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Research Report

Quality of the
Visitor Experience:
Cwmcarn Forest
Drive 2013



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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 2013, a total of 2,659 interviews were conducted: 1,545 in England and 1,114 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 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

As an aside from the main research programme, an additional survey was undertaken amongst visitors on the Forest Drive at the Cwmcarn Forest. This report summarises the findings from these 164 additional interviews. Throughout the report, where possible, comparisons have been made to the previous research conducted in 2011, and the all Wales average (aggregated data from the 7 main sites surveyed in 2013).

Please note that the 2011 research took place at the Cwmcarn Forest Visitor Centre and its associated car parks, whereas interviewing for the 2013 took place along Cwmcarn Forest Drive.

1.2 Cwmcarn Forest Drive and site

Cwmcarn Forest is one of UK's largest urban forests. Its nearest town or village is Crosskeys. Once a mining area, the Forestry Commission started planting trees in Cwmcarn in 1922 transforming the hillsides into peaceful forests with impressive views and the Nantcarn valley has become a haven for people and wildlife.

Cwmcarn is now a beautiful mature forest of larch and pine with the nationally famous seven mile Forest Drive running through it which provides beautiful woodlands with staggering views. There are seven car parks and themed picnic sites along the Drive each offering something different for the visitor from sculptures to play areas to barbeque facilities. The Forest Drive and Visitor Centre offer something for all the family. The Centre is run by Caerphilly County Council and provides a place to stock up on refreshments and gifts as well as finding out about what you can do in the area.

Cwmcarn Forest has a wide variety of activities available to visitors, including a trail of magical wood carvings, a fishing lake, barbeque sports, Cwmafon Heritage Trail (a 3 hour walk through the historic scenery), mountain biking (including an exhilarating single-track trail), Sirhowy Country Park which inhibits the picnic area and Ruperra Castle.

1.3 Perceptions of the Forest Drive

Perceptions of Cwmcarn Forest Drive as a place to visit were very positive. This was also the case across all the Welsh sites. Nobody interviewed at Cwmcarn FD gave a negative rating.

Nearly two thirds (62%) rated the Forest Drive as 'excellent', which was equal to the all Wales finding (62%). A further 29% gave a 'very good' rating (32% overall).

1.4 Strengths of the Forest Drive and site

Two favourite things about the Forest Drive stood out: the most mentioned, by nearly nine in ten, was the beautiful scenery and the views (87%). This compares to 75% saying the same of the forest site, and only 28% of visitors in 2011: the equivalent 2013 all Wales figure was 57%.

Peace, tranquillity and relaxation at Cwmcarn Forest Drive were mentioned by three quarters of visitors (76%), and 57% of those visiting the rest of the site. Only 23% of visitors to the Cwmcarn forest site in 2011 mentioned this (51% all Wales in 2013).

Around half of visitors to the Forest Drive liked the fresh air and open space (55%). Roughly the same proportions spoke of there being lots to see and do and enjoying the weather (51% for each); it being a safe environment and being clean and well looked after (49% for each).

Many other positive comments were made by sizable proportions of visitors to the Forest Drive. On the whole, many more visitors were mentioning specific aspects that they liked about both the Forest Drive and the site as a whole in 2013 compared to 2011. The exception to this concerned the cycle trails: in 2011, 70% of visitors to the Cwmcarn forest site said that they liked the cycle trails, but in 2013 this had dropped to just 11%.

1.5 Visitor profile

Only 32% of visitors to Cwmcarn FD were first time visitors. This was much higher than was seen at Cwmcarn site in 2011 (15%) and also slightly higher than the all Wales average of 25%.

Just over half of visitors to Cwmcarn FD travelled for less than three hours to get there (55%). This was considerably less than the previous survey finding (82%) but in line with the all Wales average (56%).

The gender profile of visitors to the Forest Drive was more evenly split than was seen for other forest sites in Wales: 48% of visitors to Cwmcarn FD were male (compared to 59% all Wales) and 52% were female (compared to 41% all Wales).

There were considerably more visitors from the 25-44 years age group visiting the Forest Drive (70%) compared to the forest sites in Wales (40%), and far fewer visitors aged 45+ (25% compared to 54% all Wales).

Cwmcarn Forest Drive visitors tended towards the ABC1 socio economic groups (72%): this was also the case across all Wales (70%). There were slightly more visitors who were employed (85%) compared to all Wales (74%), and fewer who were retired (5% compared to 19% all Wales), no doubt reflecting the younger age profile. Moreover, at Cwmcarn FD, 68% had children living at home, compared to only 30% of visitors to the other forest sites in Wales.

The overwhelming majority of visitors to Cwmcarn FD were White British / Welsh / Irish (93%), although more visitors described their ethnicity as White Other (4%) and black / Asian / mixed (5%) compared to the forest sites in Wales (2% and 1% respectively).

Only 5% of visitors to Cwmcarn Forest Drive spoke Welsh: this was significantly lower than the all Wales average of 20% Welsh speakers.

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.

Each year in Wales, around 4 million visits are made to the estate including 0.5 million to sites with visitor centres. 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 can contribute to physical, mental and emotional well-being of visitors. Well-managed, welcoming woodlands provide 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 and woodlands. 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 forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed; 14 per year (7 in each country). All selected sites in England are categorised as being high usage, while sites in Wales consist of a combination of medium and high usage sites.

Table 1 below details the sites surveyed in 2013, 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
Alice Holt	241	Afan Forest Park (H)	192
Cannock Chase	223	Brechfa (M)	138
Cardinham Woods	237	Gwydyr (M)	147
Grizedale	211	Hafren (M)	130
Sherwood Pines	207	Moel Famau (M)	190
Wendover Woods	216	Newborough (H)	182
Westonbirt	210	Whitestone (M)	135
TOTAL	1,545	TOTAL	1,114

* 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 will run from March to October each year. However, during 2013, interviewing was concentrated in August, September and October, with a small number of interviews conducted in July and November.

An additional survey of 164 visitors to Cwmcarn Forest Drive was undertaken between 24th August and 6th October 2013.

2.3 Report

This report summarises the results of the interviews undertaken at Cwmcarn Forest Drive in 2013, and includes individual scores on key visitor measures. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from the main 7 sites) and previous findings from the 2011 research, where possible.

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 Cwmcarn Forest Drive. Table 2 overleaf details the profile of visitors to the Forest Drive, compared to the profile of visitors to all forest sites surveyed in Wales in 2013.

