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# Research Report

Quality of the Visitor  
Experience 2014

Garwnant



Prepared for:  
Natural Resources Wales /  
Forestry Commission England

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

<b>5.</b>	<b>Perceptions of the site .....</b>	<b>22</b>
5.1	Overall rating of the site as a place to visit.....	22
5.2	Overall rating of the site as safe and welcoming.....	23
5.3	Recommending the site as a place to visit.....	26
5.4	Favourite things about the site .....	28
5.5	Suggested improvements to the site.....	30
<b>6.</b>	<b>Site facilities .....</b>	<b>32</b>
6.1	Importance of site facilities.....	32
6.2	Facilities used .....	35
6.3	Rating of site facilities .....	36
<b>7.</b>	<b>Sources of information used to plan visit .....</b>	<b>39</b>
<b>8.</b>	<b>Visiting other areas and attractions .....</b>	<b>40</b>
<b>9.</b>	<b>Events at Garwnant .....</b>	<b>41</b>

## **Appendices**

Appendix I - Questionnaire

Appendix II - Explanation of social class

## **1. Executive summary**

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### **1.1 Quality of Visitor Experience Research**

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 in Wales.

A total of 42 sites will be surveyed: 14 per year (7 in each country). All selected sites in England are high usage, while sites in Wales consist of a combination of medium and high usage sites. In 2011, interviews were conducted at 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

This report summarises the findings from the 189 visitor interviews conducted at Garwnant in 2014. Throughout the report, comparisons have been made to the previous research conducted in 2011, and the all Wales average (aggregated data from all 7 sites surveyed in 2014).

### **1.2 Garwnant**

Garwnant is the Southern gateway to the Brecon Beacons National Park, which has recently been completely transformed to include a new restaurant, education & conference facilities, information centre and toilets.

Garwnant forest offers a range of activities and facilities including forest walks, children's play area, Forest Frenzy low rope assault course, mini-MTB mountain bike trails and a range of exciting events.

### **1.3 Perceptions of the site**

Perceptions of Garwnant as a place to visit were very positive and the 2014 findings were largely consistent with the 2011 survey. Across Wales, ratings were similarly very positive about each site. Just under half of visitors (48%) rated Garwnant site as excellent, which is just a little lower than the all Wales findings (55%) but consistent with 2011.

Ratings of how safe and welcoming Garwnant was, were similarly positive in 2014, remaining largely consistent with the all Wales average and 2011 findings. Almost half the visitors gave this measure an 'excellent' rating (48%); this is slightly lower than across all Wales sites (55%) but is again comparable with 2011 (46%).

When asked whether they would be likely to recommend Garwnant as a place to visit to a friend or relative (using a score of 0-10), scores for Garwnant and all Wales sites generally were extremely positive. As in 2011, the score for Garwnant was 9.2 out of 10 (compared with 9.4 all Wales average). Just over six in ten visitors (61%) gave Garwnant a rating of 10 out of 10.

#### **1.4 Strengths of the site**

Two favourite things about Garwnant stood out: the scenery and beautiful views (44%), followed by walks, paths and trails (36%). Both these aspects of the site were similarly popular in 2011, and remain so across Wales in 2014. Slightly different to 2011 was an increase in mentions of activities that are good for children (up from 21% to 30%) and a further 7% said their favourite thing at Garwnant was the play area – an aspect not mentioned at all in 2011.

#### **1.5 Areas for improvement**

Over four in ten visitors to Garwnant could not think of anything that would add to their enjoyment and only made positive comments (42%). This was similar to the all Wales average of 46%. The main suggested site improvement was a request for more play areas and children's facilities (14%). Other improvements suggested included better/more signage (7%), a better cafe/catering facilities (6%) or better picnic/BBQ facilities and better, cheaper parking (5% for each).

#### **1.6 Visitor profile**

Two-thirds of Garwnant visitors (67%) had visited the site before. This is very similar to the all Wales average of 71% repeat visitors however, is somewhat different to the findings in 2011 when 83% had been before.

The majority of Garwnant visitors (88%) were 'day trippers' whilst 12% were staying over. This was a little different to average, where typically across all Wales sites, 65% were day trippers and 34% were staying over.

Garwnant visitors tended to visit in fairly large groups – 4.7 on average (compared with 3.3 across Wales), with most of them visiting with children (75%). On average, only 37% of visitors to sites across Wales visited with children.

In keeping with the high proportion visiting with children, the gender profile at Garwnant was slightly skewed towards a more female, younger profile than average: females visitors accounted for 60% of all Garwnant visitors compared with 47% across all Wales, and half were aged under 45 (50%) compared with 42% across all Wales. Over half of visitors (54%) had children in the household which also a higher proportion than the all Wales average (34%).

Two thirds of visitors (67%) were in socio-economic grade ABC1 (professional and non manual workers) which is comparable to the all Wales visitor average of 72%. Furthermore, 69% were working (full time, part-time or self-employed) compared with 73% across Wales on average.

Slightly more visitors to Garwnant considered themselves to have a disability (15%) than across all Wales sites (9%).

As found across all Wales sites on average, the overwhelming majority of visitors to Garwnant were White British / Welsh / Irish (96%), with only a small number of visitors describing their ethnicity as 'White other nationality' (2%) or 'Black / Asian / Mixed' (2%).

## 2. Introduction

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### 2.1 Background

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

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

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

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

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

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



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

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

## 2.2 Research programme

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forests, woodlands and National Nature Reserves across England and Wales. In 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 in Wales.

A total of 42 sites will be surveyed: 14 per year (7 in each country). All selected sites in England are high usage, while sites in Wales consist of a combination of medium and high usage sites. In 2013, interviews were conducted at 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

Table 1 below details the sites surveyed in 2014, along with the number of interviews completed at each.

**Table 1: Interviewing sites and number of interviews conducted**

England		Wales	
Site	No. of interviews	Site	No. of interviews
Bedgebury	236	Alwen (M)	133
Delamere	240	Bwlch y Nant yr Arian (H)	190
Forest of Dean	230	Clocaenog (M)	136
Hamsterley	234	Coed y Brenin (H)	205
High Lodge, Thetford Forest	246	Cors Caron (H)	176
Salcey	239	Crychan (M)	125
Whinlatter	229	Garwnant (H)	189
<b>TOTAL</b>	<b>1,654</b>	<b>TOTAL</b>	<b>1,154</b>

\* H = High usage; M = Medium usage

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

The core interviewing period ran from March to October 2014. At Garwnant, interviewing took place between 29<sup>th</sup> March and 6<sup>th</sup> September, and a total of 189 interviews were conducted.

## **2.3 Report**

This report summarises the results of the interviews undertaken at Garwnant in 2014, and includes individual sites scores on key visitor measures. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites) and previous findings from the 2011 research (where applicable).

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

## **2.4 Data tables**

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

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

### 3. Visitor profile information

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#### 3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Garwnant. Table 2 overleaf details the profile of visitors, compared with the profile of visitors to all sites surveyed in Wales in 2014.

The profile of visitors to Garwnant was largely in line with that of the visitors to all the Wales sites, except Garwnant visitors tended to be slightly younger, more likely to be female and were more likely to have children.

The gender profile at Garwnant was skewed towards more females than males (60% of visitors were women compared with 40% men). This was quite different to the all Wales figures (47% female and 53% male).

In terms of age, Garwnant visitors tended to be slightly younger than all Wales visitors; half were aged 16-44 (50%) compared with 42% across Wales. Over half of visitors (54%) also had children in the household which was a much higher proportion than all Wales visitors on average (34%).

Two thirds of visitors (67%) were in socio-economic grade ABC1 (professional and non manual workers) which is comparable to the all Wales visitor average of 72%. Moreover, 69% were working (full time, part time or self-employed) compared with 73% across Wales on average.

Slightly more visitors to Garwnant considered themselves to have a disability (15%) than across all Wales sites (9%).

As found across all Wales sites on average, the overwhelming majority of visitors to Garwnant were White British / Welsh / Irish (96%), with only a small number of visitors describing their ethnicity as 'White other nationality' (2%) or 'Black / Asian / Mixed' (2%).

A fifth of visitors to Garwnant spoke Welsh (21%): 8% fluently and 13% non-fluently which is in line with the all Wales average of 22% Welsh speakers (11% fluent, 11% non-fluent) – see Table 2 overleaf for more details.

**Table 2: Profile of visitors by key demographics 2014**

		Garwnant %	All Wales %
<b>Gender</b>	Male	40	53
	Female	60	47
<b>Age</b>	16 – 24	1	3
	25 – 34	20	16
	35 – 44	29	23
	45 – 54	20	23
	55 – 64	17	17
	65+	12	17
	Refused	1	<1
<b>Social class</b>	AB	37	38
	C1	30	34
	C2	13	15
	DE	17	12
	Refused	3	1
<b>Working status</b>	Full-time employee (30+ hours per week)	49	56
	Part-time employee (<30 hours per week)	15	10
	Self-employed	5	7
	Full-time education	1	1
	Unemployed	3	1
	Permanently sick / disabled	4	2
	Retired	15	19
	Looking after home	5	2
	Other	1	<1
	Refused	1	1
<b>Limiting illness</b>	Yes – limited a lot	7	4
	Yes – limited a little	8	5
	No	84	90
	Refused	1	1
<b>Children in household</b>	Yes	54	34
	No	45	66
	Refused	1	<1
<b>Ethnicity</b>	White – British / Welsh / Irish	96	96
	White – Other	2	3
	Black / Asian / Mixed	2	1
	Refused	-	<1
<b>Welsh speaker</b>	Yes	21	22
	No	79	78

Base: All visitors – Garwnant (189); All Wales (1,154)

### 3.2 Group profile

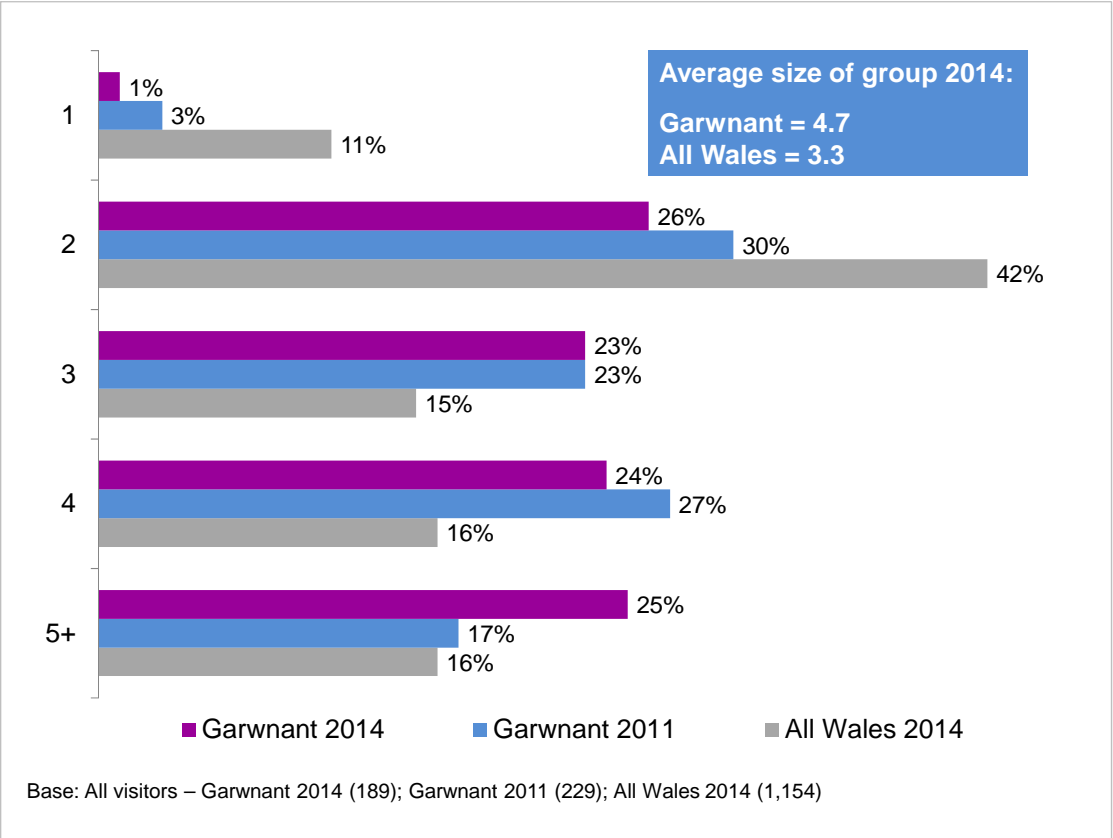
#### 3.2.1 Size of group

Group sizes were larger at Garwnant than average – 4.7 people compared with 3.3 people across all Wales on average.

