

Research Report

Quality of the Visitor
Experience 2015

Cadair Idris National
Nature Reserve



Prepared for:
Natural Resources Wales /
Forestry Commission England

Prepared by:
Beaufort Research



**Cyfoeth
Naturiol**
Cymru
**Natural
Resources**
Wales



Forestry Commission
England

Contact Details

Agency contact: Sarah McDonough

Project: B01326-3

Date: February 2016

Beaufort Research

2 Museum Place

Cardiff

CF10 3BG

Tel: (029) 2037 8565

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

Terms of Contract

Unless otherwise agreed, the findings of this study remain the copyright of Beaufort Research Ltd and may not be quoted, published or reproduced without the company's advance approval.

Approval to quote or publish will only be withheld on the grounds of inaccuracy or misrepresentation.

Any approved publication must detail: Beaufort Research Ltd as provider, sample size and field dates.

© Beaufort Research Ltd 2016



Contents	Page
1. Executive summary	1
1.1 Quality of the Visitor Experience Research.....	1
1.2 Cadair Idris	1
1.3 Perceptions of the site	2
1.4 Strengths of the site	3
1.5 Areas for improvement.....	3
1.6 Visitor profile	4
2. Introduction	5
2.1 Background.....	5
2.2 Research programme	6
2.3 Report	7
2.4 Data tables.....	7
3. Visitor profile information	8
3.1 Visitor profile	8
3.2 Group profile	10
3.2.1 Size of group.....	10
3.2.2 Composition of group.....	11
4. Profile of visit	12
4.1 Type of visit.....	12
4.2 Visitor origin	13
4.3 Frequency of visits	15
4.3.1 First-time visitors.....	15
4.3.2 Repeat visitors	15
4.4 Length of visit.....	16
4.5 Activities undertaken.....	17
4.6 Length of time spent on activities.....	19
4.7 Money spent at site and in area as a result of the visit	20

5.	Perceptions of the site	24
5.1	Overall rating of the site as a place to visit.....	24
5.2	Overall rating of the site as safe and welcoming.....	25
5.3	Recommending the site as a place to visit.....	27
5.4	Strengths of the site	29
5.5	Areas for improvement.....	30
6.	Site facilities	33
6.1	Importance of site facilities.....	33
6.2	Facilities used	36
6.3	Rating of site facilities	37
7.	Sources of information used to plan visit	38
8.	Visiting other areas and attractions	39
9.	Awareness of NNR status and managing organisation	40

Appendices

Appendix I - Questionnaire

Appendix II - Explanation of social class

1. Executive summary

1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research conducted 8,417 interviews with visitors to forests, woodland sites and National Nature Reserves across England and Wales. In 2015, a total of 2,950 interviews were conducted: 1,762 in England and 1,188 in Wales.

A total of 42 sites were surveyed: 14 per year (7 in each country). All selected sites in England were high usage, while sites in Wales consisted of a combination of medium and high usage sites. In 2015, 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 233 visitor interviews conducted at Cadair Idris National Nature Reserve in 2015. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites) – the survey has not been conducted at this site previously, therefore it has not been possible to track any changes over time.

1.2 Cadair Idris

Cadair Idris National Nature Reserve lies at the southern end of the Snowdonia National Park near the town of Dolgellau.

Cadair Idris peak, which is one of the most popular in Wales for walkers and hikers, is composed largely of Ordovician igneous rocks, with classic glacial erosion features such as cwms, moraines, striated rocks, and roches moutonnées. There are three main trails that lead to the top of Cadair Idris: Pony Path, Fox's Path and Minffordd Path. The summit, which is covered in scree, is marked by a trig point. There is also a low-standing stone shelter with a roof.

The crater-like shape of Llyn Cau has given rise to the occasional mistaken claim that Cadair Idris is an extinct volcano. The natural bowl-shaped depression was actually formed by a cirque glacier during the last ice age when snow and ice accumulated in the corries due to avalanches on higher slopes.

There are a large variety of facilities available at the site, including walking trails, toilets, a café, Visitor Centre and a Viewpoint area.

1.3 Perceptions of the site

Perceptions of Cadair Idris as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Cadair Idris gave a negative rating of the site.

Two thirds (64%) rated the site as 'excellent', which is slightly higher than the all Wales figure (58%). A further third (31%) gave the site a rating of 'very good' and 4% rated it as 'good' (both in line with the all Wales figures of 35% 'very good' and 5% 'good').

Similarly, ratings of how safe and welcoming Cadair Idris were also very positive, which was also the case across all Wales sites. None of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just over half the visitors gave this measure an 'excellent' rating (54%); this is in line with the figure obtained for all Wales sites (52%). Another third (36%) gave a 'very good' rating for how safe and welcoming Cadair Idris felt (compared to 37% across all Wales sites). Just under one in ten (7%) gave a 'good' rating (8% all Wales).

When asked whether they would be likely to recommend Cadair Idris as a place to visit to a friend or relative (using a score of 0-10), scores for Cadair Idris and all Wales sites generally were extremely positive. The average score for Cadair Idris in 2015 was 9.7 out of 10, higher than the all Wales score of 9.4.

Looking at the perceived quality of various facilities at the site; the facility that received the highest score was the National Nature Reserve. Three quarters rated this as 'excellent' (73%) whilst the remainder rated it as 'very good' (27%). The walking trails and café / restaurant / catering also received very high scores: around half rated the walking trails as 'excellent' (46%) whilst 41% said the same of the café / restaurant / catering.

Around a third rated the car park as 'excellent' (35%) whilst most of the remaining users rated this as 'very good' or 'good' (57%).

The facility that received the least positive rating was the toilets: while the majority rated these positively (87% saying 'excellent', 'very good' or 'good'), another 7% rated these as 'fair', and the same proportion said that they were 'poor'.

1.4 Strengths of the site

Three favourite things about Cadair Idris stood out; the most mentioned (by eight in ten) was scenery and beautiful views' (82%), followed by around half mentioning walks, paths and trails (55%) and the peace and tranquillity of the site (52%). A significantly higher proportion of visitors to Cadair Idris favoured the scenery at this site compared to all Wales sites (62%).

1.5 Areas for improvement

Over half of visitors to Cadair Idris could not think of anything that would add to their enjoyment and only made positive comments (58%). This was slightly higher than the all Wales average of 53%, illustrating that fewer visitors to Cadair Idris had any issues with the site, compared to all Wales sites in general.

Any suggestions to improve the site were made by relatively small numbers of visitors; the most frequently mentioned improvement related to improving the signage at the site: 9% of visitors wanted to see better signs and maps, or more signs and maps. A similar proportion (8%) felt that the parking could be improved, with more spaces and lower charges.

There were calls by small minorities for:

- More information on wildlife / vegetation / area
- More activities for children / more play areas
- More trails / paths / cycle tracks
- More dog poo bins / remove dog poo
- Improve café / catering
- Longer / more challenging paths, tracks and trails
- More seating
- More sheltered areas
- Easier / less challenging paths, tracks and trails
- Provide café / catering.

1.6 Visitor profile

In 2015, just over two fifths (43%) of visitors to Cadair Idris were first-time visitors; this proportion was higher than the all Wales average of 37% who said they had **never** visited their respective NRW site before. Therefore, a slight majority of visitors to Cadair Idris had been to the site previously (57%).

Reflecting this, the majority of visitors to Cadair Idris were visiting and staying in the area (65%) rather than coming to the site for a day trip (35%). This is in contrast to the all Wales average, where the majority were day trip visitors (62%) rather than staying visitors (37%).

The gender profile was fairly skewed towards more males than females (68% of visitors were men compared with 32% women). Male visitors accounted for 10% more visitors to Cadair Idris compared to all sites across Wales (58% male and 42% female for the all Wales average).

However, in terms of age, the profile of visitors to Cadair Idris was more in line with the all Wales average. One in five (20%) were aged 16-34 years (vs. 22% all Wales), while around half (52%) were aged 35-54 years (vs. 43% all Wales). There were marginally fewer visitors aged 55+ at Cadair Idris (28%) compared to the all Wales average of 34%.

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). The skew towards ABC1 visitors was even more pronounced at Cadair Idris, with 85% of visitors categorised as ABC1, and just 14% categorised as C2DE.

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 conducted 8,417 interviews with visitors to forests, woodland sites and National Nature Reserves across England and Wales. In 2015, a total of 2,950 interviews were conducted: 1,762 in England and 1,188 in Wales.

A total of 42 sites were surveyed: 14 per year (7 in each country). All selected sites in England were high usage, while sites in Wales consisted of a combination of medium and high usage sites. In 2015, interviews were conducted at 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

Table 1 below details the sites surveyed in 2015, 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
Dalby	259	Cadair Idris NNR (H)	233
Fineshade	274	Craig y Dinas (M)	144
Haldon	243	Fforest Fawr (M)	147
Hicks Lodge	233	Gwaun Hepste (M)	127
Jeskyns	287	Hafod (M)	140
Kielder	244	Newport Wetlands NNR (H)	233
Wyre	222	Tan y Coed (M)	164
TOTAL	1,762	TOTAL	1,188

* H = High usage; M = Medium usage

Interviews were 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 2015. At Cadair Idris, interviewing took place between 30th March and 3rd October, and a total of 233 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Cadair Idris in 2015, 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) – the survey has not been conducted at this site previously, therefore it has not been possible to track any changes over time.

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
- 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 Cadair Idris. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2015. The profile of visitors to Cadair Idris was slightly different to that of the visitors to all the Wales sites.

The gender profile was fairly skewed towards more males than females (68% of visitors were male compared with 32% female). Male visitors accounted for 10% more visitors to Cadair Idris compared to all sites across Wales (58% male and 42% female for the all Wales average).

However, in terms of age, the profile of visitors to Cadair Idris was more in line with the all Wales average. One in five (20%) were aged 16-34 years (vs. 22% all Wales), while around half (52%) were aged 35-54 years (vs. 43% all Wales). There were marginally fewer visitors aged 55+ at Cadair Idris (28%) compared to the all Wales average of 34%.

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). The skew towards ABC1 visitors was even more pronounced at Cadair Idris, with 85% of visitors categorised as ABC1, and just 14% categorised as C2DE.

No doubt reflecting the socio-economic profile, the majority of visitors to Cadair Idris were in full-time employment (70%), which was markedly higher than the all Wales average of 59%. Other proportions on working status were in line with the all Wales averages.

Just over a quarter (27%) had children living at home; this was only slightly lower than the all Wales average of 29%.

The overwhelming majority of visitors to Cadair Idris were White British / Welsh / Irish (90%), with only a small number of visitors describing their ethnicity as 'White other' (7%) or 'Black / Asian / Mixed' (3%); these figures are in line with the all Wales average.

