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Research Report

Quality of the
Visitor Experience:
Afan Forest Park
2013



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Natural Resources Wales /
Forestry Commission England

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1. Executive summary

1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted: 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed: 14 per year (7 in each country). All selected sites in England are high usage, while sites in Wales consist of a combination of medium and high usage sites. In 2013, interviews were conducted at 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

This report summarises the findings from the 192 visitor interviews conducted at Afan Forest Park in 2013. Throughout the report, comparisons have been made to the all Wales average (aggregated data from all 7 sites surveyed in 2013) – previous research has not been conducted at Afan Forest Park.

1.2 Afan Forest Park

Afan Forest Park (formally and locally known as Afan Argoed Country Park) is a 48-square-mile forest park set in the Afan Valley in Neath Port Talbot.

It is well known for its mountain biking and hiking or hillwalking trails, ranging from a 30 minute amble to a 3-4 hour ramble - there are also miles of public rights of way and a network of 25 miles of disused railway lines which can be used for walking and cycling. These are called the Family Routes, or the Low Level Cycleway. These also form a link between the mountain bike trails.

The Forest Park Centre has camping facilities, a cafe, small local museum on mining, bike shop and a gift shop.

In 2002, Afan Forest Park was officially twinned with the C.W.Nicol Woodland Trust in Kurohime in the Nagano prefecture of Japan. In Afan Forest Park, 'Kanji Wood' was developed on three kanji characters; human, forest and life and landscaped with Japanese trees, shrubs and sculptures.

The Forest Park runs an extensive schools program with its Education Ranger and also organises adult education from the Study Room at the Forest Park Centre. They also do an annual program of walks and activities and have a wildlife puzzle trail for families.

1.3 Perceptions of the site

Perceptions of Afan Forest Park as a place to visit were very positive. This was also the case across all Welsh sites.

Over half the visitors rated the site as 'excellent' (55%), which was slightly lower than the all Wales 'excellent' figure (62%). Over a third rated the site as 'very good' (34%), whilst 7% rated it as 'good'.

Similarly, ratings of how safe and welcoming Afan Forest Park was were also very positive. Nearly half of the visitors gave this measure an 'excellent' rating (44%), whilst another 36% rated it as 'very good'.

When asked whether they would be likely to recommend Afan Forest Park as a place to visit to a friend or relative (using a score of 0 to 10), scores for Afan Forest Park and all Welsh sites in general were extremely positive. The average score for Afan Forest Park was 9.1 out of 10, with an all Wales score of 9.4 out of 10.

1.4 Strengths of the site

The importance of cycling at Afan Forest Park came through strongly in the comments received. The aspect of the site liked by the highest proportion of visitors was the cycle trails and the opportunity to cycle (44%). This was significantly higher than the all Wales average (17%).

Nearly as many mentioned the scenery, views and beauty (43%), whilst peace, tranquillity and relaxation were mentioned as a favourite at Afan Forest Park by 30%.

The walks, paths and trails at Afan Forest Park were also mentioned by 30%, whilst a fifth talked about exercise and keeping fit (21%), and the site being close to home and convenient (20%).

1.5 Areas for improvement

Nearly a third of visitors to Afan Forest Park could not think of anything that would add to their enjoyment, and only made positive comments (28%).

There were however calls by minorities for some action: the most frequently requested improvement was the provision of more trails, paths and cycle tracks (15%). Those mentioned by 5% or more are listed below:

- More paths / trails/ cycle tracks (15%)
- Improved signage and maps (9%)
- Improved maintenance and surfacing of paths /trails (8%)
- More dog poo bins (7%)
- More bins generally (6%)
- Improved toilets / showers (5%).

1.6 Visitor profile

The majority of visitors to Afan Forest Park had visited the site before (79%). This proportion was higher than the all Wales average of 74% who said they had visited their respective forest or woodland site before. Four out of five of the visitors to Afan Forest Park travelled for less than three hours to get to the site (79%).

The gender profile of visitors to the Afan was predominantly male (70% of visitors were men compared with 30% women), and whilst this bias was seen across all the Welsh sites it was less pronounced (59% male vs. 41% female).

In terms of age, the Afan Forest Park visitors tended to be a little younger than the all Wales figure e.g. 53% of Afan Forest Park visitors were aged 16-44 years compared with 46% for all Wales. There was also a lower percentage of retired people visiting the Afan Forest Park site (16%) than the all Wales average (19%).

The socio-economic profile of visitors to Afan Forest Park was made up predominantly of those in the ABC1 category (professionals and middle managers) who accounted for 64% of the sample. Less than one in three of visitors to Afan Forest Park (28%) belonged to the C2DE social groups (skilled and semi-skilled manual workers and those receiving benefits.)

More visitors to Afan Forest Park had a limiting illness, over one in ten (12%) than the average for all Wales (5%), and nearly a third of visitors had children in their household (32%): this is in line with the findings for all Wales (30%).

2. Introduction

2.1 Background

The woodland estate managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) covers some 105,000 hectares and 256,000 hectares respectively.

Each year in Wales, around 4 million visits are made to the estate including 0.5 million to sites with visitor centres. In England, around 40 million visits are made to the estate each year, including 3 million to sites with visitor centres.

The use and enjoyment of woodlands can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming woodlands provide an excellent setting for outdoor recreation such as walking, cycling and horse riding. Regular outdoor exercise lowers rates of obesity, cardiovascular disease, osteoporosis and type-2 diabetes as well as some cancers. It can contribute to a lifelong pattern of healthy living if encouraged amongst the young, and in the elderly it contributes to greater mobility and fewer injuries associated with ageing.

The experience of a natural environment and the opportunity for exercise can assist in treating people with mental health problems, in modifying anti-social behaviour in young children and adolescents, in supporting people dealing with stress and depression, and can also help to improve concentration in the workplace.

The provision of a quality visitor experience will help to encourage both repeat and new visitors. The quality of visitor experience depends not only on the facilities provided at a site (notice boards, playgrounds, toilets, car park, walking trails), but also on the 'sense of welcome' that the woodland provides. This 'sense of welcome' in turn depends both on the maintenance of the woodland (rubbish, dog dirt, brambles, mud) and also the nature of the woodland itself (light & open or dense & dark).

Maintaining or improving the quality of experience at NRW and FCE managed sites is part of a wide-ranging programme of work to encourage the development and promotion of woodland access throughout Wales and England with suitable infrastructure and well managed woodlands that feel safe and welcoming.

NRW and FCE have commissioned a variety of visitor surveys in recent years in relation to the usage of their forests and woodlands. The Quality of the Visitor Experience Survey has been conducted since 2006, but has been run in its current format since 2010-2011. The main aims of the survey are:

- To provide information on the quality of visitor experience at each site
- Use a set of standard questions so that the quality of visitor experience at each site can be scored, benchmarked and tracked over time
- For sites in Wales, also use a set of tailored questions at each site to give information on how the visitor experience at that particular site could be improved.

2.2 Research programme

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed; 14 per year (7 in each country). All selected sites in England are categorised as being high usage, while sites in Wales consist of a combination of medium and high usage sites.

Table 1 below details the sites surveyed in 2013, along with the number of interviews completed at each.

Table 1: Interviewing sites and number of interviews conducted

England		Wales	
Site	No. of interviews	Site	No. of interviews
Alice Holt	241	Afan Forest Park (H)	192
Cannock Chase	223	Brechfa (M)	138
Cardinham Woods	237	Gwydyr (M)	147
Grizedale	211	Hafren (M)	130
Sherwood Pines	207	Moel Famau (M)	190
Wendover Woods	216	Newborough (H)	182
Westonbirt	210	Whitestone (M)	135
TOTAL	1,545	TOTAL	1,114

* H = High usage; M = Medium usage

Interviews are conducted face-to-face with visitors who are exiting the site or coming to the end of their visit, with interviewing points situated at key access points.

The core interviewing period will run from March to October each year. However, during 2013, interviewing was concentrated in August, September and October, with a small number of interviews conducted in July and November.

At Afan Forest Park, interviewing took place between 18th July and 29th September 2013, and a total of 192 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Afan Forest Park in 2013, and includes individual sites scores on key visitor measures. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites). Previous research has not been conducted at Afan Forest Park.

Results are presented as rounded percentages (no decimals), which may mean that some percentages do not add up exactly to 100%.

2.4 Data tables

Comprehensive data tables are available separately, and contain the following cross-breaks:

- Home region
- Home nation
- Age
- Ethnicity
- Gender
- Social class
- Group composition
- Ages of children
- Day trip vs. staying visitor
- First time vs. repeat visitor
- Limiting illness
- Quality of experience.

3. Visitor profile information

3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Afan Forest Park. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2013.

The gender profile of visitors to the site was predominantly male (70% of visitors were men compared with 30% women), and whilst this bias was seen across all the Welsh sites it was less pronounced (59% male vs. 41% female).

In terms of age, the Afan Forest Park visitors tended to be a little younger than the all Wales figure e.g. 53% of Afan Forest Park visitors were aged 16-44 years compared with 46% for all Wales.

Three out of five (60%) of the visitors to Afan Forest Park were working full time (the same as the all Wales figure), whilst 16% were retired (compared with a figure for all Wales of 19% retired).

The socio-economic profile of visitors to Afan Forest Park was made up predominantly of those in the ABC1 category (professionals and middle managers) who accounted for 64% of the sample. However, this was lower than across all the Welsh sites (70%). Less than one in three of visitors to Afan Forest Park (28%) belonged to the C2DE social groups (skilled and semi-skilled manual workers and those receiving benefits).

More visitors to Afan Forest Park had a limiting illness compared to the average for all Wales (12% vs. 5%).

Nearly a third of visitors had children in their household (32%): this is in line with the findings for all Wales (30%).

The overwhelming majority of visitors to Afan Forest Park were white British / Welsh / Irish (93%), with only a small number of visitors describing their ethnicity as 'White – other (2%) or 'Black / Asian / mixed' (2%).

Just over a quarter of visitors to Afan Forest Park spoke Welsh (26%): 6% fluently and 20% non-fluently. This is higher than the all Wales average of 20% Welsh speakers (8% fluent, 12% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2013

		Afan Forest Park %	All Wales %
Gender	Male	70	59
	Female	30	41
Age	16 - 24	8	6
	25 - 34	16	15
	35 – 44	29	25
	45 – 54	18	21
	55 – 64	14	18
	65+	14	15
Social class	AB	35	40
	C1	29	30
Working status	C2	21	19
	DE	7	9
	Refused	8	2
	Full-time employee (30+ hours per week)	60	60
	Part-time employee (<30 hours per week)	9	8
	Self-employed	4	6
	Full-time education	4	2
	Unemployed	1	1
Limiting illness	Permanently sick / disabled	1	1
	Retired	16	19
	Looking after home	1	2
	Other	-	<1
	Refused	6	1
	Yes – limited a lot	2	2
	Yes – limited a little	10	3
	No	82	94
Children in household	Refused	6	2
	Yes	32	30
	No	62	69
Ethnicity	Refused	6	1
	White – British / Welsh / Irish	93	96
	White – Other	2	2
	Black / Asian / Mixed	2	1
Welsh speaker	Refused	4	1
	Yes		20
	No		80

Base: All visitors – Afan Forest Park (190); All Wales (1,114)

