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Research Report

Quality of the Visitor
Experience 2014

Cors Caron



Prepared for:
Natural Resources Wales /
Forestry Commission England

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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 176 visitor interviews conducted at Cors Caron in 2014. Throughout the report, comparisons have been made to the all Wales average (aggregated data from all 7 sites surveyed in 2014).

1.2 Cors Caron

The **Cors Caron** nature reserve, between Tregaron and Pontrhydfendigaid in Southwest Wales, covers an area of some 2,000 acres.

The site comprises three raised bogs built up from deep layers of peat that have taken around 12,000 years to form. It is a wild landscape made accessible by a network of boardwalks that enable visitors to get right into the heart of varied habitats and to enjoy seeing the wildlife at close quarters.

Running in and around the reserve is the River Teifi, which is designated as an SAC in its own right because it supports interesting species of fish, otters and aquatic plants.

1.3 Perceptions of the site

Perceptions of Cors Caron as a place to visit were very positive. This was also true across all Wales sites. Nobody interviewed at Cors Caron gave a negative rating of the site, and 55% said it was excellent.

Visitors were similarly positive about how safe and welcoming Cors Caron was with again no-one giving a negative rating and almost half (53%) saying it was excellent.

When asked whether they would be likely to recommend Cors Caron as a place to visit to a friend or relative (using a score of 0-10), scores for Cors Caron and all Wales sites generally were extremely positive with an average of 9.3 at Cors Caron compared with 9.4 across all Wales.

1.4 Strengths of the site

One main aspect of Cors Caron that stood out was the peace, tranquillity and relaxation that visitors experienced there (63% said it was favourite thing about Cors Caron). Other popular features of the site, as mentioned by over a third of visitors each (36%), were the bird watching, the scenery and views and the walks, paths and trails.

1.5 Areas for improvement

Just over a third (36%) of visitors to Cors Caron could not think of anything that would add to their enjoyment and only made positive comments, which was somewhat lower than the average across Wales (46%).

The suggested improvements that were made included a request for better dog poo control at the site, with almost a quarter of visitors asking for more dog poo bins, or for the dog poo to be removed (22%). Similarly, when asked if anything had interfered with their enjoyment that day, 19% said that dog mess on the paths had been a problem for them. Other improvements suggested included a request of for a cafe or catering facilities (14%), better signage and maps (8%), more litter bins (7%) and more information on wildlife / vegetation in the area (6%).

1.6 Visitor profile

The majority of visitors to Cors Caron had visited the site before (75%). This is similar to the all Wales average of 71%.

Visitors to Cors Caron were more likely to be frequent visitors than seen on average across Wales, with almost half visiting monthly or more often (49%) compared with 31% across Wales. This is particularly true for daily visits which are almost four times as likely at Cors Caron than the all Wales average (11% vs. 3%).

However, less time was spent at Cors Caron on each visit than average; Cors Caron visitors spent 1 hour 26 minutes on their visit compared with 2 hours 7 minutes across Wales on average.

Two thirds of Cors Caron visitors (68%) were on a day trip whilst a third (32%) were staying visitors. This is very similar to the all Wales profile of 65% day trippers and 34% staying visitors. There were some differences in type of day trip being taken, with the majority of Cors Caron visitors being on a short trip of less than 3 hours from home (63%), whereas across Wales on average, less than half of visitors were on this type of trip (49%).

Group sizes were slightly smaller at Cors Caron (averaging 2.7 people), compared with the all Wales average (3.3 people). Slightly fewer visitors were there with children than typically seen across all Wales sites (31% vs. 37%).

The demographic profile of visitors to Cors Caron was also slightly different to that of the visitors to all the Wales sites, with more visitors being older and Welsh speaking than average, and less having children or working full time.

The gender profile was very even, with 52% of visitors being male, and 48% being female. This was virtually identical to the all Wales figures.

As mentioned, Cors Caron visitors tended to be older than all Wales visitors: 30% were under 45 and 70% were 45+ (which includes 28% who were 65+). Across Wales sites on average, 42% were under 45 and 57% were 45+.

The profile for working status at Cors Caron mirrors the age profile, with more visitors than average being retired (34% vs. 19%) and consequently less working full time.

In line with the all Wales average, Cors Caron visitors tended more towards the ABC1 socio-economic groups (professional and non manual workers) 67%, than the C2DE groups (skilled and unskilled manual workers and the unemployed), 30%. Across all Wales sites 72% were ABC1 and 27% C2DE.

A quarter (25%) of Cors Caron visitors had children in the household, which was slightly lower than the all Wales figure (34%).

Almost a third of visitors to Cors Caron spoke Welsh (31%): 19% fluently and 12% non-fluently. This is much higher than the all Wales average of 22% Welsh speakers (11% fluent, 11% non-fluent). The majority of visitors to Cors Caron were White British/Welsh/Irish (96%), with very few describing their ethnicity as 'White other nationality' (3%) or 'Black/Asian/Mixed' (1%). This is identical to the all Wales average.

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 Cors Caron, interviewing took place between 29th March and 26th October, and a total of 176 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Cors Caron in 2014, and includes individual sites scores on key visitor measures. Throughout the report, where relevant, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites).

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 Cors Caron. 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 Cors Caron was slightly different to that of all Wales average: more were older or Welsh speaking, while fewer were working or had children living in the household.

The gender profile was very even, with 52% of visitors being male, and 48% being female. This was virtually identical to the all Wales figures (53% male and 47% female).

As mentioned, Cors Caron visitors tended to be older than all Wales visitors: 30% at Cors Caron were under 45 and 70% were 45 and over, which includes 28% who were aged 65 and over. Across Wales on average, 42% were aged under 45 and 57% were aged 45+.

The profile for working status of visitors to Cors Caron mirrors the age profile, with more than average being retired (34% vs.19%) and consequently less working full time. However, visitors to Cors Caron were still more likely to be working full time (44%) than any other working option. Across Wales sites on average, 56% were working full time.

In line with the all Wales average, Cors Caron visitors tended more towards the ABC1 socio-economic groups (professional and non manual workers) 67%, than the C2DE groups (skilled and unskilled manual workers and the unemployed), 30%. Across all Wales sites 72% were ABC1 and 27% C2DE.

A quarter (25%) of Cors Caron visitors had children in the household, which was slightly lower than the all Wales figure (34%). This is no doubt related to the older profile of Cors Caron visitors.

The overwhelming majority of visitors to Cors Caron were White British / Welsh / Irish (96%), with very few describing their ethnicity as 'White other nationality' (3%) or 'Black / Asian / Mixed' (1%). This is identical to the all Wales average.

Almost a third of visitors to Cors Caron spoke Welsh (31%): 19% fluently and 12% non-fluently. This is much higher than the all Wales average of 22% Welsh speakers (11% fluent, 11% non-fluent).

Table 2: Profile of visitors by key demographics 2014

		Cors Caron %	All Wales %
Gender	Male	52	53
	Female	48	47
Age	16 – 24	4	3
	25 – 34	6	16
	35 – 44	20	23
	45 – 54	18	23
	55 – 64	24	17
	65+	28	17
	Refused	1	<1
Social class	AB	33	38
	C1	34	34
	C2	16	15
	DE	14	12
	Refused	3	1
Working status	Full-time employee (30+ hours per week)	44	56
	Part-time employee (<30 hours per week)	12	10
	Self-employed	3	7
	Full-time education	2	1
	Unemployed	1	1
	Permanently sick / disabled	2	2
	Retired	34	19
	Looking after home	2	2
	Other	1	<1
	Refused	-	1
Limiting illness	Yes – limited a lot	4	4
	Yes – limited a little	9	5
	No	87	90
	Refused	-	1
Children in household	Yes	25	34
	No	75	66
	Refused	-	<1
Ethnicity	White – British / Welsh / Irish	96	96
	White – Other	3	3
	Black / Asian / Mixed	1	1
	Refused	-	<1
Welsh speaker	Yes	31	22
	No	69	78

Base: All visitors – Cors Caron (176); All Wales (1,154)

