

Research Report

Quality of the Visitor
Experience 2015

Fforest Fawr



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Prepared by:
Beaufort Research



**Cyfoeth
Naturiol**
Cymru
**Natural
Resources**
Wales



Forestry Commission
England

Contact Details

Agency contact: Sarah McDonough

Project: B01326-3

Date: Febraury 2016

Beaufort Research

2 Museum Place

Cardiff

CF10 3BG

Tel: (029) 2037 8565

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

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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 147 visitor interviews conducted at Fforest Fawr 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 Fforest Fawr

Fforest Fawr is a swathe of upland country which is included within the Brecon Beacons National Park and is the stunning backdrop to the famous Castell Coch. Near the village of Tongwynlais, the forest is a beautiful mixed woodland which is renowned for its display of bluebells in the spring and is frequently used as a film location.

Fforest Fawr has a range of activities available to visitors including a series of waymarked walks and horse riding routes. There is also an easy access route and a sculpture trail which has been made to encourage children to walk in the forest.

1.3 Perceptions of the site

Perceptions of Fforest Fawr as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Fforest Fawr in gave a negative rating of the site.

Just under half (47%) rated the site as 'excellent'; in line with the data from 2012 survey (49%) but lower than the all Wales figures (58%). A further two fifths (44%) gave the site a rating of 'very good' and 8% rated it as 'good'. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 91%, up slightly from the 2012 figure of 89%.

Similarly, ratings of how safe and welcoming Fforest Fawr were also very positive, which was also the case across all Wales sites. Only 1% of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just under half the visitors gave this measure an 'excellent' rating (48%); this slightly lower than the figure obtained for all Wales sites (52%), but higher than the findings from the 2012 survey (43%).

Another two fifths (39%) gave a 'very good' rating for how safe and welcoming Fforest Fawr felt (in line with both the all Wales and 2012 figures). Just over one in ten (12%) gave a 'good' rating. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 87%, up slightly from the 2012 figure of 81%.

When asked whether they would be likely to recommend Fforest Fawr as a place to visit to a friend or relative (using a score of 0-10), scores for Fforest Fawr and all Wales sites generally were positive: only 11% gave a rating of less than 8/10 for Fforest Fawr. However, more people gave lower ratings in the most recent survey compared to 2012 (7%) and all Wales sites (6%).

Nearly six in ten (57%) gave a rating of 10; this was slightly lower than the all Wales figure (62%) but significantly lower than the proportion giving the highest rating in 2012 (75%).

Despite this slight change in the distribution of scores, the mean rating for Fforest Fawr stood at 9.2, which equalled the 2012 average rating and was in line with the all rating of Wales at 9.4/10.

Looking at the perceived quality of various facilities at the site; the facilities that received the highest scores were the walking trails and the forest art / sculptures; around half rated this as 'excellent' (48% and 45% respectively) whilst another third rated them as 'very good' (36% and 37% respectively).

The car parking, Viewpoint and easy/all ability access were felt to be excellent by around two in five visitors, with most other visitors giving these very good or good ratings.

Very few visitors negatively rated the facilities at this site; the only aspects to receive poor ratings, albeit by very small numbers, were the car parking (1%) and easy / all ability access (2%).

1.4 Strengths of the site

Three favourite things about Fforest Fawr stood out; the most mentioned (by two thirds) was the peace and tranquillity of the site (67%), followed by half mentioning the scenery and beautiful views (56%) or the walks, paths and trails (46%).

1.5 Areas for improvement

In contrast to all sites across Wales, at Fforest Fawr, the majority of visitors felt that something could be improved at the site (83% cf. 47% overall).

Most of the comments received related to the lack bins; half of visitors specified that having more litter bins (50%) and dog poo bins (46%) would enhance the enjoyment of their visit.

A further one in ten wanted to see an improvement to the toilets / shower facilities or requested more seating (9% for each), while roughly one in twenty mentioned that they would like catering to be provided, or better signage (7% for each).

There were calls by small minorities for:

- Provide café / catering / refreshments
- More sculptures / repair sculptures
- More wildlife / birds
- Negative comments about access for dogs.

1.6 Visitor profile

In 2015, only one in six (16%) of visitors to Fforest Fawr were first-time visitors; this was slightly higher than was seen in 2012 (9%), but much lower than the all Wales average of 37% who said they had **never** visited their respective NRW site before.

Therefore, the overwhelming majority of visitors to Fforest Fawr had been to the site previously (84%).

Reflecting this; the overwhelming majority of visitors to Fforest Fawr were day trippers (93%), with most of these travelling for less than three hours to visit the site (88%). This was also the case in 2012, when 97% of visitors had travelled less than three hours to visit the site for a day trip. The data varies from the all Wales position, where 62% were day trippers and only around half (52%) had travelled for less than three hours.

Conversely, only a very small proportion (6%) of visitors to Fforest Fawr in 2015 were staying overnight or as part of a longer holiday; this is much lower than the all Wales average of 37%, but more in line with the 2012 data (2%).

The gender profile was fairly evenly split (52% males, 48% females), which was slightly more balanced than the all Wales profile and the 2012 survey (58% male and 42% female for the all Wales average).

In terms of age; the profile of visitors to Fforest Fawr was very similar to both the all Wales average and the previous research at this site. Just over four in ten (43%) were aged 16-44 years (vs. 43% all Wales and 42% in 2012). A further 47% were aged between 45 and 64 years (43% all Wales, 40% 2012). A slightly smaller proportion of visitors to Fforest Fawr were 65+ compared to the all Wales average and the 2012 data (10% in 2015 cf. 15% for both all Wales and 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 Fforest Fawr, with 78% of visitors categorised as ABC1, and 20% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

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 Fforest Fawr, interviewing took place between 30th March and 28th October, and a total of 147 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Fforest Fawr 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 Fforest Fawr. 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 Fforest Fawr was very similar to that of the visitors to all the Wales sites.

The gender profile was fairly evenly split (52% males, 48% females), which was slightly more balanced than the all Wales profile and the 2012 survey (58% male and 42% female for the all Wales average).

In terms of age; the profile of visitors to Fforest Fawr was very similar to both the all Wales average and the previous research at this site. Just over four in ten (43%) were aged 16-44 years (vs. 43% all Wales and 42% in 2012). A further 47% were aged between 45 and 64 years (41% all Wales, 40% 2012). A slightly smaller proportion of visitors to Fforest Fawr were 65+ compared to the all Wales average and the 2012 data (10% in 2015 cf. 15% for both all Wales and 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 Fforest Fawr, with 78% of visitors categorised as ABC1, and 20% 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 Fforest Fawr were in full-time employment (65%); this figure was higher than the all Wales average (59%), and noticeably higher than was found in the previous research in 2012 (50%). Only 11% of visitors to this site were retired; lower than both the all Wales average and the 2012 survey (18% and 19% respectively).

Over a third of visitors to Fforest Fawr (36%) had children living at home; higher than the all Wales average of 29% (no data for 2012).

The overwhelming majority of visitors to Fforest Fawr were White British / Welsh / Irish (95%), with only a very small number of visitors describing their ethnicity as 'White other nationality' (2%) or 'Black / Asian / Mixed' (1%); the skew towards white British visitors was slightly more pronounced at this site compared to all sites in Wales included in the research in 2015 (91%).

A total of 11% of visitors to Fforest Fawr 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		Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales %
Gender	Male	52	58	58
	Female	48	42	42
Age	16 - 24	5	5	6
	25 - 34	18	14	16
	35 – 44	20	23	21
	45 – 54	27	25	22
	55 – 64	20	15	19
	65+	10	15	15
	Refused	-	2	1
	Social class	AB	37	
C1		41		43
C2		13		16
DE		7		9
Refused		1		1
Working status	Full-time employee (30+ hours per week)	65	50	59
	Part-time employee (<30 hours per week)	5	8	9
	Self-employed	9	10	6
	Full-time education	4	2	3
	Unemployed	1	2	1
	Permanently sick / disabled	2	-	1
	Retired	11	19	18
	Looking after the home	1	4	2
	Other	1	4	<1
	Refused	1	-	1
	Limiting illness	Yes – limited a lot / little	9	9
No		88	91	92
Refused		3	-	2

Demographic groups		Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales %
Children in household	Yes	36		29
	No	64		70
Ethnicity	White – British / Welsh / Irish	95		91
	White – Other	2		7
	Black / Asian / Mixed	1		2
Welsh speaker	Yes	11		13
	No	89		87

Base: All visitors – Fforest Fawr 2015 (147); Fforest Fawr 2012 (213); All Wales (1,188)

3.2 Group profile

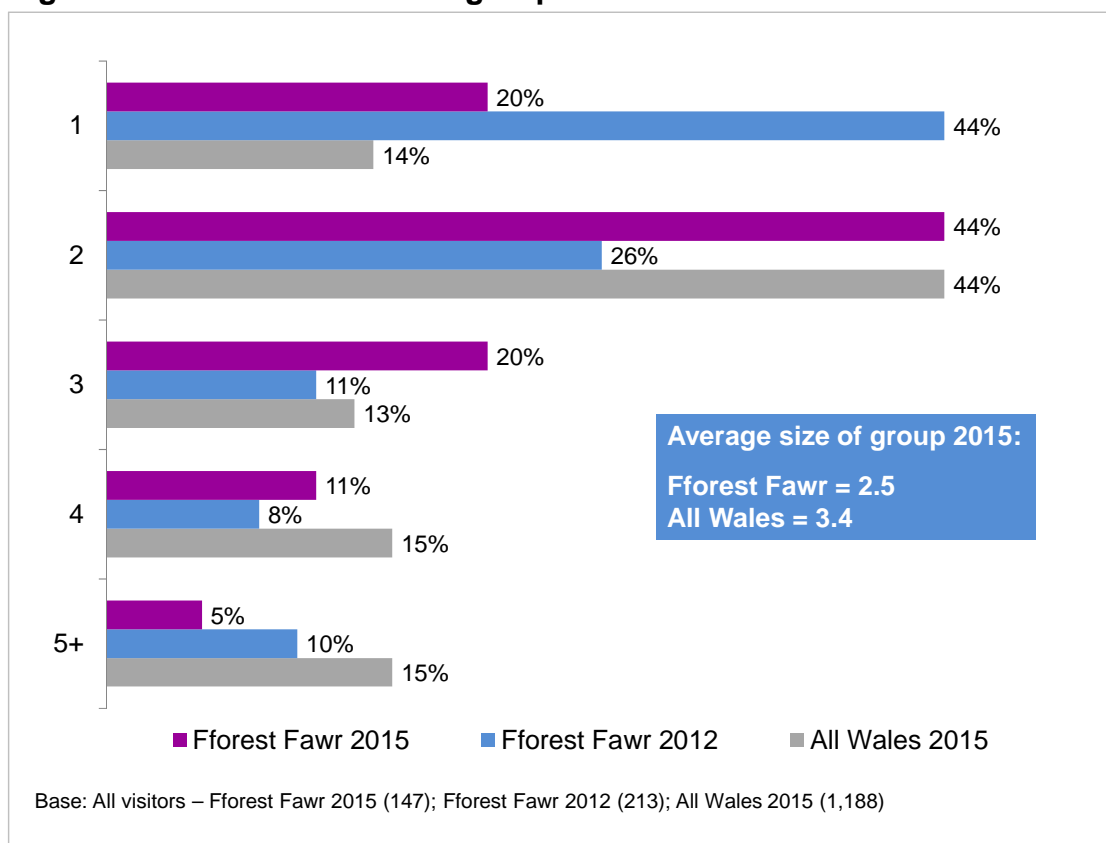
3.2.1 Size of group

Group sizes at Fforest Fawr (averaging 2.5 people), were smaller than group sizes to all Wales sites (which averaged 3.4 people). The average was reduced due to there being slightly more visitors at the site alone (20%) compared to the all Wales average (14%). Most people were in groups of two (44% for Fforest Fawr and all Wales).

