

Research Report

Quality of the Visitor
Experience 2015

Craig y Dinas



Prepared for:
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1. Executive summary

1.1 Quality of Visitor Experience Research

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

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

This report summarises the findings from the 144 visitor interviews conducted at Craig y Dinas in 2015. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites), and the previous survey conducted at this site in 2012 (where applicable) to track any changes over time.

1.2 Craig y Dinas

Craig y Dinas Craig y Dinas is located at the eastern end of Pontneddfechan and includes Dinas Rock, on the flat top of which once stood an ancient fort. This imposing limestone cliff sits on a zone of faults and folds known as the Neath Disturbance which extends north eastwards from Swansea Bay and through the Vale of Neath. It is also called the Dinas Rock.

Activities include walking, climbing and abseiling. This was a mining area for limestone and sandstone, which created tunnels and caves in the area. There is also a river and waterfalls for people to enjoy. This is a family friendly place to visit with audio trails available for children.

1.3 Perceptions of the site

Perceptions of Craig y Dinas as a place to visit were very positive; this was also the case across all Wales sites. Only 1% of the people interviewed at Craig y Dinas in gave a negative rating of the site.

In 2015 there has been an increase in those rating the site as excellent; nearly six in ten (57%) gave an excellent rating, and while this is in line with the all Wales figures (58%), it is a considerable improvement from 2012, when just 29% of visitors said the same. In the 2012 survey, visitors tended to be less enthusiastic about the site; 49% rated it as very good, and a further 19% as very good. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 89%, up from the 2012 figure of 78%.

Similarly, ratings of how safe and welcoming Craig y Dinas felt were also very positive, which was also the case across all Wales sites. None of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming. Just over a third of visitors gave this measure an 'excellent' rating (38%); this is an improvement on the 2012 survey (28%), but noticeably lower than the figure obtained for all Wales sites (52%).

Another four in ten (42%) gave a 'very good' rating for how safe and welcoming Craig y Dinas felt; this remains relatively unchanged from 2012 (45%) but is slightly higher than the all Wales figure of 37%. Just over one in ten (13%) gave a 'good' rating (21% in 2012; 8% for all Wales). Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 80%, up from the 2012 figure of 73%.

When asked whether they would be likely to recommend Craig y Dinas as a place to visit to a friend or relative (using a score of 0-10), scores for Craig y Dinas and all Wales sites generally were positive, although a sizable minority of one in ten (11%) gave a rating of less than 8/10 (higher than the 6% all Wales average). Back in 2012, 15% of visitors gave a rating of less than 8/10.

Around half (48%) gave a rating of 10, which was significantly lower than both the 2012 figure (68%) and the all 2015 Wales average (62%). In the recent survey, more visitors gave less enthusiastic ratings of 8 out of 10 (22%) and 9 out of 10 (19%) compared to the previous survey.

Despite this slight shift in the numbers giving higher ratings, the overall average rating of the site remained high at 9.0; this was marginally lower than the all Wales average score of 9.4, but higher than the 2012 score of 8.7 (which was lowered due to the number of visitors giving low scores).

Looking at the perceived quality of various facilities at the site; the feature that received the highest score was the waterfalls. Seven in ten rated these as 'excellent' (72%) whilst most others rated them as 'very good' (19%) or good (6%). Gorge walking also received very high scores: two thirds rated this feature as 'excellent' (67%), with all remaining users saying this was very good or good (36%). Just under half rated the walking trails as excellent (49%).

The facility that received the least positive rating was the car park: while the majority rated this positively (87% saying 'excellent', 'very good' or 'good'), another 12% rated this as 'fair'.

1.4 Strengths of the site

One favourite thing about Craig y Dinas stood out; the most mentioned (by over half of visitors) was the scenery and beautiful views' (56%), followed by around three in ten mentioning walks, paths and trails (28%) and the peace and tranquillity of the site (27%). Another one in five mentioned the fresh air and being outside (20%).

Most of the findings for Craig y Dinas were in line with both the all Wales data and the 2012 data, with the exception of peacefulness; higher proportions mentioned this previously and across all Wales sites.

1.5 Areas for improvement

Nearly half of visitors to Craig y Dinas could not think of anything that would add to their enjoyment and only made positive comments (44%). This was significantly higher than was seen in 2012 (31%), but lower than the all Wales average of 53%, meaning there were fewer issues with this individual site in 2015 compared to 2012, but slightly more issues at this site in 2015 compared to all Wales sites in general.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. Most comments related to a need to improve the toilet facilities at the site (28%); this was by far the most frequent complaint received, and much higher than the all Wales average of 8%. However, this was also an issue back in 2012, when 33% of visitors called for an improvement to the toilets.

There were calls by small minorities for:

- Improve signage / more maps / better maps
- More information on wildlife / vegetation / area
- Longer opening hours (shop / café / main gates)
- Better access / make more accessible (including disabled access)
- Fewer people / fewer cyclists
- More picnic areas / BBQ / picnic tables and benches
- Improve maintenance of paths / cycle tracks / better surfacing
- Camping / places to stay overnight (lodges)
- Easier / less challenging trails, paths and cycle routes
- On-site pub
- Dog washing facilities
- Drinking water facilities
- Bike shop / more shops.

1.6 Visitor profile

In 2015, over half (51%) of visitors to Craig y Dinas were first time visitors; this proportion was markedly higher than the all Wales average of 37% who said they had **never** visited their respective NRW site before, and slightly higher than the 2012 figure of 47%. Therefore, just less than half of visitors to Craig y Dinas had been to the site previously (49%).

While the slight majority of visitors to Craig y Dinas were day trippers (61%), this proportion has dropped somewhat since 2012 (74%). In contrast, therefore, the number of visitors in 2015 staying in the area overnight or as part of a longer holiday increased to 39% (up from 24% in 2012). The current findings are in line with the all Wales average (62% day trippers, 37% staying visitors). Amongst the day trip visitors to Craig y Dinas, most were local, travelling for less than three hours to reach the site (44%).

The gender profile was skewed slightly towards more males than females (56% of visitors were male compared with 44% female), which was very close to the all Wales profile (58% male and 42% female for the all Wales average). In 2012, the gender profile of visitors was much more heavily skewed towards males (71%) rather than females (29%).

Similarly, in terms of age, the profile of visitors to Craig y Dinas was slightly younger than all Wales average. Nearly four in ten (37%) were aged 16-34 years (vs. 22% all Wales), with a further four in ten (42%) aged 35-54 years (vs. 43% all Wales). There were significantly fewer visitors aged 55+ at Craig y Dinas (21%) compared to the all Wales average of 34%. Ages of visitors to the site remained consistent with the findings of the previous survey conducted in 2012.

2. Introduction

2.1 Background

The woodland estate managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) covers some 105,000 hectares and 256,000 hectares respectively. NRW also manages a number of National Nature Reserves (NNRs) across Wales.

Each year in Wales, around 4 million visits are made to the woodland estate including 0.5 million to sites with visitor centres with a further 3 million visits made to NNRs. In England, around 40 million visits are made to the estate each year, including 3 million to sites with visitor centres.

The use and enjoyment of woodlands and green-space can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming green space provides an excellent setting for outdoor recreation such as walking, cycling and horse riding. Regular outdoor exercise lowers rates of obesity, cardiovascular disease, osteoporosis and type-2 diabetes as well as some cancers. It can contribute to a lifelong pattern of healthy living if encouraged amongst the young, and in the elderly it contributes to greater mobility and fewer injuries associated with ageing.

The experience of a natural environment and the opportunity for exercise can assist in treating people with mental health problems, in modifying anti-social behaviour in young children and adolescents, in supporting people dealing with stress and depression, and can also help to improve concentration in the workplace.

The provision of a quality visitor experience will help to encourage both repeat and new visitors. The quality of visitor experience depends not only on the facilities provided at a site (notice boards, playgrounds, toilets, car park, walking trails), but also on the 'sense of welcome' that the woodland provides. This 'sense of welcome' in turn depends both on the maintenance of the woodland (rubbish, dog dirt, brambles, mud) and also the nature of the woodland itself (light & open or dense & dark).

Maintaining or improving the quality of experience at NRW and FCE managed sites is part of a wide-ranging programme of work to encourage the development and promotion of woodland access throughout Wales and England with suitable infrastructure and well managed woodlands that feel safe and welcoming.

NRW and FCE have commissioned a variety of visitor surveys in recent years in relation to the usage of their forests, woodlands and National Nature Reserves. The Quality of the Visitor Experience Survey has been conducted since 2006, but has been run in its current format since 2010. The main aims of the survey are:

- To provide information on the quality of visitor experience at each site
- Use a set of standard questions so that the quality of visitor experience at each site can be scored, benchmarked and tracked over time
- For sites in Wales, also use a set of tailored questions at each site to give information on how the visitor experience at that particular site could be improved.

2.2 Research programme

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

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

Table 1 below details the sites surveyed in 2015, along with the number of interviews completed at each.

Table 1: Interviewing sites and number of interviews conducted

England		Wales	
Site	No. of interviews	Site	No. of interviews
Dalby	259	Cadair Idris NNR (H)	233
Fineshade	274	Craig y Dinas (M)	144
Haldon	243	Fforest Fawr (M)	147
Hicks Lodge	233	Gwaun Hepste (M)	127
Jeskyns	287	Hafod (M)	140
Kielder	244	Newport Wetlands NNR (H)	233
Wyre	222	Tan y Coed (M)	164
TOTAL	1,762	TOTAL	1,188

* H = High usage; M = Medium usage

Interviews were conducted face-to-face with visitors who are exiting the site or coming to the end of their visit, with interviewing points situated at key access points.

The core interviewing period ran from March to October 2015. At Craig y Dinas, interviewing took place between 31st March and 26th October, and a total of 144 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Craig y Dinas in 2015, and includes individual sites scores on key visitor measures. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites) and the previous survey conducted at this site in 2012 (where applicable) to track any changes over time.

Results are presented as rounded percentages (no decimals), which may mean that some percentages do not add up exactly to 100%.

2.4 Data tables

Comprehensive data tables are available separately, and contain the following cross-breaks:

- Home region
- Home nation
- Age
- Gender
- Social class
- Group composition
- Ages of children
- Day trip vs. staying visitor
- First time vs. repeat visitor
- Limiting illness
- Quality of experience.

3. Visitor profile information

3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Craig y Dinas. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2015. The profile of visitors to Craig y Dinas was very similar to that of the visitors to all the Wales sites.

The gender profile was skewed slightly towards more males than females (56% of visitors were male compared with 44% female), which was very close to the all Wales profile (58% male and 42% female for the all Wales average). In 2012, the gender profile of visitors was much more heavily skewed towards males (71%) rather than females (29%).

Similarly, in terms of age, the profile of visitors to Craig y Dinas was slightly younger than all Wales average. Nearly four in ten (37%) were aged 16-34 years (vs. 22% all Wales), with a further four in ten (42%) aged 35-54 years (vs. 43% all Wales). There were significantly fewer visitors aged 55+ at Craig y Dinas (21%) compared to the all Wales average of 34%. Ages of visitors to the site remained consistent with the findings of the previous survey conducted in 2012.

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). There was an equivalent skew towards ABC1 visitors at Craig y Dinas, with 76% of visitors categorised as ABC1, and 24% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

No doubt reflecting the socio-economic profile, the majority of visitors to Craig y Dinas were in full-time employment (61%), which was in line with the all Wales average and the 2012 survey data (59% for both). Reflecting the younger age profile of visitors to the site, only 12% were retired (compared to 18% for all Wales); fewer visitors were retired in 2012 (7%).

Nearly three in ten (29%) had children living at home; equalling the all Wales average of 29% (no data for 2012).

