

beaufortresearch

30 years of intelligent research

Research Report

Quality of the Visitor
Experience 2014

Coed y Brenin



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: B01326-2

Date: March 2015

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 2015



Contents	Page
1. Executive summary	1
1.1 Quality of the Visitor Experience Research.....	1
1.2 Coed y Brenin	1
1.3 Perceptions of the site	1
1.4 Strengths of the site	2
1.5 Areas for improvement.....	2
1.6 Visitor profile	2
2. Introduction	4
2.1 Background.....	4
2.2 Research programme	5
2.3 Report	6
2.4 Data tables.....	6
3. Visitor profile information	7
3.1 Visitor profile	7
3.2 Group profile	9
3.2.1 Size of group.....	9
3.2.2 Composition of group.....	10
4. Profile of visit	11
4.1 Type of visit.....	11
4.2 Visitor origin	12
4.3 Frequency of visits	14
4.3.1 First-time visitors.....	14
4.3.2 Repeat visitors	14
4.4 Length of visit.....	15
4.5 Activities undertaken.....	16
4.6 Length of time spent on activities.....	18
4.7 Money spent on site and in area as a result of the visit	19

5.	Perceptions of the site	23
5.1	Overall rating of the site as a place to visit.....	23
5.2	Overall rating of the site as safe and welcoming.....	24
5.3	Recommending the site as a place to visit.....	26
5.4	Favourite things about the site	28
5.5	Suggested improvements to the site.....	29
6.	Site facilities	32
6.1	Importance of site facilities.....	31
6.2	Facilities used	35
6.3	Rating of site facilities	36
7.	Sources of information used to plan visit	38
8.	Visiting other areas and attractions	39

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 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 205 visitor interviews conducted at Coed y Brenin in 2014. Throughout the report, comparisons have been made to the previous research conducted in 2010, and the all Wales average (aggregated data from all 7 sites surveyed in 2014).

1.2 Coed y Brenin

Set within Snowdonia National Park, Coed y Brenin Forest Park is one of Natural Resources Wales' premier recreation sites, and covers an area of around 9,000 acres around the valleys of the rivers Mawddach, Eden, Gain and Wen.

Coed y Brenin has developed into a major UK mountain biking centre, and has a wide variety of activities available to visitors, from challenging orienteering routes and Geo Caching to waymarked trails for walking, as well as a café, picnic sites and a children's play area.

1.3 Perceptions of the site

Perceptions of Coed y Brenin as a place to visit are very positive. This was also true across all Wales sites. Almost two thirds (65%) rated the site as excellent, which is somewhat higher than the all Wales average (55%) and also higher than the 2010 survey findings (51%). Overall, 99% gave a positive rating to Coed y Brenin.

Similarly, ratings of how safe and welcoming Coed y Brenin was were also very positive. Virtually all visitors (99%) again rated Coed y Brenin as at least 'good' and no-one gave a negative rating in terms of how safe and welcoming it felt. Three in five (61%) rated this aspect as excellent: more than in 2010 (50%) and across Wales on average in 2014 (55%).

When asked whether they would be likely to recommend the site as a place to visit to a friend or relative (using a score of 0-10), scores for Coed y Brenin (and all Wales sites generally) were extremely positive. Coed y Brenin scored an impressive 9.6 out of 10 – an improvement on 2010 when it scored a still extremely positive 9.1. On average, all sites in Wales were scored as 9.4. Three quarters of Coed y Brenin visitors (74%) gave a rating of 10 out of 10, which was higher than both the previous study in 2010 (63%) and the all Wales score (64%).

1.4 Strengths of the site

Three favourite things about Coed y Brenin stood out. As a renowned mountain biking site, it was unsurprising that the most mentioned aspect was the cycle trails or the freedom and opportunity to cycle, which over half the sample visitors said was a favourite aspect of the site (53%). The second most popular element was the good onsite facilities (41%), which was followed by the scenery and views (34%).

1.5 Areas for improvement

Nearly half of visitors to Coed y Brenin could not think of anything that would add to their enjoyment and only made positive comments (46%). The most frequently mentioned improvements related to requests for more trails, paths and cycle tracks (14%), better parking (7%) and improved signage and maps (7%).

1.6 Visitor profile

The majority of Coed y Brenin visitors (66%) were repeat visitors which is largely similar to across Wales in general (71%).

Most visitors to Coed y Brenin were visiting the site as part of a holiday or overnight stay in the area; at 67% this is significantly higher than across all Welsh sites on average (34%) and also represents a large increase on the 2010 survey (46%).

Almost three quarters (72%) of visitors to Coed y Brenin came from outside of Wales; most were visiting from England (68%). Of those who were visiting from Wales, most were from North Wales (21%).

Group sizes were slightly larger at Coed y Brenin (averaging 3.8 people), compared to the all Wales average (3.3 people).

Visitors to Coed y Brenin spend on average 3 hours and 35 minutes at the site, whereas in 2010 the average time spent was around an hour less, at 2 hours and 37 minutes. Across Wales on average, visitors spend 2 hours and 7 minutes on their visit.

The demographic profile of visitors to Coed y Brenin was somewhat different to that of the visitors to all the Wales sites, with Coed y Brenin visitors being more likely to be male (65% of visitors were men, compared with 53% across all Wales sites), younger (62% were under 45 vs. 42% all Wales), working full time (72% vs. 56%) and in social grade AB (55% vs. 38%).

Around four in ten (42%) of Coed y Brenin visitors had children in the household, which was a little higher than the all Wales figure (34%).

Only 16% of visitors to Coed y Brenin spoke Welsh (8% fluently and 8% non-fluently) which is a little less than across all Wales visitors where 22% are Welsh speakers (11% fluent, 11% non-fluent).

As with the all Wales average, the overwhelming majority of visitors to Coed y Brenin were White British / Welsh / Irish (93%), with only a small number of visitors describing their ethnicity as 'White other nationality' (6%) or 'Black / Asian / Mixed' (1%).

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 Coed y Brenin, interviewing took place between 29th March and 28th September, and a total of 205 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Coed y Brenin 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 2010 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 Coed y Brenin. 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 Coed y Brenin was somewhat different to that of the visitors to all the Wales sites, with Coed y Brenin visitors being more likely to be male (65% of visitors were men, compared with 53% across all Wales sites), younger (62% were under 45 vs. 42% all Wales), working full time (72% vs 56%) and in social grade AB (55% vs. 38%).

Around four in ten (42%) of Coed y Brenin visitors had children in the household, which was a little higher than the all Wales figure (34%).

As with the all Wales average, the overwhelming majority of visitors to Coed y Brenin were White British / Welsh / Irish (93%), with only a small number of visitors describing their ethnicity as 'White other nationality' (6%) or 'Black / Asian / Mixed' (1%).

Only 16% of visitors to Coed y Brenin spoke Welsh (8% fluently and 8% non-fluently) which is a little less than across all Wales visitors where 22% are Welsh speakers (11% fluent, 11% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2014

		Coed y Brenin %	All Wales %
Gender	Male	65	53
	Female	35	47
Age	16 - 24	6	3
	25 - 34	25	16
	35 – 44	31	23
	45 – 54	25	23
	55 – 64	10	17
	65+	2	17
	Refused	-	<1
Social class	AB	55	38
	C1	28	34
	C2	11	15
	DE	5	12
	Refused	1	1
Working status	Full-time employee (30+ hours per week)	72	56
	Part-time employee (<30 hours per week)	8	10
	Self-employed	11	7
	Full-time education	3	1
	Unemployed	1	1
	Permanently sick / disabled	-	2
	Retired	4	19
	Looking after home	1	2
	Other	-	<1
	Refused	-	1
Limiting illness	Yes – limited a lot	2	4
	Yes – limited a little	<1	5
	No	97	90
	Refused	1	1
Children in household	Yes	43	34
	No	57	66
	Refused		<1
Ethnicity	White – British / Welsh / Irish	93	96
	White – Other	6	3
	Black / Asian / Mixed	1	1
	Refused	-	<1
Welsh speaker	Yes	16	22
	No	84	78

Base: All visitors – Coed y Brenin (205); All Wales (1,154)

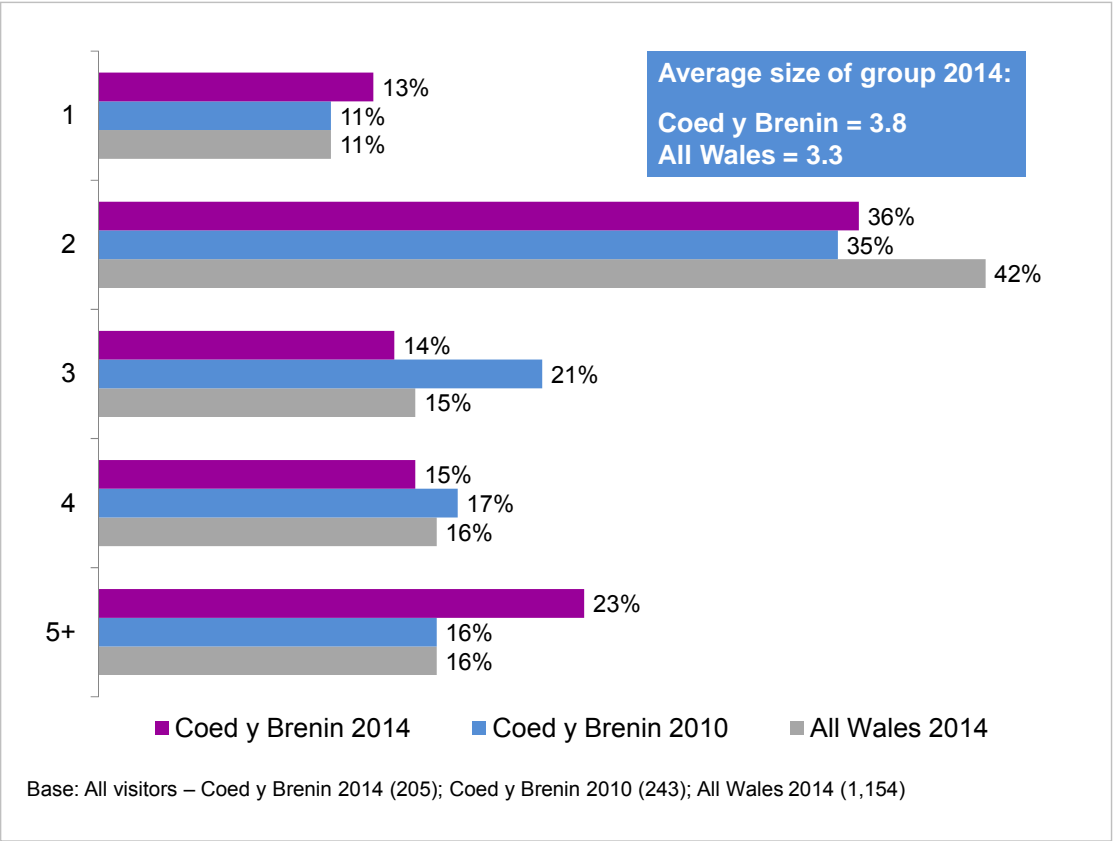
3.2 Group profile

3.2.1 Size of group

Group sizes were slightly larger at Coed y Brenin (averaging 3.8 people), compared to the all Wales average (3.3 people), see Figure 1 below.

