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Research Report

Quality of the
Visitor Experience:
Gwydyr 2013



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Forestry Commission England

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1. Executive summary

1.1 Quality of Visitor Experience Research

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted: 1,545 in England and 1,114 in Wales.

A total of 42 sites will be surveyed: 14 per year (7 in each country). All selected sites in England are high usage, while sites in Wales consist of a combination of medium and high usage sites. In 2013, interviews were conducted at 9 high usage sites (7 in England and 2 in Wales) and 5 medium usage sites (all in Wales).

This report summarises the findings from the 147 visitor interviews conducted at Gwydyr in 2013. Throughout the report, comparisons have been made to the previous research conducted in 2010, and the all Wales average (aggregated data from all 7 sites surveyed in 2013).

1.2 Gwydyr

Gwydyr Forest is located in the heart of the Snowdonia National Park. The forest is host to a mixture of diverse habitats and species, and is a key site to watch wildlife, featuring upland lakes, major rivers, upland oak woodlands, large conifers and a variety of open spaces.

Gwydyr Forest extends over 7,250 hectares, including 4,900 hectares of productive woodland. Visitors to Gwydyr are able to undertake a range of activities at the site and the forest has become familiar to thousands of visitors who walk the paths, study wildlife, cycle, climb, fish, orienteer, or merely enjoy the calm and tranquillity.

1.3 Perceptions of the site

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

Over two thirds (68%) rated the site as 'excellent', which is higher than the all Wales findings (62%) and significantly higher than the previous study conducted at Gwydyr in 2010 (25%). A further quarter rated the site as 'very good' (27%) and 5% rated it as good.

Similarly, ratings of how safe and welcoming the site was were also very positive: this was also the case across all Welsh sites. Nobody interviewed at Gwydyr gave a negative rating of the site in terms of it being safe and welcoming. Approaching two thirds of the visitors to Gwydyr gave this measure an 'excellent' rating (61%) with another 35% having rated it as 'very good'.

When asked whether they would be likely to recommend Gwydyr as a place to visit to a friend or relative (using a score of 0 to 10), scores for Gwydyr and all Wales sites generally were very positive. The average score for Gwydyr was 9.7 out of 10, higher than both the 2010 Gwydyr score of 8.9 and the all Wales score of 9.4.

1.4 Strengths of the site

Three favourite things about the Gwydyr site stood out. The most mentioned, (by four out of five) was 'scenery / views / beautiful' (80%). This is significantly higher than the all Wales figure of 57%.

'Peace / tranquillity / relaxation' at Gwydyr were mentioned by nearly half of respondents (49%), whilst a third (33%), mentioned 'walks / paths / trails' as favourite things.

1.5 Areas for improvement

The majority of visitors to Gwydyr could not think of anything that would add to their enjoyment of the site, and only made positive comments (62%). There were no prevailing aspects that needed attention.

There were however calls by small minorities for:

- Improved toilets / shower facilities (8%)
- Improved signage / maps (5%)
- Improved paths / cycle tracks (3%)
- More picnic facilities (3%)
- More dog poo bins (3%)
- More bins generally (2%)
- Fewer people / fewer cyclists (2%).

1.6 Visitor profile

The majority of visitors to Gwydyr had visited the site before (70%). This proportion was consistent with the all Wales average of 74% who said they had been to their respective forest sites before.

Only around a third of visitors to Gwydyr had travelled for less than three hours to get there (35%). This was considerably less than the all Wales average of 56%.

The gender profile of visitors to the site was in line with the all Wales visitor percentages, though there was a bias towards older people at Gwydyr (67% of visitors to Gwydyr were 45 years of age or older compared with 54% in the combined all Wales figures).

Gwydyr visitors tended towards the ABC1 socio-economic groups (professionals and middle managers - 79%) compared to all Wales (70%), and were more likely to be retired (Gwydyr 24% vs. all Wales 19%).

Probably due to the older age group bias, the Gwydyr visitors were less likely to have children in their household (20%) compared to all Wales (30%).

The overwhelming majority of visitors to Gwydyr were White British / Welsh / Irish (97%), with a small number of visitors (2%) describing their ethnicity as 'white other' (1%) and 'black / Asian / mixed' (1%).

2. Introduction

2.1 Background

The woodland estate managed by Natural Resources Wales (NRW) and Forestry Commission England (FCE) covers some 105,000 hectares and 256,000 hectares respectively.