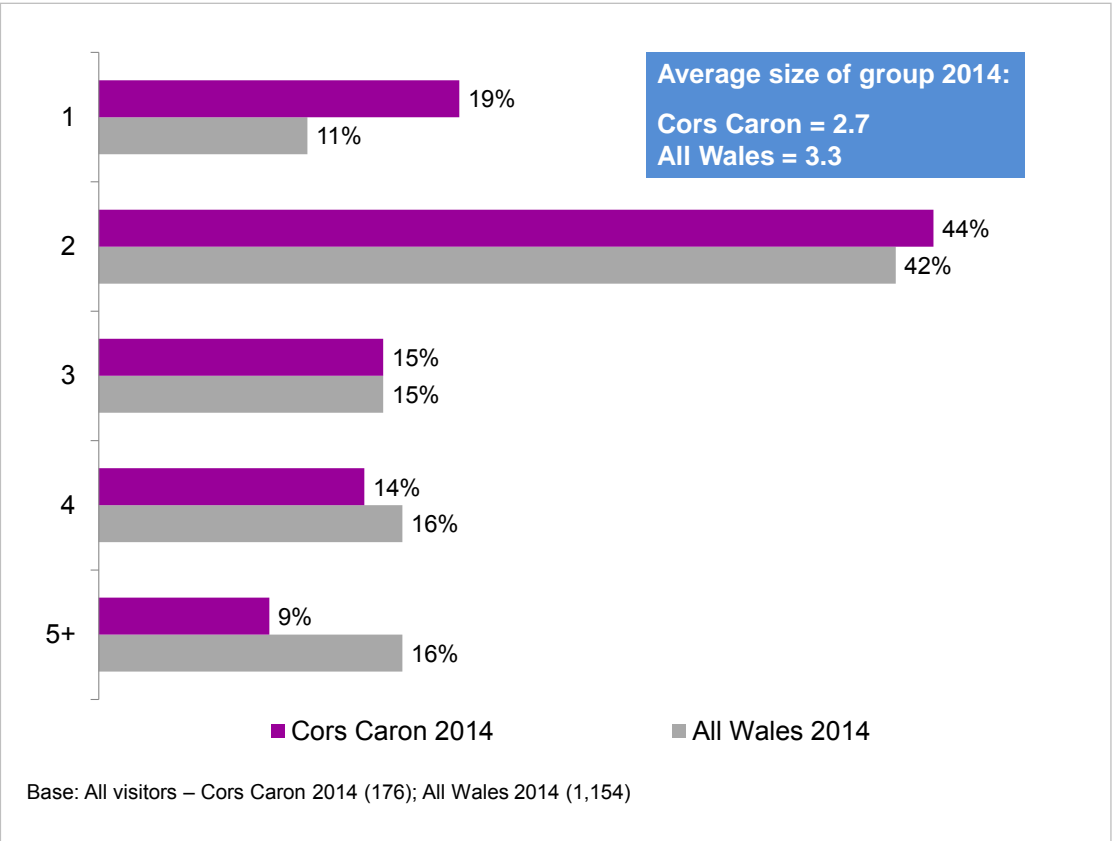
3.2 Group profile

3.2.1 Size of group

Group sizes were slightly smaller at Cors Caron (averaging 2.7 people), compared with the all Wales average (3.3 people).

The most common group size was 2 people (44%), whilst 19% of Cors Caron visitors visited alone. Three in ten visitors groups comprised of 3-4 people (29% vs. 30% all Wales), while only 9% visited in a group of 5 or more, compared with 16% across Wales on average.

Figure 1: Q1. Total size of the group

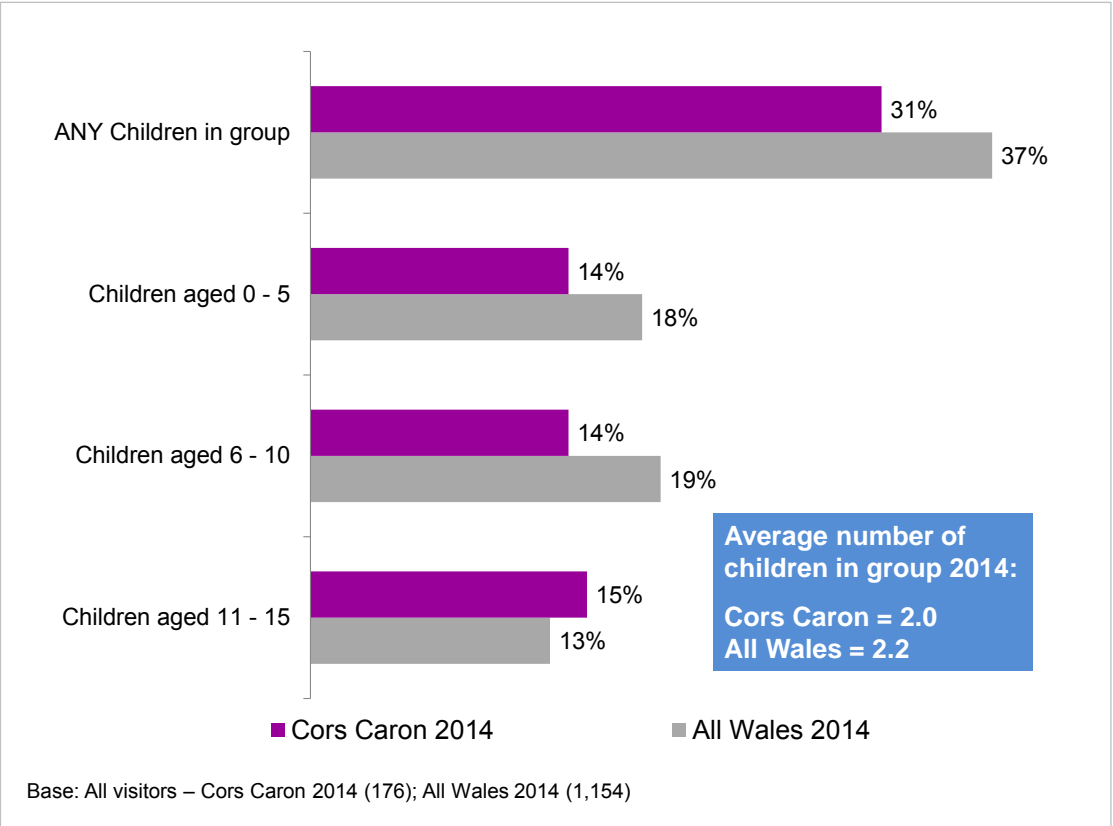


3.2.2 Composition of group

Almost a third of visitors had children in their group (31%), which is slightly lower than the all Wales average (37%). The age profile of the children visiting was very evenly split between the age ranges, whereas across Wales in general, the sites were slightly more likely to attract younger children (0-10 years) rather than older (11-15 years) - see Figure 2 below.

On average, there were 2 children in each group, similar to the all Wales average of 2.2.

Figure 2: Q1. Composition of group



4. Profile of visit

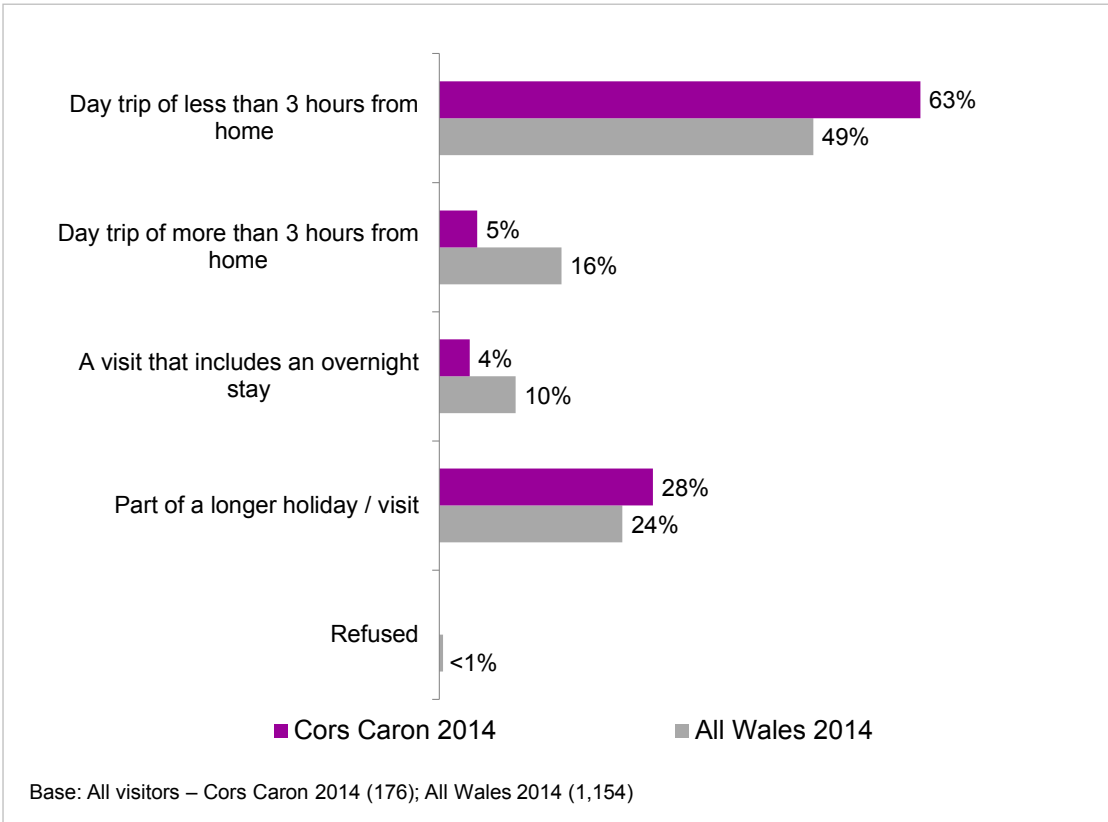
4.1 Type of visit

Two thirds of Cors Caron visitors (68%) were on a day trip whilst a third (32%) were staying away from home. This is very similar to the all Wales profile of 65% day trippers and 34% staying visitors. There were some differences in type of day trip being taken, with the majority of Cors Caron visitors being on a short trip of less than 3 hours from home (63%), whereas across Wales, less than half of visitors were on this type of trip (49%).

Just 5% had travelled for more than 3 hours for their day trip to Cors Caron compared with 16% across all Wales sites.

Over a quarter of visitors were visiting Cors Caron as part of a longer holiday in the area (28%) which is similar to the all Wales average (24%).

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.

Seven in ten visitors to Cors Caron came from within Wales (70%) with the majority coming from Mid/West Wales (58%). Of the non-Wales based visitors, 27% came from England, 1% came from elsewhere in the UK and 2% came from abroad.