As in 2014, the most common group size was two, with over a third of Coed y Brenin visitors (36%) visiting in groups of two (virtually unchanged since 2010). A slight change since the last survey was in the number of visitors visiting in groups of 5 or more, up from 16% in 2010 to 23% in 2014.

Figure 1: Q1. Total size of the group



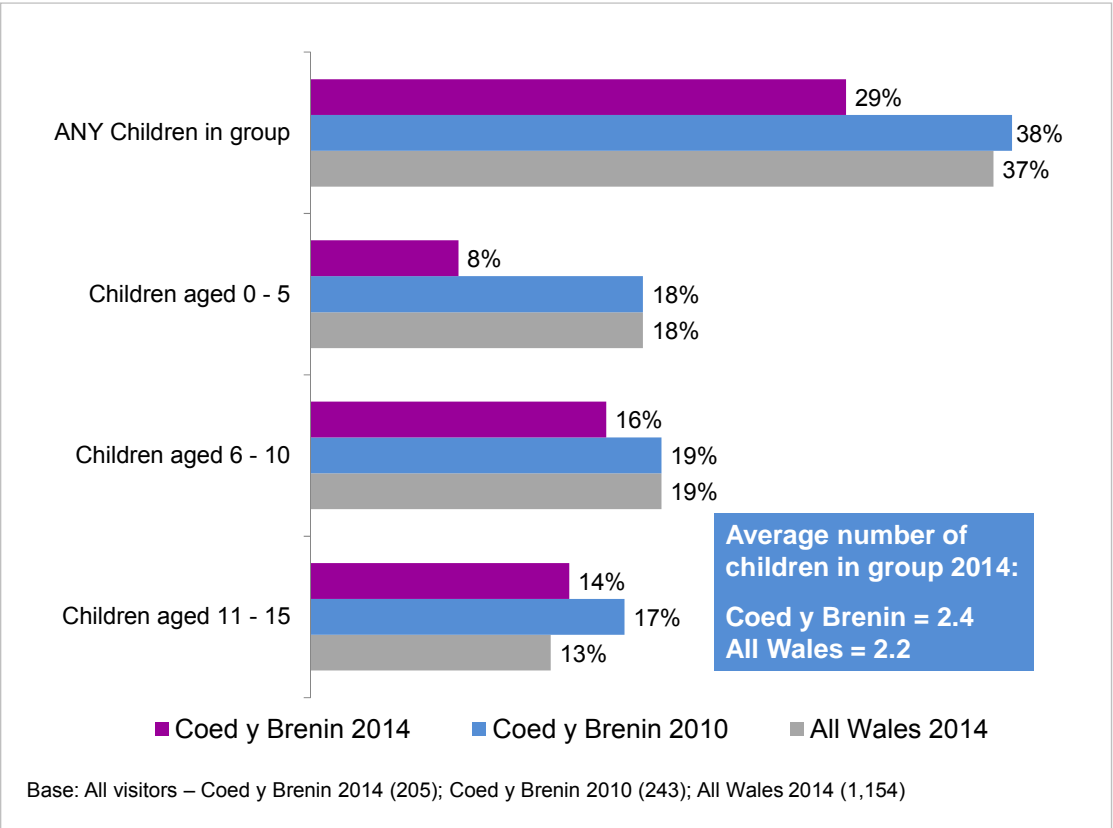
3.2.2 Composition of group

Over a quarter of the groups who visited Coed y Brenin contained children (29%). This was lower than the all Wales figure (37%) and similarly lower than the comparative Coed y Brenin study conducted in 2010 (38%).

The average number of children per group visiting Coed y Brenin in 2014 was consistent with the all Wales average (mean of 2.4 children per group at Coed y Brenin compared with 2.2 all Wales).

Children visiting Coed y Brenin were more likely to be older than average, with more 6-10s and 11-15s visiting than 0-5 year olds.

Figure 2: Q1. Composition of group



4. Profile of visit

4.1 Type of visit

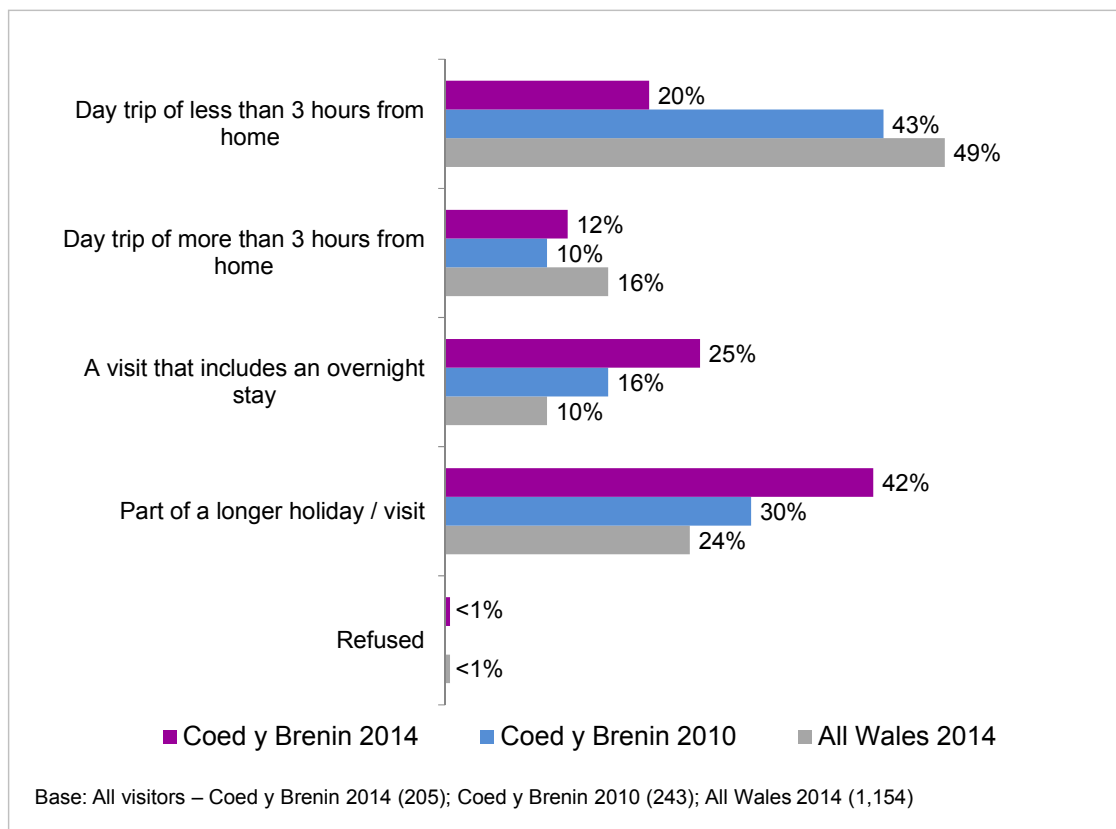
Most visitors to Coed y Brenin were staying visitors (67%) rather than 'day tripper's (33%). Typically across all Welsh sites the opposite is true, with on average, 34% of visitors staying in the area and 65% being on a day trip.

This represents an increase in staying visitors since 2010, when less than half were staying in the area (46%).

Most 2014 staying visitors said they were on a longer holiday or visit to the area (42% of all visitors), rather than on just an overnight stay (25%).

Coed y Brenin had less local day visitors than average, with just a fifth (20%) visiting as part of a day trip of less than 3 hours from home compared with almost half (49%) across Wales on average. The proportion visiting as part of a longer day trip away from home (12%) was similar to the previous research (16% and 10% respectively).

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.

Almost three quarters (72%) of visitors to Coed y Brenin came from outside of Wales, mostly visiting from England (68%). Of those who were visiting from Wales, most were from North Wales (21% of all visitors).

Only small proportions were visiting from abroad or from the 'rest of the UK' (3% and 1% respectively). Table 3 below and Figure 4 overleaf provide more details.

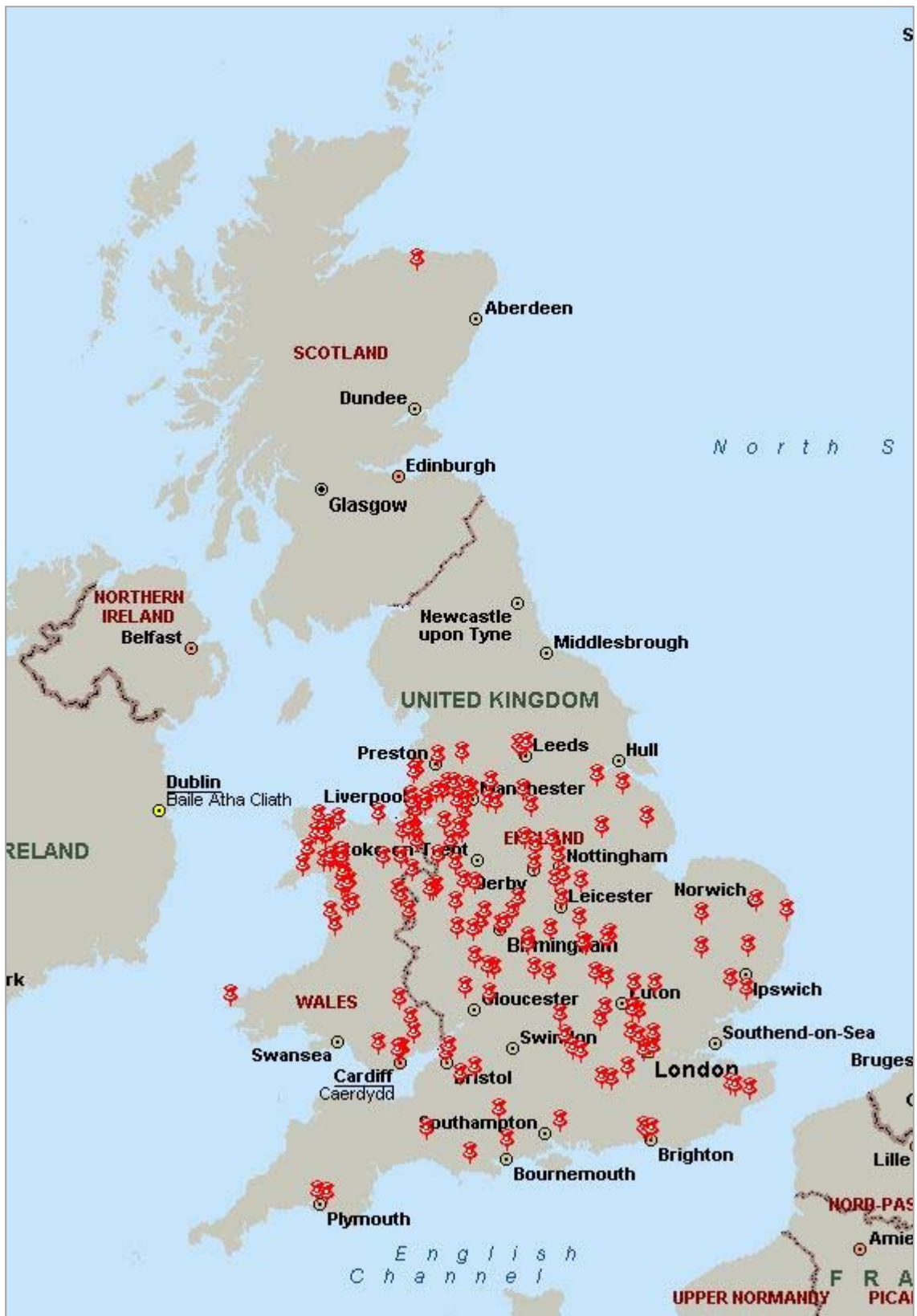
Table 3: Q28b. Visitor origin 2014

		Coed y Brenin %	All Wales %
Home region	North Wales	21	20
	Mid / West Wales	3	21
	South West Wales	<1	5
	Valleys	-	10
	South East Wales	3	5
	Outside of Wales	72	40
Home nation	Wales	28	60
	England	68	38
	Rest of UK	1	<1
	Abroad	3	2
	Refused	-	<1

