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# Research Report

Quality of the Visitor  
Experience 2014

Alwen



Prepared for:  
Natural Resources Wales /  
Forestry Commission England

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## 1. Executive summary

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### 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 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 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 2011, interviews were conducted at 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

This report summarises the findings from the 133 visitor interviews conducted at Alwen in 2014. Throughout the report, comparisons have been made to the previous research conducted in 2011, and the all Wales average (aggregated data from all 7 sites surveyed in 2014).

### 1.2 Alwen

**Alwen Forest** is part of Hiraethog Forest. It has 1,500 hectares of upland coniferous forest which surrounds the highly scenic Alwen Reservoir. Recent forest operations have revealed tremendous views across the reservoir, uncovered hidden archaeology and led to resurgence of interest in this forgotten area. Its nearest town or village is Cerrigydrudion. Alwen Forest is home to the Alwen Trail, an easy-to-follow, waymarked, circular route around the Alwen Reservoir which created access for walker and cyclists to enjoy the Denbigh Moor. It is also home to the Alwen Dam.

As well as the trail and Dam, Alwen Forest has a wide variety of activities available to visitors; including walking, horse riding, peaceful fishing, cycling and wildlife activities such as sighting the Black Grouse and the Lapwing which are registered extinct.

### **1.3 Perceptions of the site**

Perceptions of Alwen as a place to visit were very positive. This was also the case across all Wales sites and was found in the previous study conducted in 2011. In fact nobody interviewed at Alwen in 2011 or 2014 gave a negative rating of the site.

Half (52%) rated the site as 'excellent', which is in line with the all Wales findings (55%) and higher than the previous study conducted at Alwen in 2011 (37%). A further two fifths (44%) gave the site a rating of 'very good' and 3% rated it as 'good'.

Similarly, ratings of how safe and welcoming Alwen was were also very positive. This was also the case across all Wales sites, and views were more positive in 2014 compared to 2011. Only a very small proportion gave a negative rating of the site in terms of it being safe and welcoming.

When asked whether they would be likely to recommend Alwen as a place to visit to a friend or relative (using a score of 0-10), scores for Alwen and all Wales sites generally were extremely positive. The average score for Alwen in 2014 was 9.5 out of 10, higher than both the 2011 score of 9.2 and the all Wales score of 9.4.

### **1.4 Strengths of the site**

Two favourite things about Alwen stood out. The most mentioned (by seven in ten) was 'scenery / views / beautiful' (71%), followed by 'peace / tranquillity / relaxation' (57%). A third (31%) mentioned 'walks / paths / trails' as favourite things, with one in five mentioning the fresh air / being outside (21%)

## 1.5 Areas for improvement

Nearly half of visitors to Alwen could not think of anything that would add to their enjoyment and only made positive comments (46%). This was identical to the all Wales average of 46%. The only prevailing aspects that needed attention was toilet facilities: 15% of visitors wanted to see these ungraded, or more toilets / showers / changing facilities around the site.

There were calls by small minorities for:

- More seating 8%
- More picnic areas / BBQ / picnic tables and chairs 8%
- More dog poo bins / remove dog poo 7%
- More bins / litter bins / recycling bins / less litter 5%
- Improve signage / more maps / better maps 5%
- Improve maintenance of paths / cycle trails / better surfacing 5%
- Better access / make more accessible 4%.

## 1.6 Visitor profile

The majority of visitors to Alwen had visited the site before (80%). This proportion was higher than the all Wales average of 71% who said they had been to their respective forest sites before.

Over half of visitors to Alwen travelled for more than three hours to reach the site and intended to stay for the day rather than overnight (56%).

The gender profile was slightly skewed towards more males than females (55% of visitors were men compared with 45% women). This was only marginally different from the all Wales figures (53% male and 47% female).

In terms of age, the Alwen visitors tended to be slightly older than all Wales visitors. Around two in five (39%) of Alwen visitors were aged 16-44 years, compared with 42% all Wales, whereas 62% were aged 45+ (57% all Wales). The profile for working status of visitors to Alwen was also in line with the all Wales data, with most working full-time (60% Alwen; 56% all Wales).

Alwen visitors tended more towards the C2DE socio-economic groups (34%) than the all Wales visitors (27%).

Just under three in ten (27%) of the Alwen visitors had children in the household, which is similar to the all Wales figure (34%).

## 2. Introduction

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### 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. NRW also manages a number of National Nature Reserves (NNRs) across Wales.

Each year in Wales, around 4 million visits are made to the woodland estate including 0.5 million to sites with visitor centres with a further 3 million visits made to NNRs. 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 and green-space can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming green space provides 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. 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 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 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 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

Table 1 below details the sites surveyed in 2014, 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
Bedgebury	236	Alwen (M)	133
Delamere	240	Bwlch y Nant yr Arian (H)	190
Forest of Dean	230	Clocaenog (M)	136
Hamsterley	234	Coed y Brenin (H)	205
High Lodge, Thetford Forest	246	Cors Caron (H)	176
Salcey	239	Crychan (M)	125
Whinlatter	229	Garwnant (H)	189
<b>TOTAL</b>	<b>1,654</b>	<b>TOTAL</b>	<b>1,154</b>

\* 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 ran from March to October 2014. At Alwen, interviewing took place between 29<sup>th</sup> March and 13<sup>th</sup> September, and a total of 136 interviews were conducted.

## **2.3 Report**

This report summarises the results of the interviews undertaken at Alwen in 2014, 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) and previous findings from the 2011 research (where applicable).

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

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#### 3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Alwen. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2014.

The profile of visitors to Alwen was largely in line with that of the visitors to all the Wales sites.

The gender profile was slightly skewed towards more males than females (55% of visitors were men compared with 45% women). This was only marginally different from the all Wales figures (53% male and 47% female).

In terms of age, the Alwen visitors tended to be slightly older than all Wales visitors. Around two in five (39%) of Alwen visitors were aged 16-44 years, compared with 42% all Wales, whereas 62% were aged 45+ (57% all Wales). The profile for working status of visitors to Alwen was more in line with the all Wales data, with most working full-time (60% Alwen; 56% all Wales).

Alwen visitors tended more towards the C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 34%) than the all Wales visitors (27%). However, on the whole most visitors to the site were ABC1 (professional, managers and non-manual positions = 66%).

Around a quarter (27%) of Alwen visitors had children in the household, which was slightly lower than the all Wales figure (34%).

The overwhelming majority of visitors to Alwen were White British / Welsh / Irish (95%), with only a small number of visitors describing their ethnicity as 'White other nationality' (3%) or 'Black / Asian / Mixed' (2%).

Just under a quarter of visitors to Alwen spoke Welsh (23%): 9% fluently and 14% non-fluently. This is in line with the all Wales average of 22% Welsh speakers (11% fluent, 11% non-fluent) – see Table 2 overleaf for more details.

**Table 2: Profile of visitors by key demographics 2014**

		Alwen %	All Wales %
<b>Gender</b>	Male	55	53
	Female	45	47
<b>Age</b>	16 - 24	5	3
	25 - 34	16	16
	35 – 44	18	23
	45 – 54	29	23
	55 – 64	16	17
	65+	17	17
	Refused	-	<1
<b>Social class</b>	AB	26	38
	C1	40	34
	C2	20	15
	DE	14	12
	Refused	-	1
<b>Working status</b>	Full-time employee (30+ hours per week)	60	56
	Part-time employee (<30 hours per week)	8	10
	Self-employed	8	7
	Full-time education	-	1
	Unemployed	3	1
	Permanently sick / disabled	2	2
	Retired	17	19
	Looking after home	2	2
	Other	-	<1
	Refused	2	1
<b>Limiting illness</b>	Yes – limited a lot	4	4
	Yes – limited a little	4	5
	No	91	90
	Refused	2	1
<b>Children in household</b>	Yes	27	34
	No	72	66
	Refused	1	<1
<b>Ethnicity</b>	White – British / Welsh / Irish	95	96
	White – Other	3	3
	Black / Asian / Mixed	2	1
	Refused	-	<1
<b>Welsh speaker</b>	Yes	23	22
	No	77	78

Base: All visitors – Alwen (133); All Wales (1,154)

### 3.2 Group profile

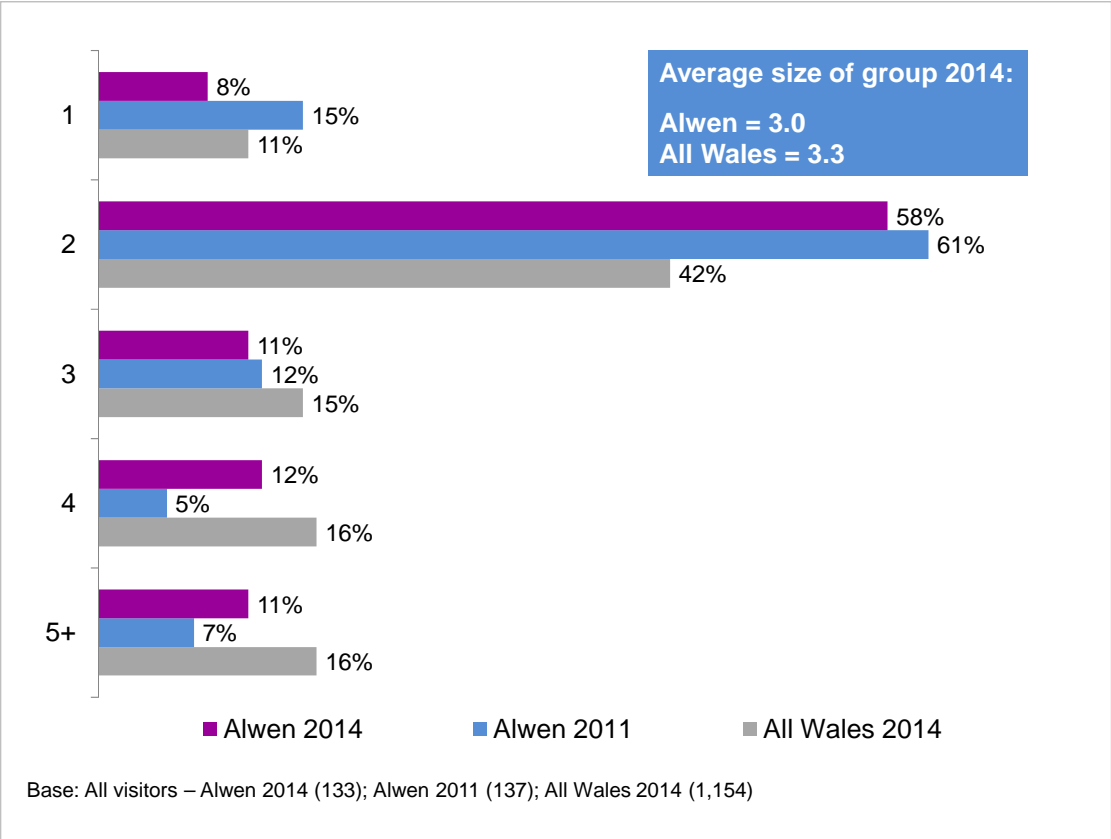
#### 3.2.1 Size of group

Group sizes were slightly smaller at Alwen (averaging 3.0 people), compared to the all Wales sample (which averaged 3.3 people).

The largest group by some margin (58%), was made up of two people. This was slightly lower than the previous Alwen research in 2011 (61%) but higher than the all Wales average (42%).

In 2011, visitor groups tended to be smaller: 15% of visitors were at the site alone (compared to 8% in 2014) and 12% of the visitor groups from the previous research contained more than 4 people (compared to 23% in the 2014 research).

