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Research Report

Quality of the Visitor
Experience 2014

Bwlch Nant yr Arian



Prepared for:
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1. Executive summary

1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 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 190 visitor interviews conducted at Bwlch Nant yr Arian 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 Bwlch Nant yr Arian

Nant yr Arian Forest in the Cambrian Mountains sits high above Melindwr Valley with commanding views of Cardigan Bay and the Cambrian Mountains. Its nearest town or village is Ponterwyd. There is a red kite feeding project at the site with a partnership between the Forestry Commission, RSPB and the Welsh Kite Trust. The red kites are fed every afternoon which can be viewed from the café with a lakeside view. In the summer there are also representatives from the RSPB at the site.

Nant yr Arian Forest has a wide range of activities available to visitors from scenic walks including a lakeside and red kite trail, world class mountain biking, long climbs, eco-friendly visitor centre and café, adventure play areas, Animal Puzzle Trail and orienteering routes.

1.3 Perceptions of the site

Perceptions of Nant y Arian as a place to visit were very positive. This was also true across all Wales sites on average, and is consistent with the previous study conducted in 2011. Over six in ten visitors (61%) rated the site as excellent, which is in line with the 2011 survey (63%) and slightly higher than the all Wales findings (55%). Just over a third (35%) rated the site as very good and a further 3% said it was good.

Similarly, ratings of how safe and welcoming Nant y Arian were also very positive and remain unchanged since 2011. No-one gave a negative rating of the site, whilst over six in ten said it was excellent (62%), a third (36%) said it was very good and 2% said it was good.

When asked whether they would be likely to recommend Nant y Arian as a place to visit to a friend or relative (using a score of 0-10), the overall score for Nant y Arian was extremely positive at 9.4 out of 10, which matches the all Wales average. Although this was only marginally different to the score of 9.5 achieved in 2011, the proportion giving 10 out of 10 has dropped slightly in 2014, from 78% to 63%.

1.4 Strengths of the site

The main feature of Nant y Arian that stood out was the scenery, views, beautiful, natural environment (63%). This was an increase on 2011 where 43% mentioned this aspect and is higher than the all Wales average of 47%. Other favourite aspects of Nant y Arian included wildlife or bird watching (44%), peace, tranquillity, relaxation (35%) and the walks, paths and trails (29%).

1.5 Areas for improvement

Six in ten of visitors to Nant y Arian could not think of anything that would add to their enjoyment and only made positive comments (61%). This was much higher than the all Wales average (46%).

The most frequently mentioned improvement related planting more trees (6%): this was only mentioned by 1% of visitors across all Wales sites. Another 4% wanted longer opening hours of the café or the main gates, while 3% mentioned better parking, more trails or an improvement to the café / catering.

1.6 Visitor profile

Over three-quarters of visitors to Bwlch Nant y Arian in 2014 were repeat visitors (76%) and less than a quarter (24%) had never been before. This represents a rise in repeat visitors since 2011, when 67% had visited before, and is also slightly higher than the all Wales average of 71%. Typically across Wales 65% of visitors were 'day trippers' and 34% were staying visitors, whereas at Nant y Arian the visitor type was slightly different with half of visitors on a day trip (49%) and half staying over (50%).

Day trippers were fairly evenly split between those who had travelled less than 3 hours (27%) and those who had travelled 3 hours or more (22%). Staying visitors were much more likely to be on a longer holiday away from home (38%) than on an overnight stay (12%).

The average group size at Nant y Arian was 3.1 people, which is similar to the all Wales average of 3.3 people.

The demographic profile of at Nant y Arian was largely similar to the all Wales average, other than site visitors being slightly older and therefore slightly more likely to be retired and less likely to have children (compared to all Wales). The gender profile was fairly even with just over half of visitors being male (52%) and just under half being female (48%).

As mentioned, Nant y Arian visitors tended to be slightly older than all Wales visitors, with a third (33%) being aged under 45 and two thirds (68%) aged over 45: across all Wales visitors, 42% were aged under 45 and 58% were aged 45+. Furthermore at Nant y Arian, 27% of visitors were aged 65+ compared with 17% all Wales average.

Over half of visitors to Nant y Arian worked full time (53%) and a further 13% worked part time. This was also in line with the all Wales data; the main difference at Nant y Arian was that more visitors were retired (26%) compared to the all Wales average (19%).

As found across all Wales sites, visitors tended towards the ABC1 socio-economic groups (professional and non-manual workers = 68%) than the C2DE groups (skilled and unskilled manual workers and the unemployed = 32%). A little over a quarter (28%) of Nant y Arian visitors had children in the household, which was slightly lower than the all Wales figure (34%).

In line with all sites, the majority of visitors to Nant y Arian were White British/Welsh/Irish (97%), with only a small number of visitors describing their ethnicity as 'White other nationality' (1%) or 'Black / Asian / Mixed' (2%).

2. Introduction

2.1 Background

The woodland estate managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) covers some 105,000 hectares and 256,000 hectares respectively. 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, woodlands and National Nature Reserves. 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 forests, woodlands and National Nature Reserves 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
TOTAL	1,654	TOTAL	1,154

* 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 Nant yr Arian, interviewing took place between 29th March and 28th October, and a total of 190 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Nant yr Arian 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

3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Bwlch Nant y Arian. 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 Bwlch Nant y Arian was largely in line with that of the visitors to all the Wales sites.

As across all Wales visitors, the gender profile was fairly even with just over half of visitors being male (52%) and just under half being female (48%).

In terms of age, the Nant y Arian visitors tended to be slightly older than all Wales visitors, with a third (33%) being aged under 45 and two thirds (68%) aged over 45: across all Wales visitors, 42% were aged 16-44 and 58% were aged 45+. Furthermore at Nant y Arian, 27% of visitors were aged 65+ compared with 17% all Wales average.

Over half of visitors to Nant y Arian worked full time (53%) and a further 13% worked part time. This was also in line with the all Wales data; the main difference at Nant y Arian was that in line with the slightly older age profile, more visitors were retired at (26%) than the all Wales average (19%).

As found across all Wales sites, visitors tended towards the ABC1 socio-economic groups (professional and non-manual workers = 68%) than the C2DE groups (skilled and unskilled manual workers and the unemployed = 32%). However, slightly more C2s (skilled manual workers) visited Nant y Arian (20%) than across Wales, whilst slightly less at Nant y Arian were in social grade AB (31%) than average.

Around a quarter (28%) of Nant y Arian visitors had children in the household, which was slightly lower than the all Wales figure (34%).

The overwhelming majority of visitors to Nant y Arian were White British / Welsh / Irish (97%), with only a small number of visitors describing their ethnicity as 'White other nationality' (1%) or 'Black / Asian / Mixed' (2%).

Just over a fifth of visitors to Nant y Arian spoke Welsh (22%); 12% fluently and 9% non-fluently which matches the all Wales visitor 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

		Nant yr Arian %	All Wales %
Gender	Male	52	53
	Female	48	47
Age	16 – 24	2	3
	25 – 34	13	16
	35 – 44	18	23
	45 – 54	24	23
	55 – 64	17	17
	65+	27	17
	Refused	-	<1
Social class	AB	31	38
	C1	37	34
	C2	20	15
	DE	12	12
	Refused	1	1
Working status	Full-time employee (30+ hours per week)	53	56
	Part-time employee (<30 hours per week)	13	10
	Self-employed	2	7
	Full-time education	1	1
	Unemployed	1	1
	Permanently sick / disabled	3	2
	Retired	26	19
	Looking after home	2	2
	Other	-	<1
	Refused	-	1
Limiting illness	Yes – limited a lot	6	4
	Yes – limited a little	5	5
	No	85	90
	Refused	4	1
Children in household	Yes	28	34
	No	72	66
	Refused	-	<1
Ethnicity	White – British / Welsh / Irish	97	96
	White – Other	1	3
	Black / Asian / Mixed	2	1
	Refused	-	<1
Welsh speaker	Yes	22	22
	No	78	78

Base: All visitors – Nant yr Arian (190); All Wales (1,154)

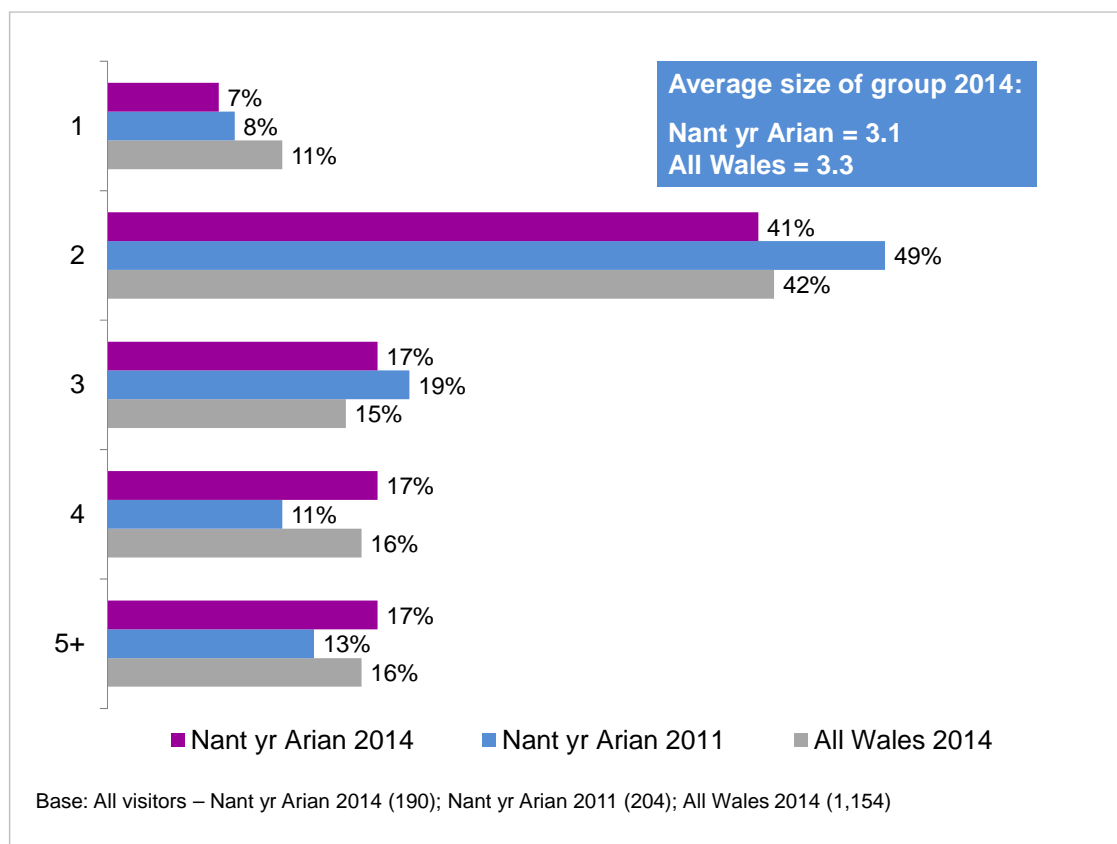
3.2 Group profile

3.2.1 Size of group

The average group size at Nant y Arian was 3.1 people, which is similar to the all Wales average of 3.3 people.

