (24% v 13%), cycling/mountain biking (22% v 18%) and fishing (10% v 7%).

Passive outdoor pursuits

Figure B-2 Participation in passive outdoor pursuits

Base: All respondents (310)



Around six in ten respondents (61%) had undertaken one or more of the passive outdoor pursuits listed. Overall, levels of participation in these types of activity were again higher amongst residents of the Bala area than amongst those living in the vicinity of Coed Sarnau (66% v 55%). Other variations in overall participation in passive outdoor pursuits included lower levels amongst those aged 55 or over (50%), those in the DE socio-economic groups (48%) and those without access to a vehicle (32%).

Across the two areas, the most frequently undertaken passive pursuits were picnics, barbeques and other outdoor socialising (35%), sightseeing by car (33%), visits to parks/gardens (27%) and visits to the outdoors with children (26%). Variations in participation in these activities included higher proportions of females taking part in visits to the outdoors

with children (46%) and picnics and barbeques (53%), with those aged 35-44 also more likely than the average to have taken part in a picnic or barbeque (61%).

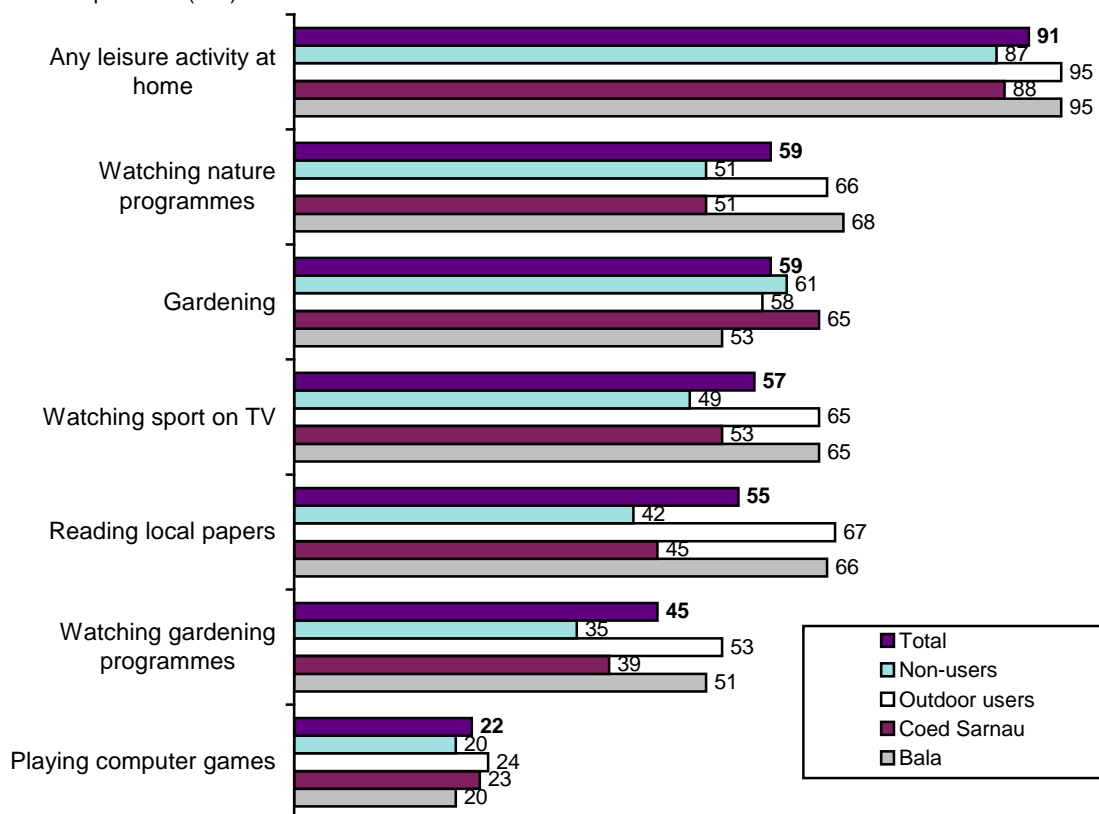
Residents of the Bala area were more likely than those in the Coed Sarnau area to have taken a visit to the outdoors with children (31% v 21%) but were less likely to have taken part in photography (9% v 18%).

Respondents who had visited local outdoor recreation sites were significantly more likely than the non-users to have participated in any of the passive outdoor pursuits listed (69% and 51% overall). Most notably, users of the local sites were much more likely to have been on a picnic or to a barbeque (47% v 22%) and/or to have visited the outdoors with children (32% v 19%). Non-users were more likely than outdoor users to have taken part in outdoor photography (17% and 12% respectively).

Leisure activities at home

Figure B-3 Participation in leisure activities at home

Base: All respondents (310)



The vast majority of all respondents had taken part in at least one of the leisure activities which could be undertaken at home (91%), with respondents in the Bala area again most likely to state that they had done so (95% v 88% at Coed Sarnau). The specific, in-home activities undertaken by the largest proportions of respondents in all of the areas were watching nature programmes on television (59% overall), gardening (59%) and watching sport on television (57%).

Variations between the two areas in participation levels included higher participation in watching programmes about nature and/or gardening in the Bala area (68% and 51%), while residents of the Coed Sarnau area were more likely to have taken part in gardening (65% v 53%).

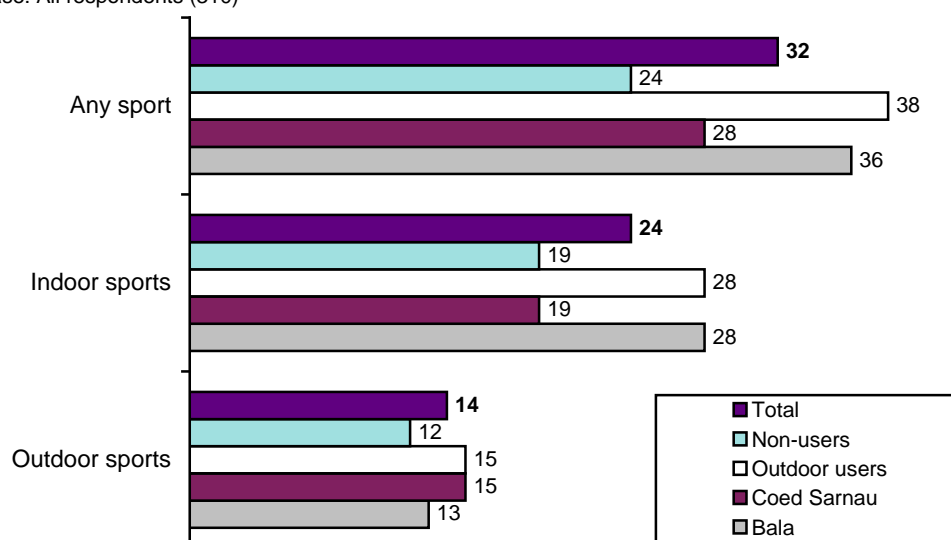
Variations by demographic characteristics included a higher proportion of 45-54 year olds watching programmes about nature (75%) and a higher proportion of those in the Family lifecycle playing computer games (43%).

As with the other groupings of activities, respondents who had visited local outdoor recreation sites were more likely than non-users to have undertaken a number of the activities listed including watching television programmes about sport, nature and/or gardening and reading local papers and gardening. However, there was no statistically significant variation in the proportions taking part in gardening.

Sport

Figure B-4 Participation in sport

Base: All respondents (310)



Overall, just under a third of respondents had regularly taken part in either an indoor or outdoor sport during the previous year (32%). This proportion did not vary significantly between the three locations but was somewhat higher amongst those aged 16 to 34 (52%) and the Family lifecycle group (50%). Members of the AB, C1 and C2 socio-economic groups were also more likely to have taken part in sport than DEs (35%, 44%, 37% and 19% respectively). Conversely, the respondents aged 55 or over (18%) were less likely than the average to have regularly taken part in sport during the previous year.