The overwhelming majority of visitors to Craig y Dinas were White British / Welsh / Irish (90%), with only a small number of visitors describing their ethnicity as 'White other (8%) or 'Black / Asian / Mixed' (2%); these figures were in line with the all Wales averages.

A total of 15% of visitors to Craig y Dinas spoke Welsh, which was again in line with the all Wales average of 13% – see Table 2 below for more details.

Table 2: Profile of visitors by key demographics 2015

Demographic groups		Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales %
Gender	Male	56	71	58
	Female	44	29	42
Age	16 - 24	10	12	6
	25 - 34	27	23	16
	35 – 44	20	26	21
	45 – 54	22	18	22
	55 – 64	13	9	19
	65+	8	8	15
	Refused	1	3	1
Social class	AB	29		32
	C1	47		43
	C2	12		16
	DE	13		9
	Refused	-		1
Working status	Full-time employee (30+ hours per week)	61	59	59
	Part-time employee (<30 hours per week)	10	5	9
	Self-employed	9	12	6
	Full-time education	5	5	3
	Unemployed	2	3	1
	Retired	12	7	18
	Looking after the home	1	4	2
	Refused	-	-	1
Limiting illness	Yes – limited a lot / little	2	6	6
	No	97	94	92
	Refused	1	-	2
Children in household	Yes	29		29
	No	69		70
	Refused	1		1

Demographic groups		Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales %
Ethnicity	White – British / Welsh / Irish	90		91
	White – Other	8		7
	Black / Asian / Mixed	2		2
Welsh speaker	Yes	15		13
	No	85		87

Base: All visitors – Craig y Dinas 2015 (144); Craig y Dinas 2012 (98) All Wales (1,188).

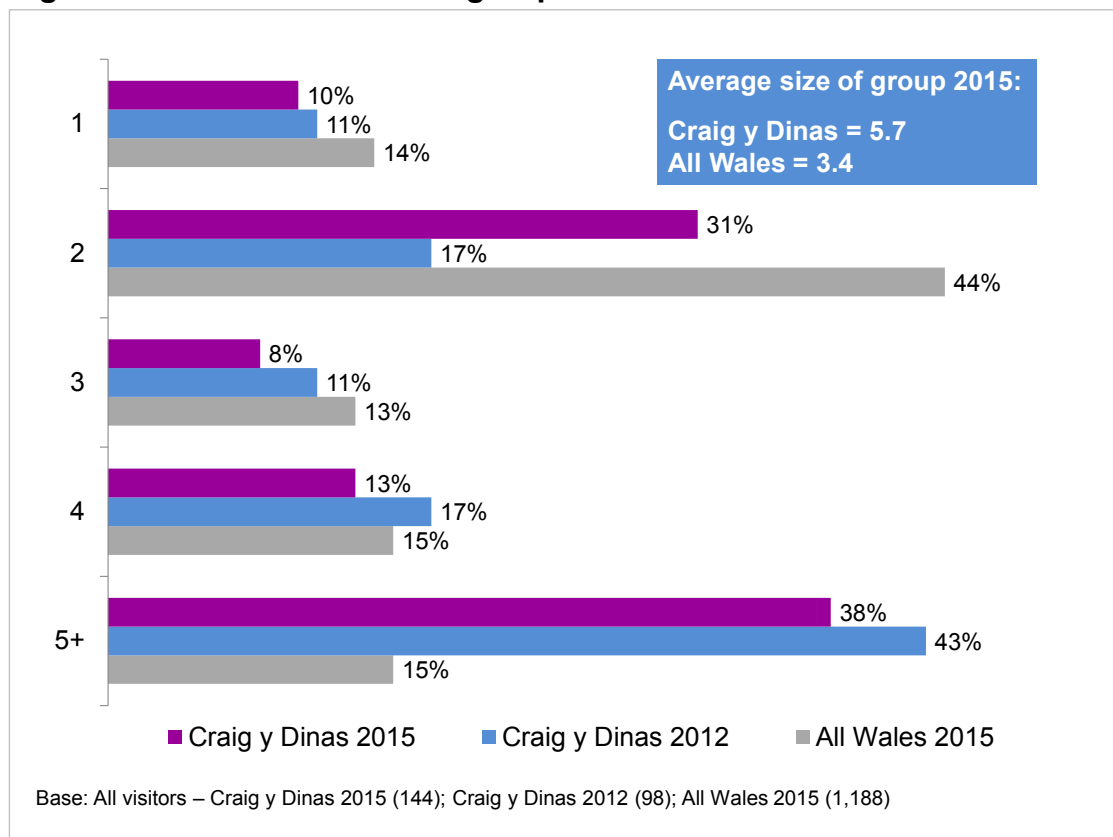
3.2 Group profile

3.2.1 Size of group

Group sizes at Craig y Dinas (averaging 5.7 people), were much larger than group sizes to all Wales sites (which averaged 3.4 people). This is reflecting in the finding that the highest proportion of visitor groups to the site were made up of five or more people (38%). While this is in line with the 2012 data (43% 5+ people), both figures were considerably higher than the all Wales average of 15%

A further three in ten of the groups visiting Craig y Dinas contained two people (31%), which was higher than the 2012 figure (17%) but lower than the all Wales figure (44%) – see Figure 1.

Figure 1: Q1. Total size of the group



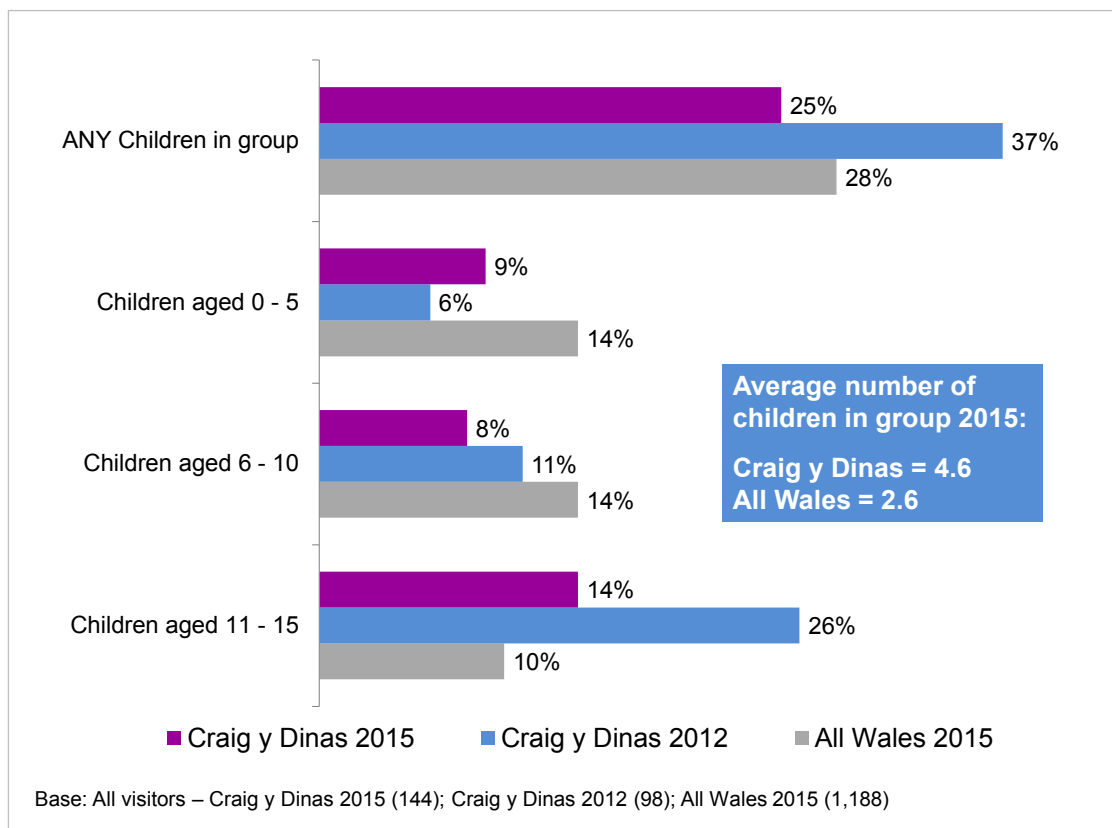
3.2.2 Composition of group

A quarter of the groups who visited Craig y Dinas contained children (25%): while this was in line with the all Wales figure of 28%, it was noticeable lower than the finding from the 2012 survey, when 37% of groups contained children.

While the proportion of visitor groups with children at Craig y Dinas was in line with the all Wales average, the number of children visiting in each group at this site was significantly higher than the all Wales average (mean of 4.6 children per group at Craig y Dinas cf. 2.6 all Wales).

Children visiting Craig y Dinas tended to be aged 11-15 years, with 14% of visitor groups containing children of this age. This was also the case in 2012, although the pattern was much more pronounced with the previous survey, when 26% of visitor groups contained children aged 11-15 years - see Figure 2 below.

Figure 2: Q1. Composition of group



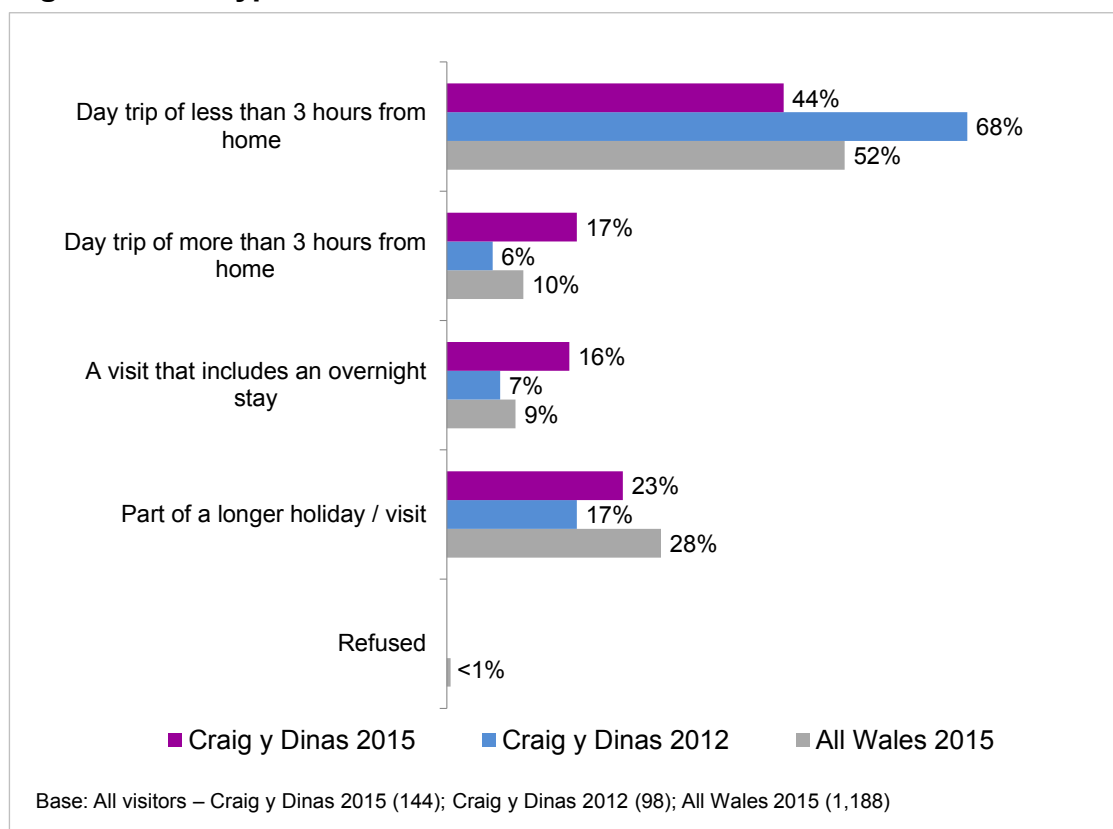
4. Profile of visit

4.1 Type of visit

While the slight majority of visitors to Craig y Dinas were day trippers (61%), this proportion has dropped somewhat since 2012 (74%). In contrast, therefore, the number of visitors in 2015 staying in the area overnight or as part of a longer holiday increased to 39% (up from 24% in 2012). The current findings are in line with the all wales average (62% day trippers, 37% staying visitors).