Group sizes at Nant y Arian were very similar to 2011 and to the all Wales average, with more people visiting in a group of two, than any other combination (41%): only 7% visited alone.

Figure 1: Q1. Total size of the group

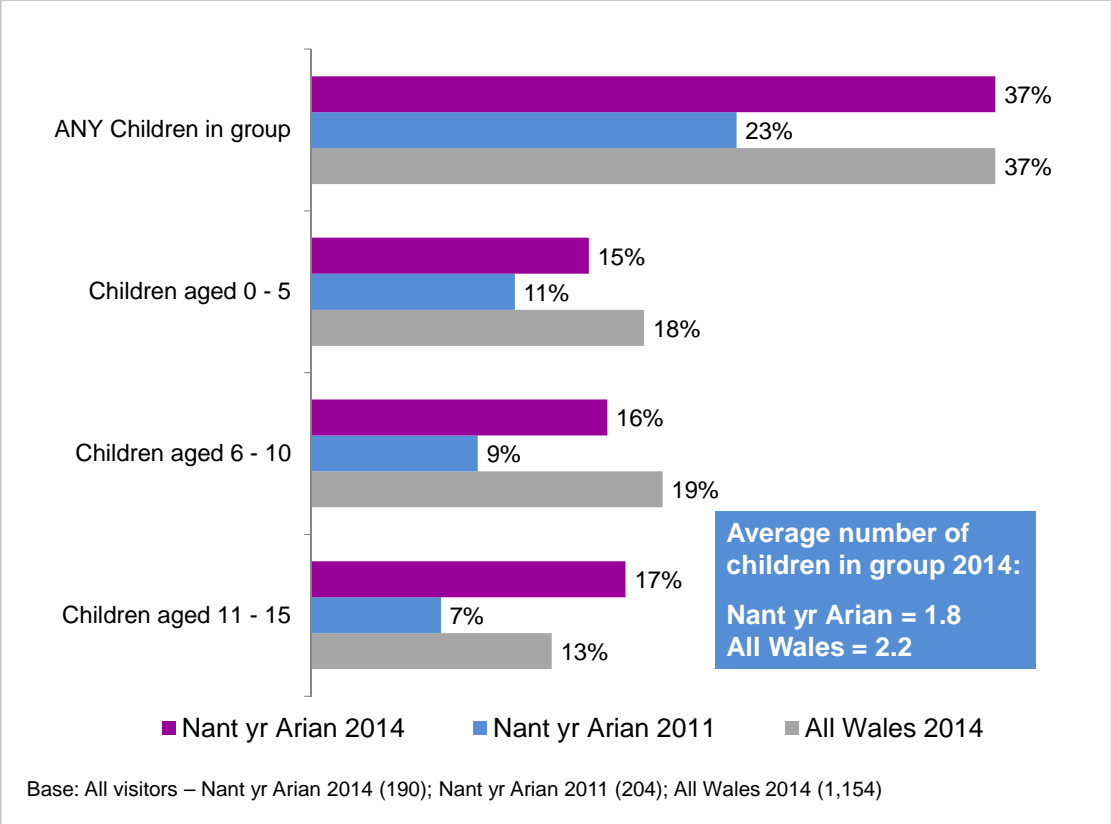


3.2.2 Composition of group

Almost four in ten visitors to Nant y Arian were there with a child (37%), which is the same as the all Wales average, and represents an increase of 14 per cent points since the 2011 research.

Children visiting Nant y Arian were very evenly split between the age ranges, which is slightly different to 2011, when the children tended to be a little younger.

Figure 2: Q1. Composition of group



4. Profile of visit

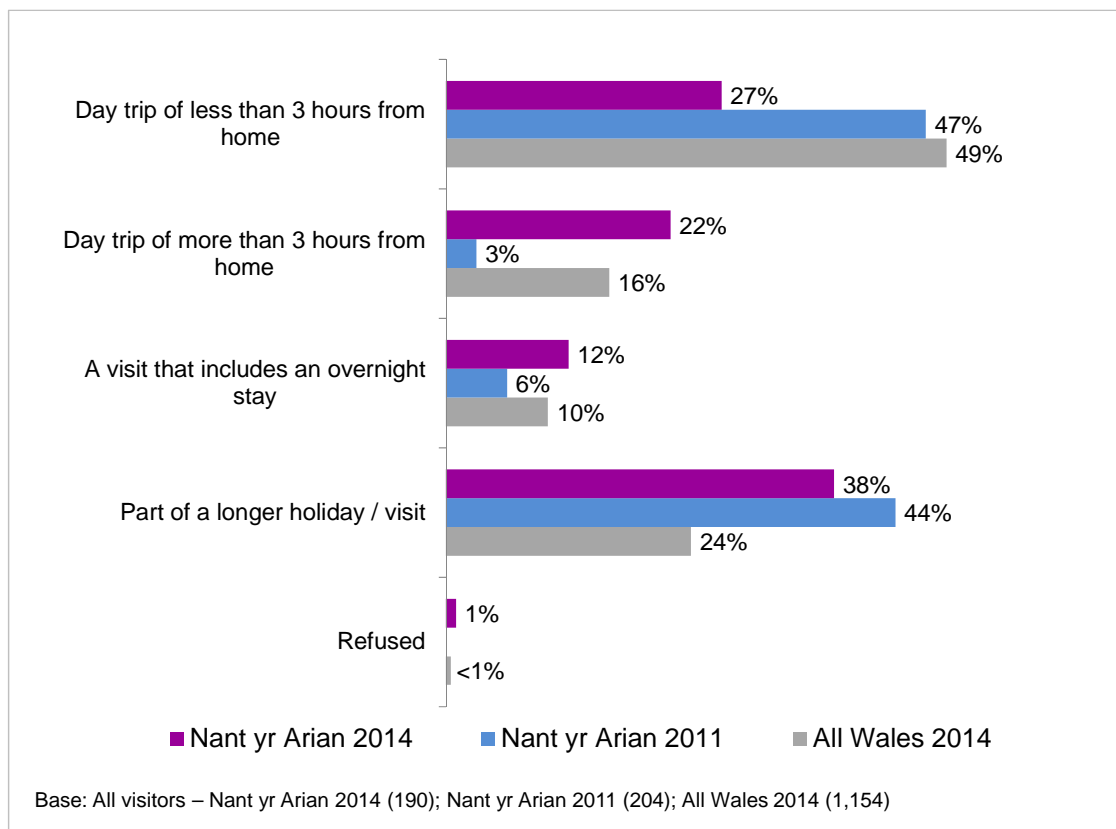
4.1 Type of visit

Typically across Wales, 65% of visitors were 'day trippers' and 34% were staying visitors: at Nant y Arian the visitor type was slightly different, with half of visitors on a day trip (49%) and half staying over (50%).

Looking at day trippers, they were fairly evenly split between those who had travelled less than 3 hours (27%) and those who had travelled 3 hours or more (22%). Staying visitors were much more likely to be on a longer holiday away from home (38%) than on an overnight stay (12%).

In 2011 a similar proportion to 2014 were day trippers and staying visitors, but most of the day trippers back then were on a short, under 3 hour trip from home (47% of all visitors).

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.

Well over half of visitors to Nant y Arian came from England (56%) with a further 1% visiting from outside the UK. Most of the Wales-based visitors to Nant y Arian came from Mid / West Wales (82% of Welsh visitors, or 35% of all visitors). See Table 3 below and Figure 4 overleaf.

Table 3: Q28b. Visitor origin 2014

		Nant yr Arian %	All Wales %
Home region	North Wales	5	20
	Mid / West Wales	35	21
	South West Wales	3	5
	Valleys	-	10
	South East Wales	1	5
	Outside of Wales	57	40
Home nation	Wales	43	60
	England	56	38
	Rest of UK	-	<1
	Abroad	1	2
	Refused	-	<1

Base: All visitors – Nant yr Arian (190); All Wales (1,154)

Figure 4: Map of visitor origin for Nant yr Arian



4.3 Frequency of visits

4.3.1 First-time visitors

Over three-quarters of visitors to Nant y Arian in 2014 were repeat visitors (76%) whereas less than a quarter (24%) had never been before. This represents a rise in repeat visitors since 2011, when 67% had visited before, and is also slightly higher than the all Wales average of 71%.

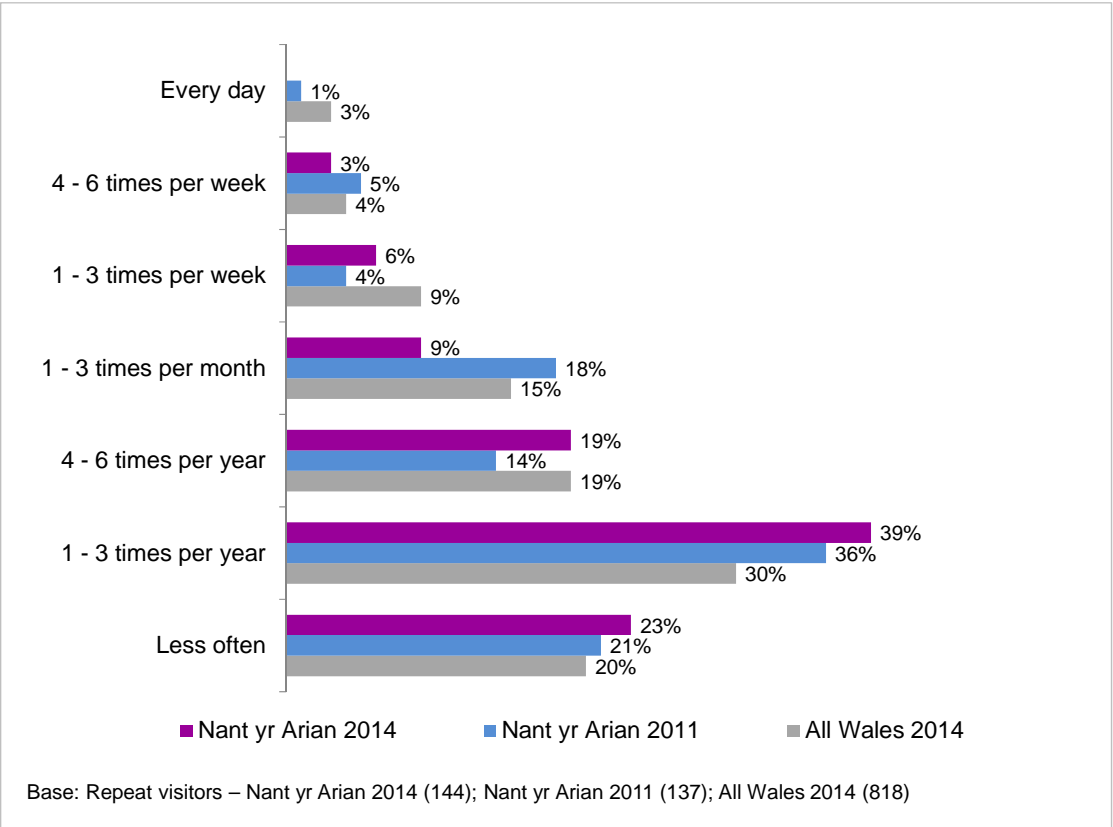
4.3.2 Repeat visitors

Focussing on repeat visitors, most visitors to Nant y Arian were infrequent, with only 18% of visitors visiting monthly or more often, and the vast majority visiting less often than once a month (81%).