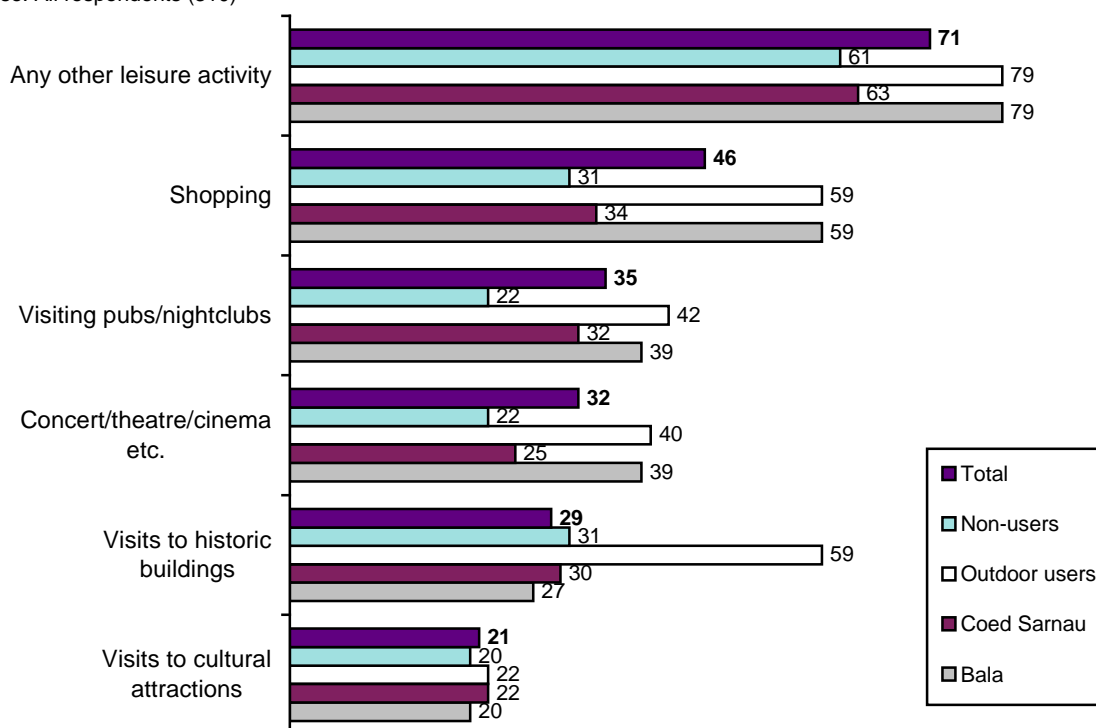
Indoor sports were undertaken by 24% of respondents while 14% undertook sport outdoors. Notably, men were more likely than women to have undertaken an outdoor sport (21% and 7% respectively).

As with most of the activity types listed in Table B-5, respondents who had visited one or more of the local outdoor recreation sites were more likely than those who had not visited any of the sites to have undertaken some form of sporting activity, particularly indoor sports.

Other leisure activities

Figure B-5 Participation in other leisure activities

Base: All respondents (310)



Around seven in ten respondents had taken part in one or more of the other leisure activities listed (71%) with similar proportions recorded in each of the areas surveyed.

In terms of the specific activities listed, most respondents had regularly taken part in shopping for leisure during the last year (46%) while around a third had visited pubs or nightclubs (35%) and/or gone to the cinema, a concert, theatre or a similar cultural activity (32%). Comparing participation levels in the two areas, a higher proportion of residents of the Bala area had taken part in shopping for leisure (59%) and/or going to the cinema, a concert, theatre or a similar cultural activity (39%) than amongst those in the Coed Sarnau area (34% and 25% respectively).

Variations by demographic groups included higher proportions of women taking part in leisure shopping (53%) while men were more likely to visit pubs or nightclubs (42%). In

terms of age, those aged 16 to 34 were more likely than older respondents to go to the cinema or other cultural events (67%) or to go to a pub or nightclub (62%). Also, members of the ABC1 socio-economic groups were more likely than C1s, C2s or DEs to have regularly visited historic sites (41%) or to have gone to the cinema or another cultural event (42%).

As Table B-5 illustrates, respondents who had visited a local outdoor recreation site were also more likely to regularly undertake any of the activities listed. Most notably they were more likely to have visited a historic building and five times as likely to have attended a cultural event and/or to have visited pubs and nightclubs.

Table B-5 – Leisure activities undertaken regularly during last 12 months (%)

Base: All respondents (310) Note: Excludes activities undertaken by less than 5% of all respondents

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS
Active outdoor pursuits	93	80	95	77	86
Walks of 2 miles or less	68	54	70	51	61
Dog walking	34	41	38	37	37
Walks >2 miles	34	32	39	26	33
Cycling/mountain biking	22	19	22	18	20
Hill walking/rambling	20	18	24	13	19
Fishing	12	6	10	7	9
Off-road motorbiking	7	8	8	7	7
Shooting	7	8	7	8	7
Running/jogging	5	7	7	6	6
Passive outdoor pursuits	66	55	69	51	61
Picnics/barbeques/outdoor socialising	47	25	47	22	35
Sightseeing/touring (by car)	36	29	39	26	33
Visits to parks/gardens	26	27	30	23	27
Visiting outdoors with children	21	31	32	19	26
Birdwatching/ other nature	17	18	20	14	17
Sunbathing	16	11	18	10	14
Photography	9	18	12	17	14
Leisure activities at home	95	88	95	87	91
Watching nature programmes	68	51	66	51	59
Gardening	53	65	58	61	59
Watching sport on television	65	53	65	49	57
Reading local papers	66	45	67	42	55
Watching gardening programmes	51	39	53	35	45
Playing computer games	20	23	24	20	22
Sport	36	28	38	24	32
Indoor sports	28	19	28	19	24
Outdoor sports	13	15	15	12	14
Other leisure activities	79	63	79	61	71
Shopping	59	34	59	31	46
Visit pubs/nightclubs	39	32	42	22	35
Concert/theatre/cinema etc	39	25	40	22	32
Visits to historic buildings	27	30	59	31	29
Visits to cultural attractions	20	22	22	20	21
<i>Base (Total respondents)</i>	152	158	165	145	310

Location of outdoor activities

Those respondents who had said that they had taken part in either active or passive outdoor leisure activities during the previous year were also asked to state the nature of the place(s) where they had undertaken these activities.

Table B-6 – Places undertaken outdoor recreation during last 12 months (%)

Base: All respondents undertaking outdoor activities (279)

	Bala	Coed Sarnau	All respondents
The countryside	57	76	67
At home	74	46	60
By a stretch of inland water	72	28	51
Town/city	40	36	38
In a wood or forest	39	36	37
The seaside	37	22	30
<i>Base (Total respondents)</i>	141	138	279

Multiple responses could be provided so percentages total over 100%.

Over half of respondents who had taken part in either active or passive outdoor pursuits had undertaken these pursuits in the countryside (67%), at home (60%) by a stretch of inland water (51%). However, these proportions vary between the two areas with residents of the Bala area more likely to have undertaken an outdoor activity at home (74%), by a stretch of inland water (72%), while residents of the Coed Sarnau area were more likely to have visited the countryside (76%).

Other variations in the types of place visited to undertake outdoor activities included those with access to a car being more likely than those without to visit the countryside (71% v 43%), a wood or forest (40% v 21%) and/or the seaside (34% v 7%). A higher proportion of males than females visited the countryside (73% v 61%), while respondents in the C1 socio-economic grouping were more likely than the average to visit a wood or forest (54%).

Awareness and use of local outdoor recreation sites

At the beginning of the interview, respondents in each area were shown a list of local outdoor recreation sites, including sites managed by FCW, and asked to indicate which they were aware of and which they have visited in the last 12 months. The tables below illustrate the proportions of local residents who were aware of each of the sites and the proportions who had visited each.

Bala

Table B-7– Awareness and usage of local sites – Bala (%)

Base: All respondents in Bala area (152)

	Aware of	Visited
Bala Lake	99	89
Llyn Celyn	87	57
Bala Lake Railway	97	41
Coed y Brenin	85	35
Any FCW Bala	74	21
- <i>Penllyn Forest (Aberhirnant)</i>	49	11
- <i>Ganllyn</i>	60	14
- <i>Lordship</i>	21	5
Gwydyr	43	7
Dyfi	43	6
Penarran	24	1
Coed Maenarthur	11	1
Gogerddan Allt Ddel	11	-
At least one site	99	91
<i>Base (Total respondents)</i>	152	152

- No responses

The vast majority of respondents in the Bala area were aware of one or more of the sites listed in the above table, while around nine in ten had visited one or more in the previous 12 months (91%). Awareness of Bala Lake, Bala Lake Railway, Llyn Celyn and Coed y Brenin were highest (99%, 97%, 87% and 85% respectively). Approximately three-quarters of respondents had heard of one of the FCW sites in the Bala area (74%), with awareness of Ganllyn highest (60%), followed by Penllyn Forest (49%) and Lordship (21%).

In terms of visits to the same list of sites, smaller proportions had been to any of the locations in the past year. The most visited sites were Bala Lake (89%), Llyn Celyn (57%) and the Bala Lake Railway (41%). Around a fifth stated that they had visited one of the FCW sites in the Bala area in the previous year, with 14% of respondents having visited

Ganlllyn, 11% Penllyn Forest and 5% Lordship. Although awareness of Ganlllyn was highest, the site recorded the biggest difference between awareness and usage of local sites.

