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Research Report

Quality of the Visitor
Experience 2014

Clocaenog



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 2014, 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 136 visitor interviews conducted at Clocaenog 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 Clocaenog

Clocaenog Forest is part of Hiraethog Forest and has hundreds of hectares of forest over 50 years old with its nearest towns or villages being Ruthin, Cyffylliog, Clawdd Newydd and Clocaenog. Clocaenog Forest has some of the best and most well managed coniferous plantations in Wales which are believed to have the largest population of red squirrels in Wales.

Clocaenog Forest has a wide variety of activities available to visitors, including walking, horse riding, picnic sites, fishing, heritage and wildlife activities.

1.3 Perceptions of the site

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

Almost half (47%) rated the site as 'excellent', which is slightly lower than the all Wales findings (55%) and the previous study conducted at Clocaenog in 2011 (54%). A further two fifths (43%) gave the site a rating of 'very good' and 7% rated it as 'good'.

Similarly, ratings of how safe and welcoming Clocaenog was were also very positive. This was also the case across all Wales sites, and views were more positive in 2014 compared to 2011.

When asked whether they would be likely to recommend Clocaenog as a place to visit to a friend or relative (using a score of 0-10), scores for Clocaenog and all Wales sites generally were extremely positive. The average score for Clocaenog in 2014 was 9.2 out of 10, higher than the 2011 score of 8.8 but slightly lower than the all Wales average score of 9.4.

1.4 Strengths of the site

Two favourite things about Clocaenog stood out. The most mentioned (by three quarters of visitors) was the tranquillity, peaceful and relaxing atmosphere (76%), followed by the scenery and beautiful views (47%). One in four (40%) mentioned walks, paths and trails as favourite things, with one in five mentioning that they liked the forests, trees and the variety of plants (21%).

1.5 Areas for improvement

Nearly half of visitors to Clocaenog could not think of anything that would add to their enjoyment and only made positive comments (49%). This was similar to the all Wales average of 46%. The only prevailing aspects that needed attention was toilet facilities: 11% of visitors wanted to see these upgraded, or more toilets / showers / changing facilities around the site.

There were calls by small minorities for:

- Improved signage / more maps / better maps 10%
- More bins / litter bins / recycling bins / less litter 10%
- More dog poo bins / remove dog poo 8%
- Improve maintenance of paths / cycle trails / better surfacing 5%.

1.6 Visitor profile

The majority of visitors to Clocaenog had visited the site before (75%). This proportion was higher than the all Wales average of 71% who said they had been to their respective forest sites before.

Two thirds of visitors to Clocaenog had travelled less than 3 hours from their home to visit the site for a day trip (67%), with another 15% travelling for more than 3 hours. Only a small proportion of visitors to the site were staying in the area (17%).

The gender profile was slightly skewed towards more males than females (54% of visitors were men compared to 46% women). This was only marginally different from the all Wales figure (53% male and 47% female).

In terms of age, the Clocaenog visitors tended to be slightly older than the all Wales visitors. Around two in five (39%) of Clocaenog visitors were aged 16-44 years, compared with 42% all Wales, whereas 60% were aged 45+ (57% all Wales). The profile for working status of visitors to Clocaenog was also in line with the all Wales data, with most working full-time (59% Clocaenog; 56% all Wales).

Clocaenog visitors tended more towards the ABC1 socio-economic groups (73%), in line with the all Wales figure (72%).

Two fifths of visitors were Welsh speakers (21%): this is again in line with the all Wales proportion (22%).

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 Clocaenog, interviewing took place between 11th April and 11th October, and a total of 136 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Clocaenog 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 Clocaenog. 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 Clocaenog was largely in line with that of the visitors to all the Wales sites.

The gender profile was slightly skewed towards more males than females (54% of visitors were men compared to 46% women). This was only marginally different from the all Wales figure (53% male and 47% female).

In terms of age, the Clocaenog visitors tended to be slightly older than all Wales visitors. Around four in ten (39%) of Clocaenog visitors were aged 16-44 years, compared with 42% all Wales, whereas 60% were aged 45+ (57% all Wales). The profile for working status of visitors to Clocaenog was also in line with the all Wales data, with most working full-time (59% Clocaenog; 56% all Wales).

Clocaenog visitors tended more towards the ABC1 socio-economic groups (73%) similarly to the all Wales visitors (72%).

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

The overwhelming majority of visitors to Clocaenog were White British / Welsh / Irish (98%), with only a 1% of visitors describing their ethnicity as 'White other nationality'. None of the visitors to Clocaenog were 'Black / Asian / Mixed'.

Just over one in five visitors to Clocaenog spoke Welsh (21%): 10% fluently and 11% non-fluently. This is in line with the all Wales average of 22% Welsh speakers (11% fluent, 11% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2014

		Clocaenog %	All Wales %
Gender	Male	54	53
	Female	46	47
Age	16 – 24	4	3
	25 – 34	13	16
	35 – 44	22	23
	45 – 54	25	23
	55 – 64	14	17
	65+	21	17
	Refused	-	<1
Social class	AB	33	38
	C1	40	34
	C2	13	15
	DE	12	12
	Refused	2	1
Working status	Full-time employee (30+ hours per week)	59	56
	Part-time employee (<30 hours per week)	7	10
	Self-employed	7	7
	Full-time education	2	1
	Unemployed	1	1
	Permanently sick / disabled	2	2
	Retired	20	19
	Looking after home	1	2
	Other	-	<1
	Refused	1	1
Limiting illness	Yes – limited a lot	2	4
	Yes – limited a little	4	5
	No	91	90
	Refused	2	1
Children in household	Yes	27	34
	No	72	66
	Refused	1	<1
Ethnicity	White – British / Welsh / Irish	98	96
	White – Other	1	3
	Black / Asian / Mixed	-	1
	Refused	1	<1
Welsh speaker	Yes	21	22
	No	79	78

Base: All visitors – Clocaenog (136); All Wales (1,154)

3.2 Group profile

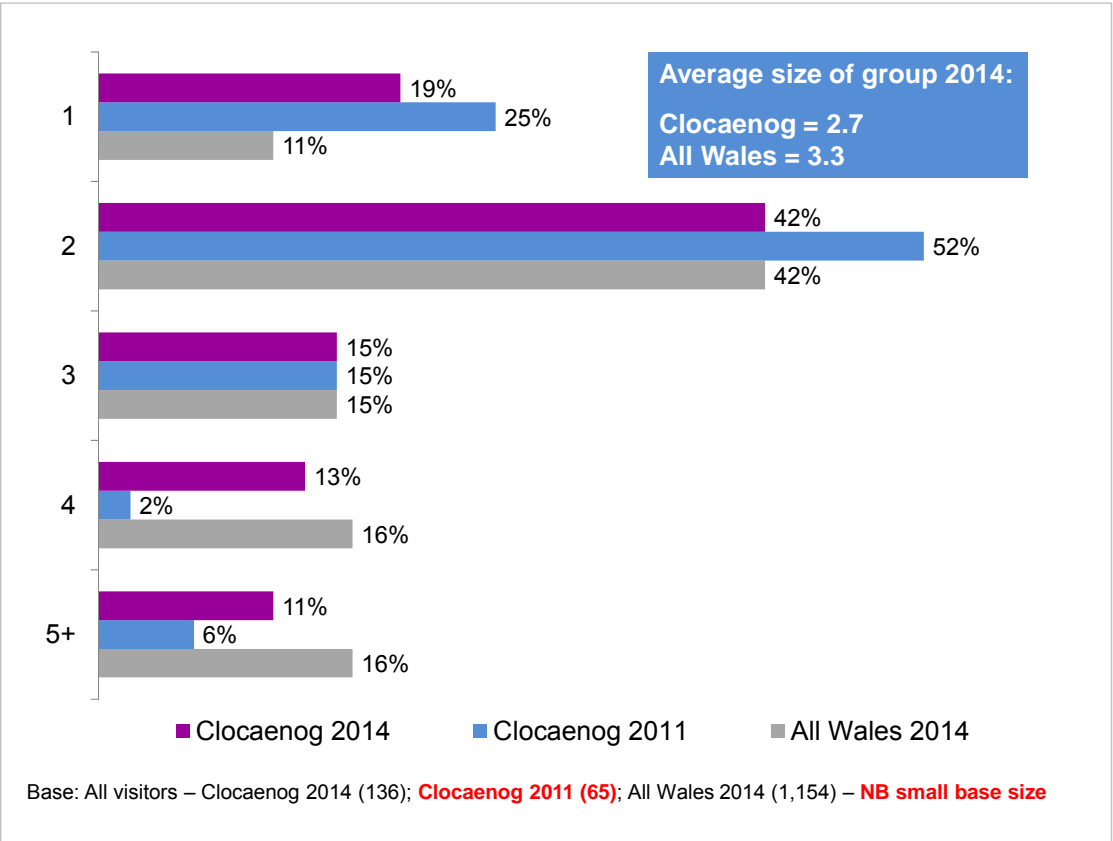
3.2.1 Size of group

Group sizes were smaller at Clocaenog (averaging 2.7 people), compared to the all Wales sample (which averaged 3.3 people).

The largest group by some margin, consisting of two fifths of Clocaenog visitors (42%), was made up of two people. This was much lower than the previous Clocaenog research in 2011 (52%) but it was exactly the same as the all Wales average (42%).