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

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

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

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

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

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

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

2.2 Research programme

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forest and woodland sites across England and Wales. In 2013, a total of 2,659 interviews were conducted; 1,545 in England and 1,114 in Wales.

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

Table 1 below details the sites surveyed in 2013, along with the number of interviews completed at each.

Table 1: Interviewing sites and number of interviews conducted

England		Wales	
Site	No. of interviews	Site	No. of interviews
Alice Holt	241	Afan Forest Park (H)	192
Cannock Chase	223	Brechfa (M)	138
Cardinham Woods	237	Gwydyr (M)	147
Grizedale	211	Hafren (M)	130
Sherwood Pines	207	Moel Famau (M)	190
Wendover Woods	216	Newborough (H)	182
Westonbirt	210	Whitestone (M)	135
TOTAL	1,545	TOTAL	1,114

* H = High usage; M = Medium usage

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

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

At Gwydyr, interviewing took place between 3rd August and 13th October 2013, and a total of 147 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Gwydyr in 2013, 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 2010 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

3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who are visiting Gwydyr. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2013.

The gender profile of visitors to the site was in line with the all Wales visitor percentages, though there was a bias towards older people at Gwydyr - 67% of visitors to Gwydyr were 45 years of age or older compared with 54% in the combined all Wales figures.

Gwydyr visitors tended towards the ABC1 socio economic groups (79%) compared to all Wales (70%), and were more likely to be retired (Gwydyr 24% vs. all Wales 19%).

Probably due to the older age group bias, the Gwydyr visitors were less likely to have children in their household (20%) compared to all Wales (30%).

The overwhelming majority of visitors to Gwydyr were White British / Welsh / Irish (97%), with a small number of visitors (2%) describing their ethnicity as 'white other' (1%) and 'black / Asian / mixed' (1%).

Nearly three in ten visitors to Gwydyr spoke Welsh (28%): 14% fluently and 14% non-fluently. This was higher than the all Wales average of 20% Welsh speakers (8% fluent, 12% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2013

		Gwydyr %	All Wales %	
Gender	Male	56	59	
	Female	44	41	
Age	16 - 24	3	6	
	25 - 34	11	15	
	35 – 44	18	25	
	45 – 54	23	21	
	55 – 64	22	18	
	65+	22	15	
Social class	AB	45	40	
	C1	34	30	
	C2	16	19	
	DE	5	9	
	Refused	1	2	
Working status	Full-time employee (30+ hours per week)	59	60	
	Part-time employee (<30 hours per week)	6	8	
	Self-employed	4	6	
	Full-time education	1	2	
	Unemployed	-	1	
	Permanently sick / disabled	1	1	
	Retired	24	19	
	Looking after home	1	2	
	Other	2	<1	
	Refused	1	1	
	Limiting illness	Yes – limited a lot	1	2
		Yes – limited a little	3	3
No		95	94	
Refused		1	2	
Children in household	Yes	20	30	
	No	79	69	
	Refused	1	1	
Ethnicity	White – British / Welsh / Irish	97	96	
	White – Other	1	2	
	Black / Asian / Mixed	1	1	
	Refused	1	1	
Welsh speaker	Yes	28	20	
	No	72	80	

Base: All visitors – Gwydyr (147); All Wales (1,114)