Compared to 2012, the number of visitors per group has changed significantly; in the previous research, 44% were visiting alone (cf. 20% 2015) while 26% were in groups of two (cf. 44% 2015).

There were fewer larger groups of five or more people at Fforest Fawr in 2015 (5%) compared to both the all Wales average (15%) and the 2012 survey (10%) – see Figure 1 overleaf

Figure 1: Q1. Total size of the group



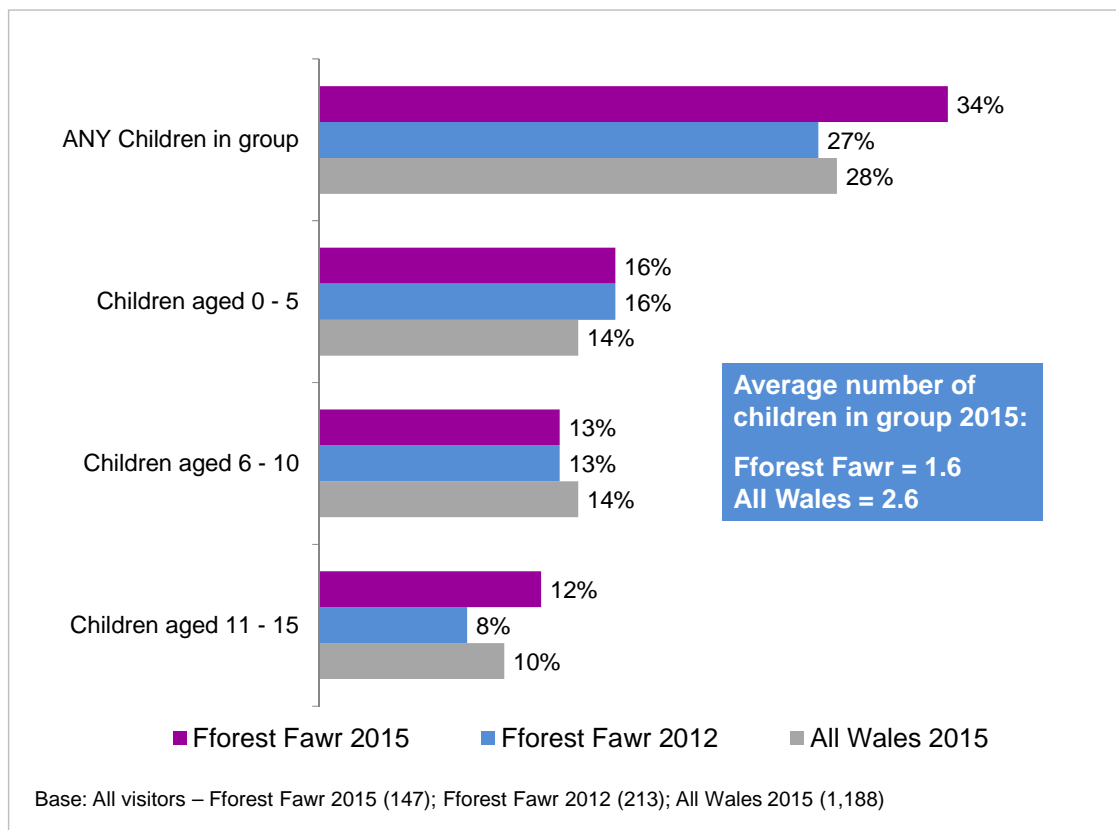
3.2.2 Composition of group

Although more of the visitor groups at Fforest Fawr contained children (34%) when compared to the all Wales average (28%), there were, on average, fewer children per group (1.6 average for Fforest Fawr cf. 2.6 all Wales).

The ages of the children visiting were fairly evenly distributed, although slightly skewed towards younger children aged up to 5 years; 16% of visitor groups contained children of this age. Only around one in ten visitor groups contained children aged 6-10 years (13%) or 11-15 years (12%) – these figures were in line with the all Wales average.

Looking at group composition in 2012; fewer groups contained children in the previous research (27%), and they were less likely to be aged 11-15 years (8%) than was seen in the recent survey (12%) – see Figure 2 overleaf.

Figure 2: Q1. Composition of group



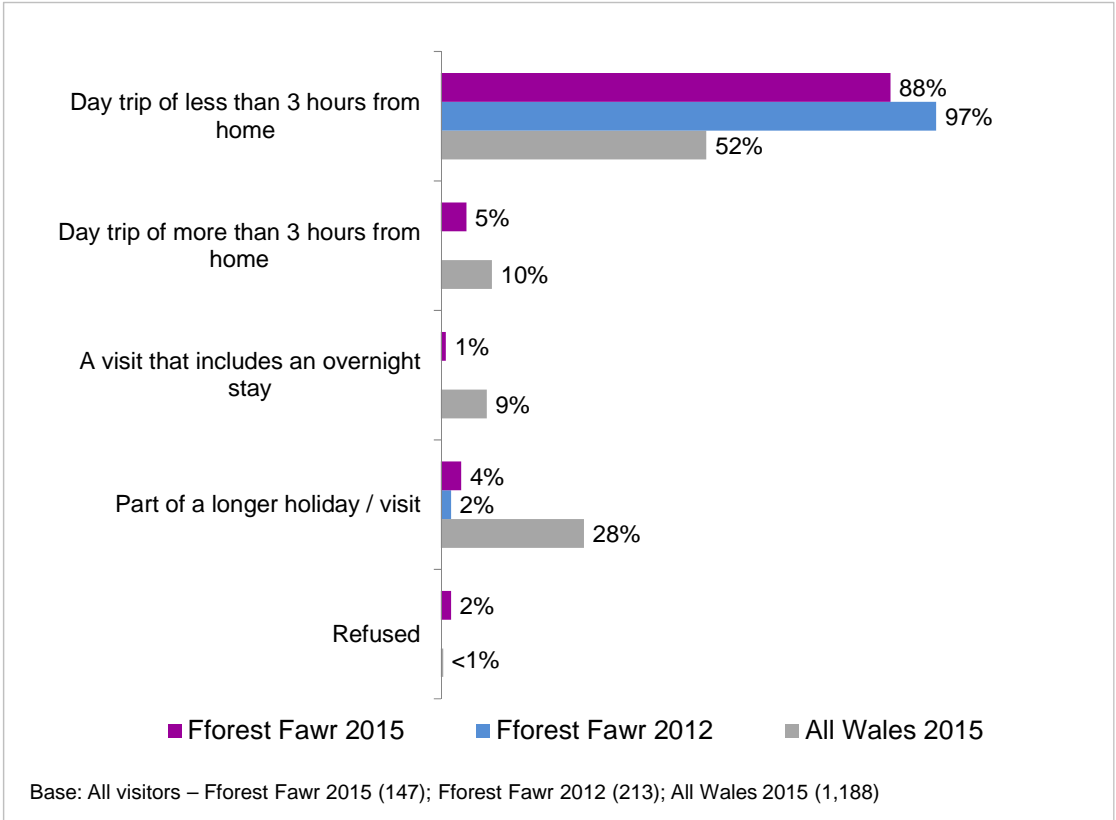
4. Profile of visit

4.1 Type of visit

The overwhelming majority of visitors to Fforest Fawr were day trippers (93%), with most of these travelling for less than three hours to visit the site (88%). This was also the case in 2012, when 97% of visitors had travelled less than three hours to visit the site for a day trip. The data varies from the all Wales position, where 62% were day trippers and only around half (52%) had travelled for less than three hours.

Conversely, only a very small proportion (6%) of visitors to Fforest Fawr in 2015 were staying overnight or as part of a longer holiday; this is much lower than the all Wales average of 37%, but more in line with the 2012 data (2%) – 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.

Reflecting the propensity of local day trippers to the site, the majority of visitors to Fforest Fawr lived fairly close by (89%), with 20% visiting from the Valleys and 69% from South East Wales. Only a small proportion (3%) was visiting from other areas of Wales.

Amongst the tenth of visitors coming from outside Wales (8%), most were visiting from England (7%), with only 1% coming from abroad.

Given the higher proportion of day visitors to Fforest Fawr compared to all sites surveyed across Wales, it is perhaps not surprising that a significantly higher proportion of visitors to Fforest Fawr resided in Wales (92%) compared to the all Wales average of 61% - 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

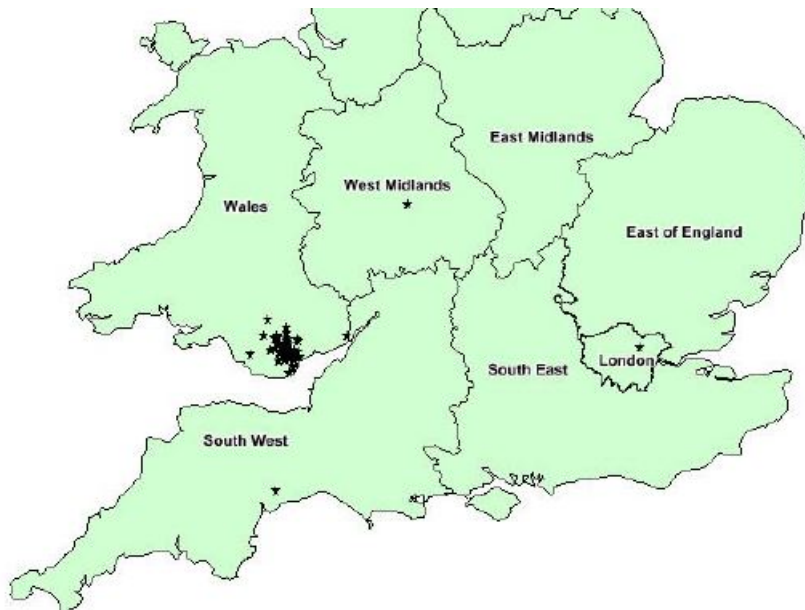
Area of residence		Fforest Fawr 2015 %	All Wales %
Home region	North Wales	-	4
	Mid / West Wales	1	14
	South West Wales	2	7
	Valleys	20	6
	South East Wales	69	30
	Outside of Wales	8	39
Home nation	Wales	92	61
	England	7	35
	Rest of UK	-	<1
	Abroad	1	4

Base: All visitors – Fforest Fawr 2015 (147); All Wales (1,188)

Figure 4a: Map of visitor origin for Fforest Fawr 2015



Figure 4b: Map of visitor origin for Fforest Fawr 2012



4.3 Frequency of visits

4.3.1 First-time visitors

In 2015, only one in six (16%) of visitors to Fforest Fawr were first-time visitors; this was slightly higher than was seen in 2012 (9%), but much lower than the all Wales average of 37% who said they had **never** visited their respective NRW site before.