This represents a decrease in visiting frequency since 2011, when 28% were more regular visitors (coming to the site at least once a month) and 71% were more infrequent.

In comparison to the all Wales average, visitors to Nant y Arian in 2014 visited less often than average, where typically 31% visited at least once a month and 69% visited less often.

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

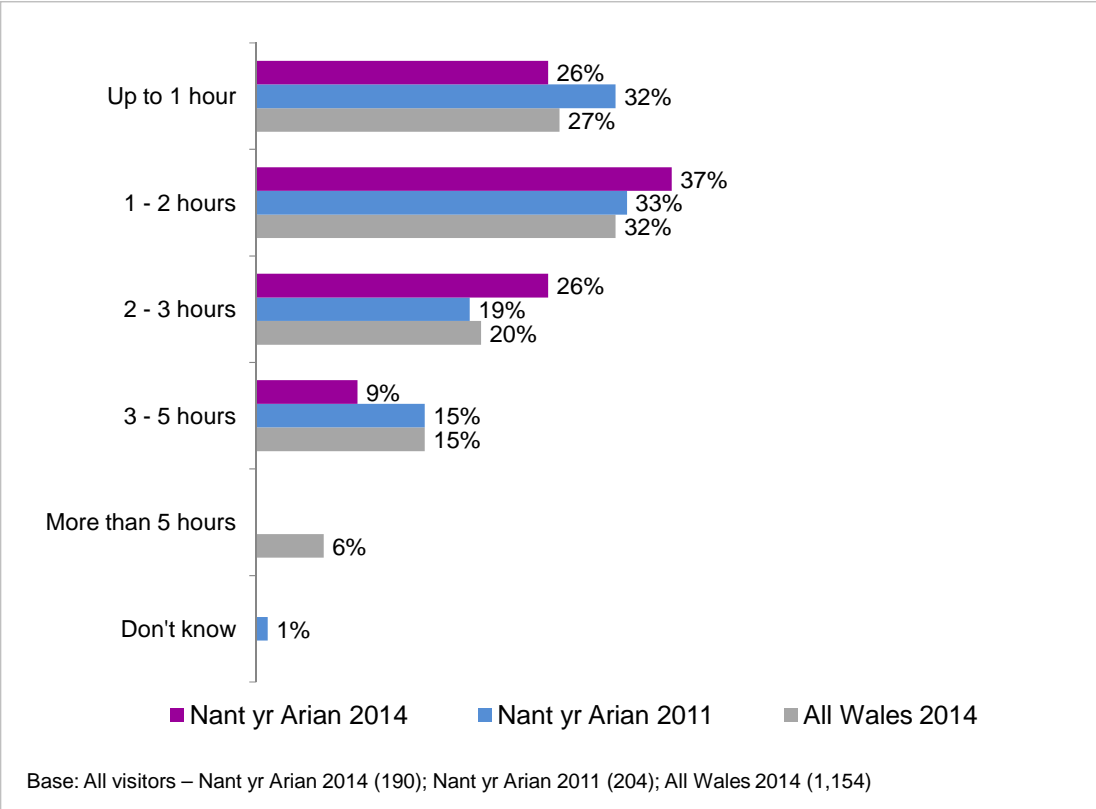


4.4 Length of visit

Visitors to Nant y Arian were at the site for 1 hour and 50 minutes on average, a very similar length of time to 2011 (1 hr 46 mins). The average length of stay across all sites in Wales was slightly longer at 2 hours and 7 minutes.

Figure 6 below details the visit durations by time brackets and shows that the most common length of visit to Nant y Arian was 1-2 hours, and that no-one stayed for over 5 hours:

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 'active' activity at Nant y Arian was walking generally (62%), which is virtually unchanged since 2011 (61%) and is in line with the all Wales average (69%). At Nant y Arian, as with all the Wales sites, using sign-posted trails was the most popular mode of walking (32%) although this represents a drop from 51% in 2011, and has been replaced by an increase in dog walking: up to 25% from 16%.

Cycling was undertaken by 16% of visitors, meaning in total 73% took part in some form of active activity (there is overlap between walking and cycling i.e. visitors could take part in both). Activities undertaken at Nant y Arian were therefore slightly more passive than across Wales in general, where 87% took part in an active pursuit.

The most popular 'passive' activity at Bwlch Nant y Arian in 2014 remains using the cafe/restaurant, which three-quarters of visitors had done this year (75%), compared with a similar 70% in 2011. This is much higher than the all Wales average of 33%, although of course not all sites have eating facilities.

Other popular activities at Nant y Arian included admiring the views (47% up from 19% in 2011), bird watching (44% up from 34%) and using the visitor centre/shop (34%, up from 20%). In 2011, one of the most popular activities was feeding the birds/ducks (31%), but the recent survey found only 3% had taken part in this.

The proportion using the play area had increased from 10% to 18% in 2014.

In summary, the proportion taking part in active activities at Bwlch Nant y Arian remains unchanged since 2011, but there have been some variations in the types of activity undertaken – see Table 4 overleaf.

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

	Nant yr Arian 2014 %	Nant yr Arian 2011 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	10	13	15
Cycling off trails or tracks	9	4	11
TOTAL CYCLING	16	16	22
Walking on a sign-posted trail	32	51	42
Walking but not following sign-posts	14	8	12
Dog walking	25	16	30
TOTAL WALKING	62	61	69
Using the café / restaurant / other catering	75	70	33
Admiring the views	47	19	26
Bird watching	44	34	15
Using the Visitor Centre or shop	34	20	14
Using the play area	18	10	15
Photography	17	18	11
Picnic or barbeque	13	5	17
Nature / natural history visit	7	5	7
Feeding the birds / ducks / kites	3	31	
Seeing something in the forest	3	1	2
Organised trip / event	2	-	2
Running / jogging	1	2	3
A forest drive	1	-	2
Looking for wildlife / plants / animals	1	-	
Other	4	5	2
Taken part in ACTIVE activities	73	72	87

Base: All visitors – Nant yr Arian 2014 (190); Nant yr Arian 2011 (204); 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 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 (24), this has not been commented on.

As previously mentioned, visits to Nant y Arian lasted 1 hour and 50 minutes on average which was very similar to 2011 (1 hour 46 minutes). However, there has been a decrease in the amount of time spent walking as part of the visit, which walkers now spend on average 49 minutes doing: this is 24 minutes less than in 2011.

Table 5: Q5/Q6. Time spent taking part in walking at Nant yr Arian (Actual respondents only)

	Total duration of visit		Time spent on any walking	
	2014	2011	2014	2011
Up to 30 minutes	7	14	41	19
31 – 60 minutes	19	18	31	32
1 – 2 hours	37	33	24	34
2 – 3 hours	26	19	2	11
3 – 5 hours	9	15	1	3
5+ hours	2	-	-	-
Don't know	-	1	2	1
AVERAGE	1 hrs 50 mins	1 hr 46 mins	49 mins	1 hr 13 mins

Base: All respondents - 2014 (190); 2011 (204) Respondents who walked - 2014 (113); 2011 (114)

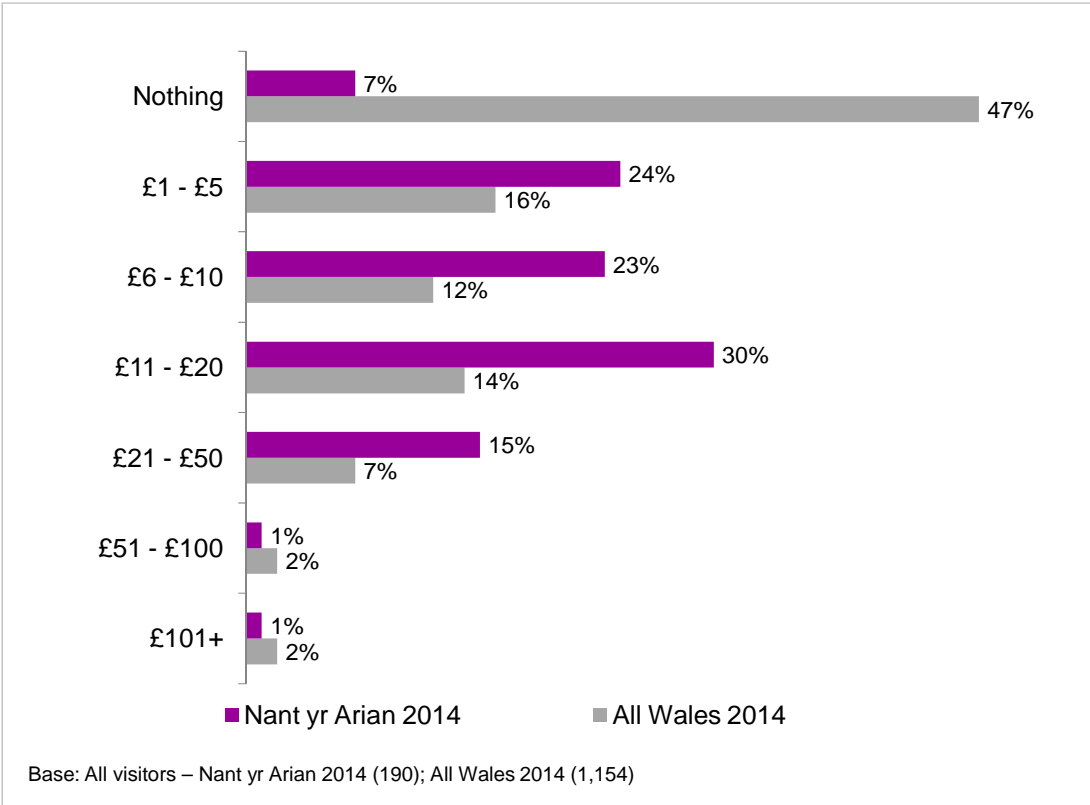
4.7 Money spent on site and in the area as a result of the visit

Visitors to were asked how much money they planned 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. Figure 7 shows the amounts calculated by combining the data across all types of spending.