Across Wales on average the most common group size was two people (42%) whereas at Garwnant, visitors were evenly distributed across all group sizes.

The main change since 2011 was in the proportion visiting in a group of 5 or more – up from 17% to 25%.

Figure 1: Q1. Total size of the group



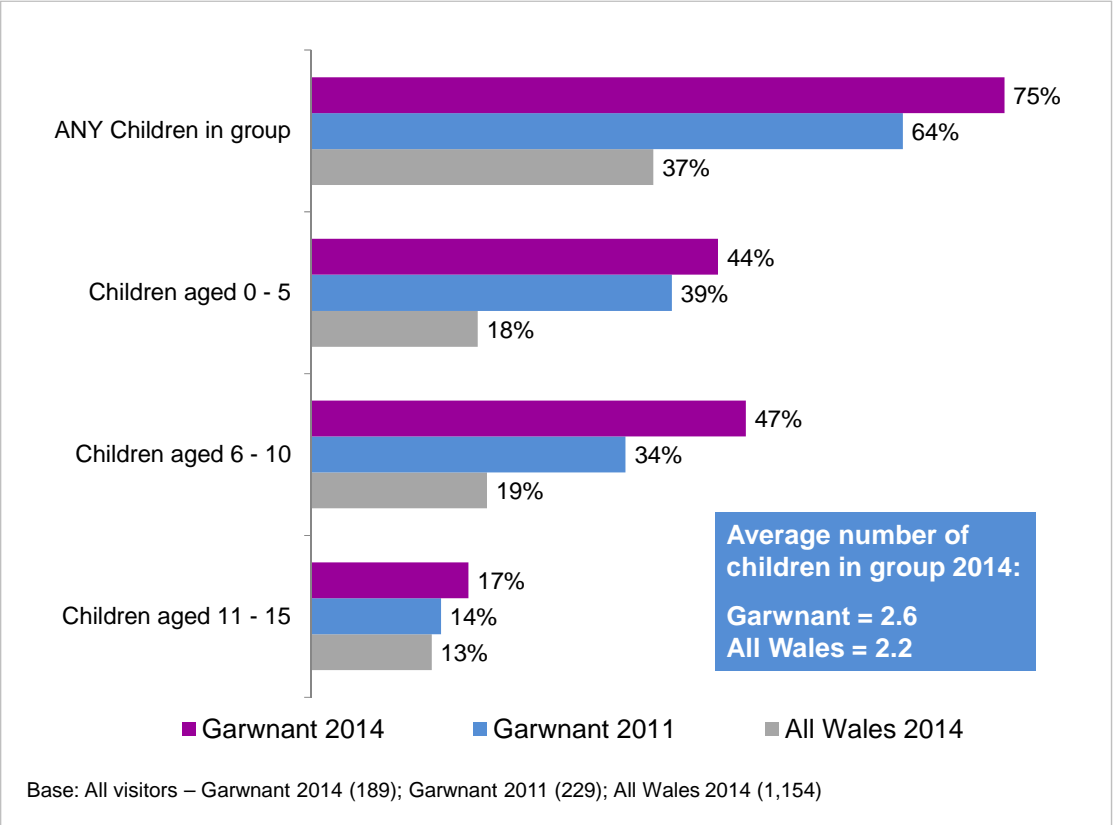
### 3.2.2 Composition of group

Three quarters of visitors (75%) were there with children, which is significantly more than seen in general across all Wales sites (37%). It is also an increase on the 2011 research (64%). As explored in more detail later, the playground and other facilities for children at Garwnant has influenced the group types most likely to visit.

The average number of children per group visiting Garwnant in 2014 was also slightly higher than the all Wales average (mean of 2.6 children per group at Garwnant compared with 2.2 all Wales).

As in 2011, children visiting Garwnant tended to be under 10 with relatively few 11-15 year olds visiting the site.

**Figure 2: Q1. Composition of group**



## 4. Profile of visit

### 4.1 Type of visit

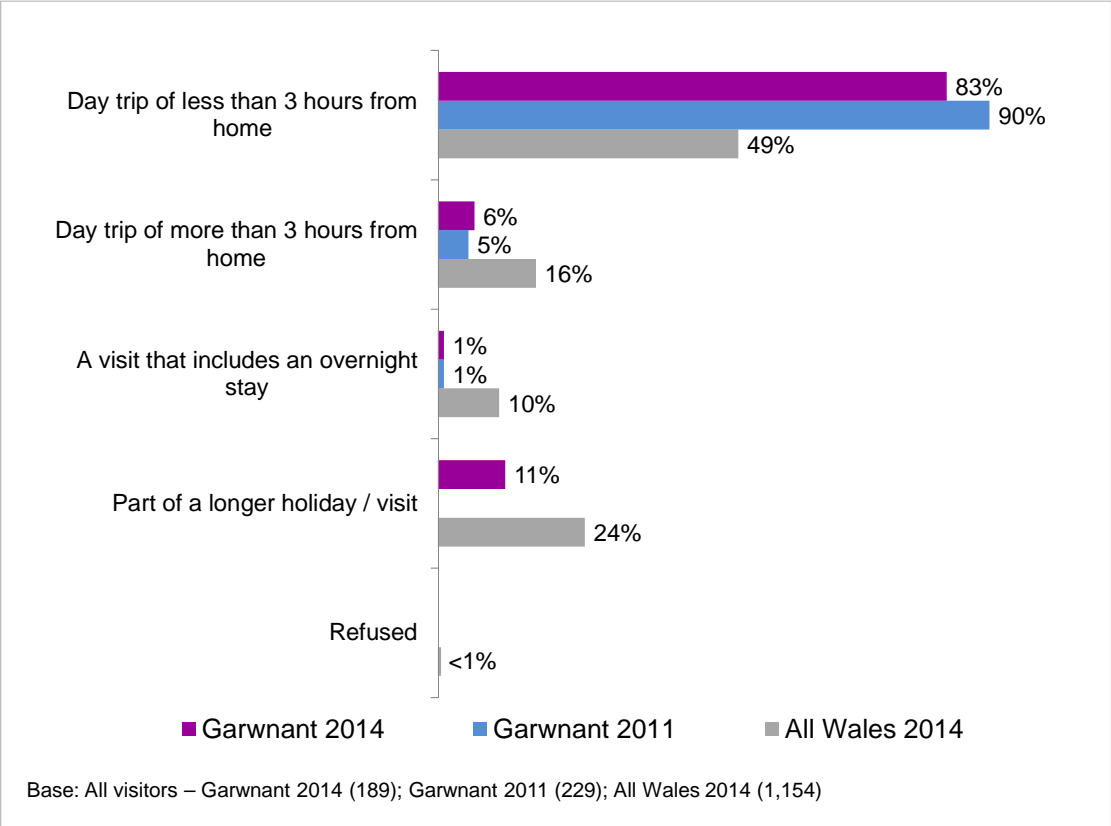
The majority of Garwnant visitors (88%) were 'day trippers' whilst 12% were staying overnight. This was a little different to average, where typically across all Wales sites, 65% were day trippers and 34% were staying overnight or as part of a longer holiday.

Most Garwnant visitors were on a short day trip from home, travelling for less than 3 hours (83%), which is similar to 2011 when 90% were on this type of visit. Across Wales on average less than half were on a short day trip from home (49%).

Consequently, very few visitors to Garwnant had travelled for more than three hours for a day trip to the site (6% vs.16% all Wales).

However, unlike the previous survey, there were now more staying visitors: 12% were staying in the area overnight or as part of a longer holiday, up from just 1% in 2011.

Figure 3: Q2. Type of visit



## 4.2 Visitor origin

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

Almost nine-in-ten Garwnant visitors came from within Wales (87%), most of who were from the Valleys (53%). Just under a fifth came from South East Wales (19%) whilst 10% were from Mid/West Wales.

Of the 13% who were visiting from outside of Wales, all bar two people were from England. The two others were visiting from abroad and were staying in the area as part of a longer holiday. Table 3 below and Figure 4 overleaf provide more details.

**Table 3: Q28b. Visitor origin 2014**

		Garwnant	All Wales
		%	%
<b>Home region</b>	North Wales	-	20
	Mid / West Wales	10	21
	South West Wales	4	5
	Valleys	53	10
	South East Wales	19	5
	Outside of Wales	13	40
<b>Home nation</b>	Wales	87	60
	England	12	38
	Rest of UK	-	<1
	Abroad	1	2
	Refused	-	<1

Base: All visitors – Garwnant (189); All Wales (1,154)



Figure 4: Map of visitor origin for Garwnant



### 4.3 Frequency of visits

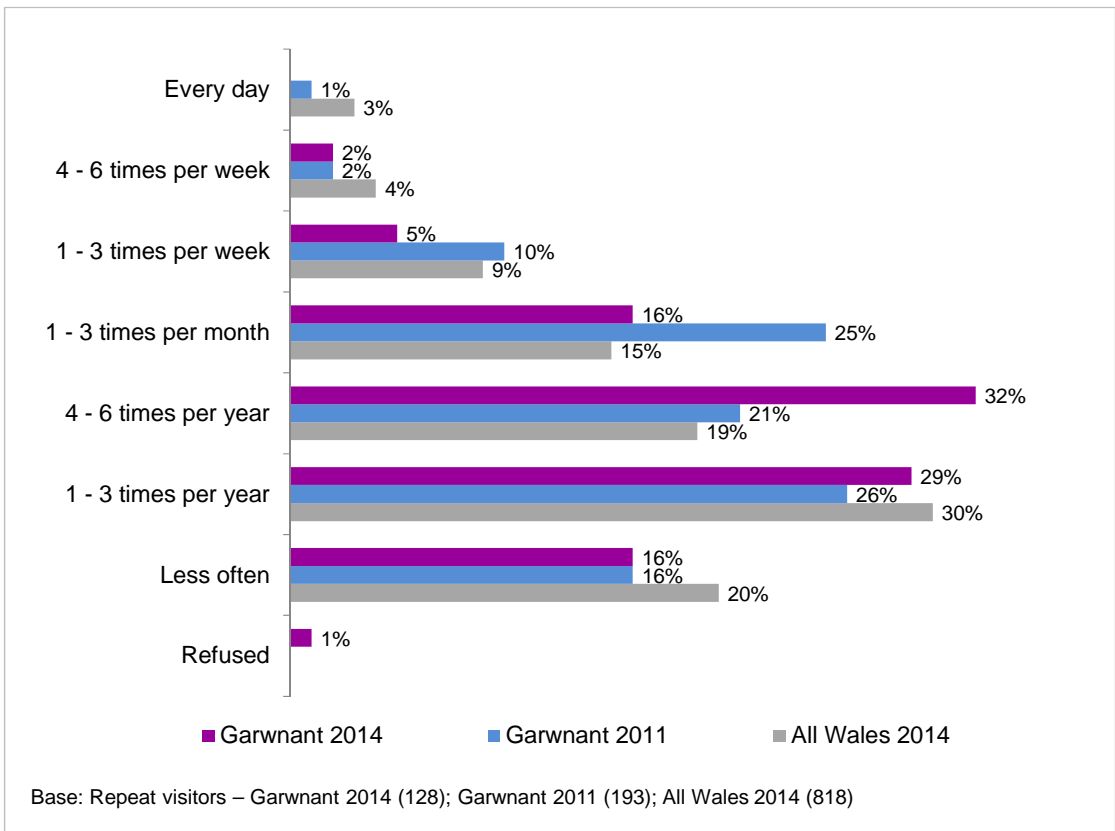
#### 4.3.1 First-time visitors

In 2014 a third (32%) of visitors to Garwnant were first-time visitors while two-thirds (67%) were on a repeat visit. This is very similar to the all Wales average of 29% first-time and 71% repeat visitors however, is somewhat different to the findings in 2011, when 17% were first time visitors and 83% had been before. Therefore the proportion of repeat visitors has decreased since the previous research.