Llanidloes/Coed Sarnau area

Table B-8 – Awareness and usage of local sites – Coed Sarnau (%)

Base: All respondents (158)

	Aware of	Visited
Red Lion	49	10
Cwm bedw	29	9
Coed Sarnau	31	4
Cwmysgawen	17	4
Cwmcynydd	16	4
Waun	20	3
The Barnes	13	2
Treflyn	14	1
At least one site	77	17
<i>Base (Total respondents)</i>	152	158

- No responses

Just over three-quarters of respondents in the Coed Sarnau area were aware of at least one of the sites listed above (77%), a much higher proportion than had visited one or more during the previous year (17%). Awareness was highest for Red Lion (49%), Coed Sarnau (31%) and Cwm bedw (29%). The smallest proportions were aware of Treflyn and The Barnes (14% and 13% respectively).

Smaller proportions had been to any of the locations in the past year with the highest proportions having visited Red Lion (10%) and/or Cwm bedw (9%). Equal proportions of respondents had visited Cwmysgawen and/or Cwmcynydd (4% each). 4% of respondents had visited Coed Sarnau – 13% of those who were aware of the site.

Other places visited

In each of the areas, those respondents who had taken part in outdoor activities during the previous year were asked to specify the names of the local places they had visited most often to take part in these activities. This question was asked without any prompting (i.e. no list of places was provided to for respondents to choose from).

The most frequently provided answers in each area were as follows:

- *Bala* – Bala Lake (72%), Bala (16%), Coed y Brenin (13%), Barmouth (9%), Ilwyncelyn (7%), Lake Vyrnwy (5%) and Dolgellau (3%).
- *Coed Sarnau* – Elan Valley (34%), Llandrindod Wells (13%), Brecon Beacons, Builth Wells, and Radnor Forest (4% each). 22% stated that they participated in the ‘local area’.

Reasons for *not* visiting

Forests and woodland generally

To measure the potential barriers which prevent people from visiting forests and woodlands, respondents who had not visited a FCW site were asked if there was anything which prevented them from visiting forests and woodlands at all or as much as they would have liked to during the last 12 months.

Table B-9 – Reasons for not visiting forests and woodland generally (at all or as much as would like to)

Base: All respondents who have not visited FCW Bala/Coed Sarnau (272)

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS
Too busy working/ studying	15	14	16	13	14
Poor health/ unable to go	14	7	10	10	10
Too old	7	9	6	10	8
Does not feel safe	3	3	4	1	3
Disabled/ blind/ poor eyesight	4	2	2	3	3
No transport	3	4	3	4	3
Weather	1	3	1	3	2
Too far away	2	2	2	2	2
Illness in family	3	1	2	1	2
Not interested	1	2	2	1	1
Difficult with young children/ baby	1	1	2	1	1
No easy access/paths overgrown	-	1	1	1	1
Caring for housebound relative	1	1	-	2	1
Recent bereavement	1	1	1	1	1
No money/ cannot afford to	1	1	1	1	1
Not aware of sites	-	2	-	2	1
Don't know where to go	-	1	-	1	*
Nothing, visit as often as I like	6	5	6	5	6
No particular reasons	41	37	40	37	39
<i>Base (Total respondents)</i>	120	152	127	145	272

As Table B-10 illustrates, 6% of all respondents stated that they visited woodland as often as they wanted to while 39% stated that they had no particular reasons for not visiting. Respondents in the C1 social grade were more likely than those in the AB, C2 and DE socio-economic groupings to state that they went as often as they wanted to (16% v 2%, 4% and 2% respectively), with men more likely than women to give this answer (9% v 3%).

The most frequently provided reason for not visiting forests related to being too busy working or studying. This was given by 14% of the total sample, with higher proportions of those in the C2 social grade (28%) providing this reason.

Poor health was the second most frequently provided reason for not visiting forests with respondents in the Bala area more likely than in the area surrounding Coed Sarnau to state this (14% v 7%). 18% of respondents in the DE socio-economic grouping cited poor health as a reason for not visiting.

As may be expected, more mentions of age were made by those over the age of 55 (16%) and those in the Empty Nester lifecycle (17%). Also, women were more likely than men to state that woodland did not feel safe to visit (5% v 0%).

FCW Forests in Bala and Coed Sarnau areas

When asked, more specifically, for their reasons for not visiting their local FCW site, the reasons provided were as detailed below.

Table B-10 – Reasons for not visiting local FCW forest sites (at all or as much as would like to)

Base: All respondents who have not visited FCW Bala/Coed Sarnau (272)

	Bala	Coed Sarnau	ALL RESPONDENTS
Not aware of site	18	35	27
Don't know where to go	12	5	8
Too busy working/ studying	9	7	8
Poor health/ unable to go	12	2	6
Too old	5	5	5
Too far away	4	1	3
Disabled/ blind/ poor eyesight	4	1	2
Not interested	1	1	1
No transport	2	1	1
Illness in family	3	-	1
No money/unable to afford it	1	1	1
Does not feel safe	1	-	*
Nothing, visit as often as I like	-	2	1
No particular reasons	41	26	32
<i>Base (Total respondents)</i>	120	152	272

The most frequently provided response overall related to a lack of awareness of the FCW sites (27%), more so at Coed Sarnau than at Bala (35% and 18% respectively). Overall, a general lack of awareness of where to go (8%), being too busy working or studying (8%) and poor health (6%) were the next most frequently provided reasons.

Comparing the reasons provided in each area, other variations included a higher proportion of respondents in the Bala area indicating that poor health, illness within the family and a general lack of awareness of forestry in their area were reasons for not visiting these locations more often.

Only one respondent (in the Bala area) stated that they did not feel safe to visit the FCW sites in this area but did not specify why.

When asked to provide more details on why they had not visited some of the reasons provided included the following:

Bala

“Can't drive and I don't go out unless family take me out.”

“Full of visitors, daytrippers and litter.”

“Lack of promotion.”

“Other places/woodland closer to home.”

Coed Sarnau

“We do not go into the woods.”

“I have never heard of it.”

“Heard of it but not sure where it is.”

“Right up in the hills, very twisty roads.”

Encouraging visits

All respondents were shown a list of possibilities and asked which, if any, might encourage them to visit their local woodland more often. Overall, three in ten respondents (30%) stated that nothing would encourage them to visit as did 38% of those who had not visited any local outdoor recreation sites in the past year (the 'non-users'). Two-fifths of all respondents stated that more information about the site would be useful (40%), while 19% indicated that they would be encouraged to visit if there were more paths with waymarked routes.

Comparing the responses of those who had visited local outdoor recreation sites with non-users, users were more likely than non-users to be encouraged by more paths with waymarked routes (22% and 14% respectively).

Table B-11 – Which of the following might encourage you to visit Bala/Coed Sarnau Forestry?
Base: All respondents (310)

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS
More information about the site	38	42	40	39	40
More paths with waymarked routes	20	18	22	14	19
More ranger led/ guided walks around the sites	7	8	10	5	7
Improved security at the sites	2	5	4	3	4
Nothing	28	33	24	38	30
<i>Base (Total respondents)</i>	152	158	165	145	310

Providing information

The 40% of respondents who indicated that more information would encourage them to visit their local FCW site were asked about how they thought the information should be provided. As the table below illustrates, around half of all respondents suggested the local press (52%) and leaflets (50%) while the other alternatives were less popular.

Table B-12 – Which would be the best way to provide information about local woodland?

Base: All who stated more information might encourage them to visit (123)

	Bala	Coed Sarnau	ALL RESPONDENTS
Local press	53	52	52
Leaflets	54	45	50
Posters on local notice boards	33	24	28
Post	26	21	24
Web-site	19	17	18
Local radio	11	9	10
E-mail	7	8	7
<i>Base (Total respondents)</i>	<i>57*</i>	<i>66*</i>	<i>123</i>

* Note small sample – treat results with caution.

Benefits of FCW forests

All respondents were asked to specify what, in their opinion, were the main benefits of having woodland in their local area. Respondents were asked to select from a list of possible benefits.