One in ten visitors to Cadair Idris (12%) spoke Welsh, which was again in line with the all Wales average of 13% – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2015

Demographic groups		Cadair Idris 2015 %	All Wales %
Gender	Male	68	58
	Female	32	42
Age	16 - 24	5	6
	25 - 34	15	16
	35 – 44	22	21
	45 – 54	30	22
	55 – 64	19	19
	65+	9	15
	Refused	<1	1
Social class	AB	43	32
	C1	42	43
	C2	9	16
	DE	5	9
	Refused	<1	1
Working status	Full-time employee (30+ hours per week)	70	59
	Part-time employee (<30 hours per week)	4	9
	Self-employed	6	6
	Full-time education	3	3
	Unemployed	<1	1
	Permanently sick / disabled	<1	1
	Retired	12	18
	Refused	4	1
Limiting illness	Yes – limited a lot / a little	4	6
	No	91	92
	Refused	4	2
Children in household	Yes	27	29
	No	71	70
	Refused	2	1
Ethnicity	White – British / Welsh / Irish	90	91
	White – Other	7	7
	Black / Asian / Mixed	3	2
Welsh speaker	Yes	12	13
	No	88	87

Base: All visitors – Cadair Idris 2015 (233); All Wales (1,188)

3.2 Group profile

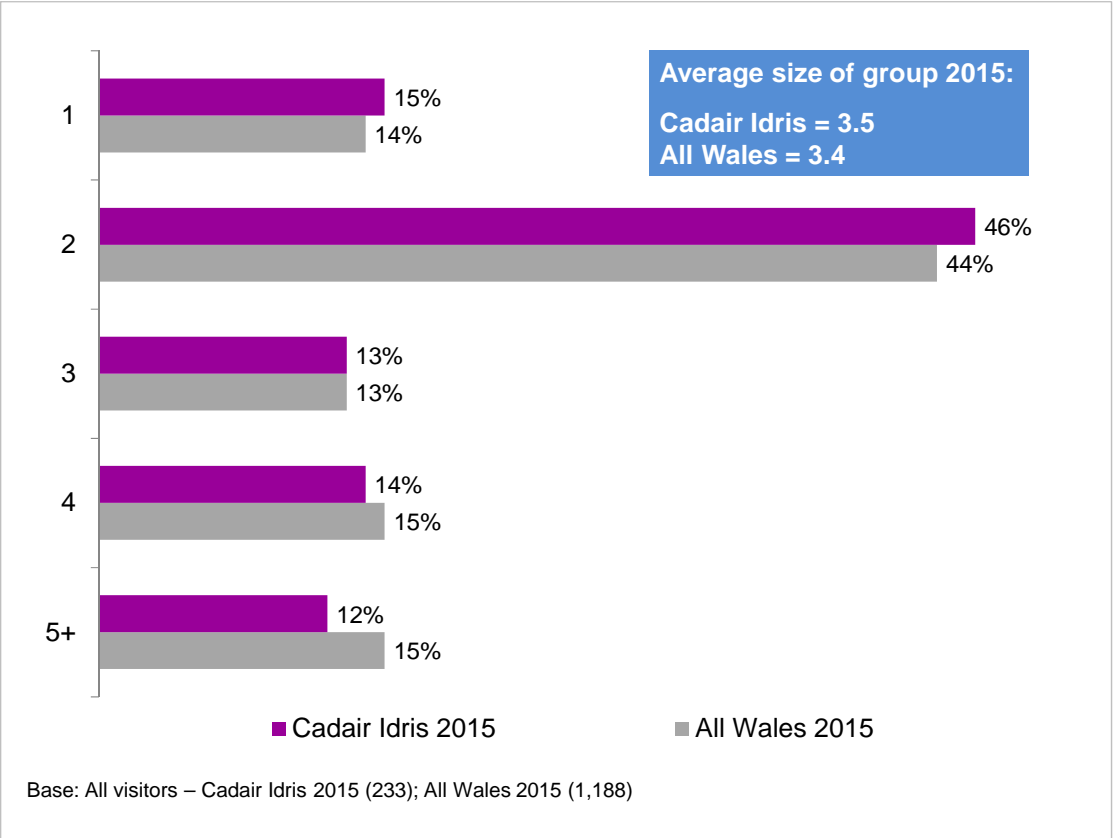
3.2.1 Size of group

Group sizes at Cadair Idris (averaging 3.5 people), were in line with average group sizes to all Wales sites (3.4 people).

The largest group by some margin (46%) was made up of two people; again in line with the all Wales figure (44%).

However, two in five of the groups visiting Cadair Idris contained three or more people (39%), 12% of which were fairly large (5 or more people) – see Figure 1 below.

Figure 1: Q1. Total size of the group



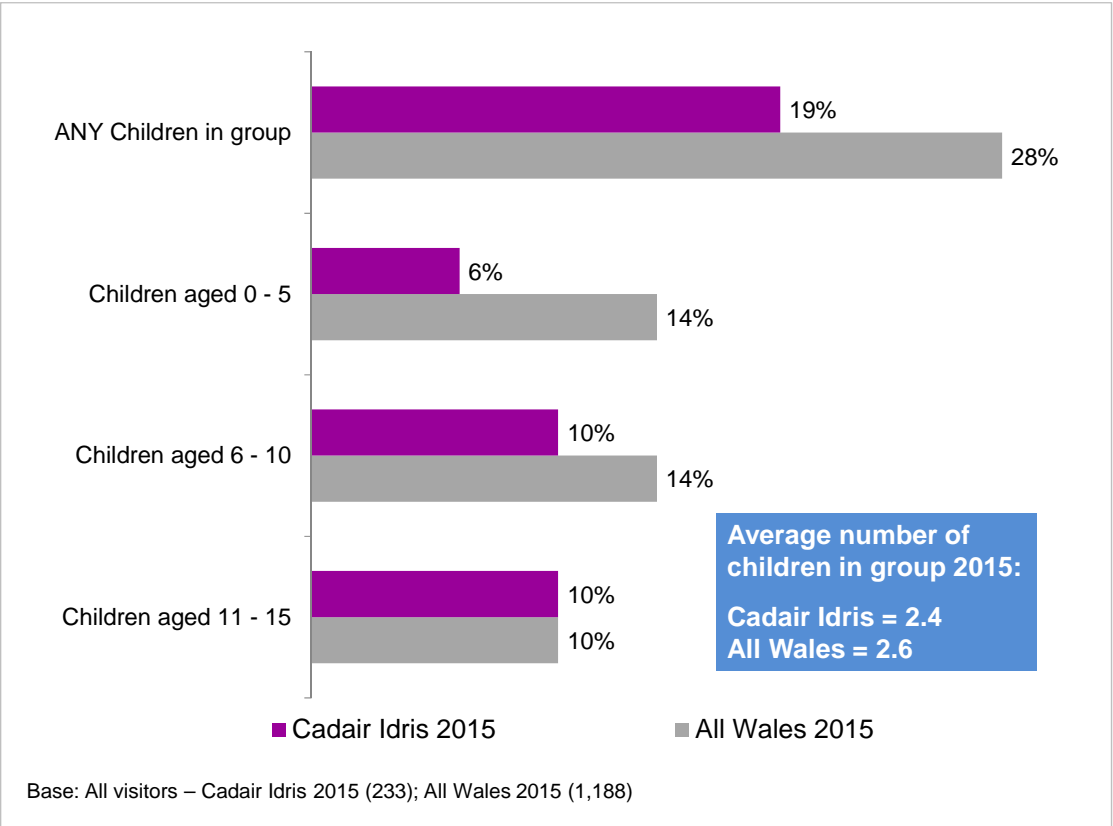
3.2.2 Composition of group

Just less than one if five of the groups who visited Cadair Idris contained children (19%); this was noticeably lower than the all Wales figure of 28%.

However, the average number of children per group visiting Cadair Idris in 2015 was consistent with the all Wales average (mean of 2.4 children per group at Cadair Idris cf. 2.6 all Wales).

There were noticeably fewer children aged 0-5 years visiting this site (6% of visitor groups included children of this age) compared to all sites across Wales (14%). Children visiting Cadair Idris were more likely to be older, with 10% aged 6-10 years (cf. 14% all Wales) and another 10% aged 11-15 years (equal to all Wales average of 10%) – see Figure 2 below.

Figure 2: Q1. Composition of group



4. Profile of visit

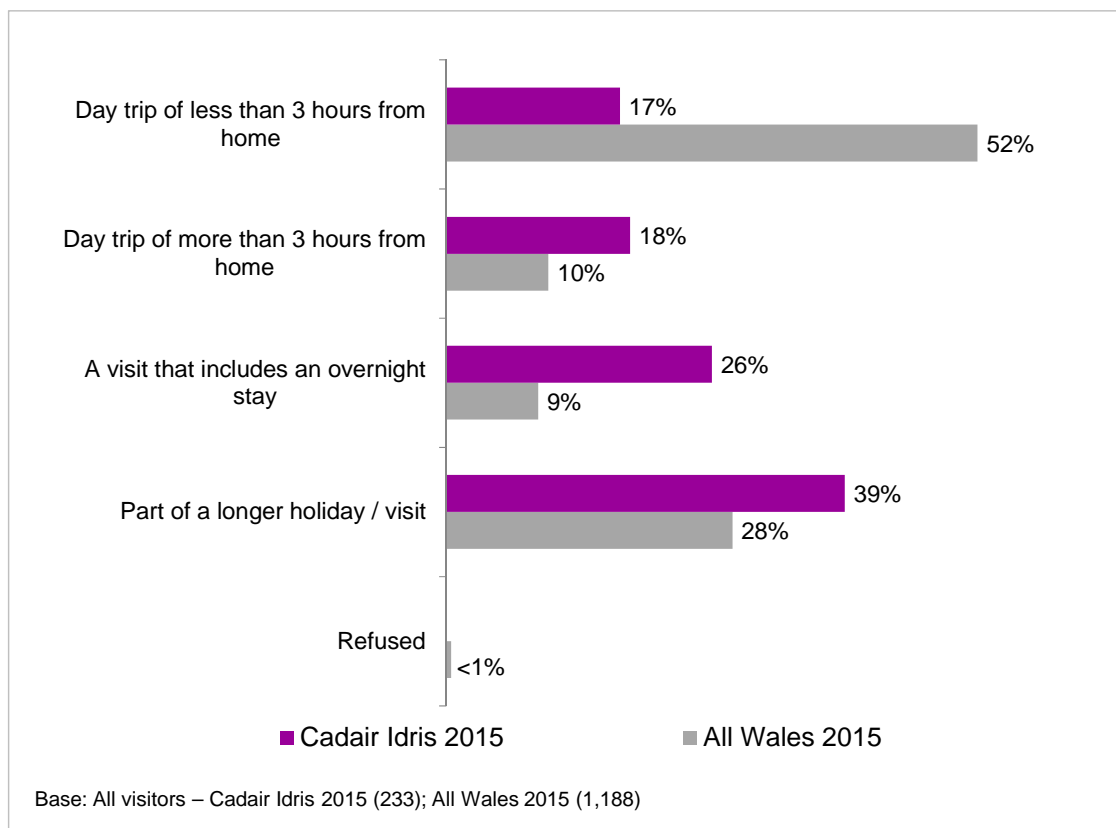
4.1 Type of visit

The majority of visitors to Cadair Idris were staying in the area (65%) rather than coming to the site for a day trip (35%). This is in contrast to the all Wales average, where the majority were day trip visitors (62%) rather than staying visitors (37%).

Around a quarter of visitors to Cadair Idris were on a visit that included at least one overnight stay (26%), while a further two in five (39%) were visiting as part of a longer holiday. Around a quarter of visitors to Cadair Idris were on a visit that included at least one overnight stay (26%), while a further two in five (39%) were visiting as part of a longer holiday.

Amongst day trip visitors, there was a fairly even split between those who were local (17% travelling less than 3 hours to reach the site) and those who were visiting for the day from slightly further afield (18% travelling more than 3 hours to reach the site). The proportion of more local visitors to Cadair Idris was markedly different to the all Wales average, where over half (52%) were travelling less than 3 hours to visit the woodland / NNR – 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.

Reflecting the propensity of staying visitors to the site, the majority of visitors to Cadair Idris lived outside of Wales (67%) and most of these (62%) were visiting from England. A small proportion (1%) was visiting from Scotland or Northern Ireland, while 4% had come from abroad.

Amongst the third of visitors who lived in Wales (33%), most resided in Mid / West Wales (16%). Just fewer than one in ten travelled from North or South East Wales (6% for each), with smaller proportions visiting from South West Wales (3%) and the Valleys (1%).