#### 4.3.2 Repeat visitors

Focussing on repeat visitors, most of these visitors are fairly infrequent; the majority said they visited Garwnant on average 4-6 times a year or less (77%), whilst under a quarter (23%) visited monthly or more often. This is a decrease in visiting frequency since 2011, when 63% visited 4-6 times a year or less and 38% visited at least monthly.

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

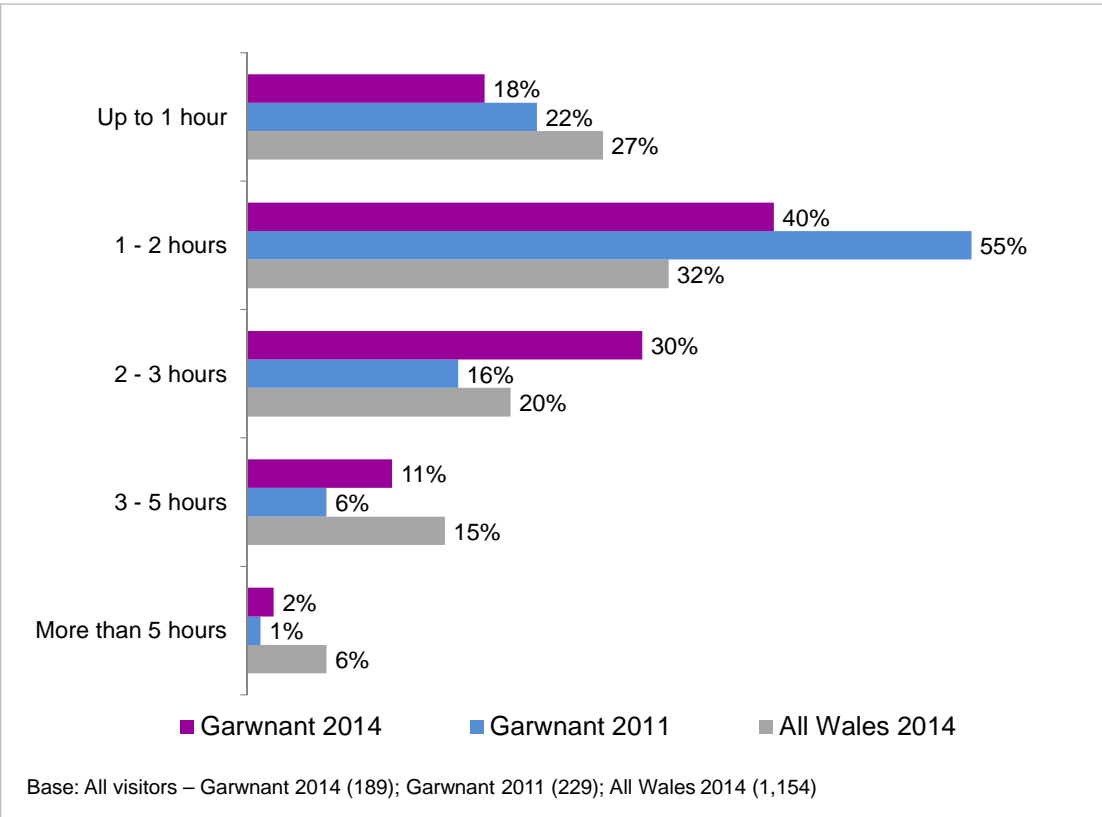


#### 4.4 Length of visit

Visitors to Garwnant were at the site an average of 2 hours and 1 minute, which is longer than in 2011 when an average of 1 hour 41 minutes was spent at the site. Visitors are therefore visiting less frequently but for longer periods of time when they do visit. Garwnant visitors now spend a similar amount of time to the average across all sites in Wales (2 hours and 7 minutes).

The changing lengths of time visitors spent at Garwnant can be seen below in Figure 6 and show an increase in those spending over 2 hours on their visit.

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



## 4.5 Activities undertaken

Visitors were presented with a list of activities and asked which ones they themselves, or others in their group, had either taken part in already, or intended to take part in during their visit. They were able to choose as many activities as applicable, and could choose activities of a similar nature (e.g. walking on trails and walking off trails).

Table 4 shows the combined figures for the following:

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

The most popular activity at Garwnant was walking generally (77%) which is unchanged since 2011 and remains higher than the all Wales average (69%). Walkers are split into those using sign posted trails (57%) those dog walking (22%) and those walking on non-signed routes (17%): again this is unchanged from 2011. Very few visitors to Garwnant cycled whilst there (9%): this is slightly fewer than in 2011 (13%) and is also somewhat lower than the all Wales average (22%).

The play area at Garwnant is extremely popular with 62% of visitors using this – up from 47% in 2011. This is no doubt related to the higher than average number of children visiting the site. A similar proportion enjoyed using the café facilities (59%), again an increase since 2011 (51%).

Other popular activities at Garwnant in 2014 included having a picnic or barbeque (31%, up from 11% in 2011), admiring the views (24% up from 4%), using the visitor centre/shop (21%, up from 12%) and photography (14%, up from 8%).

Due to the proportion taking part in walking activities, overall, the majority of visitors can be said to have taken part in ‘active’ activities (83%) which is similar to 2011 (80%) and to the all Wales average of 87%. See Table 4 overleaf.

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

	Garwnant 2014 %	Garwnant 2011 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	7	9	15
Cycling off trails or tracks	5	6	11
<b>TOTAL CYCLING</b>	<b>9</b>	<b>13</b>	<b>22</b>
Walking on a sign-posted trail	57	60	42
Walking but not following sign-posts	17	16	12
Dog walking	22	22	30
<b>TOTAL WALKING</b>	<b>77</b>	<b>76</b>	<b>69</b>
Using the play area	62	47	15
Using the café / restaurant / other catering	59	51	33
Picnic or barbeque	31	11	17
Admiring the views	24	4	26
Using the Visitor Centre or shop	21	12	14
Photography	14	8	11
Nature / natural history visit	7	2	7
Bird watching	4	5	15
Seeing something in the forest	2	-	2
A forest drive	2	-	2
Organised trip / event	2	7	2
Orienteering / Geocaching	1	1	<1
Running / jogging	1	-	3
Other	2	4	2
<b>Taken part in ACTIVE activities</b>	<b>83</b>	<b>80</b>	<b>87</b>

Base: All visitors – Garwnant 2014 (189); Garwnant 2011 (229); All Wales 2014 (1,154)

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

## 4.6 Length of time spent on activities

Those visitors who had taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking cycling activities (7), this has not been commented on.

As previously mentioned, visits to Garwnant lasted 2 hours and 1 minute on average. Those walking spent on average about half this time walking (1 hour and 2 minutes) which was a decrease in walking time since 2011 (when visitors spent on average 1 hr 20 mins walking).

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

	Total duration of visit		Time spent on any walking	
	2014 %	2011 %	2014 %	2011 %
Up to 30 minutes	6	-	29	11
31 – 60 minutes	12	22	32	27
1 – 2 hours	40	55	30	35
2 – 3 hours	30	16	7	6
3 – 5 hours	11	6	1	5
5+ hours	2	1	1	1
Don't know	-	-	-	15
<b>AVERAGE</b>	<b>2 hrs 1 min</b>	<b>1 hr 41 mins</b>	<b>1 hr 2 mins</b>	<b>1 hr 20 mins</b>

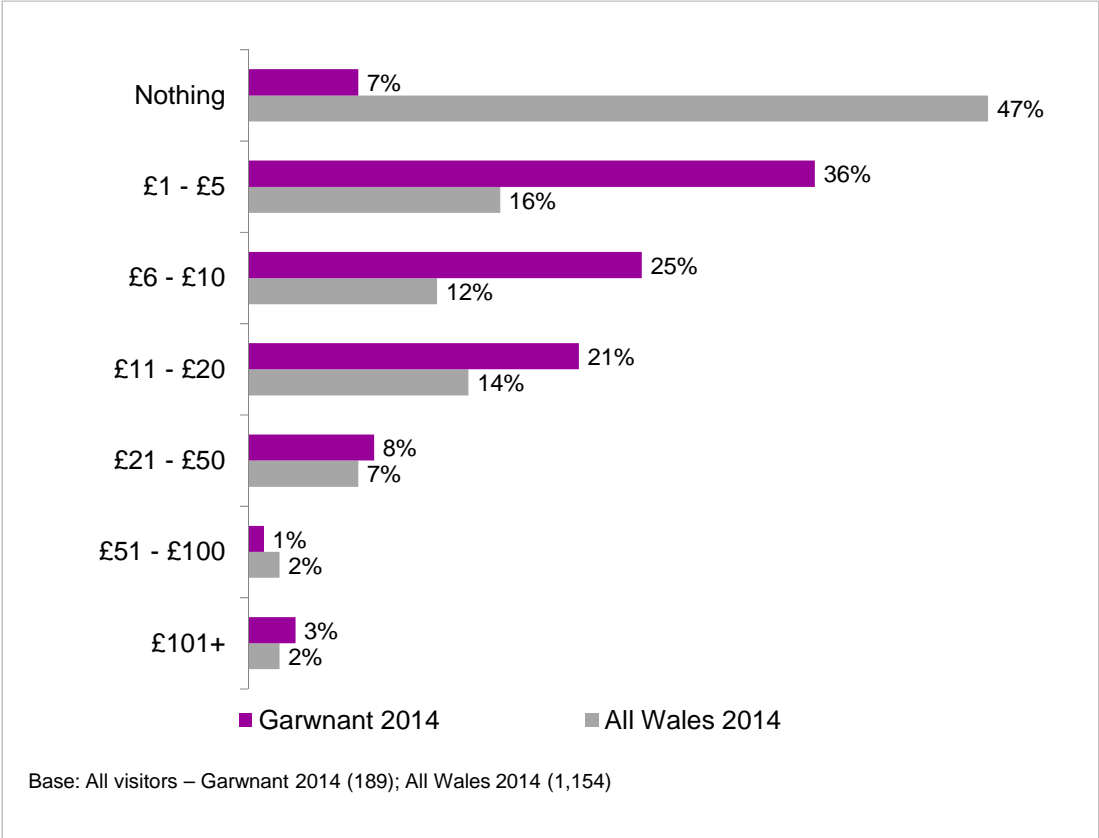
Base: All respondents - 2014 (189); 2011 (229), Respondents who walked - 2014 (130); 2011 (162)

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

Visitors to Garwnant 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. Just 7% of Garwnant visitors would not spend anything, and on average each visitor planned to spend £13.32. Across Wales, closer to half of visitors did not intend to spend anything (47%) and the average spend is around £2 lower at £11.15.

