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# Research Report

Quality of the  
Visitor Experience:  
Brechfa 2013



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 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 138 visitor interviews conducted at Brechfa in 2013. 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 2013).

### 1.2 Brechfa

Brechfa Forest has a long history – the Forestry Commission became managers of it in 1919 creating its present status as a multi-purpose forest for timber production, recreation and wildlife conservation.

Abergorlech and Brechfa are small villages located next to the forest. There are 89 species of trees found in the forest including Douglas fir trees and it is most known for its jays, wood pigeons, wagtails, blue tits and green tits.

The forest covers some 6,500 hectares including 17,300 acres of open access and there are walking and mountain bike trails for visitors to enjoy, with horse riders welcome on forest roads. A number of bridleways and by ways run across the farmland and common land.

Brechfa Forest has a wide variety of activities available to visitors, including walking, horse riding, picnic sites, BBQ site, mountain bike trails allowing cyclists to build up their skills and the Byrgwm trail which allows tourists to see the derelict stone buildings and historical boundaries.

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

Perceptions of Brechfa as a place to visit were very positive. This was also the case across all the Welsh sites, and was found in the previous study conducted in 2011. Nobody interviewed at Brechfa in 2013 gave a negative rating of the site.

Over half (54%) rated the site as 'excellent'. This was a little lower than the comparative 2011 Brechfa study (61%) and the all Wales average (62%). However, when the 'excellent' and 'very good' scores were combined, the 2013 Brechfa score was 97% compared with the 2011 score of 91% and an all Wales score of 94%.

Similarly, ratings of how safe and welcoming the site was were also very positive. Over half the visitors to Brechfa gave this measure an 'excellent' rating (58%), with another 36% rating it as 'very good'.

When asked whether they would be likely to recommend Brechfa as a place to visit to a friend or relative, (using a score of 0 to 10), scores for Brechfa and all Wales sites in general were positive. This was reflected in the mean scores, with Brechfa 2013 standing at 8.9, compared with Brechfa 2011 at 9.6 and all Wales at 9.4.

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

The aspects of the site liked by the highest proportion of visitors were related to peace, tranquillity and relaxation (54%). This was comparable to the all Wales figure (51%).

Over half of the visitors mentioned cycle trails and the opportunity to cycle (52%) and the rest of the most mentioned favourite things at Brechfa referred to the outdoors, scenery and exercise (above 30% for each aspect).

Almost a third (28%) liked Brechfa for being 'close to home / convenient'. This was considerably higher than the all Wales figure of 15%.

## 1.5 Areas for improvement

Nearly a third could not think of anything that would add to their enjoyment and only made positive comments (32%). However there were a number of areas where a minority mentioned aspects that needed attention:

- provision of a café / catering / refreshments (14%)
- improve signage / better signs / maps (9%)
- improve toilets / more toilets / shower facilities (9%)

The main general area where improvements were sought centred on the provisions for trails / paths and cycling in general i.e.

- More trails / paths / cycle tracks (13%)
- Improve maintenance of paths / cycle tracks / better surfacing (7%)
- Longer trails / more challenging trails, paths and cycle routes (4%)
- More/ larger cycle racks/ storage /bike wash (4%)
- Bike shop /more shops (3%).

## 1.6 Visitor profile

The majority of visitors to Brechfa had visited the site before (72%). This proportion was consistent with the all Wales average of 74% who said they had visited their respective forest sites previously.

Over half the visitors to Brechfa had travelled fewer than three hours for a day trip to the site (57%).

Around four fifths of the Brechfa visitors were male (79%), considerably higher than the all Wales figure for male visitors in 2013 (59%).

They were younger than average: over a third of visitors (37%) were 16 – 34 years compared with the all Wales figure of 21%. At the older end of the spectrum, visitors to Brechfa aged 55+ accounted for only 13%, whilst in all Wales the figure was 33%.

Brechfa visitors were skewed towards the C2DE socio-economic group, (45%), which compared with an all Wales C2DE figure of 28%.

There were more full-time employees visiting Brechfa (72%) than the all Wales average (60%), and there were fewer retired people (7%) compared with all Wales (19%).

## 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.

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. 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
<b>TOTAL</b>	<b>1,545</b>	<b>TOTAL</b>	<b>1,114</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 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 Brechfa, interviewing took place between 12<sup>th</sup> August and 13<sup>th</sup> October 2013, and a total of 138 interviews were conducted.

## **2.3 Report**

This report summarises the results of the interviews undertaken at Brechfa 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) 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 are visiting Brechfa. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2013.

The profile of people who visited Brechfa was somewhat different to the all Wales picture.

Around four fifths of Brechfa visitors were male (79%), considerably higher than the all Wales figure for male visitors in 2013 (59%).

They were younger than average: over a third of visitors (37%) were 16 – 34 years of age compared with all Wales (21%). At the older end of the spectrum, visitors to Brechfa aged 55+ accounted for only 13%, whilst in all Wales the figure was 33%.

The Brechfa visitors were skewed towards the C2DE socio economic group (45%), which compared with an all Wales C2DE figure of 28%.

There were more full-time employees visiting Brechfa (72%) than the all Wales average (60%), and there were fewer retired people (7%) compared with all Wales (19%).

More than a third of Brechfa visitors (36%) had children in the household compared with a 30% all Wales figure.

The overwhelming majority of visitors to Brechfa were White British / Welsh / Irish (97%), with a small number of visitors (3%) describing their ethnicity as 'white other' (2%) and 'black / Asian / mixed' (1%)

Just under a quarter of visitors to Brechfa spoke Welsh (23%): 9% fluently and 14% non-fluently. This was in line with 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**

		Brechfa %	All Wales %
<b>Gender</b>	Male	79	59
	Female	21	41
<b>Age</b>	16 - 24	12	6
	25 - 34	25	15
	35 – 44	27	25
	45 – 54	22	21
	55 – 64	12	18
	65+	1	15
<b>Social class</b>	AB	22	40
	C1	32	30
<b>Working status</b>	C2	28	19
	DE	17	9
	Refused	-	2
	Full-time employee (30+ hours per week)	72	60
	Part-time employee (<30 hours per week)	7	8
	Self-employed	4	6
	Full-time education	4	2
	Unemployed	4	1
	Permanently sick / disabled	-	1
	Retired	7	19
	Looking after home	1	2
	Other	<1	<1
	Refused	-	1
<b>Limiting illness</b>	Yes – limited a lot	-	2
	Yes – limited a little	-	3
	No	99	94
	Refused	1	2
<b>Children in household</b>	Yes	36	30
	No	64	69
	Refused	-	1
<b>Ethnicity</b>	White – British / Welsh / Irish	97	96
	White – Other	2	2
	Black / Asian / Mixed	1	1
	Refused	-	1
<b>Welsh speaker</b>	Yes	23	20
	No	77	80

Base: All visitors – Brechfa (138); All Wales (1,114)

### 3.2 Group profile

#### 3.2.1 Size of group

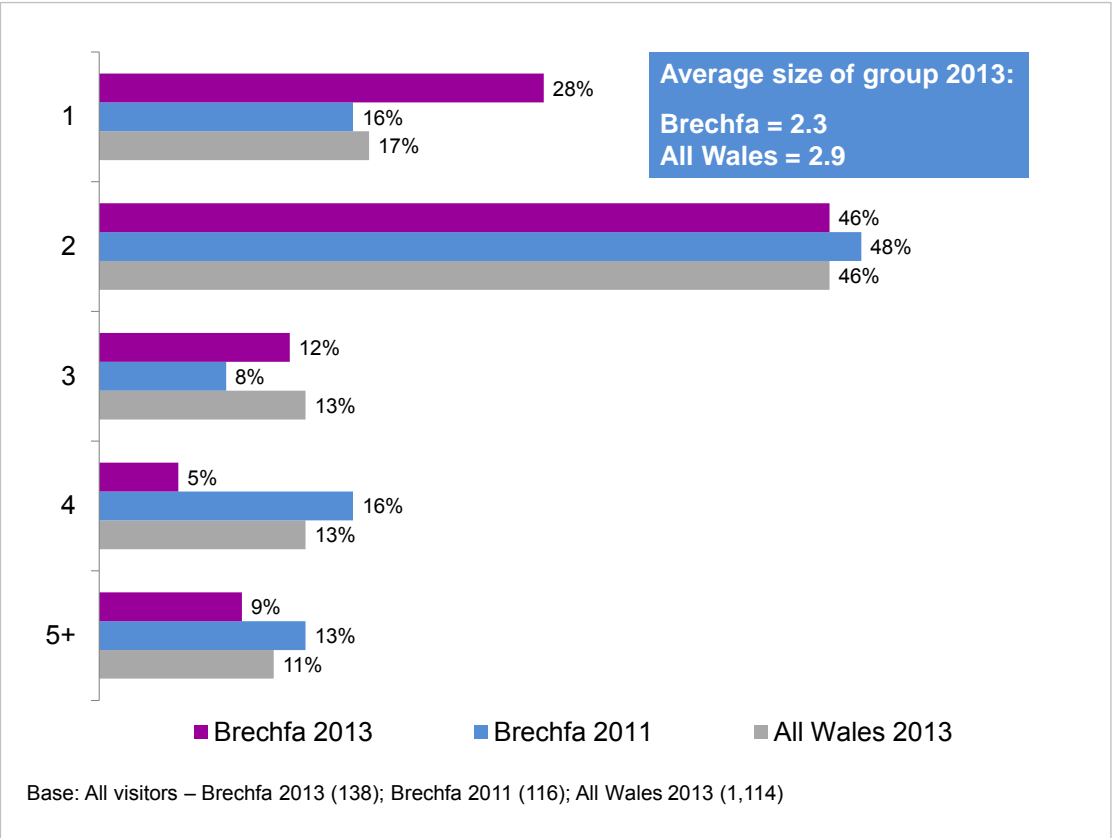
Group sizes were smaller at Brechfa (average 2.3 people) compared to the all Wales sample (average 2.9 people).