The gender profile of visitors to the Forest Drive was more evenly split than was seen for other forest sites in Wales: 48% of visitors to Cwmcarn FD were male (compared to 59% all Wales) and 52% were female (compared to 41% all Wales).

There were considerably more visitors from the 25-44 years age group visiting the Forest Drive (70%) compared to the forest sites in Wales (40%), and far fewer visitors aged 45+ (25% compared to 54% all Wales).

Cwmcarn Forest Drive visitors tended towards the ABC1 socio economic groups (72%): this was also the case across all Wales (70%). There were slightly more visitors who were employed (85%) compared to all Wales (74%), and fewer who were retired (5% compared to 19% all Wales), no doubt reflecting the younger age profile of visitors to the Forest Drive.

Also, another reflection of the younger age profile was the proportion of visitors who had children in the household: at Cwmcarn FD, 68% had children living at home, compared to only 30% of visitors to the other forest sites in Wales.

The overwhelming majority of visitors to Cwmcarn FD were White British / Welsh / Irish (93%), although there were more visitors describing their ethnicity as White Other (4%) and black / Asian / mixed (5%) compared to the forest sites in Wales (2% and 1% respectively).

Only 5% of visitors to Cwmcarn Forest Drive spoke Welsh: 1% fluently and 4% non-fluently. This was significantly lower than the all Wales average of 20% Welsh speakers (8% fluent, 12% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2013

		Cwmcam FD %	All Wales %
Gender	Male	48	59
	Female	52	41
Age	16 - 24	4	6
	25 - 34	32	15
	35 – 44	38	25
	45 – 54	13	21
	55 – 64	7	18
	65+	5	15
Social class	AB	39	40
	C1	33	30
	C2	11	19
	DE	17	9
	Refused	-	2
Working status	Full-time employee (30+ hours per week)	71	60
	Part-time employee (<30 hours per week)	10	8
	Self-employed	4	6
	Full-time education	1	2
	Unemployed	2	1
	Permanently sick / disabled	1	1
	Retired	5	19
	Looking after home	2	2
	Other	1	<1
	Refused	1	1
Limiting illness	Yes – limited a lot	1	2
	Yes – limited a little	2	3
	No	97	94
	Refused	-	2
Children in household	Yes	68	30
	No	31	69
	Refused	1	1
Ethnicity	White – British / Welsh / Irish	93	96
	White – Other	4	2
	Black / Asian / Mixed	5	1
	Refused	-	1
Welsh speaker	Yes	5	20
	No	95	80

Base: All visitors – Cwmcam FD (164); All Wales (1,114)

3.2 Group profile

3.2.1 Size of group

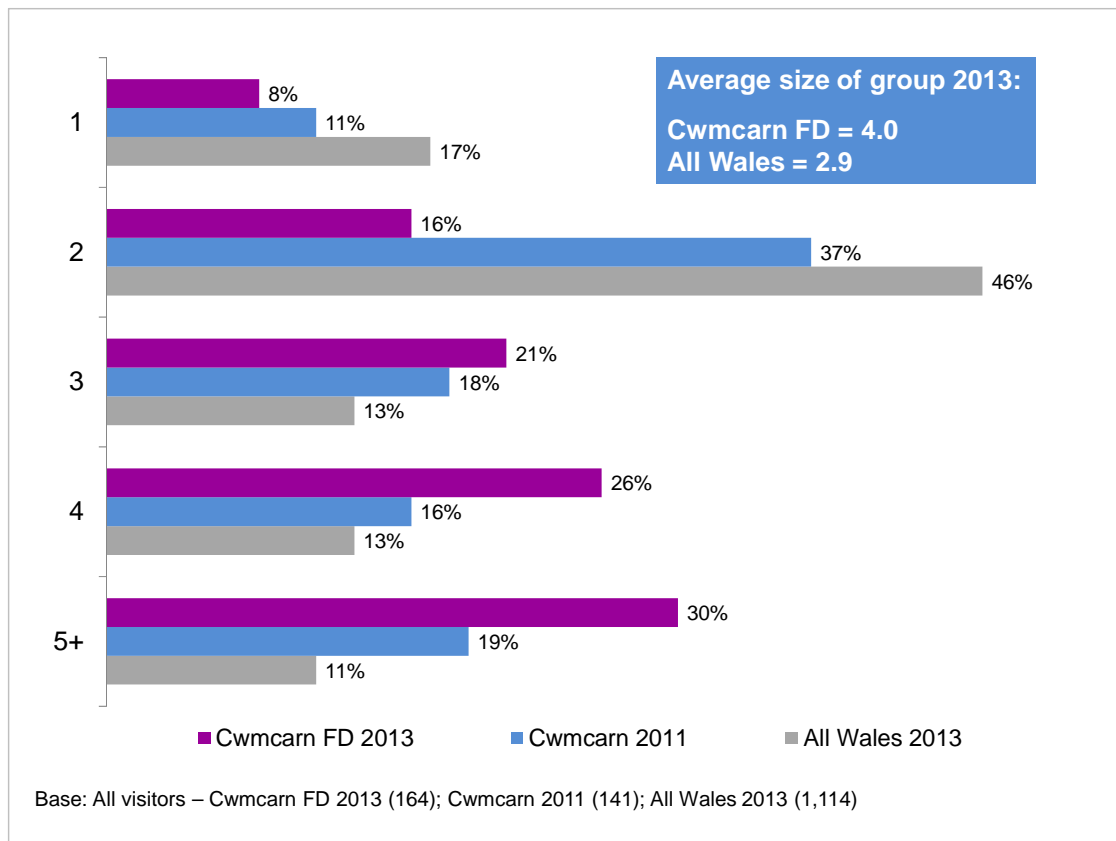
Group sizes were much larger at Cwmcarn FD (averaging 4.0 people) compared to the all Wales sample (which averaged 2.9 people).

Reflecting this higher average group size, nearly three in ten of Cwmcarn FD visitor groups (30%) consisted of more than five people. This was considerably higher than the previous Cwmcarn site research in 2011 (19%) and the 2013 all Wales average (11%). Moreover, nearly one in ten visitors had eight or more people in their group:

- 5 people – 12%
- 6 people – 5%
- 7 people – 4%
- 8+ people – 9%.