Figure 7 details how much would be spent on all aspects of the visit and shows that most visitors at Garwnant spend between £1 - £20 (82%) while just 12% intended to spend over £20. This pattern is largely comparable to the all Wales data.

**Figure 7: Q18a. Average spend per person/group at site.**



When looking at individual types of spending at the site, parking was the item most visitors to Garwnant were likely to spend anything on was parking (81%) with an average parking spend of £2.69, similar to the Welsh average of £2.06.

*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.*

The second most popular category to spend on was food and drink, with almost two thirds (64%) spending on this, considerably higher than the all Wales average of 39%. The amount visitors planned to spend on food and drink was £10.28 on average, almost double the all Wales figure of £5.53.

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

	% spending anything on items		Average spend on items £	
	Garwnant %	All Wales %	Garwnant £	All Wales £
Parking	81	41	£2.69	£2.06
Food and drink	64	39	£10.28	£5.53
Activities at the site	1	1	£0.02	£0.06
Souvenirs / gifts	4	4	£0.49	£0.54
Hiring equipment	-	2	-	£1.25
Anything else	1	4	£0.03	£1.77

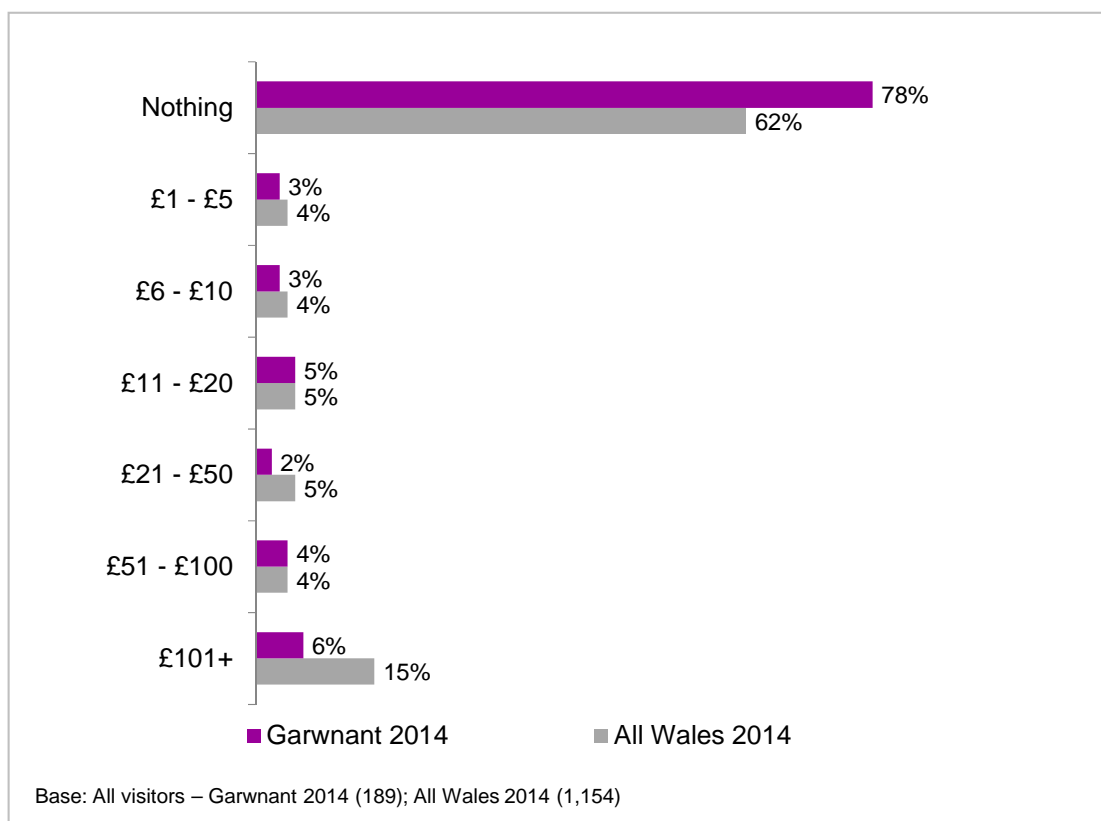
Base: All visitors – Garwnant 2014 (189); All Wales 2014 (1,154)

Visitors to Garwnant 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. On average, visitors said they would spend £30.75 in total, which is comparatively lower than the all Wales figure of £84.86, but understandable, as most Garwnant visitors were short day trippers with not many visiting as part of a longer holiday in the area.

Figure 8 shows the amount intended to spend, by price range, across all types of spending. At Garwnant, a higher proportion of visitors did not intend to spend anything in the area as a result of their visit (78%) compared to the all Wales average (62%). At the other end of the scale, a lower proportion of Garwnant visitors intended to spend larger amounts of £101 or more (6%) compared to all Wales (15%).



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



Transport, food and drink and parking were the three areas of most intended spend in the Garwnant area as mentioned by 14%, 12% and 7% respectively. A further 6% said they would spend on accommodation.

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

	% spending anything on items		Average spend on items £	
	Garwnant %	All Wales %	Garwnant £	All Wales £
Transport	14	20	£4.24	£9.83
Food and drink	12	27	£7.18	£26.37
Parking	7	10	£0.66	£1.56
Accommodation	6	15	£14.96	£50.24
Admissions to other attractions	3	5	£1.65	£4.97
Souvenirs / gifts	5	7	£1.81	£2.68
Hiring equipment	1	1	£0.16	£0.20
Anything else	2	3	£0.24	£2.37

Base: All visitors – Garwnant 2014 (189); All Wales 2014 (1,154)

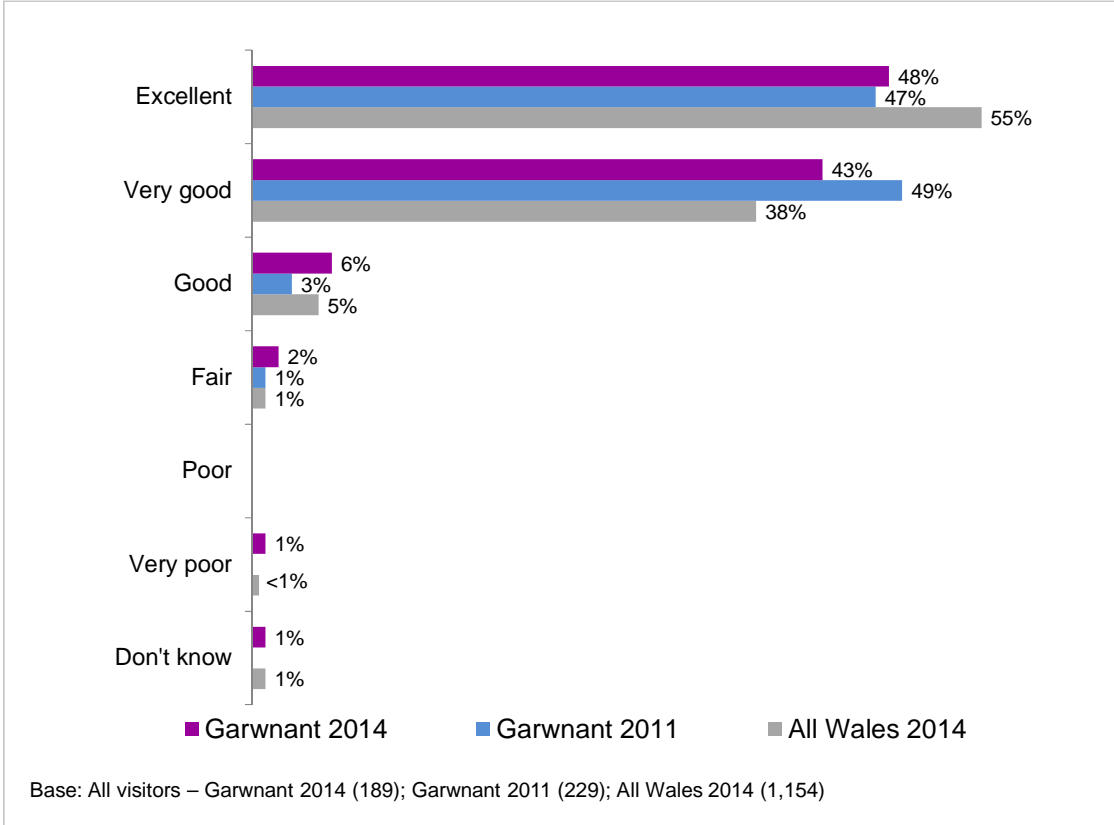
## 5. Perceptions of the site

### 5.1 Overall rating of the site as a place to visit

Perceptions of Garwnant as a place to visit were very positive and the 2014 findings were largely consistent with the 2011 survey. Across Wales, ratings were similarly very positive about each site. Just under half of visitors (48%) rated Garwnant site as excellent, which is just a little lower than the all Wales findings (55%) but consistent with 2011.

Over two fifths (43%) gave the site a rating of very good and 6% rated it as good. Only 3% gave a less than positive rating to Garwnant – 2% fair and 1% very poor.

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



Adult-only visitors were slightly more likely to give an excellent rating (54%) than those visiting with children (46%). Those visiting with young children were the least likely to say the site was excellent (41% of those with 0-5 year olds) compared with those visiting with 11-15 year olds (53%).