Therefore, the overwhelming majority of visitors to Fforest Fawr had been to the site previously (84%).

4.3.2 Repeat visitors

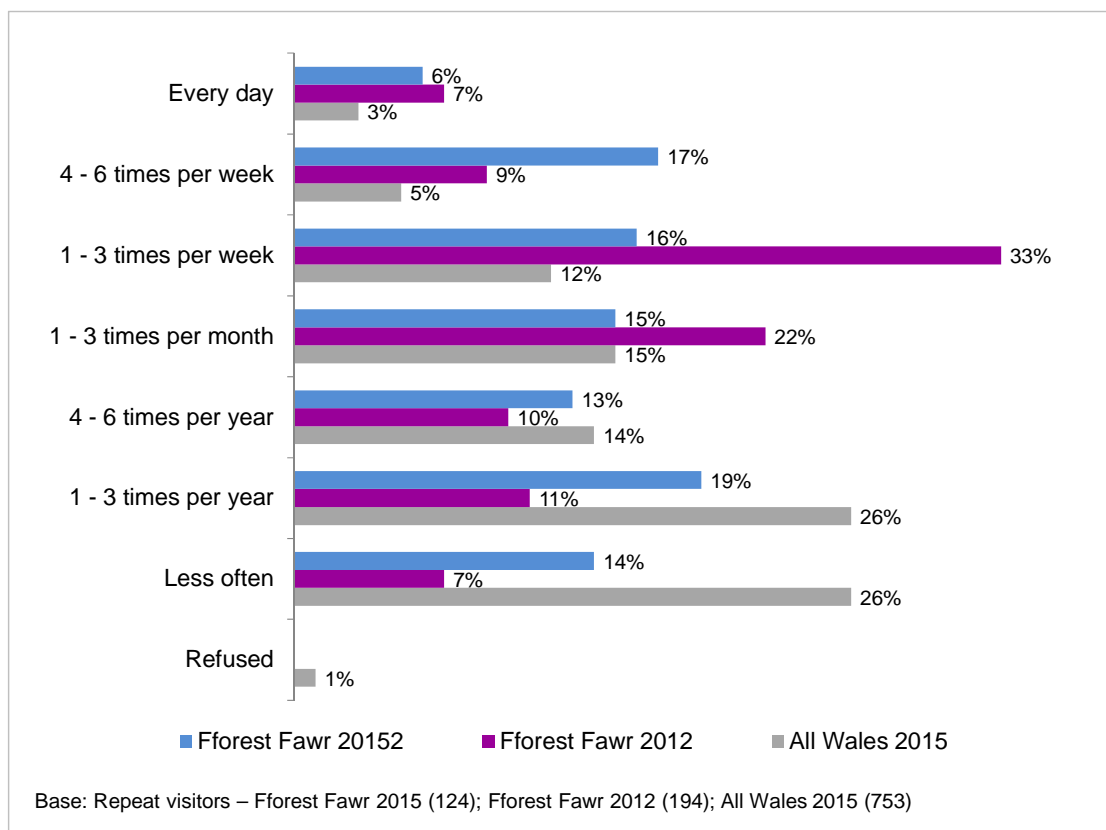
Focussing on repeat visitors, there was a fairly even spread of those visiting the site regularly and less regularly, with just over half visiting at least once a month (54%) and just under half visiting less often than once a month (46%).

Nearly four in ten visited Fforest Fawr at least once a week (39%), while 15% visited a few times a month. A further 32% visited a few times a year, while the remaining 15% visited less often than once a year.

This pattern varies to the previous survey, when nearly half were weekly visitors (49%), and those visiting less often than once a year accounted for only 7% of visitors.

Across all Wales sites in 2015, there was a much higher proportion of infrequent visitors (26% visiting less often than once a year) than was seen at Fforest Fawr (14%) – 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 Fforest Fawr were at the site an average of 1 hour and 28 minutes; an hour less than average length of stay across all sites in Wales (2 hours 24 minutes).

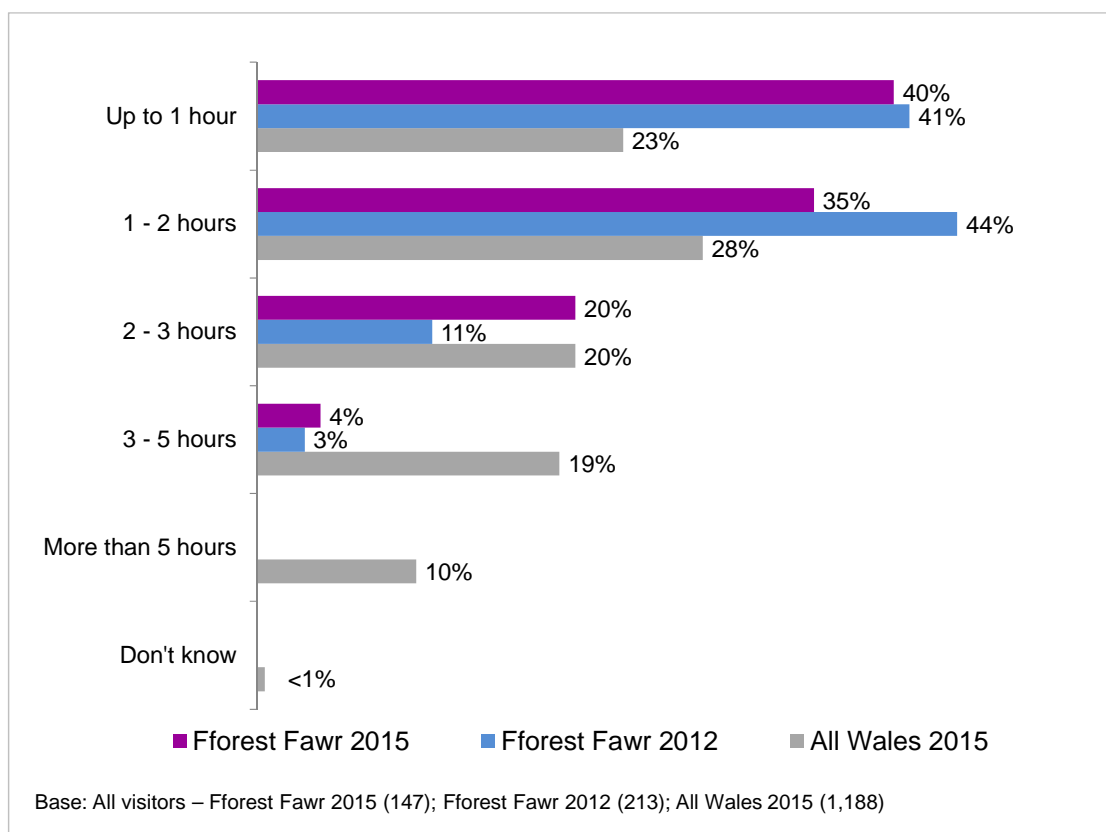
The varying lengths of time visitors spent at Fforest Fawr can be seen overleaf. As reflected in the average time at the site, three quarters of visitors reported that they had stayed up to two hours at the site (75%).

Moreover, for a fifth of visitors (40%), their trip to the forest was fairly brief, lasting less than one hour (almost double the all Wales figure of 23%).

Only a quarter (24%) stayed at the site longer than two hours; this proportion is significantly lower than the all Wales position, where 49% intended to stay longer than two hours.

Back in 2012, an even higher proportion of visitors to Fforest Fawr claimed to be visiting for less than two hours (85%) – see Figure 6 overleaf for more details.

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 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 Fforest Fawr, by far, was walking generally (98%) - this was marginally higher than the all Wales average of 91%, and significantly higher than was seen in 2012 (79%).

Compared to other sites across Wales (and the 2012 research), there was a much more even spread of people who were walking both on and off sign-posted trails (60% and 53% respectively), and those who were walking the dog (50%).

Cycling represented a very small percentage of activities at Fforest Fawr (4%), but this was comparable to all Wales data (1%). Other physical activities such as running / jogging were only undertaken by a small proportion of visitors to Fforest Fawr (3% cf. 2% all Wales); nobody took part in orienteering / Geocaching or horse-riding at this site.

Therefore, virtually all visitors (99%) took part in 'active' activities (cf. 92% in 2012 and 93% across Wales in 2015).

Other popular 'passive' activities at Fforest Fawr included admiring the views (28%), photography (10%), having a picnic or barbeque, bird watching or looking at nature (7% for each) - see Table 4 below and overleaf.

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

Activities undertaken	FForest Fawr 2015 %	FForest Fawr 2012 %	All Wales 2015 %
Cycling on forest roads, tracks or trails	3	4	1
Cycling off trails or tracks	3	9	1
TOTAL CYCLING	4	13	1
Walking on a sign-posted trail	60	35	68
Walking but not following sign-posts	53	18	28
Dog walking	50	56	24
TOTAL WALKING	98	79	91
Orienteering / Geocaching	-	3	1
Running / jogging	3	3	2
Horse-riding	-	1	<1

Activities undertaken continued	Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales 2015 %
Admiring the views	28	23	24
Photography	10	9	16
Picnic or barbeque	7	8	12
Bird watching	7	4	13
Nature / natural history visit	7	3	5
Seeing something in the forest	6	3	5
Using the café / restaurant / other catering	3	-	13
Using the play area	3	6	5
A forest drive	3	-	1
Camping	1	-	1
Organised trip / event	1	-	3
Using the Visitor Centre / shop	1	-	8
Look for wildlife / plants / animals	1	-	1
Taken part in ACTIVE activities	99	92	93
Taken part in PASSIVE activities	48	Not available	59

Base: All visitors – Fforest Fawr 2015 (147); Fforest Fawr 2012 (213); 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 cycling activities (6) and running / jogging (5), these have not been commented on.