3.2 Group profile

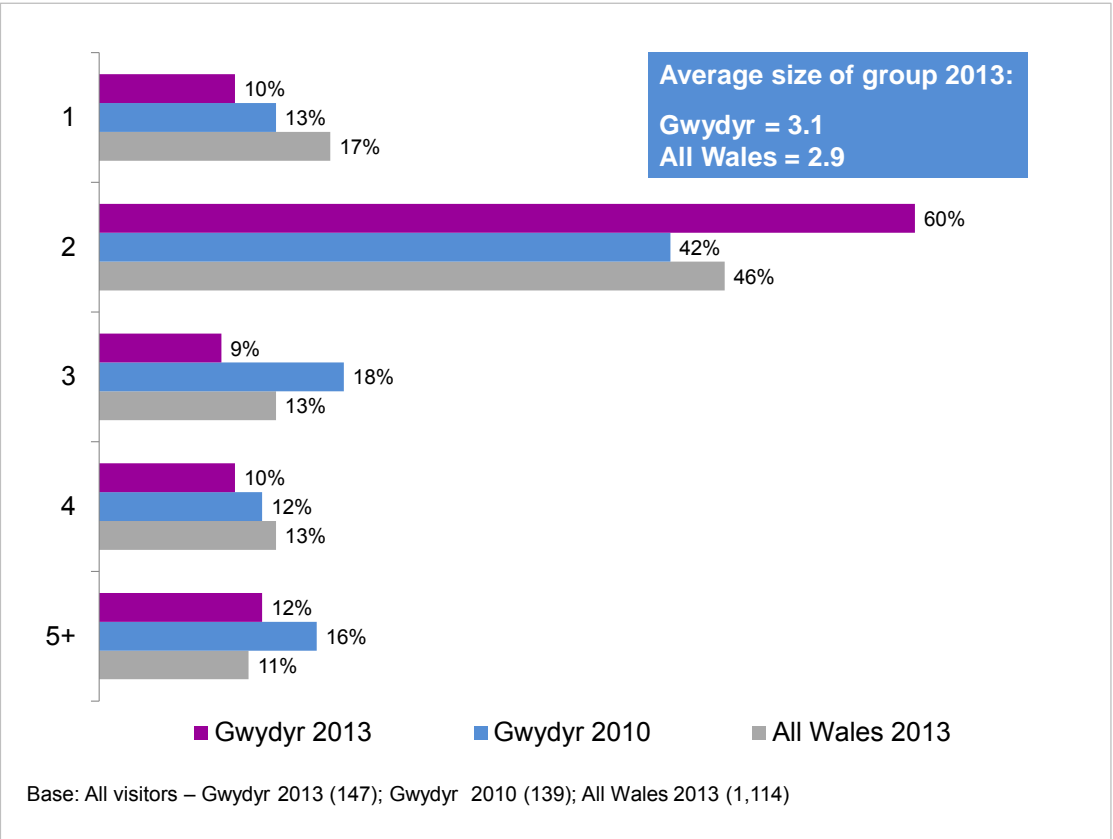
3.2.1 Size of group

Group sizes were slightly larger at Gwydyr (averaging 3.1 people) compared to the all Wales sample (which averaged 2.9 people).

The largest group by some margin, accounting for nearly two thirds of Gwydyr visitors (60%), consisted of two people. This was both higher than the previous Gwydyr research in 2010 (42%) and the all Wales average (46%).

The other groups accounted for around one on ten visitors: those who visited alone accounted for 10% of visitors, groups of three 9%, groups of four 10% and groups of five or more 12% – see Figure 1 below.