Almost all visitors planned to spend some money at Nant y Arian (93%). Across all Wales visitors in general, only around half planned to spend something on average (53%). The popularity of the cafe at Nant y Arian, which 75% of visitors used, along with over a third using the shop/visitor centre (34%) will explain some of the high proportion spending money at Bwlch Nant y Arian.

The average spend was £15.04, slightly higher than the all Wales average of £11.15.

Figure 7: Q18a. Average spend per person/group at site



When looking at individual types of spending at the site, the item most likely to be bought at Bwlch Nant y Arian was food and drink, with over three quarters (77%) planning to spend on this (somewhat higher than the all Wales average of 39%). The average planned spend on food and drink was £9.38, which was also much more than the all Wales average of £5.53.

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.

Three quarters of visitors said they would spend money on parking (75%), again higher than average across Wales (41%). The average intended spend on parking was £5.15, which was over double the all Wales average of £2.06.

Just under one in ten (8%) planned to buy souvenirs or gifts, double the all Wales average of 4%. The intended spend on these items was not particularly different, at 72p at Nant yr Arian compared with 54p across Wales.

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

	% spending anything on items		Average spend on items £	
	Nant yr Arian %	All Wales %	Nant yr Arian £	All Wales £
Food and drink	77	39	£9.38	£5.53
Parking	75	41	£5.15	£2.06
Souvenirs / gifts	8	4	£0.72	£0.54
Activities at the site	2	1	£0.05	£0.06
Hiring equipment	-	2	-	£1.25
Anything else	-	4	-	£1.77

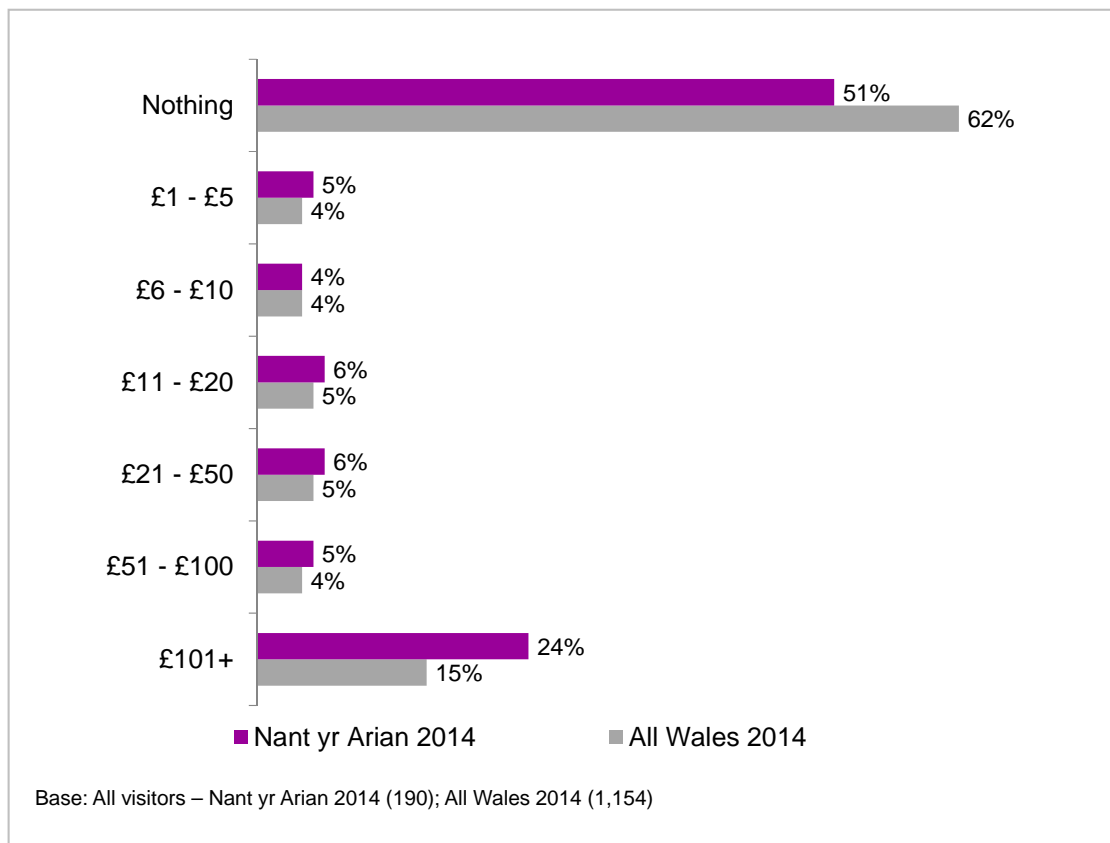
Base: All visitors – Nant yr Arian 2014 (190); All Wales 2014 (1,154)

Visitors to Nant y Arian 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. Figure 8 overleaf show the figures calculated by combining the data across all types of spending.

Half of visitors to Nant y Arian said that they did not intend to spend any money in the area as a result of their trip (51%); this was lower than the all Wales average (64%), therefore more visitors intended to spend in the area as a result of their visit compared to all Wales sites.

At the opposite end of the scale, the second most often mentioned intended spend at Nant y Arian was over £101 (24%). This was again higher than the all Wales average in 2014. See Figure 8 overleaf:

Figure 8: Q18b. Average spend per person/group in local area



The average spend in the area as a result of visiting Nant y Arian was £100.76, somewhat more than the all Wales average of £84.86, and is most likely a result of there being so many staying visitors at this site.

Looking at individual item spend in the local area as a result of their visit to Nant y Arian, food and drink and transport were mentioned by the highest proportions of visitors (38% and 31% respectively). Visitors were likely to spend £32.35 on food / drink and £17.31 on transport – see Table 6b overleaf.

The highest intended spend was on accommodation, which at £116.66 was over double the all Wales average of £50.24. One in five (19%) intended to spend on accommodation, a similar proportion to the all Wales average of 15%.

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

	% spending anything on items		Average spend on items £	
	Nant yr Arian %	All Wales %	Nant yr Arian £	All Wales £
Food and drink	38	27	£32.35	£26.37
Accommodation	19	15	£116.66	£50.24
Admissions to other attractions	8	5	£4.50	£4.97
Parking	23	10	£2.28	£1.56
Transport	31	20	£17.31	£9.83
Souvenirs / gifts	12	7	£4.11	£2.68
Hiring equipment	1	1	£0.18	£0.20
Anything else	-	3	-	£2.37

Base: All visitors – Nant yr Arian 2014 (190); All Wales 2014 (1,154)

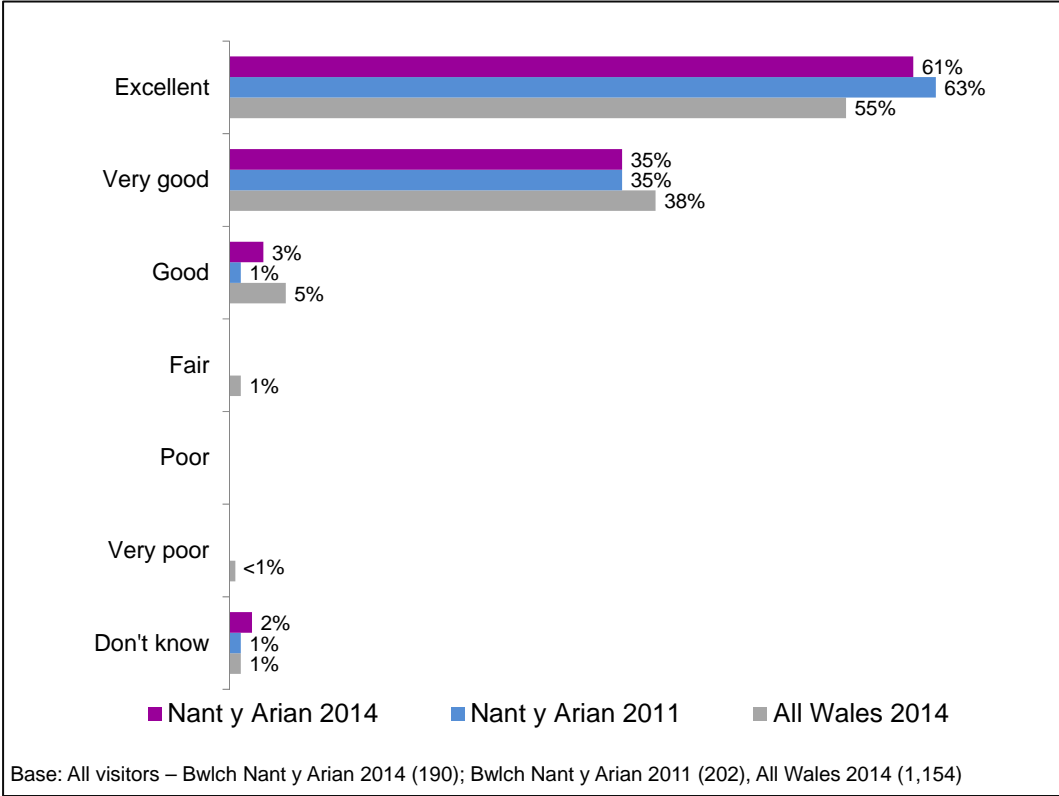
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Nant y Arian as a place to visit were very positive. This was also true across all Wales sites on average, and is consistent with the previous study conducted in 2011. In fact nobody interviewed at Nant y Arian in 2011 or 2014 gave a negative rating of the site.

Over six in ten visitors (61%) rated the site as excellent, which is in line with the 2011 survey and slightly higher than the all Wales findings (55%). A third (35%) rated the site as very good and a further 3% said it was good.