As previously mentioned; visits to Fforest Fawr lasted 1 hour and 28 minutes on average. Those walking spent an average of 1 hour and 22 minutes doing this (most of their visit): this compares to the average time of 1 hours 14 minutes spent walking at Fforest Fawr in 2012.

One in ten (9%) took a fairly short walk, lasting less than 30 minutes, while roughly a third walked for between 31-60 minutes (35%) or between 1-2 hours (37%).

While only a relatively small proportion (18%) walked for two hours or longer, this proportion was higher than the 2012 data, when just 9% had walked at the site for this amount of time – see Table 5 below.

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

Time at site	Total duration of visit		Time spent on any walking	
	2015	2012	2015	2012
Up to 30 minutes	10	6	9	6
31 – 60 minutes	30	35	35	38
1 – 2 hours	35	44	37	45
2 – 3 hours	20	11	15	8
3 – 5 hours	4	3	3	1
5+ hours	-	-	-	-
Don't know	-	-	1	2
AVERAGE	1 hour 28 mins	1 hours 22 min	1 hour 22 mins	1 hours 14 mins

Base: All respondents - 2015 (147); 2012 (213)

Respondents who walked - 2015 (144); 2012 (168)

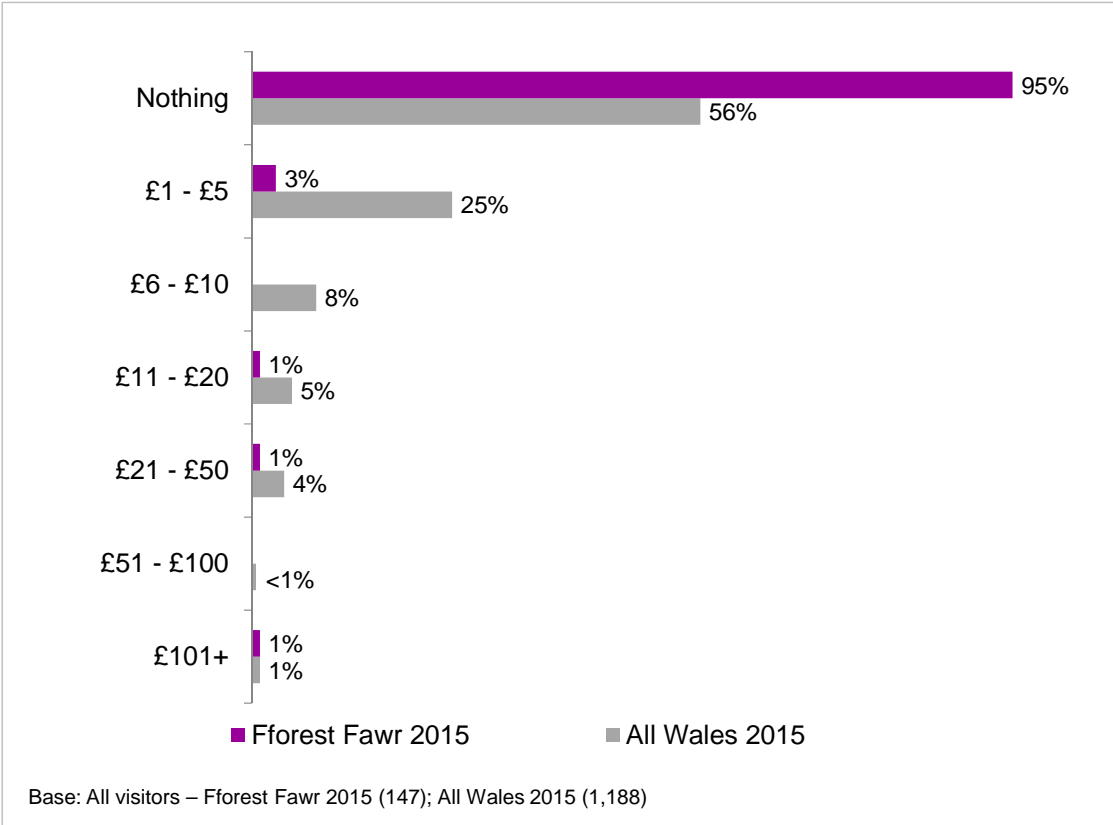
4.7 Money spent at site and in the area as a result of the visit

Visitors to Fforest Fawr 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.

The vast majority **did not** intend to spend some money at the site (95%). For the small minority who **did** intend to spend anything, amounts tended to be small, with 3% saying they would spend up to £5, and 1% saying they would spend between £11 - £20. One respondent, however, reported that they intended to spend over £108 at the site, with £100 of this being spent on wood. This brought the average spend to just £1.45 (compared to £6.99 across all Wales sites) – see Figure 7 below for more details.

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 Fforest Fawr were likely to spend anything on was food and drink, albeit only 5% (average £0.56 cf. £2.16 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 £	
	Fforest Fawr %	All Wales %	Fforest Fawr £	All Wales £
Food and drink	5	22	0.56	2.16
Activities at the site	1	1	0.07	1.56
Parking	-	27	-	1.68
Souvenirs / gifts	1	3	0.14	0.41
Hiring equipment	-	1	-	1.11
Anything else	1	1	0.68	0.10

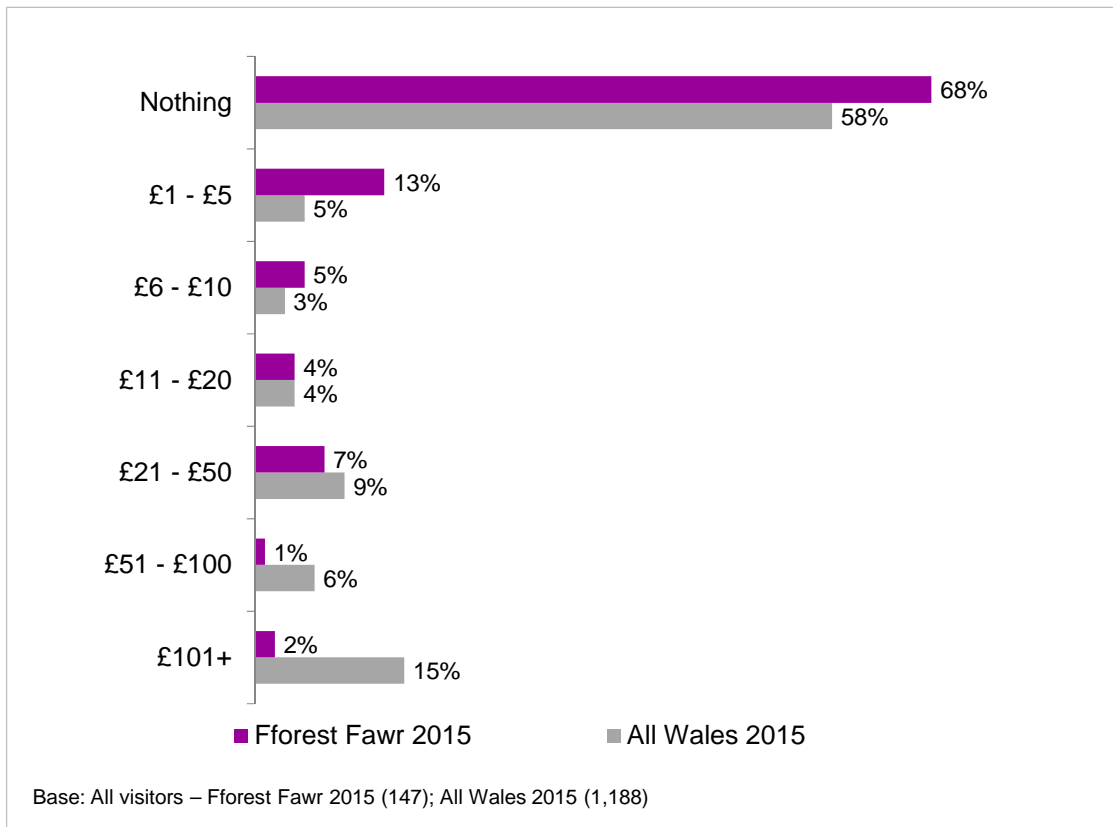
Base: All visitors – Fforest Fawr 2015 (147); All Wales 2015 (1,188)

Visitors to Fforest Fawr 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.

Just over two thirds of visitors to Fforest Fawr claimed that they **would not** be spending anything in the area as a result of their trip (68%); this was higher than the all Wales average of 58% saying the same.

Amongst the third of visitors who **did** intend to spend anything in the area (32%), most intended to spend up to £10 (18%). A further tenth (11%) said they would be spending around £11 to £50, while only 3% intended to spend more than £50 in the area around Fforest Fawr. The average intended spend in the local area was just £6.94; significantly lower than the all Wales average of £87.52 - Figure 8 overleaf provides more details.

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



Looking at spend in the local area as a result of their visit to Fforest Fawr, food/drink and transport were mentioned by the highest proportion of visitors (20% for each); visitors were likely to spend £3.69 food/drink and £2.25 on transport.

Given that most of the visitors to this site were not staying in the area (93%), it is unsurprising that average accommodation spend around Fforest Fawr was much lower than the all Wales average (including zero responses). The average was £0.44, compared to £51.81 across all sites. This gap in tourist expenditure seems to be the main factor driving the low average spend in the area around Fforest Fawr - see Table 6b overleaf.