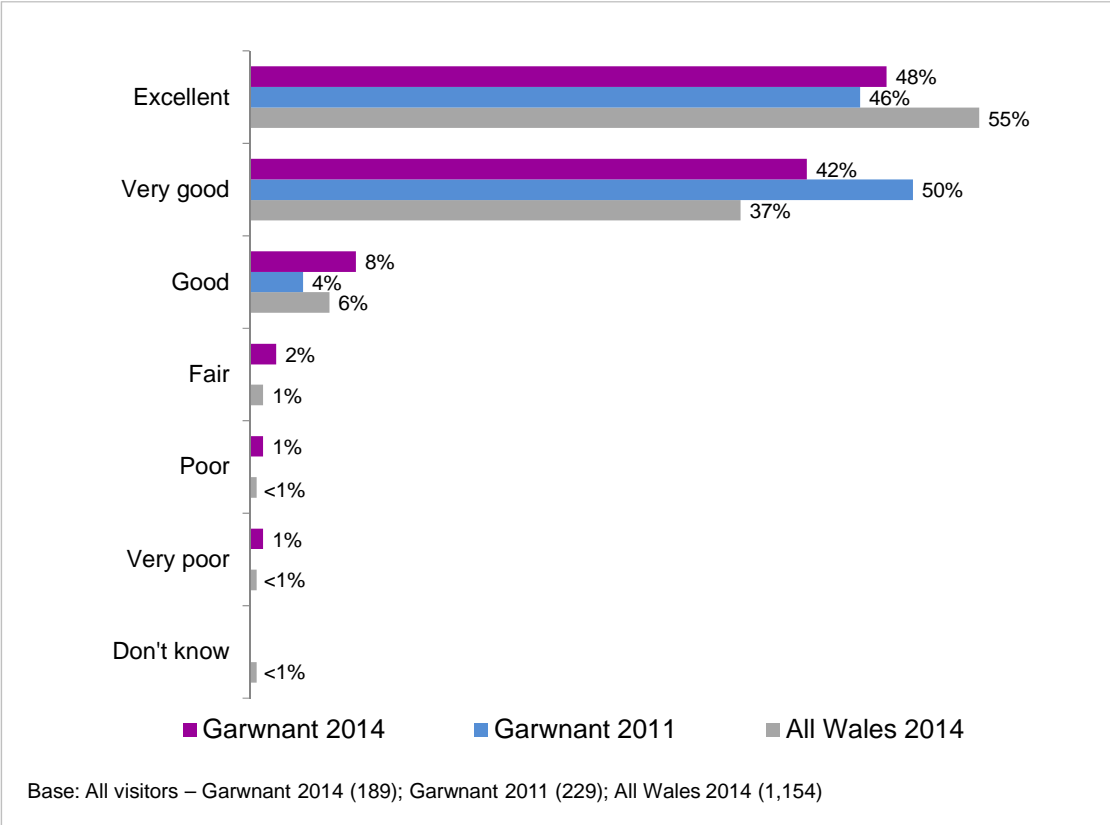
## 5.2 Overall rating of the site as safe and welcoming

Ratings of how safe and welcoming Garwnant was, were similarly positive in 2014 remaining largely consistent with the all Wales average and 2011 findings. Almost half the visitors gave this measure an 'excellent' rating (48%); this is slightly lower than across all Wales sites (55%) but is consistent with 2011 (46%).

Unlike in 2011, a very small proportion at Garwnant did give a negative rating to how safe and welcoming the site felt in 2014: 2% said it was fair on this measure and a further 2% said it was poor/very poor.

Overall, the vast majority remain very positive about Garwnant feeling safe and welcoming and the small changes since 2011 should not cause concern at this stage.

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



Visitors were asked why they had given that rating, and the answers mentioned by 2% or more of respondents giving a positive rating are detailed in Table 7 below. This question was unprompted and visitors could mention more than one aspect of the site.

A good, safe place for the kids to play or run around was the most often mentioned reason for the positive rating given, at 28% (almost double the all Wales average of 15%), and a similar proportion said it was a safe environment generally for all people. The scenery and beautiful views were mentioned by over a fifth of visitors (22%) followed by it being clean and tidy, litter free (18%) and with good quality facilities (17%).

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

	Garwnant 2014 %	All Wales 2014 %
Good, safe place for the kids to play / run around	28	15
Safe environment generally for all people	27	28
The scenery / views / beautiful environment	22	41
Clean / tidy / well maintained / litter free	18	17
Good quality facilities / amenities	17	14
Fresh air / open space / plenty of space / freedom	15	22
Well laid out / well organised / good set-up	14	14
Peaceful / pleasant / tranquil / relaxing / welcoming	12	32
Well signposted / good maps / info boards	10	16
Friendly / helpful staff or rangers	9	9
Live locally / convenient / easy to get to / close	6	8
Good car parking	6	5
Good provision of paths / trails and tracks	4	16
Other visitors are friendly	4	6
Away from roads / no cars / cars drive slowly	3	2
Good café / catering	2	1
Plenty to do / has everything you want	2	1
General positive comments	5	2
Some negative comments	4	3

Base: Visitors rating the site as excellent, very good or good – Garwnant 2014 (184); All Wales 2014 (1,137)

Visitors who had given a fair or negative rating, only amounted to 5 people and so represent too small a sample size to be reliable, nevertheless the answers given included:

- Needs better signage (2 people)
- No mobile signal (1 person)
- Problems with dogs (1 person)

### 5.3 Recommending the site as a place to visit

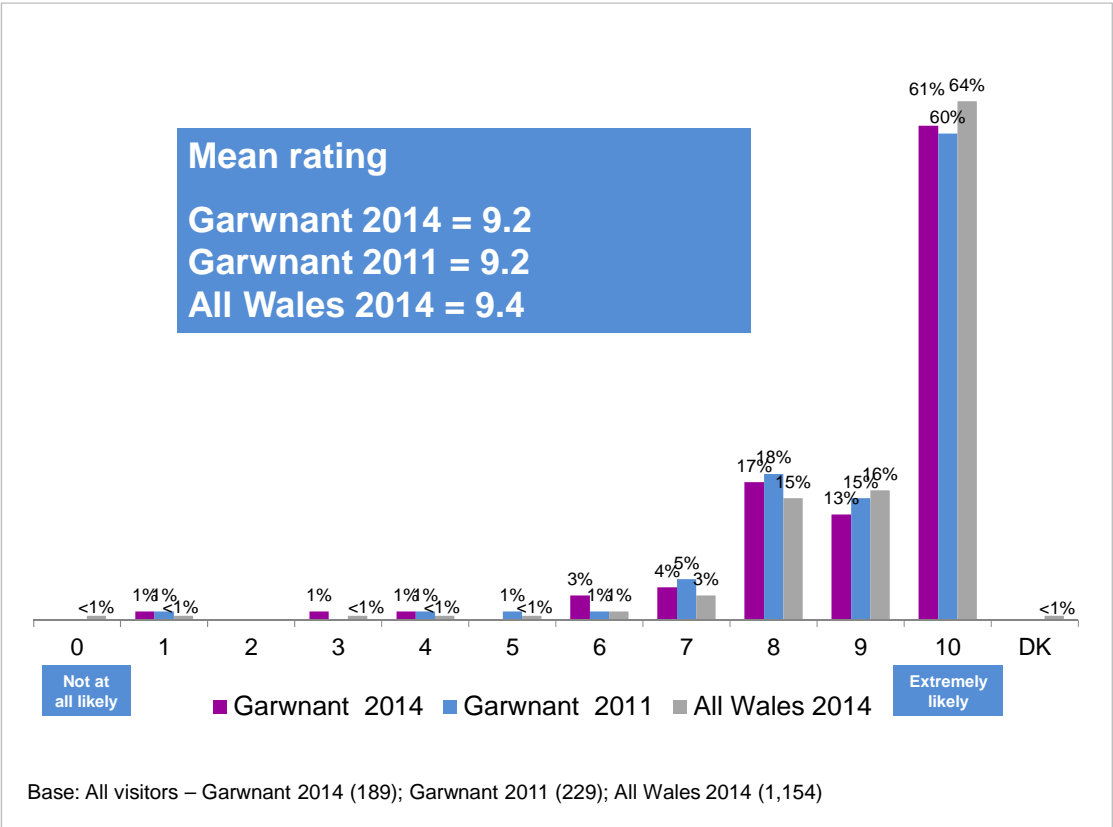
Visitors were asked whether they would be likely to recommend Garwnant as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

As in 2011, the score for Garwnant was extremely positive at 9.2 out of 10, which is very similar to the all Wales average of 9.4.

Just over six in ten visitors (61%) gave rating of 10 out of 10, which was consistent with the previous Garwnant study in 2011 (60%) and comparable with the all Wales score (64%).

A further 13% scored Garwnant as 9 out of 10 meaning in total, three-quarters of visitors were extremely positive about the site. Of the remainder, just over a fifth (21%) gave a 'passively' positive score of 7 or 8 out of 10 and just 5% were negative in any way.

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



These results can be analysed further by using a Net Promoter Score (NPS), which divides visitors 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 Garwnant is 70 which is a little lower than the 2011 result of 74, and the all Wales score of 78.

## 5.4 Favourite things about the site

Visitors to Garwnant were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 8 overleaf.

Two favourite things about Garwnant stood out: the scenery and beautiful environment (44%), followed by walks, paths and trails (36%). Both these aspects of the site were similarly popular in 2011, and remain so across Wales in 2014. Slightly different to 2011 was an increase in mentions of activities that are good for children (up from 21% to 30%). A further 7% said their favourite thing at Garwnant was the play area – an aspect not mentioned in 2011.

Peace and tranquillity was mentioned by 30%, although this was a slight drop since 2011 (39%). Just under a quarter mentioned the good on-site facilities/BBQ /shop whilst a fifth (19%) liked the fact it was close to home or convenient to get to – see Table 8 overleaf.



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

Activities	Garwnant 2014 %	Garwnant 2011 %	All Wales 2014 %
Scenery / views / beautiful / natural	44	39	47
Walks / paths / trails	36	34	34
Peace / tranquillity / relaxation / atmosphere	30	39	49
Activities that are good for the children	30	21	9
Good on-site facilities / BBQ / shop	24	21	16
Close to home / convenient location	19	14	12
Fresh air / being outside	16	16	17
Safe environment	16	12	10
Opportunity to spend time with family / friends	11	7	4
Clean / well looked after	10	14	9
Like forests / trees / variety of trees and plants	7	6	10
Play area	7	-	2
Exercise / keeping fit	6	4	7
Been before / wanted to come again	6	2	6
Cycle trails / freedom / opportunity to cycle	5	6	16
Plenty / cheap / good parking	5	1	4
Cost / value for money / free	5	-	2
Café / restaurant	5	1	3
Lots to see and do	5	6	3
Ideal for dogs / dog friendly / safe for dogs	5	1	4
Wildlife / bird watching	4	8	18
Good accessibility	4	-	4
Open space / plenty of space	4	-	1
Good toilets	3	-	1
Sculptures /art	2	-	1
Not crowded / not too many people	2	-	3
Rivers / creeks / waterways	2	1	3
Remote / away from traffic / no cars	2	-	1
Something different / a change	2	-	1

Base: All visitors – Garwnant 2014 (189); Garwnant 2011 (229); All Wales 2014 (1,154)

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

- The weather
- Helpful, pleasant staff
- Well laid out
- Well signposted
- Something for everyone.

## 5.5 Suggested improvements to the site

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

Over four in ten visitors to Garwnant could not think of anything that would add to their enjoyment and only made positive comments (42%). This was similar to the all Wales average of 46%.

Suggestions for site improvements were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. The main improvement requested was for more play areas and children's facilities (14%). Other improvements suggested included better/more signage (7%), a better cafe/catering facilities (6%) or better picnic / BBQ facilities (5%) and better parking/cheaper/free parking (5%).

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

	Garwnant 2014 %	All Wales 2014 %
<b>Nothing / general positive comments</b>	<b>42</b>	<b>46</b>
More activities for children / play areas	14	4
Improve signage / more or better maps	7	6
Improve cafe / catering	6	3
Better parking (easier, more, cheaper, free)	5	3
More picnic / BBQ facilities	5	3
More dog poo bins/remove dog poo	3	7
More seating	3	3
Better weather / more sunshine	3	2
Have a cashpoint / accept card payments	3	1
Bike hire / better bikes / bike child seats	3	1
Better toilet facilities / shower / changing area	2	6
More trails, paths, cycle tracks	2	4
More bins, recycling, less litter	2	4
More information on vegetation / wildlife	2	2
Cheaper café	2	1
Negative comments about access for dogs	2	1

Base: All visitors – Garwnant 2014 (189); All Wales 2014 (1,154)

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

- Longer, more challenging paths, tracks and trails
- Improve maintenance of paths
- More sheltered areas
- Better public transport / shuttle bus to the site
- Plant more trees
- Longer opening hours.