Figure 1: Q1. Total size of the group

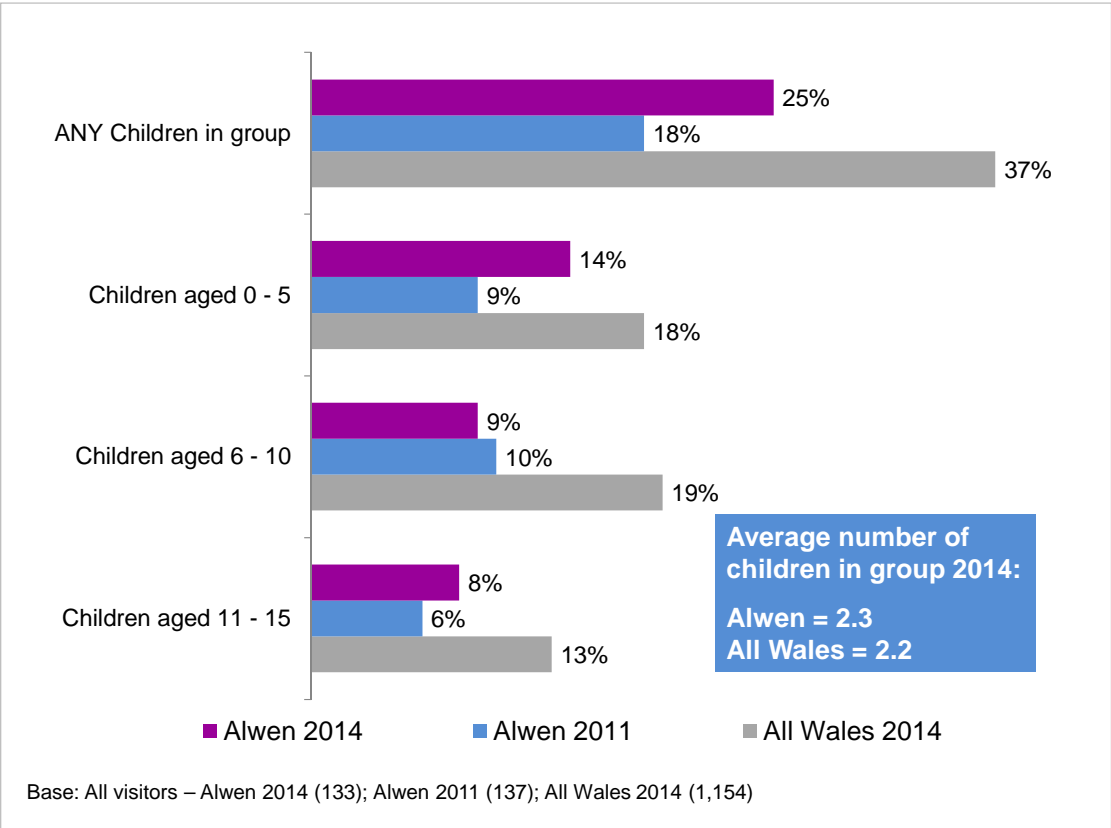


### 3.2.2 Composition of group

A quarter of the groups who visited Alwen contained children (25%). This was lower than the all Wales figure (37%) but higher than the comparative Alwen study conducted in 2011 (18%). The average number of children per group visiting Alwen in 2014 was consistent with the all Wales average (mean of 2.3 children per group at Alwen compared with 2.2 all Wales).

Children visiting Alwen tended to be aged 0-5 years (14%), with fewer children aged older than this (compared to the all Wales average). There were more younger children visiting Alwen in 2014 compared to 2011 (9%): for other age groups the data for both years was more comparable.

**Figure 2: Q1. Composition of group**



## 4. Profile of visit

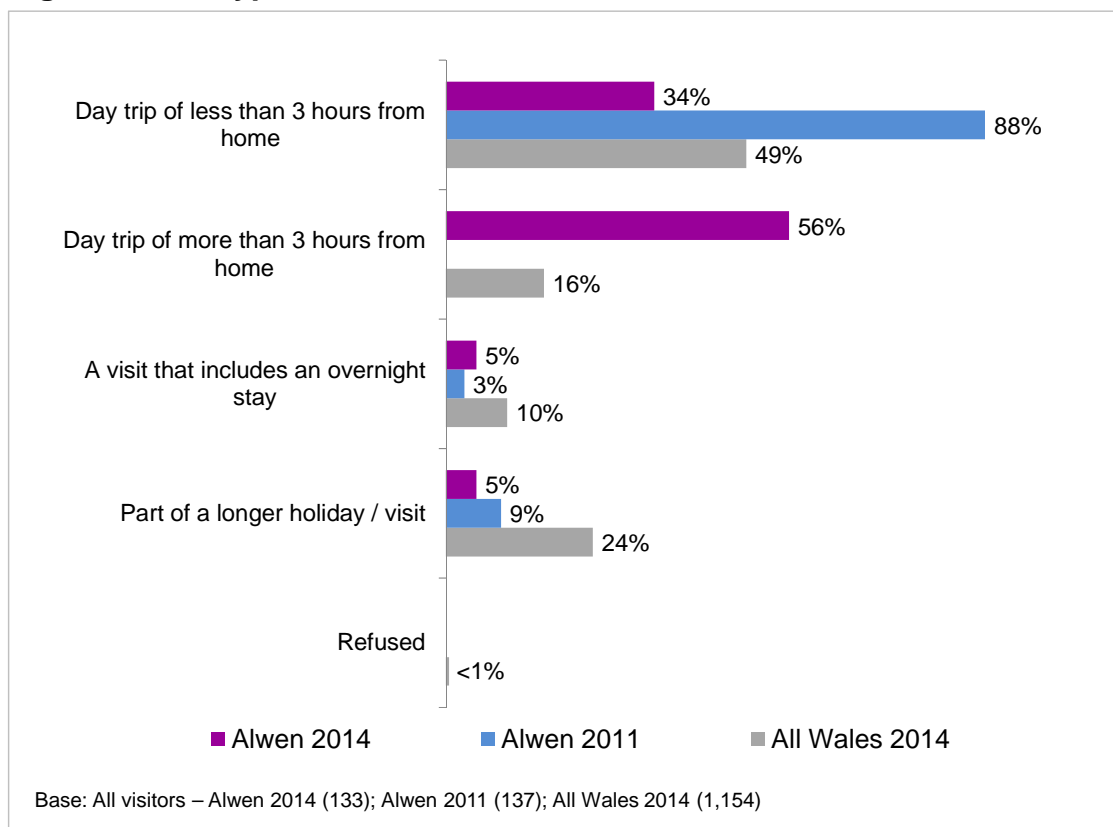
### 4.1 Type of visit

Over half of visitors to Alwen travelled for more than three hours to reach the site and intended to stay for the day rather than overnight (56%). This proportion was much higher than that seen in the previous research (where none were day trippers travelling more than 3 hours), and also higher than the all Wales average (16%).

In 2011, most visitors to Alwen most visitors were more local, with 88% travelling less than 3 hours for a day trip (34% in 2014): around half of visitors across all Wales sites in 2014 travelled for less than 3 hours (49%).

Only a small proportion of visitors to Alwen in 2014 were staying overnight or as part of a longer holiday / visit (10%), which is in line with the 2011 research (12%) but lower than the all Wales average (34%).

**Figure 3: Q2. Type of visit**



## 4.2 Visitor origin

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

Most visitors to the site travelled from within Wales (68%), with virtually all of these travelling from North Wales (67%) - this was a much higher percentage than the all Wales average (20%).

Most other visitors to Alwen came from England (30%), with none visiting from the rest of the UK and only 2% from abroad – Table 3 below and Figure 4 overleaf provide more details.

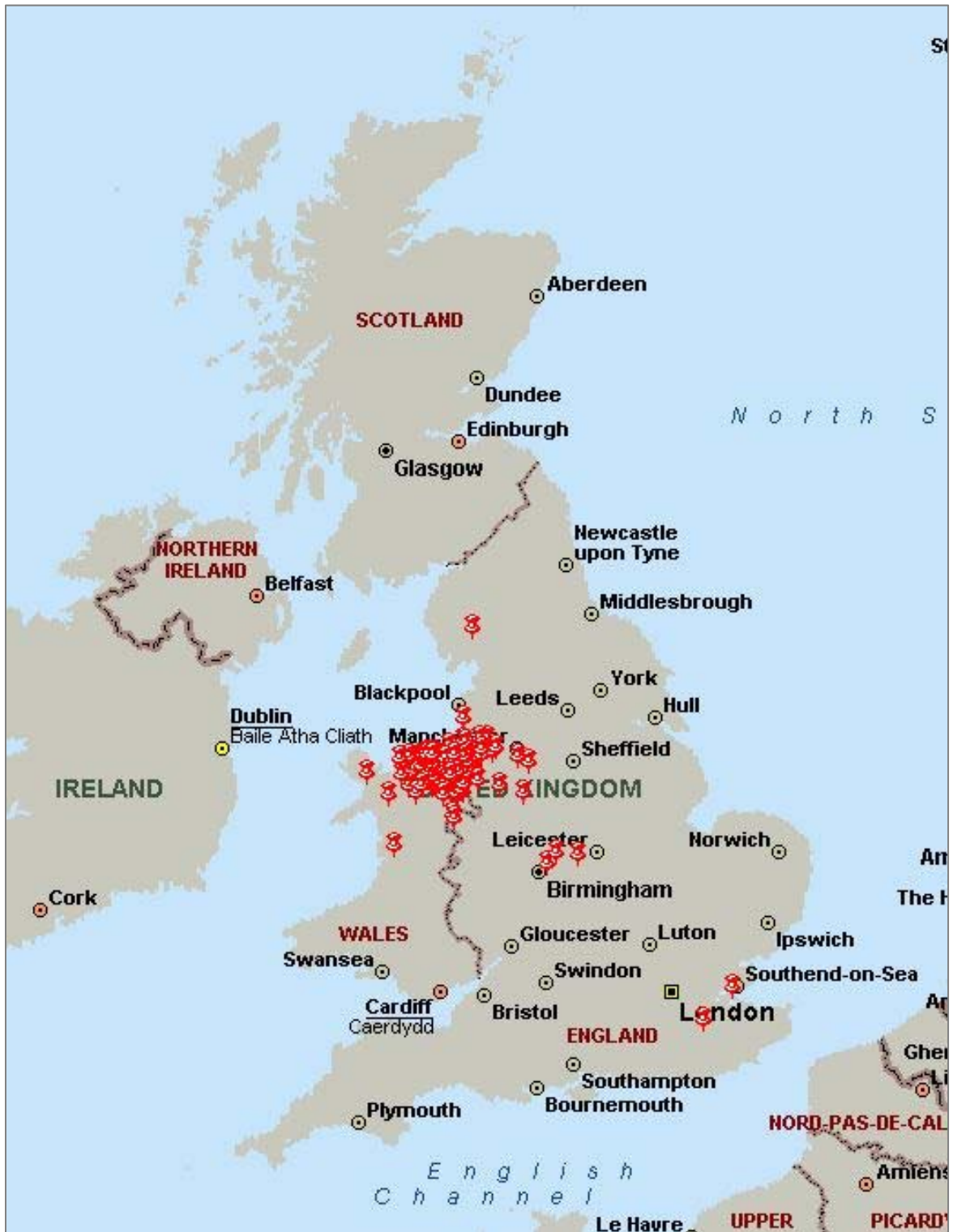
**Table 3: Q28b. Visitor origin 2014**

		Alwen	All Wales
		%	%
<b>Home region</b>	North Wales	67	20
	Mid / West Wales	1	21
	South West Wales	-	5
	Valleys	-	10
	South East Wales	-	5
	Outside of Wales	32	40
<b>Home nation</b>	Wales	68	60
	England	30	38
	Rest of UK	-	<1
	Abroad	2	2
	Refused	<1	<1

Base: All visitors – Alwen (133); All Wales (1,154)