A fifth (21%) of visitor groups consisted of three people, while a quarter consisted of four people (26%). The remaining quarter (24%) were smaller visitor groups of one or two people – this was significantly different from the group sizes seen at Cwmcarn site in 2011 (48% one or two visitors) and the 2013 all Wales figure (63% one or two visitors) – see Figure 1 overleaf.

Figure 1: Q1. Total size of the group



3.2.2 Composition of group

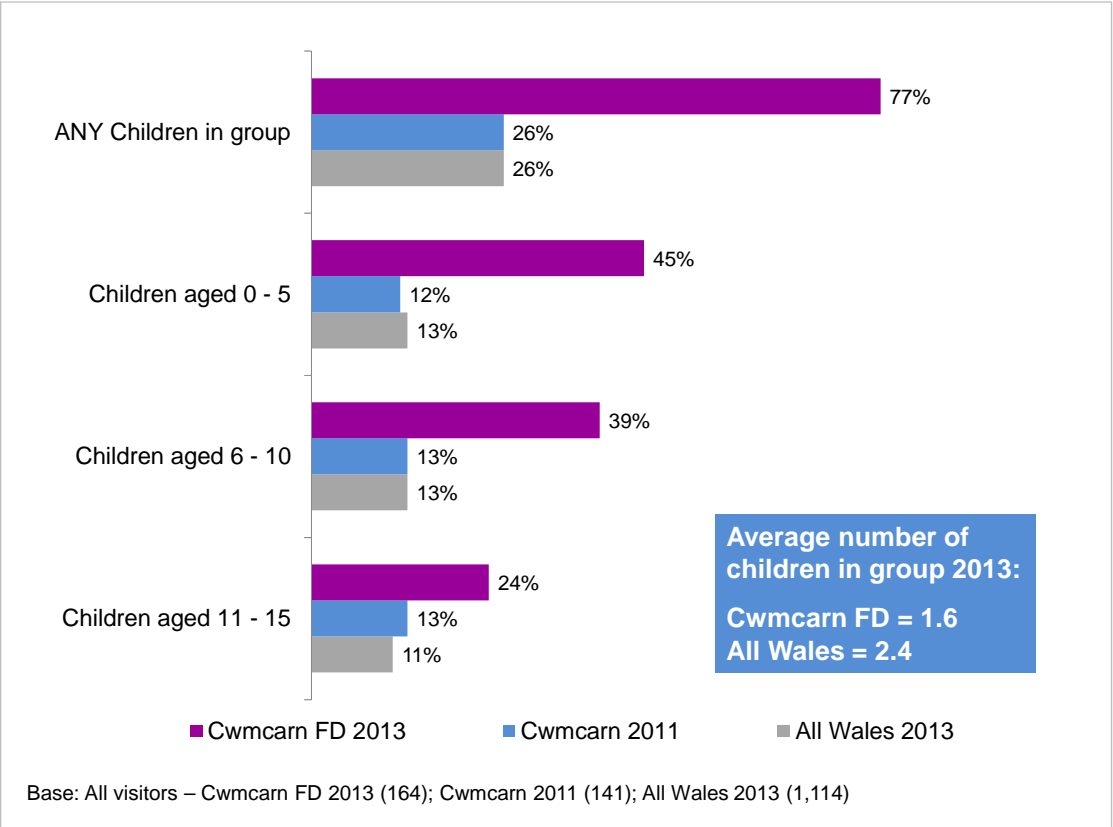
It was mentioned previously that a significantly higher than average proportion of visitors to Cwmcarn Forest Drive had children living at home (68%). It is therefore unsurprising that a significantly higher proportion of visitor groups contained children (77%) compared to both the previous research and the all Wales average (26% for both).

Nearly half of visitors to the Forest Drive were accompanied by children aged 0-5 years (45%), while two in five (39%) were accompanied by children aged 6-10 years. Both of these figures were significantly higher than the 2011 and all Wales equivalents, when approximately one in six visitors were accompanied by children aged 0-5 years or 6-10 years.

Around a quarter of visitor groups contained children aged 11-15 years (approximately double the 2011 and all Wales figures).

Interestingly, while the proportion of visitors accompanied by children was significantly higher than average, the mean number of children within each visitor group was much lower (1.6 for Cwmcarn FD compared to 2.4 all Wales) – see Figure 2 below.