Nearly a third of people visited Brechfa alone (28%). This is considerably higher than the equivalent percentage at Brechfa in 2011 (16%) and the all Wales figure (17%).

The largest group by percentage was two people. Here the Brechfa percentage figure (46%) was the same as that for all Wales.

When it came to the bigger groups of 4 or 5+, Brechfa was lower than all Wales (14% vs. 29%) and lower than the 2011 Brechfa study (14% vs. 27%) – see Figure 1 below.

**Figure 1: Q1. Total size of the group**

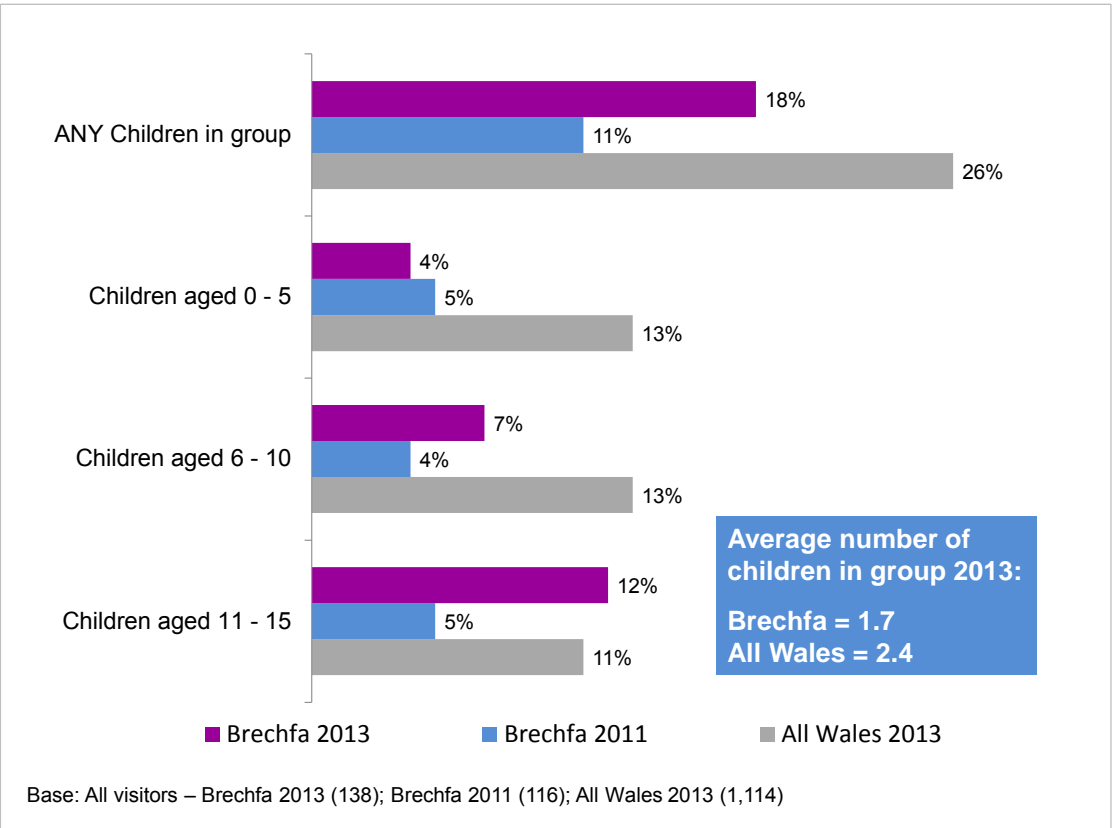


### 3.2.2 Composition of group

Less than a fifth of visitors to Brechfa were accompanied by children (18%). This is lower than for all Wales (26%), although higher than the 2011 Brechfa study (11%). The average number of children in the Brechfa groups was also lower than for all Wales (a mean of 1.7 children per group at Brechfa compared to 2.4 overall).

Children who visited the site tended to be the older, in the 11-15 years age group (12%) – see Figure 2 below.

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



## 4. Profile of visit

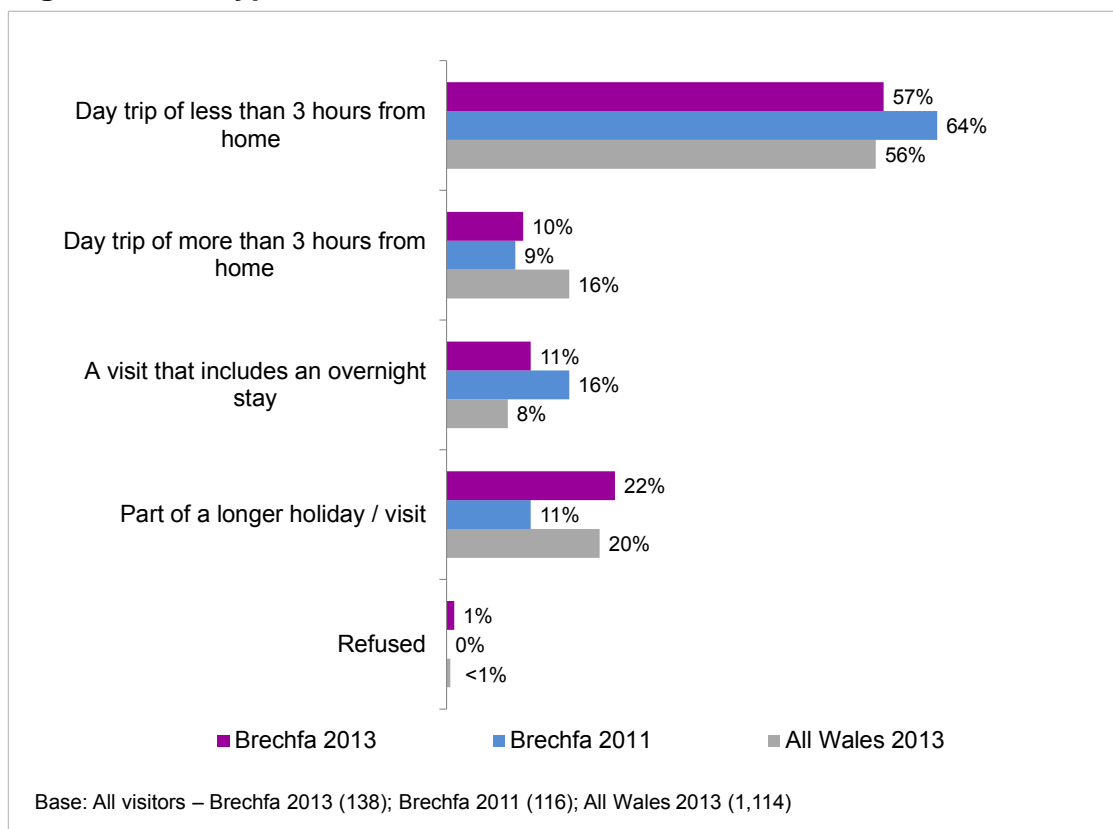
### 4.1 Type of visit

Most of the visitors to Brechfa travelled for less than three hours to visit the site (57%). This proportion was lower than the previous Brechfa research (64%) but on a par with the all Wales figure (56%).

Day trips accounted for nearly two thirds (67%) of the Brechfa visits.

There has been a growth in visits to Brechfa as part of a longer holiday visit, with 22% falling into that category in 2013 compared with 11% in 2011 – see Figure 3 below.

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.