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 £	
	Fforest Fawr %	All Wales %	Fforest Fawr £	All Wales £
Food and drink	20	29	3.69	21.06
Accommodations	1	19	0.44	51.81
Admissions to other attractions	3	4	0.54	3.99
Parking	1	7	0.04	1.67
Transport	20	22	2.25	9.15
Souvenirs / gifts	3	4	0.27	1.65
Hiring equipment	-	1	-	1.82
Anything else	-	2	-	1.02

Base: All visitors – Fforest Fawr 2015 (147); All Wales 2015 (1,188)

5. Perceptions of the site

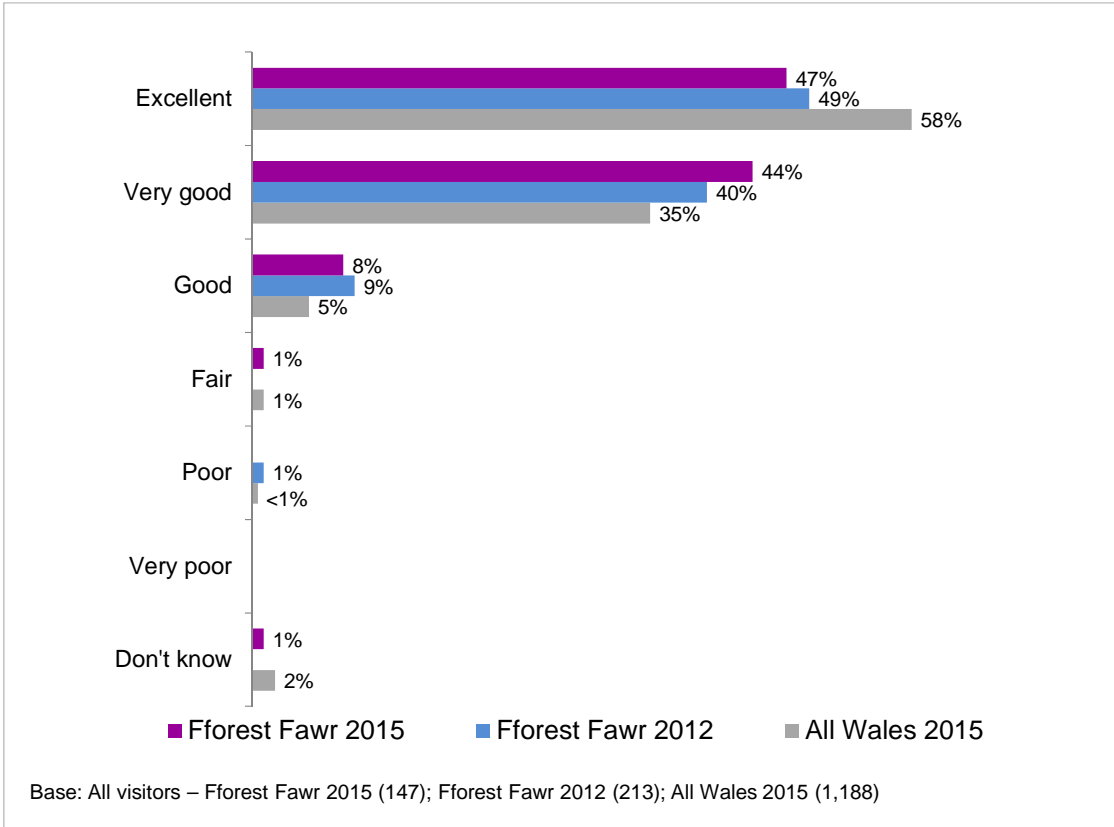
5.1 Overall rating of the site as a place to visit

Perceptions of Fforest Fawr as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Fforest Fawr in gave a negative rating of the site.

Just under half (47%) rated the site as 'excellent'; in line with the data from 2012 survey (49%) but lower than the all Wales figures (58%). A further two fifths (44%) gave the site a rating of 'very good' and 8% rated it as 'good'.

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 91%, up slightly from the 2012 figure of 89% – 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

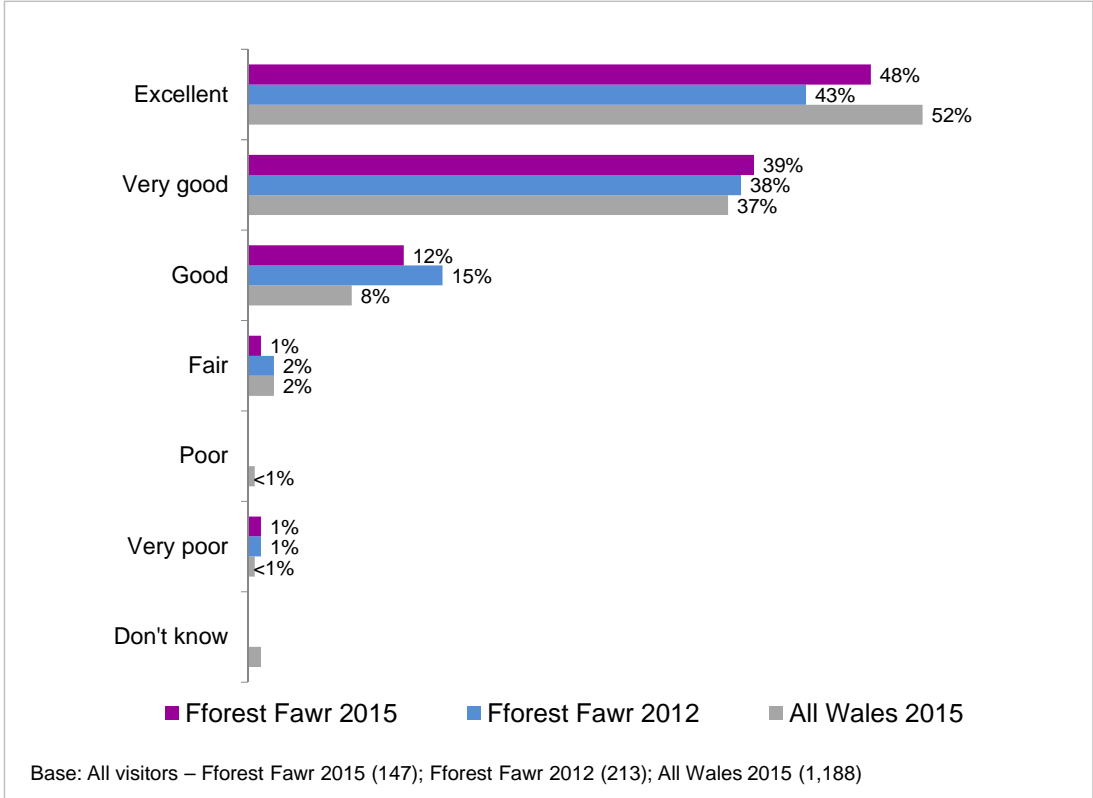
Similarly, ratings of how safe and welcoming Fforest Fawr were also very positive, which was also the case across all Wales sites. Only 1% of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just under half the visitors gave this measure an ‘excellent’ rating (48%); this slightly lower than the figure obtained for all Wales sites (52%), but higher than the findings from the 2012 survey (43%).

Another two fifths (39%) gave a ‘very good’ rating for how safe and welcoming Fforest Fawr felt (in line with both the all Wales and 2012 figures). Just over one in ten (12%) gave a ‘good’ rating.

Therefore, the proportion giving the site an ‘excellent / very good’ rating in 2015 stood at 87%, up slightly from the 2012 figure of 81% – 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 Fforest Fawr and all Wales sites.

The scenery, views and beautiful environment were mentioned by most visitors (43%), whilst a quarter said that Fforest Fawr was peaceful, tranquil and relaxing and a generally safe environment to be in (26% for both).

Another fifth mentioned that they liked the fresh air and open spaces of Fforest Fawr (22%), while around one in six commented on how the site was both well laid out and well signposted (17% and 16% respectively).

While 13% felt that Fforest Fawr was clean, tidy and well maintained, this proportion was significantly lower than the all Wales figure of 23% - see Table 7 below.

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	Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales 2015 %
The scenery / views / beautiful environment	43	2	40
Peaceful / pleasant / tranquil / relaxing / welcoming	26	-	34
Safe environment generally	26	-	38
Fresh air / open space / plenty of space / freedom	22	-	24
Well laid out / well organised / good set up	17	-	27
Well signposted / good maps / information boards	16	2	26
Good, safe place for the kids to play and run around	14	-	14
Other visitors here are friendly	14	-	10
Good provision of paths, trails and tracks	14	2	21
Clean / tidy / well maintained / litter free	13	2	23
Live locally / convenient / easy to get to	9	-	5
Good quality facilities or amenities	6	2	12
Friendly / helpful staff or rangers	3	5	8

Reasons for a positive rating of site continued..	Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales 2015 %
Dog friendly	2	-	<1
Don't know	8	-	3
General positive comments	3	19	3
Some negative comments	8	-	5

Base: Visitors rating the site as excellent, very good or good – Fforest Fawr 2015 (145); Fforest Fawr 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) :

- Good value for money / cheap / free
- Plenty to do / has everything you want
- Problems with dogs / too many / not on leads
- Needs better signage (more description / clearer / more signs in general)
- Some paths are difficult / dangerous (steep drops, loose shale, steep for kids)
- Just enough restrictions / not too many rules.

5.3 Recommending the site as a place to visit

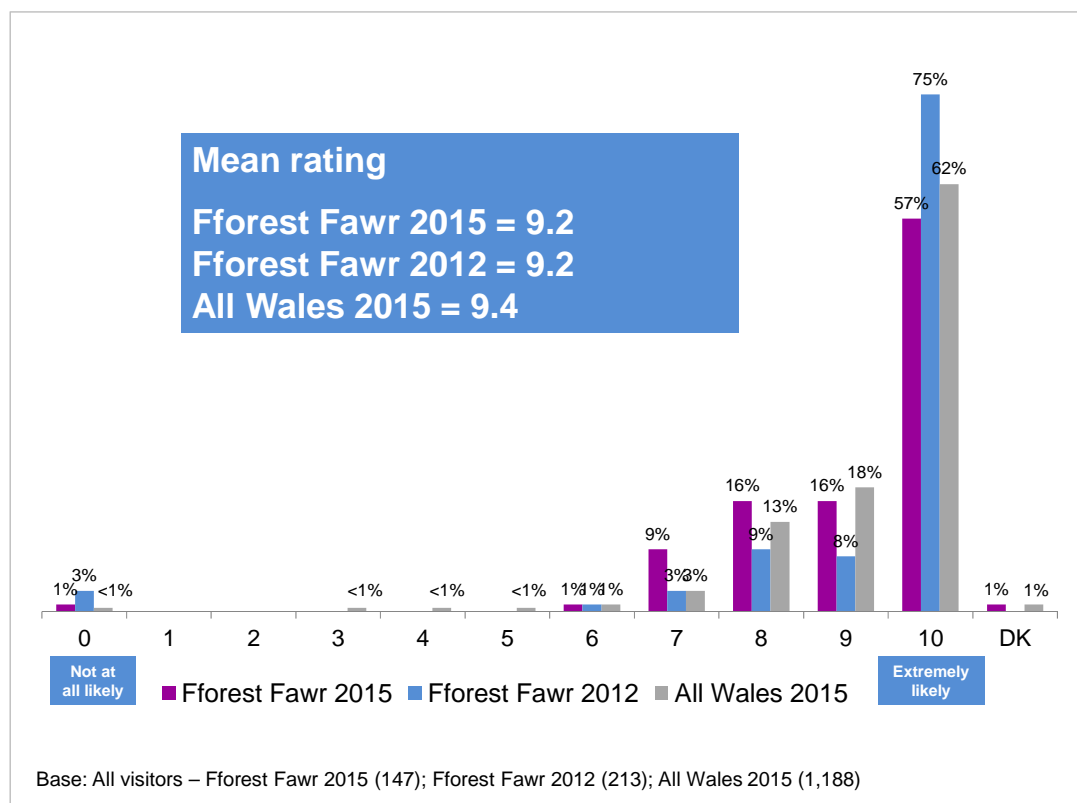
Visitors were asked whether they would be likely to recommend Fforest Fawr as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Fforest Fawr and all Wales sites generally were positive: only 11% gave a rating of less than 8/10 for Fforest Fawr. However, more people gave lower ratings in the most recent survey compared to 2012 (7%) and all Wales sites (6%).