In 2011, visitor groups tended to be smaller: 25% of visitors were at the site alone (compared to 19% in 2014), and there was a considerable increase in the proportion of larger groups visiting Clocaenog, with 24% of visitors coming in groups of 4 or more people (8% in the 2011 research).

Figure 1: Q1. Total size of the group

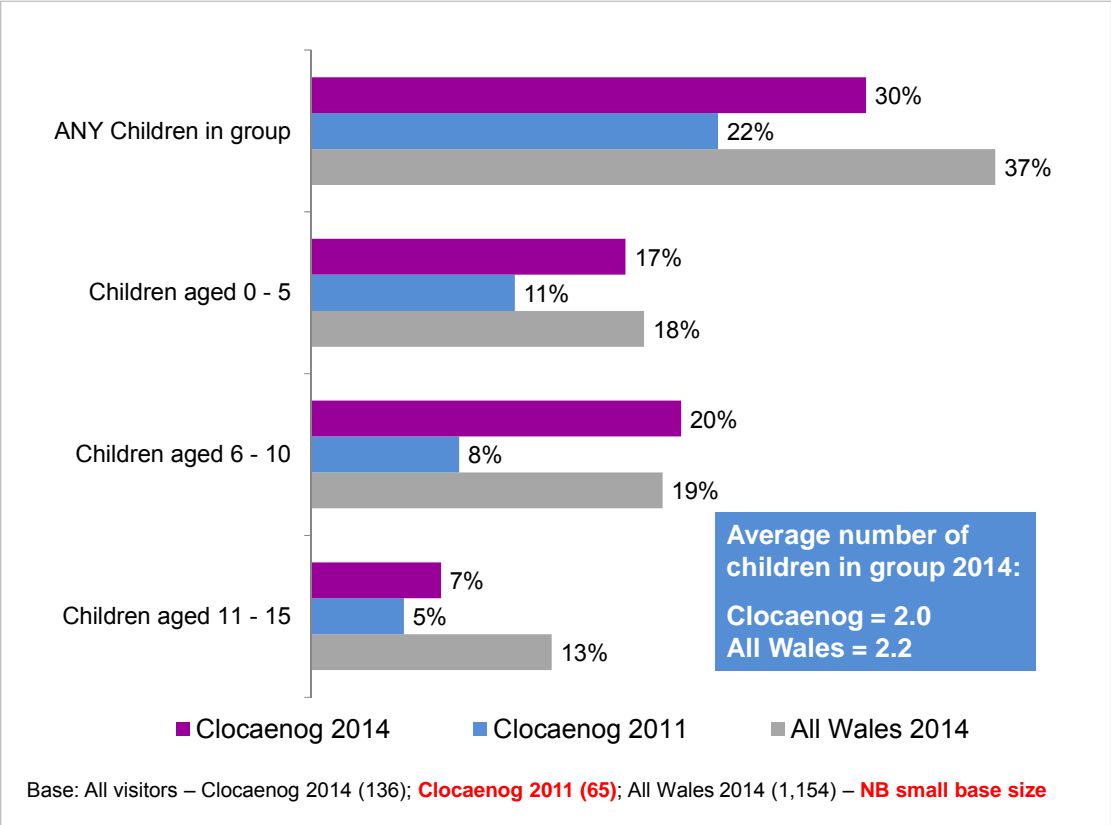


3.2.2 Composition of group

One third of the groups who visited Clocaenog contained children (30%). This was lower than the all Wales figure (37%) but higher than the comparative Clocaenog study conducted in 2011 (22%). The average number of children per group visiting Clocaenog in 2014 was consistent with the all Wales average (mean of 2.0 children per group at Clocaenog compared with 2.2 all Wales).

Children visiting Clocaenog tended to be 10 years old or younger (37%), with fewer older children compared to the all Wales average (7% in Clocaenog and 13% in the all Wales). There were more children aged 0-5 years visiting in 2014 (17%) compared to 2011 (11%), and the proportion of children between the age of 6 and 10 also increased significantly (20% in 2014 and only 8% in 2011).

Figure 2: Q1. Composition of group



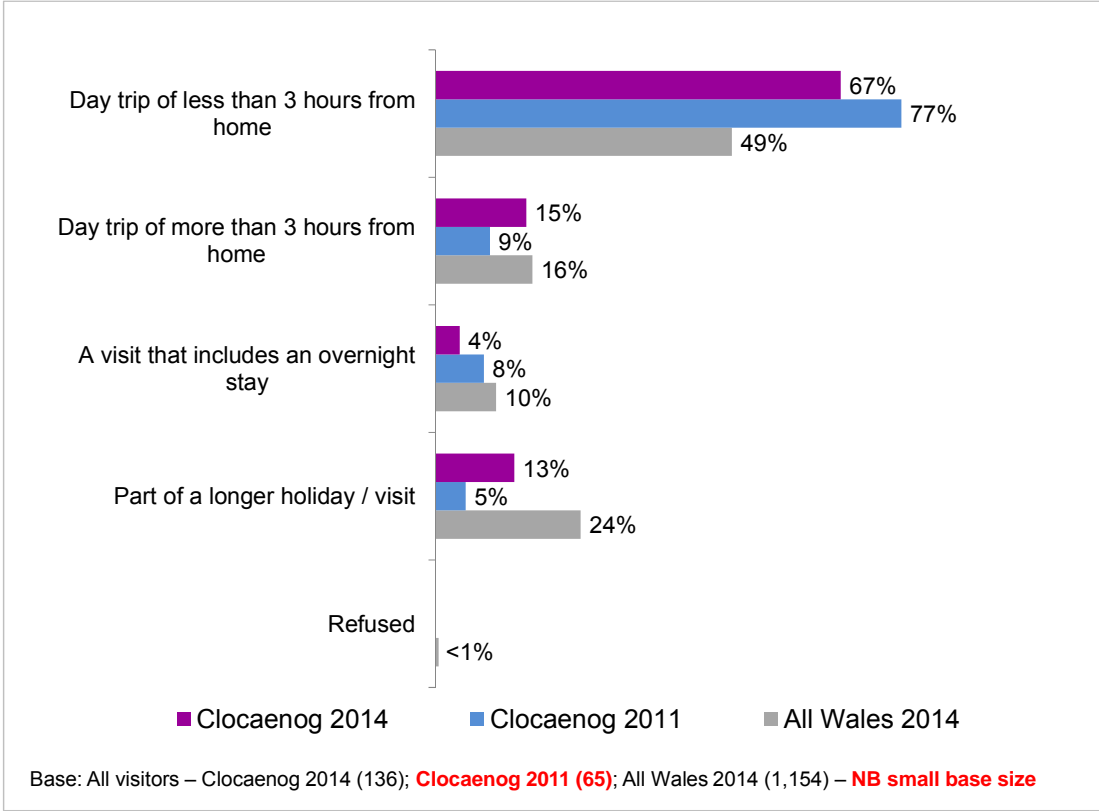
4. Profile of visit

4.1 Type of visit

Two thirds of visitors to Clocaenog had travelled less than 3 hours from their home to visit the site for a day trip (67%), with another 15% travelling for more than 3 hours.

Only a small proportion of visitors to Clocaenog in 2014 were staying overnight or as part of a longer holiday / visit (17%), which is higher proportion than in 2011 (13%) but much lower than the all Wales average (34%).

Figure 3: Q2. Type of visit



4.2 Visitor origin

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

Most visitors to Clocaenog came from Wales (70%), with virtually all of these coming from North Wales (68%) - this was a much higher percentage than the all Wales average (20%).

Most other visitors to Clocaenog came from England (29%), with another 1% from abroad – Table 3 below and Figure 4 overleaf provide more details.

Table 3: Q28b. Visitor origin 2014

		Clocaenog	All Wales
		%	%
Home region	North Wales	68	20
	Mid / West Wales	-	21
	South West Wales	2	5
	Valleys	-	10
	South East Wales	-	5
	Outside of Wales	30	40
Home nation	Wales	70	60
	England	29	38
	Rest of UK	-	<1
	Abroad	1	2
	Refused	-	<1

Base: All visitors – Clocaenog (136); All Wales (1,154)