Base: All visitors – Coed y Brenin (205); All Wales (1,154)

The vast majority (92%) had travelled to Coed y Brenin by car, whilst 4% had cycled there and 1% had either come by bus or mini bus.

Figure 4: Map of visitor origin for Coed y Brenin



4.3 Frequency of visits

4.3.1 First-time visitors

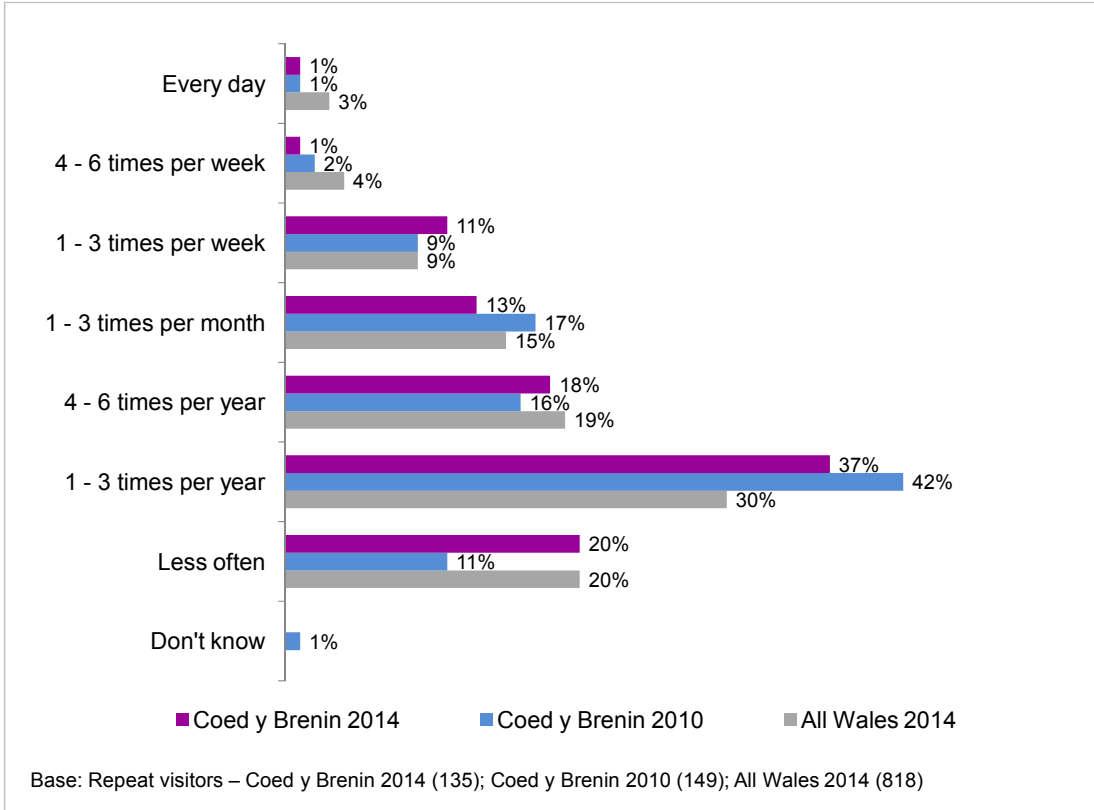
In 2014 a third (34%) of visitors to Coed y Brenin were first-time visitors, meaning that two-thirds (66%) were repeat visitors. This is largely similar to across Wales in general where 29% had never visited their respective forest site before, and 71% were repeat visitors.

4.3.2 Repeat visitors

Focussing on repeat visitors (66% of the sample), most visitors were infrequent, visiting Coed y Brenin between 4-6 times a year or less often (75%). This is largely in line with previous findings and the all Wales average.

Around a quarter of repeat visitors (26%) came monthly or more often to Coed y Brenin, split into 13% visiting every week, and 13% visiting monthly or fortnightly.

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

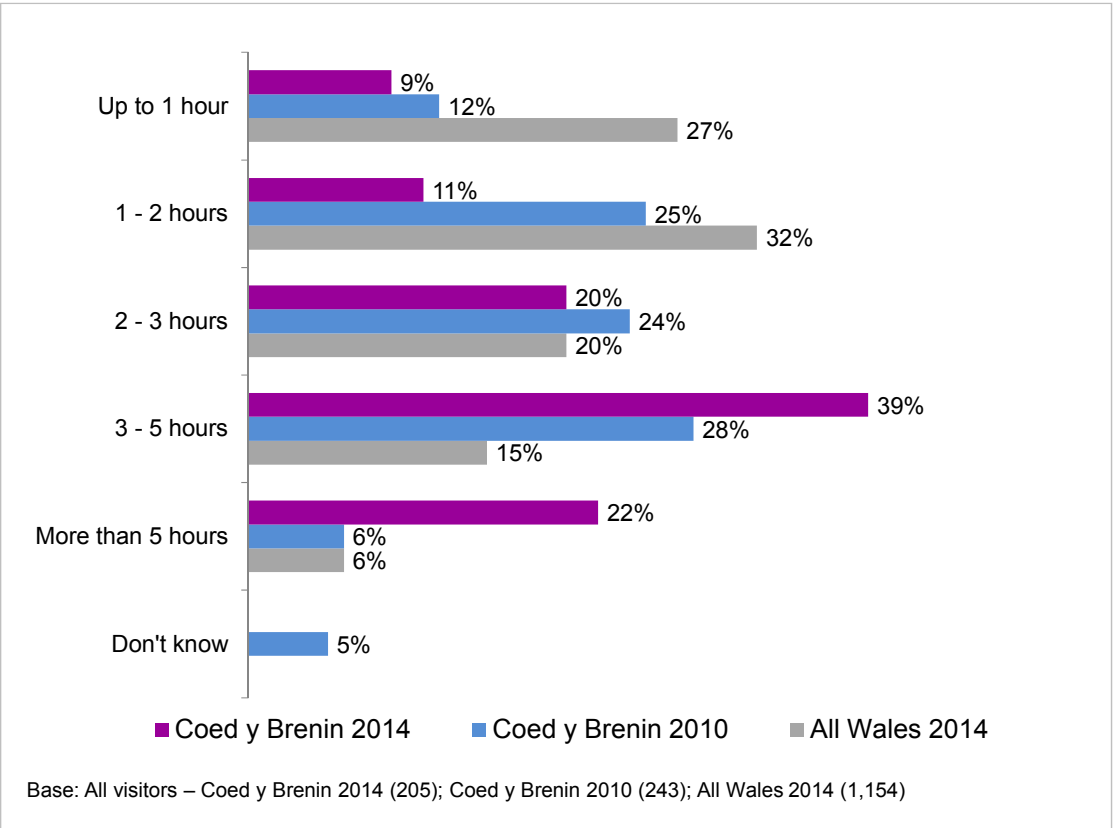


4.4 Length of visit

Visitors to Coed y Brenin spent on average 3 hours and 35 minutes at the site. In 2010, the average time spent was around an hour less, at 2 hours and 37 minutes, while across Wales on average in 2014, visitors spent 2 hours and 7 minutes at sites.

The lengths of time visitors spent at Coed y Brenin can be seen below in Figure 6 and show an increase in spending 3 hours or longer at the site, and a decrease in spending less than 2 hours on the visit:

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 Coed y Brenin was cycling, which almost three quarters took part in/intended to take part in (72%). This represents quite an increase on 2010 (52%) and is significantly higher than the all Wales average (22%).

Walking was therefore somewhat less likely to be mentioned than across Wales in general, with just over a third of Coed y Brenin visitors mentioning walking (34%) compared with 69% all Wales average. In 2010 just over half of Coed y Brenin visitors mentioned walking (51%).

Other popular activities at Coed y Brenin in 2014 included using the café / restaurant / other catering (57%), using the Visitor Centre / Shop (25%), and admiring the views (24%). Table 4 overleaf lists all the activities participated in.

The vast majority of visitors took part in 'active' activities (93%) which is an identical proportion to the 2010 research and slightly higher than the all Wales average of 87%.

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

	Coed y Brenin 2014 %	Coed y Brenin 2010 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	45	33	15
Cycling off trails or tracks	40	31	11
TOTAL CYCLING	72	52	22
Walking on a sign-posted trail	19	40	42
Walking but not following sign-posts	8	14	12
Dog walking	12	16	30
TOTAL WALKING	34	51	69
Using the café / restaurant / other catering	57	47	33
Using the Visitor Centre or shop	25	20	14
Admiring the views	24	3	26
Using the play area	10	19	15
Picnic or barbeque	9	5	17
Photography	6	8	11
Running / jogging	5	3	3
Bird watching	5	6	15
Nature / natural history visit	4	1	7
Organised trip / event	3	3	2
Seeing something in the forest	1	1	2
A forest drive	1	-	2
Camping	1	-	
Orienteering / Geocaching	<1	2	<1
Go Ape!	<1	4	
Other	3	3	2
Taken part in ACTIVE activities	93	93	87

Base: All visitors – Coed y Brenin 2014 (205); Coed y Brenin 2010 (243); All Wales 2014 (1,154)

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

4.6 Length of time spent on activities

Visitors who had taken part in certain physical activities were asked how long they had spent doing these. Walking and cycling activities have been analysed in Table 5 below.