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

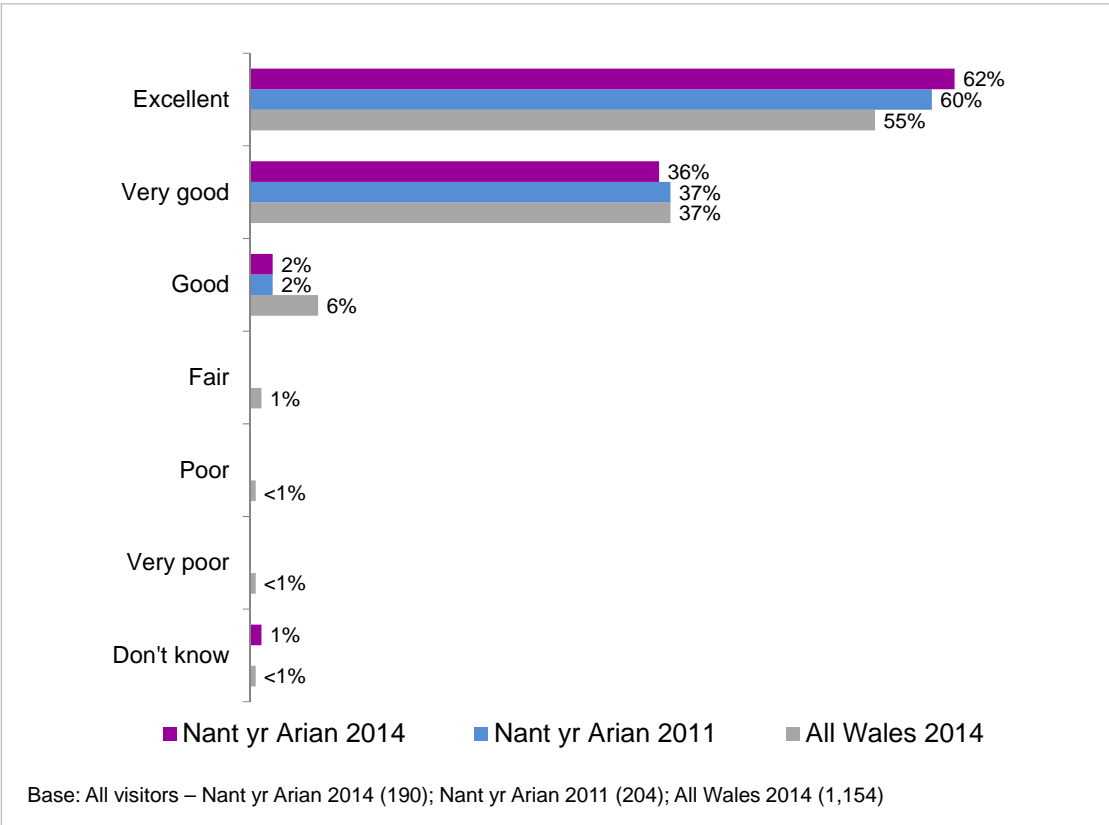


5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Nant y Arian was were also very positive, and remain unchanged since 2011. No-one gave a negative rating of the site in terms of it being safe and welcoming.

Over six in ten visitors gave this measure an excellent rating (62%) and a further third (36%) said it was very good. With 2% saying it was good, in total 100% were positive about how safe and welcoming Nant y Arian was.

Figure 10: Q11. Rating of the site in terms of being safe and welcoming



Visitors were then asked to explain why they had given a positive rating of how safe and welcoming the site was. The question was unprompted and visitors could mention more than one aspect of the site.

Table 7 overleaf details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Nant y Arian and all Wales sites.

The scenery, views and beautiful environment were mentioned by most visitors (54%), whilst 46% said that Nant y Arian was a safe environment generally and 39% said it was peaceful, pleasant, tranquil and relaxing.

Around a third (30%) mentioned the fresh air and open space and over a quarter (26%) appreciated the fact it was clean and tidy, litter free and well maintained.

A further quarter mentioned the good lay out and organisation at Nant y Arian (24%), and the same proportion talked about the good paths and trails (24%).

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

	Nant yr Arian 2014 %	All Wales 2014 %
The scenery / views / beautiful environment	54	41
Safe environment generally for all people	46	28
Peaceful / pleasant / tranquil / relaxing / welcoming	39	32
Fresh air / open space / plenty of space / freedom	30	22
Clean / tidy / well maintained / litter free	26	17
Well laid out / well organised / good set-up	24	14
Good provision of paths / trails and tracks	24	16
Good, safe place for the kids to play / run around	23	15
Friendly / helpful staff or rangers	22	9
Well signposted / good maps / info boards	21	16
Good quality facilities / amenities	16	14
Other visitors are friendly	10	6
Live locally / convenient / easy to get to / close	9	8
Good car parking	4	5
Easily accessible for wheelchairs / pushchairs	4	1
Dog friendly	1	2
Away from roads / no cars / cars drive slowly	1	2
Good value for money / cheap / free	1	1
Good café / catering	1	1
Plenty of other people around	1	1
Not too crowded	1	1

Base: Visitors rating the site as excellent, very good or good – Nant yr Arian 2014 (190); All Wales 2014 (1,137)

Other things mentioned by small numbers of visitors (1%) included:

- Dog friendly
- Away from roads / no cars
- Good value for money / free
- Good café
- Plenty of other people around but not too crowded.

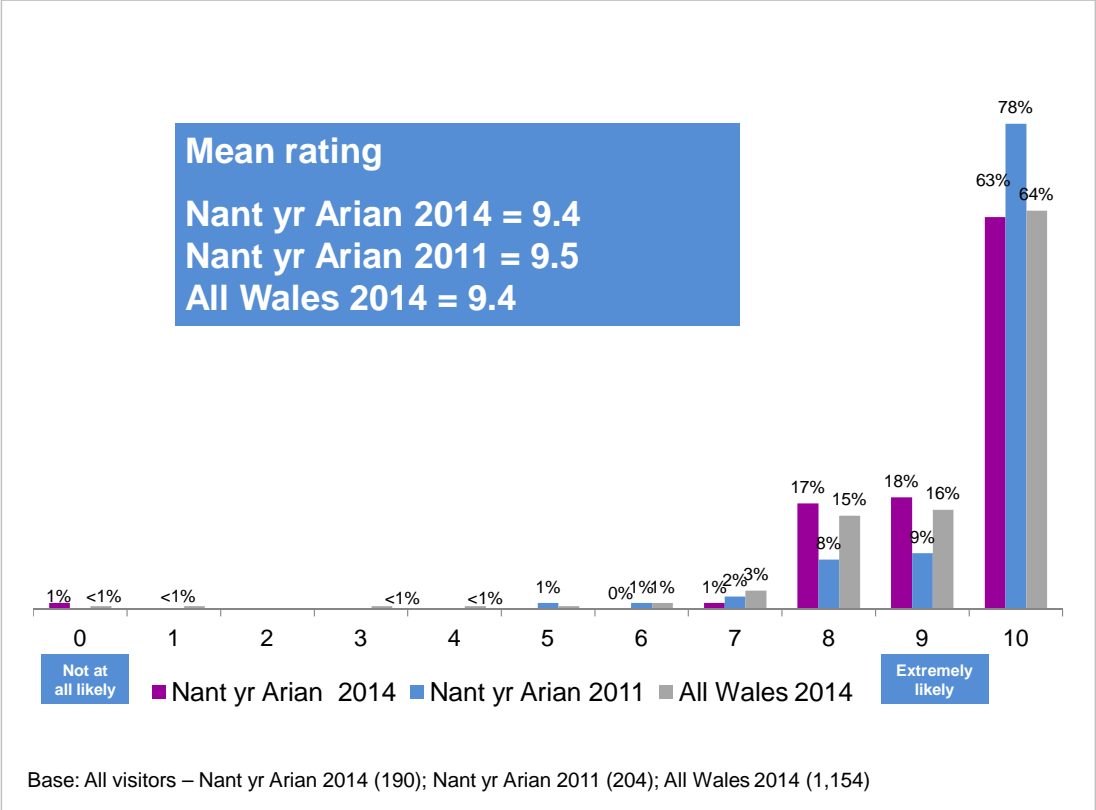
5.3 Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Nant y Arian 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'.

The score for Nant y Arian was extremely positive, with an average rating of 9.4 out of 10: this matches the all Wales average and is very close to the 2011 result of 9.5. Indeed, only 2% gave a rating of less than 8/10 for Nant y Arian – see Figure 11 below.

Although the average score was virtually unchanged since 2011, the proportion giving 10/10 dropped in 2014, from 78% to 63%, although more gave a rating of 8 or 9 out of 10 in 2014 (35%) compared to 2011 (17%).

Figure 11: Q17. Likelihood of recommending the site as a place to visit



These results can be analysed further by using a Net Promoter Score (NPS), which divides visitors 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 Nant y Arian is 80, which is somewhat higher than the all Wales score of 72 but does represent a decrease since 2011 when it was 85.

On a slightly different note: when asked if they were aware of the tree disease that was affecting larch trees in the area, 63% of visitors reported that they were, but had still decided to visit the site. Amongst the 71 individuals who were not aware of the disease affecting trees (37%), only 1 said that this might make a difference as to whether or not they visited Nant y Arian again in future.

5.4 Favourite things about the site

Visitors to Nant y Arian 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.

One main feature of Nant y Arian that stood out was the scenery and views or the fact it was beautiful and natural (63%). This was an increase on 2011 where 43% mentioned this aspect and is higher than the all Wales average of 47%.

Other favourite aspects of Nant y Arian include wildlife or bird watching (44%), peace, tranquillity, relaxation (35%) and the walks, paths, trails (29%).

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

Activities	Nant yr Arian 2014 %	Nant yr Arian 2011 %	All Wales 2014 %
Scenery / views / beautiful / natural	63	43	47
Wildlife / bird watching	44	31	18
Peace / tranquillity / relaxation / atmosphere	35	26	49
Walks / paths / trails	29	28	34
Fresh air / being outside	23	2	17
Good on-site facilities / BBQ / shop	17	28	16
Clean / well looked after	16	17	9
Cycle trails / freedom / opportunity to cycle	14	12	16
Close to home / convenient location	14	3	12
Safe environment	14	5	10
Been before / wanted to come again	14	-	6
Activities that are good for the children	8	8	9
Exercise / keeping fit	8	3	7
Like forests / trees / variety of trees and plants	7	7	10
Helpful / pleasant staff	6	3	2
Opportunity to spend time with family / friends	4	2	4
The weather	4	2	2
Café / restaurant	4	-	3
Lots to see and do	3	3	3
Ideal for dogs / dog friendly / safe for dogs	2	2	4
Play area	2	-	2
Sculptures /art	2	-	1

Base: All visitors – Nant yr Arian 2014 (190); Nant yr Arian 2011 (204); All Wales 2014 (1,154)

Other favourite things mentioned by small numbers of visitors (1%) included:

- Challenging environment
- Plenty of cheap parking
- Good value for money / free
- Well sign-posted
- Good accessibility
- Good toilets
- Not too crowded.

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.

Six in ten of visitors to Nant y Arian could not think of anything that would add to their enjoyment and only made positive comments (61%). This was much higher than the all Wales average (46%).

Any suggestions to improve the site were therefore 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 planting more trees (6%); this was only mentioned by 1% of visitors across all Wales sites.

Another 4% wanted longer opening hours of the café or the main gates, while 3% mentioned better parking, more trails or an improvement to the café / catering.

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

	Nant yr Arian 2014 %	All Wales 2014 %
Nothing / general positive comments	61	46
Plant more trees	6	1
Longer opening hours (café / main gates)	4	1
Better parking (easier, cheaper, more, free)	3	3
More trails / paths / cycle paths	3	4
Improve café / catering	3	3
More activities for the children / more play areas	2	4
Easier / less challenging paths, tracks and trails	2	1
Better weather / more sunshine	2	2
Improve toilets / more toilets / shower facilities / changing area	2	6
More dog poo bins / remove dog poo	2	7
Bike shop / more shops	2	1

Base: All visitors – Nant yr Arian 2014 (190); All Wales 2014 (1,154)

Other improvements mentioned by small number of visitors (1%) included:

- Improvements to signage
- More seating
- More picnic areas
- Bike hire
- Fewer people / fewer cyclists
- More litter bins
- More challenging paths, tracks and trails.