Figure 4: Map of visitor origin for Clocaenog



4.3 Frequency of visits

4.3.1 First-time visitors

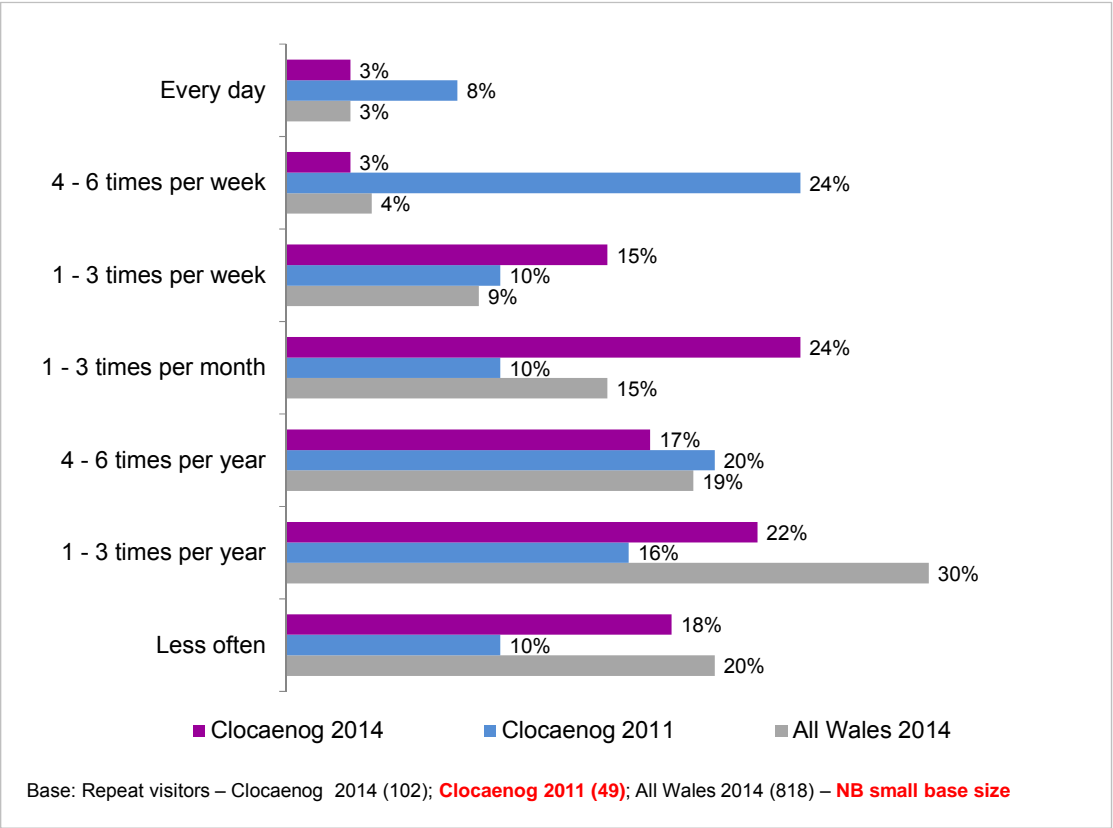
In 2014, a quarter (25%) of visitors to Clocaenog were first-time visitors (the same as the 2011 figure). This proportion was slightly lower than the all Wales average of 29% who said they had never visited their respective forest sites before.

4.3.2 Repeat visitors

Focussing on repeat visitors (75% of the sample): most visitors to Clocaenog were infrequent. Nearly six in ten (57%) visited 4 times a year or less often. However, the proportion of infrequent visitors to Clocaenog is lower than the all Wales average of 69% who visit 4 times a year or less often.

In 2011, twice the number of visitors were coming to the the site on a weekly basis (42%) compared to 2014 (21%).

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



4.4 Length of visit

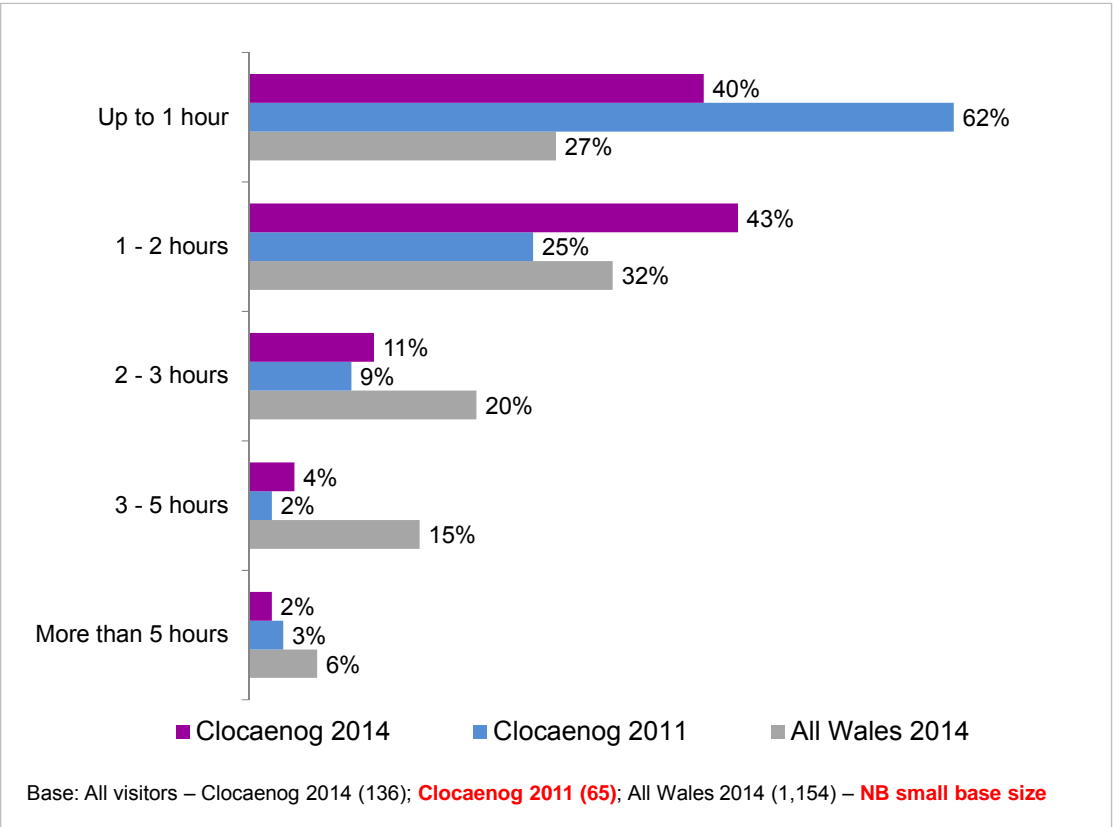
Visitors to Clocaenog were at the site an average of 20 minutes longer in 2014 than in 2011. In 2011 the average length of visit was 1 hour and 10 minutes, whilst in 2014 it was 1 hour and 30 minutes. The average length of stay across all sites in Wales was 2 hours and 7 minutes.

In 2011, most visitors were at the site for a fairly short period of up to an hour (62%), with a quarter staying for 1-2 hours (25%) and only a small proportion spending longer than two hours at the site (14%).

In 2014, smaller numbers stayed for less than an hour (40%), and more visitors were on site for 1-2 hours (43%).

On the whole, visitors to Clocaenog were more likely to be on-site for shorter periods than the all Wales average.

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



4.5 Activities undertaken

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

Table 4 shows the combined figures for the following:

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

The most popular activity at Clocaenog was walking generally (88%) - this was much higher than both the all Wales average (69%) and the 2011 figure (75%). Most of these walkers chose to follow sign-posted trails (55%): much higher than the 2011 figure (25%). Dog walking was also popular at the site (48%), more so than across all Wales sites (30%).

Other popular activities at Clocaenog in 2014 included having a picnic or barbeque (25%: up from 6% in 2011), admiring the views (23%: also up from 20% in 2011), Birdwatching and admiring nature and the natural history of the site (both 10%).

Cycling represented a very small percentage of activities at Clocaenog (6%), which is significantly smaller than both the 2011 data (20%) and the all Wales data (22%).

Other activities mentioned in 2014 that did not present themselves in the 2011 research included a forest drive, an organised trip / event (4% for both), and the use of the café / restaurant or the play area (1% for each).

The vast majority of visitors took part in 'active' activities (92%): this has increased significantly since 2011 and it is higher than the all Wales average (78% in 2011 and 87% for all Wales) – see Table 4 overleaf.

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

	Clocaenog 2014 %	Clocaenog 2011 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	5	11	15
Cycling off trails or tracks	3	12	11
TOTAL CYCLING	6	20	22
Walking on a sign-posted trail	55	26	42
Walking but not following sign-posts	18	8	12
Dog walking	48	55	30
TOTAL WALKING	88	75	69
Picnic or barbeque	25	6	17
Admiring the views	23	20	26
Nature / natural history visit	10	6	7
Bird watching	10	8	15
Photography	9	3	11
Seeing something in the forest	7	3	2
A forest drive	4	-	2
Organised trip / event	4	-	2
Horse riding / pony trekking	1	2	<1
Using the café / restaurant / other catering	1	-	33
Using the play area	1	-	15
Other	1	11	2
Taken part in ACTIVE activities	92	78	87

Base: All visitors – Clocaenog 2014 (136); **Clocaenog 2011 (65)**; All Wales 2014 (1,154) – **NB small base size**

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

4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking cycling activities (8 visitors), this has not been commented on.

As previously mentioned, visits to Clocaenog lasted 1 hour and 30 minutes on average. Those walking spent an average of 1 hour and 15 minutes doing this: a noteworthy 19 minute increase on the 2011 average of 56 minutes.

Two fifths of these visitors walked for around 1-2 hours (42%), while almost half the visitors to Clocaenog had walked for 60 minutes or less (48%).