Amongst the day trip visitors to Craig y Dinas, most were local, travelling for less than three hours to reach the site (44%) – see Figure 3 below.

Figure 3: Q2. Type of visit



4.2 Visitor origin

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

There was a fairly even split between visitors coming from outside of Wales (49%) and those living in Wales (51%). Wales' residents tended to live in the south of the country (41%), while most of those visiting from outside of Wales resided in England (44%) – Table 3 below and Figure 4 overleaf provide more details.

Please note that comparable information for 2012 was not available, however, a map denoting the area of residence (from the previous report) has been included overleaf.

Table 3: Q28b. Visitor origin 2015

Area of residence		Craig y Dinas 2015 %	All Wales %
Home region	North Wales	-	4
	Mid / West Wales	3	14
	South West Wales	26	7
	Valleys	7	6
	South East Wales	15	30
	Outside of Wales	49	39
Home nation	Wales	51	61
	England	44	35
	Rest of UK	1	<1
	Abroad	4	4

Base: All visitors – Craig y Dinas 2015 (144); All Wales (1,188)

Figure 4a: Map of visitor origin for Craig y Dinas 2015



Figure 4b: Map of visitor origin for Craig y Dinas 2012



4.3 Frequency of visits

4.3.1 First-time visitors

In 2015, over half (51%) of visitors to Craig y Dinas were first time visitors; this proportion was markedly higher than the all Wales average of 37% who said they had **never** visited their respective NRW site before, and slightly higher than the 2012 figure of 47%.

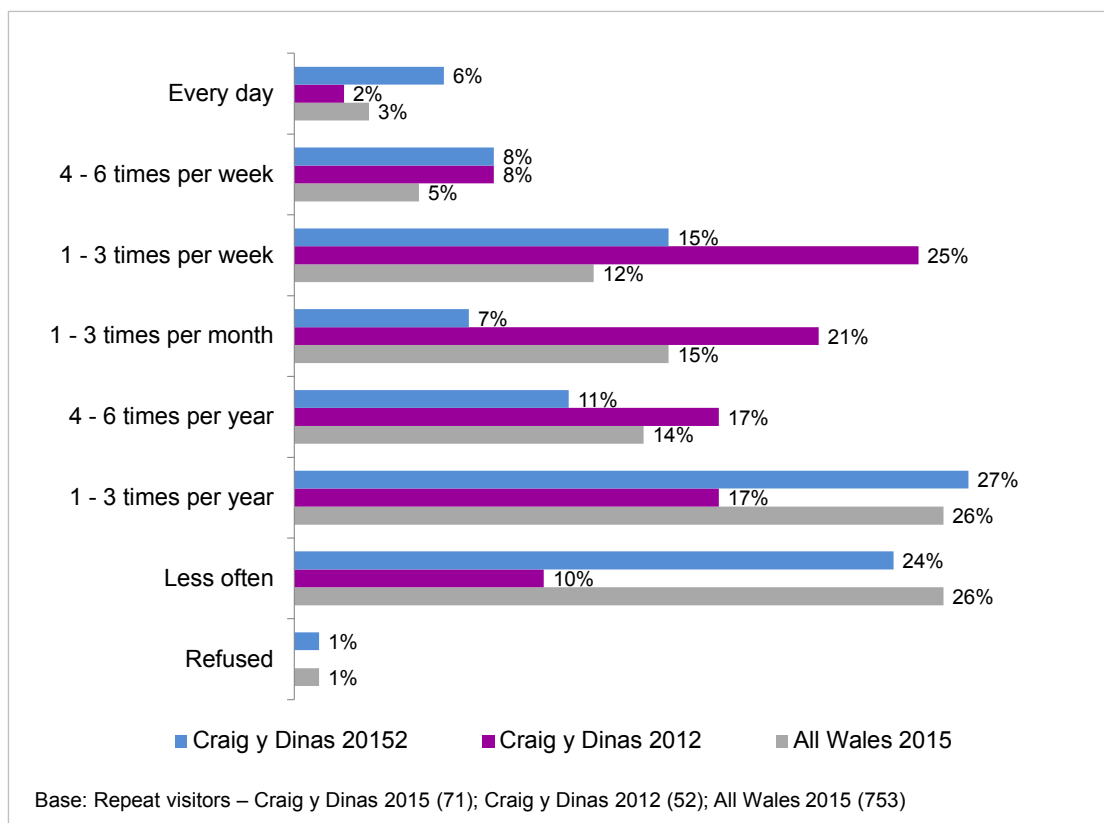
Therefore, just less than half of visitors to Craig y Dinas had been to the site previously (49%).

4.3.2 Repeat visitors

Focussing on repeat visitors: a higher than average proportion of these people were very regular visitors to the site. Nearly three in ten (29%) came to Craig y Dinas at least once a week, with 6% visiting every day. Amongst all Wales visitors, only 20% were weekly visitors (3% coming every day). Compared to the 2012 research, the proportion of weekly visitors has declined slightly (down from 35%), although the number of daily visitors has increased (up from 2%).

At the other end of the scale; over half (51%) or repeat visitors to Craig y Dinas were fairly infrequent visitors; 27% visited one to three times a year, while a similar proportion (24%) visited less often than once a year. These figures are in line with the all Wales average (52% infrequent visitors), but are much higher than the 2012 survey (27%). Back in 2012, more repeat visitor were coming to the site monthly or bimonthly (38% vs. 18% in 2015) – see Figure 5 overleaf for more details.

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



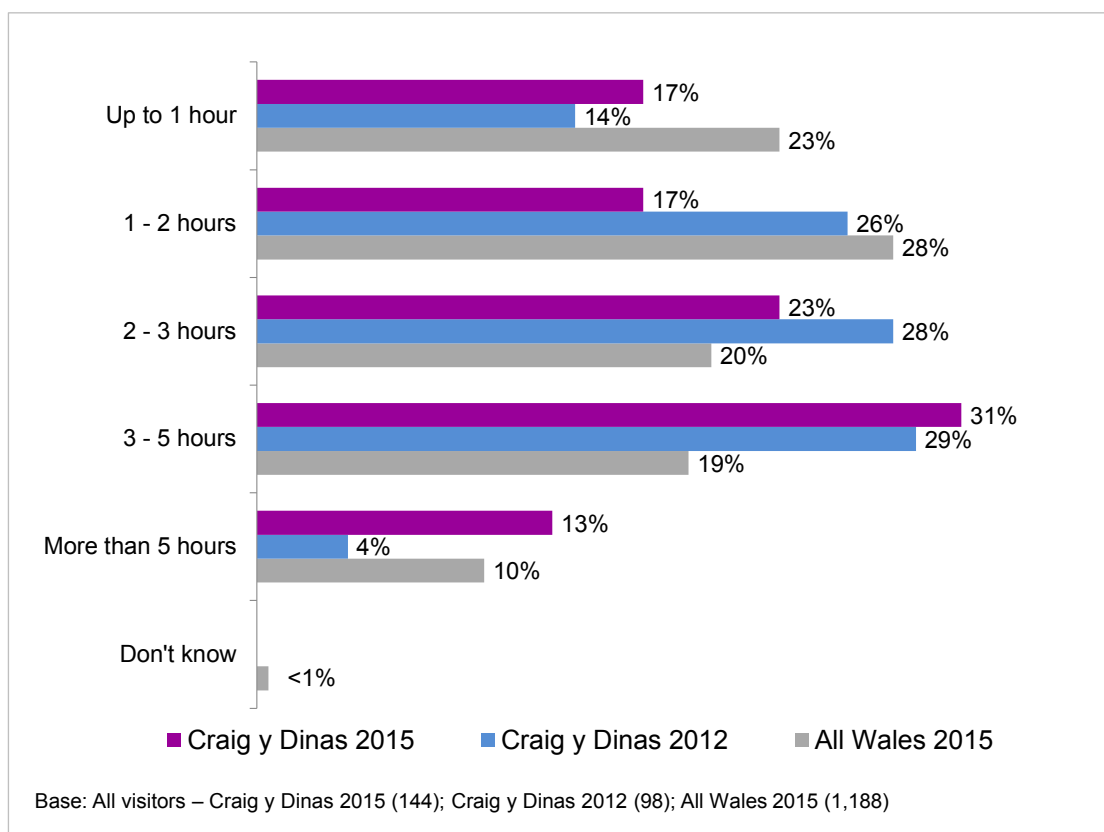
4.4 Length of visit

Visitors to Craig y Dinas were at the site an average of 2 hours and 56 minutes; slightly longer than both the average length of stay in 2012 (2 hours 31 minutes) and across all sites in Wales in 2015 (2 hours 24 minutes).

The varying lengths of time visitors spent at Craig y Dinas can be seen overleaf. Roughly a third of visitors were at the site for up to two hours (34%), over half spent two to five hours at the site (54%).

The most noticeable difference between the recent and previous surveys is that a much higher proportion were spending long periods of time (5+ hours) at this site in 2015 (13%) compared to 2012 (4%) - see Figure 6 overleaf.

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

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

The most popular activity at Craig y Dinas was walking generally (87%) - this was in line with the all Wales average of 92%. At Craig y Dinas, as with all the Wales sites, using sign-posted trails was the most popular mode of walking (59% cf. 68% all Wales), although walking off-trails was also fairly popular at this site (43% cf. 28% all Wales). Therefore, a significantly higher proportion of visitors to Craig y Dinas took part in walking in 2015 compared to 2012 (55%).

Cycling represented a very small percentage of activities at Craig y Dinas (1%), but this was comparable to 2012 survey and the all Wales data (1% for each). Just less than one in ten took part in rock climbing at this site (6%); this was not mentioned in 2012. Other physical activities such as running / jogging, orienteering / Geocaching or horse-riding at this site were undertaken by only a small proportion of visitors (3%), with the exception of gorge walking (undertaken by 13% of visitors).

Therefore, the vast majority of visitors took part in 'active' activities (94%): this proportion is in line with the all Wales figure of 93% and significantly higher than the 2012 figure of 57%.

Three quarters of visitors to Craig y Dinas also took part in 'passive' activities (73%); this is marginally higher than the all Wales average (59%).

Popular 'passive' activities at Craig y Dinas included admiring the views (29%), photography (28%), using the café / restaurant / other catering (17%), visiting as part of an organised trip (16%) and having a picnic or barbeque (13%).

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

Activities undertaken	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
Cycling on forest roads, tracks or trails	1	-	1
Cycling off trails or tracks	-	1	1
TOTAL CYCLING	1	1	1
Walking on a sign-posted trail	59	36	68
Walking but not following sign-posts	43	11	28
Dog walking	14	21	24
TOTAL WALKING	87	55	91

Activities undertaken continued	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
Gorge walking	13	-	2
Orienteering / Geocaching	1	3	1
Running / jogging	1	-	2
Horse-riding	1	-	<1
Rock climbing / abseiling	6	-	1
Admiring the views	29	20	24
Photography	28	7	16
Using the café / restaurant / other catering	17	-	13
Organised trip / event	16	29	3
Picnic or barbeque	13	6	12
Seeing something in the forest	8	2	5
Bird watching	6	3	13
Nature / natural history visit	5	1	5
Using the Visitor Centre / shop	3	-	8
Camping	3	-	1
Waterfalls	2	-	1
Using the play area	1	-	5
A forest drive	1	-	1
Swimming	1	-	<1
Site specific event	1	-	<1
Fishing	1	-	<1
Taken part in ACTIVE activities	94	57	93
Taken part in PASSIVE activities	67	Not available	59

Base: All visitors – Craig y Dinas 2015 (144); Craig y Dinas 2012 (98) All Wales (1,188)

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

4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking running / jogging (2) and orienteering / Geocaching (1) these have not been commented on.