Given the higher proportion of staying visitors to Cadair Idris compared to all sites surveyed across Wales, it is perhaps not surprising that almost half of visitors to Cadair Idris resided in Wales (33%) compared to the all Wales average of 61% - Table 3 below and Figure 4 overleaf provide more details.

Table 3: Q28b. Visitor origin 2015

Area of residence		Cadair Idris 2015 %	All Wales %
Home region	North Wales	6	4
	Mid / West Wales	16	14
	South West Wales	3	7
	Valleys	1	6
	South East Wales	6	30
	Outside of Wales	67	39
Home nation	Wales	33	61
	England	62	35
	Rest of UK	1	<1
	Abroad	4	4

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

Figure 4: Map of visitor origin for Cadair Idris



4.3 Frequency of visits

4.3.1 First-time visitors

In 2015, just over two fifths (43%) of visitors to Cadair Idris were first-time visitors; this proportion was higher than the all Wales average of 37% who said they had **never** visited their respective NRW site before.

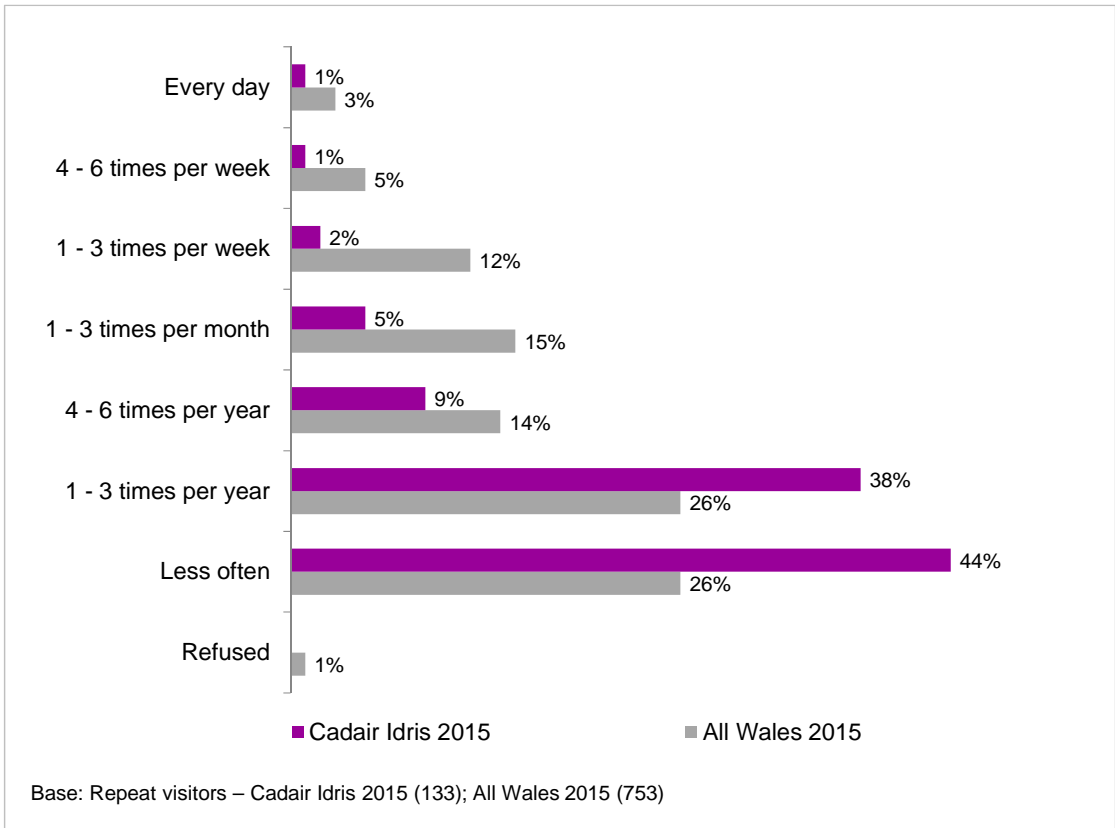
Therefore, a slight majority of visitors to Cadair Idris had been to the site previously (57%).

4.3.2 Repeat visitors

Focussing on repeat visitors, it can be seen that the vast majority were fairly infrequent visitors, who came to Cadair Idris 1-3 times a year or less often (82%). This was markedly higher than the all Wales average of 52% infrequent visitors.

In contrast, only one in ten (9%) visited Cadair Idris at least once a month (cf. 35% for all Wales sites), while 9% visited every few months (4-6 times a year), compared to 14% across all Wales sites – see Figure 5 below for more details.

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



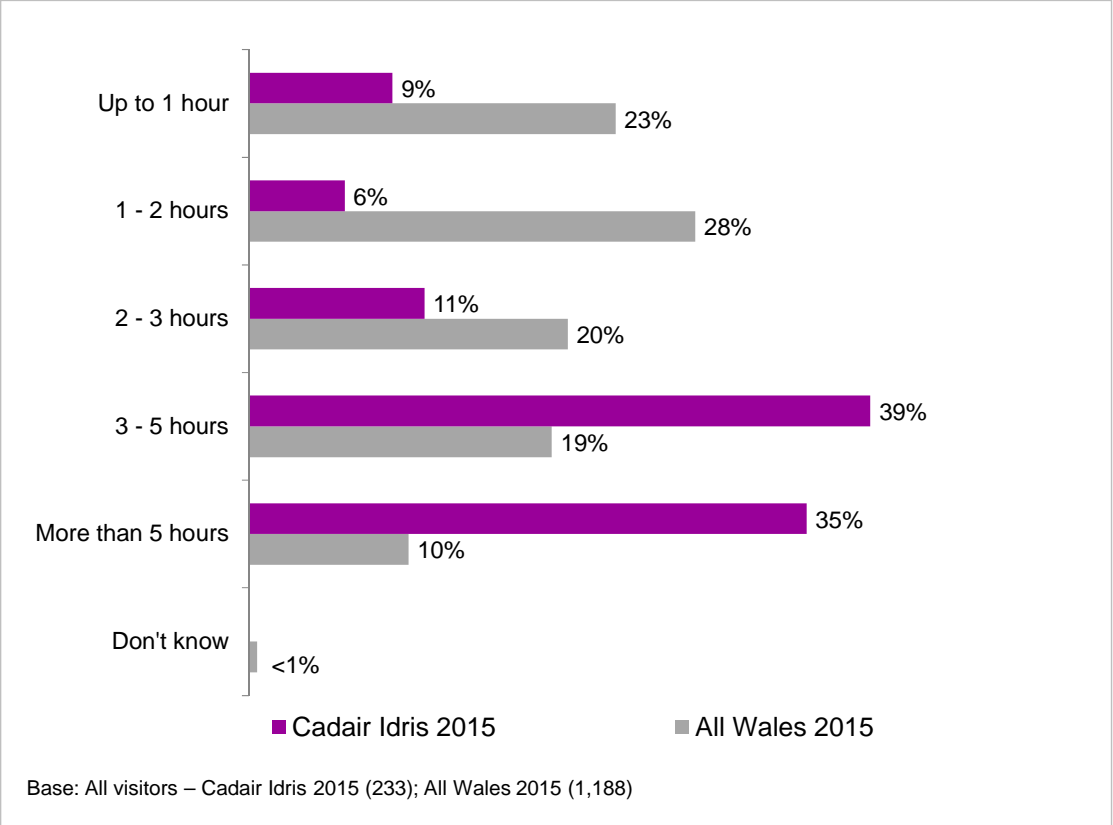
4.4 Length of visit

Visitors to Cadair Idris were at the site an average of 4 hours and 3 minutes; almost double the average length of stay across all sites in Wales (2 hours 24 minutes).

The varying lengths of time visitors spent at Cadair Idris can be seen below. As reflected in the average time at the site, most visitors reported that they had stayed more than 3 hours at the site (74%), with a roughly even split between those who had stayed 3-5 hours (39%) and those who had stayed more than 5 hours (35%). For all Wales, only 39% stayed at sites for more than three hours.

Around a quarter of visitors to Cadair Idris stayed at the site for less than three hours (26%); this is in stark contrast to the all Wales picture, where over seven in ten (71%) were on site for less than three hours - see Figure 6 below.

Figure 6: Q5. Approximate length of time spent at the site during visit



4.5 Activities undertaken

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

Table 4 comments on activities undertaken by 2% or more of visitors (with the exception of physical activities), and shows the combined figures for the following:

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

The most popular activity at Cadair Idris was walking generally (94%) - this was in line with the all Wales average of 92%. At Cadair Idris, as with all the Wales sites, using sign-posted trails was the most popular mode of walking (67% cf. 68% all Wales).

Cycling represented a very small percentage of activities at Cadair Idris (1%), but this was comparable to all Wales data (1%). Other physical activities such as running / jogging were only undertaken by a small proportion of visitors to Cadair Idris (4% cf. 2% all Wales); nobody took part in orienteering / Geocaching or horse-riding at this site.

Therefore, the vast majority of visitors took part in 'active' activities (98%): this proportion is in line with the all Wales figure of 93%. Only 27% took part in 'passive' activities, compared to an all Wales average of 59%.

Popular 'passive' activities at Cadair Idris included admiring the views (15%), photography (10%), using the café / restaurant / other catering (9%) and having a picnic or barbeque (8%).

Only relatively small proportions mentioned bird-watching and natural history visits (3% and 1% respectively), which is rather low given that the NNR status of this site - see Table 4 overleaf.

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

Activities undertaken	Cadair Idris 2015	All Wales 2015
	%	%
Cycling on forest roads, tracks or trails	<1	1
Cycling off trails or tracks	1	1
TOTAL CYCLING	1	1
Walking on a sign-posted trail	67	68
Walking but not following sign-posts	30	28
Dog walking	18	24
TOTAL WALKING	94	91
Orienteering / Geocaching	-	1
Running / jogging	4	2
Horse-riding	-	<1
Admiring the views	15	24
Photography	10	16
Using the café / restaurant / other catering	9	13
Picnic or barbeque	8	12
Using the Visitor Centre / shop	3	8
Bird watching	3	13
Nature / natural history visit	1	5
Organised trip / event	1	3
Camping	1	1
Swimming	1	<1
Taken part in ACTIVE activities	98	93
Taken part in ACTIVE activities	27	59

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

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

4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking running / jogging (10) and cycling activities (2), these have not been commented on.

As previously mentioned, visits to Cadair Idris lasted 4 hours and 3 minutes on average. Those walking spent an average of 4 hours and 1 minute doing this: this compares to the average time of 2 hours 11 minutes spent walking across all Wales sites.

As reflected in the average time spent walking at the site; the majority of walkers undertook this activity for over three hours (75%); with almost three in ten walking for longer than five hours (29%). Only a very small proportion of walkers took fairly short walks lasting up to an hour (8%) – see Table 5 below.