3.2 Group profile

3.2.1 Size of group

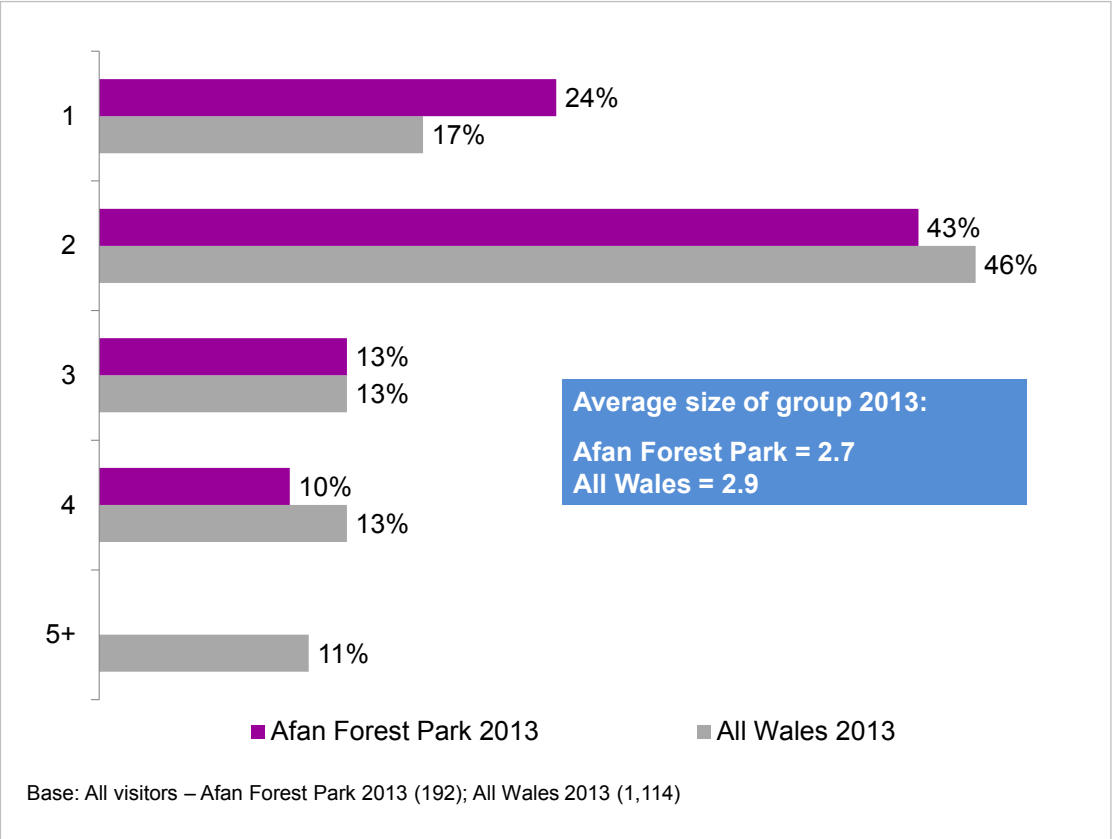
Group sizes at Afan Forest Park were slightly smaller (averaging 2.7 people) than the all Wales sample (average 2.9 people).

Over two in five of the visitor groups that came to Afan Forest Park consisted of two people (43%) - this was consistent with the all Wales average (46%).

Almost a quarter of the visitors were alone (24%), which is higher than the all Wales average (17%).

Larger groups who visited Afan Forest Park (3+ individuals) accounted for 23% of the total, broadly in line with all of Wales (26%) – see Figure 1 below.

Figure 1: Q1. Total size of the group

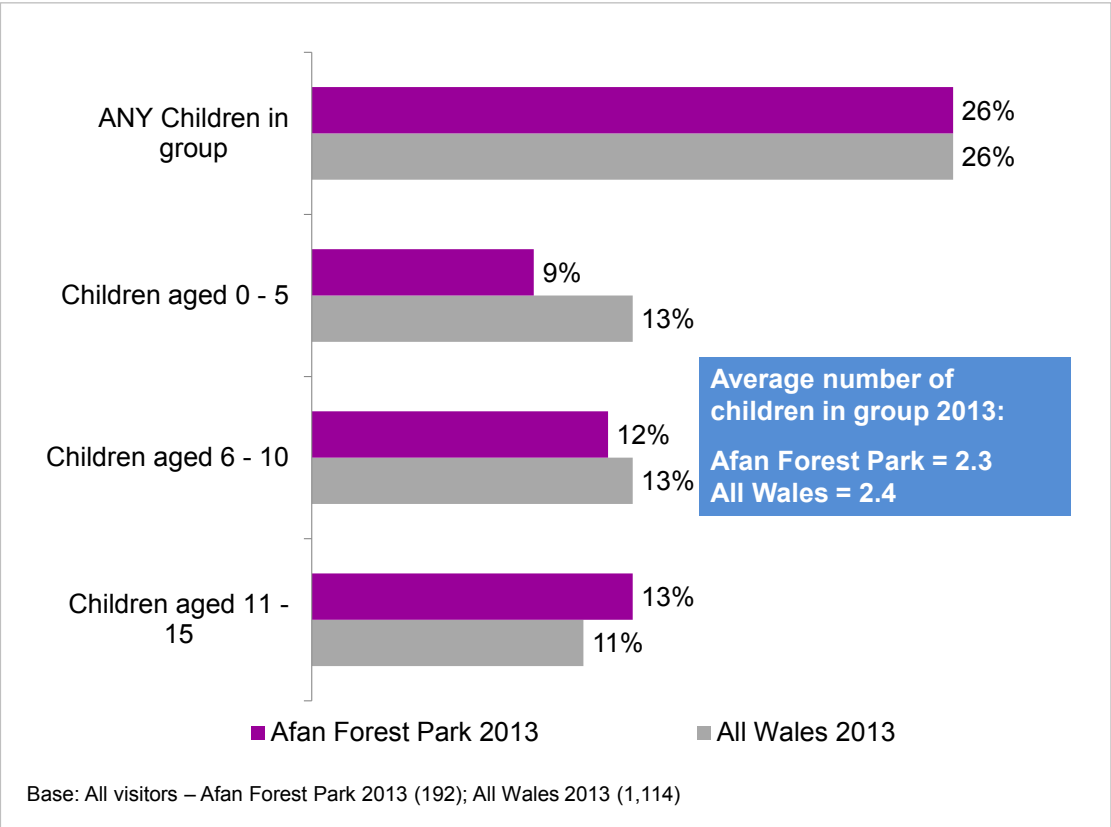


3.2.2 Composition of group

Around a quarter of the groups who visited Afan Forest Park contained children (26%): the same as the all Wales figure. The average number of children per group visiting Afan Forest Park was 2.3 compared with 2.4 in Wales overall.

The age profile of children visiting Afan Forest Park was evenly spread and largely in line with the all Wales profile, although there were fewer in the 0-5 years age group at Afan Forest Park (9%) than in all Wales (13%) – see Figure 2 below.

Figure 2: Q1. Composition of group



4. Profile of visit

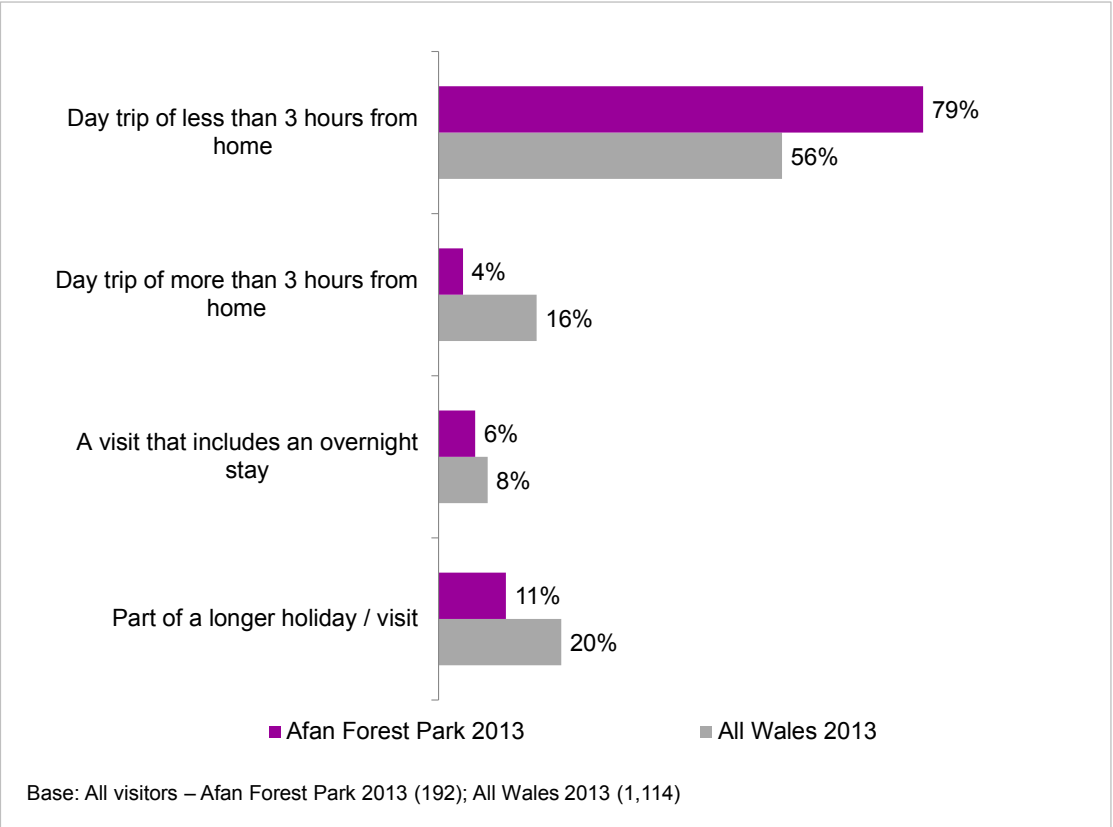
4.1 Type of visit

Most of the visitors to Afan Forest Park travelled for less than three hours to reach the site and intended to stay for the day rather than overnight (79%). This proportion was significantly higher than the all Wales average (56%).

Only 4% of visitors travelled on a day trip of more than three hours to Afan Forest Park, compared to 16% of all Wales visitors travelling for more than three hours on a day trip to their respective forest and woodland sites.

Nearly one in five were staying in the vicinity of Afan Forest Park overnight or as part of a longer holiday (17%). This is lower than the all Wales figure of 28% - see Figure 3 below.

Figure 3: Q2. Type of visit



Amongst the 32 people who said that they were visiting overnight or as part of a longer stay:

- **10** were staying within a **6 mile radius** of the forest park, e.g.
 - At Afan Forest Park on the campsite
 - Aberafan
 - Cwmafon
 - Cymer
 - Bridgend

- **5** were staying within a **10 mile radius** of the forest park, e.g.
 - Neath
 - Hafod Grange
 - Kenfig Hill
 - Swansea
 - Port Talbot

- **16** were staying elsewhere (**outside a 10 mile radius**), e.g.
 - Porthcawl
 - Pontardawe
 - Meadow Croft
 - Brecon Beacons
 - Gowerton
 - Cardiff
 - Pembroke
 - Tenby
 - Blaencwm
 - Merthyr Tydfil

- **1** lived **nearby**.

4.2 Visitor origin

Visitors were asked to provide their postcode in order to determine their area of residence.

Almost three fifths of the visitors to Afan Forest Park came from South West Wales (57%), with the majority of the remainder coming from outside Wales (29%) and from England in particular (21%).