As previously mentioned, visits to Coed y Brenin lasted 3 hours and 35 minutes on average. Those walking spent an average of 2 hours doing this whilst cyclists spent on average 3 hours and 6 minutes cycling. This is an increase in the amount of time spent doing both these activities since 2010: cycling is up by 14 minutes on average whilst the time spent walking increased more significantly, by 27 minutes. *NB there is a relatively low sample size of walkers of 55 respondents.*

Table 5: Q5/Q6. Time spent taking part in cycling and walking at Coed y Brenin (Actual respondents only)

	Total duration of visit		Time spent on any cycling		Time spent on any walking	
	2014 %	2010 %	2014 %	2010 %	2014 %	2010 %
Up to 30 minutes	1	-	1	4	13	11
31 – 60 minutes	8	12	5	5	15	19
1 – 2 hours	11	25	15	12	22	39
2 – 3 hours	20	24	35	30	20	16
3 – 5 hours	39	28	35	33	13	6
5+ hours	22	6	9	5	4	-
Don't know	-	5	-	11	15	10
AVERAGE	3 hrs 35 mins	1 hr 57 mins	3 hrs 6 mins	2 hrs 52 mins	2 hrs 0 mins	1 hr 33 mins

Base: All respondents - 2014 (205); 2010 (243); Respondents who cycled - 2014 (142); 2010 (106); Respondents who walked - 2014 (55); 2010 (114)

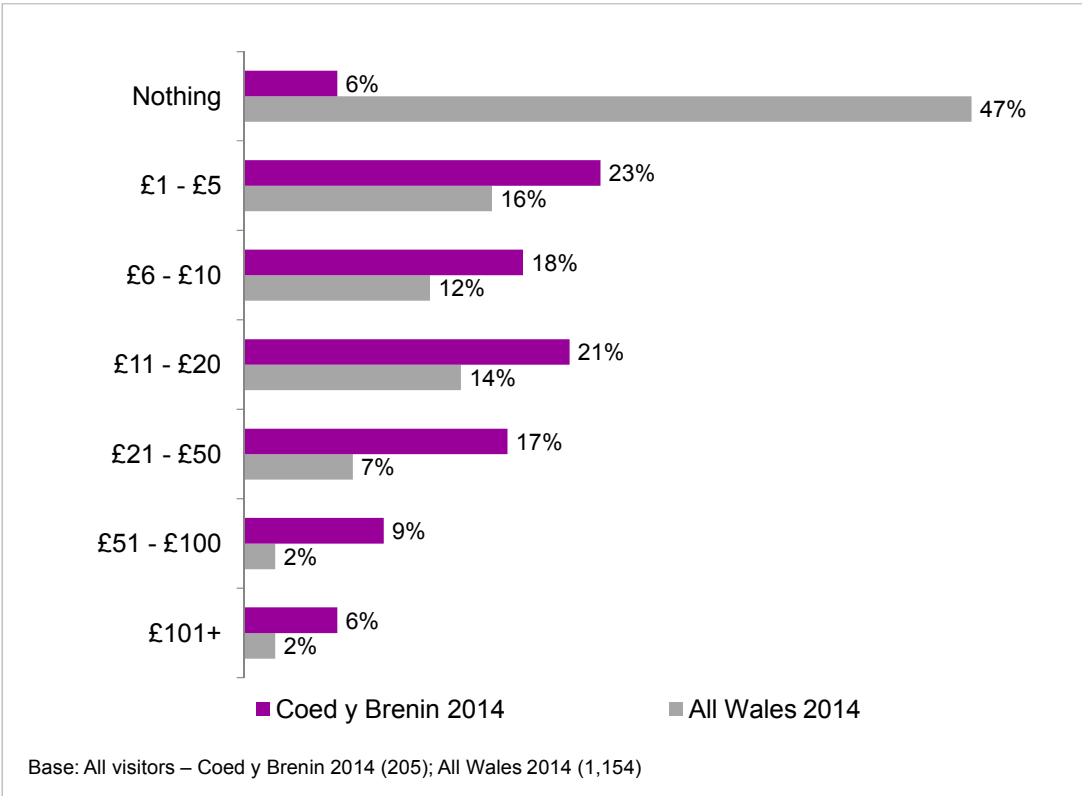
4.7 Money spent on site and in the area as a result of the visit

Visitors to Coed y Brenin were asked how much they would spend at the site during their visit on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. Figure 7 show the results calculated by combining the data across all types of spending.

Most visitors (94%) would spend some money at the site, which is much higher than average across all Wales sites, where just over half (53%) would spend anything.

Figure 7 below shows that visitors to Coed y Brenin spend more in each price range than across all Wales sites on average. Overall, Coed y Brenin visitors would spend £31.15 on average, compared with £11.15 all Wales average.

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



When looking at individual types of spending at the site, the item that the highest proportion of visitors to Coed y Brenin were likely to spend anything on was parking, with 78% planning to spend on this. The average planned spend on parking was £4.40, over double the all Wales average of £2.06. See Table 6a overleaf.

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.

More visitors planned to buy food and drink than across Wales on average: 64% were planning to spend money on food and drink at Coed y Brenin, spending £9.85 on average, whilst across Wales as a whole, 39% planned to spend money on food and drink (£5.53 average spend). NB not all centres have cafes/catering facilities.

One in ten planned to spend money hiring equipment, with an average spend of £6.34. A further 18% would spend on 'something else' (not specified) spending £9.64 here.

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

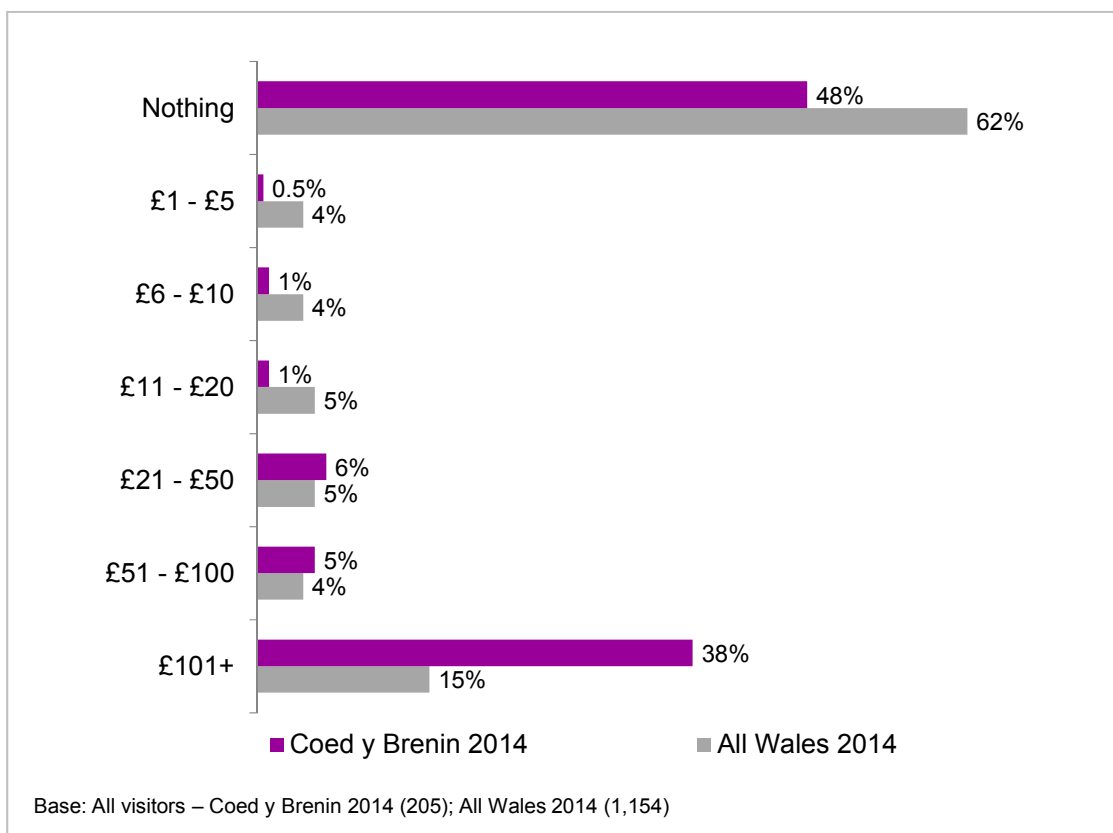
	% spending anything on items		Average spend on items £	
	Coed y Brenin %	All Wales %	Coed y Brenin £	All Wales £
Parking	78	41	£4.40	£2.06
Food and drink	64	39	£9.85	£5.53
Hiring equipment	10	2	£6.34	£1.25
Souvenirs / gifts	8	4	£0.93	£0.54
Activities at the site	1	1	£0.29	£0.06
Anything else	18	4	£9.64	£1.77

Base: All visitors – Coed y Brenin 2014 (205); All Wales 2014 (1,154)

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

Around half of visitors to Coed y Brenin claimed that they would not be spending anything in the area as a result of their trip (48%) while almost two fifths would spend over £101 (38%). The average spend in the area as a result of visiting Coed y Brenin was £237.04: considerably higher than the all Wales average of £84.86. As most visitors to Coed y Brenin were staying over in the area, it is unsurprising that they plan to spend more than average across all Wales sites, where typically visitors are more likely to be on a day trip than staying over.

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



Looking at specific spend in the local area as a result of their visit to Coed y Brenin, food and drink and accommodation were mentioned by the highest proportion of visitors (46% and 40% respectively). On average, visitors were likely to spend £80.58 on food and drink and £106.07 on accommodation, both these amounts were substantially higher than the all Wales average (£26.37 and £50.24 respectively).

A quarter would spend money on transport, with an average likely spend of £20.20 (double the all Wales average).

Other areas of spending include parking (18%, spending £2.65 on average), buying souvenirs or gifts (14%, spending £6.55 on average) and entrance fees (12%, spending £19.71 on average).