Figure 1: Q1. Total size of the group

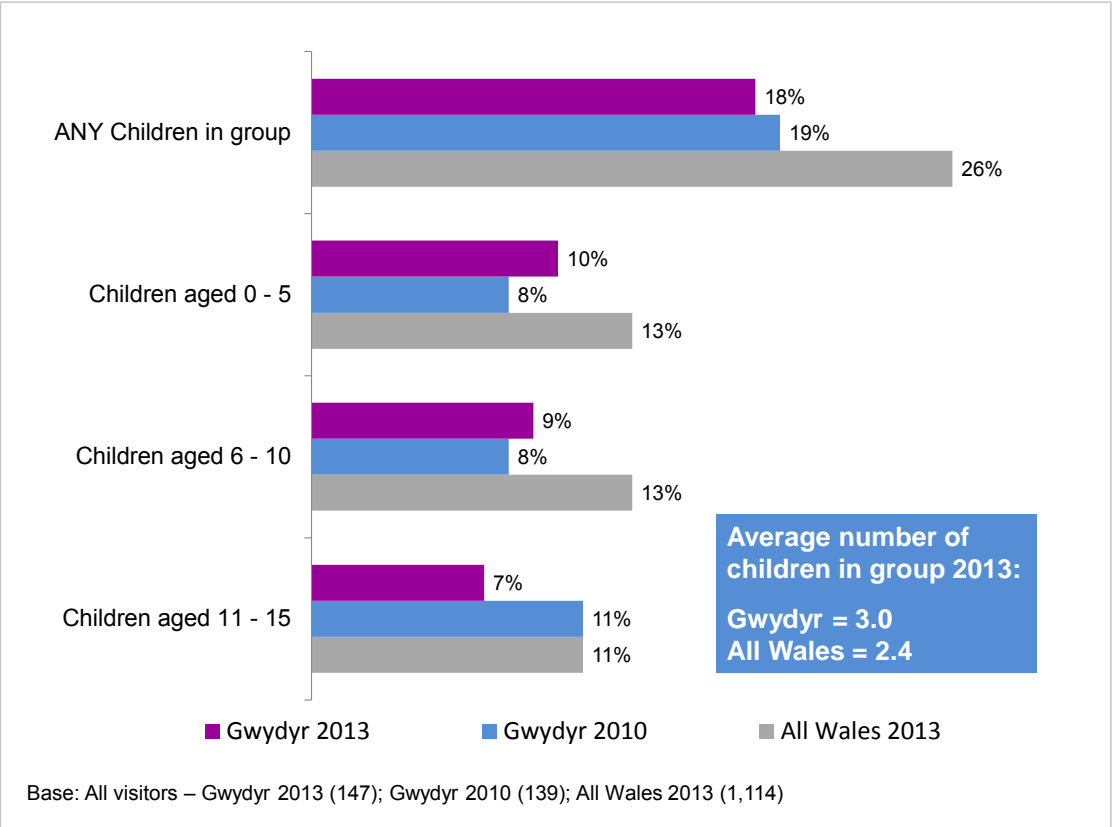


3.2.2 Composition of group

Less than a fifth of visitors to Gwydyr were accompanied by children (18%). This was lower than for all Wales (26%) but in line with the 2010 Gwydyr study (19%). The average number of children in the Gwydyr groups was, however, higher than the all Wales figure (a mean of 3.0 children per group at Gwydyr compared with 2.4 overall).

The percentage of groups with children was consistently lower than the all Wales averages across the various age ranges – see Figure 2 below.

Figure 2: Q1. Composition of group



4. Profile of visit

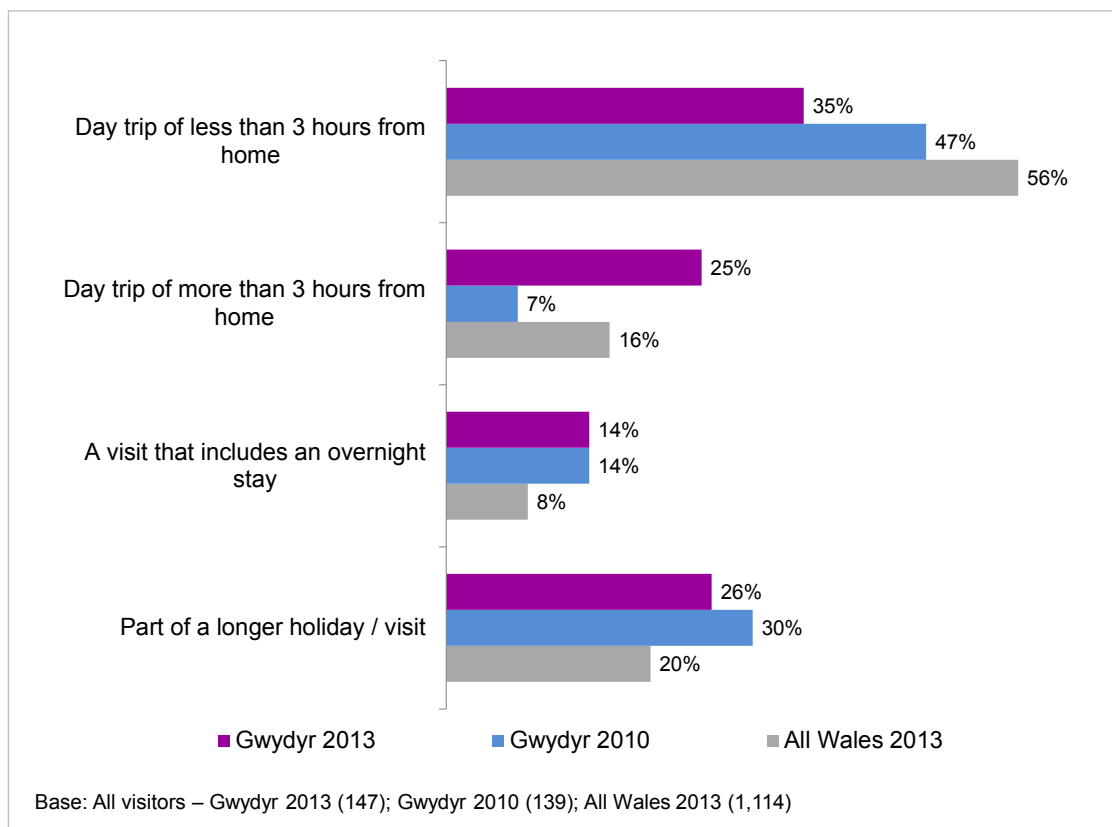
4.1 Type of visit

Only around a third of visitors to Gwydyr travelled for less than three hours to get to Gwydyr (35%). This was considerably less than the all Wales average (56%).