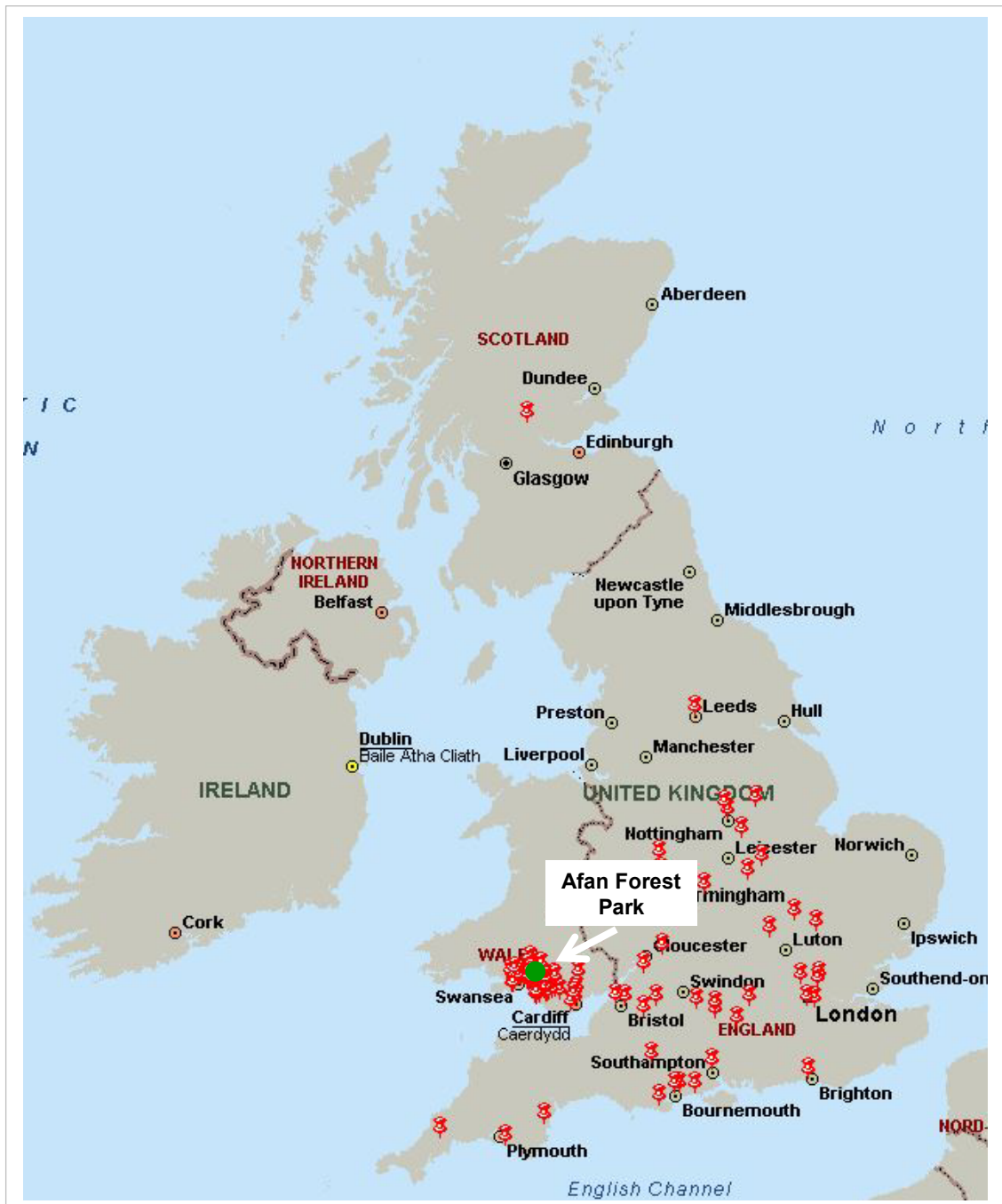
A higher proportion of visitors to Afan Forest Park came from Wales (71%), than Welsh visitors to other Welsh sites (57%) – Table 3 below and Figure 4 overleaf provide more details.

Table 3: Visitor origin 2013

		Afan Forest Park %	All Wales %
Home region	North Wales	-	23
	Mid / West Wales	2	14
	South West Wales	57	11
	Valleys	6	2
	South East Wales	6	7
	Outside of Wales	29	43
Home nation	Wales	71	57
	England	21	40
	Rest of UK	1	<1
	Abroad	1	1
	Refused	6	2

Base: All visitors – Afan Forest Park (190); All Wales (1,114)

Figure 4: Map of visitor origin for Afan Forest Park



4.3 Frequency of visits

4.3.1 First-time visitors

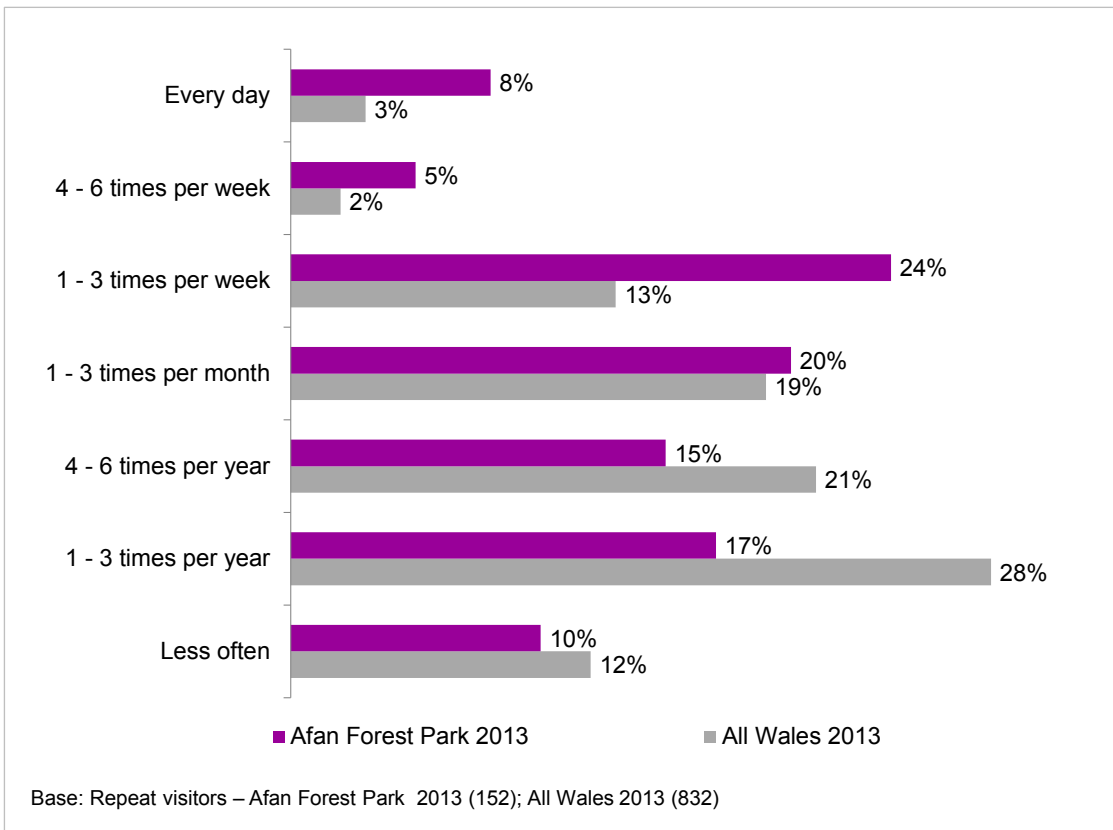
A fifth (21%) of visitors to Afan Forest Park were first time visitors. This was a little lower than the all Wales figure for people who said they had never visited their respective forest and woodland sites before (25%).

4.3.2 Repeat visitors

Focussing on repeat visitors (79% of the sample), it can be seen that visitors to Afan Forest Park tended to visit more regularly than the average across Wales. Those visiting Afan Forest Park at least once a week totalled 37%, compared with all Wales figure of 18%.

The largest group consisted of those who had visited Afan Forest Park between 1 and 3 times a week (24%), whilst the next largest group was those who visited 1 to 3 times a month (20%) – see Figure 5 below.

Figure 5: Q3. Frequency of visits (where visited the site before)

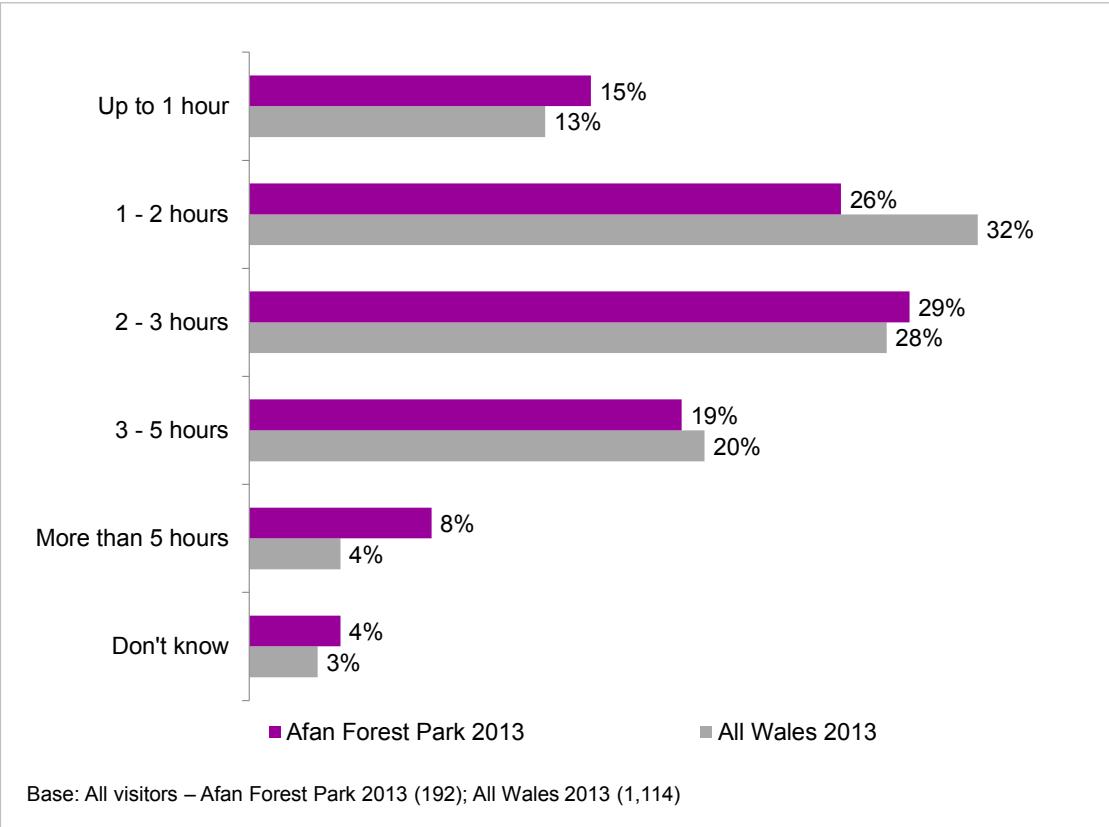


4.4 Length of visit

Visitors to Afan Forest Park stayed on average for 2 hours and 32 minutes. This was comparable to the average length of visit across all sites in Wales (2 hours and 27 minutes).

There were fewer visitors staying at Afan Forest Park for 1-2 hours (26%) than across all Wales (32%), but the converse was true amongst those staying for more than 5 hours (8% Afan Forest Park vs. 4% all Wales) – see Figure 6 below.

Figure 6: Q6. Approximate length of time spent at the site during visit



4.5 Activities undertaken

Visitors were presented with a list of activities and asked which ones they themselves, or others in their group, had either taken part in already, or intended to take part in during their visit. They were able to choose as many activities as applicable, and could choose activities of a similar nature (e.g. walking on trails and walking off trails).

Table 4 shows the combined figures for the following:

- Activities that visitors had already taken part in
- Activities that other members of the group had already taken part in
- Activities that visitors and other members of their group intended to take part in before they left the site.

The most popular activity undertaken at Afan Forest Park was cycling (54%): this was considerably higher than the overall Welsh average (22%). Cycling on forest roads, tracks or trails was the most popular cycling activity at the site (42%).

Walking was the next most popular activity, enjoyed by over two fifths of visitors to Afan Forest Park (43%). This was however considerably lower than the overall Welsh average figure (73%). Walking on a sign-posted trail was the most popular form of walking at the site (27%).

Other popular activities at the site included using the café / restaurant (26%), and using the visitor centre / shop (14%) –see Table 4 overleaf.