Figure 4: Map of visitor origin for Alwen



### 4.3 Frequency of visits

#### 4.3.1 First-time visitors

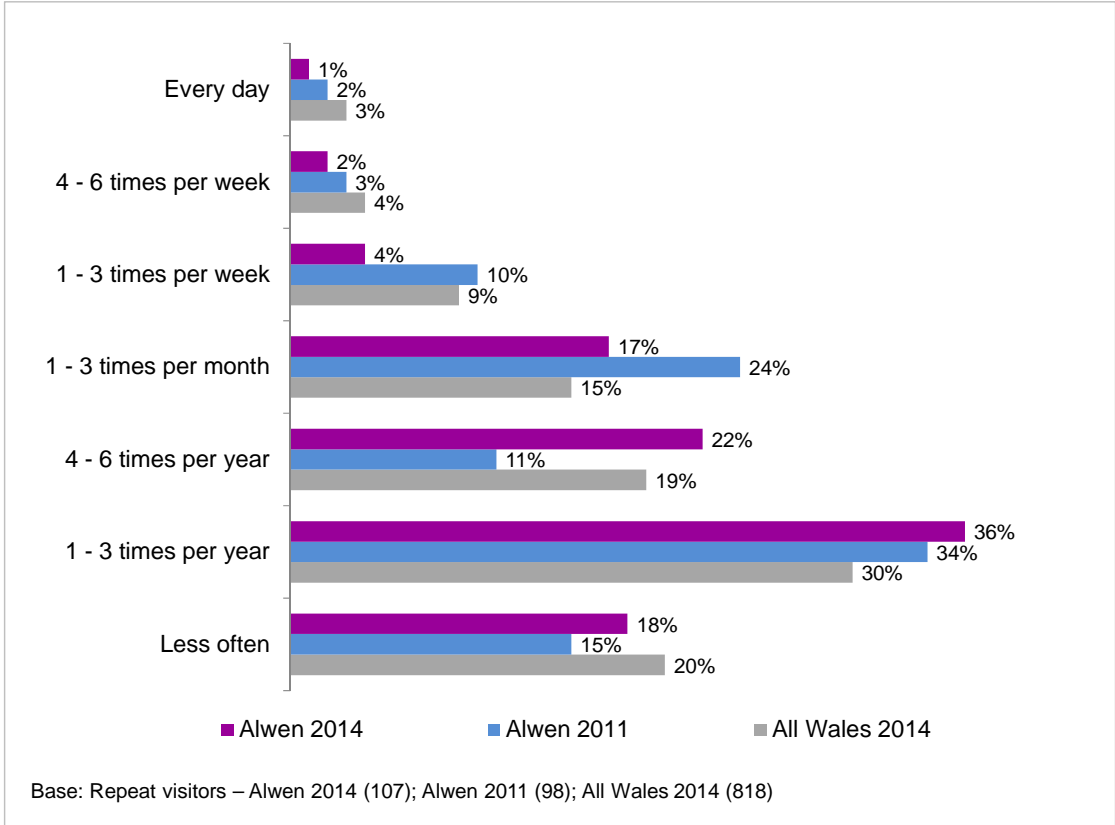
In 2014 a fifth (20%) of visitors to Alwen were first-time visitors (lower than the 2011 figure of 28%). This proportion was also lower than the all Wales average of 29% who said they had never visited their respective forest sites before. Therefore, most visitors had been to the site previously (80%).

#### 4.3.2 Repeat visitors

Focussing on repeat visitors, it can be seen that the largest proportion were made up of the more infrequent visitors, who visited Alwen 4-6 times a year or less often.

These infrequent visitors accounted for 76% of repeat visitors in 2014, slightly higher than the 2011 figure of 60% and the all Wales average of 69% visiting 4-6 times a year or less often. Only 7% visited Alwen on a weekly basis, compared to 15% in 2011.

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



#### 4.4 Length of visit

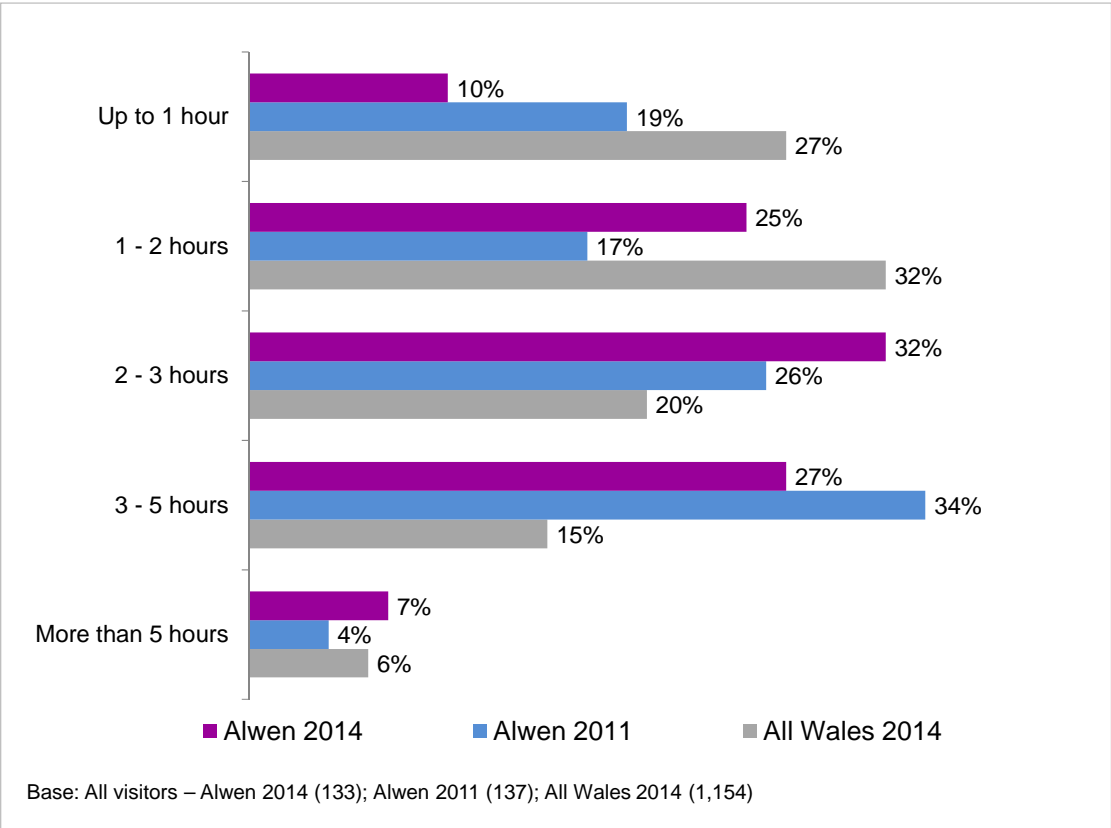
Visitors to Alwen were at the site an average of 9 minutes longer in 2014 than in 2011. In 2011 the average length of visit was 2 hours and 33 minutes, whilst in 2014 it was 2 hours and 42 minutes. The average length of stay across all sites in Wales was 2 hours and 7 minutes.

The changing lengths of time visitors spent at Alwen can be seen below. The increases in average time spent at the site (compared to 2011) were mainly due to a decrease in the proportion visiting for up to an hour (10% in 2014 compared to 19% in 2011) and an increase in the proportion visiting for between 1–3 hours (57% in 2014 compared to 43% in 2011).

Saying that, a slightly higher proportion of visitors reported to have been at the Alwen site for more than 3 hours in 2011 (38%) compared to 2014 (34%).

On the whole, visitors to Alwen were more likely to be on-site for longer periods than the all Wales average – see Figure 6 below.

**Figure 6: Q5. 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 at Alwen was walking generally (68%) - this was in line with the all Wales average (69%), but slightly lower than the 2011 figure (74%). At Alwen, as with all the Wales sites, using sign-posted trails was the most popular mode of walking (46% vs. 42% all Wales).

Other popular activities at Alwen in 2014 included having a picnic or barbeque (17%: up from 12% in 2011), admiring the views (17%: down from 28% in 2011), using the café / restaurant / other catering (9%) and fishing (9% - not mentioned in 2011).

Cycling represented a relatively small percentage of activities at Alwen (17%), but this was comparable to both the 2011 data (17%) and the all Wales data (22%).

Other activities mentioned in 2014 that did not present themselves in the 2011 research included running / jogging, an organised trip / event, and a forest drive (5% for each).

The vast majority of visitors took part in 'active' activities (87%): this proportion is identical to both the 2011 research and the all Wales figure (87% for both) – see Table 4 overleaf.

**Table 4: Q4a/Q4b/Q4c. Activities taken / intend to take by all members of visitor group**

	Alwen 2014 %	Alwen 2011 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	15	15	15
Cycling off trails or tracks	2	4	11
<b>TOTAL CYCLING</b>	<b>17</b>	<b>17</b>	<b>22</b>
Walking on a sign-posted trail	46	56	42
Walking but not following sign-posts	8	13	12
Dog walking	29	27	30
<b>TOTAL WALKING</b>	<b>68</b>	<b>74</b>	<b>69</b>
Picnic or barbeque	17	12	17
Admiring the views	17	28	26
Using the café / restaurant / other catering	9	7	33
Fishing	9	-	1
Photography	5	21	11
Running / jogging	5	-	3
Organised trip / event	5	-	2
A forest drive	5	-	2
Using the Visitor Centre or shop	4	7	14
Nature / natural history visit	3	10	7
Seeing something in the forest	3	4	2
Bird watching	2	11	15
Using the play area	1	-	15
Other	1	10	2
<b>Taken part in ACTIVE activities</b>	<b>87</b>	<b>87</b>	<b>87</b>

Base: All visitors – Alwen 2014 (133); Alwen 2011 (137); All Wales 2014 (1,154)

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

## 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 activities have been analysed in Table 5 below – due to the small number of people undertaking cycling activities (19), this has not been commented on.

As previously mentioned, visits to Alwen lasted 2 hours and 42 minutes on average. Those walking spent an average of 2 hours and 26 minutes doing this: a small 4 minutes decrease on the 2011 average of 2 hours and 30 minutes.

A third of these visitors walked for around 1-2 hours (34%), while three in five went walking at Alwen for 2 hours or more (56%). In 2011, visitors tended to walk around the site for shorter periods: 18% walked for up to an hour in 2011 vs. 9% in 2014.

**Table 5: Q5/Q6. Time spent taking part in walking at Alwen (Actual respondents only)**

	Total duration of visit		Time spent on any walking	
	2014 %	2011 %	2014 %	2011 %
Up to 30 minutes	4	9	1	7
31 – 60 minutes	6	10	8	11
1 – 2 hours	25	17	34	16
2 – 3 hours	32	26	29	29
3 – 5 hours	27	34	26	31
5+ hours	7	4	1	2
Don't know	-	-	1	4
<b>AVERAGE</b>	<b>2 hrs 42 mins</b>	<b>2 hrs 33 mins</b>	<b>2 hrs 26 mins</b>	<b>2 hrs 30 mins</b>

Base: All respondents - 2014 (133); 2011 (137)  
 Respondents who walked - 2014 (89); 2011 (96)

#### 4.7 Money spent at site and in the area as a result of the visit

Visitors to Alwen were asked how much they intended to spend at the site during their visit on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. The figures seen in Figure 7 show the figures calculated by combining the data across all types of spending.