Two thirds of the visitors to Brechfa came from Wales (66%). This was higher than the all Wales figure (57%). Most of the rest of the Brechfa visitors came from England (32%), a lower figure than the all Wales finding (40%).

The majority of visitors from Wales were from Mid / West Wales, which fits with Brechfa's geographical position, but no-one in the sample travelled from North Wales – Table 3 below and Figure 4 overleaf provide more details.

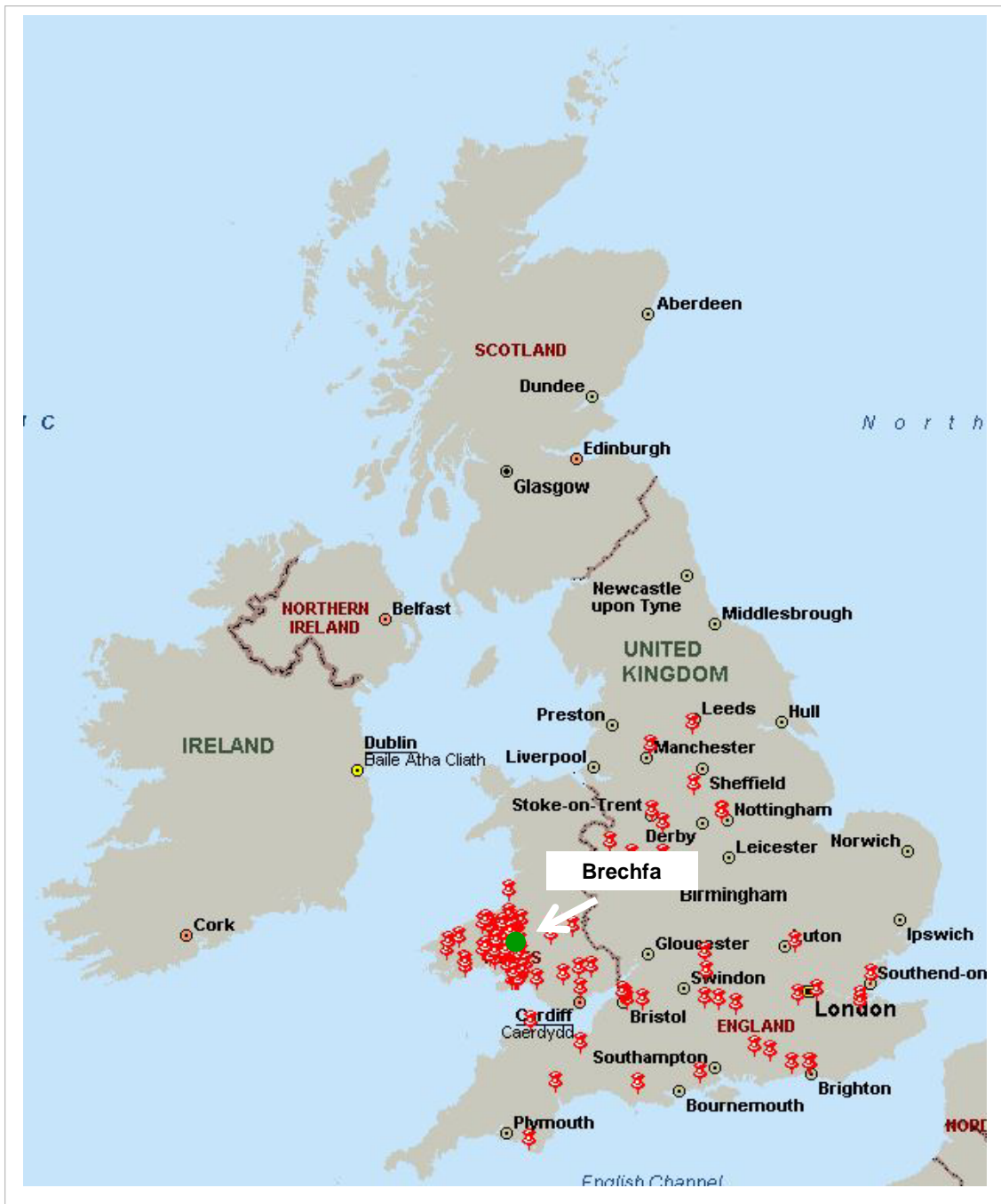
**Table 3: Visitor origin 2013**

		Brechfa	All Wales
		%	%
<b>Home region</b>	North Wales	-	23
	Mid / West Wales	53	14
	South West Wales	10	11
	Valleys	1	2
	South East Wales	1	7
	Outside of Wales	34	43
<b>Home nation</b>	Wales	66	57
	England	32	40
	Rest of UK	-	<1
	Abroad	1	1
	Refused	1	2

Base: All visitors – Brechfa (138); All Wales (1,114)



Figure 4: Map of visitor origin for Brechfa



### 4.3 Frequency of visits

#### 4.3.1 First-time visitors

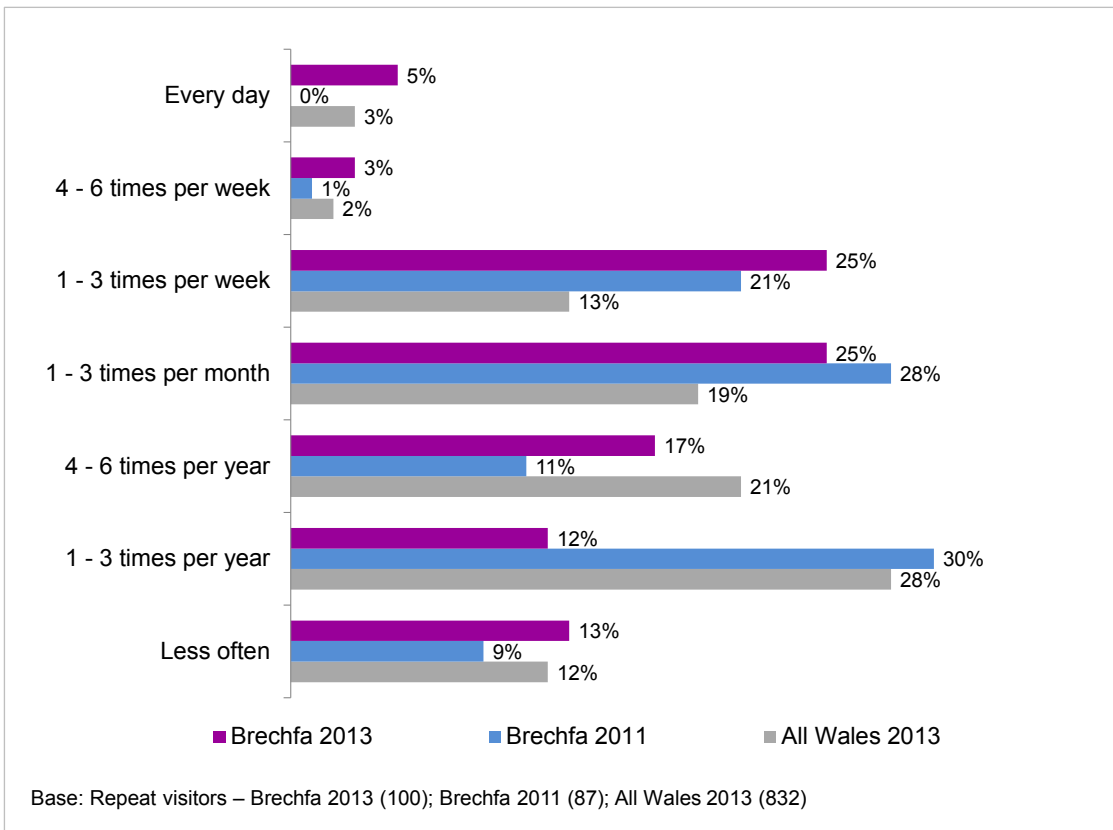
In 2013 only 28% of visitors to Brechfa were first-time visitors. This was consistent with the all Wales average of 25% who said they had never visited their respective forest sites before.

#### 4.3.2 Repeat visitors

Focussing on repeat visitors (72% of the sample), it can be seen that larger proportions going to Brechfa tended to be more regular visitors compared to the overall Welsh average. A third visited at least weekly (33%) compared with the Welsh average of 18%.

Compared with the 2011 Brechfa study, there was a marked decrease in the proportion of those visiting 1-3 times a year (12%) compared with the 2011 study and all Wales figures (30% and 28% respectively) – see Figure 5 below.