Table 4: Q4a/Q4b/Q5 - Activities taken / intend to take by all members of visitor group

	Afan Forest Park 2013 %	All Wales 2013 %
Cycling on forest roads, tracks or trails	42	19
Cycling off tracks or trails	26	8
TOTAL CYCLING	54	22
Walking on a sign-posted trail	27	48
Dog walking	22	30
Walking but not following sign-posts	11	22
TOTAL WALKING	43	73
Using the café / restaurant	26	7
Using the Visitor Centre / shop	14	3
Admiring the views	10	22
Picnic or barbeque	7	15
Running / jogging	6	3
Photography	3	8
Camping	2	1

Base: All visitors – Afan Forest Park 2013 (190); All Wales 2013 (1,114)

NB – Aggregated scores for cycling and walking indicate that a proportion of visitors took part / intended to take part in more than one type of cycling/walking

Cycling at Afan Forest Park was more popular amongst:

- Men (63%) compared to women (33%)
- ABC1 social groups (62%) compared to C2DE groups (46%)
- Younger visitors (71% of both the 16-34 years and 35-54 years groups) compared to older visitors (55+ years 15%).

4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Walking and cycling activities have been analysed in Table 5 below.

Overall, visits to Afan Forest Park lasted approximately 2.5 hours. The average time spent on walking activities was 1 hour and 34 minutes, whilst the average time spent on cycling activities was 2 hours and 41 minutes. Hence those choosing to cycle were spending over an hour longer at their activity than those choosing to walk around the site – see Table 5 below.

Table 5: Q7 – Time spent taking part in walking at Afan Forest Park (Actual respondents only)

	Total duration of visit	Time spent on any walking	Time spent on any cycling
	2013	2013	2013
Up to 30 minutes	4	15	5
31 – 60 minutes	11	22	4
1 – 2 hours	26	37	29
2 – 3 hours	29	19	33
3 – 5 hours	19	9	27
5+ hours	8	-	7
Don't know	4	4	5
AVERAGE	2 hrs 32 mins	1 hr 34 mins	2 hrs 41 mins

Base: all visitors (190); respondents who walked (81); respondents who cycled (102)

4.7 Money spent in the area as a result of the visit

Visitors to Afan Forest Park were asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Table 6 show the figures calculated by combining the data across all types of spending, and across both lone visitors and visitor groups.

The vast majority of visitors to Afan Forest Park claimed that they would spend up to £5 in the area as a result of their trip (88%). This was higher than the all Wales proportion of 75%.

Only 5% said that they would spend either £6 - £10 or £11 - £20, and 2% claimed they would spend £21 - £50.

The average spend in the area as a result of visiting Afan Forest Park was £3.38, which was significantly lower than the all Wales average of £7.23 – see Table 6 below.

Table 6: Q18a/Q18b – Average spend per person/group – frequency of spending within each price range

	Afan Forest Park 2013 %	All Wales 2013 %
£0 - £5	88	75
£6 - £10	5	12
£11 - £20	5	6
£21 - £50	2	3
£51+	-	3
AVERAGE	£3.38	£7.23

Base: All visitors – Afan Forest Park 2013 (190); All Wales 2013 (1,114)

When looking at individual types of spending, the item that the highest proportion of visitors to Afan Forest Park were likely to spend anything on was food and drink (purchased outside of any accommodation), with nearly half of visitors planning to spend on this (45%). The average spend on food and drink was £7.41, nearly £2 less than the all Wales spend of £9.22.

Another major area of spend was parking, with two fifths (40%) likely to spend an average of £1.21. This was almost double the all Wales average for parking charges of £0.64.

One in six (14%) were likely to spend on transport and a further 9% on accommodation in the area – see Table 7 below.

Table 7: Q18a/Q18b – Average spend across individual items (includes zero spend)

	Proportion of visitors to Afan Forest Park spending anything on this item %	Average £ Afan Forest Park 2013	Average £ All Wales 2013
Food and drink purchased outside any accommodation	45	7.41	9.22
Parking	40	1.21	0.64
Transport including petrol, taxis, public transport	14	4.81	6.83
Accommodation, including food and drink purchased there	9	14.05	15.65
Non-routine shopping	6	0.48	0.95
Other miscellaneous items	3	0.91	0.90
Hiring equipment e.g. boats, bikes or horses	3	1.35	0.27
Admissions fees to attractions	-	-	0.43

Base: All visitors – Afan Forest Park 2013 (190); All Wales 2013 (1,114)

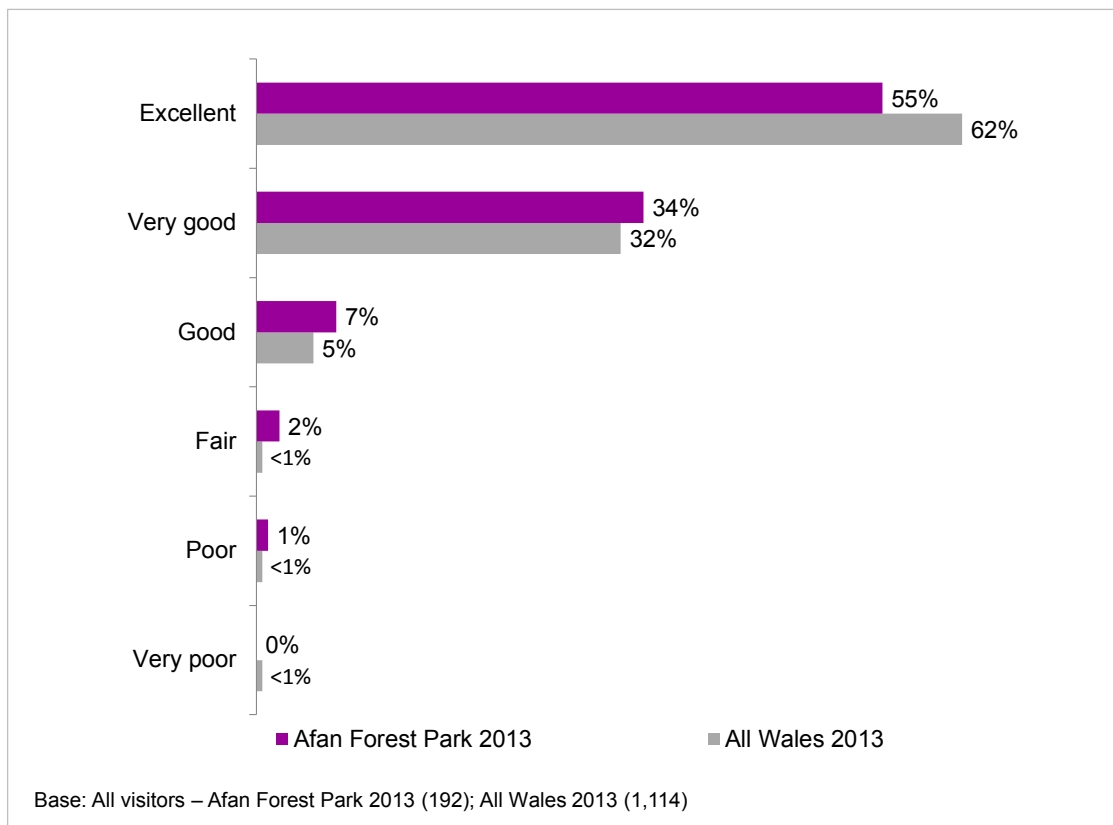
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Afan Forest Park as a place to visit were very positive. This was also the case across all Welsh sites.

Over half the visitors rated the site as 'excellent' (55%), which was slightly lower than the all Wales 'excellent' figure (62%). Over a third rated the site as 'very good' (34%), whilst 7% rated it as 'good': only 2% rated it 'fair' and 1% as 'poor' – see Figure 7 below.

Figure 7: Q16. Rating of the site as a place to visit



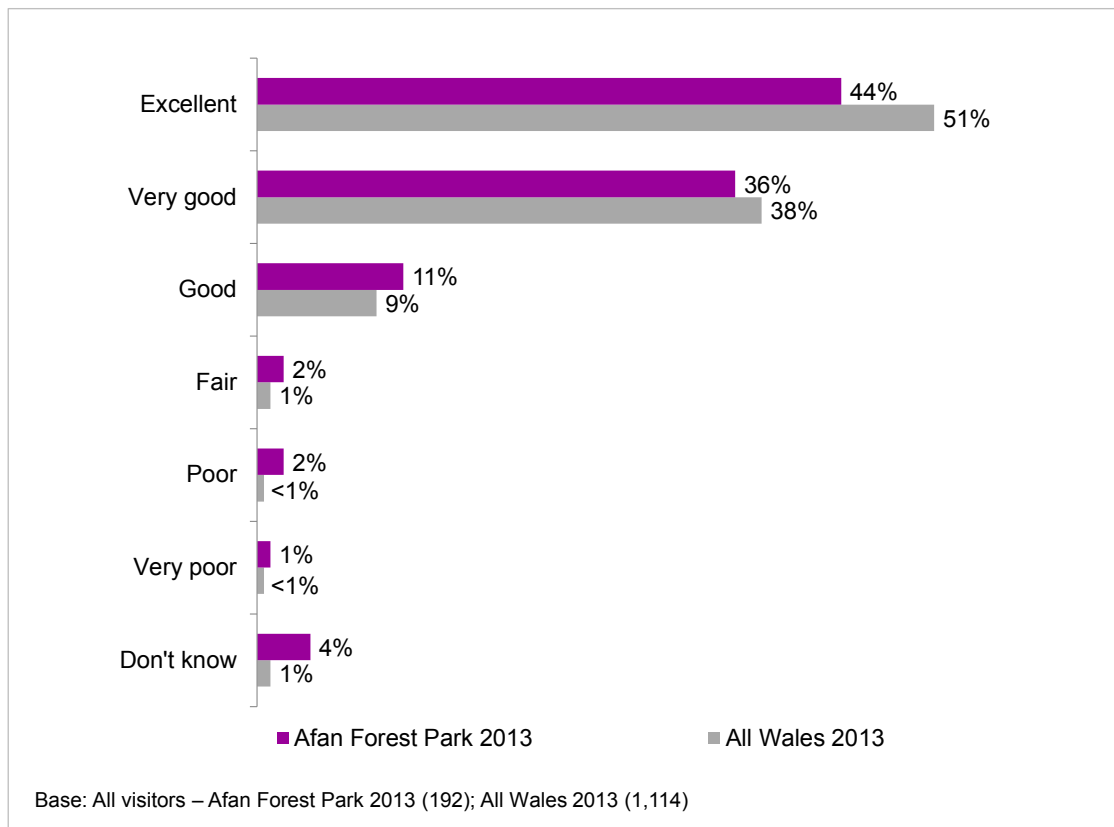
5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Afan Forest Park was were also very positive. This was also the case across all Welsh sites.

Nearly half of the visitors gave this measure an 'excellent' rating (44%), though this was lower than the average across all the Welsh sites (51%). Another 36% gave a 'very good' rating for how safe and welcoming Afan Forest Park felt, similar to the all Wales figure of 38%.

One in ten (11%) rated the site as 'good' for being safe and welcoming, whilst a small minority (5%) rated the site as 'fair', 'poor' or 'very poor' – see Figure 8 below.

Figure 8: Q12. Rating of the site in terms of how safe and welcoming it feels



Those visitors who were able to rate the site in terms of how safe and welcoming it felt were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the site.

Table 8 details the comments provided by 2% or more of the sample at Afan Forest Park, and shows the responses received from those visitors who gave a positive rating (excellent, very good or good) for both Afan Forest Park and all Welsh sites.

There was a fairly extensive list, with no one reason attracting more than 14% of visitor responses. Those mentioned that achieved double figures included 'good signposting / info boards (14%), 'friendly and helpful staff or rangers' (12%), 'good provision of paths, trails and tracks' (12%), and good car parking (10%) – see Table 8 below.