As previously mentioned, visits to Craig y Dinas lasted 2 hours and 56 minutes on average. Those walking spent an average of 2 hours and 11 minutes doing this: slightly longer than average time of 2 hours 3 minutes spent walking at Craig y Dinas in 2012.

Roughly half (54%) walked around the site for up to 2 hours, while 45% spent more than two hours walking (26% of these walking for between three and five hours) – see Table 5 below for more details.

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

Time at site	Total duration of visit		Time spent on any walking	
	2015	2012	2015	2012
Up to 30 minutes	5	2	14	2
31 – 60 minutes	12	12	18	23
1 – 2 hours	17	26	22	34
2 – 3 hours	23	28	15	21
3 – 5 hours	31	29	26	19
5+ hours	13	4	4	2
Don't know	-	-	-	-
AVERAGE	2 hours 56 mins	2 hours 31 mins	2 hours 11 mins	2 hours 3 mins

Base: All respondents - 2015 (144); 2012 (98)
 Respondents who walked - 2015 (119); 2012 (53)

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

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

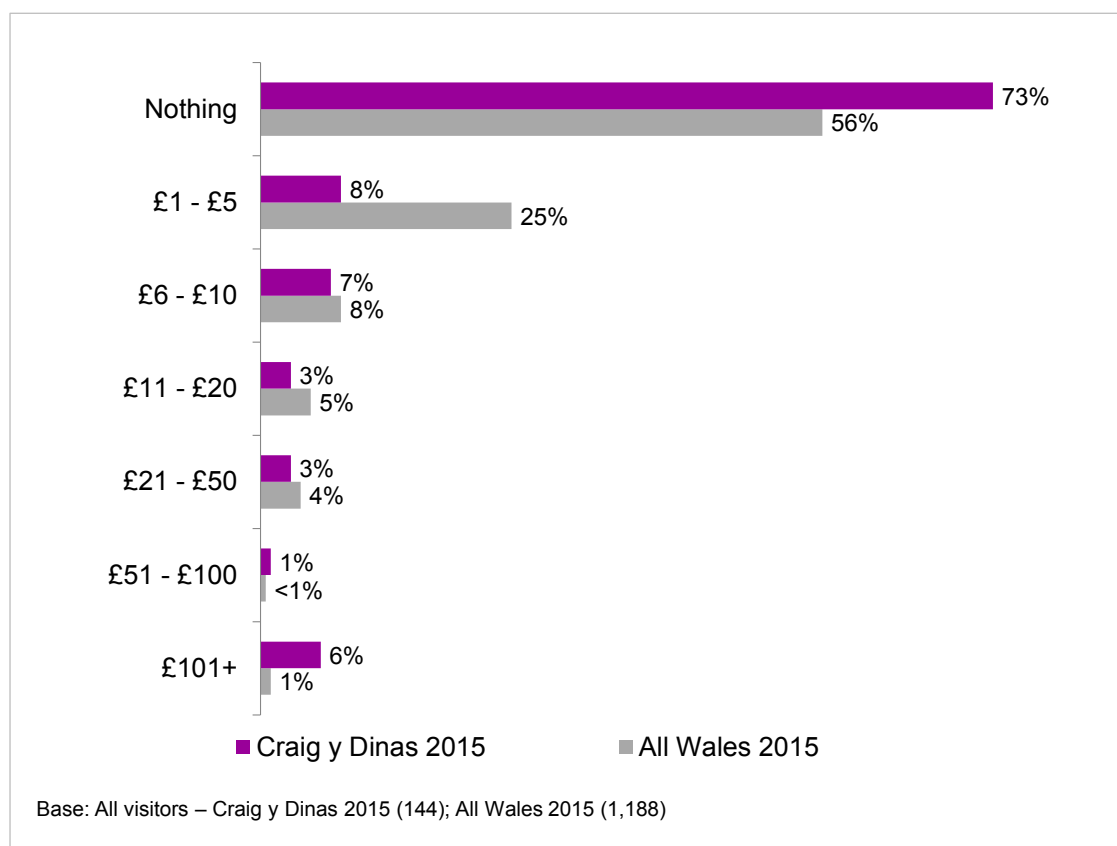
Only around a quarter of visitors intended to spend any money at the site (27%), but for 6% of these, the intended spend was large (£101+); this is noticeably higher than the all Wales average of 1% of visitors intending to spend large amounts.

Most visitors saying they would be spending money at Craig y Dinas only intended to spend up to £10 (15%), with another 3% intending to spend £11 - £20 and 4% intending to spend between £21 and £100.

The average spend at Craig y Dinas was £23.60, while across all Wales sites it was £6.99. This differential is being driven by the relatively high proportion of Craig y Dinas visitors intending to spend high amounts at the site.

NB The spend data is based on all visitors, not just on those who said they would spend something. This allows an average spend across all visitors to be calculated. However, when not many visitors to a site plan to spend on something (particularly if that feature is not available at a site), the average spend shown can appear to be low/unusual, and comparisons to the all Wales data should be considered with this in mind.

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



When looking at individual types of spending at the site, the item that the highest proportion of visitors to Craig y Dinas were likely to spend anything on was food and drink, with two in ten (20%) planning to spend on this (average of £2.12, in line with the all Wales average of £2.16).

However, the higher than average overall spend at the site is being driven by considerably higher than average intended spend on activities (£12.82 vs. £1.56 all Wales average) and hiring equipment (£9.32 vs. £1.11 all Wales average) - see Table 6a below.

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

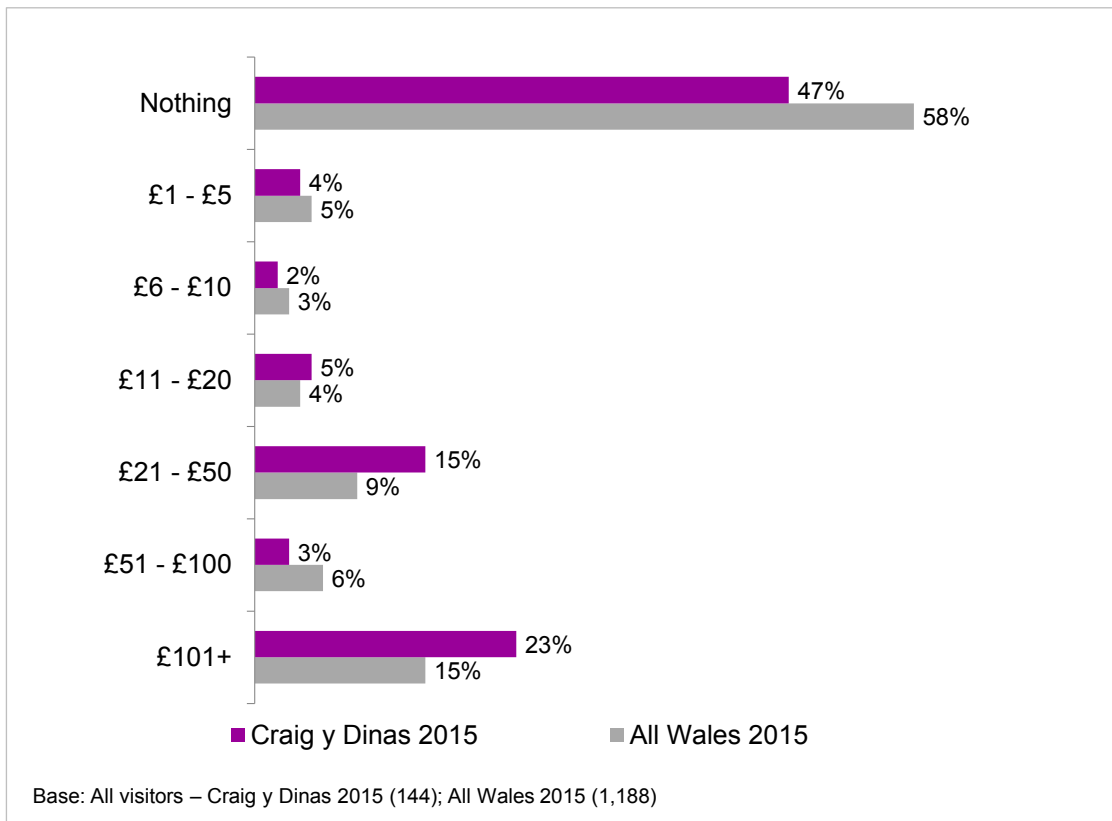
Areas of expenditure	% spending anything on items		Average spend on items £	
	Craig y Dinas %	All Wales %	Craig y Dinas £	All Wales £
Food and drink	20	22	2.12	2.16
Activities at the site	5	1	12.82	1.56
Parking	1	27	0.03	1.68
Souvenirs / gifts	-	3	-	0.41
Hiring equipment	3	1	9.32	1.11
Anything else	-	1	-	0.10

Base: All visitors – Craig y Dinas 2015 (144); All Wales 2015 (1,188)

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

Around half of visitors to Craig y Dinas did not intend to spend any money in the local area (47%). When visitors **did** intend to spend, amounts polarised between a fairly modest spend of up to £50 (26%) and larger amounts of over £101 (23%). The resulting average group spend in the area around the site was £115.13 (compared to £87.52 for all Wales sites), and accommodations accounted for the highest average spend around this site (see Table 6b overleaf) – this links to the previous finding where 49% of visitors lived outside of Wales.

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



Looking in more detail at spend in the local area as a result of their visit to Craig y Dinas, food and drink (35%), accommodations and transport (23% for each) were mentioned by the highest proportions of visitors; the highest average spend was on accommodation (£85.46), which was somewhat higher than the all Wales average of £51.81- see Table 6b below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Craig y Dinas %	All Wales %	Craig y Dinas £	All Wales £
Food and drink	35	29	25.89	21.06
Accommodations	23	19	86.46	51.81
Admissions to other attractions	3	4	0.65	3.99
Parking	5	7	0.29	1.67
Transport	23	22	8.45	9.15
Souvenirs / gifts	2	4	0.35	1.65
Hiring equipment	3	1	2.74	1.82
Anything else	1	2	0.05	1.02

Base: All visitors – Craig y Dinas 2015 (144); All Wales 2015 (1,188)