The proportion of visitors planning to spend money on each category was higher for all categories than the all Wales average – see Table 6b overleaf:

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

	% spending anything on items		Average spend on items £	
	Coed y Brenin %	All Wales %	Coed y Brenin £	All Wales £
Food and drink	46	27	£80.58	£26.37
Accommodation	40	15	£106.07	£50.24
Transport	25	20	£20.20	£9.83
Parking	18	10	£2.65	£1.56
Souvenirs / gifts	14	7	£6.55	£2.68
Admissions to other attractions	12	5	£19.71	£4.97
Hiring equipment	2	1	£0.80	£0.20
Anything else	8	3	£2.16	£2.37

Base: All visitors – Coed y Brenin 2014 (205); All Wales 2014 (1,154)

5. Perceptions of the site

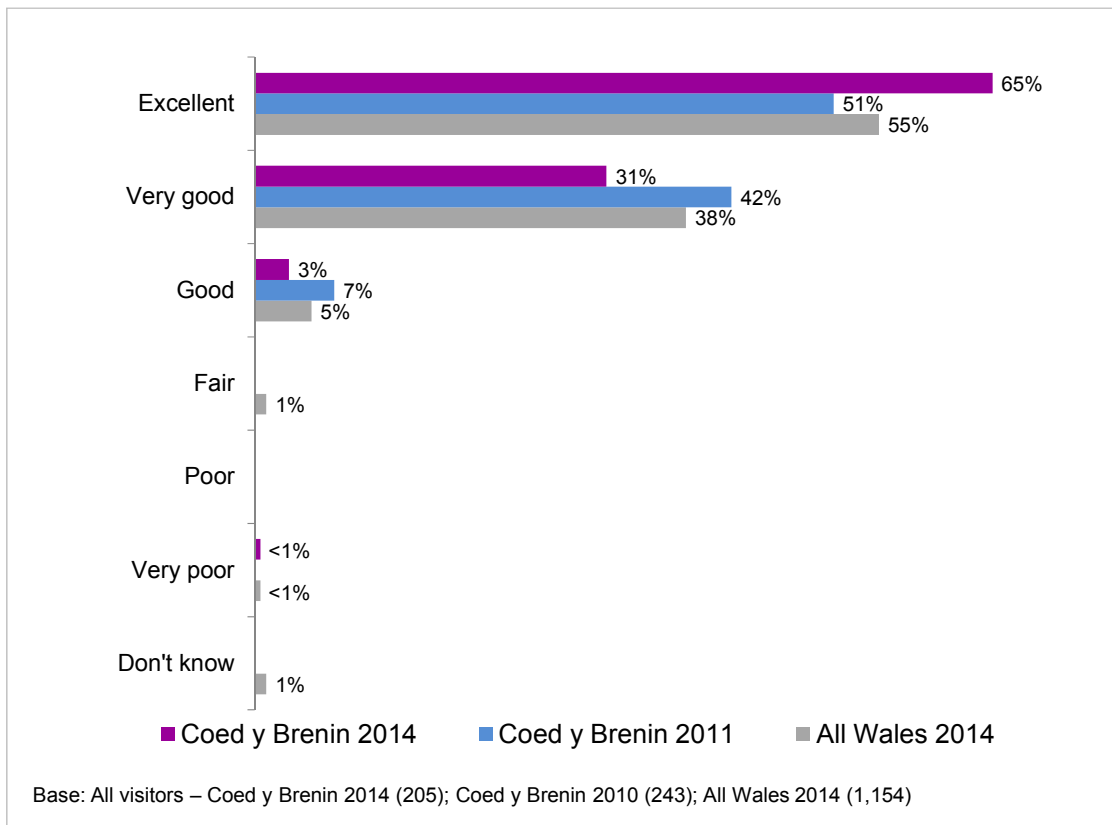
5.1 Overall rating of the site as a place to visit

Perceptions of Coed y Brenin as a place to visit remain very positive. This was also true across all Wales sites.

Almost two thirds (65%) rated the site as excellent, which is somewhat higher than the all Wales average (55%) and also considerably higher than the 2010 survey findings (51%).

A further third (31%) gave the site a rating of very good and 3% rated it as good.

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

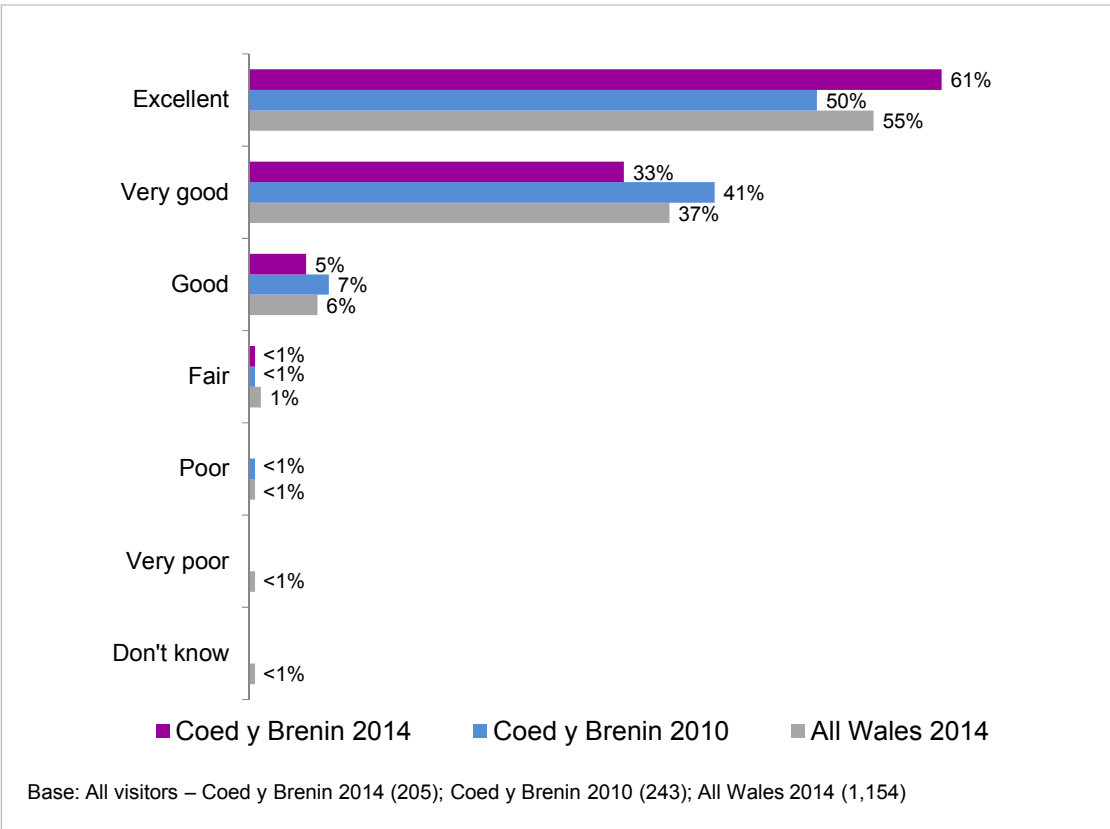


5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Coed y Brenin was were also very positive. This was also true across all Wales sites, and views were more positive in 2014 compared with 2010.

Over three fifths of visitors gave this measure an 'excellent' rating (61%) which is higher than the all Wales average of 55% and the 2010 findings (50%). Another third (33%) gave a 'very good' rating for how safe and welcoming Coed y Brenin felt and 5% gave a 'good' rating.

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



Visitors were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the site. Table 7 overleaf details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Coed y Brenin and all Wales sites.

The signposting, maps and information boards were the most often mentioned element of the site, with 28% of positive raters saying this. This was closely followed by mentions of the site being well laid out, well organised and being set-up well (27%) and the fact there were good facilities and amenities there (25%). The good paths, trails and tracks were also important to Coed y Brenin visitors, with over a fifth of positive raters mentioning these (21%).

These findings were quite different to across Wales in general where typically the beautiful the scenery and peaceful and tranquil environment were more likely to be mentioned – 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

	Coed y Brenin 2014 %	All Wales 2014 %
Well signposted / good maps / info boards	28	16
Well laid out / well organised / good set-up	27	14
Good quality facilities / amenities	25	14
Good provision of paths / trails and tracks	20	16
Clean / tidy / well maintained / litter free	18	17
Friendly / helpful staff or rangers	18	9
The scenery / views / beautiful environment	16	41
Safe environment generally for all people	14	28
Peaceful / pleasant / tranquil / relaxing / welcoming	11	32
Good, safe place for the kids to play / run around	10	15
Fresh air / open space / plenty of space / freedom	9	22
Other visitors are friendly	9	6
Good car parking	5	5
Good café / catering	3	1
Plenty of other people around	3	1
Live locally / convenient / easy to get to / close	2	8
General positive comments	3	1
Some negative comments	1	3

Base: Visitors rating the site as excellent, very good or good – Coed y Brenin 2014 (204); All Wales 2014 (1,137)

Other aspects of the site mentioned by small numbers of visitors (1%) included:

- Away from cars / no cars / cars drive slowly
- Dog friendly
- Plenty of staff / rangers
- Plenty to do / has everything you want.

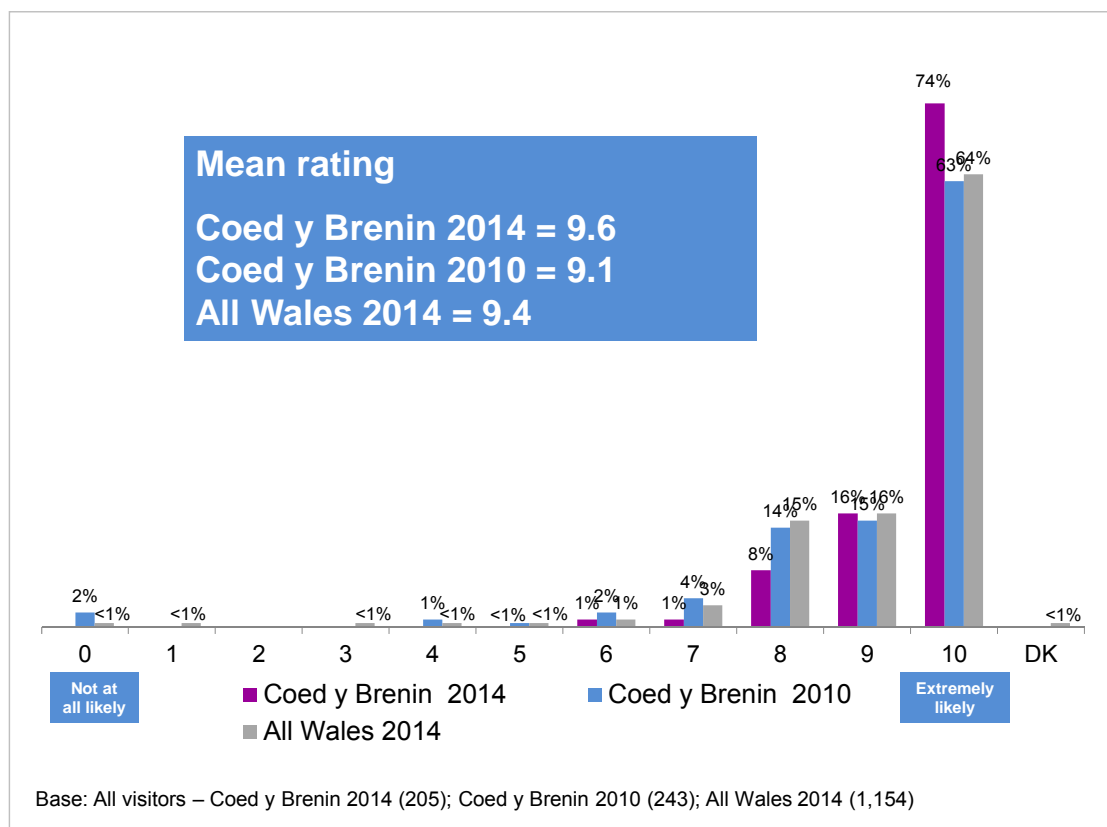
5.3 Recommending the site as a place to visit

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

Scores for Coed y Brenin and all Wales sites generally were extremely positive with Coed y Brenin scoring an impressive 9.6 out of 10 – an improvement on 2010 when it scored a still extremely positive, 9.1. On average, all sites in Wales were scored as 9.4.