Table 8: Q13 – Reasons for giving a positive rating on how safe and welcoming the site feels – main mentions

	Afan Forest Park 2013 %	All Wales 2013 %
Safe environment generally for all people	15	18
General positive comments	15	14
Well signposted / good maps / info boards	14	9
Friendly / helpful staff or rangers	12	2
Good provision of paths / trails and tracks	12	13
Good car parking	10	8
Good quality facilities	9	6
People are friendly / no jobs	9	3
Peaceful / pleasant / tranquil / relaxing	7	11
The scenery / views / beautiful environment	7	14
Live locally / convenient / easy to get to	6	4
Well laid out / well organised	6	4
Good place for the kids to play / safe for kids	5	5
Clean / tidy / well maintained	4	6
Plenty to do / has everything you want	4	2
Away from roads / no cars / cars drive slowly	3	1
Good café / catering	3	1
Never had any problems	3	4
Been before / familiar with it	2	3
Good value for money / cheap / free	2	<1

Base: Visitors rating the site as excellent, very good or good – Afan Forest Park 2013 (175); All Wales 2013 (1,085)

5.3 Recommending the site as a place to visit

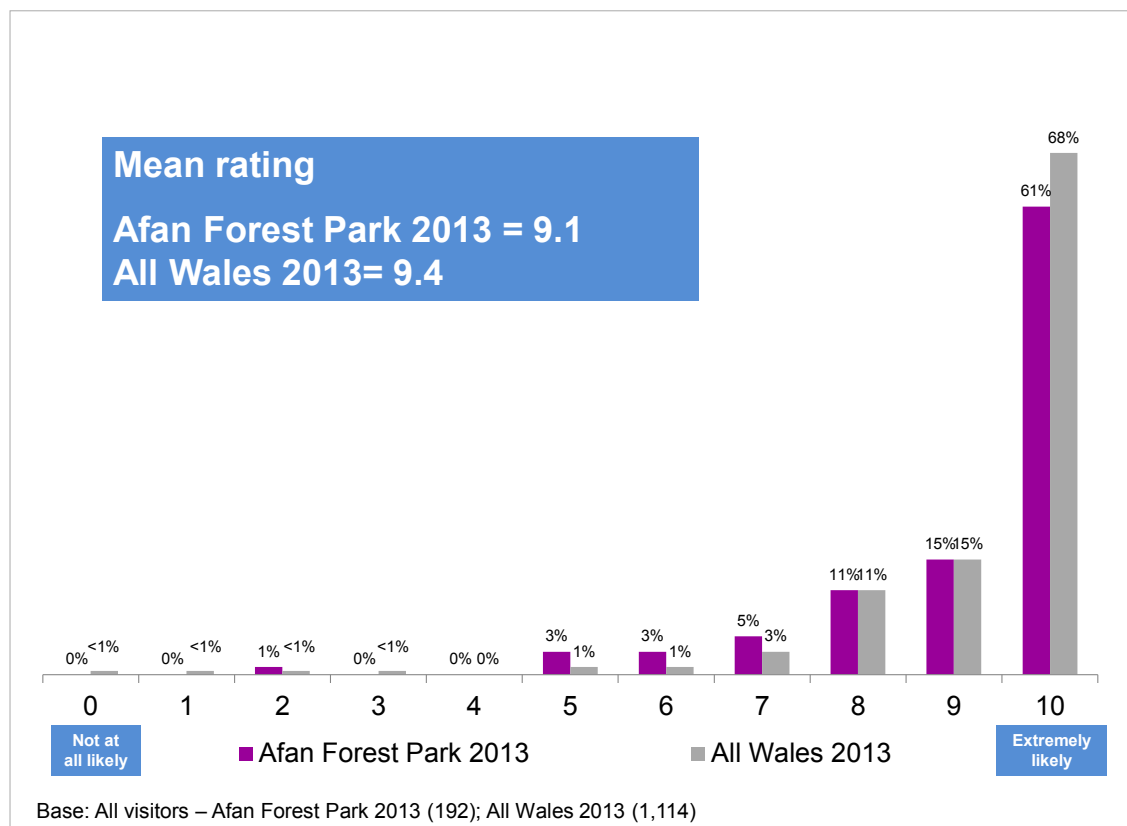
Visitors were asked whether they would be likely to recommend Afan Forest Park as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Afan Forest Park and all Wales sites generally were extremely positive: only 7% gave Afan Forest Park a score of less than 7/10.

Over three out of five (61%) gave Afan Forest Park a rating of 10/10 - this was a little lower than the all Wales average (68%).

This was reflected in the mean scores, with Afan Forest Park standing at 9.1 compared to the all Wales score of 9.4 – see Figure 9 below.

Figure 9: Q17. Likelihood of recommending the site as a place to visit



Results can be analysed further by using a Net Promoter Score (NPS), which divides customers into three types:

- Promoters (loyal enthusiasts) - score of 9-10
- Passives (satisfied but unenthusiastic) – score of 7-8
- Detractors (somewhat less satisfied) – score of 0-6.

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Afan Forest Park is 69, which is lower than the all Wales score of 79.

5.4 Favourite things about the site

Visitors to Afan Forest Park were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 9 overleaf and compared to the all Wales average.

The importance of cycling at Afan Forest Park came through strongly in the comments received. The aspect of the site liked by the highest proportion of visitors was the cycle trails and the opportunity to cycle (44%) - this was significantly higher than the all Wales average (17%).

Nearly as many mentioned the scenery, views and beauty (43%), although this was a lower proportion than that for all Welsh sites (57%). Similarly, whilst peace, tranquillity and relaxation were mentioned as a favourite at Afan Forest Park by 30%, this was lower than the all Wales average (51%).

The walks, paths and trails at Afan Forest Park were also mentioned by 30%, whilst a fifth talked about exercise and keeping fit (21%), and the site being close to home and convenient (20%) – see Table 9 overleaf for more details of the aspects of the site most liked by visitors.

Table 9: Q9 – Favourite things about the site

Activities	Afan Forest Park 2013 %	All Wales 2013 %
Cycle trails / opportunity to cycle	44	17
Scenery / views / beautiful	43	57
Peace / tranquillity / relaxation	30	51
Walks / paths / trails	30	38
Exercise / keeping fit	21	15
Close to home / convenient	20	15
Fresh air / being outside	16	16
Good on-site facilities	16	9
Safe environment	12	8
Clean / well looked after	11	9
Been before / wanted to come again	11	7
Activities for the children	10	6
Opportunity to spend time with family / friends	10	5
Plenty / cheap / good parking	7	5
Lots to see and do	5	3
Cost / value for money	5	3
Helpful / pleasant staff	4	1
Like forests / trees / variety of trees	3	14
Wildlife / bird watching	3	7
Café / restaurant	3	1
Well signposted / good maps / info	3	1
Remote / away from traffic / no cars	3	1
Good accessibility	2	1
Good toilets	2	1

Base: All visitors – Afan Forest Park 2013 (190); All Wales 2013 (1,114)

There were some differences observed between different sub-groups of the sample:

Favourite thing - cycle trails / opportunity to cycle

- Men (51%) vs. women (28%)
- ABC1 social groups (50%) vs. C2DE groups (37%)
- 16-34 year olds (60%) vs. 55+ year olds (8%)

Favourite thing – beautiful scenery and views

- 55+ year olds (57%) vs. 16-34 year olds (44%)
- Women (53%) vs. men (38%)

Favourite thing – peace, tranquillity and relaxation

- Women (43%) vs. men (25%)
- 55+ year olds (42%) vs. 16-34 year olds (27%).

5.5 Suggested improvements to the site

Visitors were asked if there was anything that would enhance their enjoyment of the site, and if anything interfered with their enjoyment of the site. Again, these questions were unprompted and visitors could mention more than one improvement or issue.

Turning firstly to what would enhance their enjoyment of the site; nearly a third of the visitors to Afan Forest Park could not think of anything that would add to their enjoyment, and only made positive comments (28%). This was below the all Wales average of 47%.

Most suggestions to improve the site were made by relatively small numbers of visitors, and Table 10 overleaf outlines those comments that were made by 2% or more.

The most mentioned suggestion was to have more trails, paths / cycle tracks at Afan Forest Park (15%).

Of the other suggested enhancements, improved signage and maps was mentioned by 9% and improved maintenance and better surfacing of paths and trails by 8%.

More dog poo bins were asked for by 7%, with more bins generally also requested (6%), and improved toilet /shower facilities also featured (5%) – Table 10 overleaf has a comprehensive listing.

Table 10: Q10 – What would enhance enjoyment of site – main mentions

	Afan Forest Park 2013 %	All Wales 2013 %
Nothing / general positive comments	28	47
More trails / paths / cycle tracks	15	5
Improve signage / better signs / maps	9	7
Improve maintenance of paths / trails / better surfacing	8	3
More dog poo bins	7	5
More bins / litter bins / recycling bins	6	5
Improve toilets / more toilets / shower facilities	5	8
Cyclists to have more regard for walkers	4	1
More activities for the children / more play areas	3	2
Better weather / more sunshine	3	2
More picnic areas / BBQ / picnic tables	2	2
Provide café / catering	2	5
Improve café / catering	2	1
More seating	2	2
Drinking water taps	2	1

Base: All visitors – Afan Forest Park 2013 (190); All Wales 2013 (1,114)

When asked if there was anything that interfered with their enjoyment of the site, nearly two thirds of visitors to Afan Forest Park reported that nothing had interfered with their enjoyment (63%). This was somewhat lower than the all Wales figure (79%), although comments relating to interference with their enjoyment were made by small proportions of respondents.

Problems getting around the site and the need for better signage were both mentioned by 6%, whilst poor site maintenance was an issue for 5% of visitors – Table 11 below details those comments made by 2% of the sample or more.

Table 11: Q11 – What interfered with enjoyment of site – main mentions

	Afan Forest Park 2013 %	All Wales 2013 %
Nothing	63	79
Problems getting around the site (trails closed, no disabled access)	6	2
Signs unclear / need better signs / more maps	6	3
Poor maintenance of site (paths, fences, waterways)	5	2
Dog mess on paths / in play area	4	2
Need more dog poo bins	4	2
Too many cyclists / cyclists cutting up walkers	3	1
Wet / raining / poor weather	2	2

Base: All visitors – Afan Forest Park 2013 (190); All Wales 2013 (1,114)

6. Site facilities

6.1 Importance of site facilities

Visitors were presented with a list of facilities available at Afan Forest Park and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

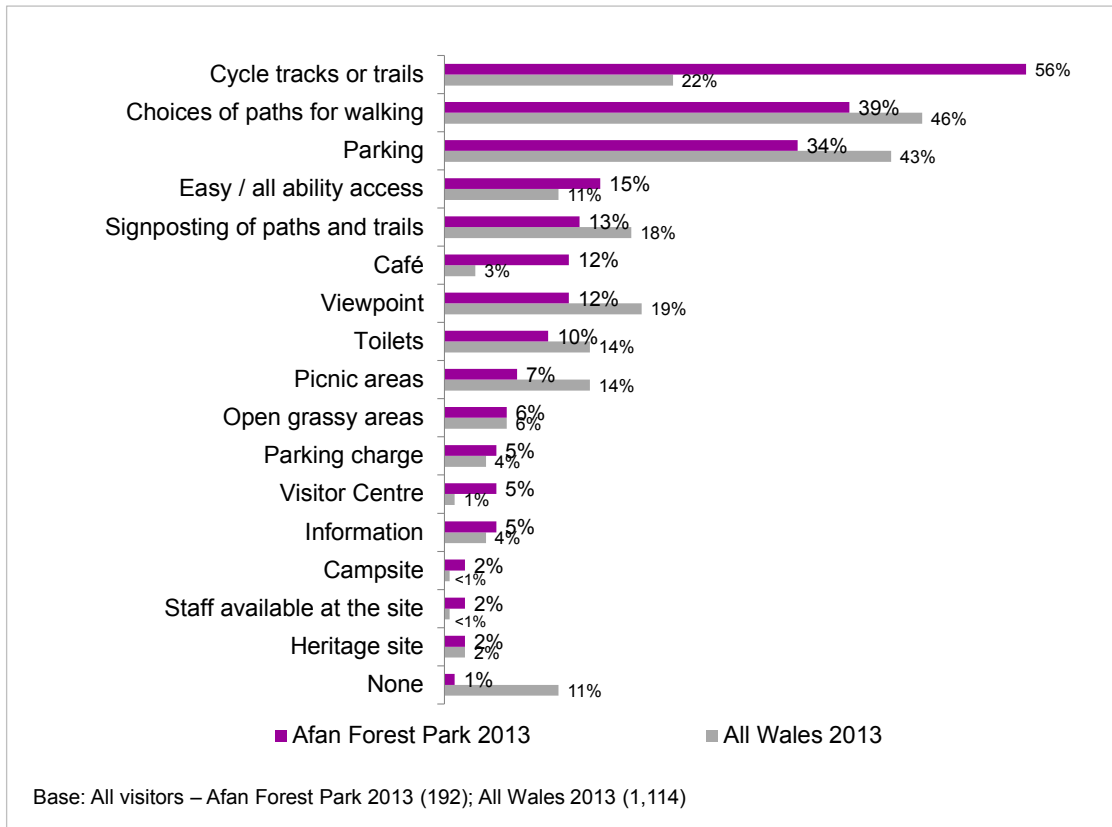
Reflecting visitors' favourite things about the site, cycle tracks or trails were mentioned by over half of the visitors to Afan Forest Park (56%). This was considerably higher than the all Wales figure (22%).