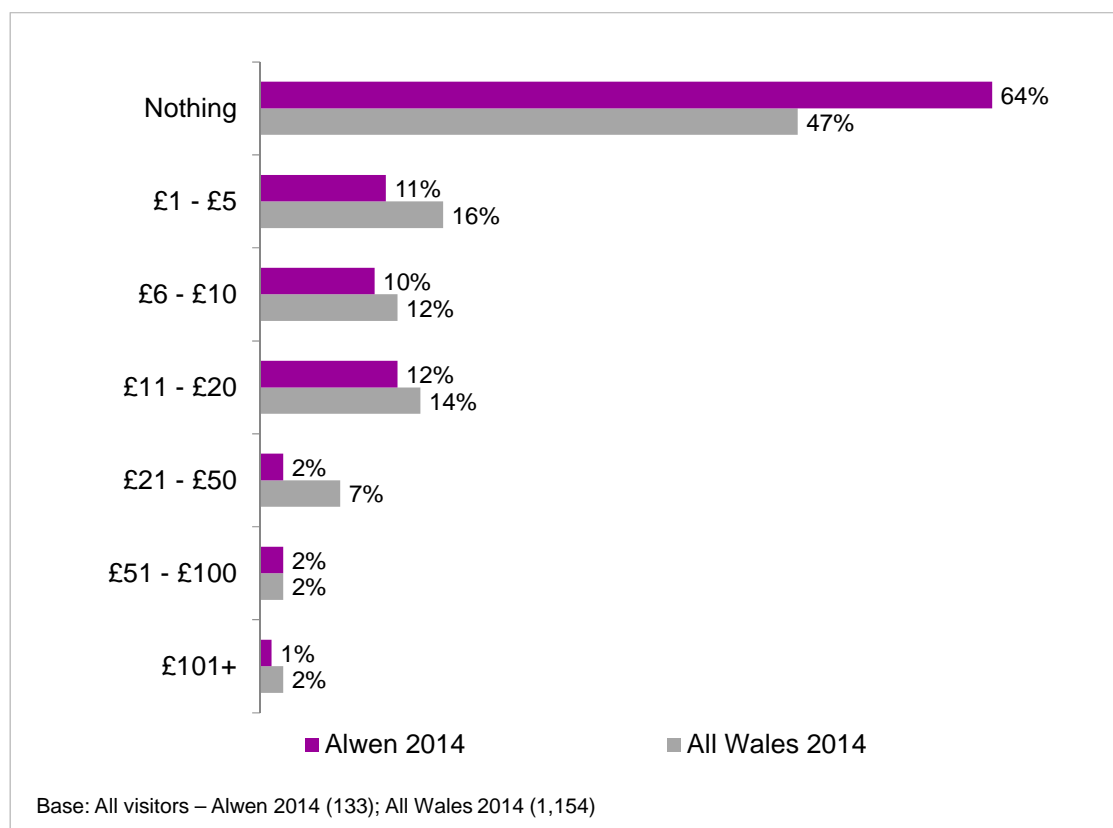
Two thirds of the visitors interviewed (64%) said that they did not intend to spend any money at the site during their visit – this was much higher than the all Wales figure of 47%.

Around one in ten said they would spend up to £5 at the site (11%), £6-£10 (10%) or £11-£20 (12%) – only a small proportion of 5% would spend more than £20 at the site. The average intended spend was £6.47 (compared to £11.15 for all Wales).

*NB The spend data is based on all visitors, not just on those who said they would spend something. This allows an average spend across all visitors to be calculated. However, when not many visitors to a site plan to spend on something (particularly if that feature is not available at a site), the average spend shown can appear to be low/unusual, and comparisons to the all Wales data should be considered with this in mind.*

The data for Alwen was, on the whole, comparable to the all Wales data.

**Figure 7: Q18a. Average spend per person/group at site – frequency of spending within each price range**



When looking at individual types of spending at the site, the item that the highest proportion of visitors to Alwen were likely to spend anything on was food and drink, with a quarter (25%) planning to spend on this (average of £3.14, less than the all Wales average of £5.53).

Another area of spend at the site was parking; a tenth of visitors (11%) were likely to spend an average of £0.23 on this (NB averages include zeros). This was much lower than the all Wales average spend on parking of £2.06.

**Table 6a: Q18a. Average spend across individual items at the site (includes zero spend)**

	% spending anything on items		Average spend on items £	
	Alwen %	All Wales %	Alwen £	All Wales £
Food and drink	25	39	£3.14	£5.53
Activities at the site	-	1	-	£0.06
Parking	11	41	£0.23	£2.06
Souvenirs / gifts	2	4	£1.55	£0.54
Hiring equipment	3	2	£1.02	£1.25
Anything else	4	4	£0.54	£1.77

Base: All visitors – Alwen 2014 (133); All Wales 2014 (1,154)



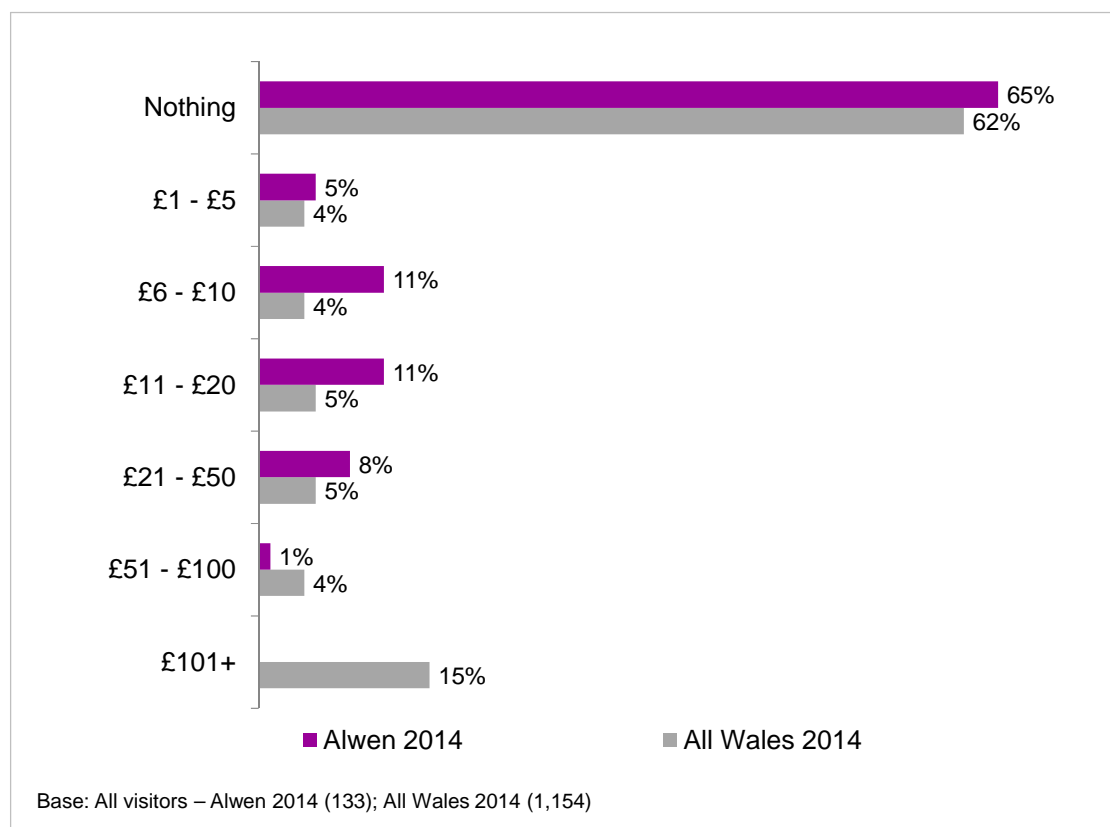
Visitors to Alwen were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Figure 8 show the figures calculated by combining the data across all types of spending.

Two thirds of visitors to Alwen claimed that they would not be spending anything in the area as a result of their trip (65%); this was in line with the all Wales average (64%).

Most of the remaining visitors to Alwen intended to spend £1-£20 in the area (27%), with only 1% saying they would spend £21-£50, and no one saying they would spend any more than this. In contrast, across all Wales sites, a quarter of visitors intended to spend more than £21, with 15% of these saying they would be spending over £101 in the area as a result of their trip to the site.

The resulting average spend in the area as a result of visiting Alwen was £6.41, considerably lower than the all Wales average of £84.86 – this is most likely a result of there being very few staying visitors at Alwen (accommodation accounting for the highest average intending spend across all sites).

**Figure 8: Q18b. Average spend per person/group in local area – frequency of spending within each price range**



Looking at spend in the local area as a result of their visit to Alwen, food and drink and transport were mentioned by the highest proportion of visitors (20% and 18% respectively). Visitors were likely to spend £3.58 on food/drink and £2.40 on transport.

No one intended to spend anything on accommodation in the area as a result of their visit to Alwen.

**Table 6b: Q18b. Average spend across individual items in the local area (includes zero spend)**

	% spending anything on items		Average spend on items £	
	Alwen %	All Wales %	Alwen £	All Wales £
Food and drink	20	27	£3.58	£26.37
Accommodation	-	15	-	£50.24
Admissions to other attractions	-	5	-	£4.97
Parking	3	10	£0.11	£1.56
Transport	18	20	£2.40	£9.83
Souvenirs / gifts	-	7	-	£2.68
Hiring equipment	-	1	-	£0.20
Anything else	2	3	£0.42	£2.37

Base: All visitors – Alwen 2014 (133); All Wales 2014 (1,154)

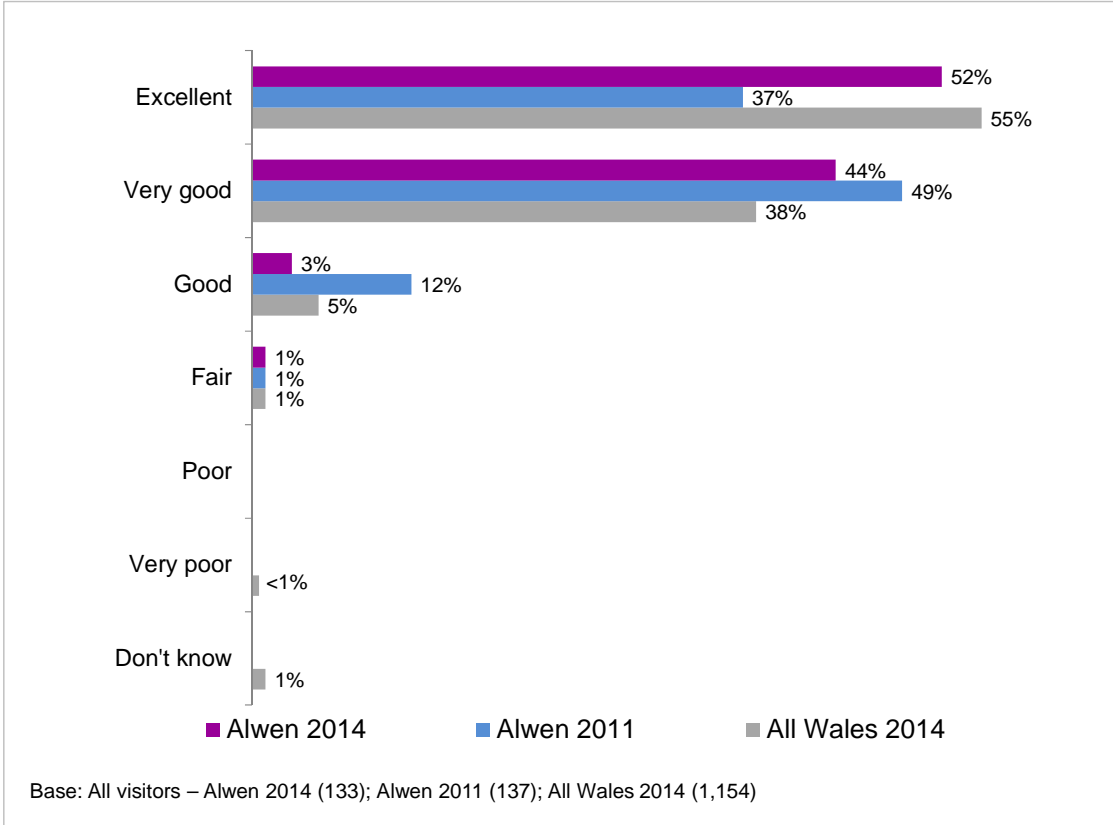
## 5. Perceptions of the site

### 5.1 Overall rating of the site as a place to visit

Perceptions of Alwen as a place to visit were very positive. This was also the case across all Wales sites and was found in the previous study conducted in 2011. In fact nobody interviewed at Alwen in 2011 or 2014 gave a negative rating of the site.

Half (52%) rated the site as 'excellent', which is in line with the all Wales findings (55%) and higher than the previous study conducted at Alwen in 2011 (37%). A further two fifths (44%) gave the site a rating of 'very good' and 3% rated it as 'good'.

Figure 9: Q16. Rating of the site as a place to visit



Repeat visitors were more likely to rate the site as 'excellent' compared to first-time visitors (56% vs. 35%). Staying visitors were also more likely to give an 'excellent' rating (62%) than day-trip visitors (51%), although this finding should be treated with some caution due to the small base size for staying visitors (13 individuals).