When asked if there was anything that interfered with their enjoyment of the site, almost three quarters reported that nothing had interfered with their enjoyment (72%). This was similar to the all Wales average of 70%. The comments made were therefore mentioned by very small proportions of visitors, and Table 10 below details those made by 2% of the sample or more:

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

	Nant yr Arian 2014 %	All Wales 2014 %
Nothing	72	70
Wet / raining / windy (poor weather)	10	8
Tree felling / chopping too many trees down	9	1
Problems with car parks (faulty machines, limited spaces)	2	1
Poor service in café / long queues / inconvenient opening hours	2	1

Base: All visitors – Nant yr Arian 2014 (190); All Wales 2014 (1,154)

The poor weather was mentioned by one in ten visitors (10%) and a similar proportion (9%) found the tree felling at the site had marred their enjoyment.

A small proportion of 2% reported a poor experience in the café, whether poor service, inconvenient opening hours or long queues. The same proportion had a problem with the car park (faulty machines, limited spaces).

Other things that had interfered with the enjoyment of small proportions of visitors (1%) included:

- Car parking expensive
- Signs unclear
- Issues with toilets (not enough, closed, dirty)
- Dog mess on the paths / in the play area
- Too busy / too many kids
- Poor maintenance of the site.

6. Site facilities

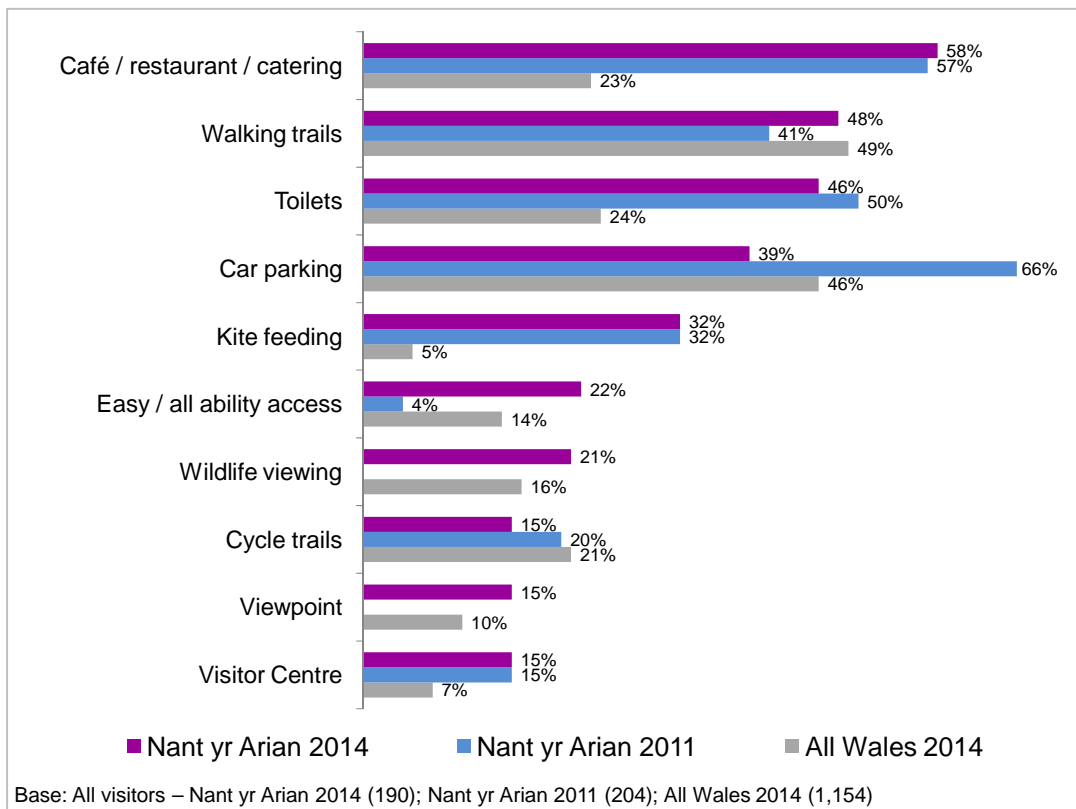
6.1 Importance of site facilities

Visitors were presented with a list of facilities available at Nant y Arian and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable. Full details are shown in Figures 12a and 12b.

The café / restaurant / catering was the most important site facility, with 58% mentioning this aspect. A further 48% mentioned the walking trails. The toilet facilities were important to 46% of visitors and car parking to 39%. The importance of car parking to visitors appears to have decreased since 2011, when it was an important factor for 66% of visitors.

Feeding the kites was important to almost a third of Nant y Arian visitors (32%), the same proportion as in 2011.

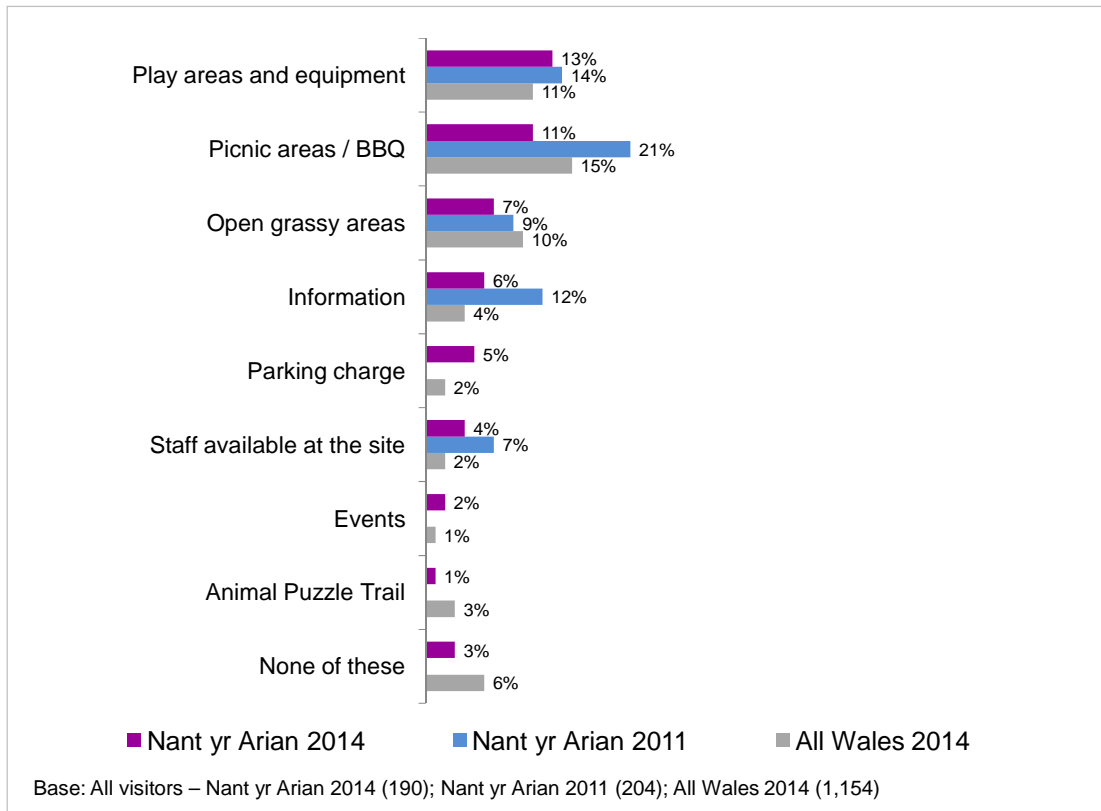
Figure 12a: Q13. Importance of different facilities in deciding to visit



Easy / all ability access was of more importance in 2014 than 2011, with 22% now mentioning this (compared with 4% in 2011). Similarly, general wildlife viewing was mentioned by 21% of visitors, whereas it wasn't mentioned at all in 2011.

A further area of new importance was the Viewpoint, which was mentioned by 15% of respondents in 2014, but again, wasn't mentioned in 2011.

Figure 12b: Q13. Importance of facilities in deciding to visit - continued



Certain other factors (apart from site facilities) were important to around a quarter of visitors (29%) when choosing to come to the site. Those mentioned by more than 2% of visitors are outlined below in Table 11 overleaf.

Just passing by was the main mention at 6% followed by the opportunity to meet up with family and friends (5%) or a good place for the children to play (4%). A few visitors were also influenced simply by the fact the site was close to home or conveniently located for them (4%).

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

	Nant yr Arian 2014 %	All Wales 2014 %
Nothing	71	60
Was just passing by / en route	6	5
Meeting / visiting with family and friends	5	3
Good for the children / can run around and play	4	4
Close to home / local / convenient	4	7
Been before / come here a lot / good memories	2	2
Outdoors / fresh air / open spaces	2	2
Dog friendly / dogs can come off leads / dog facilities	2	5
Close to where I am staying (staying visitors)	2	2
Wanted to go walking / cycling	2	3
Beautiful scenery / views / natural beauty	2	2
Good facilities	2	3

Base: All visitors – Nant yr Arian 2014 (190); All Wales 2014 (1,154)

Other important factors mentioned by small numbers of visitors (1%) included:

- A nice day out
- Good / sunny weather
- Easy to find / easy to get to
- Good parking / cheap / free
- Site events
- Using the river / pond / lake
- Easily accessible.

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 (78%), followed by the café / restaurant / catering facilities (74%) and the toilets (71%).

Walking trails were used by half of visitors (48%) and kite feeding was experienced by a third (34%). A similar proportion experienced general wildlife viewing (32%).