Table B-13 – Benefits of having woodland in local area (%)

Base: All respondents (310)

	Bala	Coed Sarnau	Outdoor users	Non-users	ALL RESPONDENTS
Good for wildlife	74	77	77	73	75
Creates a natural environment for future generations to enjoy	61	53	59	53	56
Creates places for other people to take part in outdoor recreation	46	46	51	43	47
Attracts tourists to the area	49	41	50	40	45
Somewhere for birdwatching and other nature studies	47	44	47	43	45
Improves the landscape and look of the area	41	44	43	42	43
Improves the reputation of the area	37	32	36	32	35
Creates areas for my personal use	21	27	24	25	24
None/ can't see any benefits	3	11	2	12	7
<i>Base (Total respondents)</i>	152	158	165	145	310

Across the two areas as a whole, the most frequently selected benefits of having local woodland related to the benefits for wildlife (75%), the creation of a natural environment for future generations to enjoy (56%) and that woods were a natural environment for other people to enjoy (47%). The least selected benefit was that the woods were areas for the respondent's own personal use (24%). Some 7% of all respondents stated that they could not see any benefits to having woods in their local area.

There were no statistically significant variations in the responses provided in each of the two geographic areas, with the exception of the proportions stating that they could not see any benefits (3% Bala, 11% Coed Sarnau). Respondents who visited local recreation sites were less likely than non-users to state that there were no benefits to such woodlands (2% and 12% respectively).

Table B-14 Benefits of sites – all sites surveyed to date (%)

Base: All respondents

	Thames Chase	South Yorkshire	South Wales	NW England	SW England	North & Mid wales	Average
Good for wildlife	76	72	75	74	82	75	76
Creates a natural environment for future generations to enjoy	70	56	68	60	77	56	65
Creates places for other people to take part in outdoor recreation	64	58	62	57	77	47	61
Attracts tourists to the area	n/a	38	43	26	40	45	38
Somewhere for birdwatching and other nature studies	53	39	44	36	56	45	46
Improves the landscape and look of the area	63	63	69	51	70	43	60
Improves the reputation of the area	48	48	52	45	58	35	48
Creates areas for my personal use	49	36	43	44	60	24	43
<i>Year surveyed</i>	<i>2004</i>	<i>2005</i>	<i>2006</i>	<i>2006</i>	<i>2007</i>	<i>2007</i>	
<i>Base (Total respondents)</i>	323	313	503	319	293	310	2,061

Comparing the responses obtained to this question to the responses obtained when the same question was asked in the Thames Chase (Greater London), South Yorkshire, the Newlands Community Forest (Manchester) areas and in South Wales, respondents at the Bala and Coed Sarnau sites surveyed in 2007 (North & Mid Wales) were less likely than the average to mention the benefits listed, particularly that such woodland creates an area for their personal use and that they improve the look and landscape of the area.

Management of FCW forests

All respondents were asked to indicate who they thought managed the local FCW forests (i.e. Penllyn Forest (Aberhirnant), Ganllyn and Lorship in Bala and Coed Sarnau, Llanidloes). Across the three locations as a whole, almost six in ten respondents (59%) stated that they did not know, 30% thought that the Forestry Commission managed the land and 2% thought that the land was managed by the National Park.

Visits to FCW forests

As described previously, respondents were asked to indicate whether they had visited a selection of local outdoor recreation sites within their local area. A different list of locations was shown to respondents in each of the survey areas. In Bala, respondents were asked about Penllyn Forest (Aberhirnant), Ganllyn and Lordship and in the Llanidloes area, about Coed Sarnau.

19% of all respondents had visited their local FCW forest during the previous year, ranging from 21% of those who lived the Bala area (32 respondents) and 4% in the Coed Sarnau area (6 respondents).

These respondents were asked questions about their most recent visit to their local forest and the following sections provide details of these visits. It is important to interpret these results with caution due to the very small sample sizes.

Frequency of visits

Across the two sites as a whole, over half of respondents who had visited local FCW sites during the previous year tended to visit these sites at least once a year (58%, 22 respondents). The average number of visits per visitor, per year was 4, with an average of 4 visits per year to FCW forests near Bala and 3 to Coed Sarnau.

Table B-15 – Frequency of visits to forest (number of respondents)

Base: Respondents who have been to local FC forests (38*)

	Visits to Bala Woods	Visits to Coed Sarnau Woodland	TOTAL
Every day	-	-	-
4 to 6 times per week	-	-	-
1 to 3 times a week	-	-	-
1 to 3 times a month	3	-	3
4 to 6 times a year	5	2	7
1 to 3 times a year	18	4	22
Less often	6	-	6
Average visits per year:	4	3	4
Base (Total respondents)	32*	6*	38*

- No responses

*small sample size

As shown in Table B-16 below, in comparison to other forests included in this programme of research, users of the FCW sites in these areas visited far less often than those who visited local forests in the Thames Chase Community Forest in Greater London (av. 46 visits per year), the South Yorkshire Community Forests sites (av.80 visits per year), those visiting the Newland Community Forest sites in the Manchester area (av. 88 visits per year) and those in South West England (av. 33 visits per year).

Table B-16 Average number of visits to forest (all sites surveyed to date)

Base: Respondents who have been to local FC forests

	Thames Chase	South Yorkshire	South Wales	NW England	SW England	North & Mid Wales	Average
	46	80	76	88	33	4	55
Base	46	62	154	37	208	38	545

Activities undertaken

In terms of the activities undertaken during their most recent visits to FCW forests, as Table B-16 illustrates, the most frequently undertaken activities overall were short walks of under 2 miles (50%, 19 respondents) and walks of more than two miles in length (37%, 14 respondents). Just under a third of all users of the forests had undertaken at least one active pursuit (32%), with birdwatching and nature studies (18%, 7 respondents) and picnics and barbeques (13%, 5 respondents) the most frequently mentioned activities.

Table B-17 – Activities undertaken on most recent visit (number of respondents)

Base: Respondents who have been to local FC forests (38*)

	Visits to Bala Woods	Visits to Coed Sarnau Woodland	TOTAL
Active outdoor pursuits	31	6	37
Walks of under 2 miles	17	2	19
Walks of over 2 miles	12	2	14
Dog walking	7	3	10
Cycling or MTB	3	-	3
Off road motorbiking	2	1	3
Running or jogging	2	-	2
Horse riding	-	1	1
Passive outdoor pursuits	10	2	12
Birdwatching or other nature studies	7	-	7
Picnics, BBQ, etc.	4	1	5
Photography	1	1	1
Sunbathing	1	-	1
<i>Base (Total respondents)</i>	32*	6*	38*

- No responses

*small sample size

Activities undertaken by children

Three in ten respondents had children aged under 16 in their household (30%). As the table below illustrates, amongst these respondents 14% stated that their children had played in the woodland while accompanied by an adult and 14% stated that their children visited during a school trip.

Table B-18 – Activities by children in FCW forests during last 12 months (%)

Base: Respondents with children aged under 16 in household (94*)

	Visits to Bala Woods	Visits to Coed Sarnau Woodland	TOTAL
Playing in woodland accompanied by an adult	12	16	14
Playing in woodland accompanied by older children	2	8	5
Playing in woodland unaccompanied by adults and older children	-	6	3
A school visit to the wood	23	6	14
Not visited	60	78	70
<i>Base (Total respondents)</i>	43*	51*	94*

* small sample size

Those respondents whose children had not visited the local woodland were asked to explain why this was the case. The most frequently provided reasons were as follows:

- Not heard of/ don't know where it is (32 respondents)
- Too busy to take them (5)
- Not interested (4)
- Too far from home (4)
- Too young (4)
- No particular reason (4)
- School not in the area (2)
- Go to other places (2)
- Traffic too busy on roads (1)

Length of visits

As the table below illustrates, the average length of time spent during visits to the three woods was 1 hr and 25 minutes.

Table B-19 – Length of visit (number of respondents)

Base: Respondents who have been to local FC forests (38*)

	Visits to Bala Woods	Visits to Coed Sarnau Woodland	TOTAL
Up to 15 minutes	3	1	4
15 – 30 minutes	4	-	4
30 minutes – 1 hour	7	2	9
1 hour – 2 hours	9	2	11
2 hours – 3 hours	3	1	4
3 hours – 5 hours	4	-	4
More than 5 hours	-	-	-
<i>Average</i>	<i>1 hr 28 min</i>	<i>1 hr 11 mins</i>	<i>1 hr 25 mins</i>
<i>Base (Total respondents)</i>	32*	6*	38*

- No responses

*small sample size

Importance of different aspects of visit

To identify the drivers of quality, those respondents who had used any of the FCW forests covered in this survey were asked to rate how important different aspects were in their decision to visit the site. Users could rate each of a list of aspects as ‘extremely important’ (5), ‘very important’ (4), ‘fairly important’ (3), ‘fairly unimportant’ (2) or ‘not at all important’ (1). Scores were then applied to responses, allowing averages to be obtained across the whole sample - the higher the average score, the more important the aspect is across the sample as a whole.