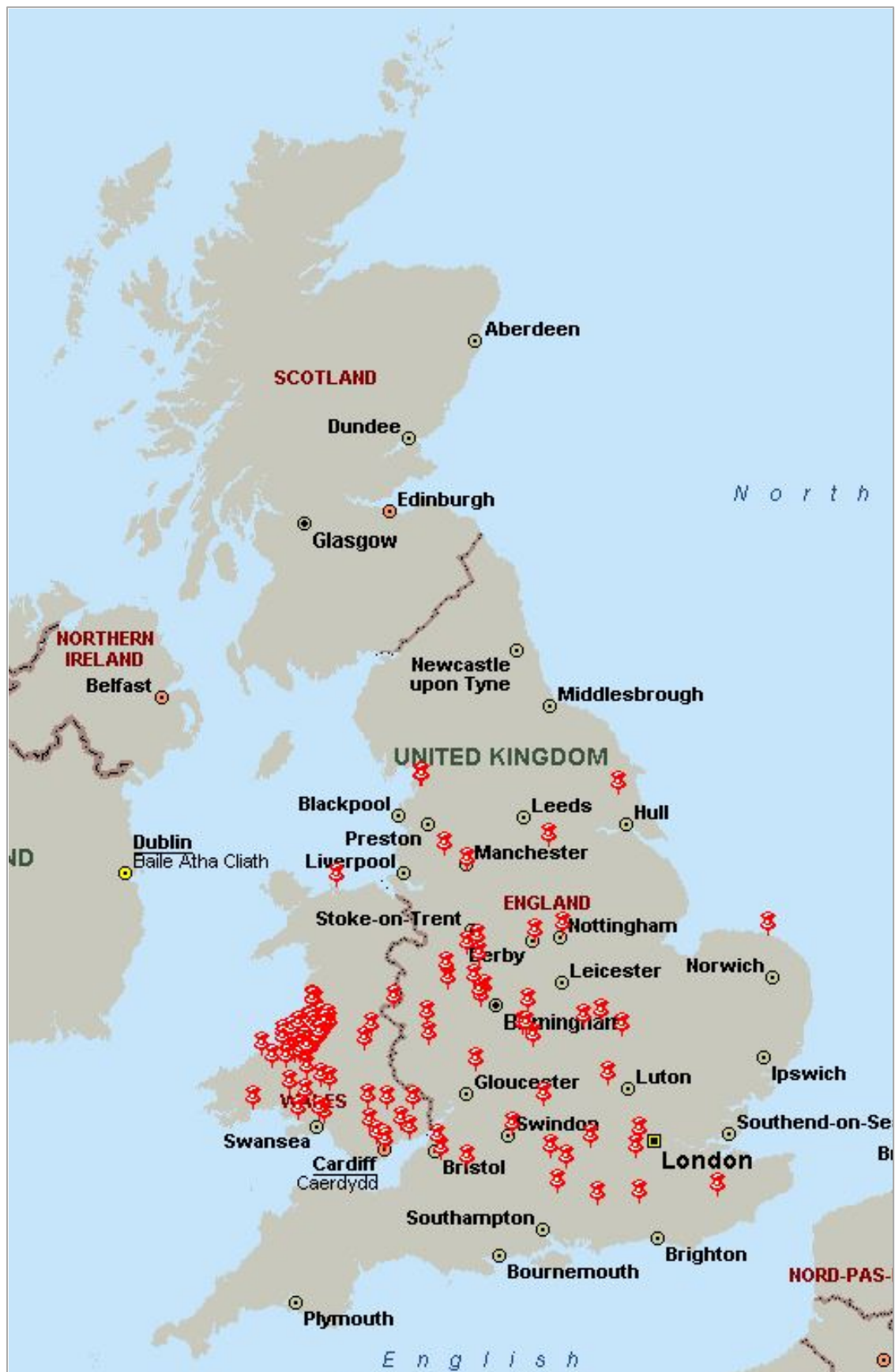
Across all Wales sites, 60% of visitors travelled from within Wales, 38% from England and just 2% from the rest of the UK or abroad. Table 3 below and Figure 4 overleaf provide more details:

Table 3: Q28b. Visitor origin 2014

		Cors Caron	All Wales
		%	%
Home region	North Wales	1	20
	Mid / West Wales	58	21
	South West Wales	7	5
	Valleys	3	10
	South East Wales	2	5
	Outside of Wales	30	40
Home nation	Wales	70	60
	England	27	38
	Rest of UK	1	<1
	Abroad	2	2
	Refused	-	<1

Base: All visitors – Cors Caron (176); All Wales (1,154)

Figure 4: Map of visitor origin for Cors Caron



4.3 Frequency of visits

4.3.1 First-time visitors

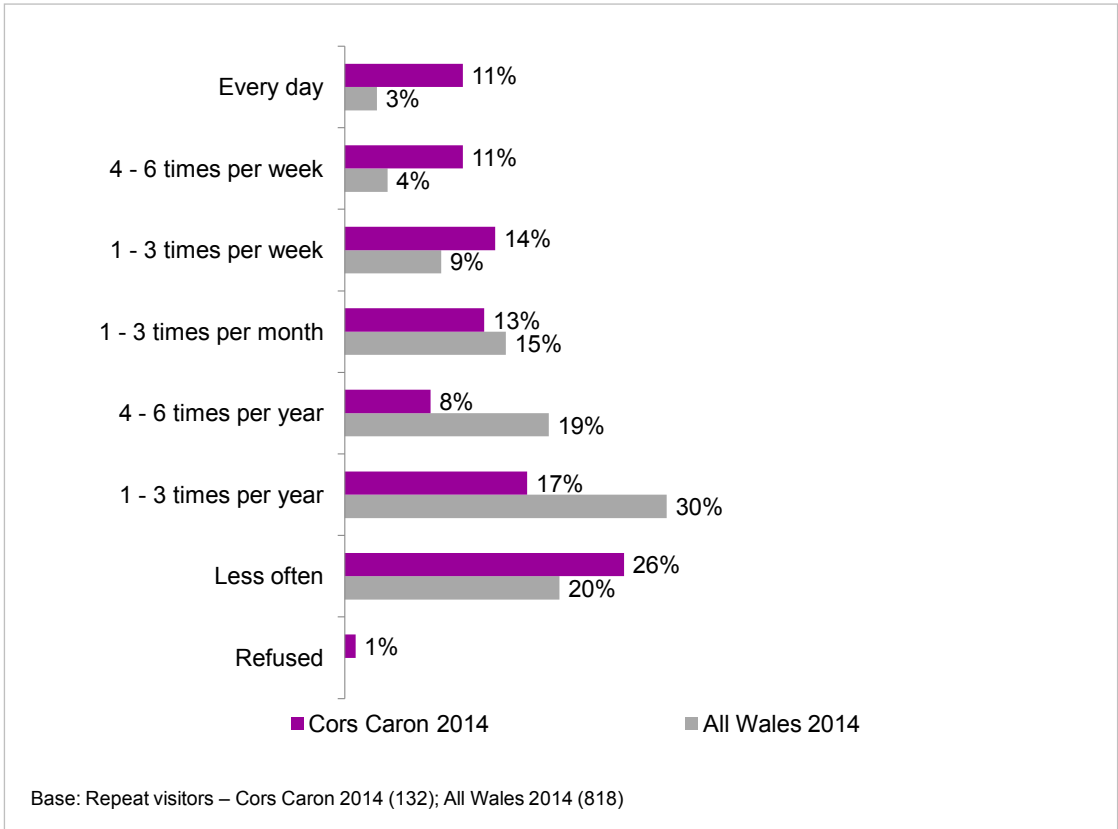
A quarter of visitors to Cors Caron were first-time visitors (25%) meaning three quarters (75%) had visited before. This is in line with the all Wales average of 29% first time visitors and 71% repeat visitors.

4.3.2 Repeat visitors

Focussing on repeat visitors (75% of the sample), almost half visit at least once a month (49%) which includes 36% who visit at least weekly. This suggests that Cors Caron visitors are more frequent than seen across Wales on average, where 31% visit monthly or more often. This is particularly true for daily visits which were almost four times as likely at Cors Caron, than the all Wales average (11% vs. 3%).

51% of Cors Caron visitors would be classified as infrequent, visiting 4-6 times a year or less often, which compares to an all Wales average of 69% infrequent visitors.