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

Time at site	Total duration of visit	Time spent on any walking
Up to 30 minutes	5	5
31 – 60 minutes	4	3
1 – 2 hours	6	4
2 – 3 hours	11	13
3 – 5 hours	39	46
5+ hours	35	29
Don't know	-	<1
AVERAGE	4 hours 3 mins	4 hours 1 min

Base: All respondents (233)

Respondents who walked (219)

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

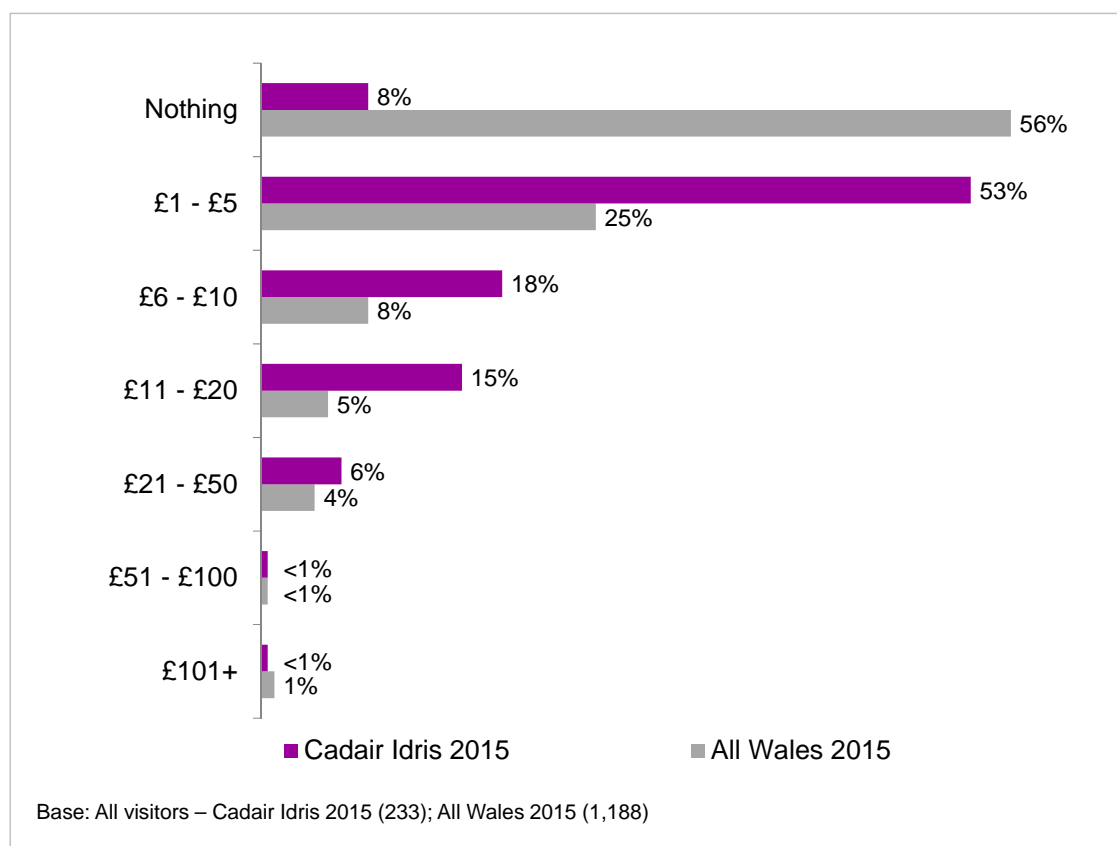
Visitors to Cadair Idris were asked how much they intended to spend at the site during their visit on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. The figures seen in Figure 7 show the figures calculated by combining the data across all types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

The majority intended to spend some money at the site (92%), although the amounts tended to be small; half of visitors to Cadair Idris intended to spend just £1 - £5 at the site during their visit (53%). In contrast, across all Wales sites, less than half (44%) said they would be spending any money at the site during their visit, with 25% saying they would be spending up to £5. The average spend at Cadair Idris was £10.00, while across all Wales sites it was £6.99.

At Cadair Idris, one in five visitors said that they would spend between £6 - £10 (18%), while a similar proportion said they would spend £11 - £20 (15%); only 7% claimed they would be spending more than £20 during their visit – see Figure 7 overleaf for more details.

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.

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



When looking at individual types of spending at the site, the item that the highest proportion of visitors to Cadair Idris were likely to spend anything on was parking, with nearly nine in ten (88%) planning to spend on this (average of £6.41, several pounds more than the all Wales average of £1.68).

The only other noticeable area of spend at the site was food and drink; two fifths of visitors (40%) were likely to spend an average of £3.57 on this, which was slightly higher than the all Wales average spend on food and drink of £2.16 – see Table 6a below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Cadair Idris %	All Wales %	Cadair Idris £	All Wales £
Food and drink	40	22	3.57	2.16
Activities at the site	-	1	-	1.56
Parking	88	27	6.41	1.68
Souvenirs / gifts	<1	3	0.04	0.41
Hiring equipment	-	1	-	1.11
Anything else	-	1	-	0.10

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

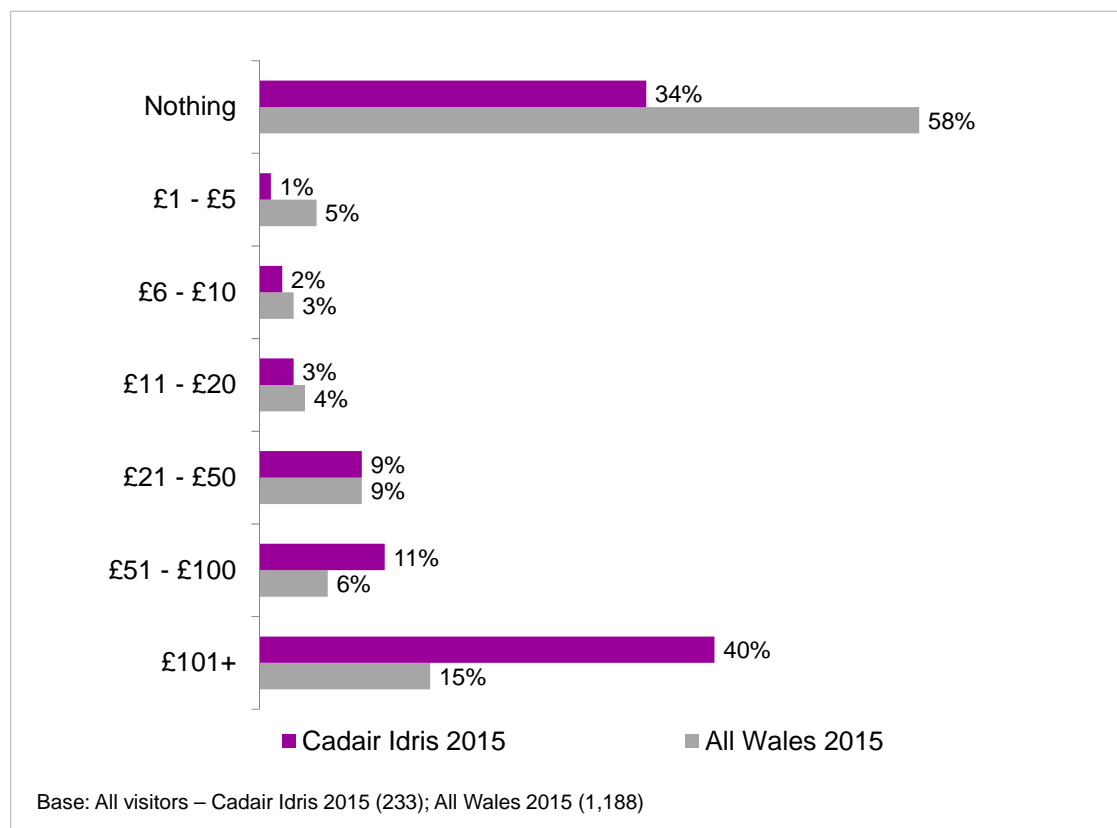
Visitors to Cadair Idris were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Figure 8 show the figures calculated by combining the data across all types of spending.

Just over a third of visitors to Cadair Idris claimed that they would not be spending anything in the area as a result of their trip (34%); therefore two thirds of visitor to Cadair Idris intended to spend money in the local area; higher than the all Wales average of 42%.

A relatively high proportion of visitors to Cadair Idris said that they would be spending a fairly large amount of money in the local area; 40% intended to spend more than £100 as a result of their visit to the site, resulting in an average spend of £247.32. Accommodations accounted for the highest average spend at this site, reflecting the higher than average proportion of staying visitors visiting this site (see Table 6b overleaf).

For all Wales, a significantly lower proportion (15%) intended to spend £101 or more in the area of the site (average £87.52). Figure 8 below provides more details.

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



Looking at spend in the local area as a result of their visit to Cadair Idris, accommodations and food and drink were mentioned by the highest proportion of visitors (50% for each). Visitors were likely to spend £139.00 on accommodations and £58.19 on food / drink.

Another third of visitors to Cadair Idris (33%) intended to spend on transport (£25.87 average), while one in five (18%) intended to spend on parking (£8.11 average). Smaller proportions intended to spend on souvenirs / gifts (7%), hiring equipment (5%) and anything else (7%).

The average spend in the area around Cadair Idris was higher than the all Wales average for all items – see Table 6b below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Cadair Idris %	All Wales %	Cadair Idris £	All Wales £
Food and drink	50	29	58.19	21.06
Accommodations	50	19	139.00	51.81
Admissions to other attractions	13	4	18.22	3.99
Parking	18	7	8.11	1.67
Transport	33	22	25.87	9.15
Souvenirs / gifts	7	4	5.60	1.65
Hiring equipment	5	1	5.86	1.82
Anything else	7	2	5.12	1.02

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

5. Perceptions of the site

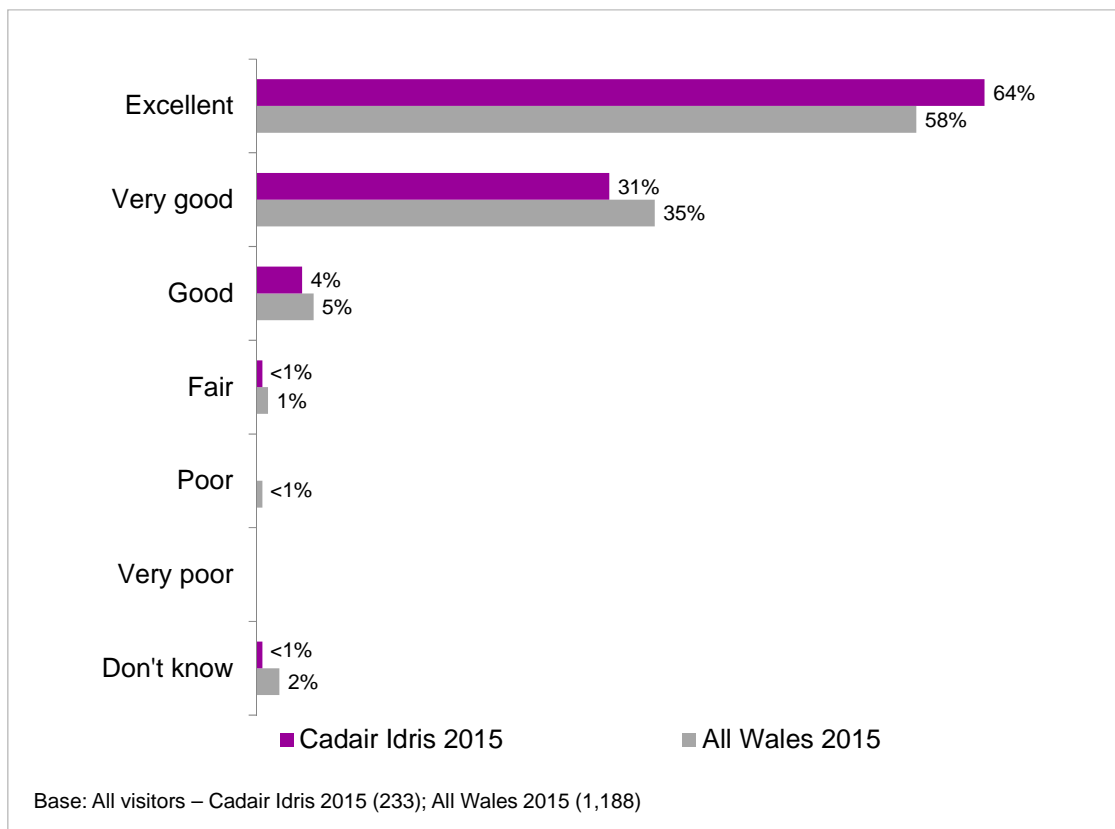
5.1 Overall rating of the site as a place to visit

Perceptions of Cadair Idris as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Cadair Idris in gave a negative rating of the site.