Figure 2: Q1. Composition of group



4. Profile of visit

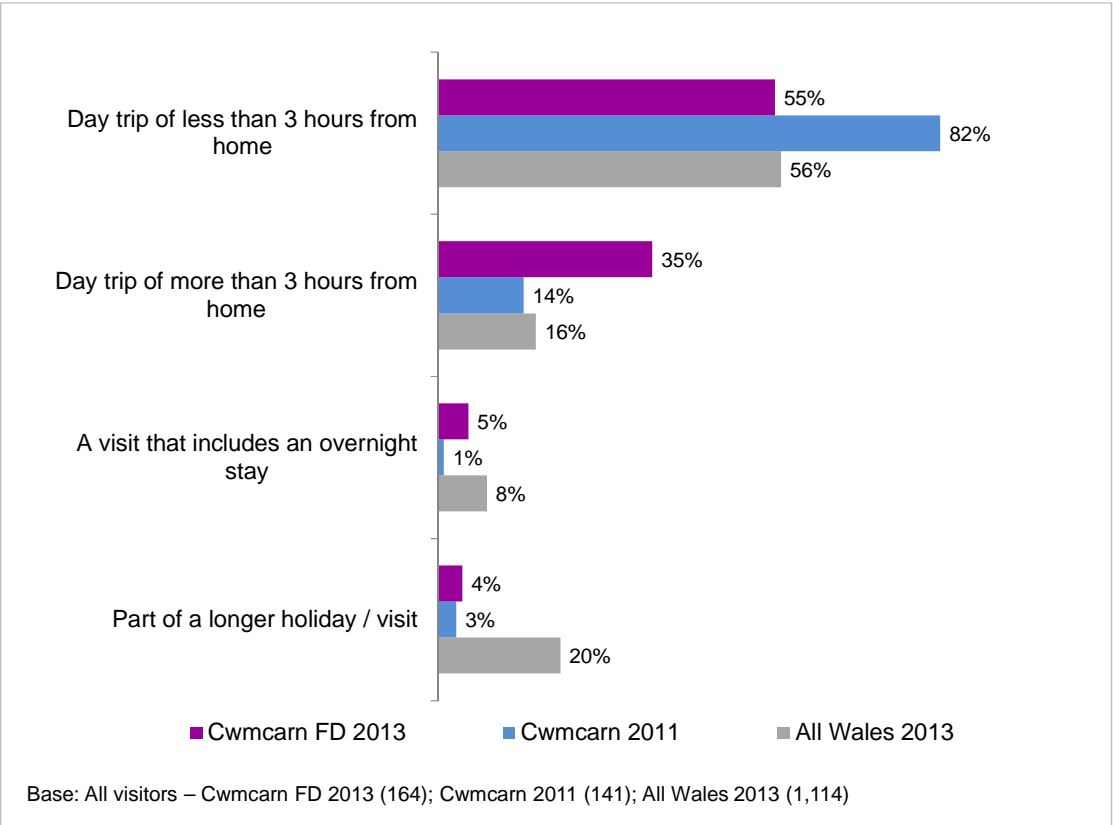
4.1 Type of visit

Just over half of visitors to Cwmcarn FD travelled for less than three hours to get there (55%). This was considerably less than the previous survey finding (82%) but in line with the all Wales average (56%).

A third of visitors had travelled more than three hours from home on a day trip to Cwmcarn FD (35%): this was higher than both the previous research (14%) and the all Wales average (16%). Day trips overall accounted for 90% of the visits to Cwmcarn FD, compared with an all Wales average of 72% (96% in 2011).

Only one in ten visitors to Cwmcarn FD (9%) were staying in the vicinity of the Forest Drive overnight or as part of a longer holiday, compared with an all Wales average of 28%. This figure, however, is double the number of staying visitors recorded in 2011 (4%) – see Figure 3 below.

Figure 3: Q2. Type of visit



Amongst the seven individuals who were staying as part of a longer holiday or visit:

- 3 were staying within 5 miles of the site
- 3 were staying between 11 – 20 miles away from the site
- 1 was staying farther than 20 miles away from the site.

4.2 Visitor origin

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

The vast majority of visitors to the Forest Drive were resident in Wales (85%), with most of these living in the South East Wales region (55% of all visitors). A further 39% of all visitors lived in the Welsh Valleys, while only 1% lived in another area of Wales.

Only 15% of visitors travelled from outside of Wales to visit the Forest Drive (compared to 41% for other forest sites in Wales) - Table 3 below and Figure 4 overleaf provide more details.

Table 3: Visitor origin 2013

		Cwmcarn FD	All Wales
		%	%
Home region	North Wales	-	23
	Mid & West / SW Wales	1	25
	Valleys	29	2
	South East Wales	55	7
	Outside of Wales	15	43
Home nation	Wales	85	57
	Rest of UK	15	41
	Abroad	-	1

Base: All visitors – Cwmcarn FD (164); All Wales (1,114)

Figure 4: Map of visitor origin for Cwmcam Forest Drive



4.3 Frequency of visits

4.3.1 First-time visitors

In 2013 only 32% of visitors to Cwmcarn Forest Drive were first time visitors. This was much higher than was seen at the Cwmcarn site in 2011 (15%) and also slightly higher than the all Wales average of 25% who said they had never visited their respective forest sites before.

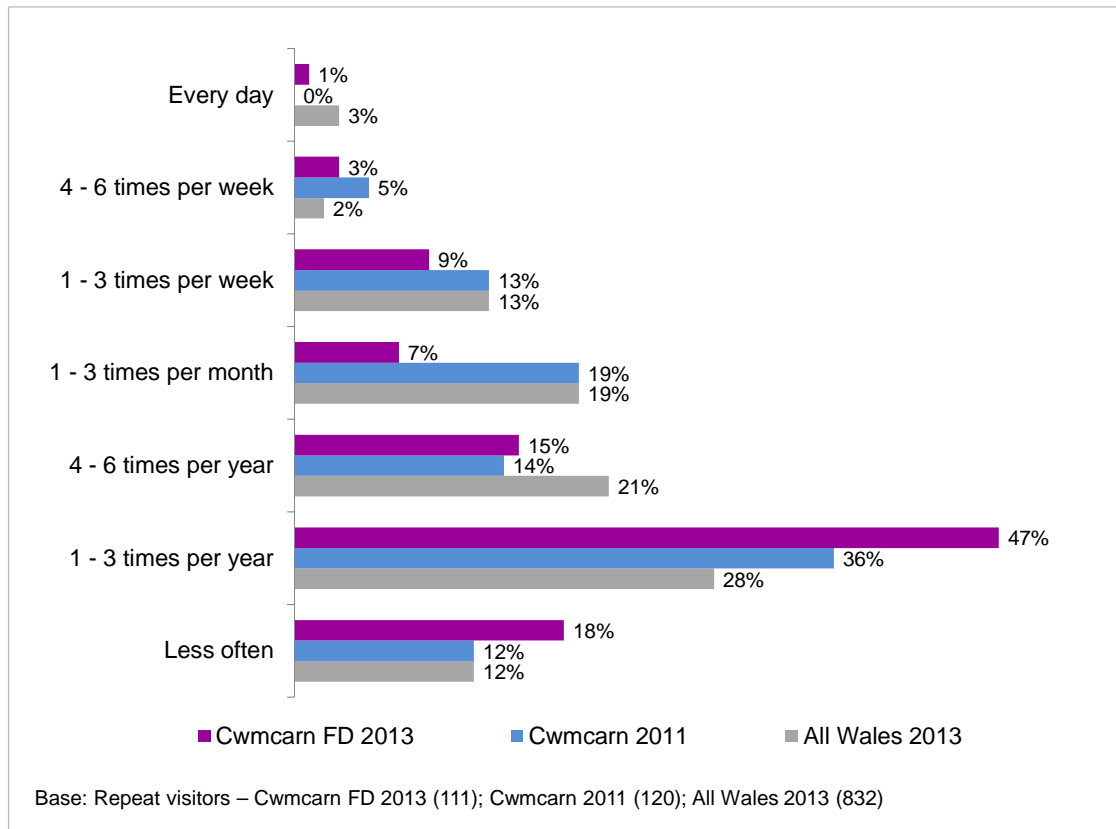
4.3.2 Repeat visitors

Focussing on repeat visitors (68% of the sample), around one in ten of these visitors (13%) went to Cwmcarn Forest Drive on a regular basis (at least once a week): this was slightly lower than seen for the previous research at the Cwmcarn site, and also the all Wales average (18% for both).