### 5.2 Overall rating of the site as safe and welcoming

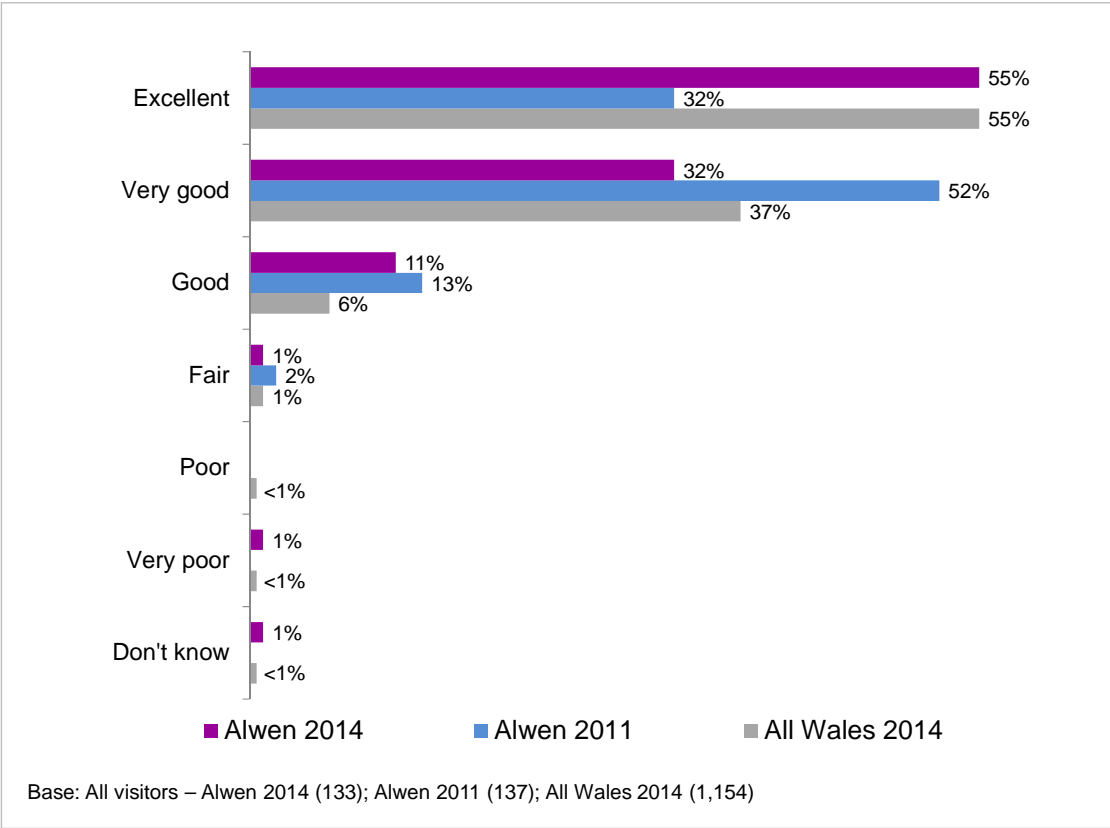
Similarly, ratings of how safe and welcoming Alwen was were also very positive. This was also the case across all Wales sites, and views were more positive in 2014 compared to 2011. Only a very small proportion gave a negative rating of the site in terms of it being safe and welcoming.

Over half the visitors gave this measure an ‘excellent’ rating (55%); this matches the figure obtained for all Wales sites (55%) and is higher than the 2011 figure of 32%.

Another third (32%) gave a ‘very good’ rating for how safe and welcoming Alwen felt (compared to 52% in 2011 and 37% across all Wales sites). One in ten (11%) gave a ‘good’ rating (13% in 2011).

Just 1% rated the site as ‘very poor’ in terms of how safe and welcoming it felt (equating to 1 individual).

**Figure 10: Q11. 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 7 below details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Alwen and all Wales sites.

The scenery, views and beautiful environment were mentioned by most visitors (57%), whilst 45% said that Alwen was peaceful, tranquil and relaxing. The beauty and tranquillity of Alwen were favoured more at Alwen compared to all sites in Wales.

Around a third (30%) said that the site was a safe environment generally, while 8% specifically mentioned that it was safe for children.

A quarter of visitors mentioned the fresh air and open spaces (25%), and another 17% commented that the site was well-signposted.

**Table 7: Q12. Reasons for giving a positive rating on how safe and welcoming the site feels – main mentions**

	Alwen 2014 %	All Wales 2014 %
The scenery / views / beautiful environment	56	41
Peaceful / pleasant / tranquil / relaxing / welcoming	45	32
Safe environment generally for all people	30	28
Fresh air / open space / plenty of space / freedom	24	22
Well signposted / good maps / info boards	17	16
Good provision of paths / trails and tracks	12	16
Clean / tidy / well maintained / litter free	12	17
Good, safe place for the kids to play / run around	8	15
Well laid out / well organised / good set-up	8	14
Good quality facilities / amenities	8	14
Other visitors are friendly	7	6
Live locally / convenient / easy to get to / close	5	8
Good car parking	4	5
Friendly / helpful staff or rangers	2	9
Dog friendly	2	2
Good value for money / cheap / free	2	1
Plenty of other people around	2	1
General positive comments	2	2
Some negative comments	2	3

Base: Visitors rating the site as excellent, very good or good – Alwen 2014 (130); All Wales 2014 (1,137)

### 5.3 Recommending the site as a place to visit

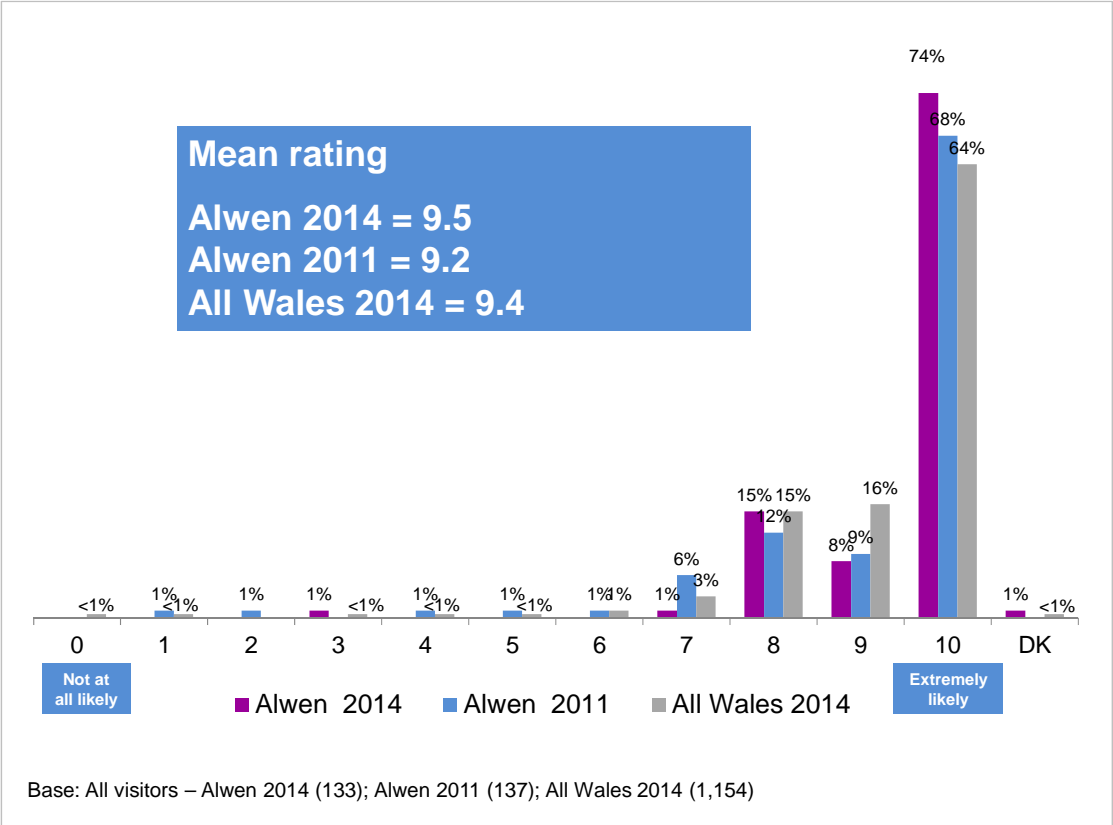
Visitors were asked whether they would be likely to recommend Alwen as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Alwen and all Wales sites generally were extremely positive: only 2% gave a rating of less than 8/10 for Alwen, and 3% less than 8/10 for all Wales sites.

Three quarters (74%) gave a rating of 10, which was higher than both the previous Alwen study in 2011 (68%) and the all Wales score (64%).

This was reflected in the mean scores, with Alwen 2014 standing at 9.5, compared with Alwen 2011 at 9.2 and all Wales at 9.4.

**Figure 11: 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 Alwen is 82, which is higher (by 10 points) than the score of 72 seen in 2011 and higher than the all Wales score of 78.

On a slightly different note: when asked if they were aware of the tree disease that was affecting larch trees in the area, 60% of visitors reported that they were, but had still decided to visit the site. Amongst the 53 individuals who were not aware of the disease affecting trees (39%), only 1 said that this might make a difference as to whether or not they visited Alwen again in future.

## 5.4 Favourite things about the site

Visitors to Alwen 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 8 below (compared to the previous research and the all Wales average).

Two favourite things about Alwen stood out. The most mentioned (by seven in ten) was scenery and beautiful views' (71%), followed by the peace and tranquillity of the site (57%). A third (31%) mentioned the walks, paths and trails as favourite things, with one in five mentioning the fresh air (21%).

**Table 8: Q8. Favourite things about the site – main mentions**

Activities	Alwen 2014 %	Alwen 2011 %	All Wales 2014 %
Scenery / views / beautiful / natural	71	65	47
Peace / tranquillity / relaxation / atmosphere	57	50	49
Walks / paths / trails	31	23	34
Fresh air / being outside	21	15	17
Like forests / trees / variety of trees and plants	12	9	10
Wildlife / bird watching	10	10	18
Cycle trails / freedom / opportunity to cycle	9	6	16
Rivers / creeks / waterways	8	-	3
Safe environment	5	3	10
Not crowded / not too many people	5	-	3
Exercise / keeping fit	5	4	7
Fishing	5	-	1
Good accessibility	5	-	4
Activities that are good for the children	3	3	9
Been before / wanted to come again	3	-	6
Cost / value for money / free	2	-	6
Close to home / convenient location	2	4	12
Opportunity to spend time with family / friends	2	-	4
Well signposted / good maps / info boards	2	-	1
Ideal for dogs / dog friendly / safe for dogs	2	4	4
Open space / plenty of space	2	-	1

Base: All visitors – Alwen 2014 (133); Alwen 2011 (137); All Wales 2014 (1,154)



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

- Staying visitors were more likely to mention the peace, tranquillity and relaxation (85%) than day trip visitors (70%) – NB small base size for staying visitors (13)
- The peace and tranquillity of the site was mentioned by a higher proportion of men (66%) than women (47%)
- Visitors categorised as ABC1 socio-economic groups were more likely to like the paths, walks and trails (38%) than those from C2DE groups (18%)
- Fresh air / being outside was of value to a higher proportion of visitors with a limiting illness or disability (40%) compared to those with no illness / disability (18%) - NB small base size for visitors with a limiting illness / disability (10).

## 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 half of visitors to Alwen could not think of anything that would add to their enjoyment and only made positive comments (46%). This was identical to the all Wales average of 46%.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. The most frequently mentioned improvement related to the toilet facilities: 15% of visitors wanted to see these ungraded, or more toilets / showers / changing facilities around the site. A further one in ten would like to see more seating and picnic areas (8% for each).

More dog poo bins would enhance the enjoyment at Alwen for 7% of visitors, while a further 5% would like to see more litter bins, better signage or an improvement to path surfaces.

**Table 9: Q9. What would enhance enjoyment of site – main mentions**

	Alwen 2014 %	All Wales 2014 %
<b>Nothing / general positive comments</b>	<b>46</b>	<b>46</b>
Improve toilets / more toilets / shower facilities / changing area	15	6
More seating	8	3
More picnic areas / BBQ / picnic tables and chairs	8	3
More dog poo bins / remove dog poo	7	7
More bins / litter bins / recycling bins / less litter	5	4
Improve signage / more maps / better maps	5	6
Improve maintenance of paths / cycle trails / better surfacing	5	3
Better access / make more accessible	4	2
Better weather / more sunshine	3	2
More information on vegetation / wildlife	2	2
Provide café / catering / refreshments	2	2
Better parking (easier, cheaper, more, free)	2	3
Longer / more challenging trails, paths and cycle routes	2	2

Base: All visitors – Alwen 2014 (133); All Wales 2014 (1,154)

There were a few comments made by one or two visitors:

- More activities for children / more play areas
- More trails, paths and cycle tracks
- Improve the café / catering
- Negative comments made about dogs.