In the table below an overall ‘average’ of all of the mean scores has been included in the rankings. Any aspect above this level can be considered as being most important to the site across all users while the other aspects may be of less importance overall or only important to certain groups of users. Two columns of figures are shown. The first is the levels of importance of each aspect in decisions to visit the local FCW forests amongst people who have been to these sites. The second column illustrates levels of importance amongst the users of other woods and forests i.e. those who haven’t visited FCW sites.

Table B-20 – Importance of different aspects in decisions to visit woodland (mean score)

Base: Respondents who have been to local FC sites (38*)/ Respondents who been to other woodland but not FC sites (79*)

	Importance in decision to visit FCW sites	Importance in decisions to visit other woods.
<i>Being able to enjoy scenery and views</i>	3.97	4.01
<i>Being able to enjoy the wildlife</i>	3.84	4.09
<i>Feeling safe in the wood</i>	3.76	3.98
<i>Being able to spend time with family and friends</i>	3.71	3.94
<i>Being able to get fit and healthy</i>	3.68	3.84
<i>Convenience to where I live</i>	3.61	3.33
OVERALL AVERAGE ++	3.61	3.59
Solitude, peace and quiet	3.57	3.85
Value for money of your whole trip or day out	3.50	3.54
Provision of all ability trails for prams, pushchairs, wheelchairs etc.+	3.50	3.11
Choice of paths for walking	3.42	3.86
Picnic tables/ seats	3.16	3.23
Choice of trails for other activities+	3.17	3.00
Clear signposting on footpaths+	3.00	3.82
Leaflets and maps to help you find your way around+	3.00	3.43
Availability of staff at the site+	2.83	2.90
Choice of trails for cycling+	2.60	2.90
Information about the site’s history and conservation+	2.33	3.68
Feeling happy to leave your car in the car park	n/a	3.97
Enough car parking	n/a	3.66

*small sample size

N/A = not asked

+ = Coed Sarnau only (6 respondents)

++Based on aspects rated at both sites

The most important aspects in decisions to visit the local FCW forests were ‘being able to enjoy scenery and views’, ‘being able to enjoy the wildlife’, ‘feeling safe in the wood’ and ‘being able to spend time with family and friends’. The least important aspect overall was

‘picnic tables/seats’, while the aspects rated lowest in terms of importance at Coed Sarnau included ‘the availability of staff on site’, ‘the choice of trails for cycling’ and ‘the choice of trails for activities other than walking’.

Comparing the factors most important to visitors to FCW forests with the factors important to people who never visit these sites but go to other woods suggest a similar order of priorities. The top priorities when visiting other woods were being able to enjoy the wildlife (4.09), enjoying the scenery and views (4.01) and personal safety (3.98).

People who had visited the FCW forests during the last year were also asked to specify in their own words what else, if anything, had influenced their decision to visit (38 respondents). The most frequently provided response across both areas was for fresh air or a day out (2 respondents).

Responses specific to visitors to the three sites at Bala included that they were close to home/convenient (6 respondents), to spend time with friends/family (4 respondents), to take part in motor biking (3 respondents), a good/safe place for children (3 respondents) and the weather (2 respondents). Equal numbers of respondents at Coed Sarnau mentioned walking the dog, passing en route, cycling/bike hire, the wildlife and fresh air/a day out as their reasons for visiting (stated by 1 respondent each).

Favourite aspects of woods

When the visitors were asked what they liked most about their local FCW forest, the most frequently provided responses related to 'peace/tranquility' (39%, 15 respondents), 'lovely scenery and views' (16%, 6 respondents) and 'activities/plenty to do' (13%, 5 respondents). Wildlife and convenience/proximity to home were the two most frequently mentioned of the aspects specific to Bala visitors (4 and 3 respondents respectively). Some of the specific answers provided included the following:

Bala

"Scenery like the peace and quiet of the woods."

"Scenery; position overlooking the lake; fishing."

"Quiet scenery and wildlife good see Bala Lake in all its glory."

Coed Sarnau

"Availability to walk the dogs free of hassle."

"The peace and quiet."

Satisfaction with different aspects of visit

Those respondents who had visited the local FCW forests were provided with a list of different elements of each site and asked to rate how satisfied they had been with each during their visit. Respondents could rate each of the elements on a five point scale which included 'excellent' (5), 'very good' (4), 'good' (3), 'fair' (2) and 'poor' (1). Also, if visitors had no experience of a specific element they were asked to indicate that they did not know.

Scores were then applied to responses, allowing averages to be obtained across the whole sample - the higher the average score, the more satisfied visitors were with this aspect. This analysis suggests that, overall, visitors were most likely to be satisfied with the convenience of the woodland, scenery and views, being able to enjoy the wildlife, value for money and feeling safe in the forest.

Table B-21 – Satisfaction with different aspects at forest (mean score)

Base: Respondents who have been to local FC sites (38*)

	Satisfaction score	Base*
<i>Being able to enjoy scenery and views</i>	3.81	37
<i>Being able to enjoy the wildlife</i>	3.81	36
<i>Value for money of your whole trip or day out</i>	3.76	37
<i>Feeling safe in the forest</i>	3.75	36
<i>Being able to spend time with family and friends</i>	3.71	34
<i>Convenience/ close to where I live</i>	3.67	30
<i>Being able to get fit and healthy</i>	3.67	36
OVERALL AVERAGE++	3.67	38
Solitude, peace and quiet	3.61	36
Choice of paths for walking	3.52	33
Picnic tables/ seats	3.37	30
Choice of trails for other activities (e.g. horse riding)+	3.25	4
Clear signposting on footpaths+	3.20	5
Choice of trails for cycling+	3.00	4
Provision of all ability trails for prams, pushchairs, wheelchairs+	3.00	4
Leaflets and maps to help you find your way around+	2.50	4
Information about site's history and conservation+	2.33	3
Availability of staff on site+	1.75	4

*Number of respondents who experienced the aspect /provided a rating
+Rated at Coed Sarnau only

**small sample size
++Based on aspects rated at both sites

An overall 'average' of all of the mean scores has been included in the ranking based on those aspects rated at both sites. Elements ranked lowest on average include picnic tables and seats, the choice of paths for walking and solitude, peace and quiet.

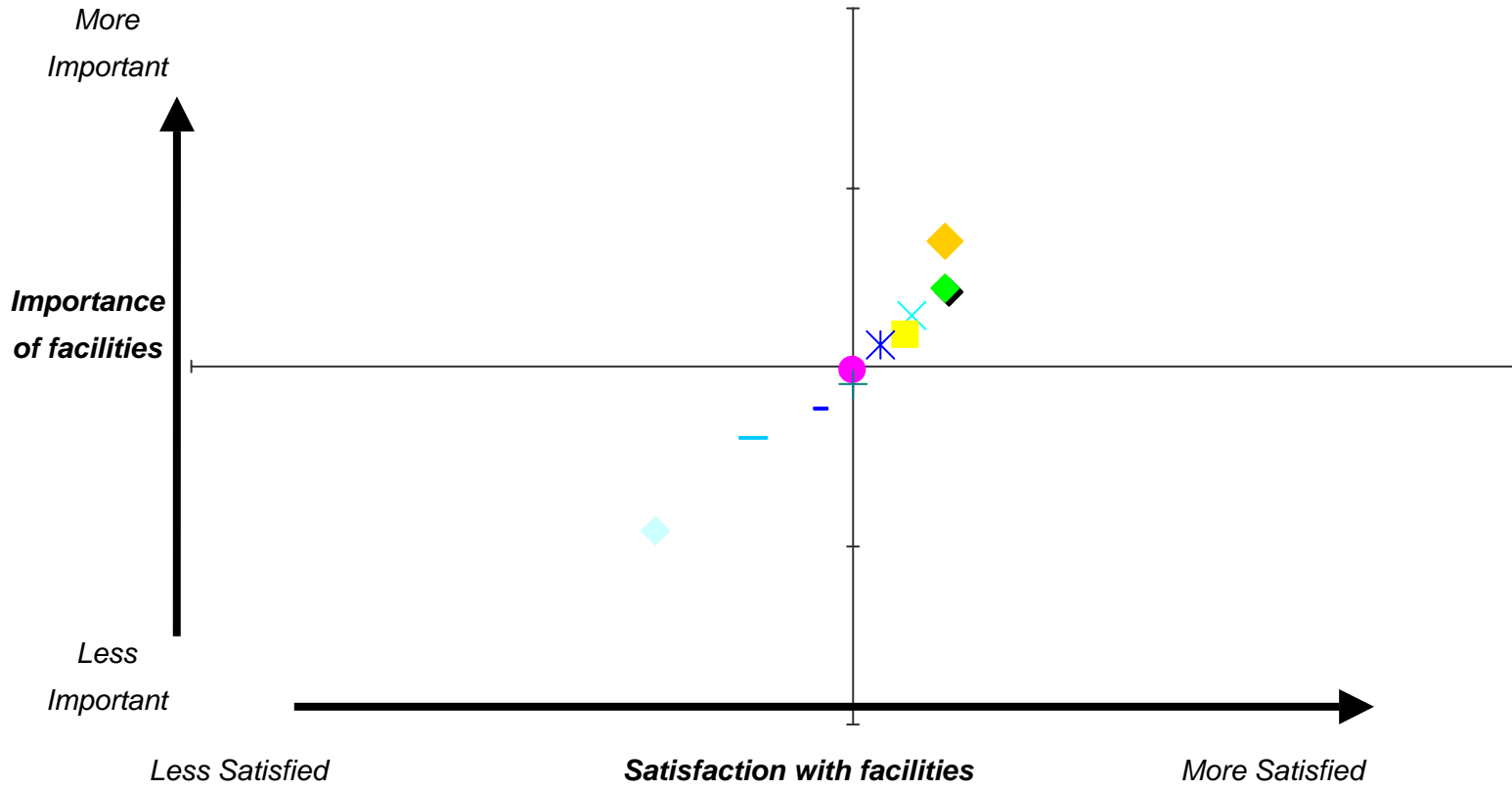
When comparing these scores it is important to bear in mind the small sample and that not all variations are statistically significant. This ranking should therefore be treated as providing an indication of what visitors are most and least satisfied with.