5. Perceptions of the site

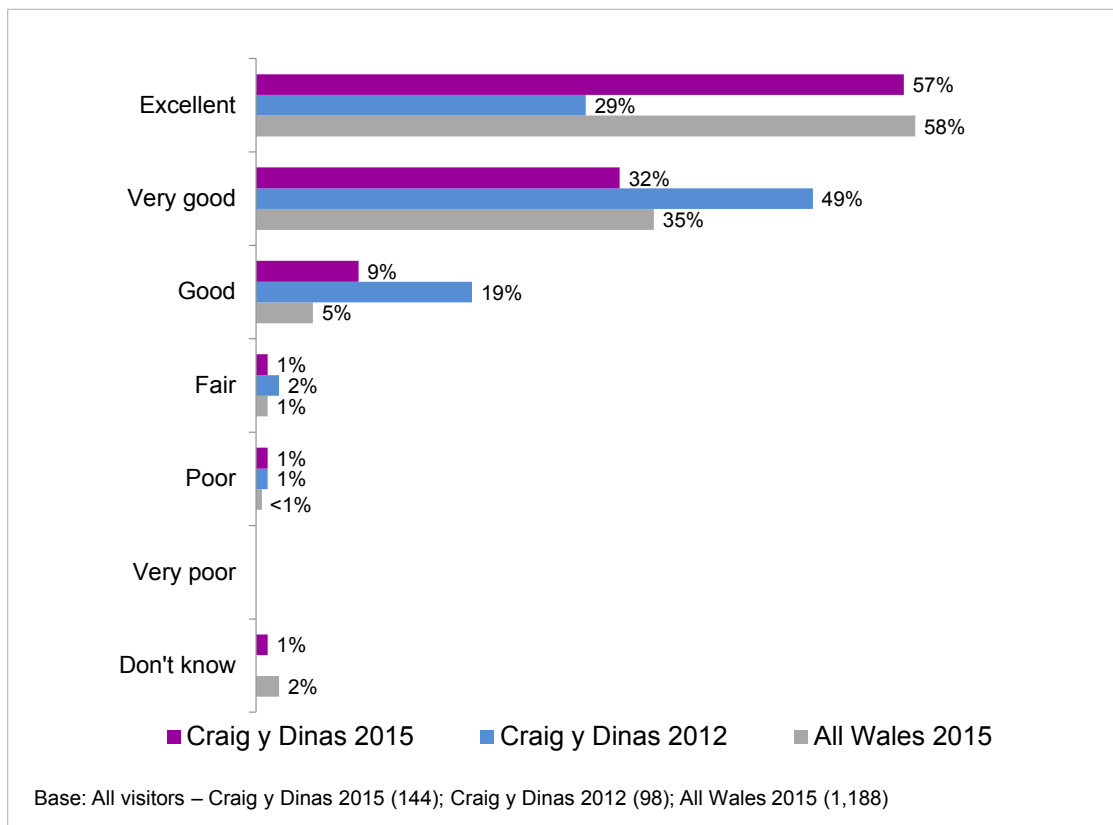
5.1 Overall rating of the site as a place to visit

Perceptions of Craig y Dinas as a place to visit were very positive; this was also the case across all Wales sites. Only 1% of the people interviewed at Craig y Dinas in gave a negative rating of the site.

In 2015 there has been an increase in those rating the site as excellent; nearly six in ten (57%) gave an excellent rating, and while this is in line with the all Wales figures (58%), it is a considerable improvement from 2012, when just 29% of visitors said the same. In the 2012 survey, visitors tended to be less enthusiastic about the site; 49% rated it as very good, and a further 19% as very good.

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 89%, up from the 2012 figure of 78% – see Figure 9 below.

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



5.2 Overall rating of the site as safe and welcoming

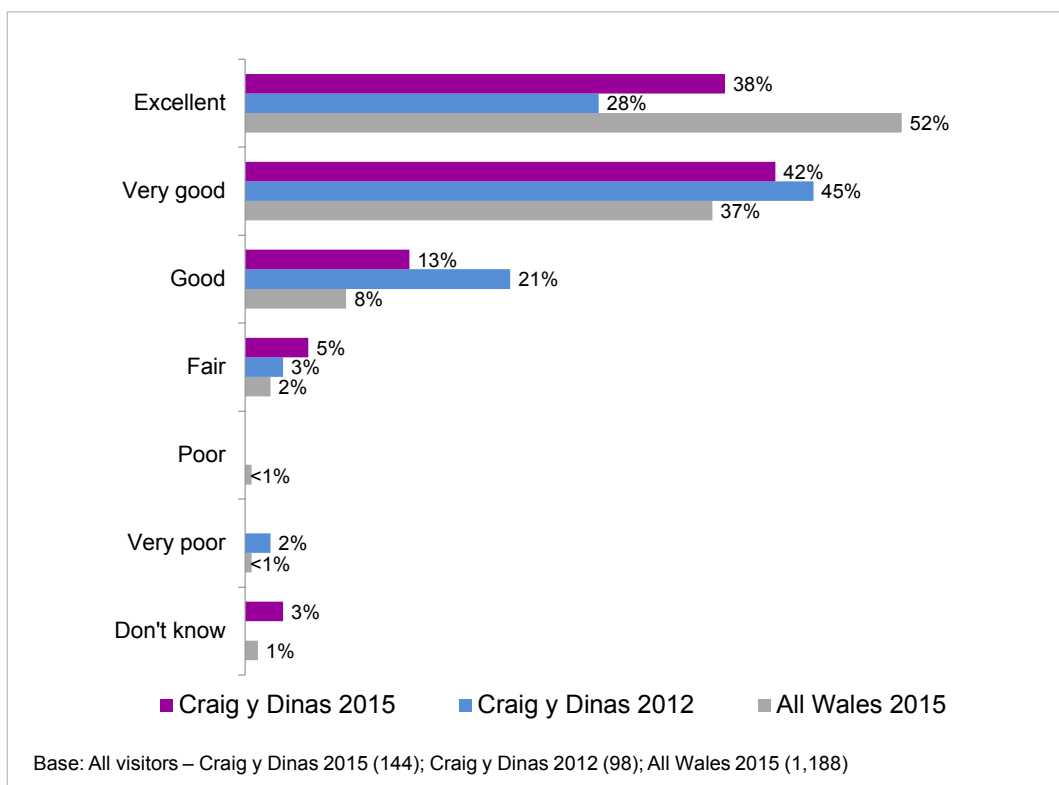
Similarly, ratings of how safe and welcoming Craig y Dinas felt were also very positive, which was also the case across all Wales sites. None of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just over a third of visitors gave this measure an 'excellent' rating (38%); this is an improvement on the 2012 survey (28%), but noticeably lower than the figure obtained for all Wales sites (52%).

Another four in ten (42%) gave a 'very good' rating for how safe and welcoming Craig y Dinas felt; this remains relatively unchanged from 2012 (45%) but is slightly higher than the all Wales figure of 37%. Just over one in ten (13%) gave a 'good' rating (21% in 2012; 8% for all Wales).

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 80%, up from the 2012 figure of 73% – see Figure 10 below.

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



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

Table 7 below details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Craig y Dinas and all Wales sites. On the whole, smaller proportions of visitors spontaneously mentioned each of the aspects listed when compared to the all Wales data, but there were more comments made in 2015 compared to 2012.

The scenery, views and beautiful environment were mentioned by most visitors (34%), whilst 20% said that Craig y Dinas was peaceful, tranquil and relaxing. The beauty and tranquillity of Craig y Dinas were favoured by fewer at Craig y Dinas compared to all sites in Wales (34%).

Just less than a fifth (19%) reported that Craig y Dinas was a safe environment, while one in six appreciated the fresh and (15%), signposting (14%) and walking paths (13%) – see Table 7 below for more details.

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

Reasons for a positive rating of site	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
The scenery / views / beautiful environment	34	6	40
Peaceful / pleasant / tranquil / relaxing / welcoming	20	1	34
Safe environment generally	19	19	38
Fresh air / open space / freedom	15	-	24
Well signposted / good maps / information boards	14	3	26
Good provision of paths, trails and tracks	13	4	21
Well laid out / well organised / good set up	11	1	27
Other visitors here are friendly	8	-	10
Good car parking (good with horse box)	8	1	3
Friendly / helpful staff or rangers	8	3	8
Clean / tidy / well maintained / litter free	7	1	23
Live locally / convenient / easy to get to	5	-	5
Good quality facilities or amenities	4	1	12
Away from roads / no cars / cars drive slowly	3	-	1

Reasons for a positive rating of site	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2014 %
Good, safe place for the kids to play and run around	2	-	14
Good value for money / cheap / free	2	-	<1
Not too crowded	2	-	1
Don't know	2	-	3
General positive comments	5	21	3
Some negative comments	5	-	5

Base: Visitors rating the site as excellent, very good or good – Craig y Dinas 2015 (140); Craig y Dinas 2012(83); All Wales 2015 (1,175)

There were a several aspects mentioned by one or two visitors, a selection of these were as follows (full details can be found in the survey data tables):

- Plenty of other people around
- Away from cars / no cars / cars drive slowly
- Easily accessible for wheelchairs / pushchairs
- Not as safe as it used to be / no cameras / security / feel vulnerable
- Needs better signage (more description / clearer / more signs in general)
- Not too crowded / not too busy (walkers / cyclists)
- Good café / good catering.

5.3 Recommending the site as a place to visit

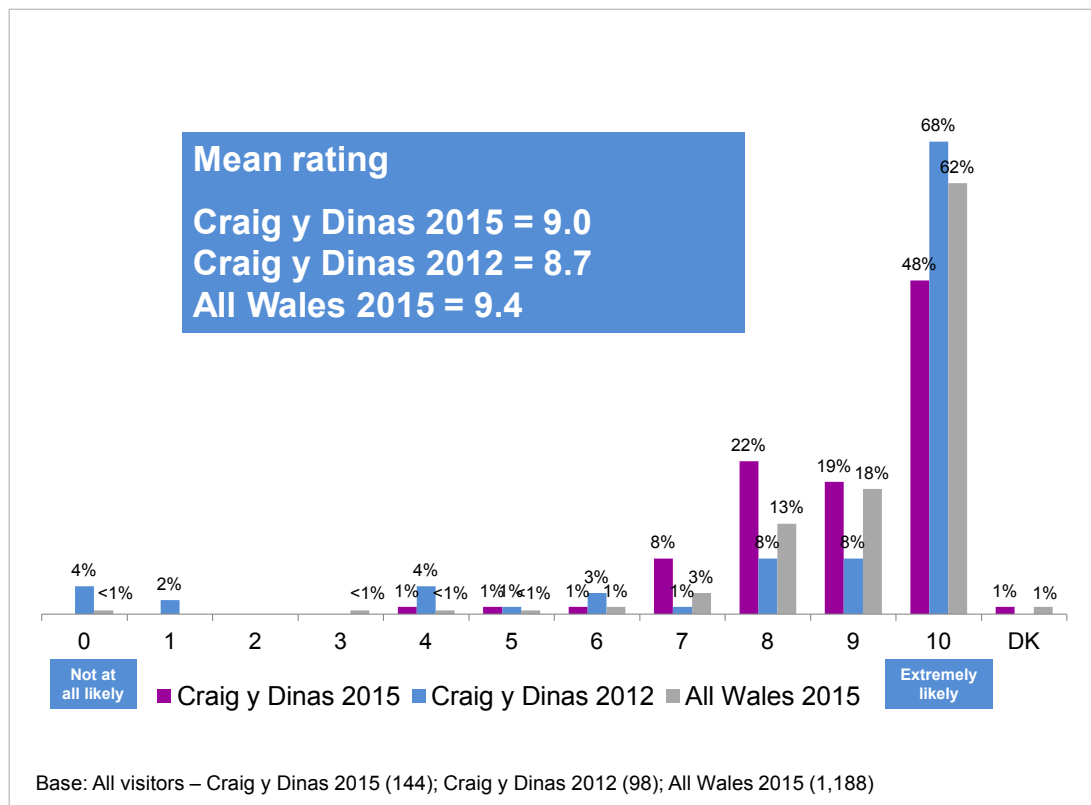
Visitors were asked whether they would be likely to recommend Craig y Dinas as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Craig y Dinas and all Wales sites generally were positive, although a sizable minority of one in ten (11%) gave a rating of less than 8/10 (higher than the 6% all Wales average). Back in 2012, 15% of visitors gave a rating of less than 8/10.

Around half (48%) gave a rating of 10, which was significantly lower than both the 2012 figure (68%) and the all 2015 Wales average (62%). In the recent survey, more visitors gave less enthusiastic ratings of 8 out of 10 (22%) and 9 out of 10 (19%) compared to the previous survey.

Despite this slight shift in the numbers giving higher ratings, the overall average rating of the site remained high at 9.0; this was marginally lower than the all Wales average score of 9.4, but higher than the 2012 score of 8.7 (which was lowered due to the number of visitors giving low scores) – see Figure 11 below.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Craig y Dinas is 64, which is markedly lower (by 15 points) than the all Wales score of 79, but in line with the 2012 NPS score of 62 for this site.