A choice of paths for walking was important to around two fifths of visitors (39%), in line with the all Wales figure (43%).

Parking was also important to over a third of the visitors to Afan Forest Park (34%), somewhat less than the all Wales average of 42%.

Ease of access was important to around one in six (15%), as was signposting of paths and trails (13%). Visitors also mentioned a café and Viewpoint (12% for each), whilst 10% felt that toilets were important to their decision to visit – see Figure 10 overleaf for more details.

Figure 10: Q14. Importance of different facilities in deciding to visit the site



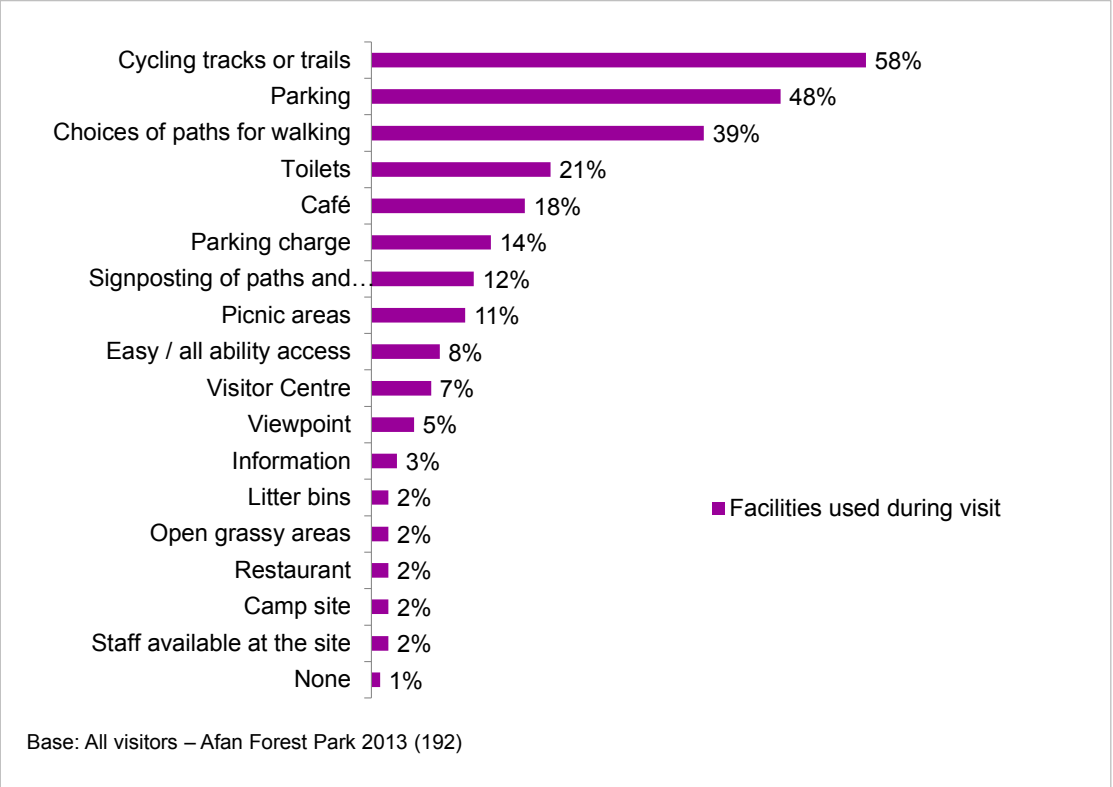
6.2 Facilities used

Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The facilities used reflected to a large extent visitors' views of the importance of facilities. Cycling tracks or trails were used by almost three out of five of the visitors to Afan Forest Park (58%), whilst parking was used by almost half (48%).

Around two out of five used paths for walking (39%), whilst toilets and café facilities were used by 21% and 18% respectively – see Figure 11 below.

Figure 11: Q15a. Facilities used at Afan Forest Park 2013



There were some differences observed between different sub-groups of the sample:

Used cycle tracks or trails:

- Men (68%) vs. women (36%)
- 16-34 year olds (78%) vs. 35-54 year olds (74%) and 55+ year olds (19%)
- ABC1 social groups (67%) vs. C2DE groups (48%)

Used a choice of paths for walking:

- Women (53%) vs. men (31%)
- 55+ year olds (66%) vs. 35-54 year olds (24%)
- Adults only (41%) vs. adults with children (29%).

6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by more than 10% of the overall sample at Afan Forest Park have been detailed in Figure 12 overleaf.

Ratings of most of the facilities at Afan Forest Park were very positive. A large majority gave a positive rating of either 'excellent', 'very good' or 'good'.

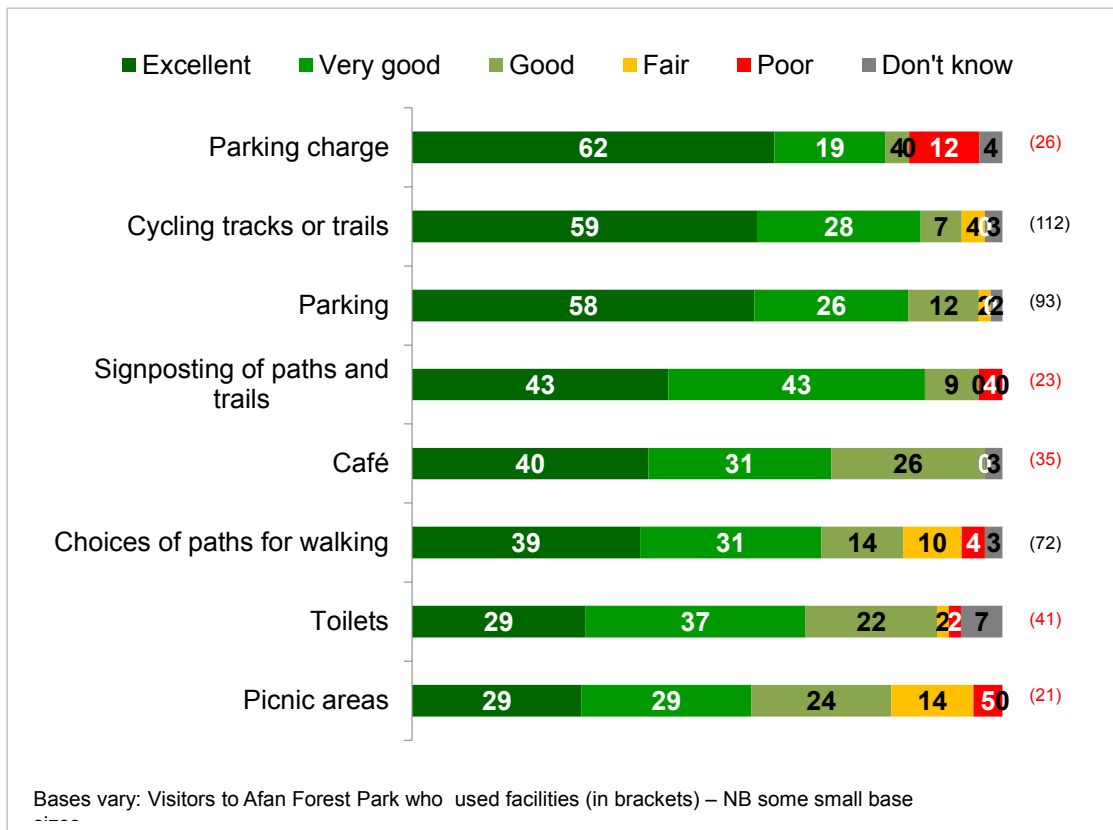
The facility that received the highest rating was the parking charges. Over three out of five rated these as 'excellent' (62%), whilst a further one in five (19%) rated them as 'very good'. There was some polarisation of opinion, as 12% also rated parking charges as 'poor' (although this was from a relatively small base of 26 respondents).

Cycling tracks at Afan Forest Park were also rated very highly. Three fifths of users rated them as 'excellent' (59%) and the majority of the remainder as 'very good' (28%).

Parking was also highly rated with 58% giving an 'excellent' score and 26% saying that the parking was 'very good'.

Even the facilities that received the least positive ratings such as the toilets and picnic areas had over half of those who used them rating them as 'excellent' or 'very good' (66% and 58% respectively) – see Figure 12 overleaf for more details of the ratings given to each facility.

Figure 12: Q15b. Rating of Afan Forest Park site facilities (where used) 2013



7. Sources of information used to plan visit

Visitors were asked where they found out about Afan Forest Park as a place to visit. This question was prompted and visitors could mention as many sources of information as were applicable – those given by more than 2% of visitors are outlined below.

Amongst first time visitors to Afan Forest Park, around a third heard about it through word of mouth or via the internet (32% for each). Whilst word of mouth was roughly in line with the all Wales figure (32% Afan Forest Park vs. all Wales 39%) those finding out about Afan Forest Park via the internet was considerably higher (32% Afan Forest Park vs. all Wales 13%).

Amongst repeat visitors to Afan Forest Park, nearly four out of five said that they had been there before or had always known about it (79%). This was similar to the all Wales figure (75%) – see Table 13 below for more details.

Table 13: Q8 – How found out about the site as a place to visit

	First Time Visitors		Repeat Visitors	
	Afan Forest Park 2013 %	All Wales 2013 %	Afan Forest Park 2013 %	All Wales 2013 %
Word of mouth	32	39	18	19
Google / internet	32	13	3	2
Always known about it / been here before	11	13	79	75
Sporting magazines	8		1	
Just passing / en route	5	11	3	3
Leaflet	5	4	2	2
Mountain Biking Wales website	5	1	2	1
Road signs	5	4	1	1
Forestry Commission website	5	2	1	1
Cognition website	3	1	1	<1
Tourist Board	3	2	-	<1
Natural Resources Wales website	3	1	-	-

Bases vary: First time vs. repeat visitors

8. Visiting other areas and attractions

8.1 Visiting other attractions or towns

Visitors to Afan Forest Park were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: most visitors (87%) had visited at least one.

The most visited attraction / town, with nearly half of those who visited Afan Forest Park also visiting, was Neath (47%). The next most popular attractions / towns were Sarn Park Retail Outlet (45%) and Aberavon (43%).

Two fifths of Afan Forest Park visitors also went to Glyncoerrwg Visitor Centre, Margam Park and Porthcawl Town and Beach (41%, 40% and 40% respectively) – see Table 14 below for more details.

Table 14: Other attractions or areas visited in the last 12 months

Attractions / Areas	Afan Forest Park 2013 %
Neath	47
Sarn Park Retail Outlet	45
Aberavon	43
Glyncoerrwg Visitor Centre	41
Margam Park	40
Porthcawl Town and Beach	40
Bridgend	32
Kenfig Burrows Nature Reserve	21
Merthyr Tydfil	19
Aberdulais Falls	16
Merthyr Mawr Nature Reserve	14
Margam Sands	6
None of these	13
Don't know	7

Base: All visitors – Afan Forest Park 2013 (190)

8.2 Awareness of Cognation

Visitors to Afan Forest Park were asked if they were aware of the Cognation mountain bike trails project in South Wales; roughly two in five said that they were (41%), although a similar proportion claimed to not be aware of the project (44%). One in six (15%) were not sure.