Two thirds (64%) rated the site as 'excellent', which is slightly higher than the all Wales figure (58%). A further third (31%) gave the site a rating of 'very good' and 4% rated it as 'good' (both in line with the all Wales figures of 35% 'very good' and 5% 'good').

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 95%, in line with the all Wales data (93%) – see Figure 9 below.

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



5.2 Overall rating of the site as safe and welcoming

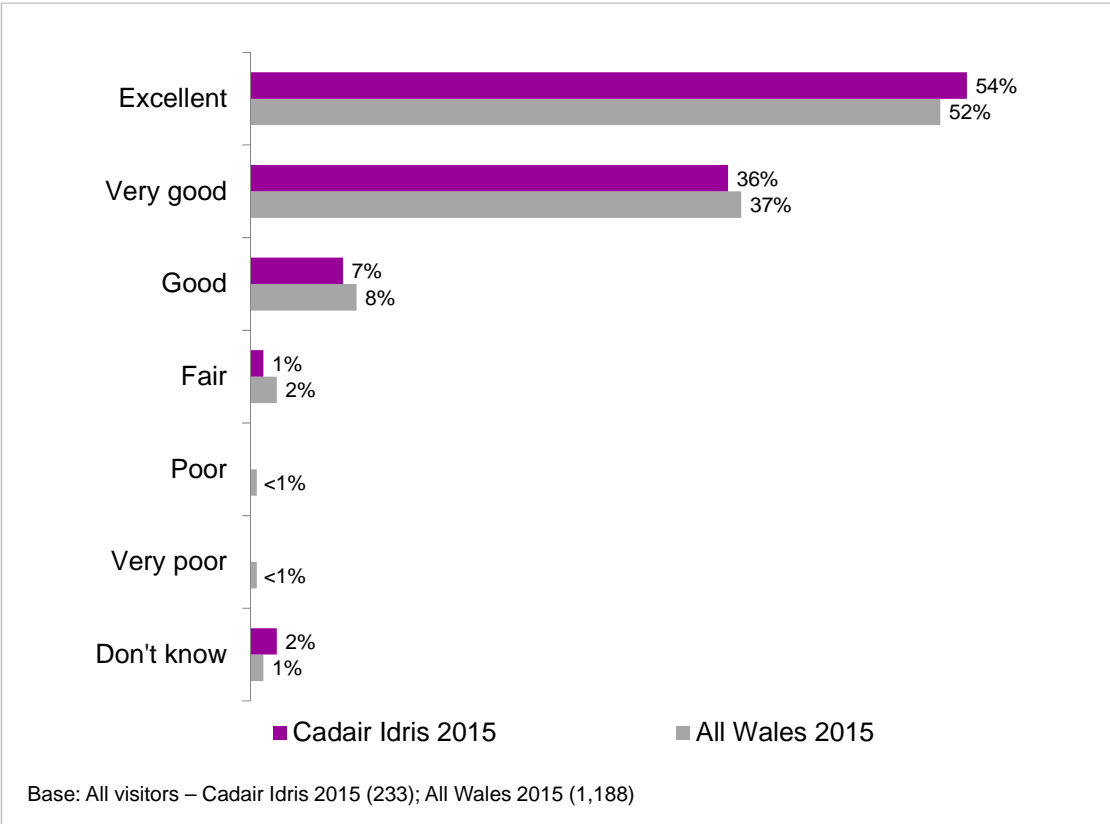
Similarly, ratings of how safe and welcoming Cadair Idris felt were also very positive, which was also the case across all Wales sites. None of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just over half the visitors gave this measure an 'excellent' rating (54%); this is in line with the figure obtained for all Wales sites (52%).

Another third (36%) gave a 'very good' rating for how safe and welcoming Cadair Idris felt (compared to 37% across all Wales sites). Just under one in ten (7%) gave a 'good' rating (8% all Wales).

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 90%, in line with the all Wales data (89%) – see Figure 10 below.

Figure 10: Q11. Rating of the site in terms of how safe and welcoming it feels



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

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

The scenery, views and beautiful environment were mentioned by most visitors (43%), whilst 38% said that Cadair Idris was peaceful, tranquil and relaxing. The beauty and tranquillity of Cadair Idris were favoured slightly more at Cadair Idris compared to all sites in Wales.

Around a quarter said that the site both well laid out (25%) and well signposted (24%), while a fifth felt that it had good quality facilities and amenities (21%); this latter finding was significantly higher than the all Wales average of 12%.

While 17% felt that Cadair Idris provided a generally safe environment, this was significantly lower than the all Wales figure of 38% - see Table 7 below.

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

Reasons for a positive rating of site	Cadair Idris 2015 %	All Wales 2015 %
The scenery / views / beautiful environment	43	40
Peaceful / pleasant / tranquil / relaxing / welcoming	38	34
Well laid out / well organised / good set up	25	27
Well signposted / good maps / information boards	24	26
Good quality facilities or amenities	21	12
Safe environment generally	17	38
Fresh air / open space / plenty of space / freedom / large area / vast	16	24
Good provision of paths, trails and tracks	12	21
Clean / tidy / well maintained / litter free	12	23
Other visitors here are friendly	6	10
Good car parking (good with horse box)	5	3
Plenty of other people around	4	1
Good, safe place for the kids to play and run around	3	14
Good café / good catering	3	1

Reasons for a positive rating of site continued..	Cadair Idris 2015 %	All Wales 2014 %
Friendly / helpful staff or rangers	2	8
Away from roads / no cars / cars drive slowly	2	1
Not too crowded / not too busy	2	1
Don't know	4	3
General positive comments	3	3
Some negative comments	7	5

Base: Visitors rating the site as excellent, very good or good – Cadair Idris 2015 (233); All Wales 2015 (1,175)

Negative comments given by a small proportion of visitors included:

- Some paths are difficult / dangerous (steep drops, loose shale) – 3%
- Needs better signage (more description, clearer, more signs in general) – 2%
- Not as safe as it used to be / feel vulnerable – 1%
- Other general negatives (not coded) – 3%.

There were a few aspects mentioned by one or two visitors:

- Live locally / convenient / easy to get to / easy access / close to me
- Easily accessible for wheelchairs / pushchairs
- Not as safe as it used to be / no cameras / security / felt vulnerable.

5.3 Recommending the site as a place to visit

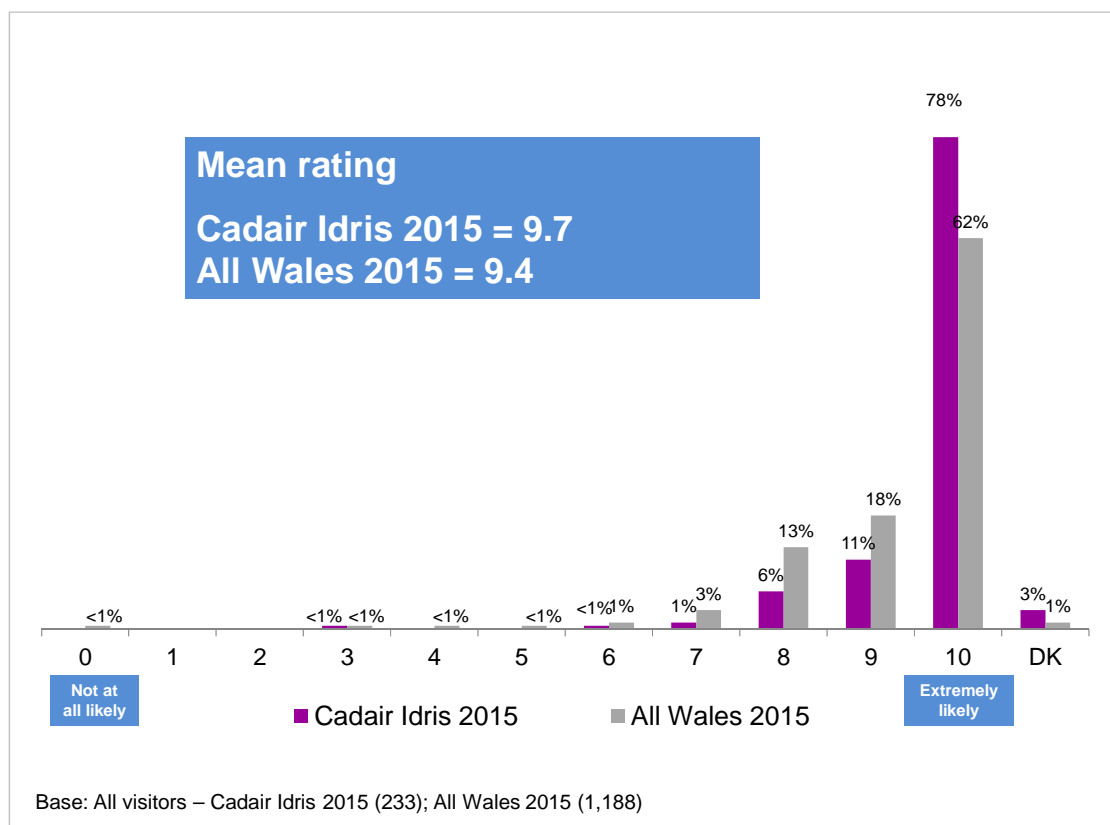
Visitors were asked whether they would be likely to recommend Cadair Idris as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Cadair Idris and all Wales sites generally were extremely positive: only 2% gave a rating of less than 8/10 for Cadair Idris (6% across all Wales sites gave a rating of less than 8/10).

Over three quarters (78%) gave a rating of 10, which was significantly higher than the all Wales average (62%).

This was reflected in the mean scores, with Cadair Idris standing at 9.7, compared with all Wales at 9.4 – see Figure 11 overleaf.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Cadair Idris is 88, which is higher (by 9 points) than the all Wales score of 79.

5.4 Strengths of the site

Visitors to Cadair Idris were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 8 below (compared to the all Wales average).

Three favourite things about Cadair Idris stood out; the most mentioned (by eight in ten) was scenery and beautiful views' (82%), followed by around half mentioning walks, paths and trails (55%) and the peace and tranquillity of the site (52%). A significantly higher proportion of visitors to Cadair Idris favoured the scenery at this site compared to all Wales sites (62%) – see Table 8 below for more details.

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

Favourite things about the site	Cadair Idris 2015 %	All Wales 2015 %
Scenery / views / beautiful/ natural / non-commercial	82	62
Walks / paths / trails	55	42
Peace / tranquillity / relaxation / atmosphere	52	56
Good on-site facilities / BBQ areas / Gift Shop	17	9
Fresh air / being outside	15	24
Exercise / keeping fit	8	15
Like forests / trees / variety of trees / plants	8	16
Close to home / convenient / location	7	16
Wildlife / bird watching	6	21
Clean / well looked-after	5	16
Rivers / creeks / waterways	5	10
Plenty / cheap / other reference to parking	4	3
Good accessibility	4	3
Challenging environment / wilderness	4	1
Been before / wanted to come again	2	12
Café / restaurant	2	1
Activities that are good for the children	2	9
Safe environment	2	9
Lots to see and / or do	2	5
Nothing	-	<1
Don't know	-	<1

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

There were a few favourite things mentioned by one or two respondents:

- Opportunity to spend time with family / friends / family friendly
- The weather
- Ideal for dogs / dog friendly / safe for dogs
- Not crowded / not too many people
- Something for everyone
- Helpful / pleasant staff
- Good toilets
- Fishing
- Well-signposted
- Well laid out
- Remote / away from traffic.