In the previous research, a fifth (19%) of visitors to the Cwmcarn site were going to the forest between 1-3 times a month: the same proportion was visiting other forest sites in 2013 from the all Wales sample of repeat visitors (19%). However, only 7% of repeat visitors to Cwmcarn Forest Drive were visiting 1-3 times a month.

Almost half visitors to the Forest Drive (47%) went there between 1-3 times a year: visitors to the Cwmcarn site in 2011 who visited 1-3 times a year accounted for 36% of repeat visitors (28% all Wales average). Around one in five visitors to the Forest Drive (18%) visited less frequently than this (12% for both the 2011 research and 2013 all Wales average) - see Figure 5 overleaf.

Figure 5: Q5. Frequency of visits (where visited the site before)



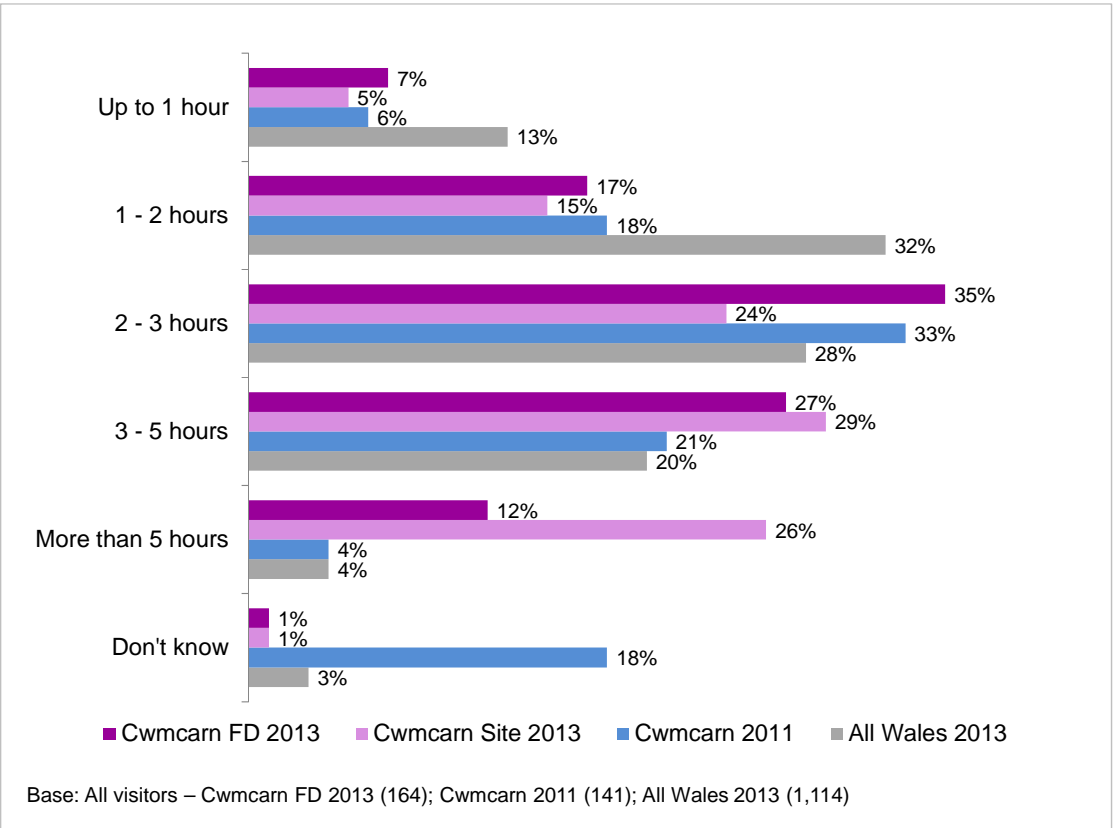
4.4 Length of visit

On the whole, visitors to the Cwmcarn forest site intended to stay an average of 3 hours and 38 minutes at the whole site, with 2 hours and 23 minutes being spent on the Forest Drive itself.

The average length of stay at the site in 2011 was 2 hours and 40 minutes, while the average length of stay at other forest sites across Wales was 2 hours and 22 minutes. Therefore, visitors intended to stay considerably longer at the Cwmcarn site as a whole than in previous years.

The changing lengths of time visitors spent at the site can be seen below, with the most marked increase in time at the site occurring in those spending more than 5 hours there (up from 4% in 2011 to 26% in 2013) – see Figure 6 below.

Figure 6: Q7a/Q7b. 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 had taken part in during their visit to the Forest Drive and to other areas of the site. 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).

The most popular activity at the Forest Drive was having a picnic or barbeque (60%), followed by using the play area (55%) and admiring the views (40%). Around half (48%) of visitors to the Forest Drive took part in walking activities, with roughly equal proportions walking on (28%) and off the trails (20%).

At the forest site itself, around three in ten visitors took part in walking (37%), admiring the views (33%), having a picnic / barbeque or using the play area (29% for each).

The proportion of visitors taking part in cycling activities at Cwmcarn site decreased significantly between 2011 and 2013: in 2011, 77% of the visitors interviewed had cycled (on or off the trails), while in 2013 this had reduced to just 6%. The all Wales average was 22% of visitors taking part in cycling activities.

Conversely, the proportion taking part in walking activities increased somewhat, from 11% in 2011 to 37% in 2013. This figure, however, was still significantly lower than the all Wales average of 73% - see Table 4 overleaf.