When asked if there was anything that interfered with their enjoyment of the site, almost three quarters reported that nothing had interfered with their enjoyment (71%). This was the same proportion as the all Wales average (70%). The comments made were mentioned by very small proportions, and Table 10 below details those made by 2% of the sample or more.

The poor weather interfered with enjoyment for one in ten visitors (10%) whilst one in twenty's enjoyment was spoilt by poor service or long queues in the cafe (5%). A further 2% also mentioned that they found the cafe expensive and the same proportion said there was not enough choice on the menu there.

Just 3% of visitors found the signage at the site to be a problem, whether more signs were needed or clearer maps, while 2% each mentioned the expensive parking or problems with the parking such as faulty machines or a lack of spaces.

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

	Garwnant 2014 %	All Wales 2014 %
<b>Nothing</b>	<b>71</b>	<b>70</b>
Wet / raining / windy (poor weather)	10	8
Poor service in café / long queues / inconvenient opening hours	5	1
Signs unclear / need better signs / maps	3	3
Car park expensive / should be free parking	2	1
Dog mess on paths / in play areas	2	4
Problems with car parks (faulty machines, limited spaces)	2	1
Issues with toilets (not enough, closed, dirty etc.)	2	2
Café expensive	2	<1
Not enough choice on the menu / not enough food available	2	<1

Base: All visitors – Garwnant 2014 (189); All Wales 2014 (1,154)

## 6. Site facilities

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### 6.1 Importance of site facilities

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

Almost half mentioned the play area and children's facilities, up from 31% in 2011 to 49%. Naturally, this feature of the site was of more importance to those visiting with children, of whom 64% said this had been important in their decision to visit.

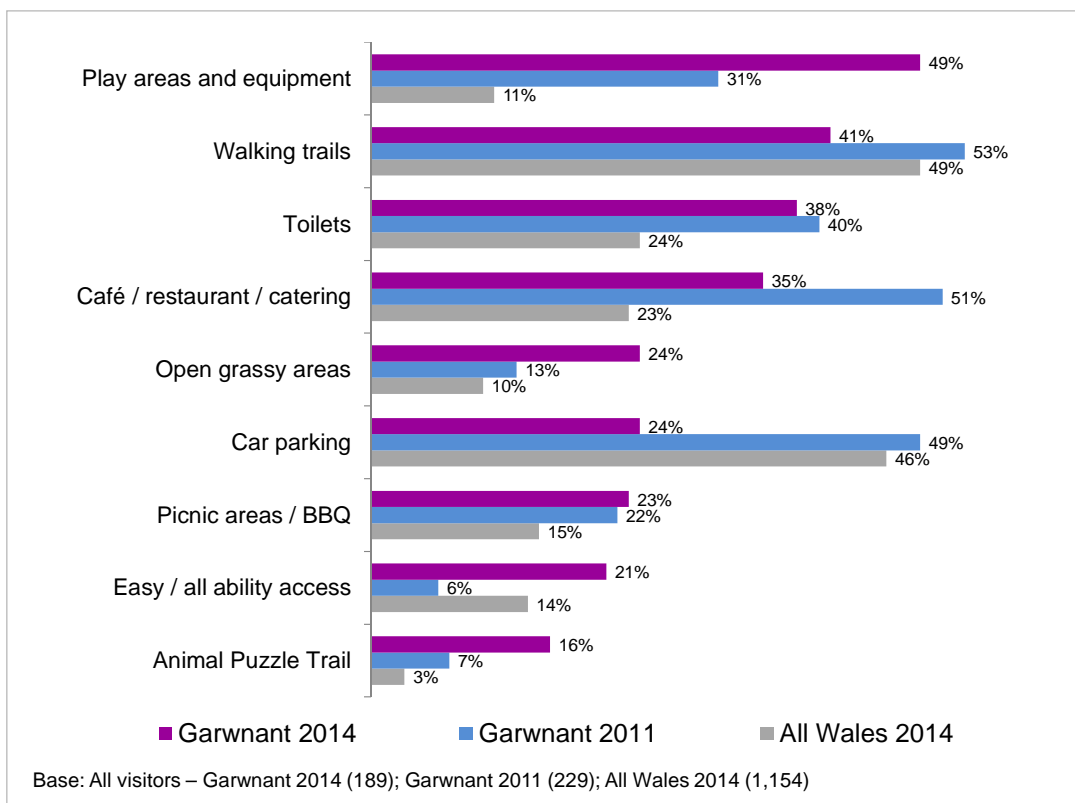
The second most often mentioned feature at Garwnant was the walking trails (41%) and this was the site feature of most importance to those visiting without children (60%).

Overall, the toilet facilities were the third most important feature in the decision to visit (38%), whilst the café/catering attracted a similar proportion at 35%. However, the café had been a more important draw to visit in 2011, when over half mentioned this feature of the site (51%). There has also been a change in the proportion mentioning the car parking, which has halved since 2011 (now down to 24% from 49%).

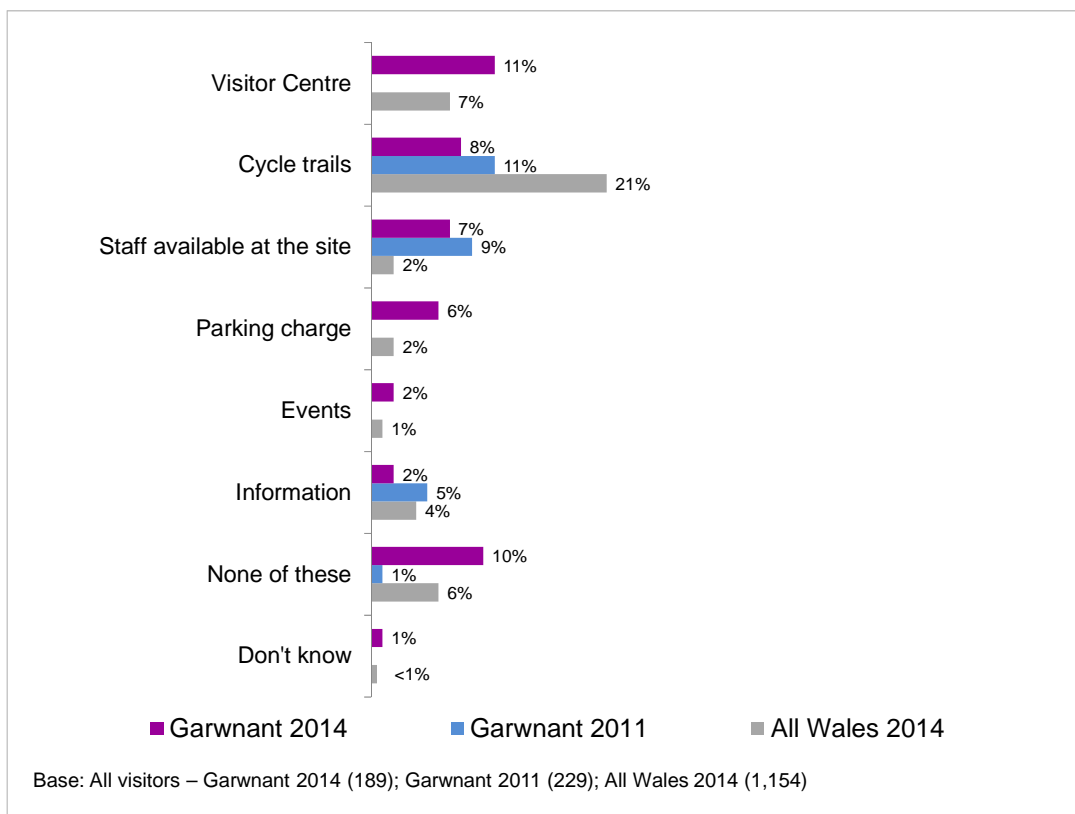
As well as the play area, the other main aspects that were more important to the decision to visit in 2014 than 2011 included the open grassy areas (24%), the ease of access (21%) and the Animal Puzzle Trail (16%). All three of these being child-friendly attractions.

Other changes at the site since 2011 noted by visitors in 2014 included just over one in ten (11%) who said the Visitor Centre had been important in their decision to visit and similarly, 6% who mentioned the car park charges this year. See Figures 12a and 12b overleaf:

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



**Fig 12b: Q13. Importance of different facilities in deciding to visit, cont'd**



Certain other factors (apart from site facilities) were important to around a third of visitors (31%) when choosing to come to the site. Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below in Table 11.

The main mentions were that Garwnant was close to home and convenient to get to (16%), the good weather that day (13%), it was good for the children to run around and play there (12%) or they were just passing by / it was en route to where they were going (10%).

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

	Garwnant 2014 %	All Wales 2014 %
<b>Nothing</b>	<b>31</b>	<b>60</b>
Close to home / local / convenient	16	7
Good weather / sunny / warm	13	4
Good for the children / can run around and play	12	4
Was just passing by / en route	10	5
Outdoors / fresh air / open spaces	7	2
Been before / come here a lot / good memories	6	2
Meeting / visiting with family and friends	5	3
Good facilities	4	3
A nice day out	4	2
Wanted to go walking / cycling	4	3
Dog friendly / dogs can come off leads / dog facilities	3	5
Good value for money / cheap / free	3	1
Good parking / cheap / free	3	1
Relaxing / peaceful / tranquil / quiet	2	3
Close to where I am staying (staying visitors)	2	2
Beautiful scenery / views / natural beauty	2	2
Easily accessible / easy to get around	2	1
Family / friend recommended it	2	1
Easy to find / get to (transport links, signposting etc.)	2	1

Base: All visitors – Garwnant 2014 (189); All Wales 2014 (1,154)

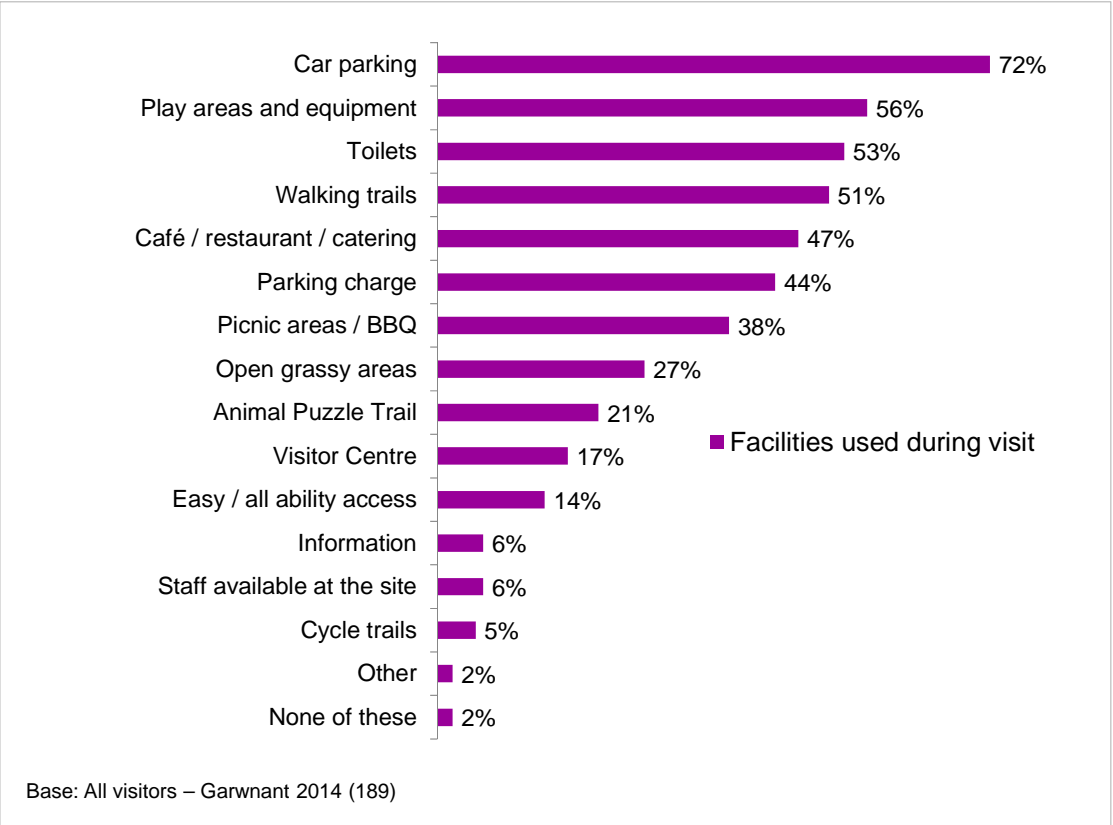
## 6.2 Facilities used

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

The facilities used reflected to a large extent visitors' views of the importance of facilities. Parking was used by the highest proportion of visitors (72%), followed by play area and equipment (56%), toilets (53%) and walking trails (51%).