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



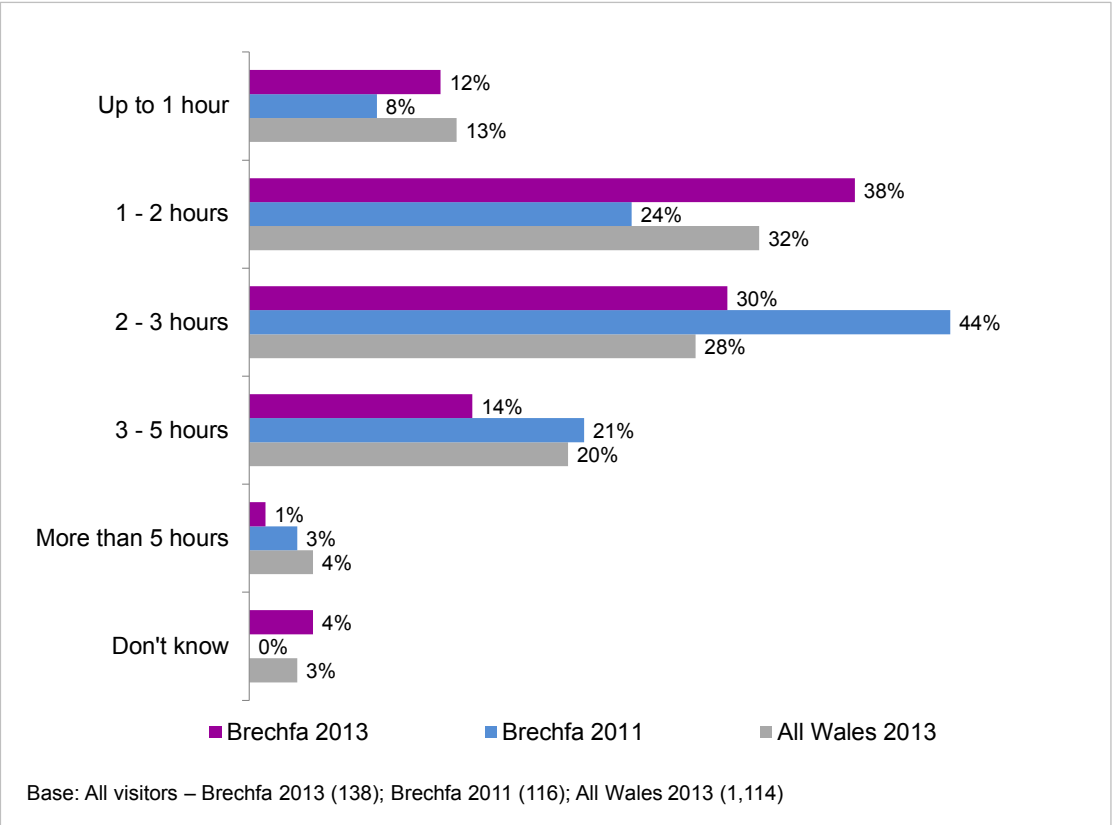
#### 4.4 Length of visit

Visitors stayed at Brechfa for an average of 2 hours and 7 minutes in 2013. This was 24 minutes less than the comparable Brechfa study in 2011 (2 hours and 31 minutes) and 15 minutes less than the average length of stay across all sites in Wales in 2013 (2 hours and 22 minutes).

Visitors stayed for shorter times at Brechfa in 2013 than in 2011. Half (50%) stayed up to 2 hours in 2013 compared with only 32% in 2011.

The largest proportion of visitors stayed between 2-3 hours at Brechfa in 2011 (44%): this had reduced to 30% in 2013 – 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.

By far the most popular activity at Brechfa was cycling (77%) - the all Wales figure was only 22%. Cycling was most popular on forest roads, tracks or trails (72%). There was also cycling / mountain biking off trail or track (17%).

Nearly a third of visitors to Brechfa were involved in walking activities (28%), but this was a lot less than the all Wales percentage for walking activities (73%). At Brechfa, walking on a signposted trail was the most popular (20%) followed by dog walking (18%) – see Table 4 overleaf.

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

	Brechfa 2013 %	Brechfa 2011 %	All Wales 2013 %
Cycling on forest roads, tracks or trails	72	81	19
Cycling / mountain biking off trails or tracks	17	11	8
<b>TOTAL CYCLING</b>	<b>77</b>	<b>84</b>	<b>22</b>
Walking on a sign-posted trail	20	13	48
Dog walking	18	11	30
Walking but not following sign-posts	2	3	22
<b>TOTAL WALKING</b>	<b>28</b>	<b>20</b>	<b>73</b>
Admiring the views	12	1	22
Picnic or barbeque	7	2	15
Photography	4	2	8
Bird watching	4	-	4
Camping	2	-	22
Using the café / restaurant / other catering	2	-	7
Seeing something in the forest	1	-	3
Nature / natural history visit	1	2	3
Running / jogging	1	1	3

Base: All visitors – Brechfa 2013 (138); Brechfa 2011 (116); 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 was equally popular with both adults only (74%) and adults with children (80%).

Four fifths (80%) of visitors from England cycled, or intended to cycle when coming to Brechfa.

## 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. Please note that the data on time spent walking in Brechfa in 2011 was not available.

Visits to Brechfa lasted on average 2 hours and 7 minutes. Those cycling averaged 2 hours and 22 minutes whilst walkers spent on average about an hour less doing this activity (1 hour 26 minutes) – see Table 5 below.

**Table 5: Q7 – Time spent taking part in cycling and walking at Brechfa (Actual respondents only)**

	Total duration of visit		Time spent on any walking		Time spent on any cycling	
	2013	2011	2013	2011	2013	2011
Up to 30 minutes	4	1	11	-	2	-
31 – 60 minutes	9	7	26	-	2	2
1 – 2 hours	38	24	34	-	41	24
2 – 3 hours	30	44	20	-	34	45
3 – 5 hours	14	21	3	-	20	25
5+ hours	1	3	-	-	2	4
<b>AVERAGE</b>	<b>2 hrs 7 mins</b>	<b>2 hrs 31 mins</b>	<b>1hr 26 mins</b>	<b>-</b>	<b>2 hrs 22 mins</b>	<b>2 hrs 31 mins</b>

Base: all visitors (138); respondents who walked (**35**); respondents who cycled (104) – **NB small base size**

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

Visitors to Brechfa 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. Please note that mean scores include 'zero' responses.

Half the visitors claimed that they would spend up to £5 in the area as a result of their trip (49%), and a third (33%) said they would spend £6 - £10.

Of the remaining 19%, 8% said they'd spend £11-£20, 7% - £21-£50 and 4% £51+.

The average spend in the area as a result of visiting Brechfa was £10.13, significantly higher 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**

	Brechfa 2013 %	Brechfa 2011 %	All Wales 2013 %
£0 - £5	49	65	75
£6 - £10	33	6	12
£11 - £20	8	4	6
£21 - £50	7	6	3
£51+	4	21	3
<b>AVERAGE</b>	<b>£10.13</b>	<b>Not provided</b>	<b>£7.23</b>

Base: All visitors – Brechfa 2013 (138); Brechfa 2011 (116); All Wales 2013 (1,114)

When looking at individual types of spending, the item that the highest proportion of visitors to Brechfa were likely to spend anything on was transport (86%). At an average of £12.71 this was almost twice the all Wales average spend on transport of £6.83.

The other major area of spend was on food and drink purchased outside of any accommodation, with nearly half (49%) of the visitors to Brechfa likely to spend on it. The average proposed spend of £11.51 was higher than the all Wales average of £9.22.

Around one in ten (12%) said they would be spending on accommodation (including food and drink purchased there) – see Table 7 below.

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

	Proportion of visitors to Brechfa spending anything on this item %	Average £ Brechfa 2013	Average £ All Wales 2013
Transport including petrol, taxis, public transport	86	12.71	6.83
Food and drink purchased outside any accommodation	49	11.51	9.22
Accommodation, including food and drink purchased there	12	14.35	15.65
Non-routine shopping	2	0.39	0.95
Other miscellaneous items	1	0.26	0.90
Admissions fees to attractions	-	-	0.43
Parking	-	-	0.64
Hiring equipment e.g. boats, bikes or horses	-	-	0.27

Base: All visitors – Brechfa 2013 (138); All Wales 2013 (1,114) – NB 2011 data not available