A quarter of visitors had travelled more than three hours from home on a day trip to Gwydyr. Day trips overall accounted for 60% of the visits to Gwydyr, compared with an all Wales average of 72%.

Four out of ten visitors to Gwydyr (40%) were staying in the vicinity of Gwydyr overnight or as part of a longer holiday, compared with an all Wales average of 28% – 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.

Nearly two thirds of visitors to Gwydyr came from North Wales (61%), with only 1% travelling from elsewhere in Wales. The 37% who had travelled from outside Wales was in line with the all Wales figure of 43% - Table 3 below and Figure 4 overleaf provide more details.

Table 3: Visitor origin 2013

		Gwydyr	All Wales
		%	%
Home region	North Wales	61	23
	Mid / West Wales	1	14
	South West Wales	-	11
	Valleys	-	2
	South East Wales	-	7
	Outside of Wales	37	43
Home nation	Wales	63	57
	England	35	40
	Rest of UK	1	<1
	Abroad	2	1
	Refused	-	2

Base: All visitors – Gwydyr (147); All Wales (1,114)

Figure 4: Map of visitor origin for Gwydyr



4.3 Frequency of visits

4.3.1 First-time visitors

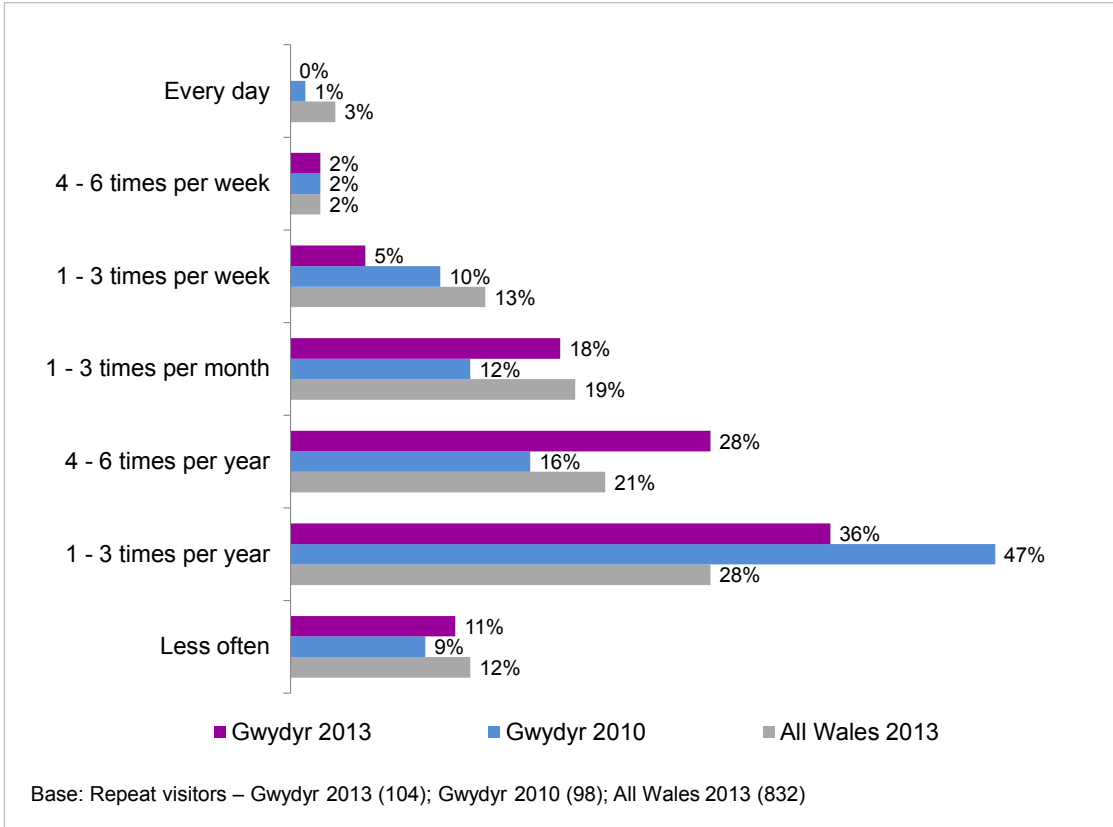
In 2013 only 29% of visitors to Gwydyr were first time visitors. This was consistent with the all Wales average of 25% who said they had never visited their respective forest sites before.