Three quarters (74%) gave a rating of 10 out of 10, which was higher than both the previous Coed y Brenin study in 2010 (63%) and the all Wales score (64%). See Figure 11 below:

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



These results can be analysed further by using a Net Promoter Score (NPS), which divides 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 Coed y Brenin is 89, which is significantly higher than the score of 72 seen in 2010 and also much higher than the all Wales score of 78. As the following section further confirms, recent improvements to the site are being noticed and appreciated by visitors.

5.4 Favourite things about the site

Visitors to Coed y Brenin 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.

Three favourite things about Coed y Brenin stood out. As a renowned mountain biking site, it was unsurprising that the most mentioned aspect were the cycle trails, the freedom and opportunity to cycle (53%). The second most popular element were the good onsite facilities (41%), which was followed by the scenery and views (34%).

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

Activities	Coed y Brenin 2014 %	Coed y Brenin 2010 %	All Wales 2014 %
Cycle trails / freedom / opportunity to cycle	53	34	16
Good on-site facilities / BBQ / shop	41	16	16
Scenery / views / beautiful / natural	34	43	47
Walks / paths / trails	25	37	34
Peace / tranquillity / relaxation / atmosphere	20	33	49
Clean / well looked after	10	7	9
Café / restaurant	8	-	3
Close to home / convenient location	7	6	12
Fresh air / being outside	7	19	17
Helpful / pleasant staff	7	4	2
Plenty / cheap / good parking	5	2	4
Activities that are good for the children	4	12	9
Safe environment	4	10	10
Lots to see and do	4	5	3
Well signposted / good maps / info boards	4	-	1
Like forests / trees / variety of trees and plants	3	9	10
Wildlife / bird watching	2	10	18
The weather	2	-	2
Good accessibility	2	-	4
Exercise / keeping fit	2	14	7
Opportunity to spend time with family / friends	2	3	4
Been before / wanted to come again	2	3	6
Ideal for dogs / dog friendly / safe for dogs	2	-	4
Well laid out / good layout	2	-	1
Something different / a change	2	-	1
Something for everyone	2	-	1

Base: All visitors – Coed y Brenin 2014 (205); Coed y Brenin 2010 (243); All Wales 2014 (1,154)

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

- Rivers / creeks / waterways
- Cost / value for money / free
- Information Centre
- Play area.

The improvements to Coed y Brenin are clearly being appreciated by the visitors, as shown by the changes in these findings since the previous survey in 2010: only a third mentioned the cycle trails / freedom / opportunity to cycle (34%) in 2010 and just 16% mentioned the onsite facilities. Back then, visitors were most likely to mention less man-made or managed aspects to Coed y Brenin and instead concentrated on the natural environment such as the scenery (43%), the walks, paths and trails (37%) and the peace/tranquillity (33%). Whilst these aspects are still appreciated, it is the cycle trails and on site facilities that now take the top two slots.

There were a few differences observed between different sub-groups of the sample in 2014:

- Younger visitors were more likely to mention the cycle trails / freedom / opportunity to cycle; 64% of 16-34s.
- Older visitors were slightly more likely to mention the peace and tranquillity (31% of over 55s, compared with 20% on average) and the good on-site facilities (50% of over 55s, compared with 41% of the total sample).
- Staying visitors were more likely to mention the cycle trails than day visitors (57% vs 45%). Similarly, repeat visitors were more likely to mention this than first time visitors (56% vs 47%).

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.

Nearly half of visitors to Coed y Brenin could not think of anything that would add to their enjoyment and only made positive comments (45%). This was almost identical to the all Wales average of 46%. Therefore, suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 overleaf outlines the comments that were made by 2% or more.

The most frequently mentioned improvements related to a request for more trails, paths and cycle tracks (14%), better parking (7%) and improved signage and maps (7%).

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

	Coed y Brenin 2014 %	All Wales 2014 %
Nothing / general positive comments	45	46
More trails / paths / cycle tracks	14	4
Better parking (easier, cheaper, free)	7	3
Improve signage / more maps / better maps	7	6
More activities for children / more play areas	3	4
Improve café / catering	3	3
Longer / more challenging trials, paths and cycle routes	3	2
Easier / less challenging trials, paths and cycle routes	3	1
Better weather / more sunshine	3	2
Longer opening hours (shop, main gates)	2	1
More / larger cycle racks / storage / bike wash	2	1
Ski lift / uplift	2	<1
Having a cashpoint / accept card payments	2	1
Better access / more accessible (including for disabled people)	2	2
Bike hire / better bikes / child bike seats	2	1

Base: All visitors – Coed y Brenin 2014 (205); All Wales 2014 (1,154)

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

- Improve toilets / more toilets / changing areas / showers
- More litter bins / recycling bins / less litter
- Improve maintenance of paths, tracks and trails
- Expand Go Ape! / more zip wires
- More information on wildlife / vegetation / area
- Cheaper café
- On-site pub.

When asked if there was anything that interfered with their enjoyment of the site, seven in ten reported that nothing had interfered with their enjoyment (70%) which was identical to the all Wales average. Therefore the comments that were made were mentioned by a very small proportion of visitors. Any comment mentioned by 2% of more visitors is detailed in Table 10 overleaf:

The weather was a problem for one-in-ten of the sample (10%) whilst problems getting around the site, trails being closed or no access was an issue for one-in-twenty (5%). Just 3% mentioned a need for better / clearer signs and the same proportion reported a problem with midges in the café. Another 2% felt the car parking was too expensive or should be free and the same proportion said they had received poor service in the café or had found some aspect of the café to be unsatisfactory (opening hours, queues etc).

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

	Coed y Brenin 2014 %	All Wales 2014 %
Nothing	70	70
Wet / raining / windy (poor weather)	10	8
Problems getting around the site (trails closed, no disabled access)	5	2
Signs unclear / need better signs / maps	3	3
Midges (in the café)	3	1
Car park expensive / should be free parking	2	1
Poor service in café / long queues / inconvenient opening hours	2	1

Base: All visitors – Coed y Brenin 2014 (205); All Wales 2014 (1,154)

Other issues for small proportions of visitors (1%) were:

- Problems with car parks (faulty machines / not enough spaces)
- Poor maintenance of the site
- Dog mess on paths / in play area.

6. Site facilities

6.1 Importance of site facilities

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

Cycle trails were mentioned by the highest proportion of visitors to Coed y Brenin (67%) which was an increase on last time's research where just 39% mentioned this. Across Wales the average is 21%.

Refreshment facilities were the second most important factor at Coed y Brenin with over four in ten mentioning the café / restaurant / catering facilities (43%) This is again an increased on last time's research where 25% mentioned refreshment facilities, similar to the all Wales average this time (23%).

The toilet facilities were mentioned by 28% of visitors and a similar proportion mentioned the car parking (26%). Walking trails were only mentioned by 16% of visitors, which is a drop since 2010 (23%) and lower than the all Wales average of 49%. The Visitor Centre attracted 15% of visitors in 2014 (not mentioned in 2010) and 12% said the ability to hire bicycles was important (up from 2% in 2010). See Figures 12a below and 12b overleaf for full details:

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

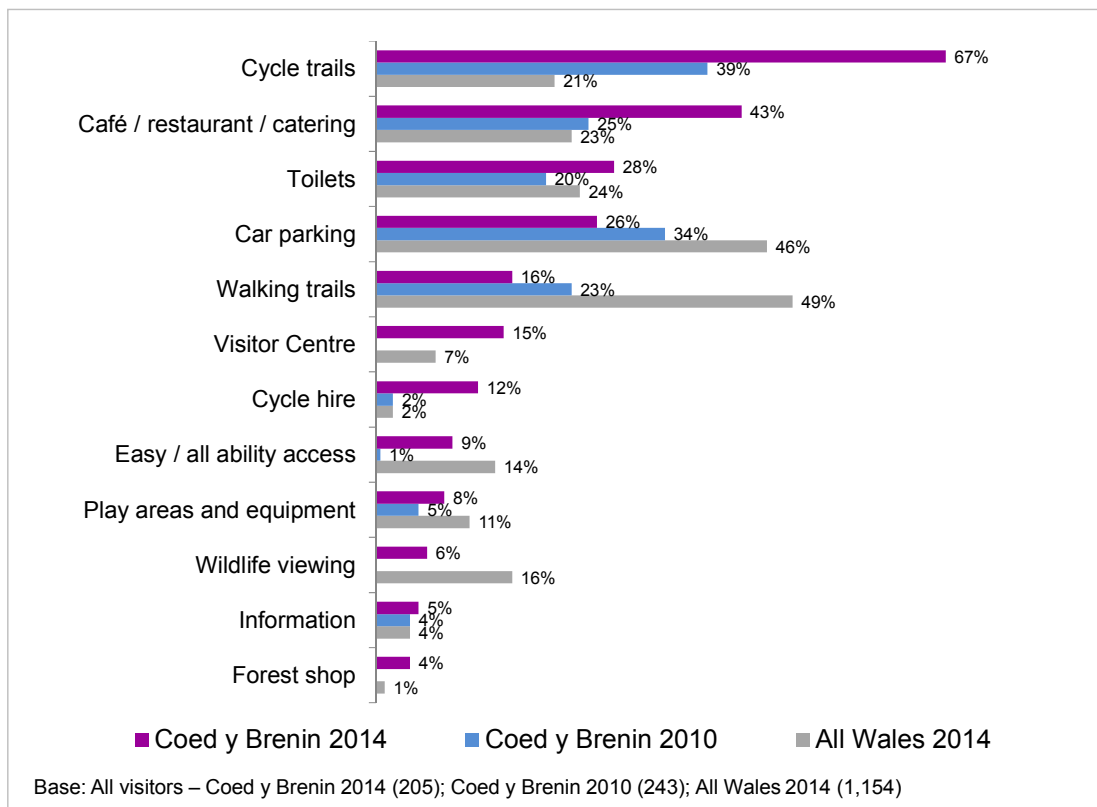
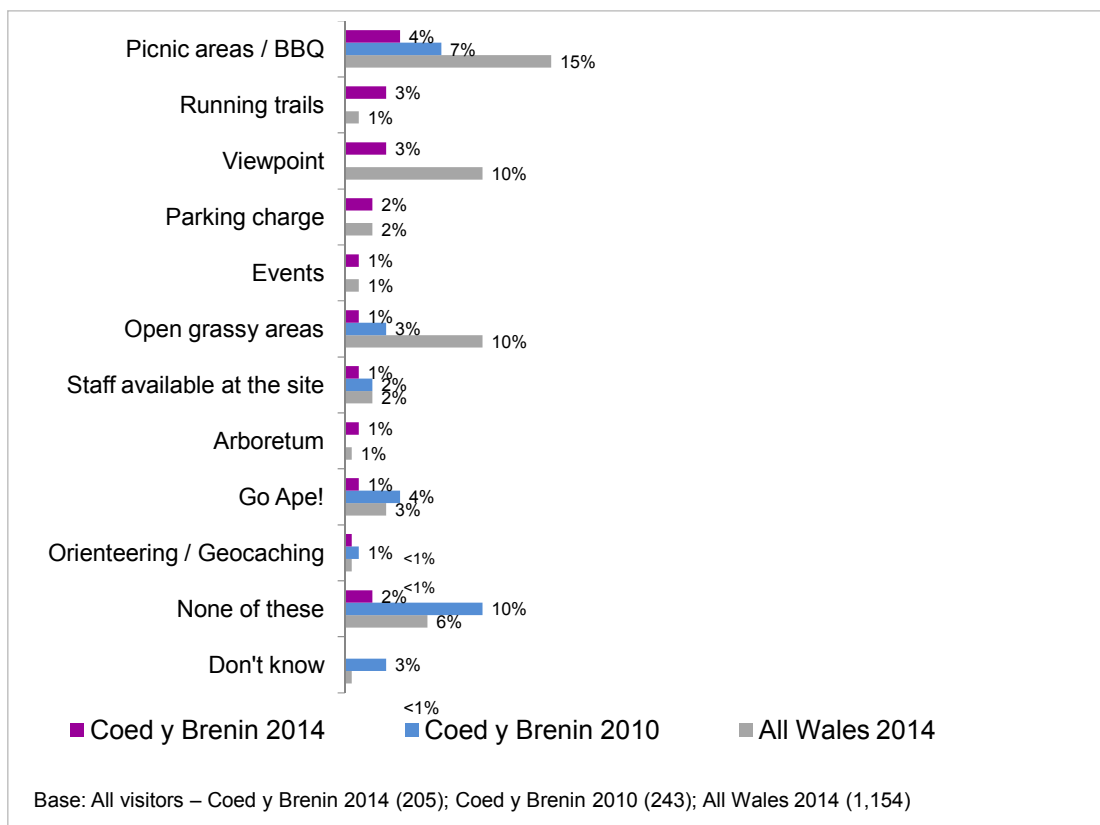