Reasons for dissatisfaction

Respondents who rated any of the aspects listed in Table B-20 as either 'fair' or 'poor' were asked to state why they were not totally satisfied. Some of the key responses provided are detailed below with the number of respondents giving each reason in brackets.

- *Leaflets and maps (Coed Sarnau only)* – not enough (1).
- *Choice of paths for walking* – not enough (2, Bala only).
- *Solitude, peace and quiet* – busy/crowded/lots of activities (1, Bala only).
- *Convenient/close to home* – too far away from where I live (2).
- *Availability of staff (Coed Sarnau only)* - did not see anybody (2).

Analysis of importance of elements of visit V satisfaction with same elements
 Base: Respondents who have been to local FC sites (38)



◆ Being able to enjoy the scenery and views

◆ Being able to enjoy the wildlife

× Value for money of the whole trip

■ Feeling safe in the forest

× Being able to spend time with family/friends

● Convenience/close to home

+ Being able to get fit and healthy

- Solitude, peace and quiet

- Choice of paths for walking

◆ Picnic tables/seats

Identification of issues

Tables B-20 and B-21 illustrated a ranking of the overall levels of importance and levels of satisfaction users have with different aspects of the ‘visitor experience’ at the FCW sites in Bala and the Llanidloes areas. It is useful to combine these two measures to identify the elements which are most relevant to improving quality. Again, it is important to bear in mind, when comparing these scores, that the sample of respondents who had visited these sites was small so this ranking should therefore be treated as providing an indication of the importance of different aspects and what visitors are most and least satisfied with.

The chart on the previous page presents each of the elements that were rated in terms of both importance and satisfaction. The centre point is where the ‘average’ importance crosses the ‘average’ satisfaction score. Each element is plotted in the 4 quadrants as follows:

- Top right – *More Satisfied – More Important* – Scenery/views, being able to see the wildlife, value for money, feeling safe in the forest and being able to spend time with friends and family. These are the site’s key strengths which should be maintained.
- Bottom right – *More Satisfied – Less Important* – None of the elements ranked fell into this quadrant.
- Top left – *Less Satisfied - More Important* – Again, none of the elements ranked fell into this quadrant.
- Bottom left – *Less Satisfied – Less Important* – Solitude, peace and quiet, the choice of paths for walking and picnic tables or seats. Overall, visitors were less satisfied than average with these aspects but they are also seen as less important by most visitors. These elements might therefore be considered as lower priorities for investment.

It is important to note that the scores presented in this chart are averages across *all visitors* during the period in which the survey took place. It should be remembered that the scores for satisfaction and importance varied between different types of locations and visitors so their priorities will also differ.

Other visitors

When asked which other users had been encountered during their recent visits to the FCW forests, just over two-thirds of visitors stated that they had seen walkers (68%) while half had seen children (50%) and slightly less than half had seen cyclists (45%). Smaller proportions had seen motor bikers/moto cross users, horse riders or other vehicles driving in the woodland.

Respondents who had encountered each of the different user groups were asked to indicate how this had impacted on their overall enjoyment. Mean scores were applied to results from +2 if a user group ‘increased enjoyment a lot’ to -2 if they ‘decreased enjoyment a lot’. Again, it is important to take the small sample sizes into account when interpreting these figures.

Table B-22 – Other visitors encountered (%) and impact on enjoyment (row – number of respondents)

Base: Respondents who have been to local FC sites (38)

	Total	Increased enjoyment a lot +2	Increased enjoyment a little +1	Made no difference 0	Decreased a little -1	Decreased a lot -2	Score
Walkers	26	2	3	21	-	-	0.27
Children	19	3	-	15	1	-	0.26
Cyclists	17	1	-	15	1	-	0.06
Motorbikers/moto cross	9	2	1	4	1	1	0.22
Horse riders	7	1	1	4	1	-	0.29
Vehicles driving in wood	5	-	-	3	1	1	-0.60

As the table illustrates, encounters with walkers and children usually had no negative impacts or were positive. While positive encounters were recorded with horse riders, and motorbiker, these aspects, along with vehicles driving in the wood, were more likely to have a negative impact.

Those respondents who stated that other visitors had decreased their enjoyment were asked to provide reasons, as detailed below (the number of respondents giving each reason is shown in brackets):

- *Children* – too noisy (1), badly behaved/unruly (1).
- *Motorbikers/ moto cross* – unsafe (1).
- *Vehicles in the wood* –unsafe (1).

Disturbances to visit

Respondents were also presented with a list of potential negative disruptions and asked what impact, if any, each had on their visit. As the table below illustrates, the majority of respondents indicated that each of the potential impacts either 'didn't reduce their enjoyment' or that they did not know (suggesting the impact had not been encountered).

However, the disruptions most likely to have a more negative effect were litter or fly tipping (24%, 9 respondents), dogs/dog dirt (18%, 7 respondents) and vandalised, missing or damaged signposts (13%, 5 respondents).

Table B-23 – Impact of potential issues on enjoyment (row – number of respondents)

Base: Respondents who have been to local FC sites (38)

	Didn't reduce enjoyment 0	Decreased a little 1	Decreased a lot 2	Don't know	Score
Litter or fly tipping	28	5	4	1	0.35
Dogs and dog dirt	29	6	1	2	0.22
Vandalised, missing or damaged signposts	33	3	2	-	0.18
Forest operations such as felling	31	7	-	-	0.18
Noise from other users or motorised sports	31	5	-	2	0.14
Muddy tracks	34	3	-	1	0.08

- = no responses

When asked to state why these specific issues had a negative impact on their enjoyment, the following reasons were provided (numbers of respondents providing each response are shown in brackets).

Noise from other users or motorised sports –noisy/annoying (2), lack of respect for others (1), spoils the peace (1), too fast/ dangerous (7).

Litter/fly tipping – untidy/eyesore (7), detracts from the area (2).

Dogs and dog dirt – unhygienic (3), I clear up – others should (1), too much on paths (1), health risk to children (1), uncontrollable dogs/not on leads (1).

Muddy tracks – make it difficult to walk (1), slippery (1).

Vandalised or missing signposts – get lost (2), statues vandalised (1), unsafe/dangerous (1).

Forest operations – ruins the landscape (2), ugly/messy (2), noisy (1).

Respondents were asked to indicate what else, if anything had decreased their enjoyment. Encouragingly, most respondents could not think of anything or did not state any other issues (82%, 31 respondents). However, the issues that were mentioned included too much litter (1 respondent) and unruly cyclists/motor cyclists (1).

Improvements

Users of the local FCW forests were also asked what, if anything they would like to see changed or improved to make future visits more enjoyable.

27 of the 38 respondents who had visited at least one of the sites stated that there was nothing that needed to be improved. Some of the suggestions that were made are as follows, with the number of respondents making these shown in brackets:

- Provide/improve café (2 respondents, Coed Sarnau only);
- More information (2 respondents);
- Provide more activities (2 respondents).

Other suggestions (mentioned by one respondent each) related to the provision of litter bins, better signage, better toilet facilities and separate tracks for motor bikes and horses.

Some of the specific suggestions provided are reproduced below

Bala

“More forestry signs. Direction signs. More nature. More sundries and wildlife.”

“More events for everyone.”