5.5 Areas for improvement

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. Over half of visitors to Cadair Idris could not think of anything that would add to their enjoyment and only made positive comments (58%). This was slightly higher than the all Wales average of 53%, illustrating that fewer visitors to Cadair Idris had any issues with the site, compared to all Wales sites in general.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. The most frequently mentioned improvement related to improving the signage at the site: 9% of visitors wanted to see better signs and maps, or more signs and maps. A similar proportion (8%) felt that the parking could be improved, with more spaces and lower charges (please note that the car park at Cadair Idris is owned and run by Snowdonia National Park Authority rather than Natural Resources Wales).

Only around one in twenty felt that the toilets could be improved (4%). The same proportion hoped for better weather (4%) – see Table 9 overleaf.

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

Suggested improvements	Cadair Idris 2015 %	All Wales 2015 %
Nothing / general positive comments	58	53
Improve signage / more maps / better maps	9	6
Better parking (easier, more, cheaper, free)	8	4
Improve toilets / more toilets / changing area	4	8
Better weather / more sunshine	4	2
Fewer people / fewer cyclists	3	1
More bins / litter bins / recycling bins / less litter	3	9
Improve maintenance of paths / cycle tracks / better surfacing	3	2
Have cashpoint / accept card payments	2	1
Better access / make more accessible (including disabled access)	2	1
Longer opening hours (shop / café / main gates)	2	1
Don't know	<1	1

Base: All visitors – Cadair Idris 201 (233); All Wales 2014 (1,188)

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

- More information on wildlife / vegetation / area
- More activities for children / more play areas
- More trails / paths / cycle tracks
- More dog poo bins / remove dog poo
- Improve café / catering
- Longer / more challenging paths, tracks and trails
- More seating
- More sheltered areas
- Easier / less challenging paths, tracks and trails
- Provide café / catering.

On a similar note: when asked if there was anything that interfered with their enjoyment of their visit to Cadair Idris, three quarters (73%) reported that nothing had. This was higher than the all Wales average of 68%, again illustrating that visitors to Cadair Idris found fewer issues with this site compared to all Wales sites in general. The comments made were mentioned by very small proportions, and Table 10 below details those made by 2% of the sample or more.

Issues with the car park were mentioned by the highest number of visitors (7%); 4% had issues with the car park in terms of faulty machines and limited car parking spaces, and a further 3% felt that the car park was too expensive and should be free.

Another 6% were disappointed with the weather during their visit, while 3% felt that some of the paths were too difficult or dangerous, with steep drops and loose shale.

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

Problem areas	Cadair Idris	All Wales
	2015 %	2015 %
Nothing	73	68
Wet / raining / windy (poor weather)	6	8
Problems with car parks / faulty machines / limited spaces	4	2
Some paths are difficult / dangerous (steep drops, loose shale)	3	1
Car parking expensive / should be free parking	3	1
Don't know	-	<1

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

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

- Signs unclear / need better signs / more maps
- Poor service in café / long queues / inconvenient opening hours
- Need more litter bins / recycling bins / too much litter
- Noisy (low flying aircraft / jets or road)
- Poor maintenance of the site (paths, fences, waterways)
- Too busy / too many kids
- Toilets – not enough / closed / out of order / cleaner toilets / no changing
- Need more dog poo bins
- Complaints about other visitors
- Dogs off leads / running loose / don't want dogs around
- Lack of information / education about nature, forest, history
- Problems getting around the site (trails closed, disabled access)
- Midges.

6. Site facilities

6.1 Importance of site facilities

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

Walking trails were mentioned by the highest proportion of visitors to Cadair Idris (64%): this figure was identical to the all Wales average (64%).

Car parking was mentioned by just over half of visitors (51%), again in line with the all Wales average of 48%, and a quarter mentioned that toilets at the site were important to them (24%); this was significantly higher than the all Wales figure of 10%.

Roughly one in six said that it was important to them that the site was a National Nature Reserve, or that there was a café / restaurant / other catering at the site (16% and 15% respectively). While these site averages are higher than the all Wales averages (5% and 6% respectively), this is not surprising, as only two sites included within the 2015 research were National Nature Reserves or had a café / restaurant / other catering on site – see Figures 12a and 12b overleaf for more details of the relative importance of various facilities at Cadair Idris.

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

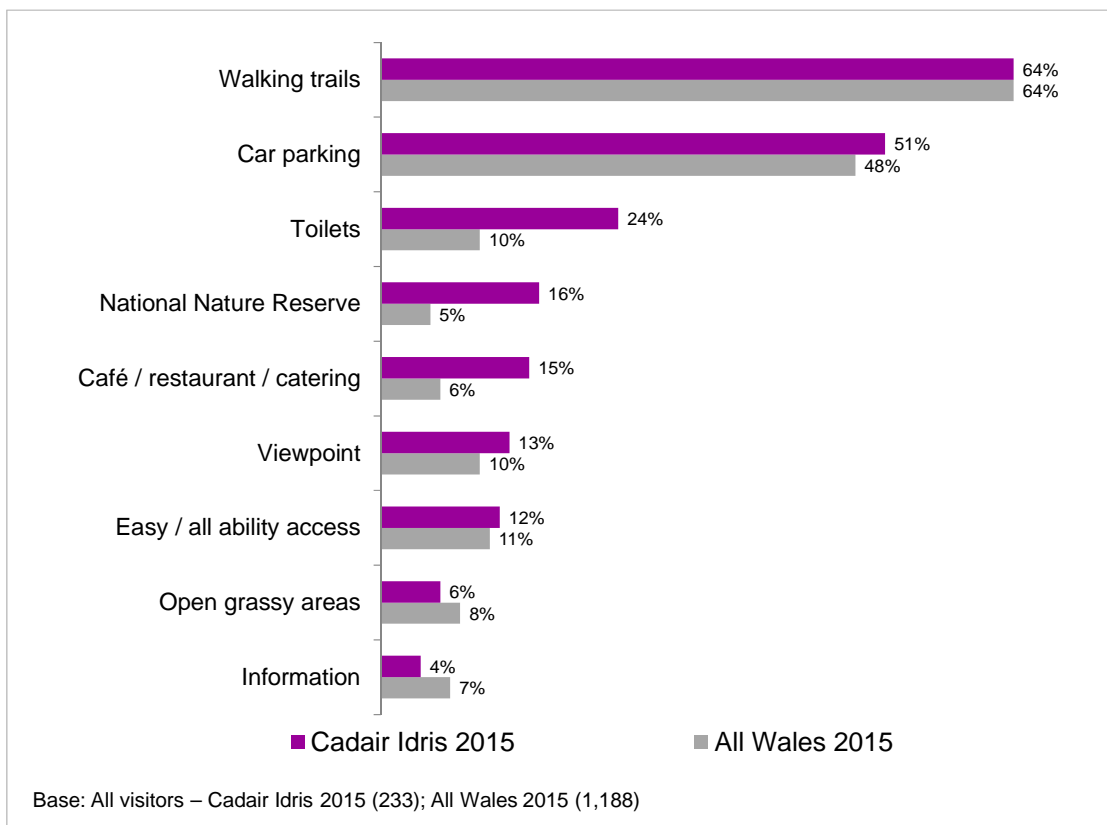
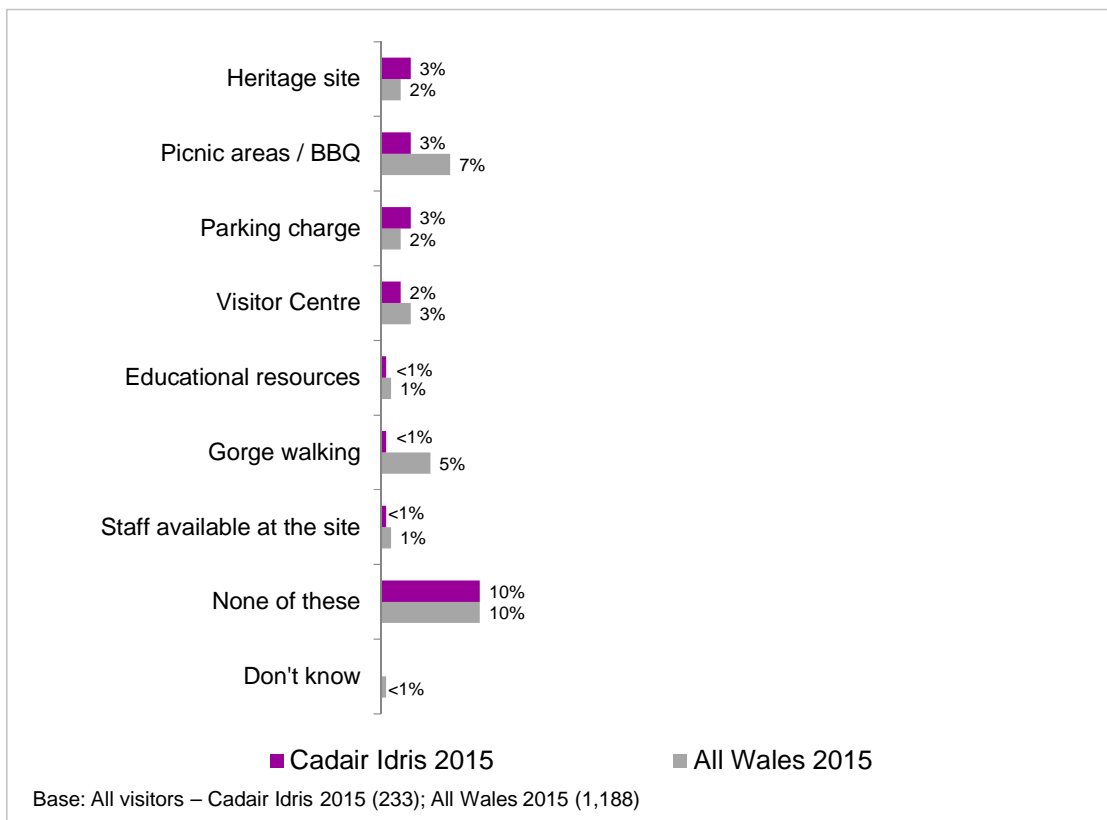


Figure 12b: Q13. Importance of different facilities in deciding to visit the site continued...



Certain other factors (apart from site facilities) were important to around a quarter of visitors when choosing to come to the site (27%). Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

The location of the site was mentioned by most visitors (9%); 6% (who were staying visitors) said that the site was close to their holiday accommodation, or close to where their parents lived. Another 3% (who were day trippers) said that the site was close to where they lived.

A small proportion of 3% of visitors said that the fact they were just passing the site had influenced their decision to visit, while 2% mentioned that they had been before and wanted to come again, that they felt like going walking or cycling, or that they had come for the beautiful scenery – see Table 11 below.

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

	Cadair Idris 2015 %	All Wales 2015 %
Nothing	73	53
Close to where I am staying (staying visitors) / parents live locally	6	3
Local / close to home / convenient	3	5
Was just passing by / en route / was in the area	3	2
Wanted to go walking / cycling	2	4
Negative comments / recommendations	2	1
Been before / come here a lot / good memories	2	2
Beautiful scenery / views / natural beauty	2	4
Good facilities	2	4
Don't know	1	1

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

Other factors were mentioned by one or two visitors:

- Site specific event (e.g. Race for Life)
- Read about the site on website / magazine
- Dog friendly / dogs can come off leads / dog facilities
- Meeting / visiting with family and friends (bring family)
- Good parking / cheap / free
- Good weather / sunny / warm
- A nice day out
- Friend / family / B&B owner recommended it
- Not too busy
- To see wildlife / birdwatching (includes feeding the ducks).