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



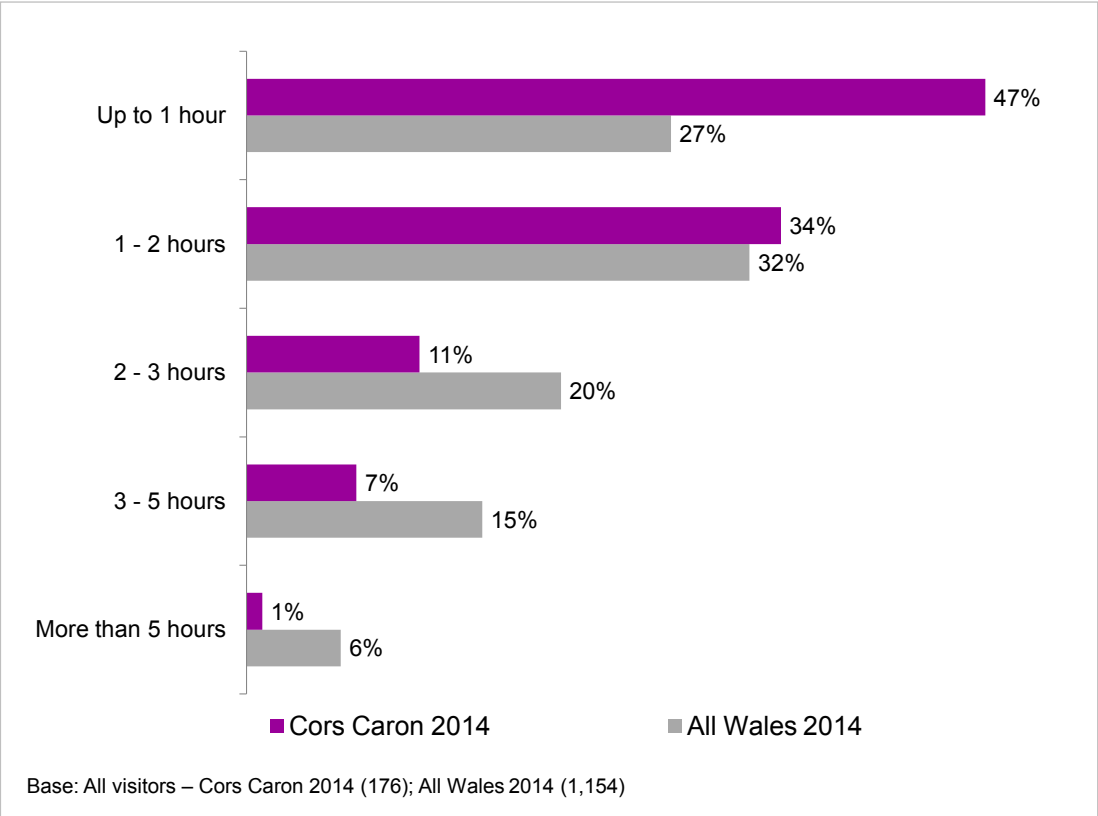
4.4 Length of visit

Visitors to Cors Caron were at the site an average of 1 hour and 26 minutes. Across Wales, the average visit length was somewhat longer at 2 hours and 7 minutes.

The approximate amount of time spent at the site compared with the all Wales averages are shown in Figure 6 below.

Visitors to Cors Caron were much more likely to spend just an hour or less at the site than average (47% vs. 27%) whilst the proportion visiting for more than 2 hours was less than half the all Wales average (19% vs. 41%).

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



There were some differences in visit length by sub group, with visitors with children, particularly older children, staying visitors and first time visitors spending longer than average at Cors Caron:

- Visiting with children: 1 hour 41 mins, adult only: 1 hour 19 mins
- Visiting with children aged 11 – 15: 1 hour 53 mins
- Staying Visitor: 1 hour 53 mins, day tripper: 1 hour 13 mins
- First time Visitor: 1 hour 47 mins, repeat visitor: 1 hour 19 mins

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 Cors Caron was walking generally (88%), which was somewhat more popular at Cors Caron than the all Wales average (69%). Conversely, cycling was less popular at the site, with only 14% taking part in this, compared with 22% across all Wales.

Most visitors to Cors Caron enjoyed walking on signposted trails (56%) as opposed to followed independent routes (10%). A further third enjoyed dog walking (35%).

Other popular activities at Cors Caron included bird watching, which was twice as popular as the all Wales average (31% vs. 15%) and admiring the views generally (at 26% this was the same as all Wales).

Slightly more than average enjoyed photography at Cors Caron (19% vs. 11%) and 13% had taken part in a natural history visit (7% across all Wales).

Just under one in ten (9%) had had a picnic or BBQ at Cors Caron, somewhat fewer than across Wales in general (17%).

Table 4 overleaf details all the responses given and shows that overall, the vast majority of visitors took part in 'active' activities (95%) which is slightly higher than the all Wales figure (87%):

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

	Cors Caron 2014 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	10	15
Cycling off trails or tracks	4	11
TOTAL CYCLING	14	22
Walking on a sign-posted trail	56	42
Walking but not following sign-posts	10	12
Dog walking	35	30
TOTAL WALKING	88	69
Bird watching	31	15
Admiring the views	26	26
Photography	19	11
Nature / natural history visit	13	7
Picnic or barbeque	9	17
Running / jogging	3	3
Seeing something in the forest	1	2
Orienteering / Geocaching	1	<1
Organised trip / event	1	2
Looking for wildlife / plants / animals	1	1
Fishing	1	1
Other	1	2
Taken part in ACTIVE activities	95	87

Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

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

4.6 Length of time spent on activities

Those visitors who had taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking cycling activities (15), this has not been commented on.

As previously mentioned, visits to Cors Caron lasted an average of 1 hour and 26 minutes. The majority of this time was spent walking, with an average walking duration of 1 hour and 8 minutes.

Table 5: Q5/Q6. Time spent taking part in walking at Cors Caron

	Total duration of visit	Total time spent walking
Up to 30 minutes	15	19
31 – 60 minutes	31	38
1 – 2 hours	34	32
2 – 3 hours	11	5
3 – 5 hours	7	4
5+ hours	1	-
Don't know	-	2
AVERAGE	1 hr 26 mins	1hr 8 mins

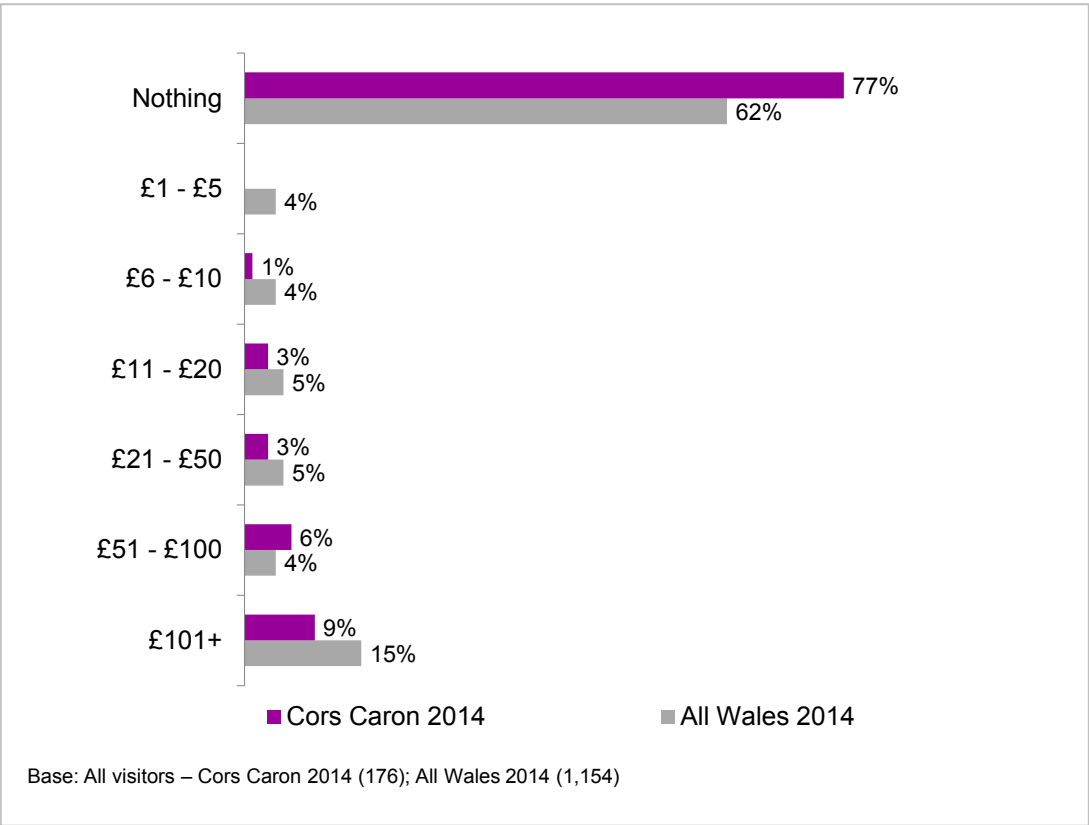
Base: All respondents - 2014 (176); respondents who walked (154)

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

Visitors to Cors Caron were asked how much they planned to spend at the site during their visit on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. However, no-one at Cors Caron planned to spend any money at all on their visit. Typically, a little over half of visitors across Wales plan to spend something at each site (53%) with an average spend of £11.15 per visitor.

Visitors to Cors Caron 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 7 shows the figures calculated by combining the data across all types of spending:

Figure 7: Q18b. Average spend per person/group in local area – frequency of spending within each price range



Spending in the area as a result of the visit followed a similar pattern to the all Wales average, with most visitors saying they did not plan to spend any money in the local area (77% Cors Caron; 62% all Wales) and least planning on spending over £101 (9% Cors Caron, 15% all Wales). Overall, the average spend in the area as a result of visiting Cors Caron was £52.87, somewhat lower than the all Wales average of £84.86, but a not dissimilar amount.

When looking at individual types of spending in the area, food and drink, transport and accommodation were mentioned by the highest proportion of visitors (18%, 16% and 9% respectively) – see Table 6 below.

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.

One in five (18%) of Cors Caron visitors said they would spend on food and drink, with an average spend of £11.92 (£26.37 all Wales) and 16% would spend on transport, with an average spend of £11.56 (£9.83 all Wales).

The highest planned spend was, not surprisingly, on accommodation, which visitors would spend an average of £32.87 on. Overall, 9% of visitors said they planned to spend on accommodation in the area. This is lower than the all Wales average of 15%, with an intended spend of £50.24, and relates back to the higher than average proportion of day visitors to the site (as opposed to staying visitors).