Around a third (29%) used the Visitor Centre. See Figure 13a and 13b overleaf for full details:

Figure 13a: Q15a. Facilities used at Nant yr Arian 2014

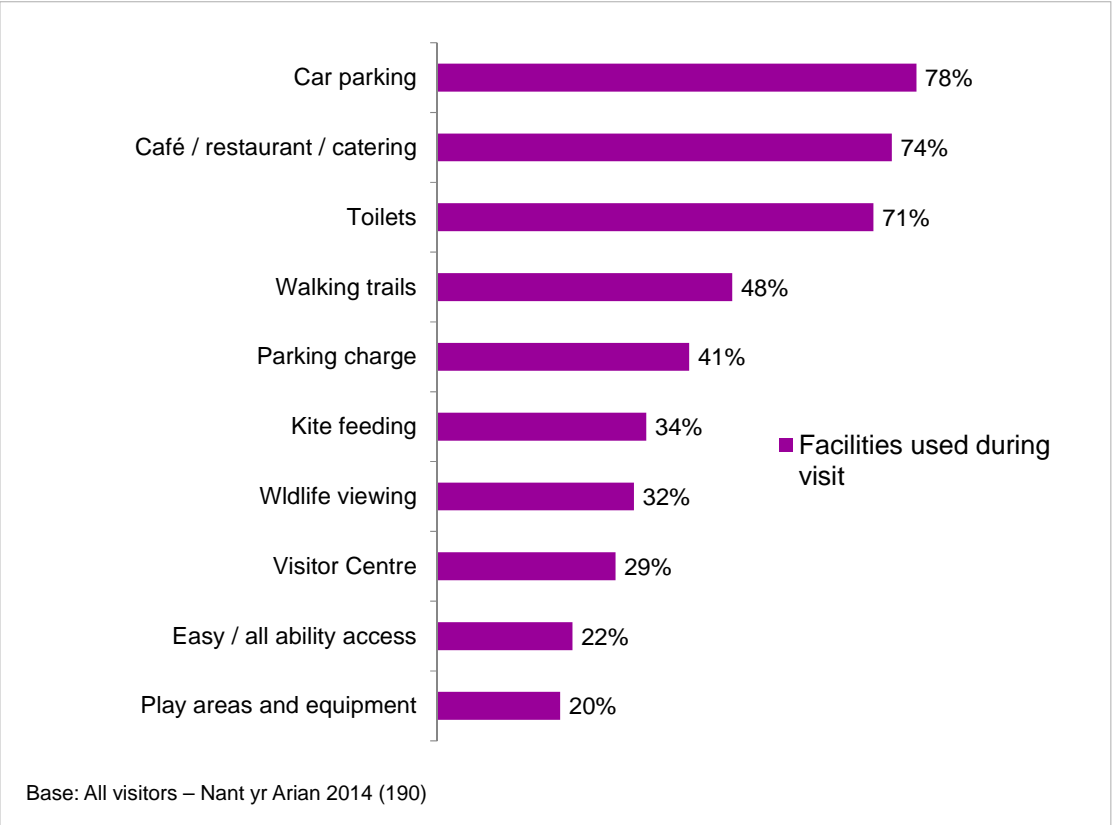
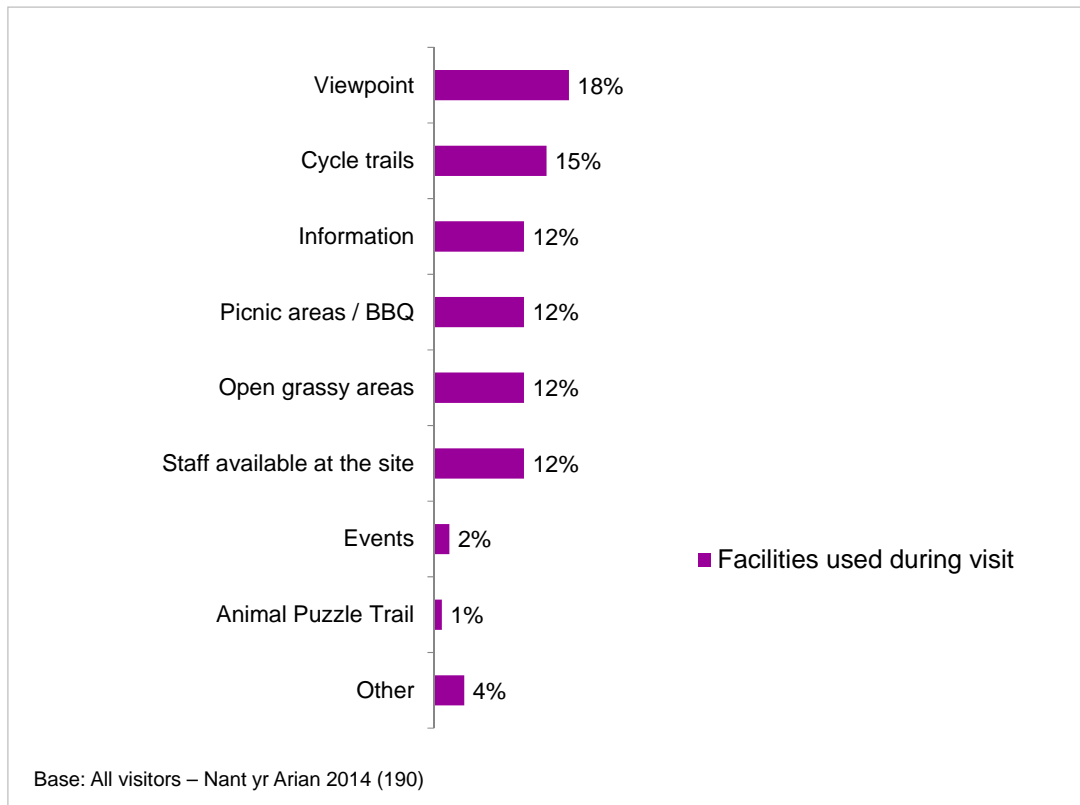


Figure 13b: Q15a. Facilities used at Nant yr Arian 2014 - continued



On a slightly different note: just over a quarter of visitors had a dog with them (28%), and the vast majority of these (96%) 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 Nant y Arian have been detailed in Figure 14 below. Ratings of most of the facilities were extremely positive, with only the parking charges receiving any real negative ratings.

The facility that received the highest score was the Viewpoint, which 88% rated as excellent, whilst 9% rated it as very good (9%). Kite feeding was also very positively rated; with 83% saying it was excellent, 14% very good and 3% good. Just under three quarters rated the wildlife viewing as excellent (73%) with a further 25% saying it was very good, and 2% good.

The facility that received the least positive rating was the parking charge: 7% said it was poor and 13% said it was 'fair' (i.e. not good). Nevertheless 81% still gave this aspect of the site a positive rating. See Figure 14 below for more details of the ratings given for each facility:

Figure 14: Q15b. Rating of Nant y Arian site facilities (where used) 2014

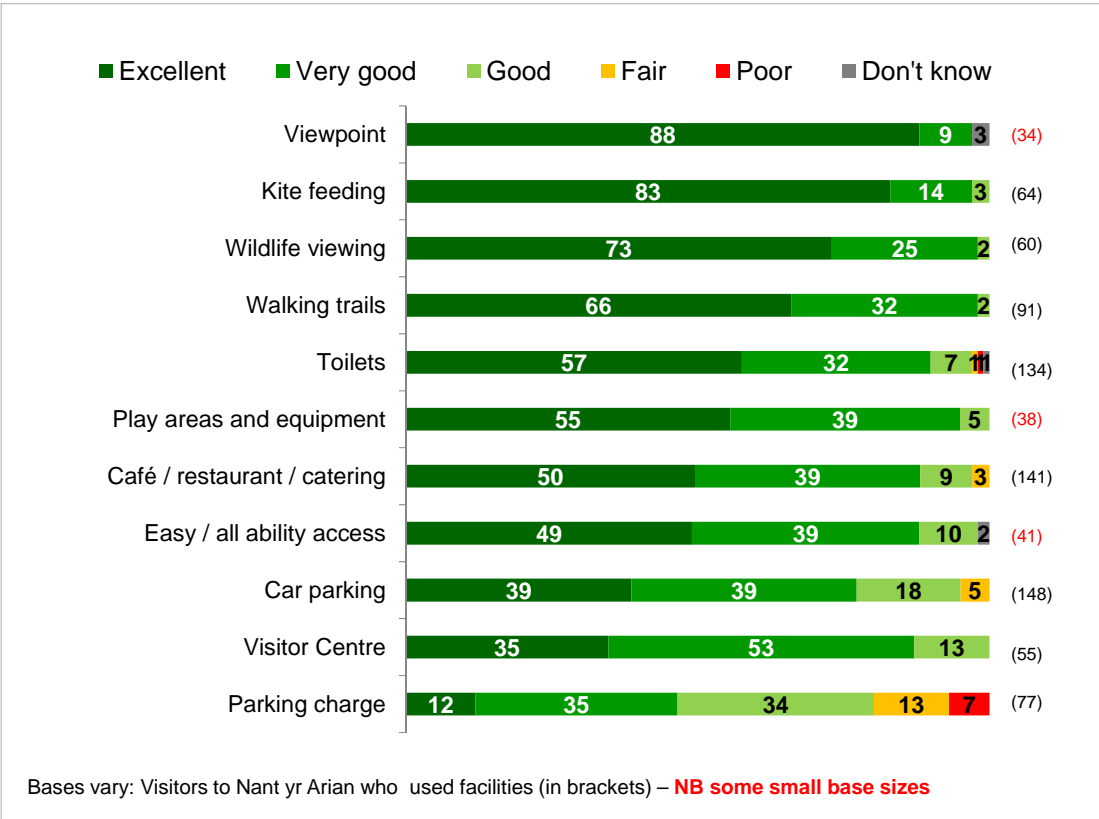


Table 12 below compares the proportions giving ‘excellent’ ratings to the facilities used in 2014 compared with 2011, where they were mentioned in the previous survey.

For all the facilities listed, the proportion who gave an ‘excellent’ rating increased since the previous research, with the most significant increases seen in the proportion rating the walking trails, kite feeding, easy access and toilets as excellent (35, 30, 27 and 21 percentage point increases respectively) – see Table 12 below for more details:

Table 12: Q15b – Proportions rating facilities at Nant y Arian as ‘Excellent’ 2014 vs. 2011

Facilities	Nant yr Arian 2014 %	Nant yr Arian 2011 %	% point change
Kite feeding	83	53	+30
Walking trails	66	31	+35
Toilets	57	36	+21
Play areas and equipment	55	42	+13
Café / restaurant / catering	50	32	+18
Easy / all ability access	49	22	+27
Car parking	39	35	+4
Visitor Centre	35	33	+2

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 Nant y Arian 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.

Half of visitors had always known about the site or been before (50%); as would be expected, this was much higher amongst repeat visitors (64%) than first-time visitors (7%). This was an increase since 2011 when around a third said they had always known about the site (32%) and brings Nant y Arian in line with the all Wales average (51%).

One in six (15%) said they had either heard of about Nant y Arian through word of mouth or had been just passing / en route to elsewhere.

Leaflets remain successful at letting people know about the site, with 12% in both 2014 and 2011 finding out about the site this way: three times more than across all Wales on average.