Figure 12b: Q13. Importance of facilities in deciding to visit - cont'd



Certain other factors (apart from site facilities) were important to around a third of visitors (37%) 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 overleaf in Table 11.

The main mentions were that it was close to home / local / convenient (7%) or close to where I am staying (7%), good facilities (5%) or just passing by (3%).

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

	Coed y Brenin 2014 %	All Wales 2014 %
Nothing	63	60
Close to home / local / convenient	7	7
Close to where I am staying (staying visitors)	7	2
Good facilities	5	3
Was just passing by / en route	3	5
Wanted to go walking / cycling	2	3
Beautiful scenery / views / natural beauty	2	2
Family / friend recommended it	2	1
Meeting / visiting with family and friends	2	3
Good value for money / cheap / free	2	1
Something different / a change	2	1

Base: All visitors – Coed y Brenin 2014 (205); All Wales 2014 (1,154)

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

- A nice day out
- Dog friendly
- Easily accessible
- Been before / good memories
- Good weather
- Outdoors / fresh air
- Good for the children to run around and play.

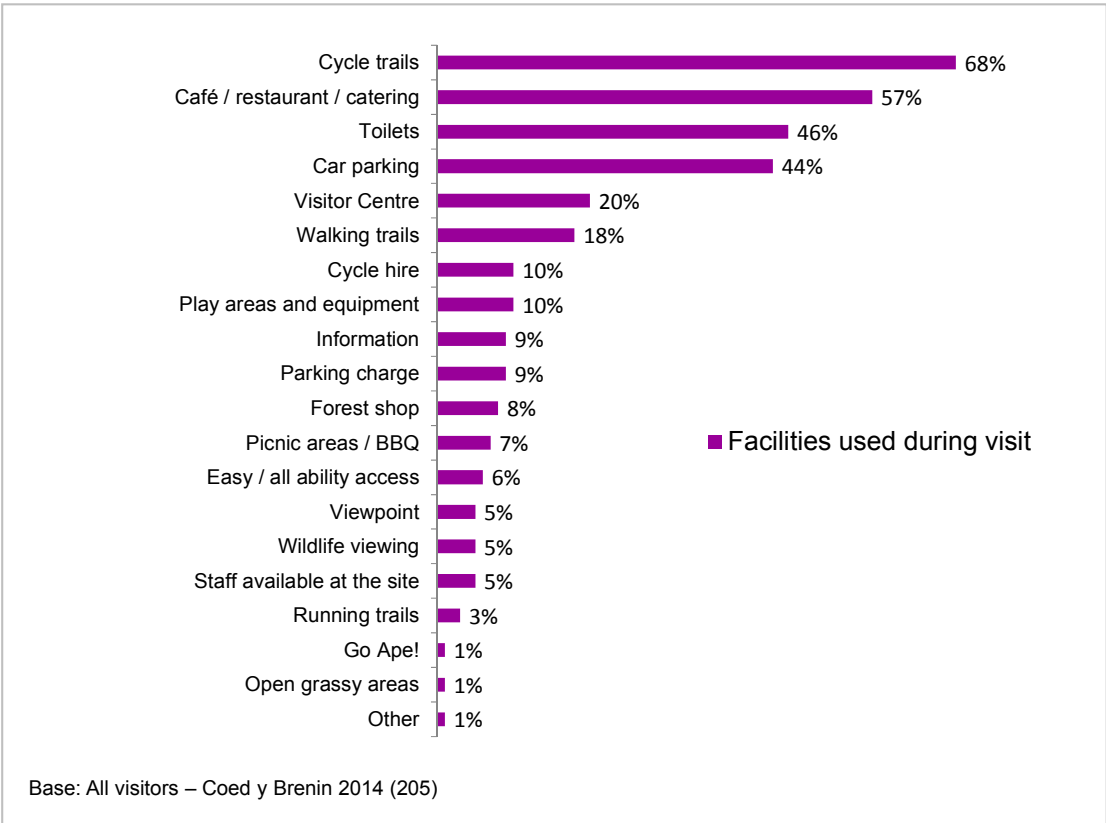
6.2 Facilities used

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 the importance of facilities: cycle trails were used by the highest proportion of visitors (68%), followed by the café / restaurant / catering facilities (57%).

The toilets and the parking were used by 46% and 44% respectively and 20% used the Visitor Centre. One in five (18%) used the walking trails - see Figure 13 below for full details.

Figure 13: Q15a. Facilities used at Coed y Brenin 2014



On a slightly different note, 17% of visitors had a dog with them and the majority of these (85%) 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 Coed y Brenin have been detailed in Figure 14 below. Ratings of most of the facilities were extremely positive, with virtually no visitors interviewed giving any of these facilities a poor rating; the majority gave a positive rating of either ‘excellent’, ‘very good’ or ‘good’. The only negative rating was the 1% who rated the toilets as poor.

The highest rating was received for the cycle trails which 70% rated as excellent and a further 27% rated as very good or good. The remainder rated them as fair or don’t know; there were no negative ratings received.

The Visitor Centre was also rated very positively with 56% saying it was excellent, 32% saying it was very good and 7% good. The remaining 5% said they didn’t know, meaning again no negative ratings were received. A similar proportion rated the Walking Trails positively with 53% saying there were excellent, 33% very good and 8% good.

Figure 14 below illustrates the ratings given for each facility used.

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

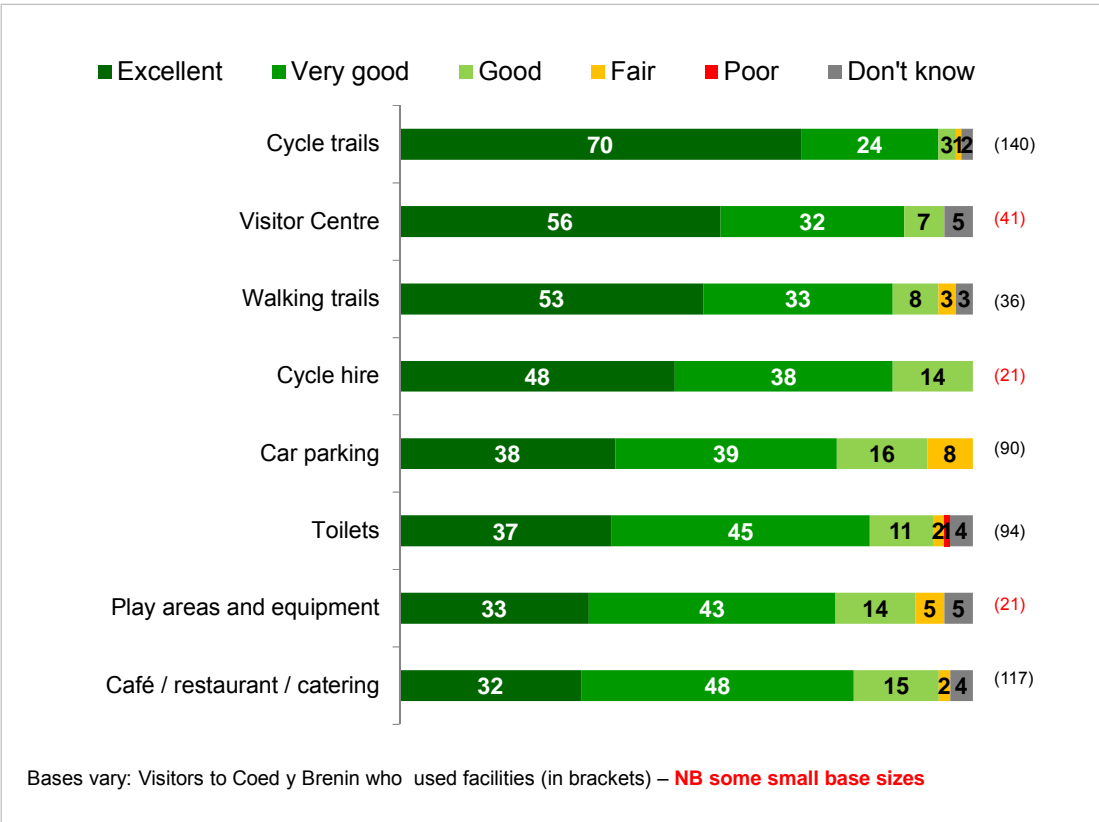


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2014 compared to 2010, where they were mentioned in the previous survey.

For all but one of the facilities listed, the proportion who gave an 'excellent' rating has increased since the previous research, with the most significant increases seen in the proportions rating the cycle hire, cycle trails and walking trails as excellent (increases of 26, 24 and 19 per cent points respectively).

Car parking was, however, less likely to be rated as excellent in 2014, which at 38% was 10 per cent points lower than in 2010.