Table 4: Q6a/Q6b - Activities taken part in along Forest Drive and at site

	Cwmcarn FD 2013 %	Cwmcarn Site 2013 %	Cwmcarn Site 2011 %	All Wales 2013 %
Cycling / mountain biking off trails or tracks	-	5	17	8
Cycling on forest roads, tracks or trails	-	4	76	19
TOTAL CYCLING	-	6	77	22
Walking on a sign-posted trail	28	20	8	48
Walking but not following sign-posts	20	15	5	22
Dog walking	12	10	6	30
TOTAL WALKING	48	37	11	73
Picnic or barbeque	60	29	6	15
Using the play area	55	29	11	22
Admiring the views	40	33	4	22
Seeing something in the forest	26	13	1	3
Nature / natural history visit	12	6	1	3
Photography	9	5	3	8
Bird watching	8	5	2	4
Forest drive / driving around the trails	2	4		1
Running / jogging	1	-	1	3
Organised trip / event	1	-	-	1
Using the café / restaurant / other catering	-	7	12	7
Using the Visitor Centre	-	2	6	3
Fishing	-	1	-	<1
None of these	1	3	-	<1

Base: All visitors – Cwmcarn FD 2013 (164); Cwmcarn Site 2011 (141); All Wales 2013 (1,114)

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

5. Perceptions of the Forest Drive and site

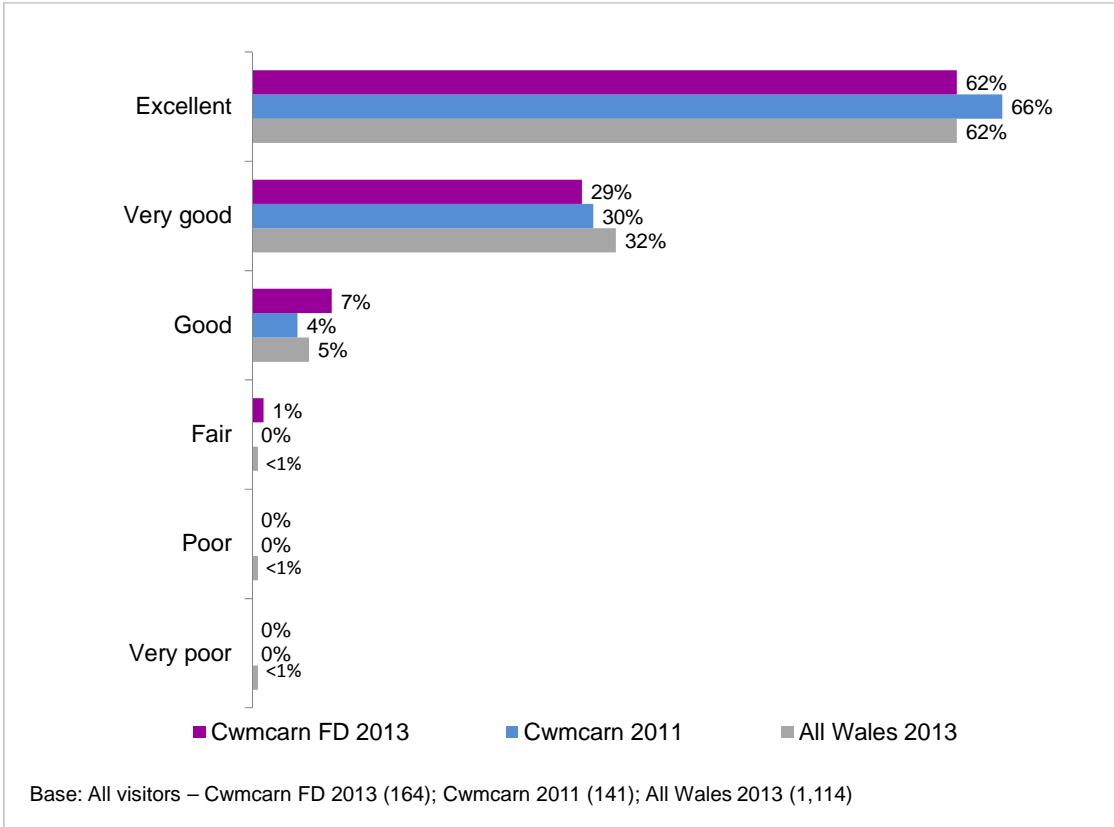
5.1 Overall rating of the Forest Drive as a place to visit

Perceptions of Cwmcarn Forest Drive as a place to visit were very positive. This was also the case across all the Welsh sites. Nobody interviewed at Cwmcarn FD gave a negative rating.

Nearly two thirds (62%) rated the Forest Drive as ‘excellent’, which was equal to the all Wales finding (62%). A further 29% gave a ‘very good’ rating (32% overall).

The previous survey in 2011 rated the site itself: in this case, 66% gave an ‘excellent’ rating, 30% gave a ‘very good’ rating and 4% gave a ‘good’ rating. Nobody gave a poor rating to the site itself in 2011 – see Figure 7 below.

Figure 7: Q10. Rating of the Forest Drive as a place to visit



Those visitors who were able to rate the Forest Drive were asked why they gave that rating. The question was unprompted and visitors could mention more than one aspect of the Forest Drive.

Table 8 below details the comments provided by 1% or more of the sample, and shows the responses received from those visitors giving a positive rating (excellent, very good, good) for the Forest Drive.

The beautiful scenery and views at Cwmcarn FD were by far the most preferred aspects of the area, mentioned by over half of visitors (55%). This was followed by the peace and tranquillity of the drive (25%) and that it was a good and safe place for the kids to play (20%).

Around one in ten visitors to the Forest Drive said that the area was clean and well maintained (10%), that there was a good provision of tracks and trails, and that it was convenient to get to because they lived locally (9% for each).

However, there were a few negative comments received from those who positively rated the Forest Drive, mainly concerning the zip wires that were in need of repair (11%) - see Table 5 below for more details on the comments provided.

Table 5: Q11 – Reasons for giving a positive rating of the Forest Drive as a place to visit – main mentions

	Cwmcarn FD 2013 %
The scenery / views / beautiful environment	55
Peaceful / pleasant / tranquil / relaxing	25
Good place for the kids to play / safe for kids	20
Lots to see and do	16
General positive comments	12
Zip wires need repairing	11
Clean / tidy / well maintained	10
Good provision of paths / trails and tracks	9
Live locally / convenient / easy to get to	9
Fresh air / open space	7
Good children's play area	7
Good picnic / barbeque facilities	6
Poor toilet facilities	6
Good value for money / cheap / free	5
Generally needs more for kids to do	4
Needs more picnic / barbeque areas	3
Safe environment generally for all people	3
Well signposted	1
Not well advertised	1

Base: Visitors rating the Forest Drive as excellent, very good or good (157)

5.4 Favourite things about the Forest Drive and site

Visitors to Cwmcarn Forest Drive were asked what they liked most about the Forest Drive, and the forest site itself. The question was unprompted and visitors could mention more than one aspect of the drive and site. The comments given by 3% or more of the sample are outlined in Table 6 overleaf (compared to the previous research and the all Wales average).

Two favourite things about the Forest Drive stood out: the most mentioned, by nearly nine in ten, was the beautiful scenery and the views (87%). This compares to 75% saying the same of the forest site, and only 28% of visitors in 2011: the equivalent 2013 all Wales figure was 57%.