When asked if there was anything that interfered with their enjoyment of their visit to Alwen, over four in five reported that nothing had interfered with their enjoyment (80%). This was higher than the all Wales average of 70%.

The comments made were mentioned by very small proportions, and Table 10 below details those made by 2% of the sample or more.

A lack of litter bins was mentioned by 4%, with expensive parking, dog mess, problems getting around the site and the weather mentioned by 2%.

**Table 10: Q10. What interfered with enjoyment of site – main mentions**

	Alwen 2014 %	All Wales 2014 %
<b>Nothing</b>	<b>80</b>	<b>70</b>
Need more litter bins / recycling bins / too much litter	4	2
Car park expensive / should be free parking	2	1
Dog mess on paths / in play areas	2	4
Problems getting around the site (trails closed etc.)	2	2
Wet / raining / windy (poor weather)	2	8
Dogs off leads / loose dogs / don't want dogs around	2	1
Issues with toilets (not enough, closed, dirty etc.)	2	2
Poor maintenance of site (paths, fences, waterways)	2	1
Some paths are difficult / dangerous	2	<1

Base: All visitors – Alwen 2014 (133); All Wales 2014 (1,154)

There were a few comments made by one or two visitors:

- Need more seating
- Midges (in the café)
- Comments on the cost of visiting the site.

## 6. Site facilities

### 6.1 Importance of site facilities

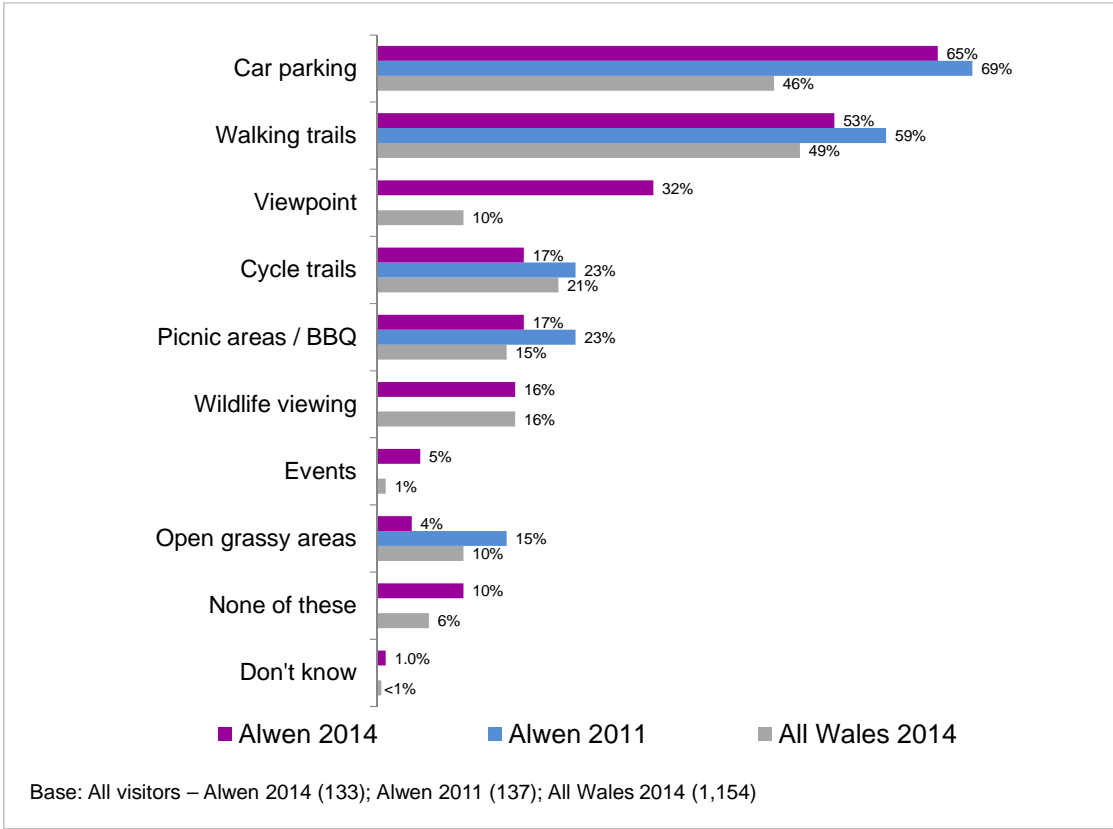
Visitors were presented with a list of facilities available at Alwen and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

Car parking was mentioned by the highest proportion of visitors to Alwen (65%); this was in line with the previous research (69%) but higher than the all Wales average (46%).

Walking trails were mentioned by half of visitors (53%), in line with both the 2011 survey (59%) and the all Wales average (49%). Cycle trails were important to a smaller proportion of visitors (17%); slightly lower than the previous research (23%) and the all Wales figure (21%).

Aspects that were important to the decision to visit in 2014, but were not mentioned in 2011 included the Viewpoint (32%), wildlife viewing (16%) and events (5%). Picnic areas and open grassy areas were of less importance in 2014 (17% and 4% respectively) than in 2011 (23% and 15% respectively).

**Figure 12: Q13. Importance of different facilities in deciding to visit the site**



Certain other factors (apart from site facilities) were important to around a quarter of visitors when choosing to come to the site (26%). Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

Other factors included good weather (6%), coming to use the river / pond / lake, the peace / tranquillity of the area and having some free time (4% for each).

**Table 11: Q14. Others factors influencing visit to site – main mentions**

	Alwen 2014 %	All Wales 2014 %
<b>Nothing</b>	<b>74</b>	<b>60</b>
Good weather / sunny / warm	6	4
Came to use the river / pond / lake	4	1
Relaxing / peaceful / tranquil / quiet	4	3
Had some free time	4	1
Came for a nice day out	3	2
Good facilities	3	3
Close to home / local / convenient	2	7
Meeting / visiting with family and friends	2	3
Wanted to go walking / cycling	2	3
Beautiful scenery / views / natural beauty	2	2
Easily accessible / easy to get around	2	1
Dog friendly / dogs can come off leads / dog facilities	2	5
Good value for money / cheap / free	2	1

Base: All visitors – Alwen 2014 (133); All Wales 2014 (1,154)

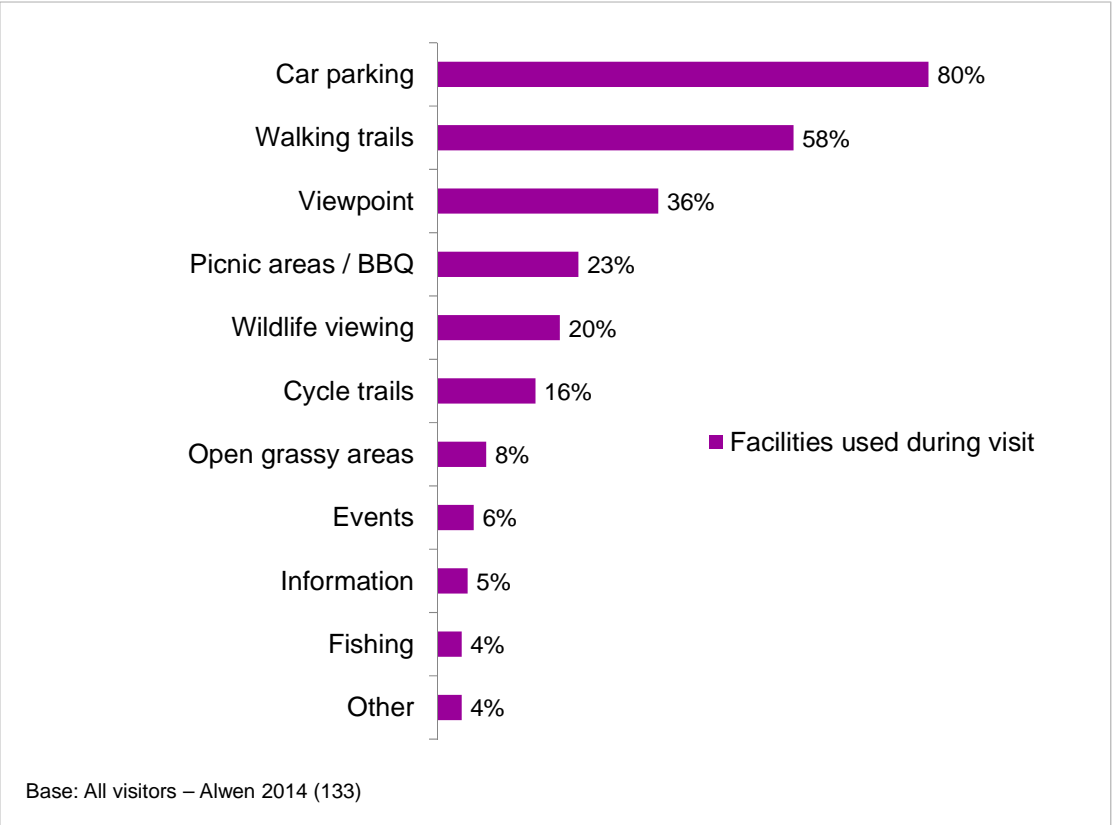
## 6.2 Facilities used

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. Parking was used by the highest proportion of visitors (80%), followed by walking trails (58%).

The Viewpoint was used by over a third of visitors to Alwen (36%), while around a fifth used the picnic / BBQ areas (23%) or the wildlife viewing (21%). Facilities used by the smallest proportions of visitors included events (6%), information (5%) and fishing (4%).

**Figure 13: Q15a. Facilities used at Alwen 2014**



On a slightly different note: just under half of visitors had a dog with them (45%), and the vast majority of these (83%) said that they would use paths and trails that had been designed for dog walkers in mind, if they were available.

### 6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by 30 or more visitors to Alwen have been detailed in Figure 14 below. Ratings of most of the facilities were extremely positive, with none of the visitors interviewed giving any of these facilities a poor rating, and the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

The facility that received the highest score was the Viewpoint. Over half rated this as ‘excellent’ (56%) whilst the remainder rated it as ‘very good’ (35%) or good (8%). The walking trails and cycle trails also received very high scores: half rated the walking trails as ‘excellent’ (48%) whilst 43% said the same of the cycle trails.

Around a third rated the car park and wildlife viewing as ‘excellent’ (37% and 30% respectively) whilst most of the remaining users rated them as ‘very good’ or ‘good’ (55% and 56% respectively).

The facility that received the least positive rating was the picnic areas / BBQ: 16% gave this a rating of ‘excellent’, while the same proportion gave a ‘very good’ rating (16%) – a quarter (25%) rated this facility as ‘fair’.