“Stay as nature intended.”

Coed Sarnau

“More refreshments during summer time.”

C. Postcode analysis

Introduction

To ensure that the sample interviewed for the purposes of this survey was representative of local residents, an analysis of demographic characteristics was undertaken using CACI's consumer classification system ACORN.

ACORN is a geodemographic analysis system which matches postcodes to the results of the Census and other national sources, thereby providing a detailed demographic profile of residents in a predefined area. Using this profiling system all UK postcodes are categorised into one of the following 13 broad neighbourhood groups:

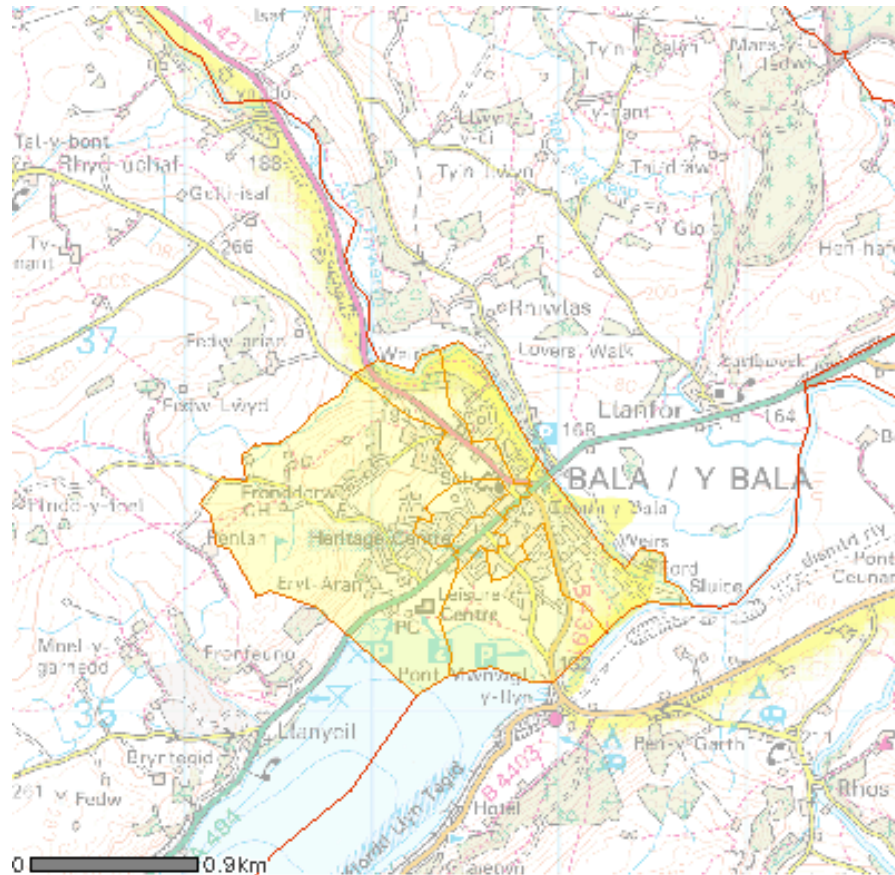
Group 1	Affluent Greys
Group 2	Aspiring singles
Group 3	Blue collar roots
Group 4	Burdened singles
Group 5	Flourishing families
Group 6	High-rise hardship
Group 7	Post-industrial families
Group 8	Prudent pensioners
Group 9	Secure families
Group 10	Settled suburbia
Group 11	Starting out
Group 12	Struggling families
Group 13	Wealthy executives

These 13 groups are then divided further into 56 specific classifications, which are listed in the appendix and described in detail in the ACORN user guide which is provided separately.

The focus of this study was households within the Bala and Llanidloes area (Coed Sarnau). The following sections provide the key results of the analyses of the population profile in each of these 'catchment' areas.

Bala

Survey catchment area



There are some 950 households within the highlighted area. As illustrated in Table C-1, the ACORN classifications in greatest abundance in this area are ‘skilled workers, semis and terraces’, ‘older people, rented terraces’ and ‘families and single parents, semis and terraces’ which together represent 45% of the area’s population. By comparison, these categories represent just 7% of the UK population as a whole.

Key characteristics of households defined as ‘skilled workers, semis and terraces’ (18% of residents) include the following:

- Similar age profile to UK as a whole, with a mixture of singles, couples, families and retired people.
- Predominantly white population.

- Terraced and semi detached housing (2-3 bedrooms) with most residents buying their home on a mortgage.
- Car ownership in line with UK average. Tend to be lower value models, often bought second-hand.
- Employment in blue-collar manufacturing and manual occupations and shop work.
- Read tabloid press, with leisure activities including camping, angling, bingo and visiting the pub.

The key characteristics of households defined as 'older people, rented terraces' (14% of residents) are:

- High proportion of older people, particularly over 75. Single households common, many are pensioners.
- Predominantly white population, few black or Asian residents.
- Those who work tend to be employed in manual and factory jobs or shop work. Unemployment 40% above UK average and long-term illness is 60% above.
- Most live in small 2-3 bedroom terraced houses, with some in flats (mainly low rise purpose built).
- Higher proportion of residents rent their properties. High level of re-mortgaging amongst those who own their properties.
- Car ownership is low. Main forms of transport are walking, cycling and public transport.
- Read tabloid press. Angling, racing, bingo, watching cable TV, listening to music and going to the pub are popular leisure pursuits.

The key characteristics of households defined as 'families and single parents, semis and terraces' (12% of residents) are:

- Large families – many with three or more children and half are single parent families.
- Predominantly white population, few black or Asian residents.

- Unemployment levels are double the national average, with incomes very low. Work tends to be in routine factory and shop jobs.
- Most live in small 2-3 bedroom council owned semis and terraced houses.
- Car ownership is low. Main forms of transport are walking and public transport.
- Read tabloid press. Fishing, betting, listening to music and cooking are popular leisure pursuits.

The other categories in highest abundance within the catchment area population include:

'Mature couples, smaller detached homes' – this group represents 11% of households in the catchment area, compared to 2% in the UK population. Key traits include mainly Empty Nesters and retired couples between the ages of 45 and 75, many of whom own their homes outright. Homes are typically three bedroom detached houses and bungalows. Previous employment tends to have been in middle management or supervisory roles and there is a reasonable level of disposable income now that children have left home. Residents of this type of area tend to have at least one cat, which is often bought new and take package holidays in the UK and Europe. Gardening is a key leisure activity.

'Low income older people, smaller semis' – this group represents 11% of households in the catchment area compared to 3% in the UK as a whole. The main characteristics of this group include older population, many with a long-term illness. Most rely on a state pension and those working tend to be in routine shop, factory and manual occupations. Housing is usually rented from the council or a housing association and usually consists of one or two bedrooms. Few residents own a car. Spending tends to be limited to funeral plans, betting, bingo and going to the pub, with other leisure activities limited.

More details of the characteristics of each of the ACORN classifications are contained in the user guide which is provided separately. The table overleaf provides a full profile of the area within the Bala area.

Table C-1 – Residents Bala catchment by ACORN classification

ACORN Description	Households within 1 mile of wood		UK %
	N	%	
Skilled workers, semis and terraces	171	18.0%	3.3%
Older people, rented terraces	136	14.3%	1.8%
Families and single parents, semis and terraces	123	13.0%	2.1%
Mature couples, smaller detached homes	102	10.7%	2.0%
Low income older people, smaller semis	100	10.5%	3.0%
Older people, flats	87	9.2%	1.9%
Well-off managers, detached houses	71	7.5%	3.7%
Older, affluent professionals	65	6.8%	1.8%
Low income families, terraced estates	54	5.7%	2.6%
Lower income, older people, semis	23	2.4%	2.1%
Middle income, older couples	9	1.0%	3.0%
Middle income, home owning areas	9	1.0%	2.9%
TOTAL	950		

- Leisure time is limited but interests include wildlife and the environment, gardening and hiking. Holidays tend to be taken with the UK and Ireland to accommodate working patterns.

The key characteristics of households defined as *'Mature couples, smaller detached homes'* are:

- Mainly Empty Nesters and retired couples between the ages of 45 and 75.
- Many of own their homes outright and these are typically three bedroom detached houses and bungalows.
- Previous employment tends to have been in middle management or supervisory roles and there is a reasonable level of disposable income now that children have left home.
- Residents of this type of area tend to have at least one cat, which is often bought new and take package holidays in the UK and Europe. Gardening is a key leisure activity.