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

	Total duration of visit		Time spent on any walking	
	2014 %	2011 %	2014 %	2011 %
Up to 30 minutes	8	22	14	23
31 – 60 minutes	32	40	34	48
1 – 2 hours	43	25	42	23
2 – 3 hours	11	9	8	6
3 – 5 hours	4	2	2	-
5+ hours	2	3	1	-
AVERAGE	1 hr 30 mins	1 hr 10 mins	1hr 15 mins	56 mins

Base: All respondents - 2014 (125); **2011 (65)**
 Respondents who walked - 2014 (117); **2011 (48)**
NB small base sizes

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

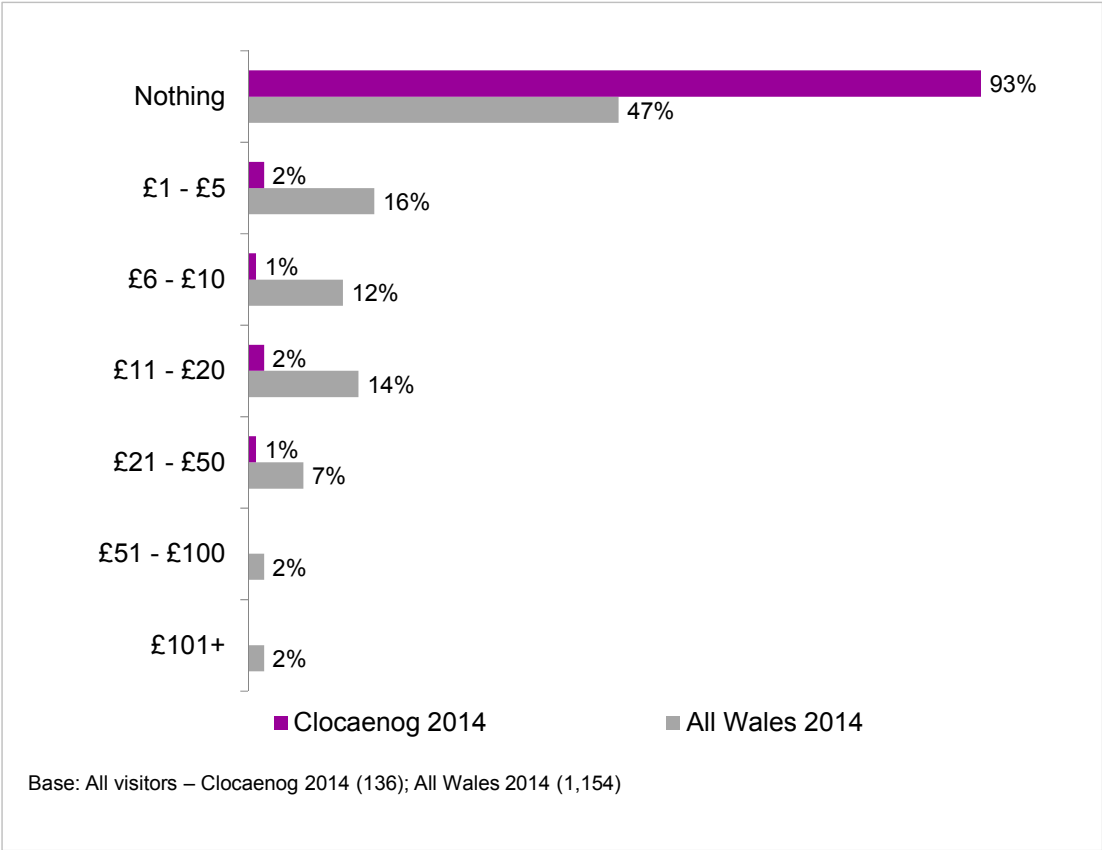
Visitors to Clocaenog were asked how much they had spent at the site during their visit, on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. The figures seen in Figure 7 show the figures calculated by combining the data across all types of spending.

The vast majority of the visitors interviewed (93%) said that they had not spent any money at the site during their visit – this was considerably higher than the all Wales figure of 47%.

Only 7% intended to spend any money at the site, and all of these would be purchasing food and drink, with an average spend of £1.23. This is lower than the all Wales average spend on-site of £11.15 (£5.53 on food and drink).

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



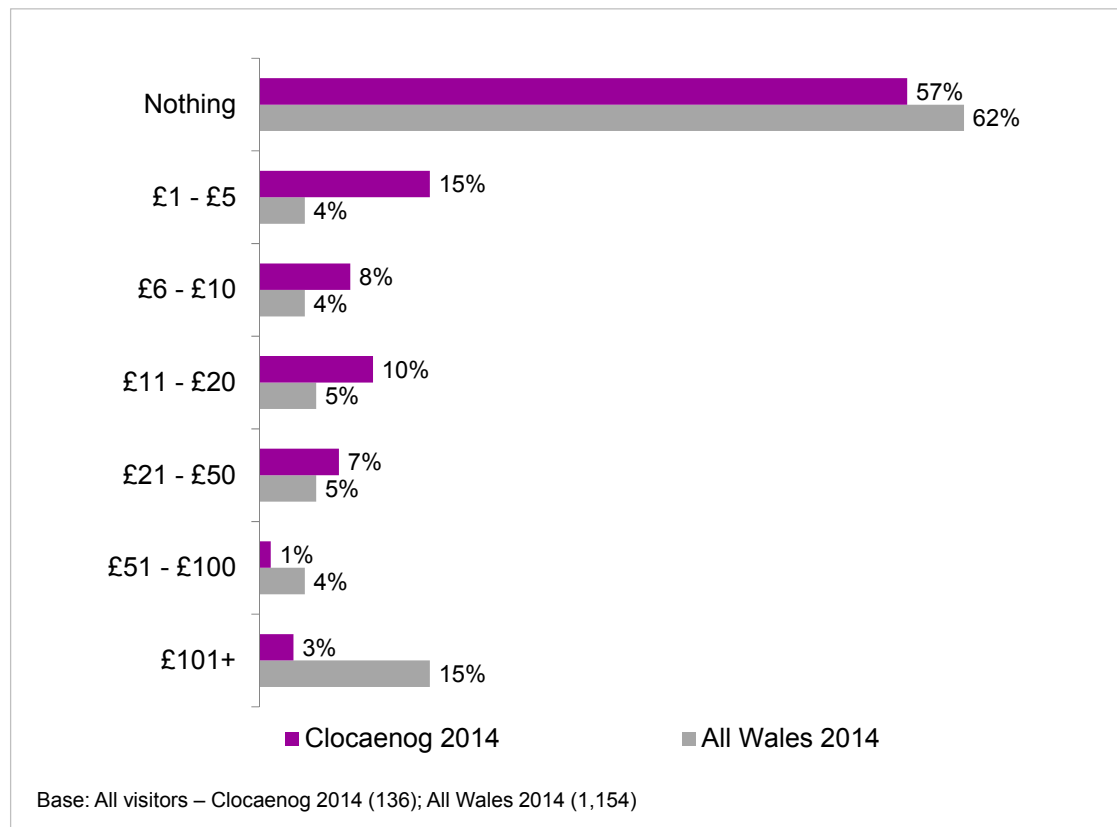
Visitors to Clocaenog were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Figure 8 show the figures calculated by combining the data across all types of spending.

Nearly six in ten visitors to Clocaenog claimed that they would not be spending anything in the area as a result of their trip (57%); slightly lower than the all Wales average (62%).

Around a third (33%) of visitors intended to spend £1 - £20 in the local area, with an average spend of £15.64. Only small proportion (11%) intended to spend more than £20: this was lower than the all Wales average proportion spending more than £20 (24%), and brings the average spend down to £15.64 (compared to £84.86 across all Wales).

Table 6 overleaf shows how this average is brought down by much lower amounts being spent in the area on food/drink and accommodation, and related back to the smaller than average percentage of visitors staying in the area.

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 Clocaenog, transport costs were mentioned by the highest proportion of visitors (32%), followed by food and drink (15%). Visitors were likely to spend £4.75 on transport and £4.39 on food/drink.

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

	% spending anything on items		Average spend on items £	
	Clocaenog %	All Wales %	Clocaenog £	All Wales £
Food and drink	15	27	£4.39	£26.37
Accommodation	4	15	£6.12	£50.24
Admissions to other attractions	1	5	£0.15	£4.97
Parking	1	10	£0.13	£1.56
Transport	32	20	£4.75	£9.83
Souvenirs / gifts	-	7	-	£2.68
Hiring equipment	-	1	-	£0.20
Anything else	1	3	£0.22	£2.37

Base: All visitors – Clocaenog 2014 (136); All Wales 2014 (1,154)

Due to a change in the way these questions were administered, 2011 comparisons were not possible.