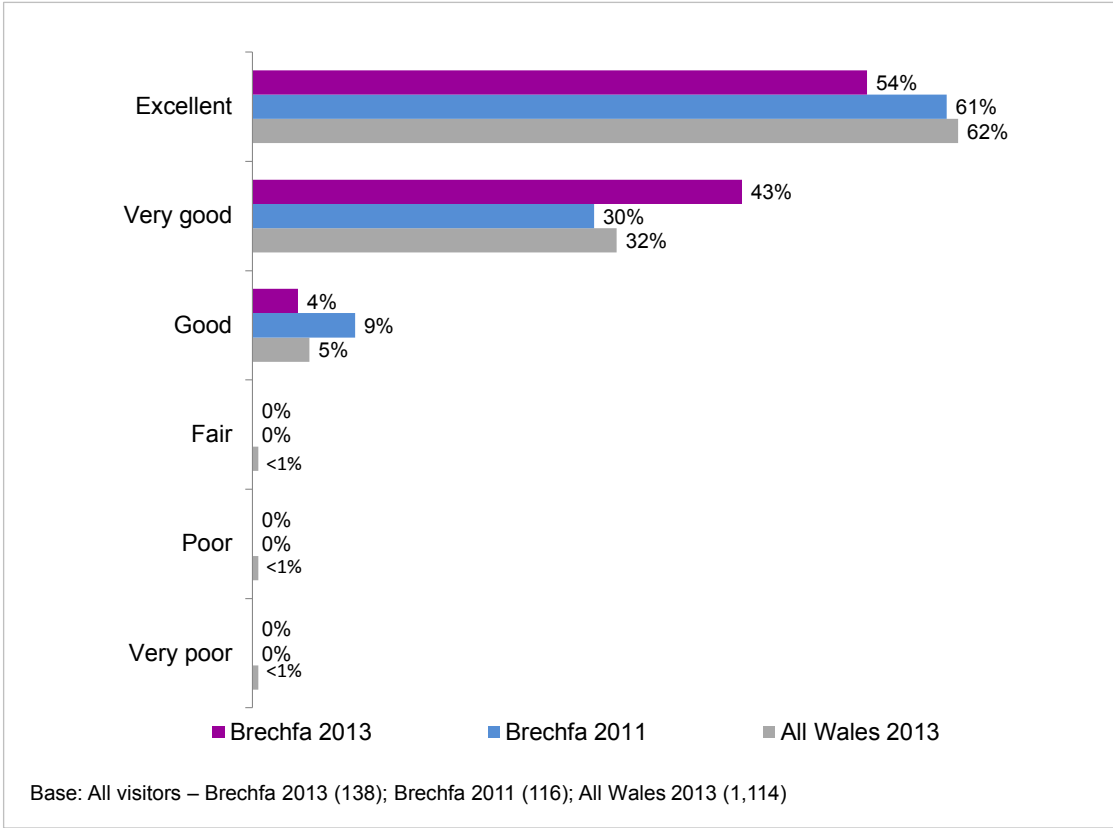
## 5. Perceptions of the site

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

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

Over half (54%) rated the site as ‘excellent’. This was a little lower than the comparative 2011 Brechfa study (61%) and the all Wales average (62%). However, when the ‘excellent’ and ‘very good’ scores were combined, the 2013 Brechfa score became 97%, compared with the 2011 score of 91% and an all Wales score of 94% - 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

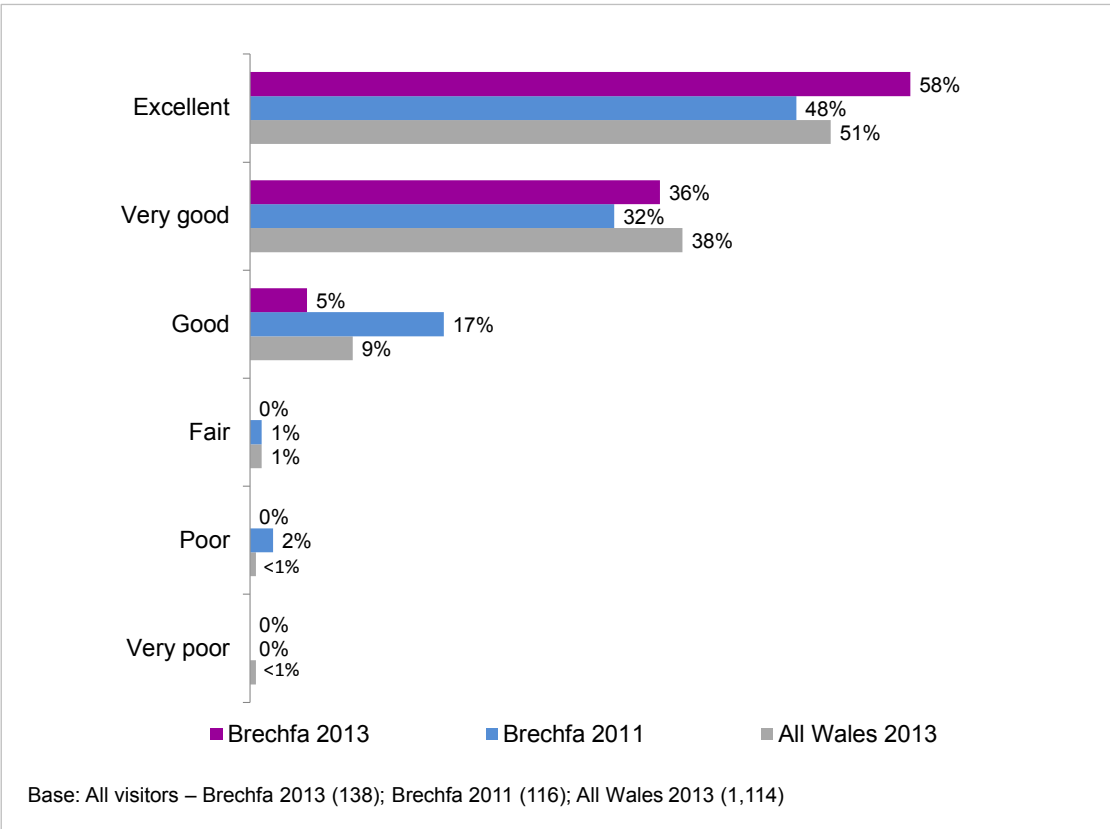
Similarly, ratings of how safe and welcoming the site was were also very positive. This was also the case across all Welsh sites, and was found in the previous study in 2011.

Over half the visitors to Brechfa gave this measure an 'excellent' rating (58%), compared to 48% in 2011, and 51% across all Wales.

Another 36% gave a 'very good' rating for how safe and welcoming Brechfa felt (compared to 32% in 2011 and 38% across all Welsh sites).

Only a very small proportion gave a 'good' rating (5%). None of the visitors interviewed at Brechfa gave a rating lower than this - 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 below details the comments provided by 2% or more of the sample at Brechfa, and shows the responses received from those visitors giving a positive rating (excellent, very good, good) for both Brechfa and all Wales sites.

Brechfa was considered to have had a good provision of paths / trails and tracks by over a quarter (26%) of those interviewed. This was double the all Wales figure of 13%.

It was also viewed as a safe environment generally for all people (18%) whilst 6% considered Brechfa to be peaceful / pleasant / tranquil / relaxing – see Table 8 below for more details on the comments provided.

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

	Brechfa 2013 %	All Wales 2013 %
General positive comments	44	14
Good provision of paths / trails and tracks	26	13
Safe environment generally for all people	18	18
Peaceful / pleasant / tranquil / relaxing	6	11
The scenery / views / beautiful environment	5	14
Never had any problems	4	4
Been before / familiar with it	3	3
Well signposted / good maps / info boards	2	9
Dog friendly	2	2
Live locally / convenient / easy to get to	2	4

Base: Visitors rating the site as excellent, very good or good – Brechfa 2013 (137); All Wales 2013 (1,085)