A little under half had used the cafe (47%), 44% had 'used' the parking charge, and 38% had used the picnic or BBQ facilities. Two in five (21%) had used the Animal Puzzle Trails and 17% had been to the Visitor Centre.

**Figure 13: Q15a. Facilities used at Garwnant 2014**



On a slightly different note: just under a quarter of visitors had a dog with them (22%), and the majority of these (76%) said that they would use paths and trails that had been designed for dog walkers in mind, if they were available.

### 6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by 30 or more visitors to Garwnant have been detailed in Figure 14 overleaf. Ratings were mostly extremely positive, with very few visitors giving a poor rating, and the vast majority giving a positive rating of either 'excellent', 'very good' or 'good'. However, there were some areas which did not receive wholly positive ratings, which will be looked at in more detail below.

The facility that received the highest score was the toilet facilities: over half rated them as 'excellent' (52%) whilst most of the remainder rated them as 'very good' (36%) or good (10%). Just 1% said they were poor.

The open grassy areas, Animal Puzzle and walking trails also received very high scores with over four in ten giving an excellent rating to each (47%, 45%, 43% respectively) and most of the remainder saying they were very good or good.

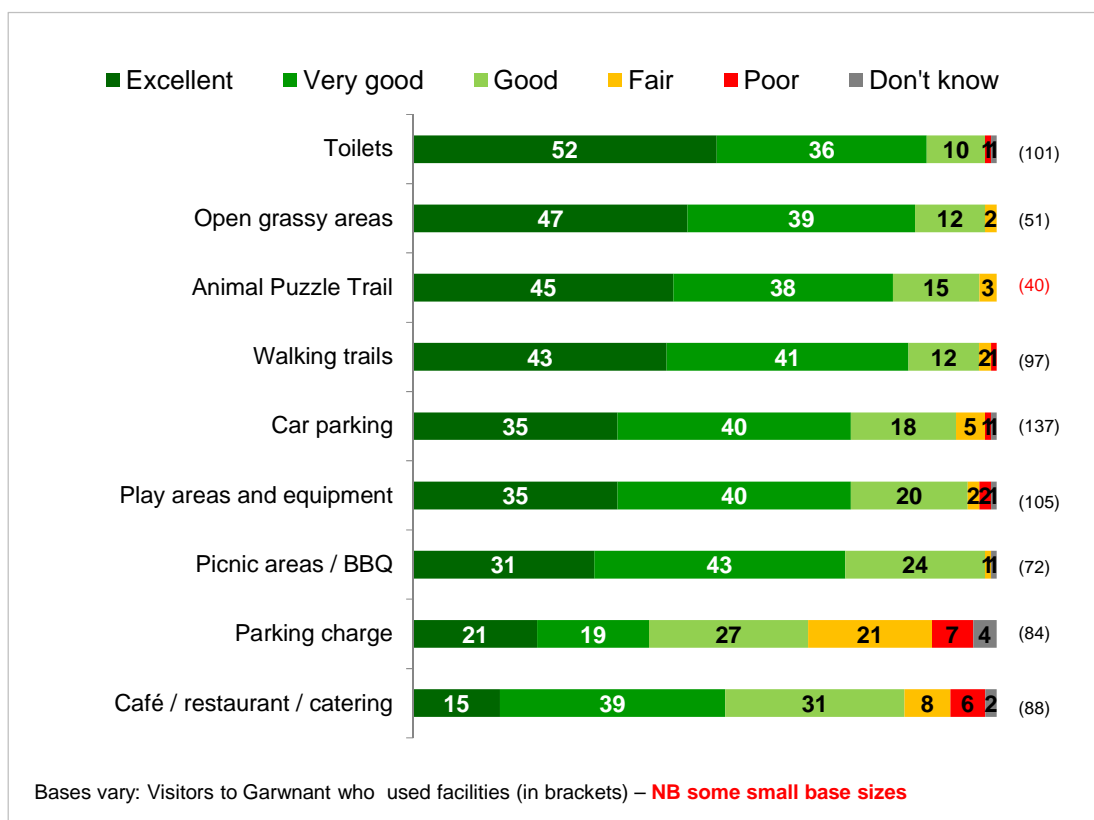
The play areas and equipment were rated as excellent by just over a third overall (35%) with 60% saying they were very good or good. The remainder was split between 2% saying the play facilities were fair and 2% saying they were poor. Visitors with children under 5 were the only ones to say the play area was poor (3%); those with 6-15 year olds all gave a positive rating. Visitors with older children were particularly likely to rate the play areas as excellent, with 46% of those with visiting with 11-15 year olds doing so.

Around a third also rated the car parking as excellent (35%) whilst 58% said it was very good or good, meaning 93% were positive overall. The 6% who were therefore not wholly positive about the parking was split between 5% saying it was fair and 1% saying it was poor (actually just one person). However, when looking specifically at the rating of the car parking *charge*, 7% rated this as poor and a further 21% gave a fair rating, meaning only 67% were positive about the car parking charges overall, with one of the lowest 'excellent' ratings of 21%.

The facility that received the least positive excellent rating was the café, which just 15% rated as excellent. However as 39% said the café was very good and a further 31% said it was good, overall, 85% were positive about this aspect of the site. Looking at the non-positive raters, 8% said the café was fair and 6% said it was poor. A poor rating was more likely to be given by older cafe users (10% of over 55s said it was poor, whereas no 16-34s said this), and adult-only visitors (12% said it the café was poor - NB small sample size).



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



Looking at how these rating compare to the previous survey, Table 12 overleaf compares the proportion giving ‘excellent’ ratings in 2014 and 2011.

For most of the facilities listed, the proportion who gave an ‘excellent’ rating increased since the previous research, with the most significant increases seen in the ratings of the open grassy areas, up 25 % points to 47%, the Animal Puzzle Trail, similarly, up 23 % points to 45%, and the staff available at the site, up 20 points to 42%.

The proportion rating the toilet facilities increased by 19 points to 53% in 2014, and similarly the all ability access to the site also increased by 19 points (to 38%).

Negative changes since 2011 were noted for the café (down 11 points to 15%), the play area (down 5 points to 35%) and the car parking, down 3 points to 35%). Only the change in the cafe rating might cause any concern at this point, the other two changes were marginal:

**Table 12: Q15b – Proportions rating facilities at Garwnant as ‘Excellent’ 2014 vs. 2011**

Facilities	Garwnant 2014 %	Garwnant 2011 %	% point change
Toilets	52	33	+19
Open grassy areas	47	22	+25
Animal Puzzle Trail	45	22	+23
Walking trails	43	32	+11
Staff available at the site	42	22	+20
Cycle trails	40	29	+11
Easy / all ability access	38	19	+19
Car parking	35	38	-3
Play areas and equipment	35	30	-5
Information	33	18	+15
Picnic areas / BBQ	31	23	+8
Café / restaurant / catering	15	26	-11

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

## 7. Sources of information used to plan visit

Visitors were asked where they found out about Garwnant 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 said they had ‘always known about the site or had been before’ (52%) and as would be expected, this was much higher amongst repeat visitors (72%) than first-time visitors (10%).

Over a quarter of visitors had heard about Garwnant through word of mouth (29%) with first-time visitors being more likely to have found out about the site this way (48%) than repeat visitors (20%).

Other sources of awareness included seeing a road sign (8%) or just passing / en route (7%) whilst 5% had seen a leaflet.

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

	Garwnant 2014 %	Garwnant 2011 %	All Wales 2014 %
Always known about it / been here before	52	58	51
Word of mouth	29	18	20
Road signs	8	6	5
Just passing / en route	7	11	13
Leaflet	5	3	4
Google / other search engine	5	0	5
Forestry Commission website	3	0	1
Tourist Information Centre / Tourist Board	2	2	2
Map	2	2	2
Other websites	2	1	2

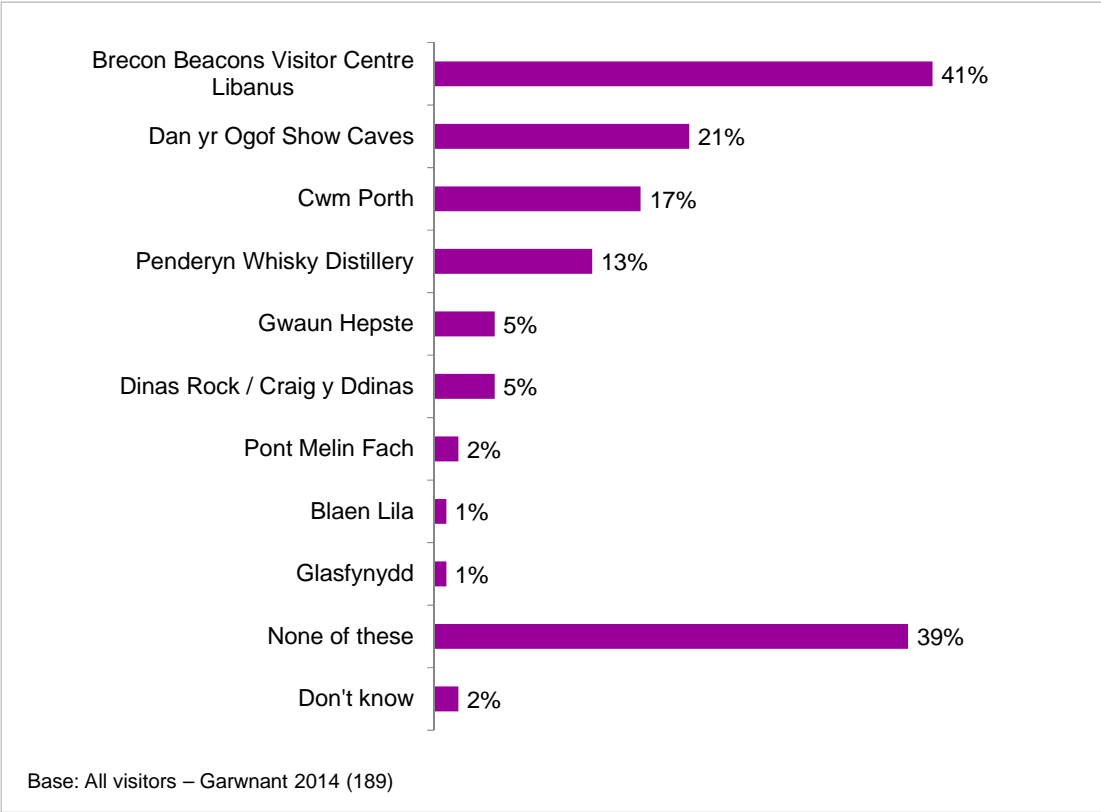
Base: All visitors – Garwnant 2014 (189); Garwnant 2011 (229); All Wales 2014 (1,154)

## 8. Visiting other areas and attractions

Visitors to Garwnant were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: most visitors (61%) had visited at least one.