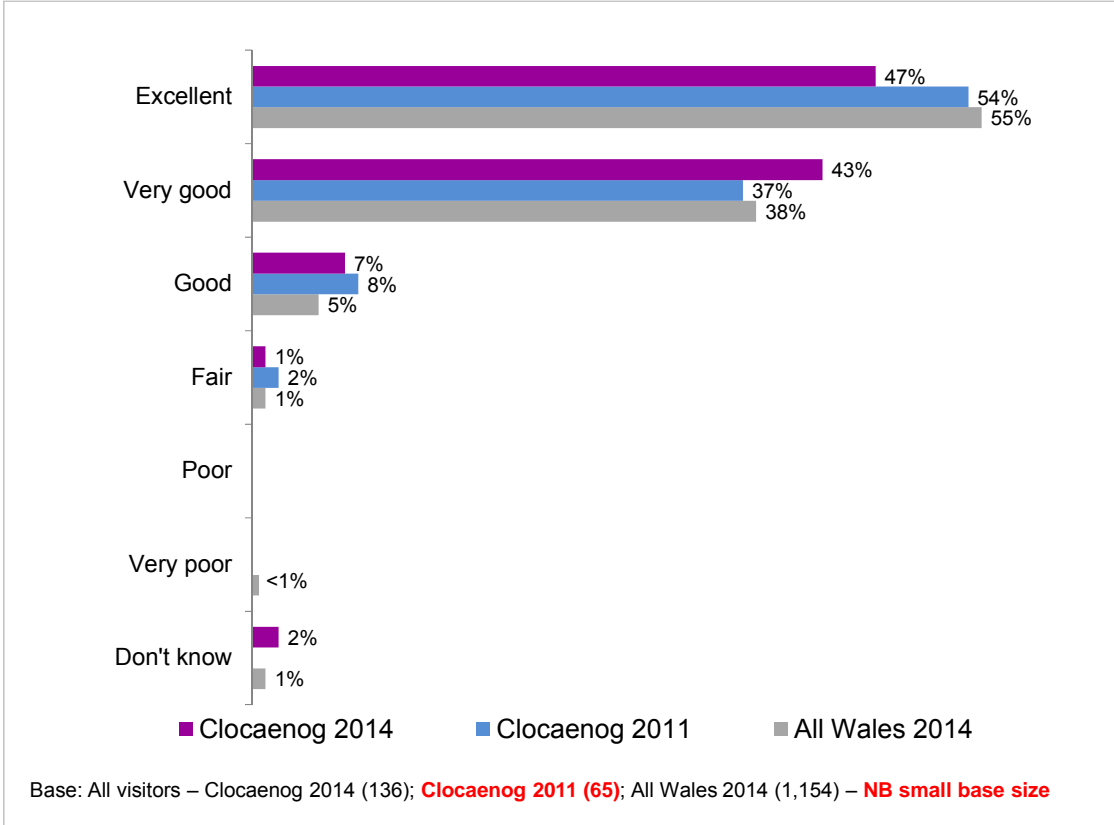
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

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

Nearly half (47%) rated the site as 'excellent', and while still impressive, this is slightly lower than the all Wales findings (55%) and the previous study conducted at Clocaenog in 2011 (54%). A further two fifths (43%) gave the site a rating of 'very good' and 7% rated it as 'good'.

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



Older visitors (65+) were less likely to rate the site as 'excellent' compared to the other visitors (35% vs. 55%). However, those with children were more likely to give an 'excellent' rating (54%) than the adults only (41%), although this finding should be treated with some caution due to the smaller base size for those visitors with children (41 individuals vs 95 individuals).

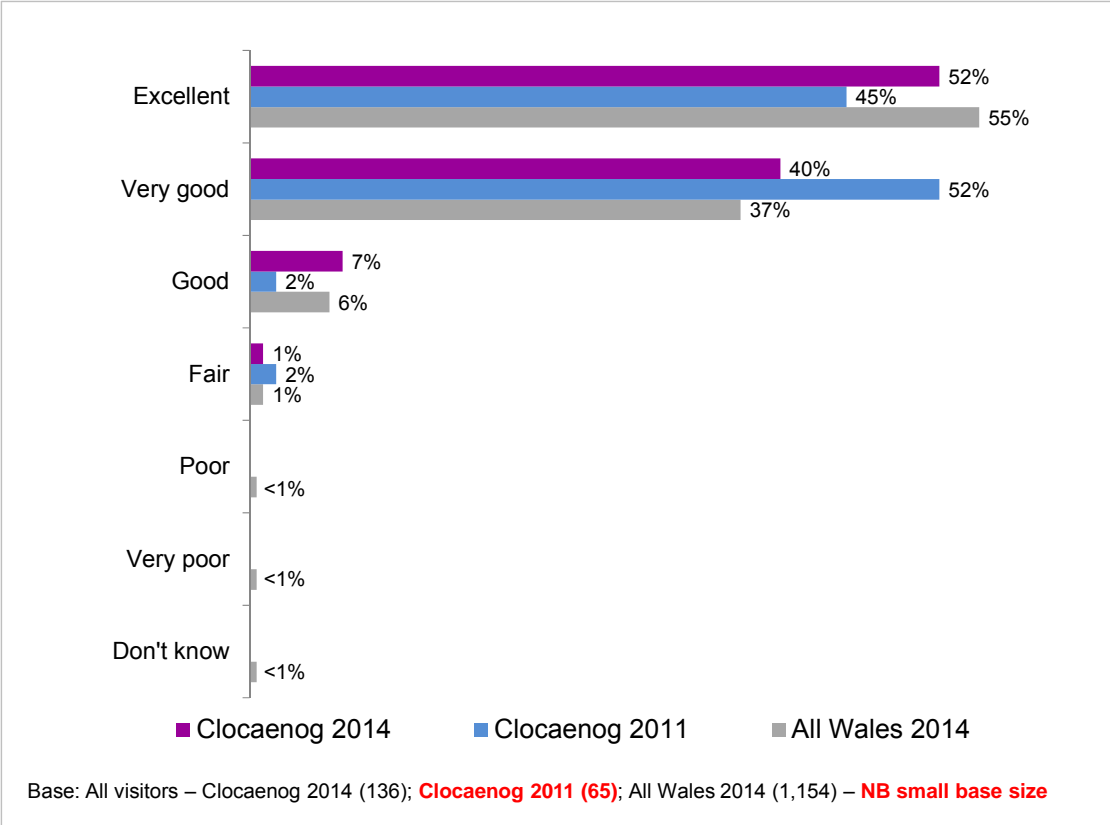
5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Clocaenog was were also very positive. This was also the case across all Wales sites, and views were slightly more positive in 2014 compared to 2011. None of the visitors gave a negative rating of the site in terms of it being safe and welcoming.

Over half the visitors gave this measure an 'excellent' rating (52%); this matches the figure obtained for all Wales sites (55%) and is higher than the 2011 figure of 45%.

Another two fifths (40%) gave a 'very good' rating for how safe and welcoming Clocaenog felt (compared to 52% in 2011 and 37% across all Wales sites).

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 Clocaenog and all Wales sites.

Nearly half of these positive visitors said that Clocaenog was peaceful, pleasant and (49%) and many also mentioned the scenery and beautiful (37%). Around a third (30%) said that the site was a safe environment generally, while 10% specifically mentioned that it was safe for children.

Some also mentioned the fresh air and open spaces (16%), and another 15% commented on the good provision of paths, trails and tracks – see Table 7 below for more details on the comments provided.

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

	Clocaenog 2014 %	All Wales 2014 %
Peaceful / pleasant / tranquil / relaxing / welcoming	48	32
The scenery / views / beautiful environment	37	41
Safe environment generally for all people	29	28
Fresh air / open space / plenty of space / freedom	16	22
Good provision of paths / trails and tracks	15	16
Live locally / convenient / easy to get to / close	14	8
Good, safe place for the kids to play / run around	10	15
Clean / tidy / well maintained / litter free	10	17
Well signposted / good maps / info boards	10	16
Good quality facilities / amenities	7	14
Well laid out / well organised / good set-up	6	14
Away from roads / no cars / cars drive slowly	3	2
Dog friendly	2	2
Good car parking	2	5
Not too crowded / busy	2	1
Other visitors are friendly	1	6
Been here before / familiar with it	1	<1
General positive comments	1	2
Some negative comments	3	3

Base: Visitors rating the site as excellent, very good or good – Clocaenog 2014 (134); All Wales 2014 (1,137)

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

- Lots to see and do
- Good on-site facilities
- Plenty of open space
- Well laid out / well planned
- Good value for money
- Good café / restaurant
- Good toilets
- Remote / away from traffic
- Something different / a change.

5.3 Recommending the site as a place to visit

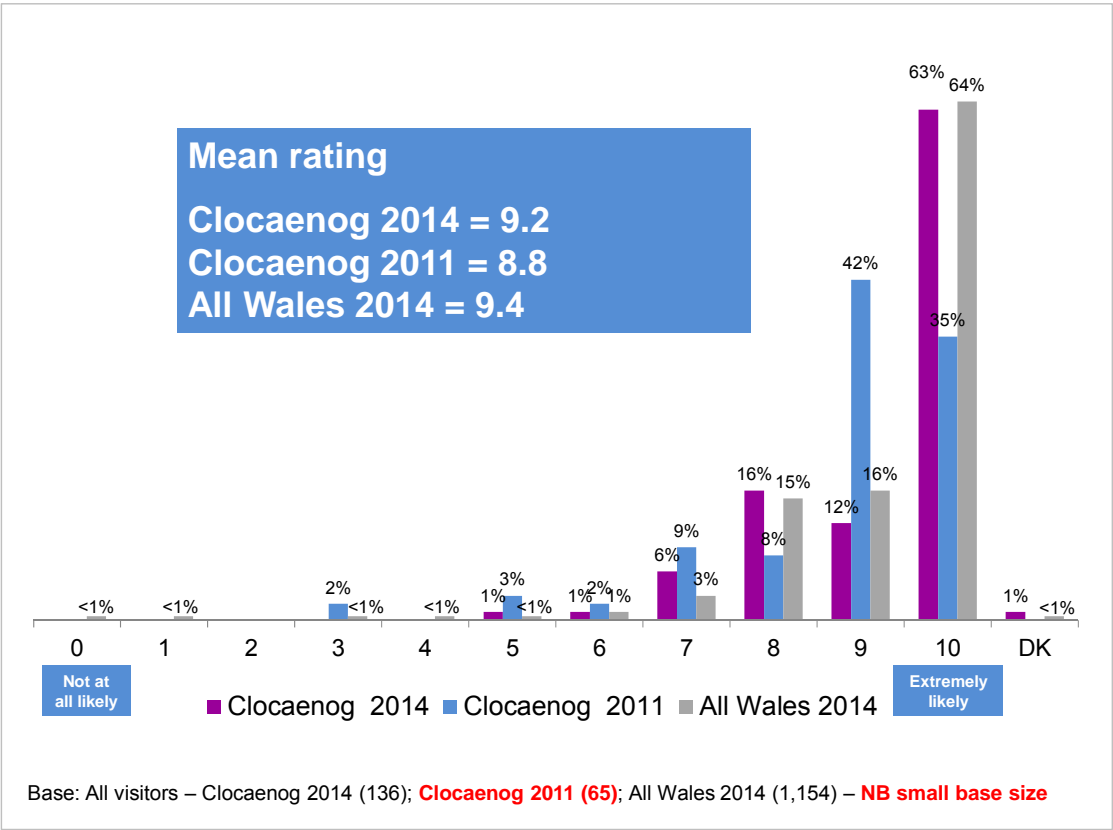
Visitors were asked whether they would be likely to recommend Clocaenog as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Clocaenog and all Wales sites generally were extremely positive: only 8% gave a rating of less than 8/10 for Clocaenog, and 5% gave less than 8/10 for the all Wales sites.