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

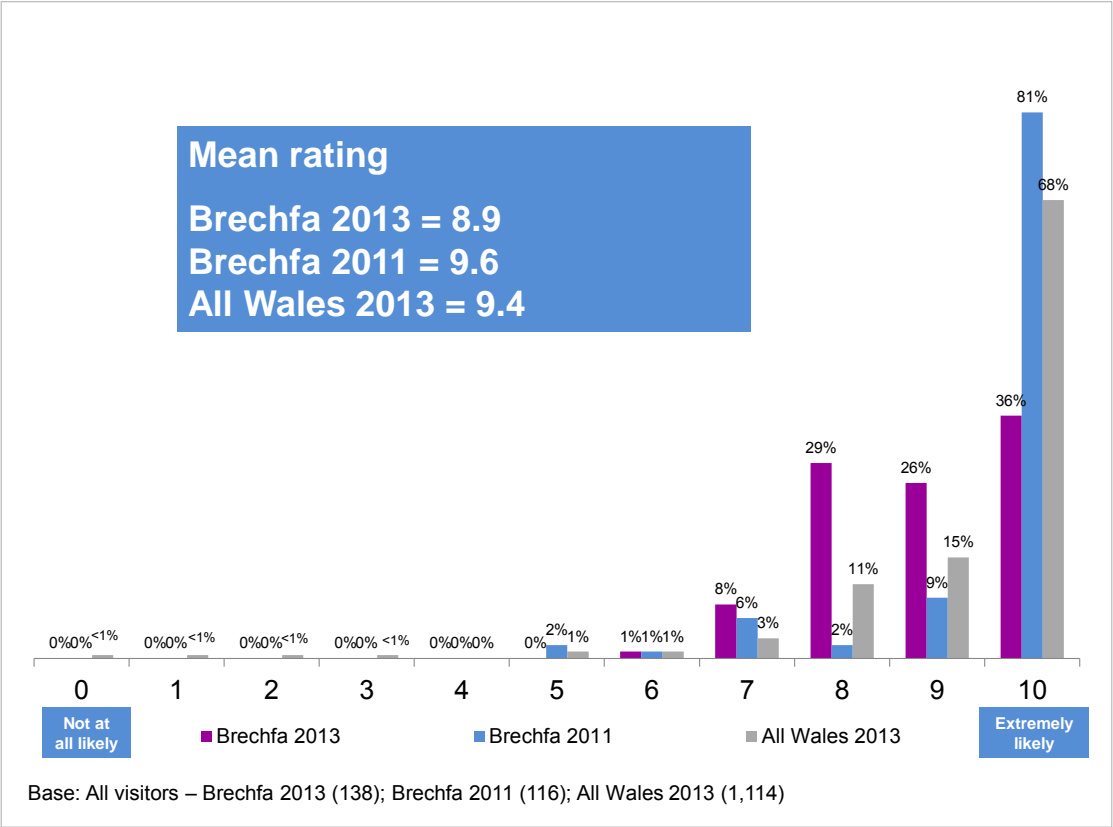
Visitors were asked whether they would be likely to recommend Brechfa as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Brechfa and all Wales sites in general were very positive. Only 1% gave a score of less than 7/10.

However, the proportion who gave a rating of 10/10 had fallen considerably since the 2011 study when it stood at 81%, In 2013 this had decreased to only 36%, which was also considerably lower than that of all Wales (68%).

This was reflected in the mean scores, with Brechfa 2013 standing at 8.9, compared with Brechfa 2011 at 9.6 and all Wales at 9.4 – see Figure 9 below.

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



Looking at the various sub-groups, younger males gave less 10 scores than others for Brechfa in 2013. i.e.:

- By age: particularly low in the 16-34 age group, where only 27% had scored a 10 (although 10's were no higher than 41% across any of the age groups)
- By sex: males gave a score of 10 less often than females 34% v 41%
- Adults without children: only 33% gave a 10 compared with 48% of adults with children.

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 Brechfa is 61, which is considerably lower (by 26 points) than the score of 87 seen in 2011, and lower than the all Wales score of 79.

## 5.4 Favourite things about the site

Visitors to Brechfa 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 (compared to the previous research and the all Wales average).

The most mentioned favourite things related to 'peace / tranquillity / relaxation' (54%). This was comparable to the all Wales figure (51%).

Not surprisingly, over half of the visitors mentioned 'cycle trails / the opportunity to cycle' (52%).

The rest of the most mentioned favourite things at Brechfa (above 30%) referred to the outdoors, scenery and exercise:

- Scenery / views / beautiful (42%)
- Walks / paths / trails (39%)
- Exercise / keeping fit (37%)
- Fresh air / being outside (31%).

Almost a third liked Brechfa for being 'close to home / convenient' (28%). This was considerably higher than the all Wales figure of 15% - 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	Brechfa 2013 %	Brechfa 2011 %	All Wales 2013 %
Peace / tranquillity / relaxation	54	41	51
Cycle trails / opportunity to cycle	52	59	17
Scenery / views / beautiful	42	34	57
Walks / paths / trails	39	29	38
Exercise / keeping fit	37	9	15
Fresh air / being outside	31	9	16
Close to home / convenient	28	14	15
Like forests / trees / variety of trees	14	-	14
Clean / well looked-after	8	3	9
Plenty / cheap / good parking	8	-	5
Been before / wanted to come again	7	2	7
Activities for the children	6	-	6
Wildlife / bird watching	4	6	7
Safe environment	4	3	8
Opportunity to spend time with family / friends	4	3	5
Well laid out / good layout	4	-	1
The weather	2	-	4
Cost / value for money	2	2	3
Good accessibility	2	-	1
Challenging environment / wilderness	2	3	1

Base: All visitors – Brechfa 2013 (138); Brechfa 2011 (116); All Wales 2013 (1,114)

Some notable differences were observed between different sub-groups of the sample when it came to what was liked about the Brechfa site.

Cycle trails were mentioned more by:

- Males (56%) compared with females (38%)
- And the 16-34 age group (58%) compared with the 55+ age group (33%)

Females tended to mention aspects centred around scenery, tranquillity and walks more than males:

- Peace / tranquillity / relaxation - Females (69%) Males (50%)
- Scenery /views / beautiful - Females (66%) Males (36%)
- Walks / paths / trails - Females (55%) Males (35%)

Walks / paths / trails were mentioned more frequently by the ABC1 social group (45%) than C2DEs (32%).



## 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 could not think of anything that would add to their enjoyment and only made positive comments (32%). However this was significantly less than the all Wales figure of (47%).

The single most mentioned area for improvement was the provision of a café / catering / refreshments (14%).

Mentioned by around 1 in 10 were 'improve signage / better signs /maps' (9%) and 'improve toilets / more toilets / shower facilities' (9%).

The main general area where improvements were sought centred around the provisions for trails / paths and cycling in general:

- More trails / paths / cycle tracks (13%)
- Improve maintenance of paths / cycle tracks / better surfacing (7%)
- Longer trails / more challenging trails, paths and cycle routes (4%)
- More/ larger cycle racks/ storage /bike wash (4%)
- Bike shop /more shops (3%) - see Table 10 overleaf

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

	Brechfa 2013 %	All Wales 2013 %
Nothing / general positive comments	32	47
Provide café / catering / refreshments	14	5
More trails / paths / cycle tracks	13	5
Improve signage / better signs / maps	9	7
Improve toilets / more toilets / shower facilities	9	8
Improve maintenance of paths / cycle tracks / better surfacing	7	3
Longer trails / more challenging trails, paths and cycle routes	4	1
More bins / litter bins / recycling bins	4	5
More / larger cycle racks / storage / bike wash	4	1
Bike shop / more shops	3	<1
More activities for children / more play areas	2	2
More seating	2	2

Base: All visitors – Brechfa 2013 (138); All Wales 2013 (1,114)

When asked if there was anything that interfered with their enjoyment of the site, virtually everyone reported that nothing had interfered with their enjoyment (94%). This was considerably higher than the all Wales figure (79%).

Signage issues, poor site maintenance and problems with toilets were mentioned by 1% of the sample – see Table 11 below for more details.

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

	Brechfa 2013 %	All Wales 2013 %
Nothing	94	79
Signs unclear / need better signs	1	3
Poor maintenance of the site	1	2
Wet / windy / raining	1	2
Toilets – not enough / closed / out of order	1	2

Base: All visitors – Brechfa 2013 (138); All Wales 2013 (1,114)

## 6. Site facilities

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### 6.1 Importance of site facilities

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

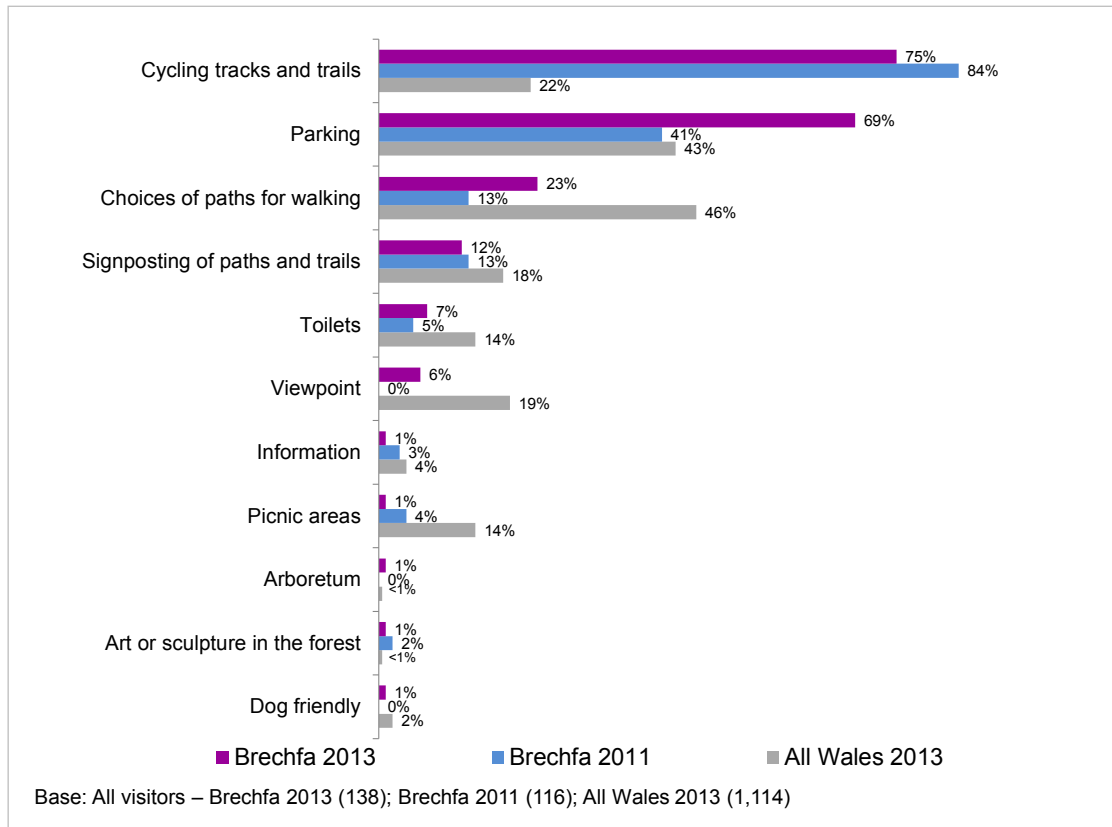
Not surprisingly, the cycling tracks and trails were mentioned by the highest proportion of visitors to Brechfa (75%). This figure was down from the previous Brechfa study in 2011 (84%).