**Figure 14: Q15b. Rating of Alwen site facilities (where used) 2014 – main facilities used**

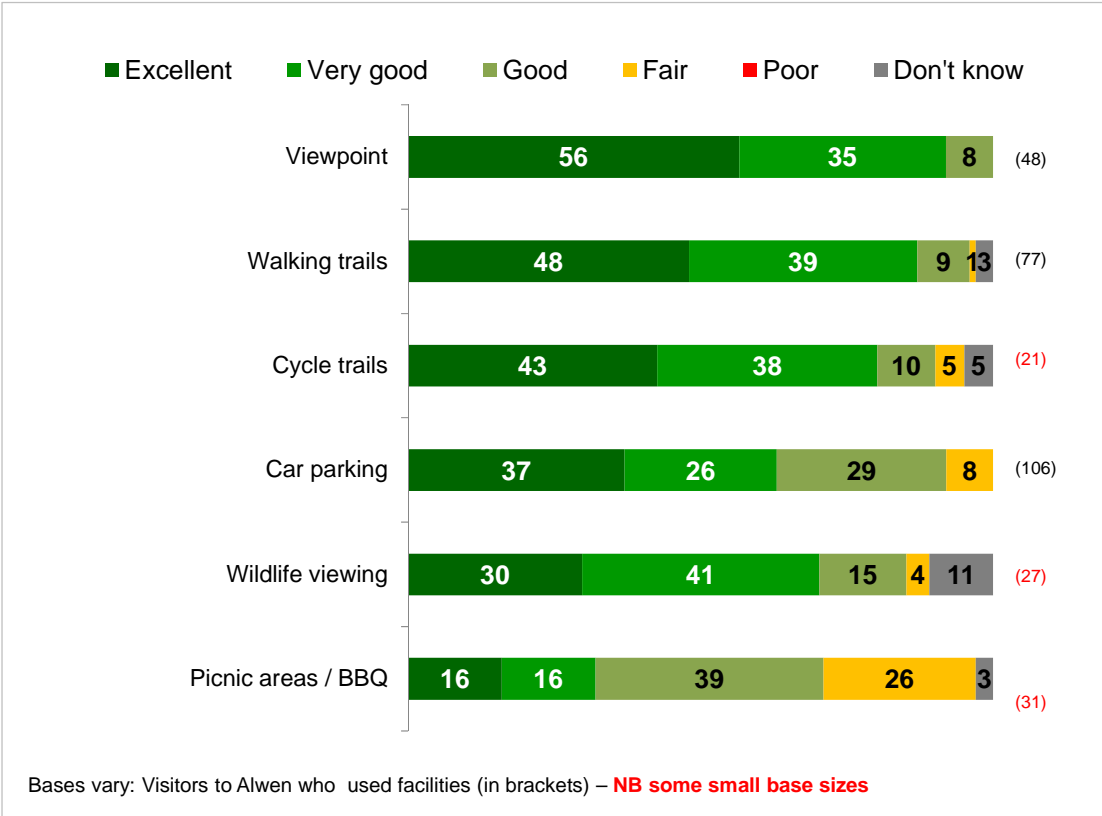


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2014 compared to 2011, where they were mentioned in the previous survey.

Encouragingly, for all the facilities listed, the proportion who gave an 'excellent' rating has increased since the previous research, with the most significant increases seen in the proportions rating the walking trails, cycle trails and car parking as 'excellent' (33, 25 and 25 percentage point increases respectively).

**Table 12: Q15b – Proportions rating facilities at Alwen as 'Excellent' 2014 vs. 2011**

<b>Facilities</b>	<b>Alwen 2014 %</b>	<b>Alwen 2011 %</b>	<b>% point change</b>
Walking trails	48	15	<b>+33</b>
Cycle trails	43	18	<b>+25</b>
Car parking	37	12	<b>+25</b>
Picnic areas / BBQ	16	6	<b>+10</b>

Bases vary: visitors using each facility – NB some small bases



## 7. Sources of information used to plan visit

Visitors were asked where they found out about Alwen 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.

Most visitors had always known about the site (61%): as would be expected, this was much higher amongst repeat visitors (73%) compared to first-time visitors (12%). Just under half of all visitors to Alwen in 2011 had always know about the site (48%).

A quarter of visitors heard about Alwen through word of mouth (23%), in line with both the 2011 and all Wales figures (20% for each). First-time visitors were more likely to have found out about the site through word of mouth (31%) than repeat visitors (21%).

Other sources of awareness included just passing / én route (7%), maps (5%, down from 11% in 2011) and Google, which was not mentioned in 2011 (4%).

**Table 13: Q7 – How found out about the site as a place to visit – main mentions**

	Alwen 2014 %	Alwen 2011 %	All Wales 2014 %
Always known about it / been here before	61	48	51
Word of mouth	23	20	20
Just passing / én route	7	7	13
Map	5	11	2
Google / other search engine	4	-	5
Other websites	3	5	2
Leaflet	2	1	4
Book / guide book	2	-	1

Base: All visitors – Alwen 2014 (133); Alwen 2011 (137); All Wales 2014 (1,154)

There were a few sources named by one or two visitors:

- Tourist Information Centre
- Road signs
- Forestry Commission Website
- Natural Resources Wales website
- Accommodation provider.

## 8. Visiting other areas and attractions

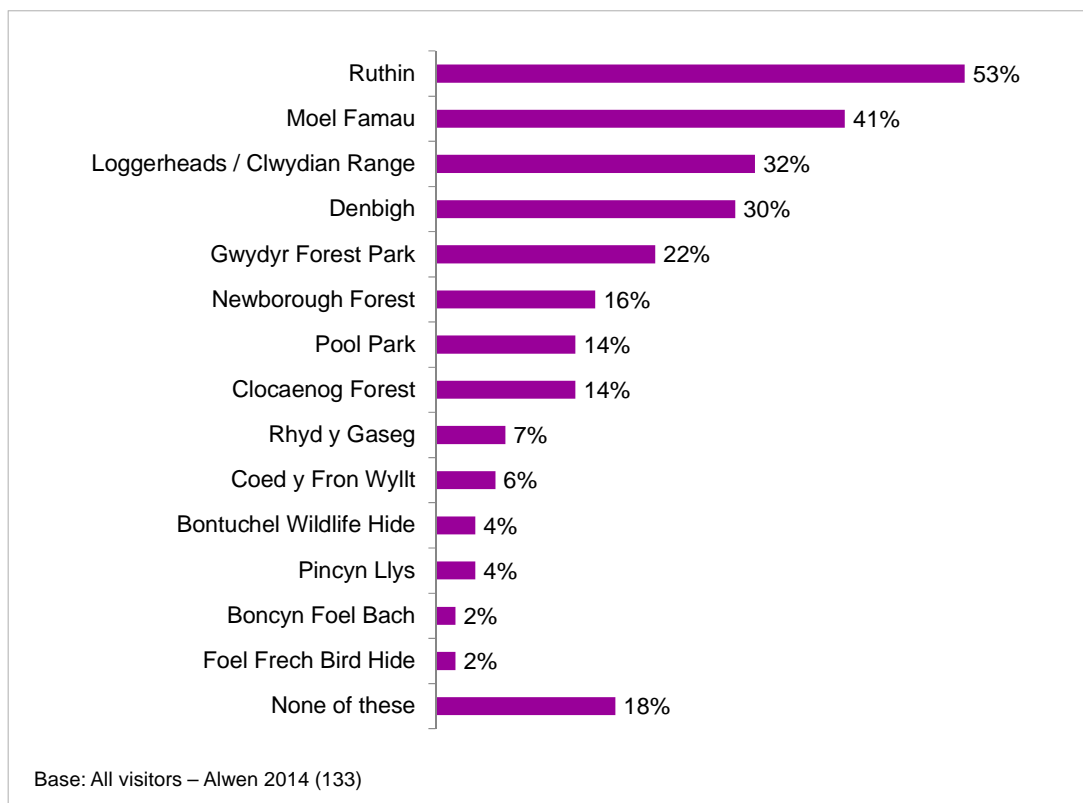
Visitors to Alwen were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: most visitors (82%) had visited at least one.

Ruthin was visited by the highest proportion of Alwen visitors (53%), followed by Moel Famau (41%), Loggerheads / Clwydian Range Visitor Centre (32%) and Denbigh (30%). Day-trip visitors were much more likely to have visited these three locations compared to staying visitors.

The attractions / areas mentioned by the smallest proportions of visitors were Bontuchel Wildlife Hide, Pincyn Llys (4% for each), Boncyn Foel Bach and Foel Frech Bird Hide (2% for each).

In 2011, Bala town was mentioned by the highest proportion of Alwen visitors (74%), followed by Llyn Brenig (72%), Betws-y-Coed town and Llangollen town (69% for each) – none of these towns / attractions were mentioned in 2014.


**Figure 15: Q19. Other areas / attractions visited 2014**



## Appendix I

### Questionnaire

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

**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 the Forestry Commission 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**

**ASK S2 AND S3 IN WALES ONLY – CHANGE TO WELSH VERSION WHERE REQUIRED**

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

- Yes – fluently
- Yes – but not fluently
- No

(7)
1
2
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
- Welsh

(8)
1
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) \_\_\_\_\_  
Children aged 0-5 years \_\_\_\_\_  
Children aged 6-10 years \_\_\_\_\_  
Children aged 11-15 years \_\_\_\_\_

(9-10)  
(11-12)  
(13-14)  
(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  
A day trip of more than 3 hours away from home  
A visit that includes an overnight stay  
Part of a longer holiday / visit  
Don't know

(17)  
1  
2  
3  
4  
5

**SHOWCARD B**

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

First visit  
-----  
Every day  
4-6 times a week  
1-3 times a week  
1-3 times a month  
4-6 times a year  
1-3 times a year  
Less often  
Don't know

(18)  
1  
2  
3  
4  
5  
6  
7  
8  
9

**ASK ALL  
SHOWCARD C**

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

**PROBE** - Any others?

**RECORD IN FIRST COLUMN IN GRID BELOW - 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? **PROBE** - Any others?

**RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED**

**ASK ALL**

**SHOWCARD C AGAIN**

**Q4c** 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? **PROBE** - Any others?

**RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED**

		(20-23m)	(28-31m)	(36-39m)
		<b>Q4a Personally taken part in</b>	<b>Q4b Others in group taken part in</b>	<b>Q4c Personally / other PLANNING to take part in</b>
A	Cycling on forest roads, tracks or trails	1	1	1
B	Cycling / mountain biking off trails or tracks	2	2	2
C	Dog walking	3	3	3
D	Walking on a sign-posted trail	4	4	4
E	Walking but not following sign posts	5	5	5
F	Orienteering / Geocaching	6	6	6
G	Running / jogging	7	7	7
H	Horse riding / pony trekking	8	8	8
I	Using the café / restaurant / other catering	9	9	9
J	Using the Visitor Centre / shop	A	A	A
K	Using the play area	B	B	B
L	Nature / natural history visit	C	C	C
M	Bird watching	D	D	D
N	Photography	E	E	E
O	Picnic or barbeque	F	F	F
P	Camping	G	G	G
Q	Go Ape!	H	H	H
R	Seeing something in the forest	I	I	I
S	Organised event / trip	J	J	J
T	Admiring the views	K	K	K
U	A forest drive	L	L	L
		(24-27m)	(32-35m)	(40-43m)
	<b>OTHERS</b>			
	None of these	M	M	M

**ASK ALL**

**SHOWCARD D**

**Q5** Approximately how long have you spent here today in total?  
**SINGLE CODE**

- 0 - 15 minutes
- 16 - 30 minutes
- 31 - 60 minutes
- 1 - 2 hours
- 2 - 3 hours
- 3 - 5 hours
- 5+ hours

Don't know

(45)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8

**INSTRUCTIONS:**

**Q6 IS ASKED OF PHYSICAL ACTIVITIES THAT THE RESPONDENT HAS PERSONALLY TAKEN PART IN AT Q4a – OTHERWISE GO TO Q7**

- ASK ABOUT TIME SPENT CYCLING IF CODED **1 OR 2 AT Q4a**
- ASK ABOUT TIME SPENT WALKING IF CODED **3, 4 OR 5 AT Q4a**
- ORIENTEERING, RUNNING AND HORSE RIDING – CHECK IF CODED **6, 7 OR 8 AT Q4a**

**SHOWCARD D AGAIN**

**Q6** And approximately how long have you spent here today.....?  
**SINGLE CODE**

	(46)	(47)	(48)	(49)	(50)
TIME SPENT	<u>RESPONDENT</u> CYCLING FROM Q4a	<u>RESPONDENT</u> WALKING FROM Q4a	<u>RESPONDENT</u> ORIENTEERING / GEOCACHING FROM Q4a	<u>RESPONDENT</u> RUNNING / JOGGING FROM Q4a	<u>RESPONDENT</u> HORSE RIDING / PONY TREKKING FROM Q4a
0 - 15 minutes	1	1	1	1	1
16 - 30 minutes	2	2	2	2	2
31 - 60 minutes	3	3	3	3	3
1 – 2 hours	4	4	4	4	4
2 – 3 hours	5	5	5	5	5
3 – 5 hours	6	6	6	6	6
5+ hours	7	7	7	7	7
Don't know	8	8	8	8	8