The other categories within the catchment area population were:

'Low income older people, semis' – some 4% of households in the catchment area were in this category compared to 2% of the UK population. The main characteristics of this group are high numbers of single pensioners, older and retired couples. Housing tends to be 2-3 bedroom semi-detached houses, with ownership fairly even split between owned outright, own with a mortgage and renting from a housing association. Those who work tend to have manufacturing, retail and other routine occupations. Most households have one, relatively inexpensive, car and holidays are often in a caravan or to the Mediterranean. Gardening and meals at a pub are popular leisure pursuits.

'Well off managers, detached houses' – this group represents 4% of households in the catchment area, compared to 4% in the UK population. Key traits include a mix of couples with older children, Empty Nesters and retired residents. Houses are large, detached houses and many own their homes outright. Two or more cars, one usually reasonably expensive, are common. Leisure pursuits include golf, gardening, bird watching, hiking and visits to attractions such as stately homes.

The table below provides a full profile of the population of this area.

Table C-2 – Residents of Coed Sarnau catchment by ACORN classification

ACORN Description	Households within 1 mile of wood		UK %
	N	%	
Farming communities	680	81.4%	2.0%
Mature couples, smaller detached houses	94	11.3%	2.0%
Lower income, older people, semis	32	3.8%	2.1%
Well off managers, detached houses	29	3.5%	3.7%
TOTAL	835		

D. Appendices

Results from other community surveys

	Thames Chase	South Yorkshire	South Wales	North West England	South West England	North & Mid Wales	AVERAGE
Year	2004	2005	2006	2006	2007	2007	
BASE - total	323	313	503	319	293	310	
BASE - visitors	46	62	154	37	208	38	
BENEFITS OF SITE (all respondents)							
Good for wildlife	76	72	75	74	82	75	76
Improves the landscape and look of the area	63	63	69	51	70	43	60
Creates places for other people to take part in outdoor recreation	64	58	62	57	77	47	61
Creates a natural environment for future generations to enjoy	70	56	68	60	77	56	65
Improves the reputation of the area	48	48	52	45	58	35	48
Somewhere for birdwatching and other nature studies	53	39	44	36	56	45	46
Attracts tourists to the area	n/a	38	43	26	40	45	38
Creates areas for my personal use	49	36	43	44	60	24	43
FREQUENCY OF VISITS							
Average visits per year	46	80	76	88	33	4	55

	Thames Chase	South Yorkshire	South Wales	North West England	South West England	North & Mid Wales	AVERAGE
ACTIVITIES UNDERTAKEN DURING VISIT							
Active outdoor pursuits	n/a	98	99	92	98	97	97
Walks of under 2 miles	n/a	55	58	70	46	50	56
Dog walking	n/a	47	51	49	34	26	41
Walks of over 2 miles	n/a	37	42	35	46	37	39
Cycling or MTB	n/a	18	12	22	20	8	16
Running or jogging	n/a	8	6	11	12	5	8
Passive outdoor pursuits	n/a	13	25	24	25	32	24
Picnics, BBQ, etc.	n/a	8	12	3	8	13	9
Birdwatching or other nature studies	n/a	3	9	19	13	18	12
LENGTH OF VISIT							
Average (mins)	36	71	84	73	79	85	71

	Thames Chase	South Yorkshire	South Wales	North West England	South West England	North & Mid Wales	AVERAGE
SATISFACTION SCORES							
Provision of all ability trails	n/a	n/a	1.78	2.9	3.3	3.0	2.7
Availability of staff at the site (e.g. rangers)	2.24	2.35	n/a	1.9	2.7	1.8	2.2
Being able to enjoy scenery and views	3.59	3.58	4.03	3.62	4.0	3.8	3.8
Being able to enjoy the wildlife	3.61	3.4	3.67	3.39	3.7	3.8	3.6
Being able to get fit and healthy	3.67	3.53	3.87	3.37	3.9	3.7	3.7
Being able to spend time with family and friends	3.65	3.53	3.89	3.41	4.0	3.7	3.7
Choice of paths for walking	3.38	3.34	3.03	3.03	3.7	3.5	3.3
Choice of trails for cycling	3.19	3.17	2.54	2.92	n/a	3.0	3.0
Choice of trails for other activities (e.g. horse riding)	2.89	3.2	2.18	2.62	3.4	3.3	2.9
Clear signposting on footpaths	3.36	2.94	n/a	2.97	n/a	3.2	3.1
Enough car parking	3.25	3.13	n/a	n/a	n/a	n/a	3.2
Feeling happy to leave your car in the car park	3.26	3.23	n/a	n/a	n/a	n/a	3.3
Feeling safe in the forest	3.49	3.19	3.34	3.08	3.7	3.8	3.4
Information about the site's history and conservation	2.67	2.49	n/a	2.22	3.1	2.3	2.6
Leaflets and maps to help you find your way around	3.00	2.36	n/a	1.96	2.9	2.5	2.6
Solitude, peace and quiet	3.67	3.45	3.84	3.53	3.9	3.6	3.7
Value for money of your whole trip or day out	3.67	3.45	4.11	3.76	4.2	3.8	3.8
Convenient/ close to home	n/a	n/a	4.4	3.92	4.4	3.7	4.1
Picnic tables/ seats	n/a	n/a	1.82	2.45	2.8	3.4	2.6

	Thames Chase	South Yorkshire	South Wales	North West England	South West England	North & Mid Wales	AVERAGE
IMPACT OF OTHER USERS							
Walkers	0.60	0.2	0.1	0.5	0.1	0.3	0.3
Children	0.50	0.1	0.1	0.6	0.2	0.3	0.3
Cyclists	0.50	0.1	-0.1	0.3	-0.1	0.1	0.1
Motorbikers/moto cross	0.00	-1.3	-1.3	-1.2	0.2	0.2	-0.6
Horse riders	0.50	0	-0.1	0.2	-0.7	0.3	0.0
Vehicles driving in wood	n/a	-1.9	-1	-1.25	-0.3	-0.6	-1.0
OTHER NEGATIVE IMPACTS							
Forest operations such as felling	0.04	0.03	0.2	0.1	0.1	0.2	0.1
Muddy tracks	0.13	0.27	0.4	0.4	0.1	0.1	0.2
Dogs and dog dirt	0.57	0.29	0.42	0.5	0.3	0.2	0.4
Vandalised, missing or damaged signposts	0.37	0.3	0.3	0.5	0.3	0.2	0.3
Litter or fly tipping	0.39	0.42	0.54	0.5	0.3	0.4	0.4
Noise from other users or motorised sports	0.20	0.52	0.61	0.7	0.1	0.1	0.4

ACORN classifications

CATEGORY	% UK POP	GROUP	% UK POP	GROUP	TYPE	% UK POP
1 WEALTHY ACHIEVERS	25.1	A WEALTHY EXECUTIVES	8.6	A	1	1.7
					2	1.5
					3	2.7
					4	2.6
		B AFFLUENT GREYS	7.7	B	5	1.8
					6	2.0
					7	1.9
					8	2.0
		C FLOURISHING FAMILIES	8.8	C	9	2.1
					10	2.3
					11	3.7
					12	0.6
2 URBAN PROSPERITY	10.7	D PROSPEROUS PROFESSIONALS	2.2	D	13	0.9
					14	1.4
		E EDUCATED URBANITES	4.6	E	15	1.1
					16	0.9
					17	0.6
					18	1.1
					19	0.9
					20	0.6
		F ASPIRING SINGLES	3.9	F	21	1.6
					22	1.2
					23	0.4
					24	1.0
3 COMFORTABLE OFF	26.6	G STARTING OUT	2.5	G	25	1.4
					26	1.9
		H SECURE FAMILIES	15.5	H	27	2.9
					28	2.6
					29	3.3
					30	3.6
					31	1.1
					32	0.9
		I SETTLED SUBURBIA	6	I	33	3.0
					34	2.1
					35	0.7
		J PRUDENT PENSIONERS	2.6	J	36	1.9
37	0.5					
4 MODERATE MEANS	14.5	K ASIAN COMMUNITES	2.5	K	38	1.1
					39	2.8
		L POST-INDUSTRIAL FAMILIES	15.5	L	40	2.1
					41	3.3
		M BLUE-COLLAR ROOTS	6	M	42	2.8
					43	1.8
5 HARD-PRESSED	22.4	N STRUGGLING FAMILIES	14.1	N	44	3.3
					45	3.0
					46	1.4
					47	2.6
					48	2.1
					49	1.7
		O BURDENED SINGLES	4.5	O	50	1.8
					51	1.9
					52	0.8
		P HIGH-RISE HARDSHIP	1.6	P	53	0.8
					54	0.9
		Q INNER CITY ADVERSITY	2.1	Q	55	1.1
56	1.1					
	22.4	U UNCLASSIFIED	0.3	U	57	0.3

Questionnaire