Peace, tranquillity and relaxation at Cwmcarn Forest Drive were mentioned by three quarters of visitors (76%), and 57% of those visiting the rest of the site. Only 23% of visitors to the Cwmcarn forest site in 2011 mentioned this (51% all Wales in 2013).

Around half of visitors to the Forest Drive liked the fresh air and open space (55%). Roughly the same proportions spoke of there being lots to see and do and enjoying the weather (51% for each); it being a safe environment and being clean and well looked after (49% for each).

Many other positive comments were made by sizable proportions of visitors to the Forest Drive. On the whole, many more visitors were mentioning specific aspects that they liked about both the Forest Drive and the site as a whole in 2013 compared to 2011. The exception to this concerned the cycle trails: in 2011, 70% of visitors to the Cwmcarn forest site said that they liked the cycle trails, but in 2013 this had dropped to just 11% - see Table 6 overleaf for more details.

Table 6: Q9a/Q9b – Favourite things about the Forest Drive and site

Favourite things	Cwmcarn	Cwmcarn	Cwmcarn	All Wales
	FD	Site	Site	2013
	2013	2013	2011	%
	%	%	%	
Scenery / views / beautiful	87	75	28	57
Peace / tranquillity / relaxation	76	57	23	51
Fresh air / being outside	55	54	8	16
Lots to see and do	51	49	-	3
The weather	51	33	-	4
Safe environment	49	35	6	8
Clean / well looked after	49	35	3	9
Activities for the children	43	35	9	6
Close to home / convenient	42	32	16	15
Walks / paths / trails	38	38	24	38
Like forests / trees / variety of trees	35	30	2	14
Opportunity to spend time with family / friends	33	24	9	5
Good on-site facilities	33	20	7	9
Cost / value for money	31	17	-	3
Been before / wanted to come again	29	18	2	7
Exercise / keeping fit	27	29	9	15
Wildlife / bird watching	21	13	6	7
Helpful / pleasant staff	20	12	-	1
Cycle trails / opportunity to cycle	16	10	70	17
Plenty / cheap / good parking	16	11	2	5
Negative comments	5	3	-	-

Base: All visitors – Cwmcarn FD 2013 (164); Cwmcarn Site 2011 (141); All Wales 2013 (1,114)

6. Sources of information used to plan visit

Visitors were asked where they found out about Cwmcarn Forest Drive 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.

The vast majority of visitors to the Forest Drive had always known about it or been there before (73%): this was also the case in the previous research (75%) and slightly higher than the all Wales average (59%).

A further fifth of visitors to the Forest Drive heard about it through word of mouth (20%): this is again in line with the previous research (17%) and the all Wales figure (24%). Small proportions (2% for each) found out about the Forest Drive from road signs or mountain biking magazines.

The most apparent differences in the data relate to the other sources of information being used: while 27% of the all Wales sample found out about the respective sites through sources of information such as leaflets, newspapers, maps, websites etc. (11% in 2011), only 6% of the 2013 sample of visitors had consulted other sources of information before their visit – see Table 7 below for more details.


Table 7: Q8 – How found out about the site as a place to visit

Activities	Cwmcarn FD 2013 %	Cwmcarn Site 2011 %	All Wales 2013 %
Always known about it / been here before	73	75	59
Word of mouth	20	17	24
Road signs	2	-	2
Mountain bike magazine	2	-	2
Others	6	11	27

Base: All visitors – Cwmcarn FD 2013 (164); Cwmcarn Site 2011 (141); All Wales 2013 (1,114)

Appendix I

Questionnaire

 2 Museum Place, Cardiff, CF10 3BG	<u>B01326-1a</u> <u>Natural Resources</u> <u>Wales</u> <u>CWMCARN FOREST</u> <u>DRIVE SURVEY</u> <u>FINAL questionnaire</u>	FOR OFFICE USE ONLY		INTERVIEWER RECORD WEATHER CONDITIONS (3-6m)
		Case No.	Point (1-2)	CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____

APPROACH ADULTS AGED 16+ - READ OUT

Hello, my name is of Beaufort Research. We are conducting some market research in this area on behalf of Natural Resources Wales to find out how this site is being used, and your views on the site and the facilities it offers.

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 | Do you speak Welsh? IF YES Is that.....? | (7) |
| | Yes – fluently | 1 |
| | Yes – but not fluently | 2 |
| | No | 3 |

IF SPEAK WELSH, ASK S2 BEFORE CONTINUING WITH INTERVIEW

- | | | |
|-----------|--|-----|
| S2 | We can conduct this interview in English or in Welsh - which would you prefer? | (8) |
| | English | 1 |
| | Welsh | 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) _____ | (9-10) |
| | Children aged 0-5 years _____ | (11-12) |
| | Children aged 6-10 years _____ | (13-14) |
| | Children aged 11-15 years _____ | (15-16) |

SHOWCARD A

- | | | |
|-----------|---|-------------|
| Q2 | Which of the following best describes your trip today
SINGLE CODE | (17) |
| | A day trip of less than 3 hours away from home | 1 |
| | A day trip of more than 3 hours away from home | 2 |
| | A visit that includes an overnight stay | 3 |
| | Part of a longer holiday / visit | 4 → Q3 / Q4 |
| | Don't know | 5 |

ONLY ASK Q3 AND Q4 IF PART OF A LONGER HOLIDAY / VISIT AT Q2 (CODE 4)

Q3 Thinking about the place where you are staying for the longest period of time during your holiday, can you tell me whether this is within....
READ OUT – SINGLE CODE

- 5 miles of this site
- 6 - 10 miles of this site
- 11 – 20 miles of this site
- Further than 21 miles from this site

- Don't know

- (20)

- 1
- 2
- 3
- 4

- 5

Q4 And can you tell me what is the name of the town or village where you are staying for the longest period of time during your holiday?
RECORD VERBATIM

Don't know

- (21-24m)

- M

ASK ALL

SHOWCARD B

Q5 How often, on average do you come to this site?
SINGLE CODE

- First visit
- Every day
- 4 – 6 times per week
- 1 – 3 times per week
- 1 – 3 times per month
- 4 – 6 times per year
- 1 – 3 times per year
- Less often

- Don't know

- (25)