**ASK ALL**

**SHOWCARD E**

**Q7** How or where did you find out about this site as a place to visit?  
**CODE ALL MENTIONED**

(55-58m)

Always known about it / been here before

1

Word of mouth

2

Newspaper

3

Leaflet

4

Tourist Information Centre

5

Road signs

6

Just passing / en route

7

Map

8

Smartphone app

9

Facebook

A

Twitter

B

Forestry Commission website

C

Natural Resources Wales website

D

Google / other search engine

E

Other website (please specify) \_\_\_\_\_

X

Other (please specify) \_\_\_\_\_

(59-62m)

X

Don't know / can't remember

M

**Q8** What do you like most about the site? **PROBE** Anything else?  
**DO NOT PROMPT – CODE ALL MENTIONED**

(63-66m)

Peace / tranquillity / relaxation

1

Scenery / views / beautiful

2

Walks / paths / trails

3

Cycle trails / freedom / opportunity to cycle

4

Wildlife / bird watching

5

Fresh air / being outside

6

Exercise / keeping fit

7

Activities that are good for 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)**

(67-70m)

-----  
 -----

Nothing

L

Don't know

M



**ASK ALL**

<b>Q9</b>	What, if anything, would enhance your enjoyment of this site?	(75-78m)
	<b>PROBE</b> Anything else? <b>DO NOT PROMPT – CODE ALL MENTIONED</b> <b>IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</b>	
	Better parking (easier, more, cheaper, free)	1
	Improve toilets / more toilets / shower facilities / changing area	2
	More activities for children / more play areas	3
	More trails / paths / cycle tracks	4
	Improve signage / more maps / better maps	5
	Improve café / catering	6
	More dog poo bins / remove dog poo	7
	More bins / litter bins / recycling bins	8
	Longer / more challenging trails, paths and cycle routes	9
	More seating	A
	More picnic areas / BBQ / picnic tables and benches	B
	Improve maintenance of paths / cycle tracks / better surfacing	C
	<b>Other (please specify)</b>	(79-82m)
	----- -----	
	Nothing	L
	Don't know	M
<b>Q10</b>	What, if anything, interfered with your enjoyment of this site today?	(83-86m)
	<b>PROBE</b> Anything else? <b>DO NOT PROMPT – CODE ALL MENTIONED</b> <b>IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</b>	
	Wet / raining / windy (poor weather)	1
	Car parking expensive	2
	Signs unclear / need better signs / more maps	3
	Problems with car parks	4
	Poor service in café / long queues / inconvenient opening hours	5
	Too busy	6
	Dogs off leads / loose dogs / don't want dogs around	7
	Toilets – not enough / closed / out of order	8
	Need more litter bins / recycling bins / too much litter	9
	Dog mess on paths / in play areas	A
	<b>Other (please specify)</b>	(87-90m)
	----- -----	
	Nothing	L
	Don't know	M

**ASK ALL**

**SHOWCARD F**

**Q11** How would you rate the site in terms of how safe and welcoming it feels?  
**SINGLE CODE**

- Excellent
- Very good
- Good
- Fair
- Poor
- Very poor

Don't know / not sure

(95)

- 1
  - 2
  - 3
  - 4
  - 5
  - 6
- Q12

7 → Q13

**ASK Q12 IF CODED 1-6 AT Q11**

**Q12** What are the reasons for your rating? **PROBE** Anything else?  
**DO NOT PROMPT – CODE ALL MENTIONED**

- The scenery / views / beautiful environment
- Peaceful / pleasant / tranquil / relaxing
- Fresh air / open space
- Safe environment generally
- Good, safe place for the kids to play and run around
- Clean / tidy / well maintained / litter free
- Well signposted / good maps / info boards
- Well laid out / well organised / good set up
- Other visitors here are friendly
- Good quality facilities or amenities
- Good provision of paths, trails and tracks
- Friendly / helpful staff or rangers
- Live locally / convenient / easy to get to

(96-99m)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A
- B
- C
- D

**Other (please specify)**

-----  
-----

Don't know

(100-103m)

M

**ASK ALL**

**SHOWCARD G1**

**Q13** Looking at this card, which of these aspects **of the site** were important to your decision to visit today? **PROBE** Any others?

**CODE ALL MENTIONED**

		(105-108m)
A	Car parking	7
B	Cycling trails	A
C	Events	D
D	Information available / interpretation	M
		(109-112m)
E	Picnic areas / BBQ	5
F	Viewpoint	D
G	Walking trails	F
H	Wildlife viewing	G

**Other (please specify)**

-----  
-----

None of these  
Don't know

(113-116m)

M  
N

**Q14** Can you tell me about anything else that might have influenced your decision to visit here today, other than the site facilities you have just mentioned?

**PROBE** Anything else?  
**RECORD VERBATIM**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(117-120m)

(121-124m)

Nothing  
Don't know

M  
N

**ASK ALL**

**SHOWCARD G1 AGAIN**

**Q15a** Which aspects of the site have you used during your visit today? **PROBE** Any others?  
**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....?

FOU: (140-231 FOR Q15)

**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	
		(125-128m)								
A	Car parking	7	1	2	3	4	5	6	7	(146)
B	Cycling trails	A	1	2	3	4	5	6	7	(149)
C	Events	D	1	2	3	4	5	6	7	(152)
D	Information available / interpretation	M	1	2	3	4	5	6	7	(160)
		(129-132m)								
E	Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
F	Viewpoint	D	1	2	3	4	5	6	7	(175)
G	Walking trails	F	1	2	3	4	5	6	7	(177)
H	Wildlife viewing	G	1	2	3	4	5	6	7	(178)
<b>OTHERS (WRITE IN)</b>		(133-136m)								
			1	2	3	4	5	6	7	( )
			1	2	3	4	5	6	7	( )
			1	2	3	4	5	6	7	( )

None of these  
 Don't know

M  
 N

**ASK ALL**

**SHOWCARD H AGAIN**

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

(235)

- Excellent
- Very good
- Good
- Fair
- Poor
- Very poor

- 1
- 2
- 3
- 4
- 5
- 6

Don't know / not sure

7

**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
---	---	---	---	---	---	---	---	---	---	----

(236)

**SHOWCARD I**

**Q18a** Thinking about your visit to this site today, how much are you (and your group) likely to spend here on the following things?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND  
IF NONE RECORD 0. IF DON'T KNOW, RECORD AAAA**

- Food and drink \_\_\_\_\_ (237-240)
- Activities available at this site \_\_\_\_\_ (241-244)
- Parking \_\_\_\_\_ (245-248)
- Souvenirs / gifts \_\_\_\_\_ (249-252)
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_ (253-256)
- Anything else \_\_\_\_\_ (257-260)

**SHOWCARD J**

**Q18b** And more generally, how much are you (and your group) likely to spend during your visit to this local area on the following things?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND  
IF NONE RECORD 0. IF DON'T KNOW, RECORD AAAA**

- Food and drink \_\_\_\_\_ (261-264)
- Accommodation (if staying overnight) \_\_\_\_\_ (265-268)
- Admission to other attractions \_\_\_\_\_ (269-272)
- Parking \_\_\_\_\_ (273-276)
- Transport, including public transport, taxis and petrol \_\_\_\_\_ (277-280)
- Souvenirs / gifts \_\_\_\_\_ (281-284)
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_ (285-288)
- Anything else \_\_\_\_\_ (289-292)

**ASK ALL**

FOU: (335-369 FOR Q19)

**SHOWCARD K1 (W)**

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

**CODE ALL MENTIONED**

- Clocaenog - Pool Park
- Clocaenog- Boncyn Foel Bach
- Clocaenog Forest
- Clocaenog-Bontuchel Wildlife Hide
- Clocaenog-Coed y Fron Wyllt
- Clocaenog-Foel Frech Bird Hide
- Clocaenog-Pincyn Llys
- Clocaenog-Rhyd y Gaseg
- Denbigh
- Gwydyr Forest Park
- Loggerheads / Clwydian Range Visitor Centre
- Moel Famau
- Newborough Forest
- Ruthin
  
- None of these
- Don't know

(335-338m)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A
- B
- C
- D
- E
  
- F
- G

FOU: (370-410 FOR Q20)

**Q20a** Have you heard of the tree disease that is affecting larch trees in this area?

(370)

Yes

1 **Q20ci**

No

2

Don't know

3 **Q20b**

**ASK Q20b IF NO OR DON'T KNOW AT Q20a – OTHERWISE GO TO Q20ci**

**Q20b** Do you think this would make a difference to whether or not you visited in future?

(371)

Yes

1

No

2

Don't know

3

**Q20ci INTERVIEWER – CODE IF RESPONDENT HAS A DOG WITH THEM**

(372)

Yes

1 **Q20cii**

No

2 **Q21**

**Q20cii** Would you use paths and trails that have been designed with dogs and dog walkers in mind e.g. paths and trails that included agility exercises or an off lead area?

(373)

Yes

1

No

2

Don't know

3

**ASK ALL**

**READ OUT** – Finally, I'd like to ask some questions to help with our analysis.

**Q21 INTERVIEWER RECORD GENDER**

(415)

Male

1

Female

2

**Q22** Which of the following age bands do you fall into?

(416)

16-24 years

1

25-34 years

2

35-44 years

3

45-54 years

4

55-64 years

5

65+ years

6

Refused

7

**SHOWCARD M**

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

(417)

**SINGLE CODE**

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.)

(418)

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

**Job title** \_\_\_\_\_

**Position / Grade** \_\_\_\_\_

AB

1

C1

2

C2

3

DE

4

Refused

5

<b>Q25</b>	Do you have any children aged 15 or under living in your household?	(420)
	Yes	1
	No	2
	Refused	3
<b>Q26</b>	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? <b>INCLUDES PROBLEMS RELATED TO OLD AGE</b>	(421)
	Yes – limited a lot	1
	Yes – limited a little	2
	No	3
	Refused	4
<b>SHOWCARD N</b>		
<b>Q27</b>	Which of these best describes your ethnic origin? <b>SINGLE CODE</b>	(422)
	White British	1
	White Welsh	2
	White Irish	3
	White East European	4
	White other European	5
	Any other White background	6
	Caribbean	7
	African	8
	Any other Black background	9
	Indian	A
	Pakistani	B
	Bangladeshi	C
	Any other Asian background	D
	White and Black Caribbean	E
	White and Black African	F
	White and Asian	G
	Any other Mixed background	H
	Chinese	I
	Other (please specify) _____	J
	Refused	Z



**ASK Q28a AT ENGLAND SITES ONLY**

**SHOWCARD O (E) AND PURPLE ENGLAND MAP**

**Q28a** Which of the following regions do you live in?  
**SINGLE CODE**

- North East England
- Yorkshire & Humberside
- North West England
- West Midlands
- East Midlands
- East of England
- Greater London
- South East England
- South West England

- Wales
- Scotland
- Northern Ireland
- Abroad

Other (please specify) \_\_\_\_\_

Refused

(425)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A
- B
- C
- D
- X
- Z

**ASK Q28b AT WALES SITES ONLY**

**SHOWCARD O (W) AND WALES MAP**

**Q28b** Which of the following regions do you live in? **(WALES)**  
**SINGLE CODE**

- North Wales
- Mid / West Wales
- South West Wales
- Valleys
- South East Wales

- England
- Scotland
- Northern Ireland
- Abroad

Other (please specify) \_\_\_\_\_

Refused

(426)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- X
- Z

**Q29** 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 . LEADING PART OF POSTCODE IS MOST IMPORTANT**

(427)	(428)	(429)	(430)	(431)	(432)	(433)	

Respondent Name:					
Address:					
Telephone number:					
<b>THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.</b>					
<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:	
				(435)(436)(437)(438)	
WRITE IN YOUR INTERVIEWER NUMBER →				(439)	(440)
				(441)	(442)
<b>B01326-2</b>	<b>F.O.U (BACK CHECKS)</b>		<b>Accompanied</b>	<b>Yes 1</b>	<b>Supervisor signature</b>
				<b>No 2</b>	

## 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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