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

	% spending anything on items		Average spend on items £	
	Cors Caron %	All Wales %	Cors Caron £	All Wales £
Food and drink	18	27	£11.92	£26.37
Transport	16	20	£11.56	£9.83
Accommodation	9	15	£32.87	£50.24
Souvenirs / gifts	6	7	£1.25	£2.68
Admissions to other attractions	3	5	£1.80	£4.97
Parking	3	10	£0.37	£1.56
Hiring equipment	-	1	-	£0.20
Anything else	1	3	£0.96	£2.37

Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

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

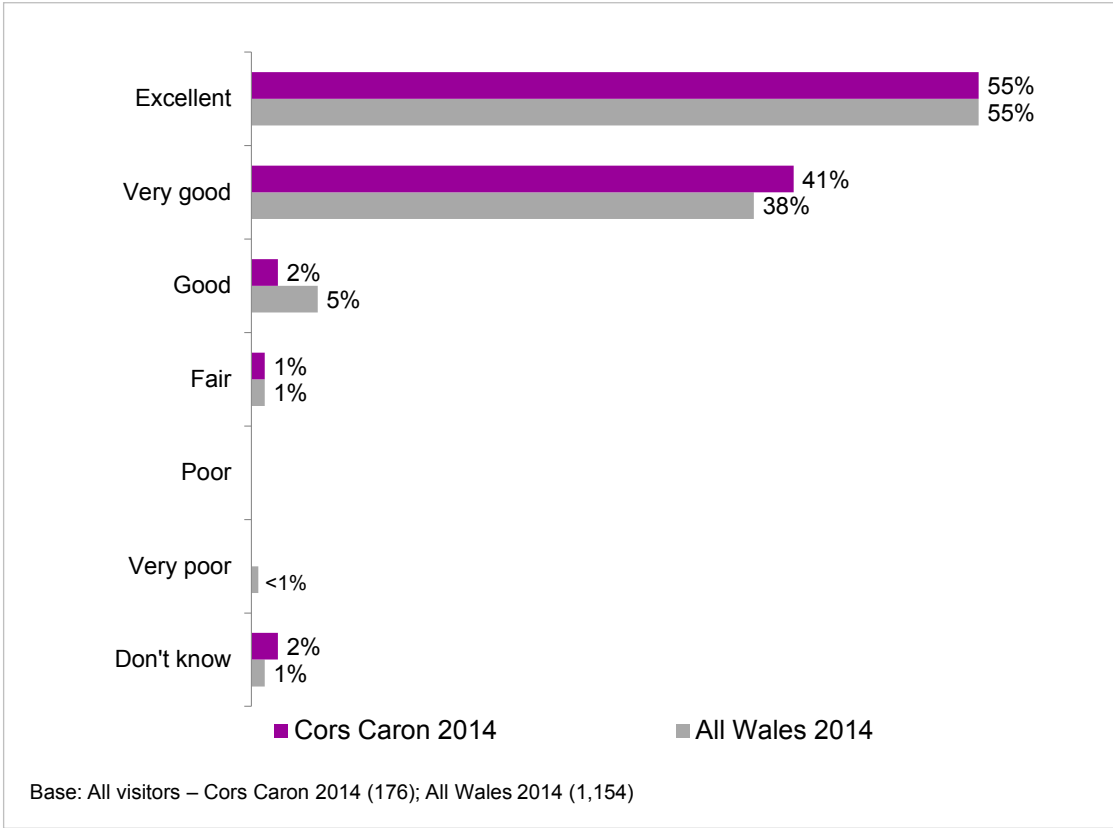
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Cors Caron as a place to visit were very positive. This was also true across all Wales sites. Nobody interviewed at Cors Caron gave a negative rating of the site and just 1% said it was 'fair', meaning that 98% in total were positive about their visit (the same as the all Wales average).

Over half (55%) rated Cors Caron as excellent and a further two fifths (41%) said it was very good, whilst 2% rated it as good.

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



Older visitors were much more likely to rate the site as excellent, with 63% of over 55s saying this, compared with 50% of 35-54s and 29% of 16-34s (NB small sample size for 16-34s, of 17).

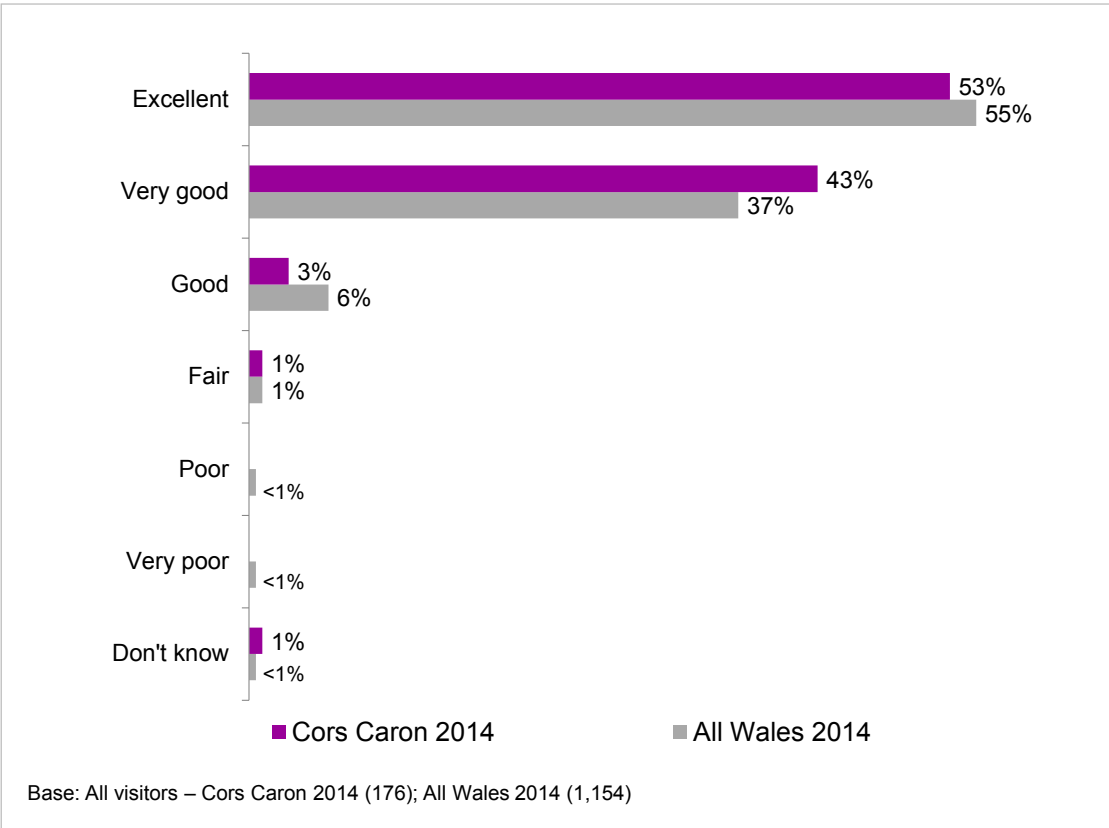
Day trippers were also more positive about the site than staying visitors (60% excellent, vs. 44%) as were repeat visitors (57% compared with 45% of first time visitors). Adult-only visitors were also more positive overall than those with children (61% vs. 41%).

5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming Cors Caron was were also very positive: this was also found across all Wales sites on average. Again, no-one at Cors Caron gave a negative rating and just 1% said it was fair, meaning that 99% were positive about the site’s safe and welcoming feel. Again this is in line with the all Wales finding (98%).

Over half the visitors gave this measure an ‘excellent’ rating (53%) and a further two fifths said it was very good (43%) whilst 3% said it was good.

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



There were less marked sub group differences for how safe and welcoming the site compared to the overall rating. Saying that, day trippers and repeat visitors were still slightly more likely than average to say Cors Caron was excellent on this measure. Adult-only visitors were, however, slightly less positive than those visiting with children:

Percentage rating the site as excellent for being safe and welcoming:

- Day trippers: 57%, staying visitor: 44%
- Repeat visitor: 56%, first time visitor: 43%
- With children: 59%, adult-only: 50%

Visitors were then asked why they had given 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 Cors Caron and all Wales sites.

The scenery / views / beautiful environment were mentioned by most visitors (51%), whilst two fifths said that Cors Caron was peaceful, pleasant, tranquil and relaxing (42%):

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

	Cors Caron 2014 %	All Wales 2014 %
The scenery / views / beautiful environment	51	41
Peaceful / pleasant / tranquil / relaxing / welcoming	42	32
Fresh air / open space / plenty of space / freedom	29	22
Safe environment generally for all people	25	28
Good provision of paths / trails and tracks	21	16
Clean / tidy / well maintained / litter free	16	17
Good, safe place for the kids to play / run around	11	15
Good quality facilities / amenities	11	14
Well signposted / good maps / info boards	10	16
Live locally / convenient / easy to get to / close	10	8
Good car parking	8	5
Well laid out / well organised / good set-up	5	14
Other visitors are friendly	5	6
Dog friendly	5	2
Good toilets / plenty of toilets	4	1
Away from roads / no cars / cars drive slowly	3	2
Easily accessible for wheelchairs / pushchairs	3	1
Not too crowded / busy	2	1
General positive comments	3	2
Some negative comments	4	3

Base: Visitors rating the site as excellent, very good or good – Cors Caron 2014 (174); All Wales 2014 (1,137)

Over a quarter (29%) said they enjoyed the fresh air and open space, and a similar proportion (25%) said the site was a safe environment generally.

Over a fifth mentioned the good paths, trails and tracks (21%) and 16% commented that it was clean and tidy, litter free. Around one in ten mentioned it was a safe place for the kids to run around, there were good quality facilities there, it was well signposted or that it was convenient to get to.