Nearly six in ten (57%) gave a rating of 10; this was slightly lower than the all Wales figure (62%) but significantly lower than the proportion giving the highest rating in 2012 (75%).

Despite this slight change in the distribution of scores, the mean rating for Fforest Fawr stood at 9.2, which equalled the 2012 average rating and was in line with the all rating of Wales at 9.4/10.

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 Fforest Fawr is 72, which is somewhat lower (by 7 points) than the all Wales score of 79 and the 2012 score of 76 (by 4 points).

5.4 Strengths of the site

Visitors to Fforest Fawr 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).

Three favourite things about Fforest Fawr stood out; the most mentioned (by two thirds) was the peace and tranquillity of the site (67%), followed by half mentioning the scenery and beautiful views (56%) or the walks, paths and trails (46%).

For most aspects of the site favoured by visitors, more people mentioned these in 2015 compared to 2012; especially the peace and beauty of the site – see Table 8 below for more details.

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

Favourite things about the site	Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales 2015 %
Peace / tranquillity / relaxation / atmosphere	67	51	56
Scenery / views / beautiful/ natural / non-commercial	56	44	62
Walks / paths / trails	46	31	42
Like forests / trees / variety of trees / plants	26	21	16
Close to home / convenient / location	20	14	16
Fresh air / being outside	18	11	24
Sculptures / art	16	3	2
Wildlife / bird watching	13	9	21
Been before / wanted to come again	11	-	12
Safe environment	10	7	15
Exercise / keeping fit	7	9	15
Clean / well looked-after	7	3	16
Plenty / cheap / other reference to parking	7	-	3
Cycle trails / freedom / opportunity to cycle	6	6	2
Activities that are good for the children	6	4	9
Opportunity to spend time with family / friends / family friendly	6	-	6
The weather	6	-	3
Ideal for dogs / dog friendly / safe for dogs (has dog poo bins)	5	5	2
Cost / value for money / free	3	-	2
Good on-site facilities	2	-	9

Base: All visitors – Fforest Fawr 2015 (147); Fforest Fawr 2012 (213); All Wales (1,188).

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

- Not crowded / not too many people
- Lots to see and do
- Local / industrial history / historical interest
- Open space / plenty of space
- Good accessibility
- Play area
- Remote / away from traffic / no cars
- Friendly people.

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; in contrast to all sites across Wales, at Fforest Fawr, the majority of visitors felt that something could be improved at the site (83% cf. 47% overall).

Most of the comments received related to the lack bins; half of visitors specified that having more litter bins (50%) and dog poo bins (46%) would enhance the enjoyment of their visit.

A further one in ten wanted to see an improvement to the toilets / shower facilities or requested more seating (9% for each), while roughly one in twenty mentioned that they would like catering to be provided, or better signage (7% for each - see Table 9 overleaf.

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

Suggested improvements	Fforest Fawr 2015 %	All Wales 2015 %
Nothing / general positive comments	17	53
More bins / litter bins / recycling bins / less litter	50	9
More dog poo bins / remove dog poo	46	9
Improve toilets / more toilets / shower facilities / changing area	9	8
More seating	9	3
Improve café / catering / refreshments	7	2
Improve signage / more maps / better maps	7	6
More picnic areas / BBQ / picnic tables and benches	6	2
Longer / more challenging trails, paths and cycle routes	3	1
Improve maintenance of paths / cycle tracks / better surfacing	3	2
More trails / paths / cycle tracks	3	1
Better weather / more sunshine	3	2
Fewer people / fewer cyclists	3	1
Better parking (easier, more, cheaper, free)	2	4
More activities for children / more play areas	2	1
Don't know	-	1

Base: All visitors – Fforest Fawr 2015 (147); Fforest Fawr 2012 (213) All Wales (1,188).

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

- Provide café / catering / refreshments
- More sculptures / repair sculptures
- More wildlife / birds
- Negative comments about access for dogs.

Back in 2012, over a half (56%) provided a comment on how their visit could be enhanced. The most commonly mentioned aspects related to facilities (18%) or improving the environment in some way, whilst 9% mentioned activities.

Around one in ten visitors (8%) mentioned a cleaner environment or improved security, with another 7% mentioning better/more trails/walks and 5% mentioning the café or refreshments.

Returning to the recent research; when asked if there was anything that interfered with their enjoyment of their visit to Fforest Fawr, two fifths (43%) reported that nothing had. This was significantly lower than the all Wales average of 68%, again illustrating that visitors to Fforest Fawr found more issues with this site compared to all Wales sites in general.

Most comments related to dog poo and litter, and these were by far the biggest issued for visitors. Around a quarter each reported that dog poo on the paths or litter around the site had interfered with the enjoyment of their visit (28% and 27%); both of these proportions were significantly higher than the all Wales position (4% and 5% respectively).

Other issues were mentioned by much smaller proportions of visitors, and included such things as not enough toilets or dogs running around off their leads (7% for each), poor weather (6%) and unclear signage (4%) – see Table 10 below.

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

Problem areas	Fforest Fawr 2015 %	All Wales 2015 %
Nothing	43	68
Dog mess on the paths / in play areas	28	4
Need more litter bins / recycling bins / too much litter	27	5
Toilets – not enough / closed / out of order / cleaner toilets / no changing	7	4
Dogs off leads / loose dogs / don't want dogs around	7	1
Wet / raining / windy (poor weather)	6	8
Signs unclear / need better signs / more maps	4	3
Complaints about other visitors	3	1
Too busy / too many kids	3	1
Too many cyclists / cyclists cutting up walkers	2	<1
Don't know	1	<1

Base: All visitors – Fforest Fawr 2015 (147); Fforest Fawr 2012 (213) All Wales (1,188).

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

- Need more shelters / sheltered picnic areas / picnic tables and benches
- Need more dog poo bins
- No café.

In 2012, the majority of visitors (88%) said nothing had interfered with the enjoyment of their visit, with just over one in ten (12%) providing a comment.

Comments mentioned by more than one person related to:

- Couples/people being engaged in improper public sexual activity (3% or 6 respondents);
- Litter issues/not enough bins (2% or 5 respondents);
- Dog fouling/no dog bins (1% or 3 respondents);
- Dogs not being kept under control/on a lead (1% or 3 respondents).

6. Site facilities

6.1 Importance of site facilities

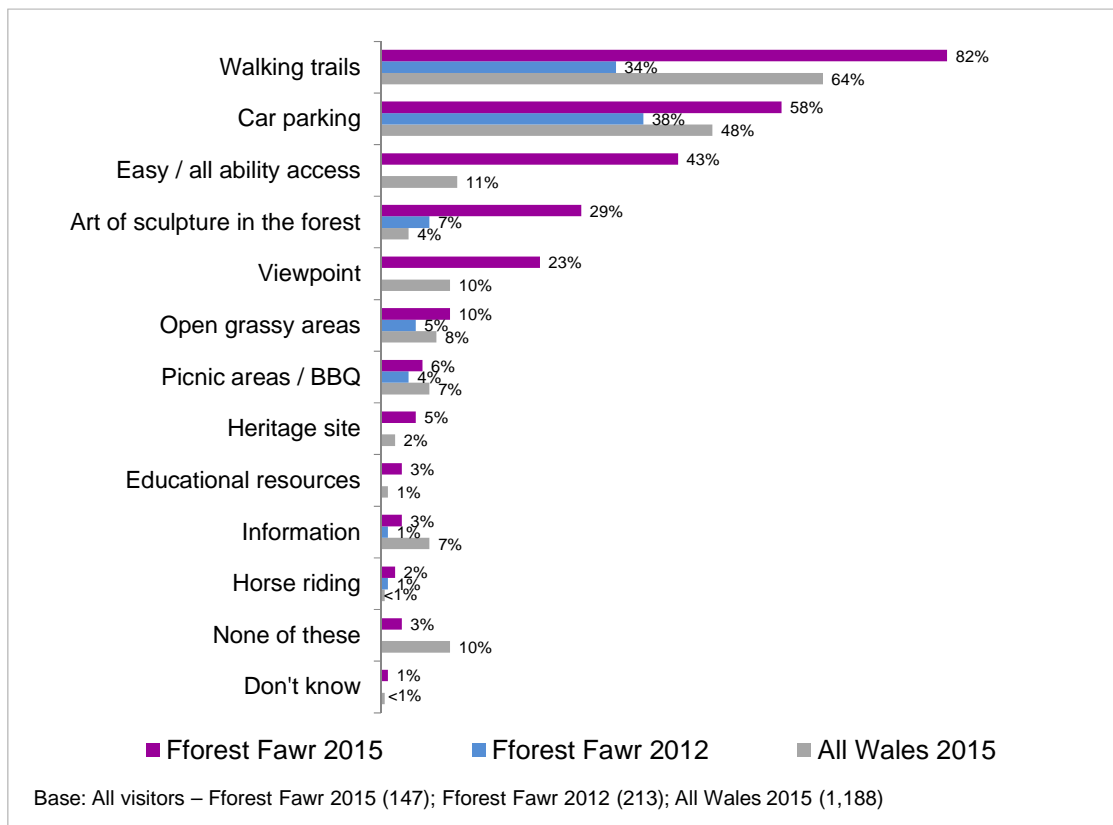
Visitors were presented with a list of facilities available at Fforest Fawr and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

On the whole, there were many more comments received in 2015 compared to 2012; walking trails were mentioned by the highest proportion of visitors to Fforest Fawr (82%), and this figure was much higher than the 2012 data (34%) and also higher than the 2015 all Wales average (64%).

Car parking was mentioned by just over half of visitors (58%), again much higher than the 2012 figure of 38% and also higher than the all Wales average of 48%.