6.2 Facilities used

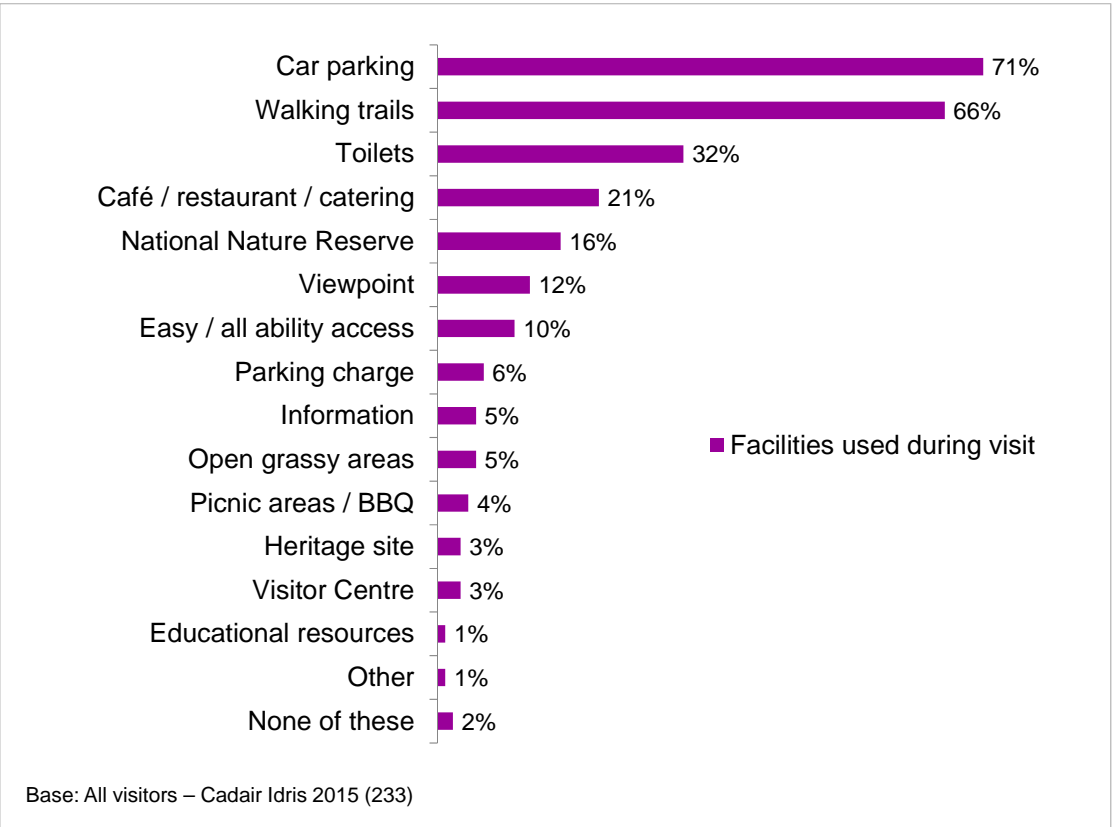
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The facilities used reflected to a large extent visitors' views of the importance of facilities. Parking was used by the highest proportion of visitors (71%), followed by walking trails (66%).

The toilets were used by just under a third of visitors to Cadair Idris (32%), while around a fifth used café / restaurant / catering (21%).

Facilities used by smaller proportions of visitors included the National Nature Reserve (16%), Viewpoint (12%) and easy / all ability access (10%) – see Figure 13 below for more details.

Figure 13: Q15a. Facilities used at Cadair Idris 2015



6.3 Rating of site facilities

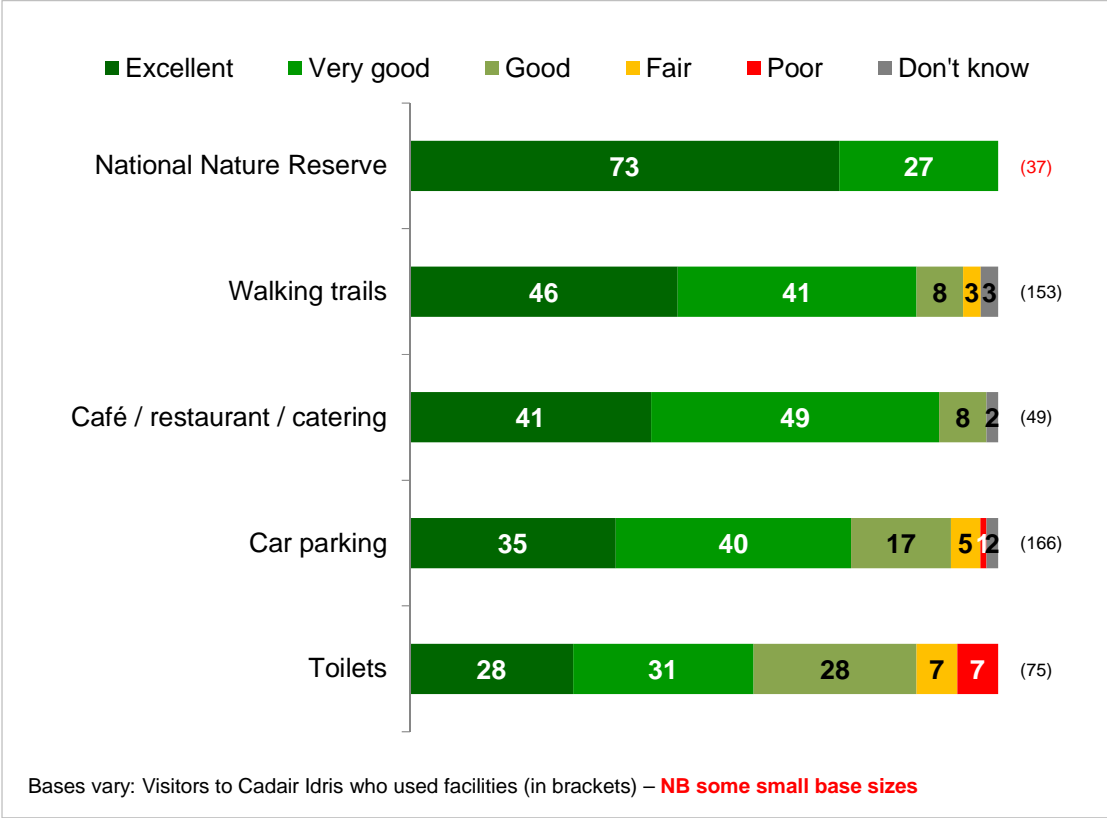
Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by 30 or more visitors to Cadair Idris have been detailed in Figure 14 below. Ratings of most of the facilities were positive, with the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

The facility that received the highest score was the National Nature Reserve. Three quarters rated this as ‘excellent’ (73%) whilst the remainder rated it as ‘very good’ (27%). The walking trails and café / restaurant / catering also received very high scores: around half rated the walking trails as ‘excellent’ (46%) whilst 41% said the same of the café / restaurant / catering.

Around a third rated the car park as ‘excellent’ (35%) whilst most of the remaining users rated this as ‘very good’ or ‘good’ (57%).

The facility that received the least positive rating was the toilets: while the majority rated these positively (87% saying ‘excellent’, ‘very good’ or ‘good’), another 7% rated these as ‘fair’, and the same proportion said that they were ‘poor’ – see Figure 14 below.

Figure 14: Q15b. Rating of Cadair Idris site facilities (where used) 2015 – main facilities used



7. Sources of information used to plan visit

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

Most visitors had always known about the site (57%), while a sixth of visitors heard about Cadair Idris through word of mouth (14%).

The third main source of information used to find out about Cadair Idris was either Google or another online search engine (10% vs. 7% all Wales). Search engines were much more likely to be used by first-time visitors (21%) than repeat visitors (2%).

Other sources of awareness included just passing / en route and maps (6% for each), websites (5%), and printed materials such as leaflets (3%) and books (2%) – see Table 12 below.

Table 12: Q7 – How found out about the site as a place to visit – main mentions

Sources of information	Cadair Idris 2015 %	All Wales 2015 %
Always known about it / been here before	57	52
Word of mouth	14	21
Google / other search engine	10	7
Just passing / en route	6	5
Map	6	4
Websites	5	5
Leaflet	3	4
Book / guide book	2	2
Don't know	<1	<1

Base: All visitors – Cadair Idris 2015 (233); All Wales 2015 (1,188)

Other sources of information used by one or two visitors included:

- Road signs
- Tourist Information Centres
- Organised events
- Accommodation provider.

8. Visiting other areas and attractions

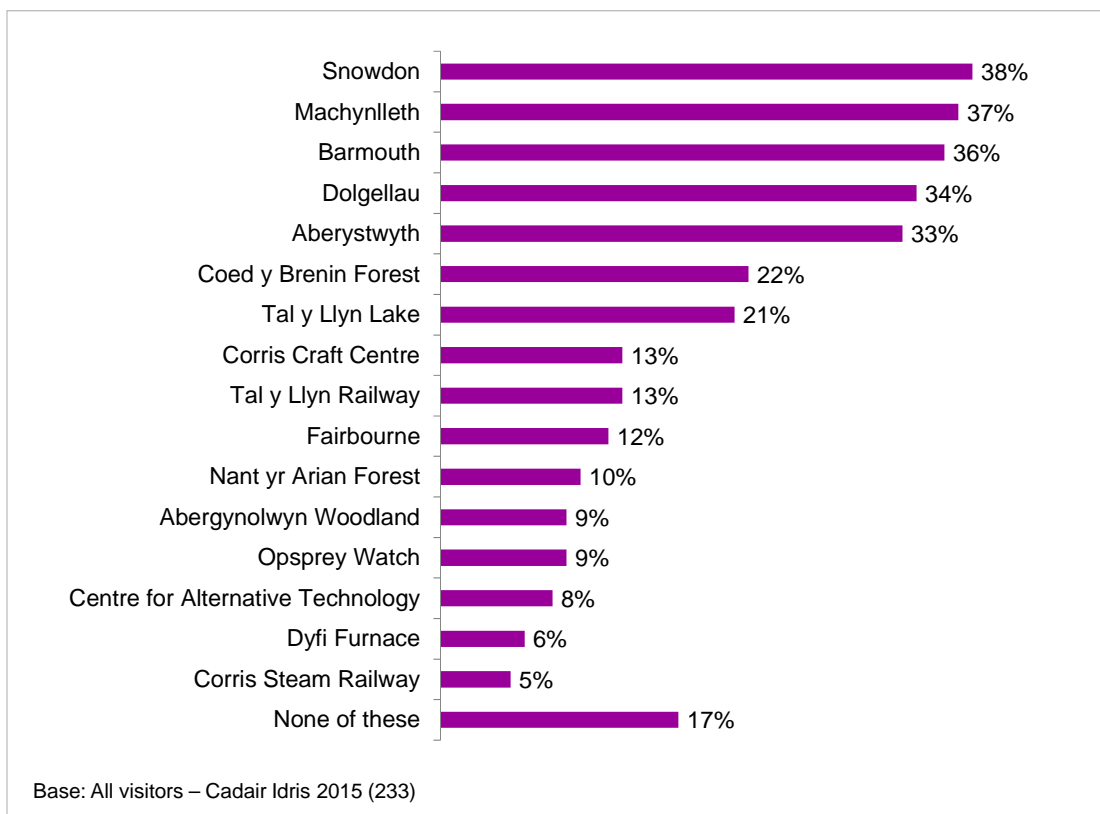
Visitors to Cadair Idris were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: most visitors (83%) had visited at least one.