The Brecon Beacons Visitor Centre was visited by the highest proportion of Garwnant visitors (41%), followed by Dan yr Ogof caves (21%), Cwym Porth (17%) and Penderyn Whisky Distillery (13%) – see Figure 15 below for full details.

**Figure 15: Q19. Other areas / attractions visited 2014**



## 9. Events at Garwnant

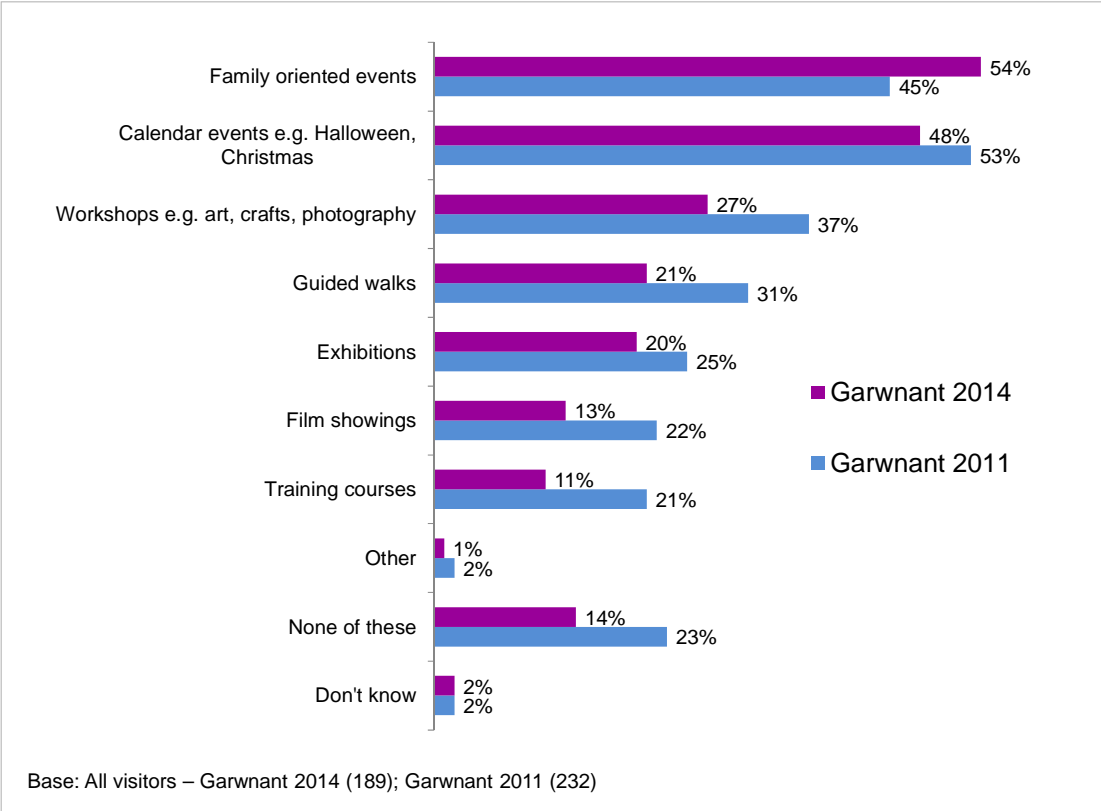
Visitors to Garwnant were asked which, out of a list of possible events, they would be interested in visiting at the site in the future at the site. The most popular type of event in 2014 was ‘family oriented events’ up from 45% in 2011 to 54%.

Calendar events like Halloween and Christmas events were also a popular choice with 48% expressing an interest in these (down slightly from 53% in 2011).

All the events asked about apart from family events received slightly lower interest scores than last time, with 27% saying they would be interested in attending a workshop (37% in 2011), 21% saying they would go on a guided walk (31% in 2011) and 20% being interested in an exhibition (25% in 2011).

Overall, 86% would be interested in at least some kind of event at Garwnant, which is an increase from 77% in 2011.


**Figure 16: Q20a. Events visitors would be interested in attending at Garwnant**



## Appendix I

### Questionnaire

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  2 Museum Place, Cardiff, CF10 3BG	<u><b>B01326-2</b></u>  <u><b>NRW / FCE</b></u>  <u><b>Quality of Visitor Experience – Year 2</b></u>  <u><b>FINAL</b></u>	<b>FOR OFFICE USE ONLY</b>		<b>INTERVIEWER RECORD WEATHER CONDITIONS (3-6m)</b>
		Case No.	Point (1-2)	<b>CAN MULTI-CODE</b> 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)
		<b>Q4a</b> Personally taken part in	<b>Q4b</b> Others in group taken part in	<b>Q4c</b> Personally / other <b>PLANNING</b> 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)
	<b>OTHERS</b>			
	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><b>Q7</b> How or where did you find out about this site as a place to visit? <b>CODE ALL MENTIONED</b></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><b>Q8</b> What do you like most about the site? <b>PROBE</b> Anything else? <b>DO NOT PROMPT – CODE ALL MENTIONED</b></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><b>Other (please specify)</b> ----- -----  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

# GARWNANT

## ASK ALL

### SHOWCARD G7

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

**CODE ALL MENTIONED**

		(105-108m)
A	Animal Puzzle Trail	1
B	Café / restaurant / catering	6
C	Car parking	7
D	Cycling trails	A
E	Easy / all ability access	C
F	Events	D
G	Information available / interpretation	M
		(109-112m)
H	Open grassy areas	2
I	Parking charge	4
J	Picnic areas / BBQ	5
K	Play areas and equipment	7
L	Staff available at the site	A
M	Toilets	B
N	Visitor Centre	E
O	Walking trails	F

**Other (please specify)**

-----  
-----

None of these  
Don't know

(113-116m)

M  
N

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

**PROBE** Anything else?

**RECORD VERBATIM**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(117-120m)

(121-124m)

Nothing  
Don't know

M  
N

# GARWNANT

## ASK ALL

### SHOWCARD G7 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 Animal Puzzle Trail	1	1	2	3	4	5	6	7	(140)
B Café / restaurant / catering	6	1	2	3	4	5	6	7	(145)
C Car parking	7	1	2	3	4	5	6	7	(146)
D Cycling trails	A	1	2	3	4	5	6	7	(149)
E Easy / all ability access	C	1	2	3	4	5	6	7	(151)
F Events	D	1	2	3	4	5	6	7	(152)
G Information available / interpretation	M	1	2	3	4	5	6	7	(160)
	(129-132m)								
H Open grassy areas	2	1	2	3	4	5	6	7	(164)
I Parking charge	4	1	2	3	4	5	6	7	(166)
J Picnic areas / BBQ	5	1	2	3	4	5	6	7	(167)
K Play areas and equipment	7	1	2	3	4	5	6	7	(169)
L Staff available at the site	A	1	2	3	4	5	6	7	(172)
M Toilets	B	1	2	3	4	5	6	7	(173)
N Visitor Centre	E	1	2	3	4	5	6	7	(176)
O Walking trails	F	1	2	3	4	5	6	7	(177)
<b>OTHERS (WRITE IN)</b>	(133-136m)								
		1	2	3	4	5	6	7	( )
		1	2	3	4	5	6	7	( )
		1	2	3	4	5	6	7	( )

None of these  
Don't know

M  
N

**ASK ALL**

**SHOWCARD H AGAIN**

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

(235)

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

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

Don't know / not sure

7

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

**SINGLE CODE**

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

(236)

**SHOWCARD I**

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

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND  
 IF NONE RECORD 0. IF DON'T KNOW, RECORD AAAA**

- Food and drink \_\_\_\_\_
- Activities available at this site \_\_\_\_\_
- Parking \_\_\_\_\_
- Souvenirs / gifts \_\_\_\_\_
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_
- Anything else \_\_\_\_\_

- (237-240)
- (241-244)
- (245-248)
- (249-252)
- (253-256)
- (257-260)

**SHOWCARD J**

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

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND  
 IF NONE RECORD 0. IF DON'T KNOW, RECORD AAAA**

- Food and drink \_\_\_\_\_
- Accommodation (if staying overnight) \_\_\_\_\_
- Admission to other attractions \_\_\_\_\_
- Parking \_\_\_\_\_
- Transport, including public transport, taxis and petrol \_\_\_\_\_
- Souvenirs / gifts \_\_\_\_\_
- Hiring equipment such as boats, bikes or horses \_\_\_\_\_
- Anything else \_\_\_\_\_

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



# GARWNANT

FOU: (335-369 FOR Q19)

## ASK ALL

### SHOWCARD K7a (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**

- Blaen Llia
- Brecon Beacons Visitor Centre Libanus
- Cwm Porth (Brecon Beacons National Park Waterfalls Car Park)
- Dan yr Ogor Showcaves
- Dinas Rock / Craig y Ddinas
- Glasfynydd
- Gwaun Hepste (Four Falls Trail)
- Penderyn Whisky Distillery
- Pont Melin Fach

- None of these
- Don't know

(365-368m)

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

FOU: (370-410 FOR Q20)

### SHOWCARD K7b (W)

**Q20a** Which of the following types of events would you be interested in attending here?

**PROBE** Any others?

**CODE ALL MENTIONED**

- Family oriented events
- Workshops such as art, crafts and photography
- Film showings
- Calendar events such as Halloween or Christmas events
- Training courses
- Exhibitions
- Guided walks

Other (please specify) \_\_\_\_\_

- None of these
- Don't know

(405-408m)

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

### Q20bi INTERVIEWER – CODE IF RESPONDENT HAS A DOG WITH THEM

Yes

No

(409)

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

**Q20bii** Would you use paths and trails that have been designed with dogs and dog walkers in mind e.g. paths and trails that included agility exercises or an off lead area?

- Yes
- No

Don't know

(410)

- 1
- 2
- 3

**ASK ALL**

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

**Q21 INTERVIEWER RECORD GENDER**

- Male
- Female

(415)  
1  
2

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

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

Refused

(416)  
1  
2  
3  
4  
5  
6  
7

**SHOWCARD M**

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

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

Refused

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

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

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

**Job title** \_\_\_\_\_

**Position / Grade** \_\_\_\_\_

- AB
- C1
- C2
- DE

Refused

(418)  
1  
2  
3  
4  
5

<b>Q25</b>	Do you have any children aged 15 or under living in your household?	(420)
	Yes	1
	No	2
	Refused	3
<b>Q26</b>	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? <b>INCLUDES PROBLEMS RELATED TO OLD AGE</b>	(421)
	Yes – limited a lot	1
	Yes – limited a little	2
	No	3
	Refused	4
<b>SHOWCARD N</b>		
<b>Q27</b>	Which of these best describes your ethnic origin? <b>SINGLE CODE</b>	(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:					
<b>THANK YOU FOR YOUR TIME - PROVIDE LEAFLET.</b>					
<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)
<b>B01326-2</b>	<b>F.O.U (BACK CHECKS)</b>		<b>Accompanied</b>	<b>Yes 1</b> <b>No 2</b>	<b>Supervisor signature</b>

## 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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