5.4 Strengths of the site

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

One favourite thing about Craig y Dinas stood out; the most mentioned (by over half of visitors) was the scenery and beautiful views’ (56%), followed by around three in ten mentioning walks, paths and trails (28%) and the peace and tranquillity of the site (27%). Another one in five mentioned the fresh air and being outside (20%).

Most of the findings for Craig y Dinas were in line with both the all Wales data and the 2012 data, with the exception of peacefulness; higher proportions mentioned this previously and across all Wales sites – see Table 8 overleaf for more details.

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

Favourite things about the site	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
Scenery / views / beautiful/ natural / non-commercial	56	60	62
Walks / paths / trails	28	31	42
Peace / tranquillity / relaxation / atmosphere	27	52	56
Fresh air / being outside	20	14	24
Rivers / creeks / waterways	16	6	10
Exercise / keeping fit	11	17	15
Close to home / convenient / location	8	8	16
Been before / wanted to come again	8	4	12
Lots to see and / or do	6	9	5
Opportunity to spend time with family / friends / family friendly	5	3	6
Wildlife / bird watching	4	4	21
Good on-site facilities / BBQ areas / Gift Shop	3	-	9
Like forests / trees / variety of trees / plants	3	9	16
Clean / well looked-after	3	8	16
Good accessibility	3	-	3
Well signposted / good maps / information boards	3	-	2
Plenty / cheap / other reference to parking	2	-	3
Activities that are good for the children	2	13	9
Something for everyone	2	-	1
Local / industrial history / historical interest	2	-	<1
Remote / away from cars / no traffic	2	-	1
Nothing	1	-	<1
Don't know	-	-	<1

Base: All visitors – Craig y Dinas 2015 (144); Craig y Dinas 2012 (98) All Wales (1,188)

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

- Ideal for dogs / dog friendly / safe for dogs (has dog poo bins)
- Not crowded / not too many people
- Safe environment
- The weather
- Friendly people
- Fishing
- Café / restaurant
- Play area
- Site specific events.

5.5 Areas for improvement

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

Turning firstly to what would enhance their enjoyment of the site. Nearly half of visitors to Craig y Dinas could not think of anything that would add to their enjoyment and only made positive comments (44%). This was significantly higher than was seen in 2012 (31%), but lower than the all Wales average of 53%, meaning there were fewer issues with this individual site in 2015 compared to 2012, but slightly more issues at this site in 2015 compared to all Wales sites in general.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. Most comments related to a need to improve the toilet facilities at the site (28%); this was by far the most frequent complaint received, and much higher than the all Wales average of 8%. However, this was also an issue back in 2012, when 33% of visitors called for an improvement to the toilets – see Table 9 below for more details.

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

Suggested improvements	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
Nothing / general positive comments	44	31	53
Improve toilets / more toilets / shower facilities / changing area	28	33	8
Provide café / catering	8	-	4
More bins / litter bins / recycling bins / less litter	8	10	9
Improve café / catering	7	14	2
Better parking (easier, more, cheaper, free)	6	4	4
More dog poo bins / remove dog poo	3	-	9
Better weather / more sunshine	3	-	2
More seating	2	8	3
Don't know	2	-	1

Base: All visitors – Craig y Dinas 2015 (144); Craig y Dinas 2012 (98) All Wales (1,188)

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

- Improve signage / more maps / better maps
- More information on wildlife / vegetation / area
- Longer opening hours (shop / café / main gates)
- Better access / make more accessible (including disabled access)
- Fewer people / fewer cyclists
- More picnic areas / BBQ / picnic tables and benches
- Improve maintenance of paths / cycle tracks / better surfacing
- Camping / places to stay overnight (lodges)
- Easier / less challenging trails, paths and cycle routes
- On-site pub
- Dog washing facilities
- Drinking water facilities
- Bike shop / more shops.

On a similar note: when asked if there was anything that interfered with their enjoyment of their visit to Craig y Dinas, just over two thirds (65%) reported that nothing had. This was in line with the all Wales average, but much lower than the 2012 figure of 85%, indicating that more than twice the number of people felt that something had interfered with their enjoyment in the most recent survey (35%) compared to the last (15%).

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

Issues with the toilets were again the main issue, mentioned by the highest number of visitors (10%); comments included there not being enough toilets, toilets being closed or out of order, or a lack of changing facilities.

Another 4% had issues with the car park in terms of faulty machines and limited car parking spaces, while the same proportion (4%) considered the signage to be unclear, and that the site needed more signs and more maps. Once again, a lack of litter bins and too much litter around the site was mentioned by visitors (4%) – see Table 10 overleaf.

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

Problem areas	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
Nothing	65	85	68
Toilets – not enough / closed / out of order / cleaner toilets / no changing	10	-	4
Signs unclear / need better signs / more maps	4	2	3
Problems with car parks / faulty machines / limited spaces	4	-	2
Need more litter bins / recycling bins / too much litter	4	3	5
Wet / raining / windy (poor weather)	3	-	8
Too busy / too many kids	3	-	1
Need more sheltered areas / sheltered picnic tables and benches	2	-	<1
Complaints about other visitors	2	-	1
Don't know	-	-	<1

Base: All visitors – Craig y Dinas 2015 (144); Craig y Dinas 2012 (98) All Wales (1,188)

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

- Dogs off leads / loose dogs / don't want dogs around
- Need more seating
- Problems getting around site (e.g. trails closed, no disabled access)
- Dog mess on the paths / in play areas
- Lack of information / education about nature, forest, history
- Couldn't find children's play trails / disappointed with children's play trails
- Poor maintenance of the site (paths, fences, waterways)
- No café
- Some paths are difficult / dangerous (loose shale, steep drops).

6. Site facilities

6.1 Importance of site facilities

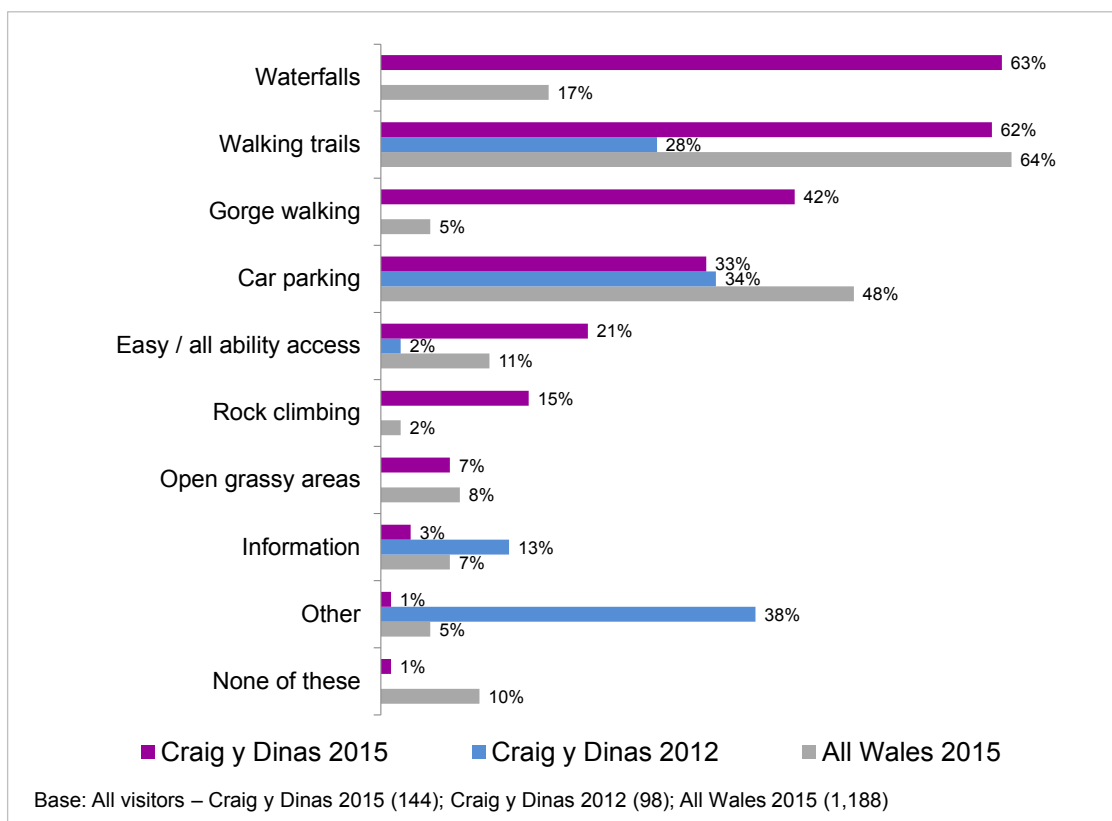
Visitors were presented with a list of facilities available at Craig y Dinas and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

Waterfalls and walking trails were mentioned by the highest proportions of visitors to Craig y Dinas (63% and 62% respectively); waterfalls were not mentioned in the previous survey. As for walking trails; only 28% of visitors said these were important in 2012 (64% for all Wales).

Gorge walking was also mentioned by 42% of visitors in 2015, but not mentioned in 2012; for both waterfalls and gorge walking, the all Wales figures were much lower, although this is a product of the fact that very few sites included within the 2015 research include these two features.

Car parking was mentioned by a third of visitors (33%), which was in line with 2012 data (34%) but lower than the all Wales average of 48%. Another one in five (21%) mentioned easy / all ability access around the site; this was more important at Craig y Dinas than it was across all Wales sites in general (11%), and much more important in 2015 compared to 2012 (2%).

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



Certain other factors (apart from site facilities) were important to around a half of visitors when choosing to come to the site (46%). Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

Meeting up with family and friends was important to nearly one in ten visitors to Craig y Dinas (7%), while 5% specifically mentioned that the site had good facilities, and this was important to their choice to visit.

Smaller proportions talked of being outdoors in the fresh air (4%), that they live locally so it was a convenient place to get to (3%) or that they had taken advantage of warm and sunny weather to visit the forest (2%) – see Table 11 below.

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

	Craig y Dinas 2015 %	All Wales 2015 %
Nothing	54	53
Meeting / visiting with family and friends (bring family)	7	3
Good facilities	5	4
Outdoors / fresh air / open spaces	4	2
Was just passing by / en route / was in the area	3	5
With work / team building / work there	3	1
Live locally / convenient / easy to get to / easy access / close to me	3	5
Friend / family / owner of B&B recommended it / word of mouth	3	2
Specific event (e.g. Race for Life)	2	1
Good weather / sunny / warm	2	3
Wanted to go walking / cycling	2	4

Base: All visitors – Craig y Dinas 2015 (144); All Wales (1,188)

Other factors were mentioned by one or two visitors:

- Good for the children / children like it / can run around and play
- Been before / come here a lot / good memories
- Close to where I am staying (staying visitors) / parents live locally
- Beautiful scenery / views / natural beauty
- Bad weather / wet / cold / windy
- Dog friendly / dogs can come off leads / dog facilities
- A day out / a nice day out / a good day out

- Relaxing / peaceful / tranquil / quiet
- Easy to find / get to (transport links, signposting, shuttle bus to site etc.)
- Good value for money / cheap / free
- Easily accessible / easy to get around (wheelchair access)
- Good parking / cheap / free
- Something different / a change.