Five specific locations stood out as being visited by the highest proportions (roughly a third of visitors for each). These were Snowdon (38%), Machynlleth (37%), Barmouth (36%), Dolgellau (34%) and Aberystwyth (33%).

Another fifth of visitors to Cadair Idris had also visited Coed y Brenin Forest (22%) and Tal y Llyn Lake (21%).

The attractions / areas mentioned by smaller proportions of visitors were Corris Craft Centre and Tal y Llyn Railway (13% each), Fairbourne (12%) and Nant yr Arian Forest (10%) – see Figure 15 below for more details.

Figure 15: Q19. Other areas / attractions visited 2015



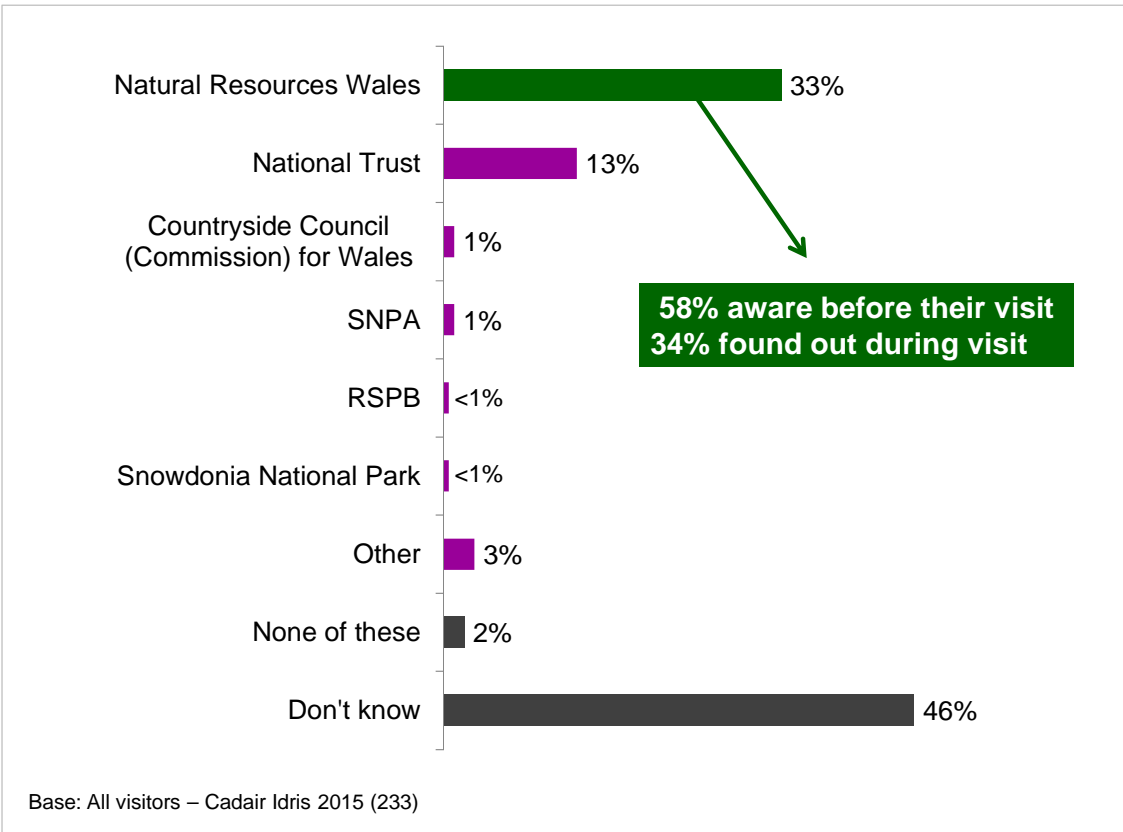
9. Awareness of NNR status and managing organisation

Just over two thirds of visitors knew that Cadair Idris was a National Nature Reserve before their visit (68%), although a sizable minority of 32% did not. Awareness of this was relatively high amongst first-time visitors (55%), although it was predictably higher amongst repeat visitors (77%).

A third of visitors to Cadair Idris knew that the site was managed by Natural Resources Wales (33%); several visitors had misconceptions on this, with many of these (13%) under the impression that the site was managed by the National Trust.


Amongst those who were aware that Cadair Idris was managed by NRW, the majority knew this before they arrived (58%), while 34% discovered this during their visit – see Figure 16 below.

Figure 16: Q20b / Q20c. Awareness of organisation managing Cadair Idris



Appendix I

Questionnaire

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

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

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

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

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

(7)
1
2
3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

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

- English
- Welsh

(8)
1
2

ASK ALL

Q1 Can I just check how many people there are in total in your group?
WRITE IN NUMBER FOR EACH GROUP – IF NONE RECORD Ø

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

(9-10)
(11-12)
(13-14)
(15-16)

SHOWCARD A

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

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

(17)
1
2
3
4
5

SHOWCARD B

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

First visit

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

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

ASK ALL

SHOWCARD C

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

PROBE - Any others?

RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

Q4b And which of these activities have other members of your group taken part in during your visit here today? **PROBE** - Any others?

RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED

ASK ALL

SHOWCARD C AGAIN

Q4c And which of these activities are you (**IF PART OF GROUP:** or other members of your group) **planning** to take part in during your visit here today? **PROBE** - Any others?

RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED

		(20-23m)	(28-31m)	(36-39m)
		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>	<p>(55-58m)</p>
<p>Always known about it / been here before Word of mouth Newspaper Leaflet Tourist Information Centre</p>	<p>1 2 3 4 5</p>
<p>Road signs Just passing / en route Map Smartphone app Facebook</p>	<p>6 7 8 9 A</p>
<p>Twitter Forestry Commission website Natural Resources Wales website Google / other search engine Other website (please specify) _____</p>	<p>B C D E X</p>
<p>Other (please specify) _____ Don't know / can't remember</p>	<p>(59-62m) X M</p>
<p>Q8 What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED</p>	<p>(63-66m)</p>
<p>Peace / tranquillity / relaxation Scenery / views / beautiful Walks / paths / trails Cycle trails / freedom / opportunity to cycle</p>	<p>1 2 3 4</p>
<p>Wildlife / bird watching Fresh air / being outside Exercise / keeping fit Activities that are good for the children</p>	<p>5 6 7 8</p>
<p>Close to home / convenient Opportunity to spend time with family / friends Safe environment Lots to see and / or do</p>	<p>9 A B C</p>
<p>Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after The weather</p>	<p>D E F G</p>
<p>Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money</p>	<p>H I J K</p>
<p>Other (please specify) ----- ----- Nothing Don't know</p>	<p>(67-70m) L M</p>

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 } **Q12**
3 }
4 }
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

CADAIR IDRIS

ASK ALL

SHOWCARD G1

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

CODE ALL MENTIONED

		(105-108m)
A	Café / restaurant / catering	A
B	Car parking	C
C	Easy / all ability access	H
D	Educational resources	I
E	Events	J
		(109-112m)
F	Heritage site	2
G	Information available / interpretation	5
H	National Nature Reserve	8
I	Open grassy areas	9
J	Parking charge	B
K	Picnic areas / BBQ	C
L	Staff available at the site	I
M	Toilets	K
N	Viewpoint	M
O	Visitor Centre	N
P	Walking trails	O
		(113-116m)

None of these

Don't know

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

Nothing

Don't know

(117-120m)

(121-124m)

M

N

CADAIR IDRIS

ASK ALL

SHOWCARD G1 AGAIN

Q15a Which aspects of the site have you used during your visit today? **PROBE** Any others?
RECORD IN COLUMN A – CODE ALL MENTIONED

SHOWCARD H

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

FOU: (140-231 FOR Q15)

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

ASPECTS USED	Q15a COL. A	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
	CIRCLE IF USED	Excellent	Very good	Good	Fair	Poor	Very poor	DK	
	(125-128m)								
A Café / restaurant / catering	A	1	2	3	4	5	6	7	(149)
B Car parking	C	1	2	3	4	5	6	7	(151)
C Easy / all ability access	H	1	2	3	4	5	6	7	(156)
D Educational resources	I	1	2	3	4	5	6	7	(157)
E Events	J	1	2	3	4	5	6	7	(158)
	(129-132m)								
F Heritage site	2	1	2	3	4	5	6	7	(165)
G Information available / interpretation	5	1	2	3	4	5	6	7	(168)
H National Nature Reserve	8	1	2	3	4	5	6	7	(171)
I Open grassy areas	9	1	2	3	4	5	6	7	(172)
J Parking charge	B	1	2	3	4	5	6	7	(174)
K Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
L Staff available at the site	I	1	2	3	4	5	6	7	(181)
M Toilets	K	1	2	3	4	5	6	7	(183)
N Viewpoint	M	1	2	3	4	5	6	7	(185)
O Visitor Centre	N	1	2	3	4	5	6	7	(186)
P Walking trails	O	1	2	3	4	5	6	7	(187)
	(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	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
- Good
- Fair
- Poor
- Very poor

Don't know / not sure

(235)

- 1
- 2
- 3
- 4
- 5
- 6
- 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, DON'T KNOW OR REFUSED, TICK APPROPRIATE BOX

ITEMS	£	Nothing	DK	Ref.	
Food and drink		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(237-240)
Activities available at this site		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(241-244)
Parking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(245-248)
Souvenirs / gifts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(249-252)
Hiring equipment such as boats, bikes or horses		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(253-256)
Anything else		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(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, DON'T KNOW OR REFUSED, TICK APPROPRIATE BOX

ITEMS	£	Nothing	DK	Ref.	
Food and drink		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(261-264)
Accommodation (if staying overnight)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(265-268)
Admission to other attractions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(269-272)
Parking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(273-276)
Transport, including public transport, taxis and petrol		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(277-280)
Souvenirs / gifts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(281-284)
Hiring equipment such as boats, bikes or horses		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(285-288)
Anything else		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(289-292)

CADAIR IDRIS

ASK ALL

FOU: (335-369 FOR Q19)

SHOWCARD K1a (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

- Abergynolwyn Woodland
- Aberystwyth (town)
- Barmouth (town)
- Centre for Alternative Technology
- Coed y Brenin Forest
- Corris Craft Centre
- Corris Steam Railway
- Dolgellau (town)
- Dyfi Furnace
- Fairbourne
- Machynlleth (town)
- Nant yr Arian Forest
- Osprey Watch (nr Machynlleth)
- Snowdon
- Tal y Llyn Lake
- Tal y Llyn Railway

- None of these
- Don't know

(335-338m)

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

- L
- M

FOU: (370-410 FOR Q20)

Q20a Before your visit here today, did you know that this was area was a National Nature Reserve?

- Yes
- No

- Don't know

(370)

- 1
- 2

- 3

SHOWCARD K1b (W)

Q20b Which of these organisations manages Cadair Idris?

CODE ALL MENTIONED

- Natural Resources Wales
- National Trust
- RSPB (Royal Society for the Protection of Birds)
- Wildlife Trust

Other (please specify) _____

(371-374m)

- 1
- 2 **Q20c**
- 3
- 4

- X

- None of these
- Don't know

- L **Q21**
- M

ASK IF 1-4 OR OTHER AT Q20b

Q20c Were you aware of this before your visit here today, or did you find this out during your visit here today?

- Aware before visit
- Found out during visit

- Don't know

(375)

- 1
- 2

- 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)
B01326-3	F.O.U (BACK CHECKS)		Accompanied	Yes 1 No 2	Supervisor signature

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

enquiries@beaufortresearch.co.uk
www.beaufortresearch.co.uk