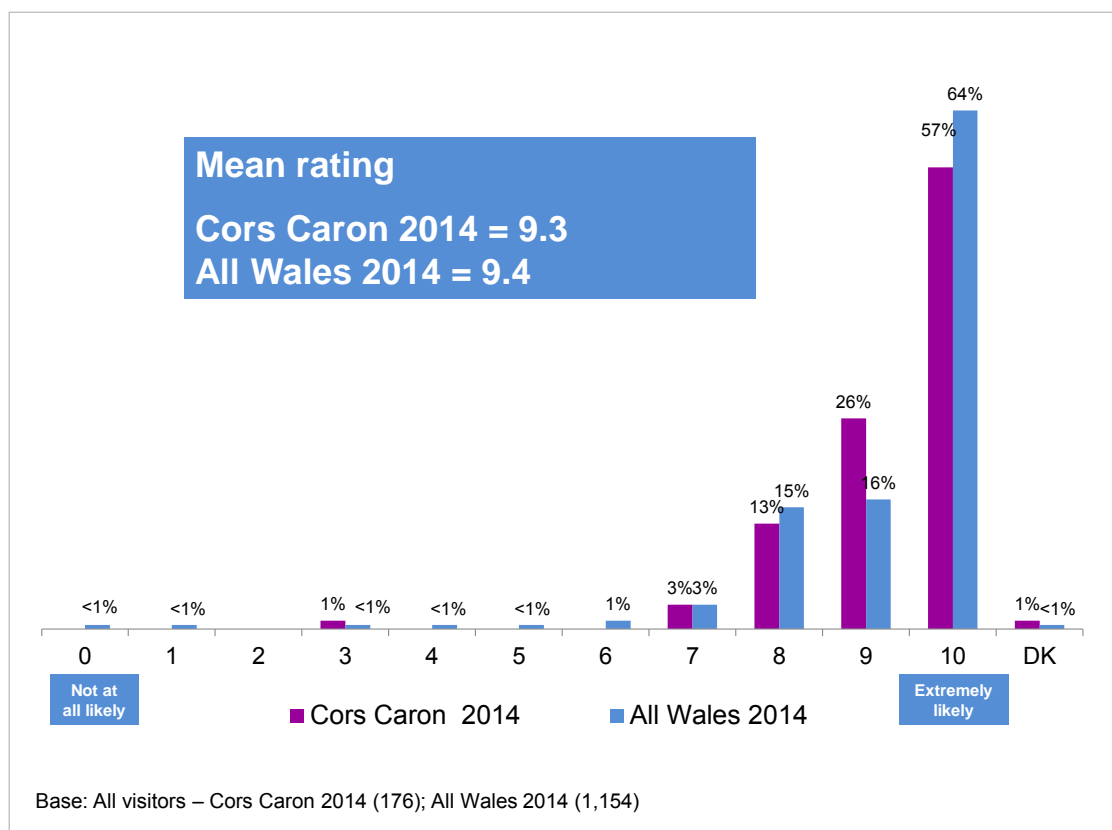
The answers given were broadly in line with the all Wales responses, with slightly more at Cors Caron complimenting the scenery (51% vs. 41%) and peacefulness (42% vs. 32%), whilst slightly fewer were impressed with the lay out and organisation (5% vs. 14%).

5.3. Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Cors Caron 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'.

Over half (57%) gave a rating of 10 out of 10 at Cors Caron, slightly fewer than the all Wales average (64%). However, as visitors to the site were more likely than average to give a score of 9 out of 10 (26% vs. 16%) rather than any negative score, the overall recommendation rating is very similar to all Wales with a score of 9.3 at Cors Caron, and 9.4 for all Wales:

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 Cors Caron is 82, which is slightly higher than the all Wales score of 78.

5.4 Favourite things about the site

Visitors 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 overleaf.

One main aspect of Cors Caron stood out which was the peace, tranquillity and relaxation they experienced there (63%). Other popular features of the site, as mentioned by over a third of visitors each (36%), were the bird watching, the scenery and beautiful environment and the walks, paths and trails.

Other mentions included the fresh air (15%), good accessibility (12%) keeping fit (11%) and the fact it was close to home (11%). Table 8 overleaf gives full details:

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

Activities	Cors Caron 2014 %	All Wales 2014 %
Peace / tranquillity / relaxation / atmosphere	63	49
Wildlife / bird watching	36	18
Scenery / views / beautiful / natural	36	47
Walks / paths / trails	36	34
Fresh air / being outside	15	17
Good accessibility	12	4
Exercise / keeping fit	11	7
Close to home / convenient location	11	12
Safe environment	9	10
Like forests / trees / variety of trees and plants	9	10
Cycle trails / freedom / opportunity to cycle	8	16
Clean / well looked after	7	9
Ideal for dogs / dog friendly / safe for dogs	6	4
Not crowded / not too many people	6	3
Been before / wanted to come again	6	6
Plenty / cheap / good parking	6	4
Remote / away from traffic / no cars	5	1
Good on-site facilities / BBQ areas / shop	5	16
Good toilets	4	1
Activities that are good for the children	3	9
Open space / plenty of space	2	1
Challenging environment / wilderness	2	1
Lots to see and do	2	3
Something different / a change	2	1

Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

Other favourite things mentioned by small numbers of visitors included:

- The weather
- Well signposted / good maps
- Helpful / pleasant staff
- Rivers / creeks / waterways
- Friendly people.

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.

Just over a third (36%) of visitors to Cors Caron could not think of anything that would add to their enjoyment and only made positive comments, which was somewhat lower than the average across Wales (46%).

Just under two thirds of visitors to Cors Caron improvements to the site (62%), and Table 9 overleaf outlines the comments that were made by 2% or more. Most comments related to dog poo at the site (22%) – these visitors asked for more dog poo bins at the site.

The second most often mentioned potential improvement was the provision of a cafe or other catering facilities at the site (14%). Roughly one in ten visitors suggested better signage and maps (8%), more litter bins (7%) and more information on wildlife, vegetation or the area (6%):

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

- Better parking
- More sheltered areas
- Drinking water taps
- Bike shop.

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

	Cors Caron 2014 %	All Wales 2014 %
Nothing / general positive comments	36	46
More dog poo bins / remove dog poo	22	7
Provide / improve café / catering / refreshments	14	5
Improve signage / more maps / better maps	8	6
More bins / litter bins / recycling bins / less litter	7	4
More information on wildlife / vegetation / area	6	2
Better access / make more accessible (for disabled people)	5	2
Longer, more challenging trails, paths and cycle routes	4	2
More trails / paths / cycle tracks	3	4
Improve maintenance of paths / cycle trails / better surfacing	3	3
Improve toilets / more toilets / shower facilities / changing area	2	6
More seating	2	3
More activities for children / more play areas	2	4
More picnic areas / BBQ / picnic tables and benches	2	3
More wildlife / birds	2	1
Better weather / more sunshine	2	2

Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

When asked if there was anything that *interfered* with their enjoyment of the site, around half said nothing had (56%) - this was considerably lower than the all Wales average of 70%. For two in five visitors (40%), some negative factor had impacted on their enjoyment of their visit, and for 19% of visitors this was dog mess on the paths or play area (considerably higher than the 4% all Wales average).

A further 3% said more dog poo bins were needed, and the same proportion were upset by dogs being off leads or around the site generally.

7% complained that there were not enough litter bins or too much litter at the site, again higher than the all Wales average of 2%.

See Table 10 below for comments made by 2% of the sample or more:

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

	Cors Caron 2014 %	All Wales 2014 %
Nothing	56	70
Dog mess on paths / play area	19	4
Need more letter bins / recycling bins / too much litter	7	2
Wet / raining / windy (poor weather)	7	8
Problems getting around the site (trails closed, no disabled access)	5	2
Signs unclear / need better signs / more maps	3	3
Need more dog poo bins	3	1
Dogs off leads / loose dogs / don't want dogs around	3	1
Issues with toilets (not enough, closed, dirty etc.)	2	2

Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

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

- Problems with car parks
- Poor maintenance of the site
- Complaints about other visitors
- Too many children running around
- Too many cyclists
- Need more seating.

6. Site facilities

6.1 Importance of site facilities

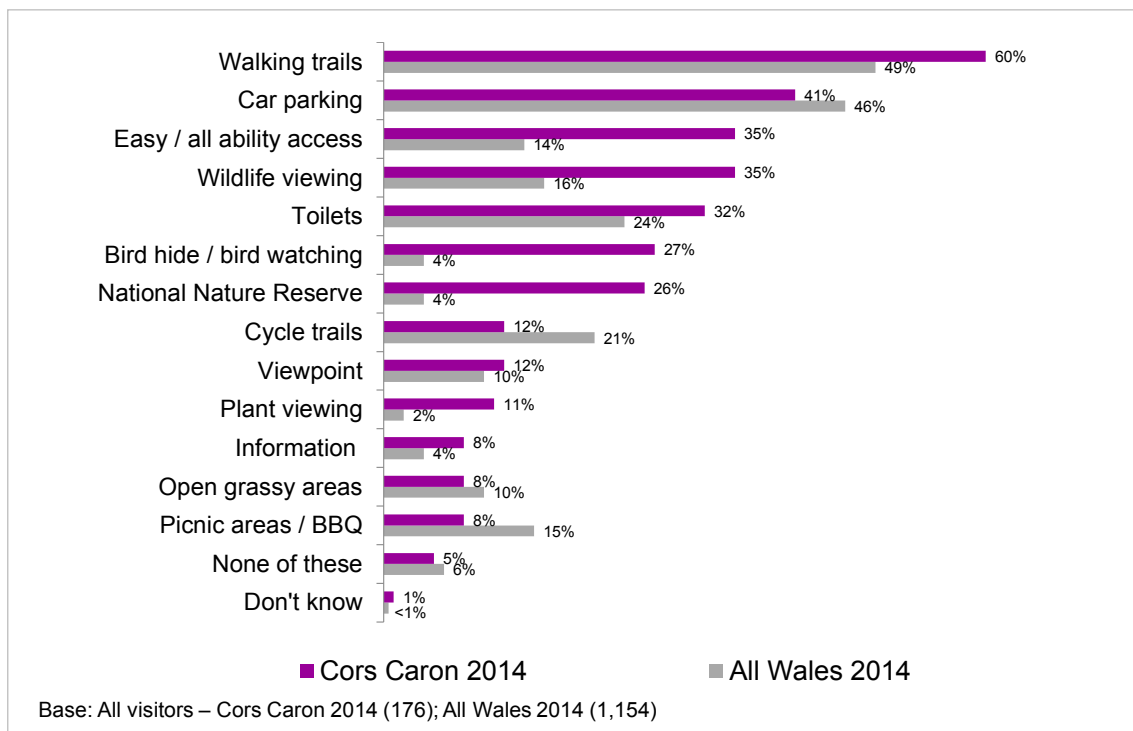
Visitors were presented with a list of facilities available at Cors Caron and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

Walking trails were mentioned by the highest proportion of visitors to Cors Caron (60%) which is somewhat higher than the all Wales average (49%). Parking was the second strongest draw to visit, and at 41% this is in line with the all Wales average (46%).