Table 12: Q15b – Proportion rating facilities at Coed y Brenin as 'Excellent' 2014 vs. 2010

Facilities	Coed y Brenin 2014 %	Coed y Brenin 2010 %	% point change
Cycle trails	70	46	+24
Visitor Centre	56	-	-
Walking trails	53	34	+19
Cycle hire	48	22	+26
Car parking	38	48	-10
Toilets	37	29	+8
Play areas and equipment	33	33	-
Café / restaurant / catering	32	24	+8

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 Coed y Brenin 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 (48%) which is similar to 2011 and to the all Wales average. As would be expected, this finding was much higher amongst repeat visitors (65%) than first-time visitors (14%).

Over a quarter of visitors heard about Coed y Brenin through word of mouth (29%), with first-time visitors being more likely to have found out about the site through word of mouth (44%) than repeat visitors (21%).

Other main sources of awareness included Google / internet search (10%) and road signs (4%). See Table 13 below for full details:

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

	Coed y Brenin 2014 %	Coed y Brenin 2010 %	All Wales 2014 %
Always known about it / been here before	48	41	51
Word of mouth	29	35	20
Google / other search engine	10	-	5
Road signs	4	1	5
Just passing / en route	3	2	13
Magazine (unspecified)	3	-	1
Map	3	3	2
Forestry Commission website	3	-	1
Sporting magazine	3	-	1
Mountain Biking Wales website	2	-	<1
Accommodation provider	2	-	2

Base: All visitors – Coed y Brenin 2014 (205); Coed y Brenin 2010 (243); All Wales 2014 (1,154)

Other sources of information mentioned by a small proportion of visitors (1%) included:

- Leaflets
- NRW website
- Other websites
- Books / guide books.

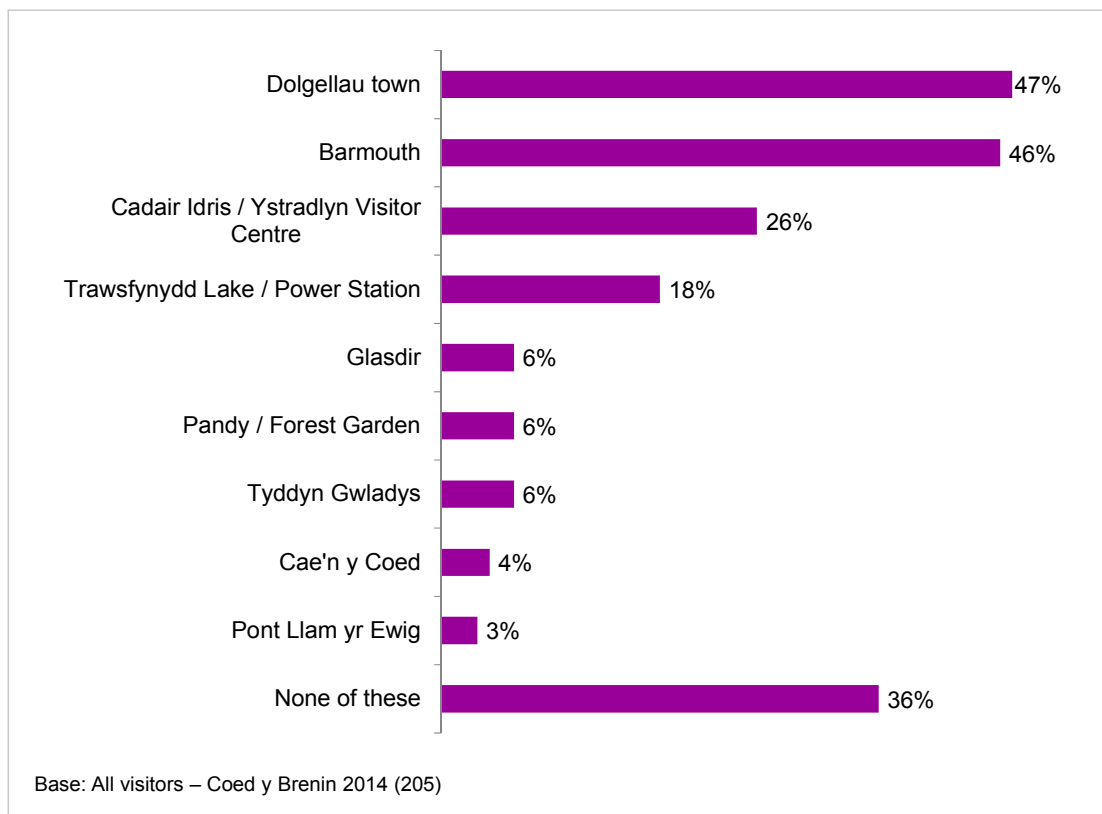
8. Visiting other areas and attractions

Visitors to Coed y Brenin 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 (64%) had visited at least one. See Figure 15 below.

Dolgellau town and Barmouth were visited by the highest proportion of Coed y Brenin visitors (47% and 46% respectively), followed by Cadair Idris / Ystradlyn Visitor Centre (26%) and Trawsfynydd Lake / Power Station (18%).


One in twenty (6%) Coed y Brenin visitors had also been to Glasdir, to Pandy / Forest Garden and to Tyddyn Gwladys in the past year, whilst 4% had visited Cae'n y Coed and 3% had been to Pont Llam yr Ewig.

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</u> <u>Experience – Year 2</u> <u>FINAL</u>	FOR OFFICE USE ONLY		INTERVIEWER RECORD
				WEATHER CONDITIONS (3-6m) CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____
		Case No.	Point (1-2)	

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

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

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

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

(7)
1
2
3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

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

- English
- Welsh

(8)
1
2

ASK ALL

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

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

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

SHOWCARD A

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

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

(17)

1
2
3
4
5

SHOWCARD B

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

First visit

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

(18)

1

2
3
4
5
6
7
8
9

ASK ALL

SHOWCARD C

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

PROBE - Any others?

RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

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

RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED

ASK ALL

SHOWCARD C AGAIN

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

RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED

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

ASK ALL

SHOWCARD D

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

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

Don't know

(45)

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

INSTRUCTIONS:

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

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

SHOWCARD D AGAIN

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

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

ASK ALL

SHOWCARD E

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

ASK ALL

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

(75-78m)

- 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

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

Other (please specify)

(79-82m)

Nothing

L

Don't know

M

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

(83-86m)

- 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

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

COED Y BRENIN

ASK ALL

SHOWCARD G4

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	Arboretum	2
B	Café / restaurant / catering	6
C	Car parking	7
D	Cycle hire	9
E	Cycling trails	A
F	Easy / all ability access	C
G	Events	D
H	Forest Shop	G
I	Go Ape!	H
J	Information available / interpretation	M
		(109-112m)
K	Open grassy areas	2
L	Orienteering / Geocaching	3
M	Parking charge	4
N	Picnic areas / BBQ	5
O	Play areas and equipment	7
P	Running trails	9
Q	Staff available at the site	A
R	Toilets	B
S	Viewpoint	D
T	Visitor Centre	E
U	Walking trails	F
V	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

COED Y BRENIN

ASK ALL

SHOWCARD G4 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	Arboretum	2	1	2	3	4	5	6	7	(141)
B	Café / restaurant / catering	6	1	2	3	4	5	6	7	(145)
C	Car parking	7	1	2	3	4	5	6	7	(146)
D	Cycle hire	9	1	2	3	4	5	6	7	(148)
E	Cycling trails	A	1	2	3	4	5	6	7	(149)
F	Easy / all ability access	C	1	2	3	4	5	6	7	(151)
G	Events	D	1	2	3	4	5	6	7	(152)
H	Forest Shop	G	1	2	3	4	5	6	7	(155)
I	Go Ape!	H	1	2	3	4	5	6	7	(156)
J	Information available / interpretation	M	1	2	3	4	5	6	7	(160)
		(129-132m)								
K	Open grassy areas	2	1	2	3	4	5	6	7	(164)
L	Orienteering / Geocaching	3	1	2	3	4	5	6	7	(165)
M	Parking charge	4	1	2	3	4	5	6	7	(166)
N	Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
O	Play areas and equipment	7	1	2	3	4	5	6	7	(169)
P	Running trails	9	1	2	3	4	5	6	7	(171)
Q	Staff available at the site	A	1	2	3	4	5	6	7	(172)
R	Toilets	B	1	2	3	4	5	6	7	(173)
S	Viewpoint	D	1	2	3	4	5	6	7	(175)
T	Visitor Centre	E	1	2	3	4	5	6	7	(176)
U	Walking trails	F	1	2	3	4	5	6	7	(177)
V	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 _____
- Activities available at this site _____
- Parking _____
- Souvenirs / gifts _____
- Hiring equipment such as boats, bikes or horses _____
- Anything else _____

- (237-240)
- (241-244)
- (245-248)
- (249-252)
- (253-256)
- (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 _____
- Accommodation (if staying overnight) _____
- Admission to other attractions _____
- Parking _____
- Transport, including public transport, taxis and petrol _____
- Souvenirs / gifts _____
- Hiring equipment such as boats, bikes or horses _____
- Anything else _____

- (261-264)
- (265-268)
- (269-272)
- (273-276)
- (277-280)
- (281-284)
- (285-288)
- (289-292)

COED Y BRENIN

FOU: (335-369 FOR Q19)

ASK ALL

SHOWCARD K4 (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

- Barmouth
- Cadair Idris / Ystradlyn Visitor Centre
- Cae'n y Coed
- Dolgellau town
- Glasdir
- Pandy / Forest Garden
- Pont Llam yr Ewig
- Trawsfynydd Lake / Power Station
- Tyddyn Gwladys

- None of these
- Don't know

(350-353m)

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

FOU: (370-410 FOR Q20)

Q20a How did you travel to this site today?

READ OUT – SINGLE CODE

IF MORE THAN ONE USED, CODE FOR MODE USED TO TRAVEL FARTHEST

- Own car
- Hire car
- Mini bus
- Cycled
- Public transport
- Walked

Other (please specify) _____

Don't remember

(385)

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

Q20bi INTERVIEWER – CODE IF RESPONDENT HAS A DOG WITH THEM

Yes

No

(386)

- 1 **Q20bii**
- 2 **Q21**

Q20bii 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?

- Yes
- No

Don't know

(387)

- 1
- 2
- 3

ASK ALL

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

Q21 INTERVIEWER RECORD GENDER

(415)

Male

1

Female

2

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

(416)

16-24 years

1

25-34 years

2

35-44 years

3

45-54 years

4

55-64 years

5

65+ years

6

Refused

7

SHOWCARD M

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

(417)

SINGLE CODE

Employee in full time job (30 hours plus a week)

1

Employee in part time job (under 30 hours per week)

2

Self-employed full or part time

3

On a government supported training programme

4

Full time education at school, college or university

5

Unemployed and available for work

6

Permanently sick / disabled

7

Wholly retired from work

8

Looking after the home

9

Other (please specify) _____

Refused

Z

Q24 Can you tell me the occupation of the Chief Income Earner within the household?
(The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. This person can be of either sex.)

(418)

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

Job title _____

Position / Grade _____

AB

1

C1

2

C2

3

DE

4

Refused

5

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.

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