Parking was viewed as almost as important to those visiting Brechfa (69%). This percentage was significantly higher than both the previous Brechfa study and the all Wales figures (41% and 43% respectively).

A choice of paths for walking was important to over one in five of the visitors (23%). This was higher than the findings from the last Brechfa study (13%) but significantly lower than the all Wales figure (46%).

Over one in ten felt that signposting of paths and trails was important (12%) – see Figure 10 overleaf for more details.

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



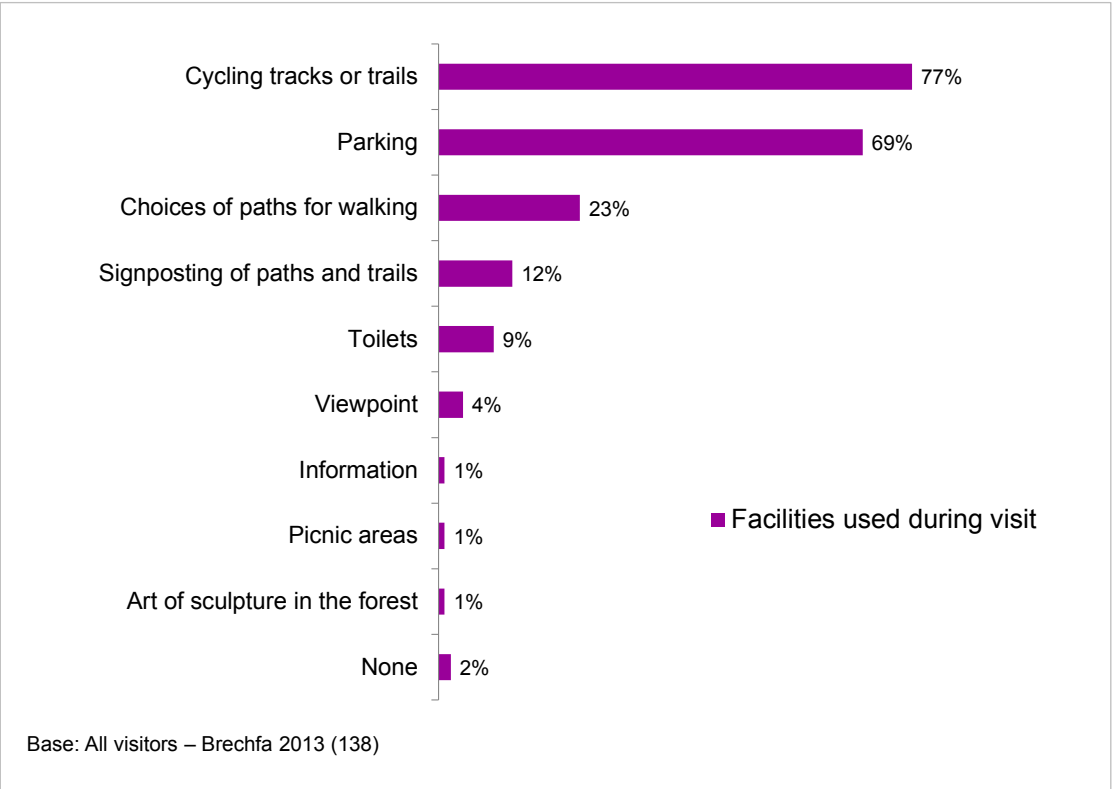
## 6.2 Facilities used

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

The facilities used reflect, to a large extent, visitors' views of the importance of facilities. Cycling tracks or trails were used by the highest proportion of visitors (77%), closely followed by parking (69%).

Paths for walking were used by around a quarter of visitors to Brechfa (23%), and around one in ten used the signposts (12%) and the toilets (9%) – for a full list see Figure 11 below.

**Figure 11: Q15a. Facilities used at Brechfa 2013**



A striking sub-group difference was that cycling tracks or trails were used much more by males (83%) than females (48%).

### 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 Brechfa have been detailed in Figure 12 below.

Ratings of all the facilities used were overwhelmingly positive with none of the visitors giving the facilities a ‘poor’ rating, and the vast majority giving a highly positive rating of either ‘excellent’ or ‘very good’.

The facility that received the highest score was parking. Virtually everyone (98%) rated the parking as ‘excellent’.

The remaining three facilities all received ‘excellent’ ratings from around three quarters of visitors. Cycle tracks or trails (79%), signposting of paths and trails (75%) and choices of paths for walking (72%) – see Figure 12 below for more details of the ratings given for each facility.

**Figure 12: Q15b. Rating of Brechfa site facilities (where used) 2013**

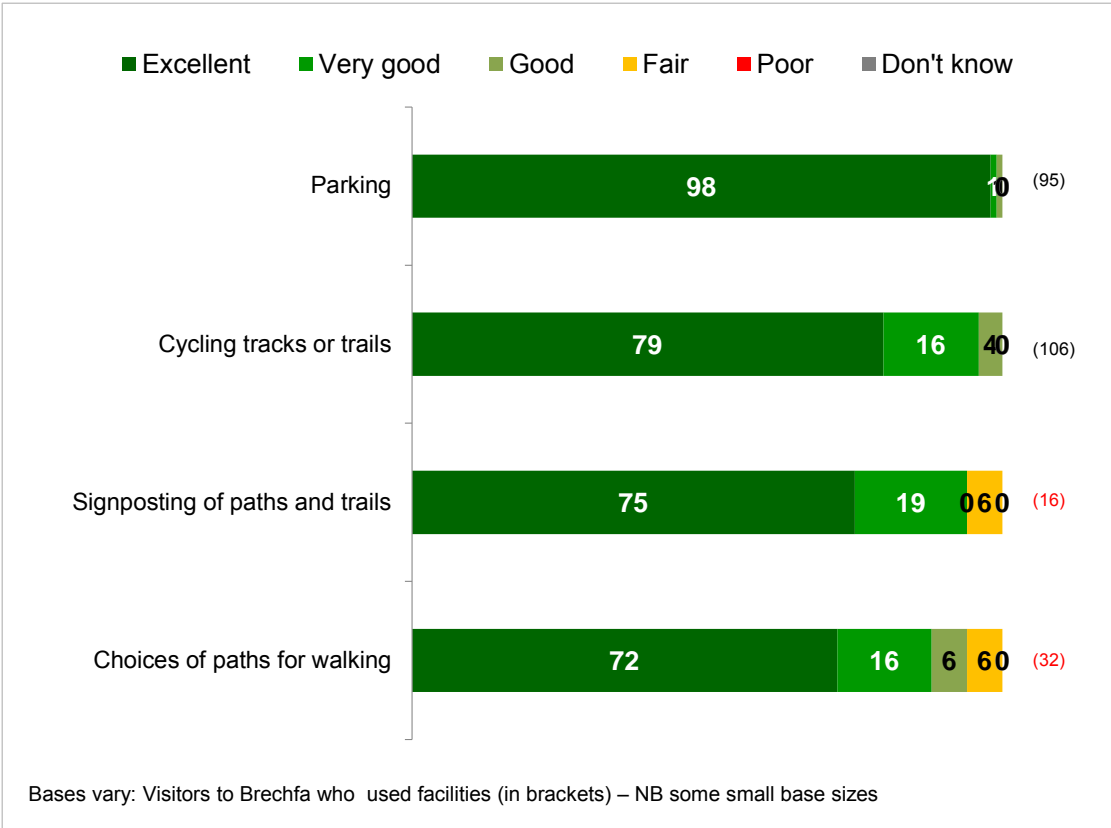


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2013 compared to 2011.