Easy / all ability access was important to two fifths of visitors to Fforest Fawr in 2015 (43%); this was not mentioned in 2012 and only commented on by 11% across all Wales sites. The Viewpoint was important to a quarter (23%) of visitors (not mentioned in 2012); this compares to 10% across all sites – see Figure 12 below.

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 third of visitors when choosing to come to the site (38%). Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

The convenience of the location (being close to home) was mentioned by most (6%), followed by the fact that the site was considered dog friendly (4%).

Another 3% of visitors said that they had visited Fforest Fawr because they wanted to go walking / cycling, or that the site had good facilities – see Table 11 below.

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

Spontaneous comments on other factors influencing visit	Fforest Fawr 2015 %	All Wales 2015 %
Nothing	62	53
Live locally / convenient / easy to get to / easy access / close to me	6	5
Dog friendly / dogs can come off leads / dog facilities	4	4
Wanted to go walking / cycling	3	4
Good facilities	3	4
Good for the children / children like it / can run around and play	2	3
Beautiful scenery / views / natural beauty	2	4
Don't know	7	1

Base: All visitors – Fforest Fawr 2015 (144); All Wales (1,188)

Several other factors were mentioned by one or two visitors:

- Good weather / sunny / warm
- Shaded areas
- Outdoors / fresh air / open spaces
- Negative comments / recommendations
- Been before / come here a lot / good memories
- Good parking / cheap / free
- Specific event (e.g. Race for Life)
- Bad weather / wet / cold / windy
- Meeting / visiting with family and friends (bring family)
- A good / nice day out
- Relaxing / peaceful / tranquil / quiet
- Had some free time (over the Easter / Bank Holiday)

- Good for the children / can run around and play
- Easy to find / get to (transport links, signposting, shuttle bus to site etc.)
- Was just passing by / en route / was in the area
- Good value for money / cheap / free.

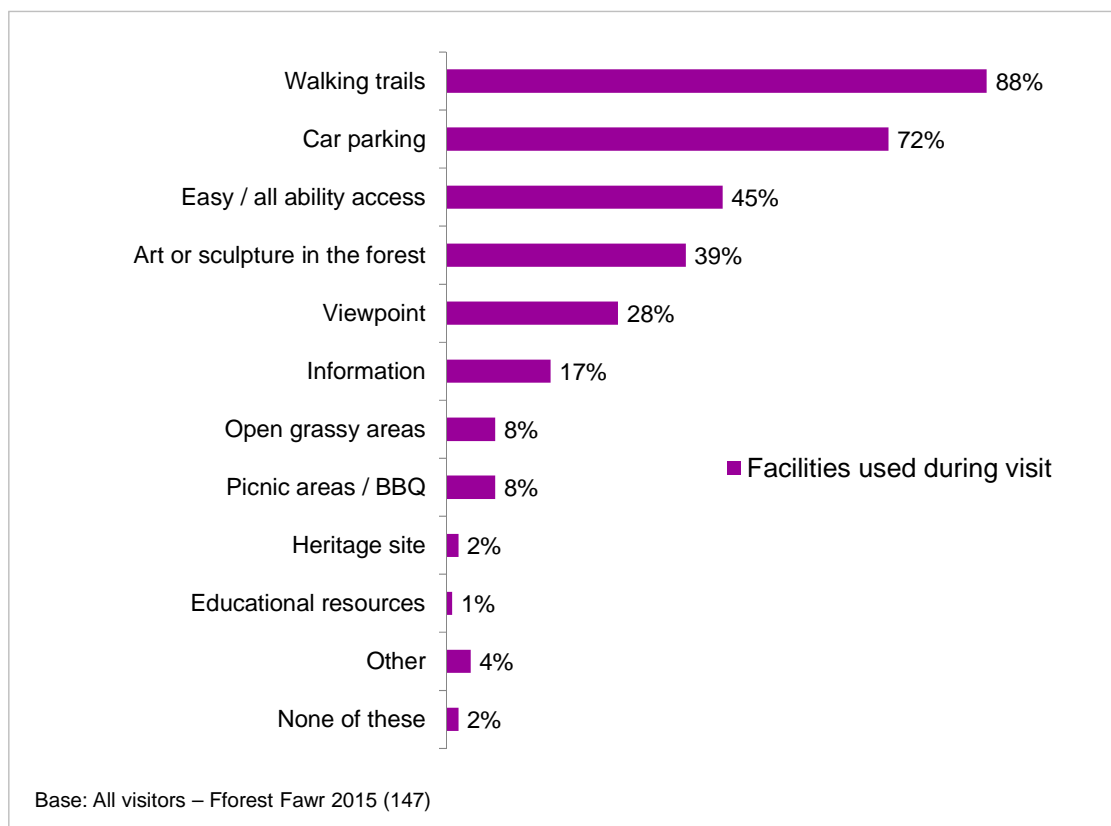
6.2 Facilities used

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. Walking trails were used by the highest proportion of visitors (88%), followed by car parking (72%).

The easy / all ability access was mentioned by just under half of visitors (45%), while two in five said that they had seen the forest art / sculptures (39%). Another three in ten mentioned making use of the Viewpoint at this site (28%) – see Figure 13 below for more details.

Figure 13: Q15a. Facilities used at Fforest Fawr 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 Fforest Fawr 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 facilities that received the highest scores were the walking trails and the forest art / sculptures; around half rated this as ‘excellent’ (48% and 45% respectively) whilst another third rated them as ‘very good’ (36% and 37% respectively).

The car parking, Viewpoint and easy / all ability access were felt to be excellent by around two in five visitors, with most other visitors giving these very good or good ratings.

Very few visitors negatively rated the facilities at this site; the only aspects to receive poor ratings, albeit by very small numbers, were the car parking (1%) and easy / all ability access (2%) – see Figure 14a below.

Figure 14a: Q15b. Rating of Fforest Fawr site facilities (where used) 2015 – main facilities used

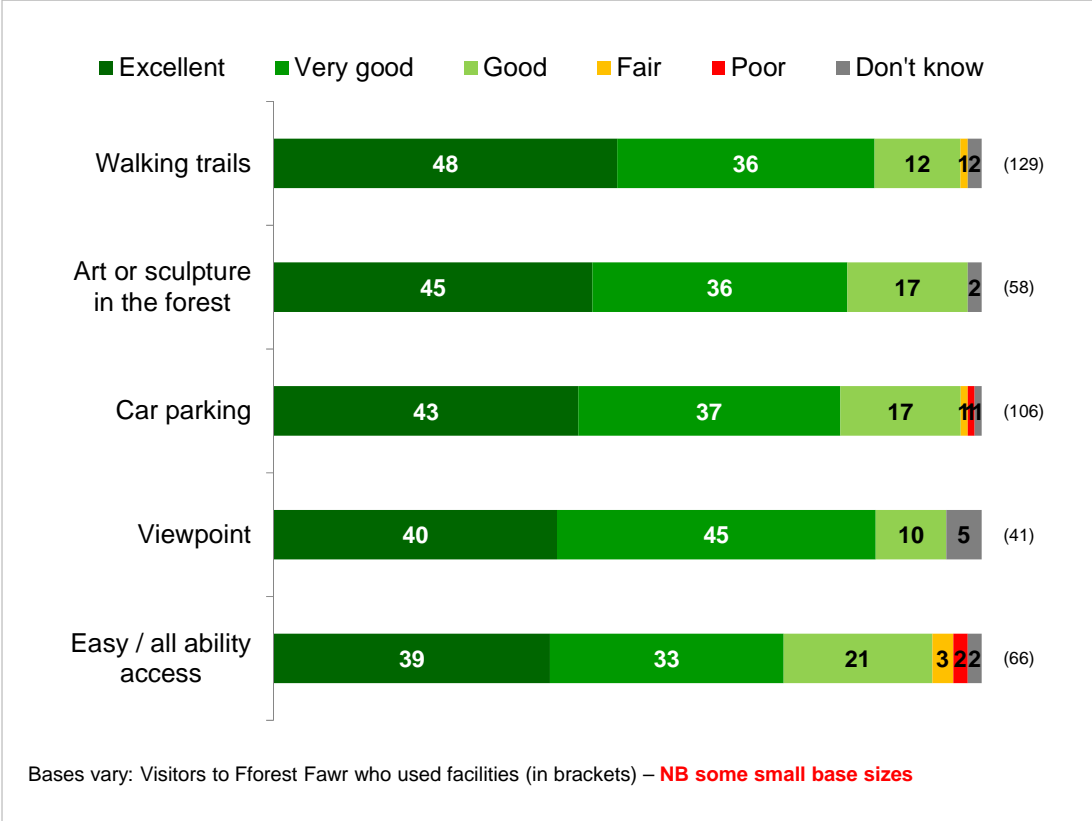


Table 12 compares the proportions giving ‘excellent’ ratings to the facilities used in 2014 compared to 2012, where they were mentioned in the previous survey.

Encouragingly, for all the facilities listed, the proportion who gave an ‘excellent’ rating has increased since the previous research, with the most significant increase seen in the proportions rating the easy / all ability access as excellent (33 percentage point increase).

Table 12: Q15b – Proportions rating facilities at Fforest Fawr as ‘Excellent’ 2014 vs. 2012

Facilities	Fforest Fawr 2015 %	Fforest Fawr 2012 %	% point change
Walking trails	48	27	+21
Art or sculpture in the forest	45	37	+8
Car parking	43	33	+10
Easy / all ability access	39	6	+33