4.3.2 Repeat visitors

Focussing on repeat visitors (70% of the sample), it can be seen that three quarters of visitors went to Gwydyr 4 to 6 times a year or less often (75%), compared with the all Wales average (61%).

Those visiting 1 to 3 times a week had the largest negative gap when compared with the all Wales averages. Only 5% visited Gwydyr in that time frame against an all Wales average of 13% - see Figure 5 below.

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

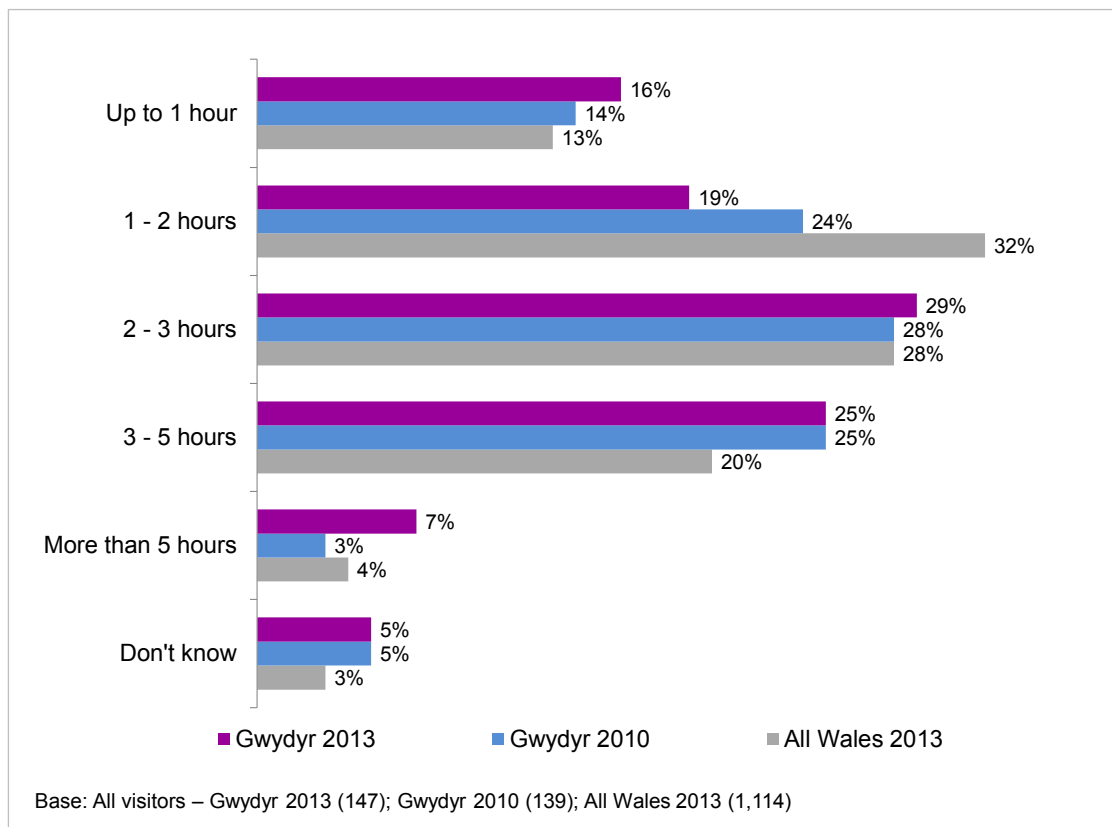


4.4 Length of visit

Compared to previous years, visitors to Gwydyr in 2013 were staying longer at the site. In 2010 the average length of visit was 2 hours and 27 minutes, whilst in 2013 it was 2 hours and 38 minutes. The average length of visit across all Wales was 2 hours and 15 minutes.