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

	Nant yr Arian 2014 %	Nant yr Arian 2011 %	All Wales 2014 %
Always known about it / been here before	50	32	51
Word of mouth	15	16	20
Just passing / en route	15	21	13
Leaflet	12	12	4
Tourist Information Centre / Tourist Board	5	2	2
Road signs	4	2	5
Google / other search engine	2	-	5
Live locally	2	1	2

Base: All visitors – Nant yr Arian 2014 (190); Nant yr Arian 2011 (204); All Wales 2014 (1,154)

Other sources of information mentioned by 1% of visitors included:

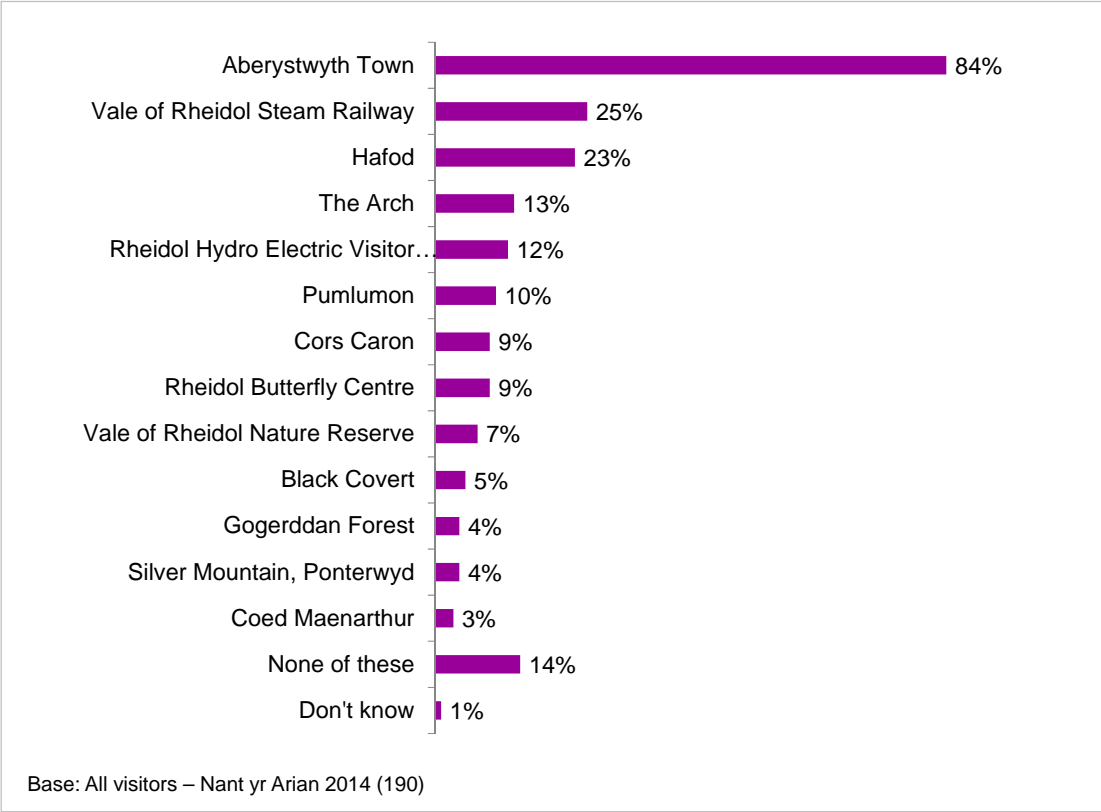
- Maps
- Other websites
- Newspapers
- NRW website
- Accommodation provider.

8. Visiting other areas and attractions

Visitors to Nant y Arian 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 (86%) had visited at least one.


Aberystwyth town was by far the most visited nearby attraction, with 84% of Nant y Arian visitors having been there over the last 12 months. Other popular attractions visited included the Vale of Rheidol Steam railway (25%) and Hafod (23%), followed by the Arch (13%), Rheidol Hydro Electric Visitor Centre (12%), Pumlumon (10%), Cors Caron (9%) and Rheidol Butterfly Centre (9%).

Figure 15: Q19. Other areas / attractions visited 2014



Appendix I

Questionnaire

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

APPROACH ADULTS AGED 16+ - READ OUT

Hello, my name is of Beaufort Research. We are conducting some market research in this area on behalf of 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)
		Q4a Personally taken part in	Q4b Others in group taken part in	Q4c Personally / other PLANNING to take part in
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)
	OTHERS			
	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

<p>Q7 How or where did you find out about this site as a place to visit? CODE ALL MENTIONED</p>	(55-58m)
<p>Always known about it / been here before</p>	1
<p>Word of mouth</p>	2
<p>Newspaper</p>	3
<p>Leaflet</p>	4
<p>Tourist Information Centre</p>	5
<p>Road signs</p>	6
<p>Just passing / en route</p>	7
<p>Map</p>	8
<p>Smartphone app</p>	9
<p>Facebook</p>	A
<p>Twitter</p>	B
<p>Forestry Commission website</p>	C
<p>Natural Resources Wales website</p>	D
<p>Google / other search engine</p>	E
<p>Other website (please specify) _____</p>	X
<p>Other (please specify) _____</p>	(59-62m) X
<p>Don't know / can't remember</p>	M
<p>Q8 What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED</p>	(63-66m)
<p>Peace / tranquillity / relaxation</p>	1
<p>Scenery / views / beautiful</p>	2
<p>Walks / paths / trails</p>	3
<p>Cycle trails / freedom / opportunity to cycle</p>	4
<p>Wildlife / bird watching</p>	5
<p>Fresh air / being outside</p>	6
<p>Exercise / keeping fit</p>	7
<p>Activities that are good for the children</p>	8
<p>Close to home / convenient</p>	9
<p>Opportunity to spend time with family / friends</p>	A
<p>Safe environment</p>	B
<p>Lots to see and / or do</p>	C
<p>Like forests / trees / variety of trees</p>	D
<p>Good on-site facilities</p>	E
<p>Clean / well looked-after</p>	F
<p>The weather</p>	G
<p>Been before / wanted to come again</p>	H
<p>Helpful / pleasant staff</p>	I
<p>Plenty / cheap / other reference to parking</p>	J
<p>Cost / value for money</p>	K
<p>Other (please specify)</p> <p>-----</p> <p>-----</p>	(67-70m)
<p>Nothing</p>	L
<p>Don't know</p>	M

ASK ALL

Q9 What, if anything, would enhance your enjoyment of this site? (75-78m)
PROBE Anything else?
DO NOT PROMPT – CODE ALL MENTIONED
IF MENTIONS WEATHER, PROBE FOR MORE DETAILS

- 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

Other (please specify)

(79-82m)

Nothing L

Don't know M

Q10 What, if anything, interfered with your enjoyment of this site today? (83-86m)
PROBE Anything else?
DO NOT PROMPT – CODE ALL MENTIONED
IF MENTIONS WEATHER, PROBE FOR MORE DETAILS

- 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

Other (please specify)

(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 } **Q12**
5
6

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)

(100-103m)

Don't know

M

ASK ALL

SHOWCARD G2

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	Animal Puzzle Trail	1
B	Café / restaurant / catering	6
C	Car parking	7
D	Cycling trails	A
E	Easy / all ability access	C
F	Events	D
G	Horse riding	K
H	Information available / interpretation	M
I	Kite feeding	N
		(109-112m)
J	Open grassy areas	2
K	Orienteering / Geocaching	3
L	Parking charge	4
M	Picnic areas / BBQ	5
N	Play areas and equipment	7
O	Staff available at the site	A
P	Toilets	B
Q	Viewpoint	D
R	Visitor Centre	E
S	Walking trails	F
T	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 G2 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 CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(125-128m)								
A	Animal Puzzle Trail	1	1	2	3	4	5	6	7	(140)
B	Café / restaurant / catering	6	1	2	3	4	5	6	7	(145)
C	Car parking	7	1	2	3	4	5	6	7	(146)
D	Cycling trails	A	1	2	3	4	5	6	7	(149)
E	Easy / all ability access	C	1	2	3	4	5	6	7	(151)
F	Events	D	1	2	3	4	5	6	7	(152)
G	Horse riding	K	1	2	3	4	5	6	7	(159)
H	Information available / interpretation	M	1	2	3	4	5	6	7	(160)
I	Kite feeding	N	1	2	3	4	5	6	7	(161)
		(129-132m)								
J	Open grassy areas	2	1	2	3	4	5	6	7	(164)
K	Orienteering / Geocaching	3	1	2	3	4	5	6	7	(165)
L	Parking charge	4	1	2	3	4	5	6	7	(166)
M	Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
N	Play areas and equipment	7	1	2	3	4	5	6	7	(169)
O	Staff available at the site	A	1	2	3	4	5	6	7	(172)
P	Toilets	B	1	2	3	4	5	6	7	(173)
Q	Viewpoint	D	1	2	3	4	5	6	7	(175)
R	Visitor Centre	E	1	2	3	4	5	6	7	(176)
S	Walking trails	F	1	2	3	4	5	6	7	(177)
T	Wildlife viewing	G	1	2	3	4	5	6	7	(178)
		(133-136m)								
OTHERS (WRITE IN)			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 petro l _____ (277-280)
- Souvenirs / gifts _____ (281-284)
- Hiring equipment such as boats, bikes or horses _____ (285-288)
- Anything else _____ (289-292)

ASK ALL**SHOWCARD K2 (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

Aberystwyth town
 Black Covert
 Coed Maenarthur
 Cors Caron
 Gogerddan Forest
 Hafod
 Pumlumon
 Rheidol Butterfly Centre
 Rheidol Hydro Electric Visitor Centre
 Silver Mountain, Ponterwyd
 The Arch
 Vale of Rheidol Nature Reserve
 Vale of Rheidol Steam Railway

None of these
 Don't know

(340-343m)

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

FOU: (370-410 FOR Q20)

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

(374)

Yes

1 **Q20ci**

No

2

Don't know

Q20b
 3

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?

(375)

Yes

1

No

2

Don't know

3

Q20ci INTERVIEWER – CODE IF RESPONDENT HAS A DOG WITH THEM

(376)

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?

(377)

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

- Male
- Female

(415)
1
2

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

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

Refused

(416)
1
2
3
4
5
6
7

SHOWCARD M

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

SINGLE CODE

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

Refused

(417)
1
2
3
4
5
6
7
8
9
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.)

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

Job title _____

Position / Grade _____

- AB
- C1
- C2
- DE

Refused

(418)
1
2
3
4
5

Q25	Do you have any children aged 15 or under living in your household?	(420)
	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? INCLUDES PROBLEMS RELATED TO OLD AGE	(421)
	Yes – limited a lot	1
	Yes – limited a little	2
	No	3
	Refused	4
SHOWCARD N		
Q27	Which of these best describes your ethnic origin? SINGLE CODE	(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:									
THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.									
<i>Interviewer Declaration:</i> I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:									
Signature			Date of interview:						
			(435)(436)(437)(438)						
WRITE IN YOUR INTERVIEWER NUMBER →			(439)	(440)					
			(441)	(442)					
B01326-2	F.O.U (BACK CHECKS)		Accompanied	<table border="1"> <tr> <td>Yes</td> <td>1</td> </tr> <tr> <td>No</td> <td>2</td> </tr> </table>	Yes	1	No	2	Supervisor signature
Yes	1								
No	2								

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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