Two thirds (63%) gave a rating of 10, which was considerably higher than the previous Clocaenog study in 2011 (35%) but similar to the all Wales score (64%).

This was reflected in the mean scores, with Clocaenog 2014 standing at 9.2, compared with Clocaenog 2011 at 8.8 and all Wales at 9.4.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Clocaenog is 73, which is higher (by 3 points) than the score of 70 seen in 2011 and higher than the all Wales score of 72.

On a slightly different note: when asked if they were aware of the tree disease that was affecting larch trees in the area, 68% of visitors reported that they were, but had still decided to visit the site. Amongst the 43 individuals who were not aware of the disease affecting trees (32%), only 1 said that this might make a difference as to whether or not they visited Clocaenog again in future.

5.4 Favourite things about the site

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

Two favourite things about Clocaenog stood out. The most mentioned (by three quarters of visitors) was the tranquillity, peaceful and relaxing atmosphere (76%), followed by the scenery and beautiful views (47%). One in four (40%) mentioned walks, paths and trails as favourite things, with one in five mentioning that they liked the forests, trees and variety of plants (21%) – see Table 8 below for more details of the aspects of the site most liked by visitors.

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

Activities	Clocaenog 2014 %	Clocaenog 2011 %	All Wales 2014 %
Peace / tranquillity / relaxation / atmosphere	76	66	49
Scenery / views / beautiful / natural	47	45	47
Walks / paths / trails	40	29	34
Like forests / trees / variety of trees and plants	21	11	10
Wildlife / bird watching	18	18	18
Fresh air / being outside	18	9	17
Close to home / convenient location	10	14	12
Exercise / keeping fit	9	6	7
Safe environment	9	11	10
Cycle trails / freedom / opportunity to cycle	7	9	16
Ideal for dogs / dog friendly / safe for dogs	7	-	4
Rivers / creeks / waterways	6	-	3
Activities that are good for the children	5	6	9
Opportunity to spend time with family / friends	5	3	4
Clean / well looked after	4	8	9
Not crowded / not too many people	4	-	3
Been before / wanted to come again	3	-	6
Plenty / cheap / good parking	3	5	4
Good accessibility	3	-	4

Base: All visitors – Clocaenog 2014 (136); **Clocaenog 2011 (65)**; All Wales 2014 (1,154) – **NB small base size**

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

- The adults visiting without children were more likely to mention the peace, tranquillity and relaxation (81%) than those visiting with children (66%) – NB small base size for staying visitors (24)
- The peace and tranquillity of the site was mentioned by a higher proportion of men (84%) than women (68%)
- Visitors categorised as C2DE socio-economic groups were more likely to like the fresh air / being outside (35%) than those from ABC1 groups (10%)
- Staying visitors were slightly more likely to mention the scenery and views (63%) than the day trip visitors (44%) – NB small base size for staying visitors (24).

5.5 Suggested improvements to the site

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

Turning firstly to what would enhance their enjoyment of the site. Nearly half of visitors to Clocaenog could not think of anything that would add to their enjoyment and only made positive comments (49%). This was similar to the all Wales average of 46%.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. The most frequently mentioned improvement related to the toilet facilities: 11% of visitors wanted to see these upgraded, or more toilets / showers / changing facilities around the site. A further one in ten would like to see more bins / recycling bins or improved signage (10% for each).

More dog poo bins would enhance the enjoyment at Clocaenog for 8% of visitors, while a further 5% would like to see more maintenance of paths / cycle trails surfaces – see Table 9 below.

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

	Clocaenog 2014 %	All Wales 2014 %
Nothing / general positive comments	49	46
Improve toilets / more toilets / shower facilities / changing area	11	6
Improve signage / more maps / better maps	10	6
More bins / litter bins / recycling bins / less litter	10	4
More dog poo bins / remove dog poo	8	7
Improve maintenance of paths / cycle trails / better surfacing	5	3
More activities for children / more play areas	4	4
More seating	4	3
Longer / more challenging trails, paths and cycle routes	3	2
More trails / paths / cycle tracks	2	4
Provide café / catering / refreshments	2	2

Base: All visitors – Clocaenog 2014 (136); All Wales 2014 (1,154)

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

- Improve café / catering
- More picnic areas / BBQ / picnic tables and benches
- More wildlife / birds
- Plant more trees
- Better access / make more accessible (including disabled access).

When asked if there was anything that interfered with their enjoyment of the site, over three quarters reported that nothing had interfered with their enjoyment (76%). This was higher than the all Wales average of 70%.

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

Poor signage and maps were mentioned by 7%, while poor weather, issues with the toilet and the need for more bins / recycling bins were noted by 4% each.

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

	Clocaenog 2014 %	All Wales 2014 %
Nothing	76	70
Signs unclear / need better signs / more maps	7	3
Wet / raining / windy (poor weather)	4	8
Need more letter bins / recycling bins / too much litter	4	2
Issues with toilets (not enough, closed, dirty etc.)	4	2

Base: All visitors – Clocaenog 2014 (136); All Wales 2014 (1,154)

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

- Dog mess on paths
- Poor maintenance of the site (paths, fences, waterways)
- Need more dog poo bins.

6. Site facilities

6.1 Importance of site facilities

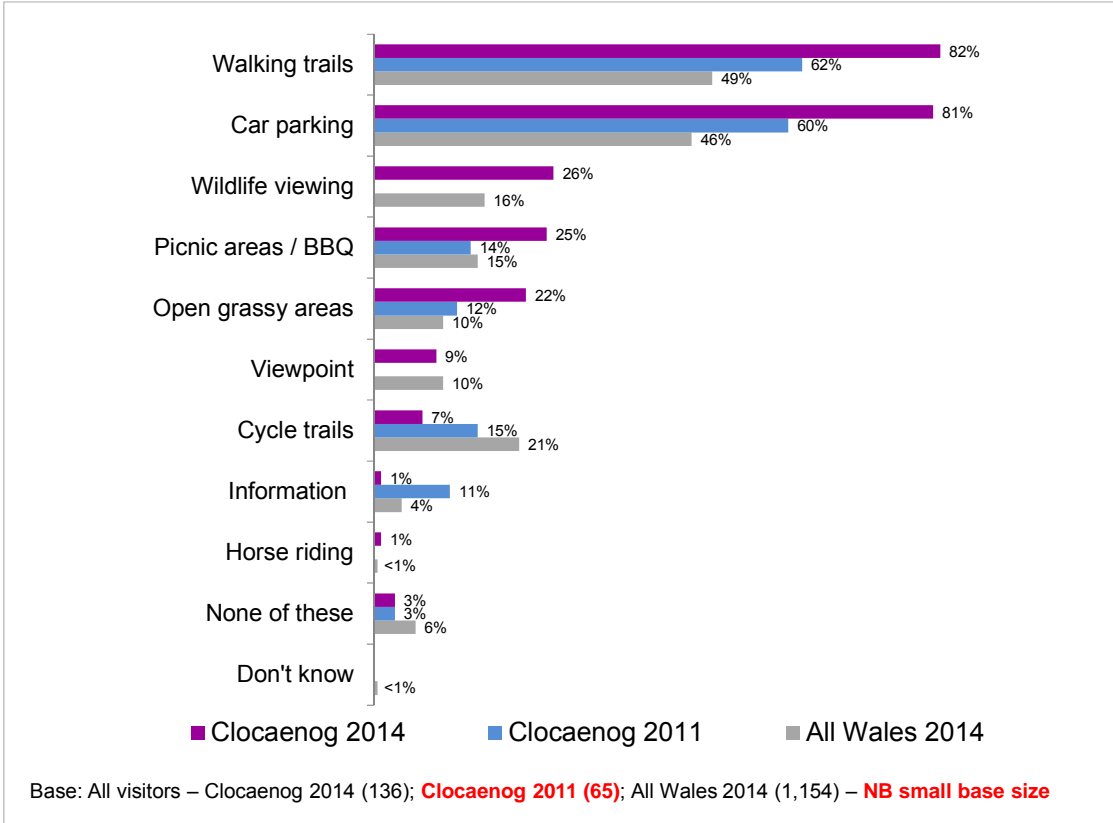
Visitors were presented with a list of facilities available at Clocaenog and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

Walking trails was mentioned by the highest proportion of visitors to Clocaenog (82%): this was a higher proportion than those who mentioned walking trails in previous research (62%) and it is much higher than the all Wales average (46%). Car parking facilities were also mentioned by an equally high proportion of visitors (81%): again much higher than the 2011 survey (60%), and the all Wales average (46%).