The changing lengths of time visitors spent at the site can be seen below, with the most marked increase in time at the site occurring in those spending more than 5 hours at Gwydyr (up from 3% in 2010 to 7% in 2013) – see Figure 6 below.

Figure 6: Q6. 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.

By far the most popular activity at Gwydyr was walking generally (92%). Walking along sign-posted trails was the most popular (63%). The proportion who took part in walking activities had increased since 2010 (70%), and was higher than the all Wales average (73%).

Other activities at Gwydyr in 2013 included admiring the views (29%), picnic or barbeque (16%) and photography (16%).

The percentage of visitors cycling had dropped considerably since the 2010 study - Gwydyr 2013 (5%) vs. Gwydyr 2010 (32%) – see Table 4 overleaf.

Table 4: Q4a/Q4b/Q5 - Activities taken / intend to take by all members of visitor group

	Gwydyr 2013 %	Gwydyr 2010 %	All Wales 2013 %
Cycling on forest roads, tracks or trails	5	9	19
Cycling / mountain biking off trails or tracks	1	29	8
TOTAL CYCLING	5	32	22
Walking on a sign-posted trail	63	54	48
Walking but not following sign-posts	34	14	22
Dog walking	27	20	30
TOTAL WALKING	92	70	73
Admiring the views	29	-	22
Picnic or barbeque	16	12	15
Photography	16	2	8
Bird watching	9	4	4
Using the café / restaurant / other catering	8	9	7
Nature / natural history visit	6	1	3
Seeing something in the forest	3	-	3
Educational visit	2	-	1
Running / jogging	1	1	3
Organised trip / event	1	3	1
Orienteering	1	2	<1

Base: All visitors – Gwydyr 2013 (147); Gwydyr 2010 (139); All Wales 2013 (1,114)

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

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. Time spent on activities has been analysed in Table 5 below. Cycling activities have not been commented on due to a very small base (5 individuals).

Overall, visits to Gwydyr lasted 2 hours and 38 minutes on average. Those walking averaged 2 hours and 31 minutes (a 12 minute increase on the Gwydyr 2010 average) – see Table 5 below.

Table 5: Q7 – Time spent taking part in cycling and walking at Gwydyr (Actual respondents only)

	Total duration of visit		Time spent on any walking	
	2013	2010	2013	2010
Up to 30 minutes	4	-	3	1
31 – 60 minutes	11	14	11	15
1 – 2 hours	19	24	27	26
2 – 3 hours	29	28	33	30
3 – 5 hours	25	25	21	24
5+ hours	7	3	7	-
AVERAGE	2 hrs 38 mins	2 hrs 27 mins	2hrs 31 mins	2hrs 19 mins

Base: all visitors (147); respondents who walked (135)

4.7 Money spent in the area as a result of the visit

Visitors to Gwydyr were 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 Table 6 show the figures calculated by combining the data across all types of spending, and across both lone visitors and visitor groups. Please note that mean scores include 'zero' responses, and that the data on money spent in Gwydyr in 2010 was not available.

Nearly six out of ten of the visitors to Gwydyr claimed that they would spend up to £5 in the area as result of their trip (58%), with a further one in five planning to spend £6 - £10 (19%).

Of the remaining 23%, 10% said they would spend £11 - £20, 5% - £21 - £50 and 8% £51 or more.

The average spend in the area as a result of visiting Gwydyr was £13.50, almost twice the all Wales average of £7.23 – see Table 6 below.

Table 6: Q18a/Q18b – Average spend per person/group – frequency of spending within each price range

	Gwydyr 2013	All Wales 2013
	%	%
£0 - £5	58	75
£6 - £10	19	12
£11 - £20	10	6
£21 - £50	5	3
£51+	8	3
AVERAGE	£13.50	£7.23

Base: All visitors – Gwydyr 2013 (147); All Wales 2013 (1,114)

When looking at individual types of spending, the item that the highest proportion of visitors to Gwydyr were likely to spend anything on was food and drink, with almost half (46%) planning to spend on these items. The Gwydyr average planned spend on food and drink was significantly higher at £13.77 than that for all Wales £9.22.

Another major area of spend was transport, with around four out of ten (41%) of the visitors to Gwydyr planning to spend on it.