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

- 9

SHOWCARD C1

Q6a Which of these activities have you or other members of your group personally taken part in **along the FOREST DRIVE** today?
CODE ALL MENTIONED IN COLUMN A – DO NOT CODE THOSE THAT ARE SHADED OUT

SHOWCARD C2

Q6b Which of these activities have you or other members of your group personally taken part in **around OTHER AREAS OF THE SITE** today?
CODE ALL MENTIONED IN COLUMN B

		Q6a COLUMN A	Q6b COLUMN B
		26-29m	34-37m
1	* Cycling on forest roads, tracks or trails		1
2	* Cycling / mountain biking off trails or tracks		2
3	* Dog walking	1	3
4	* Walking on a sign-posted trail	2	4
5	* Walking but not following sign posts	3	5
6	Using the café / restaurant / other catering		6
7	Using the visitor centre / shop		7
8	Using the play area	4	8
9	* Running / jogging	5	9
10	Nature / natural history visit	6	A
11	Bird watching	7	B
12	Photography	8	C
13	Educational visit		D
14	Picnic	9	E
15	Barbeque	A	F
16	Seeing something in the forest	B	G
17	Organised event / trip	C	H
18	Admiring the views	D	I
19	Fishing		J
		(30-33m)	(38-41m)
	Other (please specify)	X	X
	None of these	M	M

SHOWCARD D

Q7a And approximately how long have you spent / will you be spending at this site today?
SINGLE CODE IN 1ST ROW OF GRID

SHOWCARD D AGAIN

Q7b And how long have you spent / will you be spending on the **Forest Drive** today?
SINGLE CODE IN 2ND ROW OF GRID

	0-15 mins	16-30 mins	31-60 mins	1-2 hours	2-3 hours	3-5 hours	5+ hours	DK	
Q7a – TOTAL HOURS SPENT	1	2	3	4	5	6	7	8	(42)
Q7b – FOREST DRIVE	1	2	3	4	5	6	7	8	(43)

SHOWCARD E

Q8 How or where did you find out about this site as a place to visit?

CODE ALL MENTIONED

(44-47m)

Always known about it

1

Been here before

2

Word of mouth

3

Library

4

Local newspaper

5

National newspaper

6

Leaflet

7

Tourist Board

8

Road signs

9

Just passing / en route

A

Map

B

Smartphone app

C

Facebook

D

Twitter

E

Forestry Commission website

F

Natural Resources Wales website

G

Google

H

Other website (please specify) _____

X

Other (please specify) _____

X

(48-51m)

Don't know / can't remember

M

Q9a What do you like most about **the FOREST DRIVE?**

CODE ALL MENTIONED IN COLUMN A - DO NOT PROMPT

Q9b And what do you like most about **OTHER AREAS OF THE SITE?**

CODE ALL MENTIONED IN COLUMN B - DO NOT PROMPT

		Q9a - COL A (52-55m)	Q9b - COL B (60-63m)
1	Peace / tranquillity / relaxation	1	1
2	Scenery / views / beautiful	2	2
3	Walks / paths / trails	3	3
4	Cycle trails / freedom / opportunity to cycle	4	4
5	Wildlife / bird watching	5	5
6	Fresh air / being outside	6	6
7	Exercise / keeping fit	7	7
8	Activities / good for / something to do with the children	8	8
9	Close to home / convenient	9	9
10	Opportunity to spend time with family / friends	A	A
11	Safe environment	B	B
12	Lots to see and / or do	C	C
13	Like forests / trees / variety of trees	D	D
14	Good on-site facilities	E	E
15	Clean / well looked-after	F	F
16	The weather	G	G
17	Been before / wanted to come again	H	H
18	Helpful / pleasant staff	I	I
19	Plenty / cheap / other reference to parking	J	J
20	Cost / value for money	K	K
		(56-59m)	(64-67m)
	Other (please specify)	X	X
	Nothing	L	L
	Don't know	M	M

SHOWCARD F

Q10 How would you rate the Forest Drive as a place to visit?
SINGLE CODE

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

Don't know / not sure

(70)

- 1
 - 2
 - 3
 - 4
 - 5
 - 6
- Q11

7 → Q12

ONLY ASK Q11 IF CODED 1-6 AT Q10

Q11 What are the reasons for your rating? **PROBE** Anything else?
RECORD VERBATIM

Don't know

(71-74m)

M

ASK ALL

READ OUT – Finally, I'd like to ask some questions for analytical purposes.

Q12 INTERVIEWER RECORD GENDER

- Male
- Female

(75)

- 1
- 2

Q13 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

(76)

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

SHOWCARD G

Q14 Which of these best describes your employment status right now? (77)

SINGLE CODE

- Employee in full time job (30 hours plus a week) 1
- Employee in part time job (under 30 hours per week) 2
- Self-employed full or part time 3
- On a government supported training programme 4
- Full time education at school, college or university 5
- Unemployed and available for work 6
- Permanently sick / disabled 7
- Wholly retired from work 8
- Looking after the home 9
- Other (please specify) _____
- Refused Z

Q15 Can you tell me the occupation of the Chief Income Earner within the household? (78)
 (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 1
- C1 2
- C2 3
- DE 4
- Refused 5

Q16 Do you have any children aged 15 or under living in your household? (79)

- Yes 1
- No 2
- Refused 3

Q17 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? (80)
INCLUDES PROBLEMS RELATED TO OLD AGE

- Yes – limited a lot 1
- Yes – limited a little 2
- No 3
- Refused 4

SHOWCARD H

Q18 Which of these best describes your ethnic origin?
SINGLE CODE

White British
 White Welsh
 White Irish
 White East European
 White other European
 Any other White background (please specify) _____

Caribbean
 African
 Any other Black background (please specify) _____

Indian
 Pakistani
 Bangladeshi
 Any other Asian background (please specify) _____

White and Black Caribbean
 White and Black African
 White and Asian
 Any other Mixed background (please specify) _____

Chinese

Other (please specify) _____

Refused

Q19 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**

(86)	(87)	(88)	(89)	(90)	(91)	(92)

Overseas visitor (please specify country) _____

(85)

1

2

3

4

5

E

6

7

F

8

9

A

G

B

C

D

H

J

I

Z

(93-94)

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:	
				(95)(96)(97)(98)	
WRITE IN YOUR INTERVIEWER NUMBER →				(99)	(100)
				(101)	(102)
B01326-1a	F.O.U (BACK CHECKS)		Accompanied	Yes 1 No 2	Supervisor signature

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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