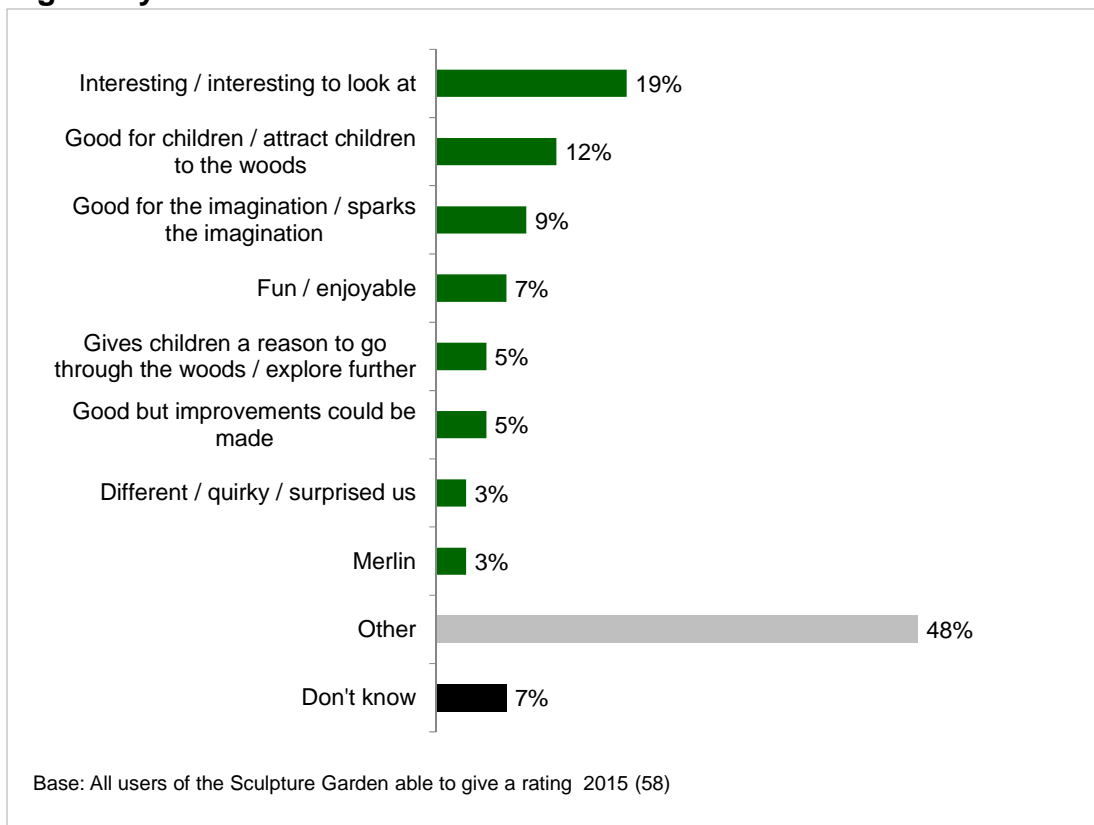
Bases vary: visitors using each facility – NB some small bases

On a related note: users of the forest art/sculptures were asked why they rated the positively (there were no negative ratings for this facility).

The main comment given was that the art / sculptures were interesting to look at (19%), with another 12% saying that they attracted children to use the woods and 5% saying they encouraged the children to explore further into the woods. Another 9% said that the art / sculptures were good for the imagination.

Smaller proportions said that the art / sculptures were fun or enjoyable (7%), different and quirky (3%). Most of the comments received were made by just one respondent, and have been grouped together as ‘other’ (48%) – see Figure 14b overleaf.

Figure 14b: Q20. Reasons why rated the Sculpture Garden positively / negatively



7. Sources of information used to plan visit

Visitors were asked where they found out about Fforest Fawr as a place to visit. This question was prompted and visitors could mention as many sources of information as were applicable – those given by more than 2% of visitors are outlined below.

Most visitors had always known about the site (67%); this proportion was in line with the 2012 research (71%) , but higher than the all Wales figure of 52%, and relates to the finding that most of the people visiting the site had been before.

Another fifth of visitors heard about Fforest Fawr through word of mouth (19%), again in line with the 2012 and all Wales figures (19% and 21% respectively).

Other sources of awareness (mentioned by small proportions) included just passing / en route (5%), Google / internet search engine (4%) and the Forestry Commission website (2%) – see Table 13 below.

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

Sources of information	Fforest Fawr 2015 %	Fforest Fawr 2012 %	All Wales 2015 %
Always known about it / been here before	67	71	52
Word of mouth	19	19	21
Just passing / en route	5	3	5
Google / other search engine	4	2	7
Forestry Commission website	2	-	<1

Base: All visitors – Fforest Fawr 2015 (144); Fforest Fawr 2012 (213); All Wales 2015 (1,188)

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

- Natural Resources Wales website
- Other websites
- TV
- Book / guide book
- Road signs
- Smartphone app
- Facebook
- Live locally
- Organised trip (with school / university).

8. Visiting other areas and attractions

Visitors to Fforest Fawr were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: the vast majority of visitors (95%) had visited at least one.

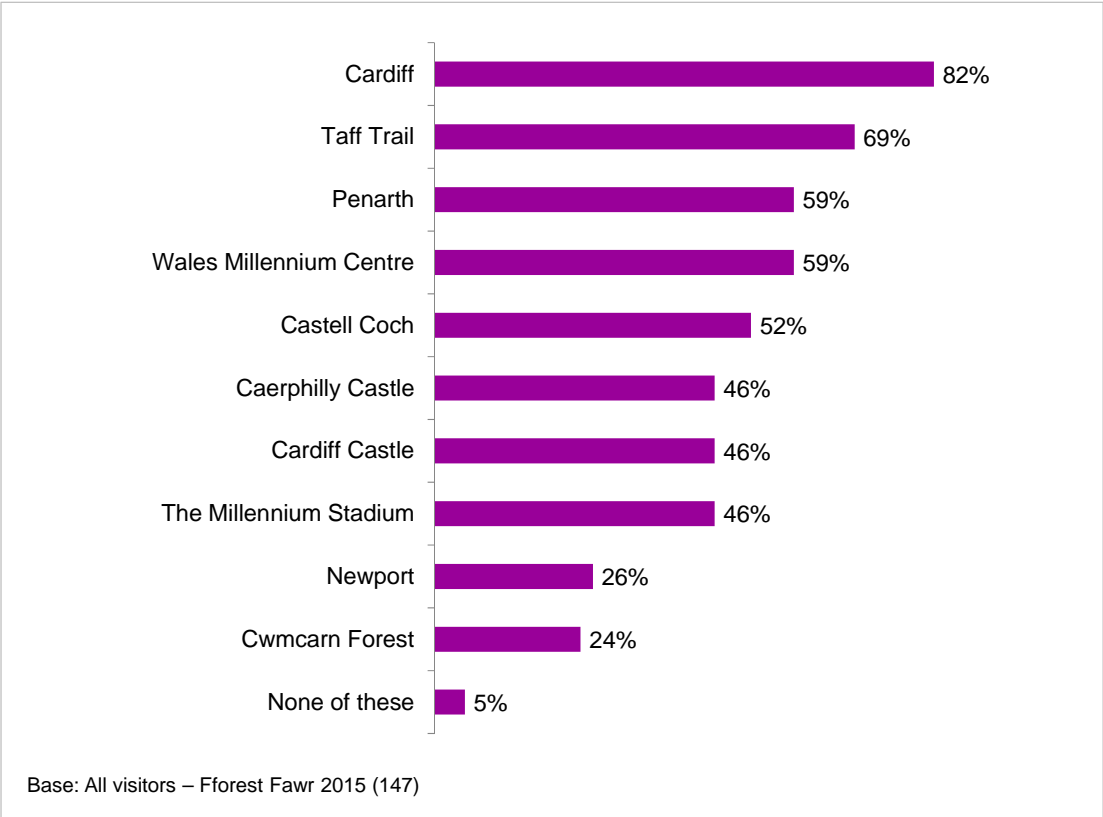
Cardiff stood out as the location that had been visited by most of those coming to Fforest Fawr (82%), and the nearby Taff Trail had been visited by 69%.

Around six in ten had visited Penarth (59%), while half had visited three local castles; Castell Coch (52%), Caerphilly Castle and Cardiff Castle (46% for each).

Roughly half has visited the two large attractions in Cardiff; the Wales Millennium Centre (59%) and the Wales Millennium Stadium (46%).


Around a quarter had visited Newport (26%) and Cwmcarn Forest (24%) – see Figure 15 below for more details.

Figure 15: Q19. Other areas / attractions visited 2015



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)
		Case No.	Point (1-2)	CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

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

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

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

(7)
1
2
3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

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

- English
- Welsh

(8)
1
2

ASK ALL

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

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

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

SHOWCARD A

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

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

(17)
1
2
3
4
5

SHOWCARD B

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

First visit

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

(18)
1
2
3
4
5
6
7
8
9

ASK ALL

SHOWCARD C

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

PROBE - Any others?

RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

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

RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED

ASK ALL

SHOWCARD C AGAIN

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

RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED

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

ASK ALL

SHOWCARD D

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

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

Don't know

(45)

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

INSTRUCTIONS:

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

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

SHOWCARD D AGAIN

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

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

ASK ALL

SHOWCARD E

<p>Q7 How or where did you find out about this site as a place to visit? CODE ALL MENTIONED</p>	<p>(55-58m)</p>
<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>	<p>(63-66m)</p>
<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

FFOREST FAWR

ASK ALL

SHOWCARD G3

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	Art or sculpture in the forest	4
B	Car parking	C
C	Easy / all ability access	H
D	Educational resources	I
E	Events	J
		(109-112m)
F	Heritage site	2
G	Horse riding	4
H	Information available / interpretation	5
I	Open grassy areas	9
J	Picnic areas / BBQ	C
K	Viewpoint	M
L	Walking trails	O
		(113-116m)

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

FFOREST FAWR

ASK ALL

SHOWCARD G3 AGAIN

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

SHOWCARD H

Q15b Now I would like you to rate each of the aspects of the site that you have used during today's visit. So how would you rate....?
 FOU: (140-231 FOR Q15)

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

ASPECTS USED		Q15a COL. A	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
		CIRCLE IF USED	Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(125-128m)								
A	Art or sculpture in the forest	4	1	2	3	4	5	6	7	(143)
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	Educational resources	I	1	2	3	4	5	6	7	(157)
E	Events	J	1	2	3	4	5	6	7	(158)
		(129-132m)								
F	Heritage site	2	1	2	3	4	5	6	7	(165)
G	Horse riding	4	1	2	3	4	5	6	7	(167)
H	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
I	Open grassy areas	9	1	2	3	4	5	6	7	(172)
J	Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
K	Viewpoint	M	1	2	3	4	5	6	7	(185)
L	Walking trails	O	1	2	3	4	5	6	7	(187)
		(133-136m)								
OTHERS (WRITE IN)										
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
	None of these	M								
	Don't know	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)

FFOREST FAWR

ASK ALL

FOU: (335-369 FOR Q19)

SHOWCARD K3 (W)

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

CODE ALL MENTIONED

- Caerphilly Castle
- Cardiff (city)
- Cardiff Castle
- Castell Coch
- Cwmcarn Forest
- Newport (city)
- Penarth (town)
- Taff Trail
- The Millennium Stadium
- Wales Millennium Centre

- None of these
- Don't know

(345-348m)

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

- L
- M

FOU: (370-410 FOR Q20)

ONLY TO BE ASKED OF VISITORS WHO HAVE USED AND RATED THE SCULPTURE TRAIL AT Q15a / Q15b, AND ASK THE QUESTION APPROPRIATELY

Q20 You just told me that you had used the sculpture trail, and you gave it a positive / negative rating? Why do you give it that rating?

RECORD VERBATIM

Don't know

(378-381m)

L

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 No 2	Supervisor signature

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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