Many of the other most often mentioned reasons to visit were quite unlike the average for Wales, demonstrating the unique nature of Cors Caron: for example, considerably higher than average proportions of visitors to Cors Caron mentioned easy / all ability access (35%), wildlife viewing (35%) and bird watching. Cors Caron was the only National Nature Reserve included in the 2014 research, explaining the higher than average proportion to mentions (26% vs. 4% all Wales).

While 12% mentioned cycle trails, this was of much less importance to visitors to Cors Caron compared to all Wales sites (21%). A third also mentioned the toilet facilities as a reason to visit, which was more similar to the all Wales average (32% vs. 24%) – see Figure 12 below.

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



Certain other factors (apart from site facilities) were important to around a quarter of visitors (28%) 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 in Table 11 below.

A total of 6% of visitors said they came to Cors Caron because the site is dog friendly. Other reasons included that it is local / close to home (5%) and that children can run around and play there (3%).

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

	Cors Caron 2014 %	All Wales 2014 %
Nothing	72	60
Dog friendly / dogs can come off leads / dog facilities	6	5
Close to home / local / convenient	5	7
Good for the children / can run around and play	3	4
Relaxing / peaceful / tranquil / quiet	2	3
Wanted to go walking / cycling	2	3
Beautiful scenery / views / natural beauty	2	2
Easily accessible / easy to get around	2	1
Good parking / cheap / free	2	1

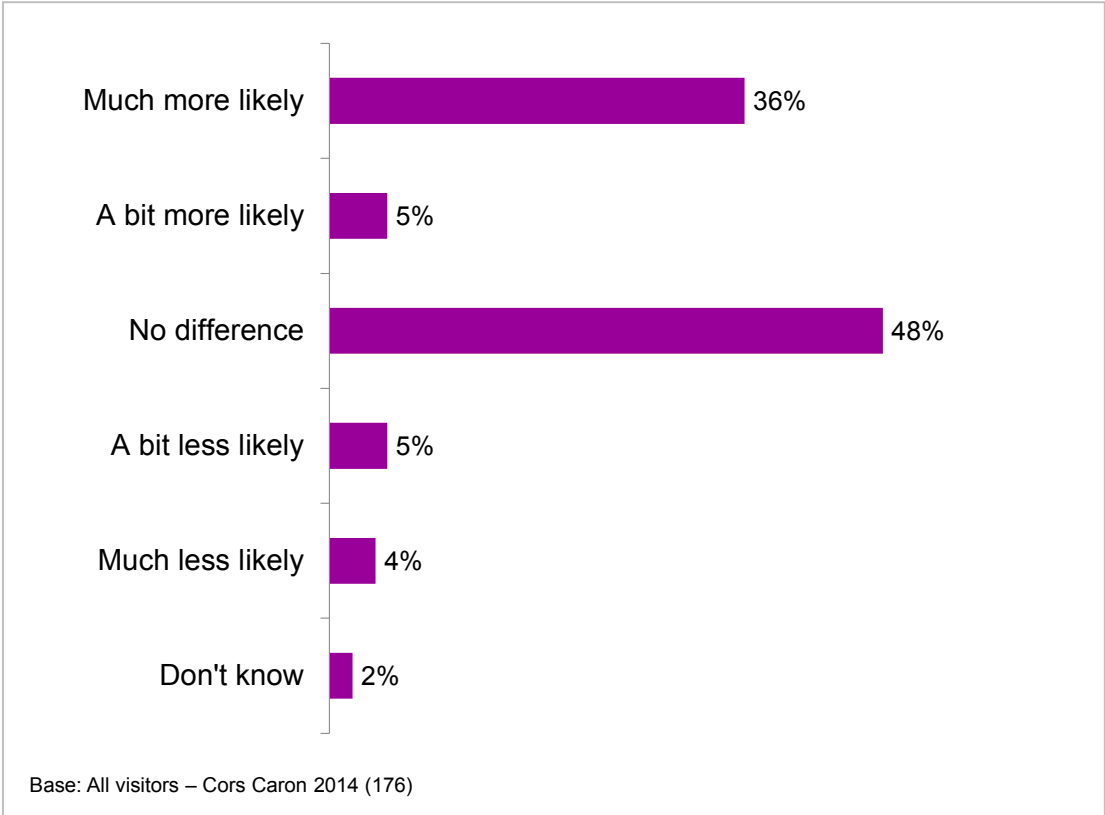
Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

6.2 Factors affecting the likelihood of revisiting

Visitors to Cors Caron were also asked two site-specific questions relating to factors affecting their likelihood of revisiting the site. Firstly, cyclists were asked if they would be more likely to use the cycle trail there if it ran as an off road route all the way to Tregaron. Over three quarters said this would be more likely to make them use the track, with most (68%) saying they would be 'a lot' more likely. Please note, however, that this question was only asked of a small number of cycling visitors (25), so these findings should be treated as indicative only.

Secondly, Cors Caron visitors were asked if the fact the site was dog friendly made them any more likely to visit in the future. Four in ten said it did make them more likely to visit (41%), whilst almost half (48%) said it made no difference. Interestingly, almost one in ten were *less* likely to visit as a result – see Figure 12b below.

Figure 12b: Q20b. Effect of being dog friendly on likelihood of revisiting



Amongst dog walkers, 98% said that the fact that Cors Caron was dog friendly made them more likely to visit in future (95% saying 'very likely').

6.3 Facilities used

Visitors were then presented with the same list of facilities as at Section 6.1, and asked which they had used during their visit.

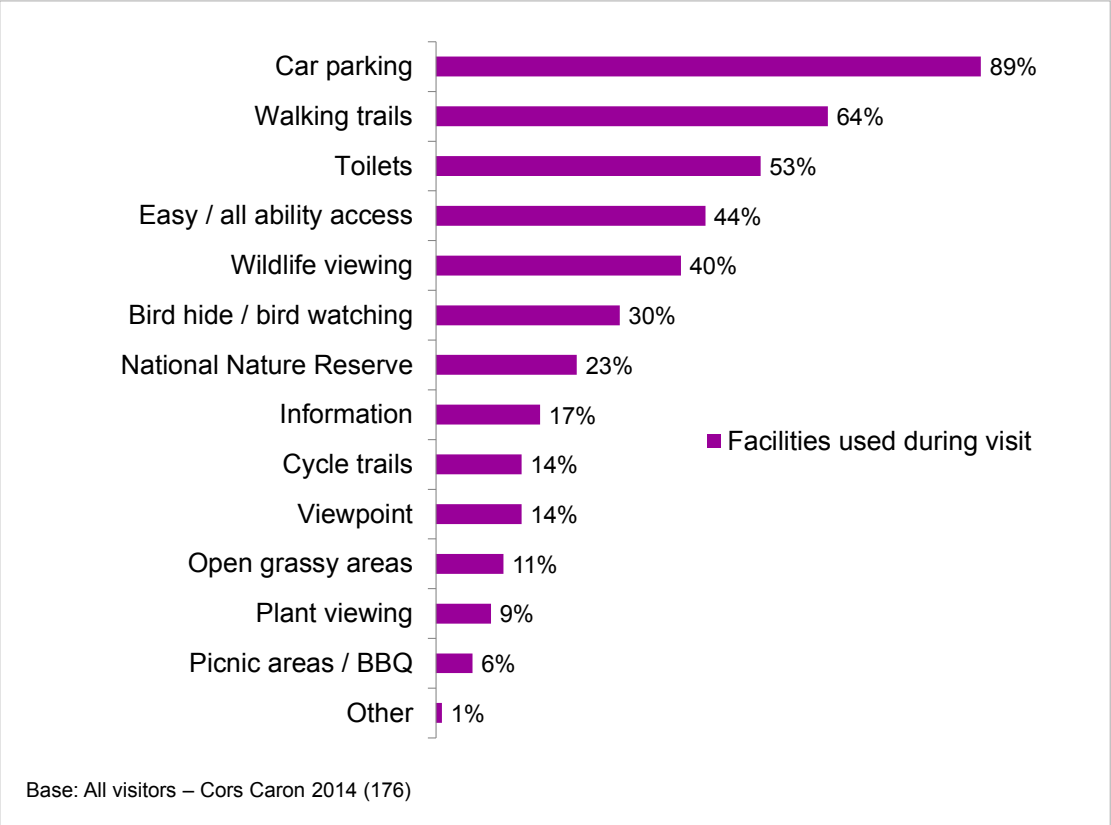
The facilities used reflect to a large extent, visitors' views of the importance of facilities. Parking was used by the highest proportion of visitors (89%), followed by walking trails (64%).