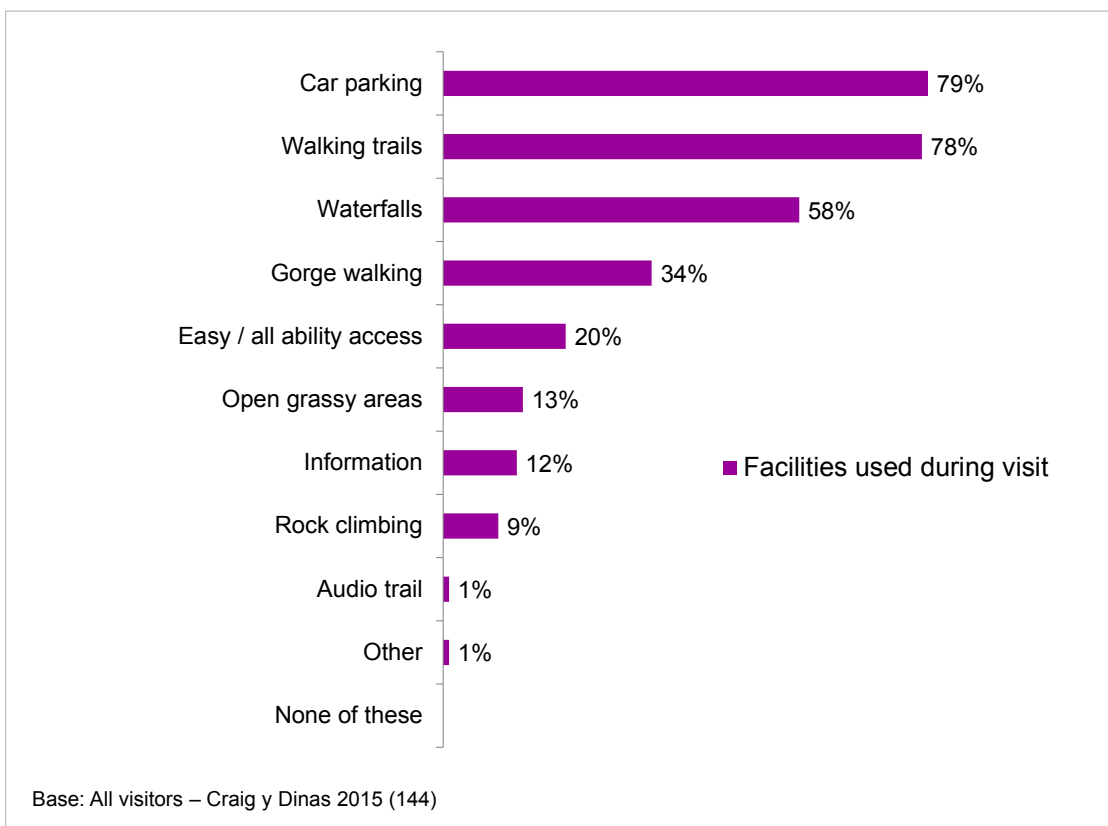
6.2 Facilities used

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

The facilities used reflected to a large extent visitors' views of the importance of facilities. Parking (79%) and walking trails (78%) were used by the highest proportions of visitors, followed by waterfalls (58%).

Gorge walking was mentioned by a third of visitors (34%), while one in five (20%) took advantage of the easy / all ability access around the site. One in ten mentioned the information around the site (12%) or rock climbing (9%), while a very small proportion had used the audio trail through the forest (1%) - see Figure 13 below for more details.

Figure 13: Q15a. Facilities used at Craig y Dinas 2015



6.3 Rating of site facilities

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

The feature that received the highest score was the waterfalls. Seven in ten rated these as ‘excellent’ (72%) whilst most others rated them as ‘very good’ (19%) or good (6%). Gorge walking also received very high scores: two thirds rated this feature as ‘excellent’ (67%), with all remaining users saying this was very good or good (36%). Just under half rated the walking trails as excellent (49%).

The facility that received the least positive rating was the car park: while the majority rated this positively (87% saying ‘excellent’, ‘very good’ or ‘good’), another 12% rated this as ‘fair’ – see Figure 14 below.

Figure 14: Q15b. Rating of Craig y Dinas site facilities (where used) 2015 – main facilities used

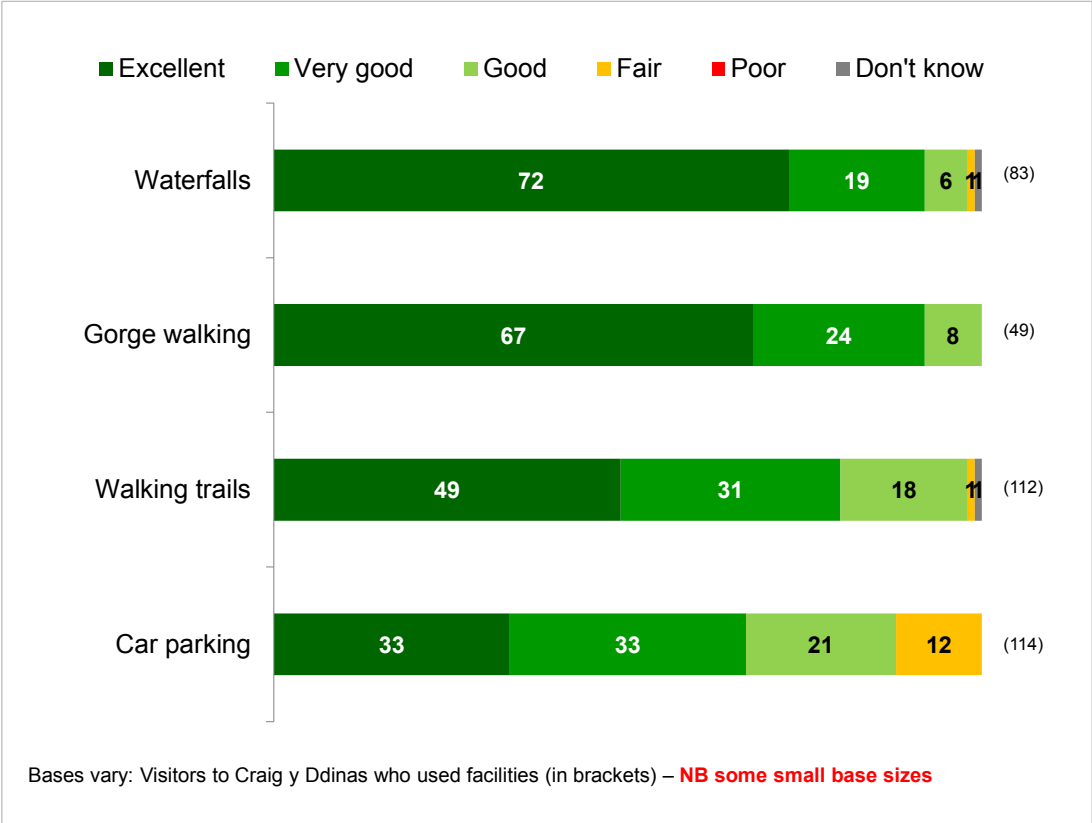


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2015 compared to 2012, where they were mentioned in the previous survey.

Encouragingly, for the two facilities listed, the proportion who gave an 'excellent' rating has increased considerably since the previous research; a 27% increase in excellent ratings for walking trails, and a 24% increase for car parks.

Table 12: Q15b – Proportions rating facilities at Craig y Dinas as 'Excellent' 2014 vs. 2012

Facilities	Craig y Dinas 2015 %	Craig y Dinas 2012 %	% point change
Walking trails	49	22	+27
Car parking	33	9	+24

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 Craig y Dinas 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.

Around a third of visitors had always known about the site, or had heard of it through word of mouth (36% and 33% respectively). Another 18% found out about Craig y Dinas by doing an internet search, while 10% visited a website (other than the NRW or FC websites).

Word of mouth recommendations were higher for Craig y Dinas compared to all Wales sites (21%), and higher than was seen in 2012 (23%). Other sources of awareness included maps (5%), leaflets, guidebooks and Tourist Information Centres (3% for each) and road signs (2%) – see Table 13 below.

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

Sources of information	Craig y Dinas 2015 %	Craig y Dinas 2012 %	All Wales 2015 %
Always known about it / been here before	36	50	52
Word of mouth	33	23	21
Google / other search engine	18	18	7
Websites	10	-	5
Map	5	1	4
Leaflet	3	2	4
Book / guide book	3	-	2
Tourist Information Centre	3	2	2
Road signs	2	-	6
Don't know	1	-	<1

Base: All visitors – Craig y Dinas 2015 (144); Craig y Dinas 2012 (98); All Wales 2015 (1,188)

There were several other sources of information mentioned by one or two respondents:

- Just passing / en route
- TV
- Live locally
- Organised event
- Newspaper
- Organised trip.

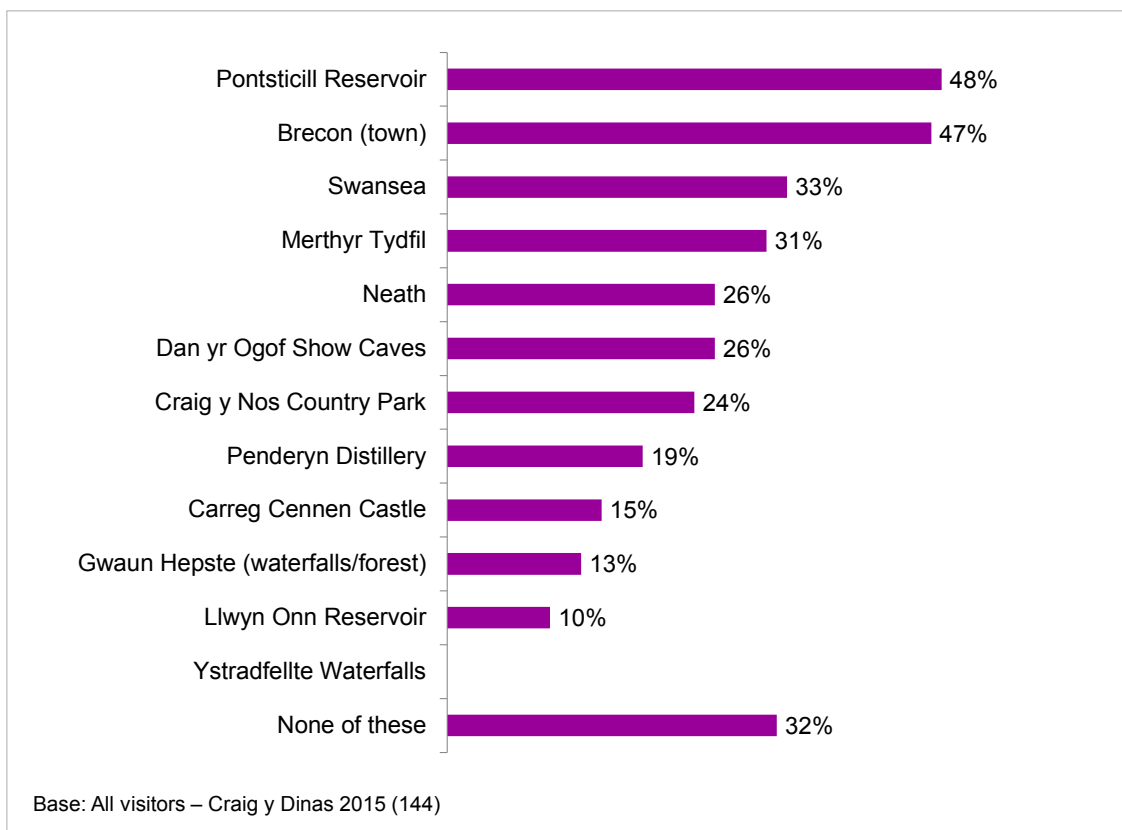
8. Visiting other areas and attractions

Visitors to Craig y Dinas 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 (68%) had visited at least one.

Two specific locations stood out as being visited by the highest proportions (roughly half of visitors for each). These were Pontsticill Reservoir (48%) and Brecon town (47%).

Another third of visitors to Craig y Dinas had also visited Swansea and Merthyr Tydfil (33% and 31% respectively), while a quarter had visited Neath, Dan yr Ogof Show Caves (26% for each) or Craig y Nos Country Park (24%) – see Figure 15 below for more details.