Awareness was much higher amongst males than females (47% cf. 26%); age, social class and group composition had little effect on levels of awareness.

Day trippers had higher levels of awareness of the project compared to those staying in the area (42% cf. 34%), and interestingly, those visitors coming from England were slightly more likely to have heard of Cognation (46%) compared to those living in Wales (42%).

Perhaps not surprisingly, awareness was higher than average amongst those people who had come to the site for cycling activities (49%), especially amongst those visitors who had cycled or mountain biked off trails and tracks (58%).

Appendix I

Questionnaire

 2 Museum Place, Cardiff, CF10 3BG	<u>B01326-1</u> <u>NRW / FCE</u> <u>Quality of Visitor Experience</u> <u>FINAL questionnaire</u> AFAN (FOREST PARK & RHYSLYN)	FOR OFFICE USE ONLY		INTERVIEWER RECORD WEATHER CONDITIONS (3-6m) CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____
	Case No.	Point (1-2)		

APPROACH ADULTS AGED 16+ - READ OUT

Hello, my name is of Beaufort Research. We are conducting some market research in this area on behalf of Natural Resources Wales to find out how this site is being used, and your views on the site and the facilities it offers. Your feedback will help to improve the quality of the visitor experience at this site and ensure that managed woodlands such as this are welcoming places to be.

Reassure if necessary: Beaufort is an independent market research company and we are not selling anything.

Can you spare just a few minutes to answer some questions? The interview should only take around 10 minutes to complete and all of your responses will be treated with the strictest confidence, and will only be reported in combination with the answers of other visitors.

S1 Have you come to the end of your visit, or are you about to come to the end of your visit here?

- Yes → **CONTINUE**
No → **THANK AND CLOSE**

WALES ONLY

S2 Do you speak Welsh? IF YES Is that.....?

- Yes – fluently 1
Yes – but not fluently 2
No 3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

S3 We can conduct this interview in English or in Welsh - which would you prefer?

- English 1
Welsh 2

ASK ALL

Q1 Can I just check how many people there are in total in your group?

WRITE IN NUMBER FOR EACH GROUP – IF NONE RECORD Ø

- Adults aged 16+ (including respondent) _____ (9-10)
Children aged 0-5 years _____ (11-12)
Children aged 6-10 years _____ (13-14)
Children aged 11-15 years _____ (15-16)

SHOWCARD A

Q2 Which of the following best describes your trip today
SINGLE CODE

- A day trip of less than 3 hours away from home 1
A day trip of more than 3 hours away from home 2
A visit that includes an overnight stay 3
Part of a longer holiday / visit 4
Don't know 5

SHOWCARD B

Q3 How often, on average do you come to this site?

SINGLE CODE

1 st visit	Every day	4-6 x per week	1-3 x per week	1-3 x per month	4-6 x per year	1-3 x per year	Less often	DK
1	2	3	4 5		6	7 8		9

(20)

SHOWCARD C

Q4a Which of these activities have you personally taken part in during your visit here today?

RECORD IN COLUMN A - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

Q4b And which of these activities have other members of your group taken part in during your visit here today?

RECORD IN COLUMN B - CODE ALL MENTIONED

ASK ALL - SHOWCARD C AGAIN

Q5 And which of these activities are you (**IF PART OF GROUP:** or other members of your group) planning to take part in during your visit here today?

RECORD IN COLUMN C - CODE ALL MENTIONED

ACTIVITY		Column A Q4a (21-24m)	Column B Q4b (29-32m)	Column C Q5 (37-40m)
1	* Cycling on forest roads, tracks or trails	1	1	1
2	* Cycling / mountain biking off trails or tracks	2	2	2
3	* Dog walking	3	3	3
4	* Walking on a sign-posted trail	4	4	4
5	* Walking but not following sign posts	5	5	5
6	* Orienteering	6	6	6
7	Using the café / restaurant / other catering	7	7	7
8	Using the visitor centre / shop	8	8	8
9	Using the play area	9	9	9
10	* Running / jogging	A	A	A
11	Nature / natural history visit	B	B	B
12	Bird watching	C	C	C
13	Photography	D	D	D
14	Motor sports	E	E	E
15	Educational visit	F	F	F
16	* Horse riding / pony trekking	G	G	G
17	Picnic	H	H	H
18	Barbeque	I	I I	
19	Seeing something in the forest	J	J	J
20	Organised event / trip	K	K	K
21	Admiring the views	L	L	L
22	Fishing	M	M M	
23	Meeting / conference	N	N	N
24	Camping	O	O O	
		(25-28m)	(33-36m)	(41-44m)
25	Go Ape!	A	A	A
26	A trim trail / exercise trail	B	B	B
27	A Forest Drive	C	C	C
28	Other (please specify)	X	X	X
	None of these	M	M	M

ASK ALL

SHOWCARD D

Q6 Approximately how long have you spent here today in total?
SINGLE CODE – RECORD IN 1ST ROW OF GRID BELOW

Q7 - ONLY ASK FOR ACTIVITIES THAT HAVE BEEN CODED AT Q4a (COLUMN A)

SHOWCARD D AGAIN

Q7 And approximately how long have you spent here today.....?
SINGLE CODE

	0-15 mins	16-30 mins	31-60 mins	1-2 hours	2-3 hours	3-5 hours	5+ hours	DK	
Q6 – TOTAL HOURS SPENT	1	2	3	4 5 6			7	8	(50)
Q7 - READ OUT IF CODED AT Q4a									
Cycling on forest roads, tracks or trails	1	2	3	4 5 6			7	8	(51)
Cycling / mountain biking off trails or tracks	1	2	3	4 5 6			7	8	(52)
Dog walking	1	2	3	4 5 6			7	8	(53)
Walking on a sign-posted trail	1	2	3	4 5 6			7	8	(54)
Walking but not following sign posts	1	2	3	4 5 6			7	8	(55)
Orienteering	1	2	3	4 5 6			7	8	(56)
Running / jogging	1	2	3	4 5 6			7	8	(57)
Horse riding / pony trekking	1	2	3	4 5 6			7	8	(58)

ASK ALL

SHOWCARD E

Q8 How or where did you find out about this site as a place to visit?
CODE ALL MENTIONED

(59-62m)

Always known about it	1							
Been here before	2							
Word of mouth							3	
Library							4	
Local newspaper	5							
National newspaper	6							
Leaflet	7							
Tourist Board	8							
Road signs	9							
Just passing / en route			A					
Map							B	
Smartphone app		C						
Facebook		D						
Twitter							E	
Forestry Commission website				F				
Natural Resources Wales website				G				
Google		H						
Other website (please specify) _____							X	
Other (please specify) _____							X	
								(63-66m)
Don't know / can't remember			M					

Q9	What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED	(70-73m)
	Peace / tranquillity / relaxation 1 Scenery / views / beautiful 2 Walks / paths / trails Cycle trails / freedom / opportunity to cycle ----- Wildlife / bird watching 5 Fresh air / being outside 6 Exercise / keeping fit 7 Activities / good for / something to do with the children 8 ----- Close to home / convenient 9 Opportunity to spend time with family / friends A Safe environment B Lots to see and / or do C ----- Like forests / trees / variety of trees D Good on-site facilities E Clean / well looked-after F The weather G ----- Been before / wanted to come again H Helpful / pleasant staff I Plenty / cheap / other reference to parking J Cost / value for money K ----- Other (please specify) _____ Nothing Don't know	3 4 ----- 5 ----- 8 ----- A ----- C ----- D ----- E ----- F ----- G ----- H ----- I J ----- K ----- X (74-77m) L M
Q10	What, if anything, would enhance your enjoyment of this site? PROBE Anything else? RECORD VERBATIM IF MENTIONS WEATHER, PROBE FOR MORE DETAILS	(78-81m)
	_____ _____ _____ Nothing Don't know	L M
Q11	What, if anything, interfered with your enjoyment of this site today? PROBE Anything else? RECORD VERBATIM IF MENTIONS WEATHER, PROBE FOR MORE DETAILS	(82-85m)
	_____ _____ _____ Nothing Don't know	L M

SHOWCARD F

Q12 How would you rate the site in terms of how safe and welcoming it feels?
SINGLE CODE

- Excellent
- Very good 2
- Good 3
- Fair
- Poor
- Very poor 6
- Don't know / not sure 7

ONLY ASK Q13 IF CODED 1-6 AT Q12

Q13 What are the reasons for your rating? **PROBE** Anything else?
RECORD VERBATIM

Don't know

ASK ALL

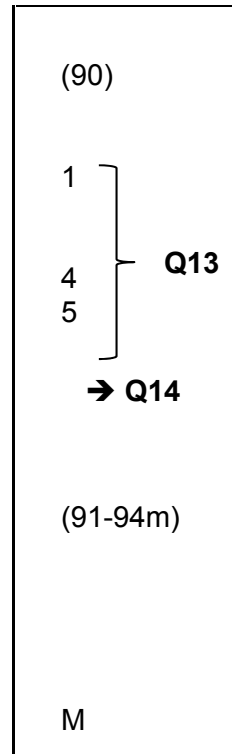
SHOWCARD G

Q14 Looking at this card, which of these aspects were important to your decision to visit today? **PROBE** Any others?
CODE ALL MENTIONED

95-98m		
1	Access to the Beach	1
2	Animal Puzzle Trail	2
3	Arboretum	3
4	Art or Sculpture in the Forest	4
5	Baby Changing Facilities	5
6	BBQ	6
7	Beamer Trampler - motorised wheelchair hire	7
8	Bike Skills Area	8
9	Bike Wash	9
10	Bird Hide	A
11	Bus Links	B
12	Café	C
13	Camp Site	D
14	Caravan Site	E
15	Centre for Contemporary Art and the Natural World	F
16	Choices of Paths for Walking	G
17	Community Discovery Centre	H
18	Community Orchard	I
19	Conference Facilities	J
20	Craft Barns	K
21	Cycle Hire	L
22	Cycle Shop	M
23	Cycling Tracks or Trails	N

99-102m		
24	Disabled Facilities	1
25	Dog Waste Bins	2
26	Easy / All Ability Access	3
27	Educational	4
28	Events	5
29	Fenced Dog Training Area	6
30	Fishing	7
31	Forest Classroom	8
32	Forest Drive	9
33	Forest Holidays	A
34	Forest Shop	B
35	Go Ape!	C
36	Great Oak Hall	D
37	Heritage Site	E
38	Horse Riding	F
39	Information	G
40	Kite Feeding	H
41	Litter Bins	I
42	Motorsports	J
43	Museum	K
44	National Pinetum	L
45	Nature Reserve	M
46	Open grassy areas	N

103-106m		
47	Orienteering	1
48	Outdoor Arena	2
49	Parking	3
50	Parking charge	4
51	Picnic areas	5
52	Plant Centre	6
53	Play areas and equipment	7
54	Railway	8
55	Restaurant	9
56	Running Trails	A
57	Sensory Garden	B
58	Sign posting of paths and trails	C
59	Staff available at the site	D
60	Toilets	E
61	Trim Trail / Exercise area	F
62	Viewpoint	G
63	Visitor Centre	H
64	Watersports	I
65	Wildlife Activities	J
66	Wildlife Hide	K
67	Youth Shelters	L



Other (please specify) _____ (107-110m)

SHOWCARD G AGAIN

Q15a Which aspects of the site have you used during your visit today?

RECORD IN COLUMN A – CODE ALL MENTIONED

SHOWCARD H

Q15b Now I would like you to rate each of the aspects of the site that you have used during today's visit. So how would you rate....?