The toilet facilities were used by over half of visitors (53%) whilst the easy / all ability access was mentioned by 44%.

Four in ten had experienced wildlife viewing generally at Cors Caron (40%) and three in ten had taken part in bird watching / used a bird hide (30%). Around a quarter mentioned using the National Nature Reserve (23%).

See Figure 13 below for full details of facilities used:

Figure 13: Q15a. Facilities used at Cors Caron 2014



6.4 Rating of site facilities

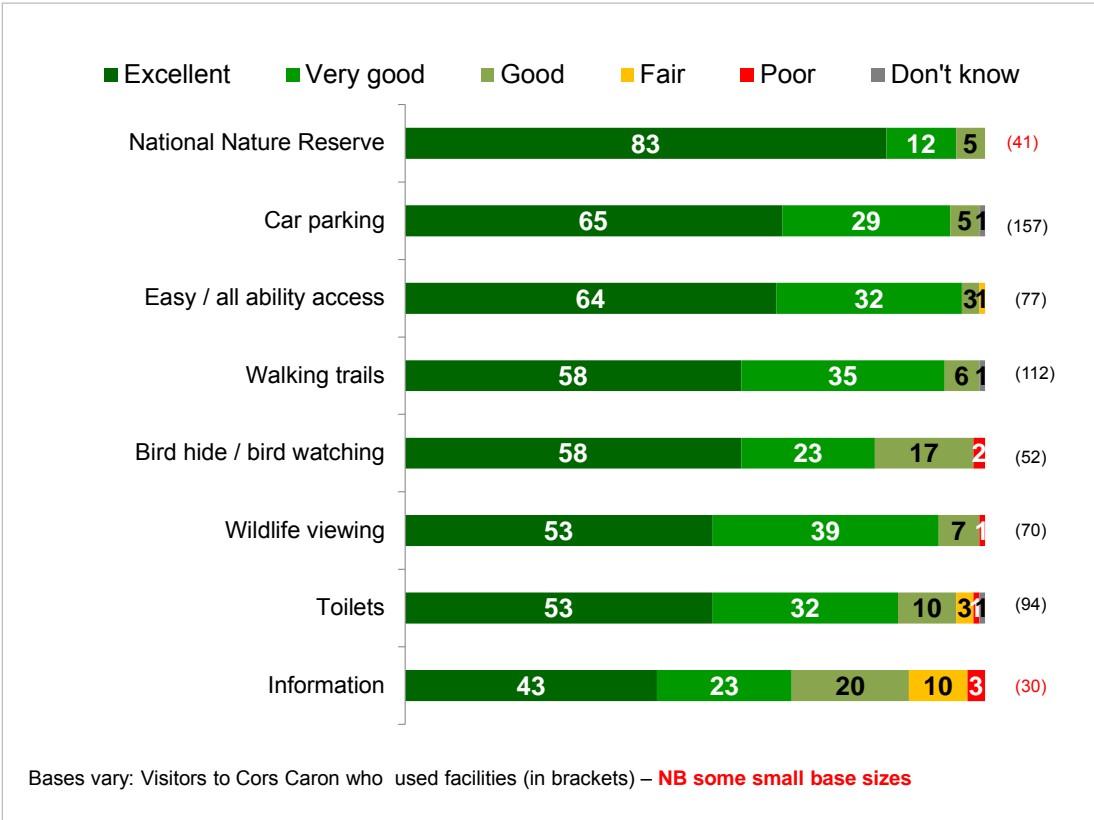
Visitors were then asked to rate the facilities they had used. Ratings for facilities used by 30 or more visitors have been detailed in Figure 14 below. Most visitors were extremely positive, with very few negative ratings received; the vast majority rated each facility as either ‘excellent’, ‘very good’ or ‘good’.

The feature that received the highest score was the National Nature Reserve which 83% rated as excellent - this is one of the highest ratings seen across all facilities in Wales. Furthermore, the remaining visitors said it was very good or good, meaning overall 100% gave a positive rating here.

The car parking was also extremely well rated at Cors Caron, with 65% saying this was excellent; 99% were positive about this overall. Similarly, the easy / all ability access was well appreciated with an excellent rating of 64% (99% rating it positively overall).

The facility that received the least positive rating was the information at the site, but nevertheless 43% said this was excellent and the same proportion said it was very good/good. One in ten (10%) rated the information as fair and a further 3% said it was poor. Figure 12 below shows the ratings given for each facility used by 30 or more visitors.

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



7. Sources of information used to plan visit

Visitors were asked where they found out about Cors Caron 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.

Over half of visitors said they had always known about the site (52%); as would be expected, this was much higher amongst repeat visitors (61%) than first-time visitors (25%). The main other ways of finding out about Cors Caron included word of mouth (16%), just passing by / en route to elsewhere (10%), Tourist Information Centre (6%) and via a leaflet (5%). See Table 12 below for more details:

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

	Cors Caron 2014 %	All Wales 2014 %
Always known about it / been here before	52	51
Word of mouth	16	20
Just passing / en route	10	13
Tourist Information Centre / Tourist Board	6	2
Leaflet	5	4
Google / other search engine	3	5
Newspaper	2	<1
Map	2	2
Other websites	2	2
Live locally	2	2
Book / guide book	2	1

Base: All visitors – Cors Caron 2014 (176); All Wales 2014 (1,154)

8. Visiting other areas and attractions

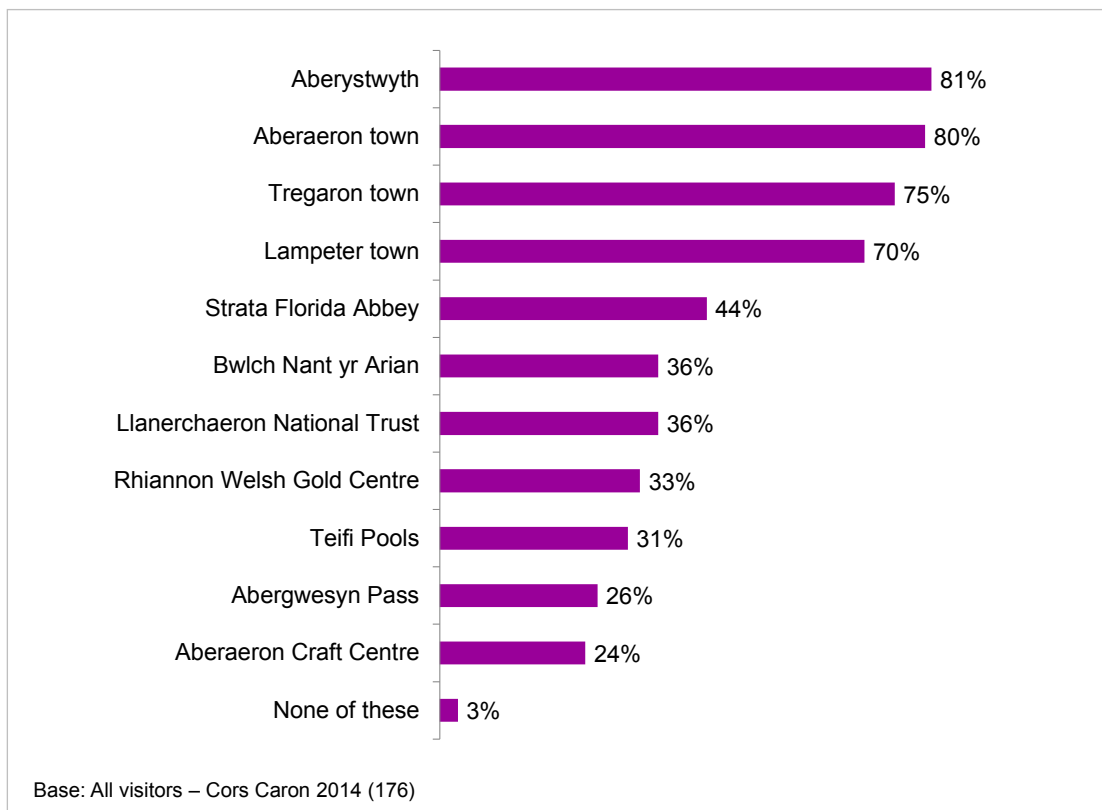
Visitors to Cors Caron were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months. Almost all visitors (97%) had visited at least one.

Aberystwyth and Aberaeron town were the most often visited local areas at 81% and 80% respectively, closely followed by Tregaron town (75%) and Lampeter (70%).

Around two fifths had visited Strata Florida Abbey (44%) whilst a third each had been to Bwlch Nant y Arian (36%), Llanerchaeron National Trust (36%), Rhiannon Welsh Gold Centre (33%) and Teifi Pools (31%). Around a quarter had been to Abergwesyn Pass (26%) and Aberaeron Craft Centre (24%).

As might be expected, day-trip visitors (who are more likely to be local to the area), were much more likely to have visited all these places than staying visitors, for example, 91% of day trippers had been to Aberystwyth in the past year, 88% had been to Aberaeron, 86% had been to Tregaron and 87% had been to Lampeter.

Figure 15: Q19. Other areas / attractions visited 2014



Appendix I

Questionnaire

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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