Figure 15: Q19. Other areas / attractions visited 2015



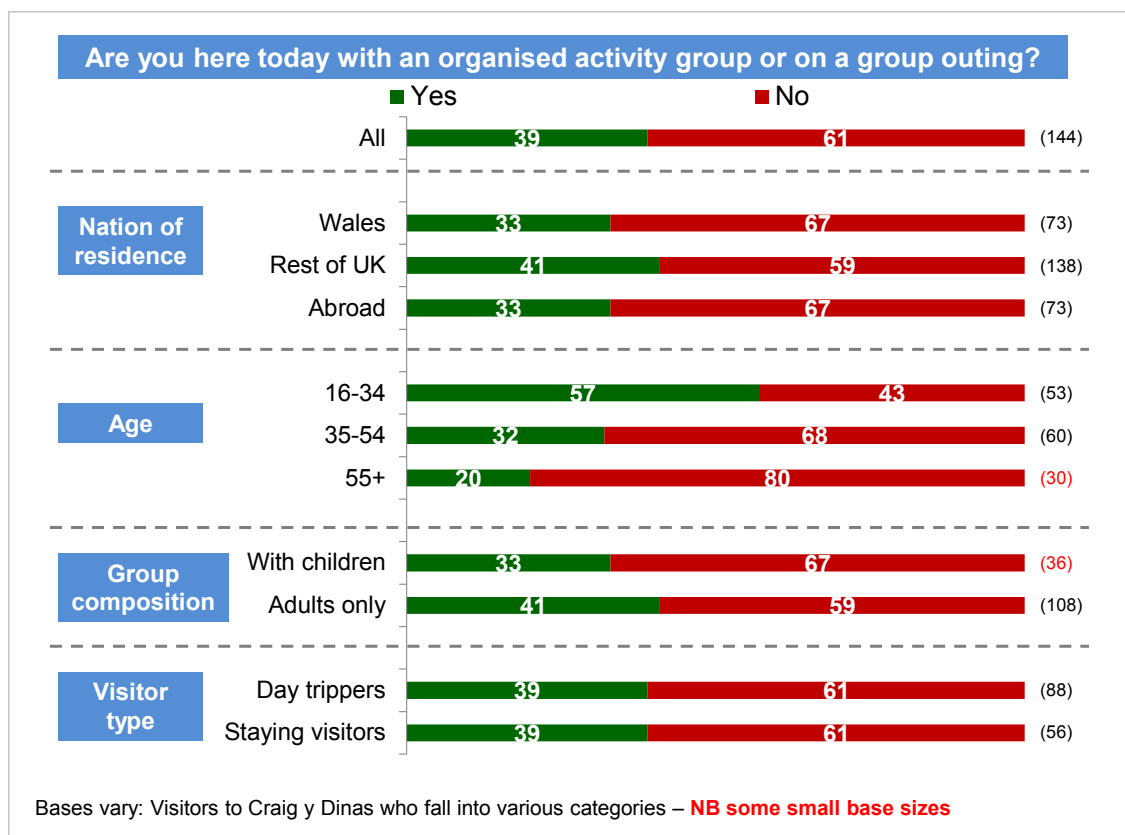
9. Visiting as part of an organised group

When asked if they were visiting Craig y Dinas as part of an organised group, just less than four in ten of visitors reported that they were (39%).

Group visitors were more likely to have travelled from other parts of the UK (41%) than Wales or abroad (33% for each), and were much more likely to be aged 16-34 years (57%) than 35-54 years (32%) or 55+ (20%).


Moreover, visitor groups tended to be adults only (41%); there was no difference according to whether the visitor was a day-tripper or staying as part of a longer holiday (39% for each) – see Figure 16 below.

Figure 16: Q20. Visiting as part of an organised group



Appendix I

Questionnaire

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

ASK ALL

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

- Better parking (easier, more, cheaper, free) 1
- Improve toilets / more toilets / shower facilities / changing area 2
- More activities for children / more play areas 3
- More trails / paths / cycle tracks 4
- Improve signage / more maps / better maps 5
- Improve café / catering 6
- More dog poo bins / remove dog poo 7
- More bins / litter bins / recycling bins 8
- Longer / more challenging trails, paths and cycle routes 9
- More seating A
- More picnic areas / BBQ / picnic tables and benches B
- Improve maintenance of paths / cycle tracks / better surfacing C

Other (please specify) (79-82m)

- Nothing L
- Don't know M

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

- Wet / raining / windy (poor weather) 1
- Car parking expensive 2
- Signs unclear / need better signs / more maps 3
- Problems with car parks 4
- Poor service in café / long queues / inconvenient opening hours 5
- Too busy 6
- Dogs off leads / loose dogs / don't want dogs around 7
- Toilets – not enough / closed / out of order 8
- Need more litter bins / recycling bins / too much litter 9
- Dog mess on paths / in play areas A

Other (please specify) (87-90m)

- Nothing L
- Don't know M

ASK ALL

SHOWCARD F

Q11 How would you rate the site in terms of how safe and welcoming it feels?
SINGLE CODE

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

Don't know / not sure

(95)

1 }
2 } **Q12**
3 }
4 }
5 }
6 }

7 → **Q13**

ASK Q12 IF CODED 1-6 AT Q11

Q12 What are the reasons for your rating? **PROBE** Anything else?
DO NOT PROMPT – CODE ALL MENTIONED

- The scenery / views / beautiful environment
- Peaceful / pleasant / tranquil / relaxing
- Fresh air / open space
- Safe environment generally
- Good, safe place for the kids to play and run around
- Clean / tidy / well maintained / litter free
- Well signposted / good maps / info boards
- Well laid out / well organised / good set up
- Other visitors here are friendly
- Good quality facilities or amenities
- Good provision of paths, trails and tracks
- Friendly / helpful staff or rangers
- Live locally / convenient / easy to get to

(96-99m)

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

Other (please specify)

(100-103m)

Don't know

M

CRAIG Y DDINAS

ASK ALL

SHOWCARD G2

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

CODE ALL MENTIONED

		(105-108m)
A	Audio Trail	5
B	Car parking	C
C	Easy / all ability access	H
D	Gorge Walking	O
		(109-112m)
E	Information available / interpretation	5
F	Open grassy areas	9
G	Rock climbing	F
H	Walking trails	O
		(113-116m)
I	Waterfalls	1

None of these
Don't know

M
N

Q14 Can you tell me about anything else that might have influenced your decision to visit here today, other than the site facilities you have just mentioned?

PROBE Anything else?

RECORD VERBATIM

Nothing
Don't know

(117-120m)

(121-124m)

M
N

CRAIG Y DDINAS

ASK ALL

SHOWCARD G2 AGAIN

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

SHOWCARD H

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

FOU: (140-231 FOR Q15)

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

ASPECTS USED		Q15a COL. A CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(125-128m)								
A	Audio Trail	5	1	2	3	4	5	6	7	(144)
B	Car parking	C	1	2	3	4	5	6	7	(151)
C	Easy / all ability access	H	1	2	3	4	5	6	7	(156)
D	Gorge walking	O	1	2	3	4	5	6	7	(163)
		(129-132m)								
E	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
F	Open grassy areas	9	1	2	3	4	5	6	7	(172)
G	Rock climbing	F	1	2	3	4	5	6	7	(178)
H	Walking trails	O	1	2	3	4	5	6	7	(187)
		(133-136m)								
I	Waterfalls	1	1	2	3	4	5	6	7	(188)
OTHERS (WRITE IN)										
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()

None of these
 Don't know

M
 N

ASK ALL

SHOWCARD H AGAIN

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

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

Don't know / not sure

(235)

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

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

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

(236)

SHOWCARD I

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

WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND £
IF NONE, DON'T KNOW OR REFUSED, TICK APPROPRIATE BOX

ITEMS	£	Nothing	DK	Ref.	
Food and drink		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(237-240)
Activities available at this site		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(241-244)
Parking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(245-248)
Souvenirs / gifts		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(249-252)
Hiring equipment such as boats, bikes or horses		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(253-256)
Anything else		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	(257-260)

SHOWCARD J

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

WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE, DON'T KNOW OR REFUSED, TICK APPROPRIATE BOX

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

CRAIG Y DDINAS

FOU: (335-369 FOR Q19)

ASK ALL

SHOWCARD K2 (W)

Q19 Looking at this card, can you tell me which, if any, of these places you have visited in the last 12 months?

CODE ALL MENTIONED

Brecon (town)
Carreg Cennen Castle
Craig y Nos Country Park
Dan yr Ogof Show Caves
Gwaun Hepste (waterfalls/forest)
Llwyn Onn Reservoir
Merthyr Tydfil (town)
Neath (town)
Penderyn Distillery
Pontsticill Reservoir
Swansea
Ystradfellte Waterfalls

None of these
Don't know

(340-343m)

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

L
M

FOU: (370-410 FOR Q20)

Q20 Are you here today with an organised activity group or on a group outing?

Yes
No

Don't know

(376)

1
2

3

ASK ALL

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

Q21 INTERVIEWER RECORD GENDER

- Male
- Female

(415)
1
2

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

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

Refused

(416)
1
2
3
4
5
6
7

SHOWCARD M

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

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

Refused

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

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

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

Job title _____

Position / Grade _____

- AB
- C1
- C2
- DE

Refused

(418)
1
2
3
4
5

Q25	Do you have any children aged 15 or under living in your household?	(420)
	Yes	1
	No	2
	Refused	3
Q26	Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months? INCLUDES PROBLEMS RELATED TO OLD AGE	(421)
	Yes – limited a lot	1
	Yes – limited a little	2
	No	3
	Refused	4
SHOWCARD N		
Q27	Which of these best describes your ethnic origin? SINGLE CODE	(422)
	White British	1
	White Welsh	2
	White Irish	3
	White East European	4
	White other European	5
	Any other White background	6
	Caribbean	7
	African	8
	Any other Black background	9
	Indian	A
	Pakistani	B
	Bangladeshi	C
	Any other Asian background	D
	White and Black Caribbean	E
	White and Black African	F
	White and Asian	G
	Any other Mixed background	H
	Chinese	I
	Other (please specify) _____	J
	Refused	Z

ASK Q28a AT ENGLAND SITES ONLY

SHOWCARD O (E) AND PURPLE ENGLAND MAP

Q28a Which of the following regions do you live in?
SINGLE CODE

- North East England
- Yorkshire & Humberside
- North West England
- West Midlands
- East Midlands
- East of England
- Greater London
- South East England
- South West England

- Wales
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(425)

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

- A
- B
- C
- D

X

Z

ASK Q28b AT WALES SITES ONLY

SHOWCARD O (W) AND WALES MAP

Q28b Which of the following regions do you live in? **(WALES)**
SINGLE CODE

- North Wales
- Mid / West Wales
- South West Wales
- Valleys
- South East Wales

- England
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(426)

- 1
- 2
- 3
- 4
- 5

- 6
- 7
- 8
- 9

X

Z

Q29 So we can map where visitors have come from, can I please have your postcode?
 Please be assured that this information will only be used for analysis purposes and will not be used to identify individuals.

ENSURE POSTCODE IS COLLECTED IN FULL WHERE POSSIBLE, OR AS MUCH OF POSTCODE AS RESPONDENT WILL PROVIDE . LEADING PART OF POSTCODE IS MOST IMPORTANT

(427)	(428)	(429)	(430)	(431)	(432)	(433)

Respondent Name:					
Address:					
Telephone number:					
THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.					
<i>Interviewer Declaration:</i> I declare that I have conducted this interview face to face with the above named person (who is unknown to me) according to your instructions:					
Signature				Date of interview:	
				(435)(436)(437)(438)	
WRITE IN YOUR INTERVIEWER NUMBER →				(439)	(440)
				(441)	(442)
B01326-3	F.O.U (BACK CHECKS)		Accompanied	Yes 1	Supervisor signature
				No 2	

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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