ONLY ASK FOR ASPECTS THAT HAVE BEEN CODED AT Q15a – IF 'NONE' OR 'D/K' AT Q15a, SKIP TO Q16, DO NOT ASK Q15b

ASPECTS USED		Q15a COL. A	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A								
		CIRCLE IF USED	Excellent	Very good	Good	Fair	Poor	Very poor	DK		
		(120-123m)									
1	Access to the Beach	1	1	2	3	4 5 6			7	(140)	
2	Animal Puzzle Trail	2	1	2	3	4 5 6			7	(141)	
3	Arboretum	3	1	2	3	4 5 6			7	(142)	
4	Art or Sculpture in the Forest	4	1	2	3	4 5 6			7	(143)	
5	Baby Changing Facilities	5	1	2	3	4 5 6			7	(144)	
6	BBQ	6	1	2	3	4 5 6			7	(145)	
7	Beamer Tramper - motorised wheelchair hire	7	1	2	3	4 5 6			7	(146)	
8	Bike Skills Area	8	1	2	3	4 5 6			7	(147)	
9	Bike Wash	9	1	2	3	4 5 6			7	(148)	
10	Bird Hide	A	1	2	3	4 5 6			7	(149)	
11	Bus Links	B	1	2	3	4 5 6			7	(150)	
12	Café	C	1	2	3	4 5 6			7	(151)	
13	Camp Site	D	1	2	3	4 5 6			7	(152)	
14	Caravan Site	E	1	2	3	4 5 6			7	(153)	
15	Centre for Contemporary Art and the Natural World	F	1	2	3	4 5 6			7	(154)	
16	Choices of Paths for Walking	G	1	2	3	4 5 6			7	(155)	
17	Community Discovery Centre	H	1	2	3	4 5 6			7	(156)	
18	Community Orchard	I	1	2	3	4 5 6			7	(157)	
19	Conference Facilities	J	1	2	3	4 5 6			7	(158)	
20	Craft Barns	K	1	2	3	4 5 6			7	(159)	
21	Cycle Hire	L	1	2	3	4 5 6			7	(160)	
22	Cycle Shop	M	1	2	3	4 5 6			7	(161)	
23	Cycling Tracks or Trails	N	1	2	3	4 5 6			7	(162)	
24	Disabled Facilities	O	1	2	3	4 5 6			7	(163)	
		(124-127m)									
25	Dog Waste Bins	1	1	2	3	4 5 6			7	(164)	
26	Easy / All Ability Access	2	1	2	3	4 5 6			7	(165)	
27	Educational	3	1	2	3	4 5 6			7	(166)	
28	Events	4	1	2	3	4 5 6			7	(167)	
29	Fenced Dog Training Area	5	1	2	3	4 5 6			7	(168)	
30	Fishing	6	1	2	3	4 5 6			7	(169)	
31	Forest Classroom	7	1	2	3	4 5 6			7	(170)	
32	Forest Drive	8	1	2	3	4 5 6			7	(171)	
33	Forest Holidays	9	1	2	3	4 5 6			7	(172)	
34	Forest Shop	A	1	2	3	4 5 6			7	(173)	
35	Go Ape!	B	1	2	3	4 5 6			7	(174)	
36	Great Oak Hall	C	1	2	3	4 5 6			7	(175)	
37	Heritage Site	D	1	2	3	4 5 6			7	(176)	
38	Horse Riding	E	1	2	3	4 5 6			7	(177)	

LIST CONTINUED OVERLEAF

39	Information	F	1	2	3	4 5 6			7	(178)
40	Kite Feeding	G	1	2	3	4 5 6			7	(179)
41	Litter Bins	H	1	2	3	4 5 6			7	(180)
42	Motorsports	I	1	2	3	4 5 6			7	(181)
43	Museum	J	1	2	3	4 5 6			7	(182)
44	National Pinetum	K	1	2	3	4 5 6			7	(183)
45	Nature Reserve	L	1	2	3	4 5 6			7	(184)
46	Open grassy areas	M	1	2	3	4 5 6			7	(185)
47	Orienteering	N	1	2	3	4 5 6			7	(186)
48	Outdoor Arena	O	1	2	3	4 5 6			7	(187)
		(128-131m)								
49	Parking	1	1	2	3	4 5 6			7	(188)
50	Parking charge	2	1	2	3	4 5 6			7	(189)
51	Picnic areas	3	1	2	3	4 5 6			7	(190)
52	Plant Centre	4	1	2	3	4 5 6			7	(191)
53	Play areas and equipment	5	1	2	3	4 5 6			7	(192)
54	Railway	6	1	2	3	4 5 6			7	(193)
55	Restaurant	7	1	2	3	4 5 6			7	(194)
56	Running Trails	8	1	2	3	4 5 6			7	(195)
57	Sensory Garden	9	1	2	3	4 5 6			7	(196)
58	Sign posting of paths and trails	A	1	2	3	4 5 6			7	(197)
59	Staff available at the site	B	1	2	3	4 5 6			7	(198)
60	Toilets	C	1	2	3	4 5 6			7	(199)
61	Trim Trail / Exercise area	D	1	2	3	4 5 6			7	(200)
62	Viewpoint	E	1	2	3	4 5 6			7	(201)
63	Visitor Centre	F	1	2	3	4 5 6			7	(202)
64	Watersports	G	1	2	3	4 5 6			7	(203)
65	Wildlife Activities	H	1	2	3	4 5 6			7	(204)
66	Wildlife Hide	I	1	2	3	4 5 6			7	(205)
67	Youth Shelters	J	1	2	3	4 5 6			7	(206)
	None of these	M								
	Don't know	N								

ASK ALL

SHOWCARD H AGAIN

Q16 Overall, how would you rate this site as a place to visit?
SINGLE CODE

Excellent
 Very good 2
 Good 3
 Fair
 Poor
 Very poor 6
 Don't know / not sure 7

(210)

1
 4
 5

Q17 Using a scale of 0 – 10, where 0 means 'Not at all likely' and 10 means 'Extremely likely', how likely is it that you would recommend this site as a place to visit to a friend or relative?
SINGLE CODE

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

(211)

ONLY ASK Q18a IF MORE THAN ONE PERSON IN GROUP

SHOWCARD I

Q18a Thinking about the whole of the group you are with today, how much do you think the whole group are likely to spend in the local area on the following things as a result of your visit today?
WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE RECORD 0

Accommodation, including food and drink purchased there _____
 Food and drink purchased outside any accommodation _____
 Admissions fees to attractions _____
 Parking _____
 Non-routine shopping (e.g. buying souvenirs) _____
 Transport including petrol, taxis, public transport etc. _____
 Hiring equipment such as boats, bikes or horses _____
 Other miscellaneous items _____

(212-217)
 (218-223)
 (224-229)
 (230-235)
 (236-241)
 (242-247)
 (248-253)
 (254-259)

INSTRUCTION - ONLY ASK Q18b RESPONDENT IS ALONE

SHOWCARD I

Q18b How much do you expect to spend in the local area on the following things as a result of your visit today?
WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE RECORD 0

Accommodation, including food and drink purchased there _____
 Food and drink purchased outside any accommodation _____
 Admissions fees to attractions _____
 Parking _____
 Non-routine shopping (e.g. buying souvenirs) _____
 Transport including petrol, taxis, public transport etc. _____
 Hiring equipment such as boats, bikes or horses _____
 Other miscellaneous items _____

NOW GO TO Q19

(261-266)
 (267-272)
 (273-278)
 (279-284)
 (285-290)
 (291-296)
 (297-302)
 (303-308)

SHOWCARD J

Q19 Looking at this card, can you tell me which, if any, of these places you have visited in the last 12 months?

(335-338m)

CODE ALL MENTIONED

Neath Town	1	
Merthyr Tydfil town		2
Margam Park		3
Margam Sands		4
Aberavon		5
Merthyr Mawr Nature Reserve	6	
Kenfig Burrows Nature Reserve	7	
Bridgend Town	8	
Sarn Park Outlet Village, Bridgend (McArthur Glen)		9
Porthcawl Town / Beach	A	
Aberdulais Falls	B	
Glyncorrwg Visitor Centre (in Afan Forest Park)		C
None of these	L	
Don't know / can't remember	M	

For office use only: 320-331 and 601, 602 for England sites

SHOWCARD K

Q20a Where are you staying during your visit? **IF STAYED IN MORE THAN ONE PLACE**

Where are you staying currently?

SINGLE CODE ONLY

Within a 6 mile radius of Afan Forest Park
Please state the name of the nearest town

X

(339-340)

Within a 10 mile radius of Afan Forest Park
Please state the name of the nearest town

X

(341-342)

Elsewhere - outside 10 mile radius
Please state the name of the nearest town

X

(343-344)

Have come from home / live nearby

98

Don't know / can't remember

99

Q20b Are you aware of the Cognation mountain bike trails project in South Wales?

(345)

Yes

1

No

2

Not sure

3

ASK ALL

READ OUT – Finally, I'd like to ask some questions for analytical purposes.

Q21 INTERVIEWER RECORD GENDER (603)

- Male
- Female

1
2

JQ22 Which of the following age bands do you fall into?

(604)

- 16-24 years
- 25-34 years
- 35-44 years
- 45-54 years
- 55-64 years
- 65+ years

1
2
3
4
5
6

Refused

7

SHOWCARD L

Q23 Which of these best describes your employment status right now?
SINGLE CODE

(605)

- Employee in full time job (30 hours plus a week) 1
- Employee in part time job (under 30 hours per week) 2
- Self-employed full or part time 3
- On a government supported training programme 4
- Full time education at school, college or university 5
- Unemployed and available for work 6
- Permanently sick / disabled 7
- Wholly retired from work 8
- Looking after the home 9
- Other (please specify) _____

Refused

Z

Q24 Can you tell me the occupation of the Chief Income Earner within the household?
(The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. This person can be of either sex.)

(606)

NOTE: IF CHIEF INCOME EARNER IS RETIRED OR REGISTERED UNEMPLOYED, ASK FOR PREVIOUS OCCUPATION

Job title _____

Position / Grade _____

- AB
- C1
- C2
- DE

1
2
3
4

Refused

5

Q25 Do you have any children aged 15 or under living in your household? (607)

Yes 1
 No 2
 Refused 3

Q26 Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months? (608)
INCLUDES PROBLEMS RELATED TO OLD AGE

Yes – limited a lot 1
 Yes – limited a little 2
 No 3
 Refused 4

SHOWCARD M

Q27 Which of these best describes your ethnic origin? (609)
SINGLE CODE

White British 1
 White Welsh 2
 White Irish 3
 White East European 4
 White other European 5
 Any other White background (please specify) _____ E

Caribbean 6
 African 7
 Any other Black background (please specify) _____ F

Indian 8
 Pakistani 9
 Bangladeshi A
 Any other Asian background (please specify) _____ G

White and Black Caribbean B
 White and Black African C
 White and Asian D
 Any other Mixed background (please specify) _____ H

Chinese J
 Other (please specify) _____ I
 Refused Z

Q28 So we can map where visitors have come from, can I please have your postcode?
 Please be assured that this information will only be used for analysis purposes and will not be used to identify individuals.

ENSURE POSTCODE IS COLLECTED IN FULL WHERE POSSIBLE, OR AS MUCH OF POSTCODE AS RESPONDENT WILL PROVIDE

(610)	(611)	(612)	(613)	(614)	(615)	(616)

Overseas visitor (please specify country) _____ (617-618)

Respondent Name:							
Address:							
Telephone number:							
THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.							
<i>Interviewer Declaration:</i> I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:							
Signature				Date of interview:			
				(621)(622)(623)(624)			
WRITE IN YOUR INTERVIEWER NUMBER →				(625)	(626)	(627)	(628)
B01326-1	F.O.U (BACK CHECKS)		Accompanied	Yes 1	No 2	Supervisor signature	

Appendix II

Explanation of social class categories

Social-class groupings are based on the occupation of the Head of Household (i.e. the chief income earner within the household). The following definition outlines the groupings used and the types of occupation included in each:

AB

Professionals, senior managers, middle management of large organisation, top management of small businesses.

C1

Junior management, owners of small establishments and all other non-manual positions.

C2

Skilled manual workers, manual workers with responsibility for other people.

DE

Semi-skilled and unskilled manual workers, apprentices and trainees to skilled workers, those dependent on state benefits, casual workers and those without regular income.

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