For all the facilities listed, the proportions who gave an 'excellent' rating increased markedly since the previous research, with the most significant increases seen in the proportions rating the parking, choices of paths for walking and signposting of paths and trails as 'excellent' (76%, 46% and 45% increases respectively) – see Table 12 below for more details.

**Table 12: Q15b – Proportions rating facilities at Brechfa as 'Excellent' 2013 vs. 2010**

Facilities	Brechfa 2013 %	Brechfa 2011 %	% change
Parking	98	22	<b>+76</b>
Cycling tracks or trails	79	56	<b>+23</b>
Signposting of paths and trails	75	30	<b>+45</b>
Choices of paths for walking	72	26	<b>+46</b>

Bases vary: visitors using each facility



## 7. Sources of information used to plan visit

Visitors were asked where they found out about Brechfa 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.

Approaching half the visitors heard about Brechfa via word of mouth (42%), and this was the most frequently mentioned source of information. The proportion who mentioned word of mouth had increased significantly since the 2011 Brechfa study (22%) and against the all Wales 2013 findings (24%).

The other most mentioned source of information was 'always known about it / been here before' (25%). This proportion had decreased significantly since the previous Brechfa study (58%), and against the all Wales 2013 findings (59%) – see Table 13 for more details.

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

Activities	Brechfa 2013 %	Brechfa 2011 %	All Wales 2013 %
Word of mouth	42	22	24
Always known about it / been here before	25	58	59
Google / internet	9	11	5
Sporting magazines	9	-	2
Mountain Biking Wales website	6	-	1
Live locally	6	-	2
Leaflet	4	1	2
Forestry Commission website	4	-	1
Just passing / en route	3	2	5

Base: All visitors – Brechfa 2013 (138); Brechfa 2011 (116); All Wales 2013 (1,114)

## 8. Visiting other areas and attractions

Visitors to Brechfa were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: virtually all visitors (99%) had visited at least one.

The three most visited attractions / areas (with around two thirds of those going to Brechfa also visiting these) were Byrgwm (73%), Carmarthen Town (68%) and Abergorlech (65%) – see Table 14 below for more details.

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


Attractions / Areas	Brechfa 2013	Brechfa 2011
	%	%
Byrgwm	73	33
Carmarthen Town	68	43
Abergorlech	65	47
Llandeilo Town	41	30
Afan Forest Park	38	57
Llandovery Town	30	35
Pembrey Country Park	30	31
Lampeter Town	28	35
Cwmcarn Forest	25	52
Pembrey Forest	23	23
Cwm Rhaedr Forest	22	22
Dinefwr Park	21	13
National Botanic Gardens	21	19
Gelli Aur Country Park	18	11
Carreg Cennen Castle	14	12
Talley Abbey	10	8
Keepers Lodge	9	8
Talley Forest	7	5
Dolaucothi Gold Mines	7	8
Gwarallt	3	6
Caio Forest	3	9
Cilgwyn	2	5
Penarthur	1	2
Pwll Bo	1	3
None of these	1	5

Base: All visitors – Brechfa 2013 (138); Brechfa 2011 (116)

# Appendix I

## Questionnaire

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  2 Museum Place, Cardiff, CF10 3BG	<u><b>B01326-1</b></u>  <u><b>NRW / FCE</b></u>  <u><b>Quality of Visitor Experience</b></u>  <u><b>FINAL questionnaire</b></u>  <b>BRECHFA</b> <b>(ABERGORLECH &amp; BYRGWM)</b>	<b>FOR OFFICE USE ONLY</b>		<b>INTERVIEWER RECORD</b> <b>WEATHER CONDITIONS (3-6m)</b>  <b>CAN MULTI-CODE</b> 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 <sup>st</sup> 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 1<sup>ST</sup> 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	
<b>Q6 – TOTAL HOURS SPENT</b>	1	2	3	4 5 6			7	8	(50)
<b>Q7 - READ OUT IF CODED AT Q4a</b>									
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					

<b>Q9</b>	What do you like most about the site? <b>PROBE</b> Anything else?	(70-73m)
<b>DO NOT PROMPT – CODE ALL MENTIONED</b>		
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 / 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) _____		X
Nothing		(74-77m)
Don't know		L
		M
<b>Q10</b>	What, if anything, would enhance your enjoyment of this site?	(78-81m)
<b>PROBE</b> Anything else?		
<b>RECORD VERBATIM</b>		
<b>IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</b>		
_____		
_____		
_____		
Nothing		L
Don't know		M
<b>Q11</b>	What, if anything, interfered with your enjoyment of this site today?	(82-85m)
<b>PROBE</b> Anything else?		
<b>RECORD VERBATIM</b>		
<b>IF MENTIONS WEATHER, PROBE FOR MORE DETAILS</b>		
_____		
_____		
_____		
Nothing		L
Don't know		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?

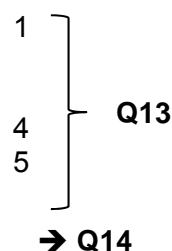
**CODE ALL MENTIONED**

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

(90)



(91-94m)

M

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  CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			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 \_\_\_\_\_ (212-217)
- Food and drink purchased outside any accommodation \_\_\_\_\_ (218-223)
- Admissions fees to attractions \_\_\_\_\_ (224-229)
- Parking \_\_\_\_\_ (230-235)
- Non-routine shopping (e.g. buying souvenirs) \_\_\_\_\_ (236-241)
- Transport including petrol, taxis, public transport etc. \_\_\_\_\_ (242-247)
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_ (248-253)
- Other miscellaneous items \_\_\_\_\_ (254-259)

**NOW GO TO  
 Q19**

**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 \_\_\_\_\_ (261-266)
- Food and drink purchased outside any accommodation \_\_\_\_\_ (267-272)
- Admissions fees to attractions \_\_\_\_\_ (273-278)
- Parking \_\_\_\_\_ (279-284)
- Non-routine shopping (e.g. buying souvenirs) \_\_\_\_\_ (285-290)
- Transport including petrol, taxis, public transport etc. \_\_\_\_\_ (291-296)
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_ (297-302)
- Other miscellaneous items \_\_\_\_\_ (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?

(355-358m)

**CODE ALL MENTIONED**

Keepers Lodge	1				
Gwarallt					2
Abergorlech					3
Byrgwm					4
Penarthur (near Llangadog)	5				
Cilgwyn (near Llangadog)	6				
Talley Forest					7
Pwll Bo (near Llanwrtyd Wells)		8			
Cwmrhaedr Forest (near Llandovery)			9		
Caio Forest (between Lampeter and Llandovery)				A	
Talley Abbey	B				
Dolaucothi Goldmines	C				
Dinefwr Park					D
Carreg Cennen Castle		E			
Gelli Aur Country Park		F			
National Botanic Gardens		G			
Llandeilo (town)	H				
Carmarthen (town)	I				
Llandovery (town)	J				
Lampeter (town)	K				
Pembrey Country Park					L
Pembrey Forest					M
Afan Forest Park (near Neath)			N		
(359)					
Cwmcarn Forest (near Caerphilly)			1		
None of these	L				
Don't know / can't remember		M			

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

**NO Q20 OR SHOWCARD K FOR THIS SITE!**

**ASK ALL**

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

**Q21 INTERVIEWER RECORD GENDER (603)**

- Male 1
- Female 2

**Q22** Which of the following age bands do you fall into? (604)

- 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 L**

**Q23** Which of these best describes your employment status right now? (605)  
**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.) (606)

**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

**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?  
**SINGLE CODE**

White British  
 White Welsh  
 White Irish  
 White East European 4  
 White other European 5  
 Any other White background (please specify) \_\_\_\_\_

Caribbean 6  
 African  
 Any other Black background (please specify) \_\_\_\_\_

Indian  
 Pakistani  
 Bangladeshi A  
 Any other Asian background (please specify) \_\_\_\_\_

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

Chinese

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

Refused

**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) \_\_\_\_\_

(609)

1  
2  
3

E

7  
F

8  
9

G

H

J

Z

(617-618)

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:	
			(621)(622)(623)(624)	
WRITE IN YOUR INTERVIEWER NUMBER →			(625)	(626)
			(627)	(628)
<b>B01326-1</b>	<b>F.O.U (BACK CHECKS)</b>		<b>Accompanied</b>	<b>Yes 1 No 2</b>
				<b>Supervisor signature</b>



## Appendix II

### Explanation of social class categories

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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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