Being able to view wildlife was important to a smaller proportion of visitors (26%); but this was not mentioned in the previous research. Other aspects that were important to the decision to visit in 2014, but were not mentioned in 2011 included the Viewpoint (9%) and horse riding (1%).

The cycle trails were of less importance to visitors in 2014 compared to 2011 (7% vs 15%) and all sites across Wales (21%).

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



Certain other factors (apart from site facilities) were important to almost two fifths of visitors (38%) when choosing to come to the site. Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

Other factors included being close and convenient to their home (7%), being dog friendly and being on route (5% each) The peace and tranquillity of the area, good weather and beautiful scenery were all mentioned by 4% of visitors.

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

	Clocaenog 2014 %	All Wales 2014 %
Nothing	62	60
Close to home / local / convenient	7	7
Dog friendly / dogs can come off leads / dog facilities	5	5
Was just passing / én route	5	5
Relaxing / peaceful / tranquil / quiet	4	3
Good weather / sunny / warm	4	4
Wanted to go walking / cycling	4	3
Beautiful scenery / views / natural beauty	4	2
Meeting / visiting with family and friends	2	3
Good facilities	2	3

Base: All visitors – Clocaenog 2014 (136); All Wales 2014 (1,154)

Other factors mentioned by 1% of visitors included:

- Using the river / pond / lake
- Been before / good memories
- Easily accessible
- Site events
- Outdoors / fresh air
- Good for the children to run around and play.

6.2 Facilities used

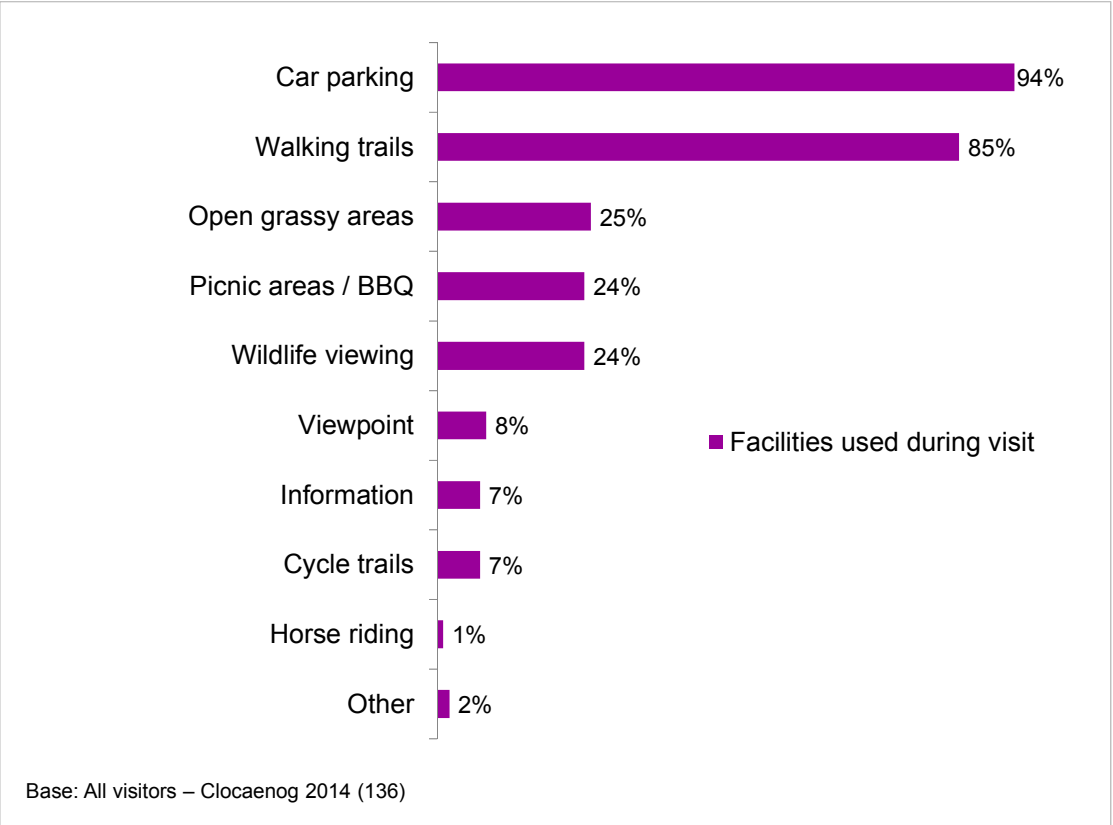
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The facilities used reflected, to a large extent, visitors' views of their importance. Parking was used by the highest proportion of visitors (94%), followed by walking trails (85%).

The open grassy areas were used by a quarter of visitors to Clocaenog (25%), while similar proportions used the picnic / BBQ areas or the wildlife viewing amenities (24% each).

Facilities used by the smallest proportions of visitors included cycle trails, information (both 7%) and horse riding (1%).

Figure 13: Q15a. Facilities used at Clocaenog 2014



On a slightly different note: just over half of visitors had a dog with them (53%), and the vast majority of these (89%) 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 Clocaenog have been detailed in Figure 14 below. Ratings of most of the facilities were extremely positive, with almost none of the visitors interviewed giving any of these facilities a poor rating, and the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

The facility that received the highest score was the car park. Over four in ten rated this as ‘excellent’ (44%) and a further third rated it as ‘very good’ (34%). The wildlife viewing facility and the walking trails also received very high scores: 42% rated the wildlife viewing as ‘excellent’ whilst a similar portion said the same about the walking trails (41%).

Around a third rated the open grassy areas and the picnic / BBQ facilities as ‘excellent’ (38% and 27% respectively) whilst most of the remaining users rated them as ‘very good’ or ‘good’ (45% and 66% respectively).

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

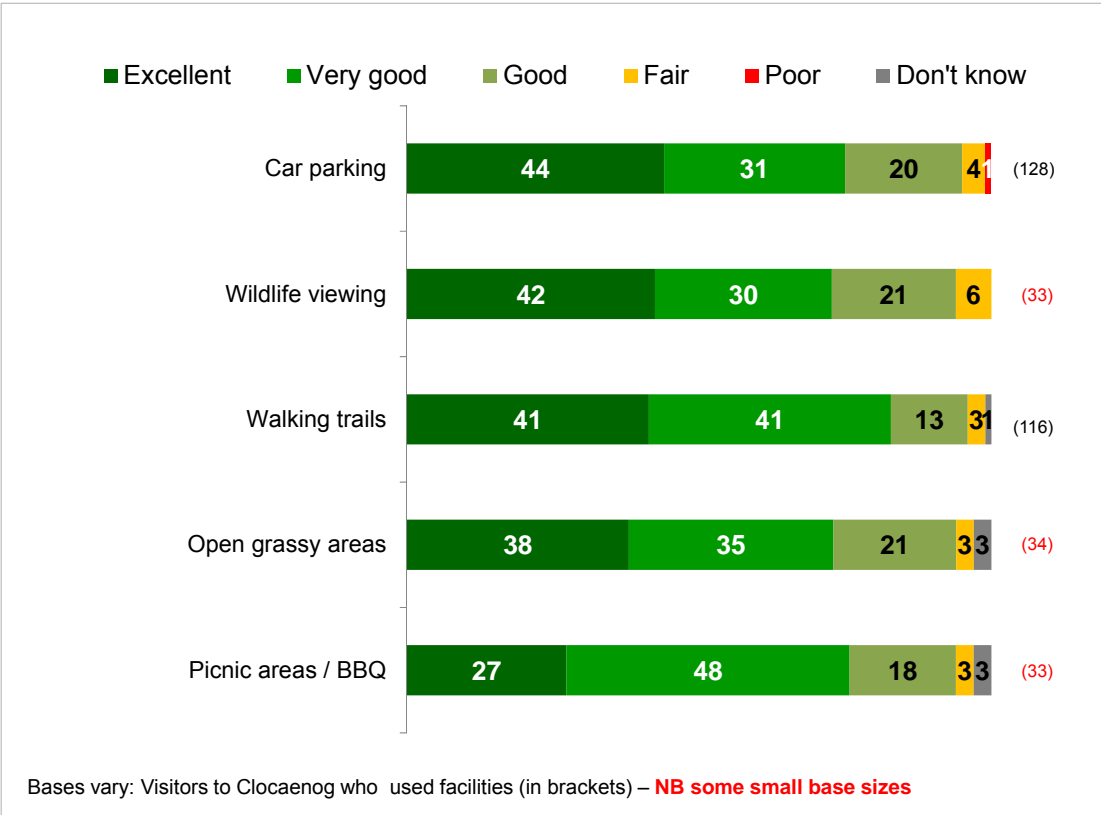


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2014 compared to 2011, where they were mentioned in the previous survey.

The proportion of visitors who gave an 'excellent' rating increased for both the walking trails (13 per cent points) and the open grassy areas (12 per cent points).

However, the proportion rating the car parking facilities and the picnic areas / BBQ facilities as excellent decreased in 2014 (8 and 3 per cent point decreases).

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

Facilities	Clocaenog 2014 %	Clocaenog 2011 %	% point change
Car parking	44	52	-8
Walking trails	41	28	+13
Open grassy areas	38	26	+12
Picnic areas / BBQ	27	30	-3

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 Clocaenog 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 (60%): as would be expected, this was considerably higher amongst repeat visitors (77%) compared to first-time visitors (6%). A lower proportion of visitors said they had always known about the site in 2011 (54%).

Less than one in five visitors heard about Clocaenog through word of mouth (17%), in line with both the 2011 and all Wales figures (18% for 2011 and 20% for all Wales). First-time visitors were more likely to have found out about the site through word of mouth (32%) than repeat visitors (12%).

Other sources of awareness included just passing / en route (13%), road signs and because they lived locally (both 7%). Google (3%) and the Forestry Commission website (3%) were not mentioned in 2011.

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

	Clocaenog 2014 %	Clocaenog 2011 %	All Wales 2014 %
Always known about it / been here before	60	54	51
Word of mouth	17	18	20
Just passing / en route	13	14	13
Road signs	7	5	5
Live locally	7	-	2
Map	3	3	2
Google / other search engine	3	-	5
Forestry Commission website	2	-	1

Base: All visitors – Clocaenog 2014 (136); **Clocaenog 2011 (65)**; All Wales 2014 (1,154) – **NB small base size**

There were a few other comments mentioned by one or two visitors:

- Other websites
- Book / guide book

8. Visiting other areas and attractions

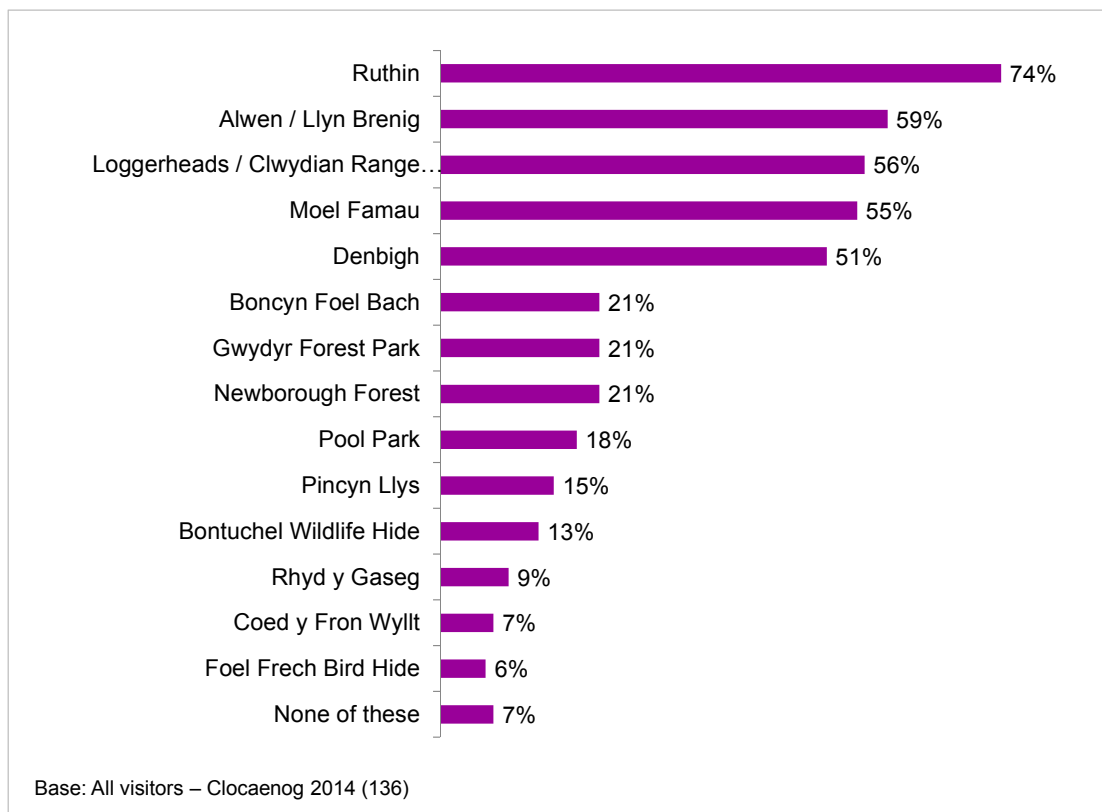
Visitors to Clocaenog were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: most visitors (93%) had visited at least one.

Ruthin was visited by the highest proportion of Clocaenog visitors (74%), followed by Alwen / Llyn Brenig (59%), Loggerheads / Clwydian Range Visitor Centre (56%) and Moel Famau (55%) and Denbigh (51%). Day-trip visitors were much more likely to have visited these five locations compared to staying visitors.

The attractions / areas mentioned by the smallest proportions of visitors were Rhyd y Gaseg (9%), Coed y Fron Wylt (7%) and Foel Frech Bird Hide (6%) – see Figure 15 below.


Most of the above attractions were also visited by those in surveyed in Clocaenog in 2011. Ruthin town was mentioned by the highest proportion of Clocaenog visitors again (77%), followed by Llyn Brenig (71%), Coed Moel Famau (55%) and Alwen (46%).

Figure 15: Q19. Other areas / attractions visited 2014



Appendix I

Questionnaire

 2 Museum Place, Cardiff, CF10 3BG	<u>B01326-2</u> <u>NRW / FCE</u> <u>Quality of Visitor Experience – Year 2</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>Always known about it / been here before Word of mouth Newspaper Leaflet Tourist Information Centre Road signs Just passing / en route Map Smartphone app Facebook Twitter Forestry Commission website Natural Resources Wales website Google / other search engine Other website (please specify) _____</p>	<p>(55-58m)</p> <p>1 2 3 4 5 6 7 8 9 A B C D E X</p>
<p>Other (please specify) _____</p> <p>Don't know / can't remember</p>	<p>(59-62m)</p> <p>X M</p>
<p>Q8 What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED</p> <p>Peace / tranquillity / relaxation Scenery / views / beautiful Walks / paths / trails Cycle trails / freedom / opportunity to cycle Wildlife / bird watching Fresh air / being outside Exercise / keeping fit Activities that are good for the children Close to home / convenient Opportunity to spend time with family / friends Safe environment Lots to see and / or do Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after The weather Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money</p>	<p>(63-66m)</p> <p>1 2 3 4 5 6 7 8 9 A B C D E F G H I J K</p>
<p>Other (please specify)</p> <p>-----</p> <p>Nothing Don't know</p>	<p>(67-70m)</p> <p>L M</p>

ASK ALL

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

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 } **Q12**
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

ASK ALL

SHOWCARD G3

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

PROBE Any others?

CODE ALL MENTIONED

		(105-108m)
A	Car parking	7
B	Cycling trails	A
C	Horse riding	K
D	Information available / interpretation	M
		(109-112m)
E	Open grassy areas	2
F	Picnic areas / BBQ	5
G	Viewpoint	D
H	Walking trails	F
I	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 G3 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	Car parking	7	1	2	3	4	5	6	7	(146)
B	Cycling trails	A	1	2	3	4	5	6	7	(149)
C	Horse riding	K	1	2	3	4	5	6	7	(159)
D	Information available / interpretation	M	1	2	3	4	5	6	7	(160)
		(129-132m)								
E	Open grassy areas	2	1	2	3	4	5	6	7	(164)
F	Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
G	Viewpoint	D	1	2	3	4	5	6	7	(175)
H	Walking trails	F	1	2	3	4	5	6	7	(177)
I	Wildlife viewing	G	1	2	3	4	5	6	7	(178)
OTHERS (WRITE IN)		(133-136m)								
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()

None of these
 Don't know

M
 N

ASK ALL

SHOWCARD H AGAIN

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

(235)

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

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

Don't know / not sure

7

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

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

(236)

SHOWCARD I

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

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

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

SHOWCARD J

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

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

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

ASK ALL

FOU: (335-369 FOR Q19)

SHOWCARD K3 (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

- Alwen / Llyn Brenig
- Boncyn Foel Bach
- Bontuchel Wildlife Hide
- Coed y Fron Wyllt
- Denbigh
- Foel Frech Bird Hide
- Gwydyr Forest Park
- Loggerheads / Clwydian Range Visitor Centre
- Moel Famau
- Newborough Forest
- Pincyn Llys
- Pool Park
- Rhyd y Gaseg
- Ruthin

- None of these
- Don't know

(345-348m)

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

- F
- G

FOU: (370-410 FOR Q20)

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

(378)

Yes

1 **Q20ci**

No

2

Don't know

3 **Q20b**

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

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

(379)

Yes

1

No

2

Don't know

3

Q20ci INTERVIEWER – CODE IF RESPONDENT HAS A DOG WITH THEM

(380)

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?

(381)

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	Yes 1 No 2	Supervisor signature

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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