Nearly a fifth said they'd be spending on accommodation (19%), with an average spend higher than that of all Wales (Gwydyr £20.20 vs. all Wales £15.65) – see Table 7 below.

Table 7: Q18a/Q18b – Average spend across individual items (includes zero spend)

	Proportion of visitors to <u>Gwydyr</u> spending anything on this item %	Average £ Gwydyr 2013	Average £ All Wales 2013
Food and drink purchased outside any accommodation	46	13.77	9.22
Transport including petrol, taxis, public transport	41	7.06	6.83
Accommodation, including food and drink purchased there	19	20.20	15.65
Non-routine shopping	4	1.49	0.95
Other miscellaneous items	4	4.81	0.90
Admissions fees to attractions	3	0.11	0.43
Parking	1	0.02	0.64
Hiring equipment e.g. boats, bikes or horses	-	-	0.27

Base: All visitors – Gwydyr 2013 (147); All Wales 2013 (1,114)

5. Perceptions of the site

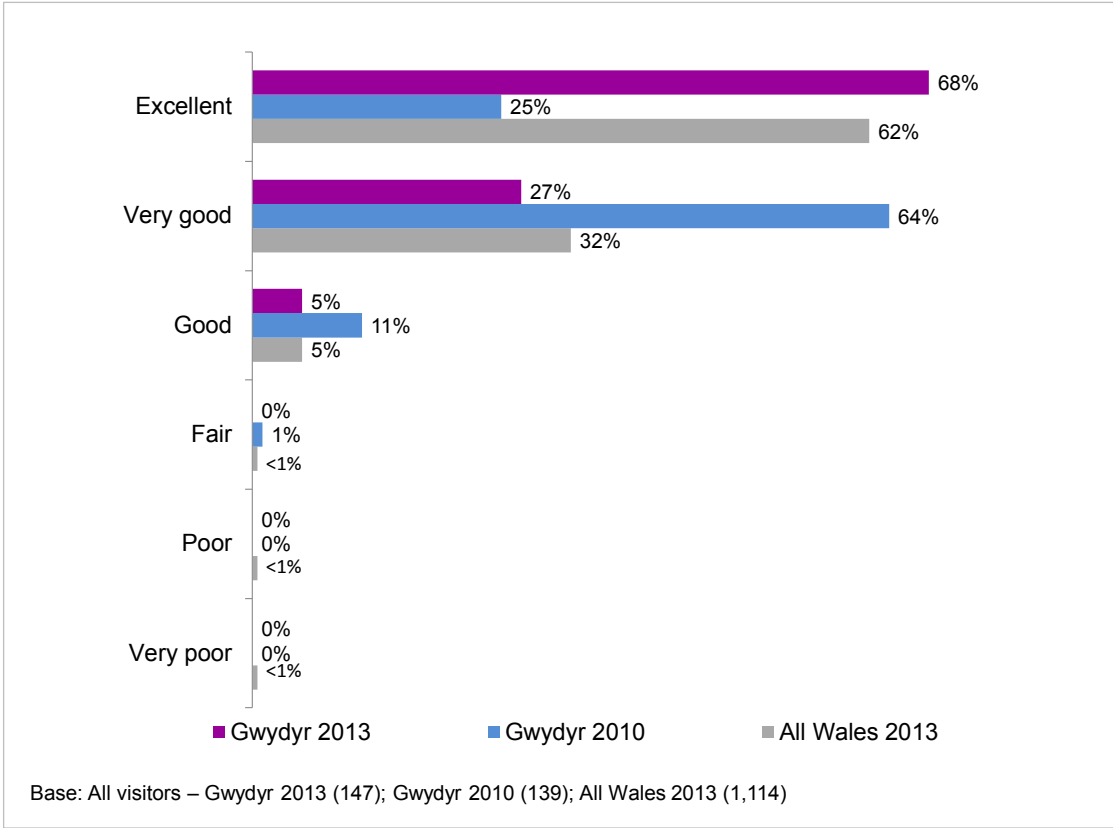
5.1 Overall rating of the site as a place to visit

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

Over two thirds (68%) rated the site as 'excellent', which is higher than the all Wales finding (62%) and significantly higher than the previous study conducted at Gwydyr in 2010 (25%).

A significant proportion of the 'very goods' from the 2010 Gwydyr study had been upgraded from 'very good' to 'excellent' – see Figure 7 below.

Figure 7: Q16. Rating of the site as a place to visit



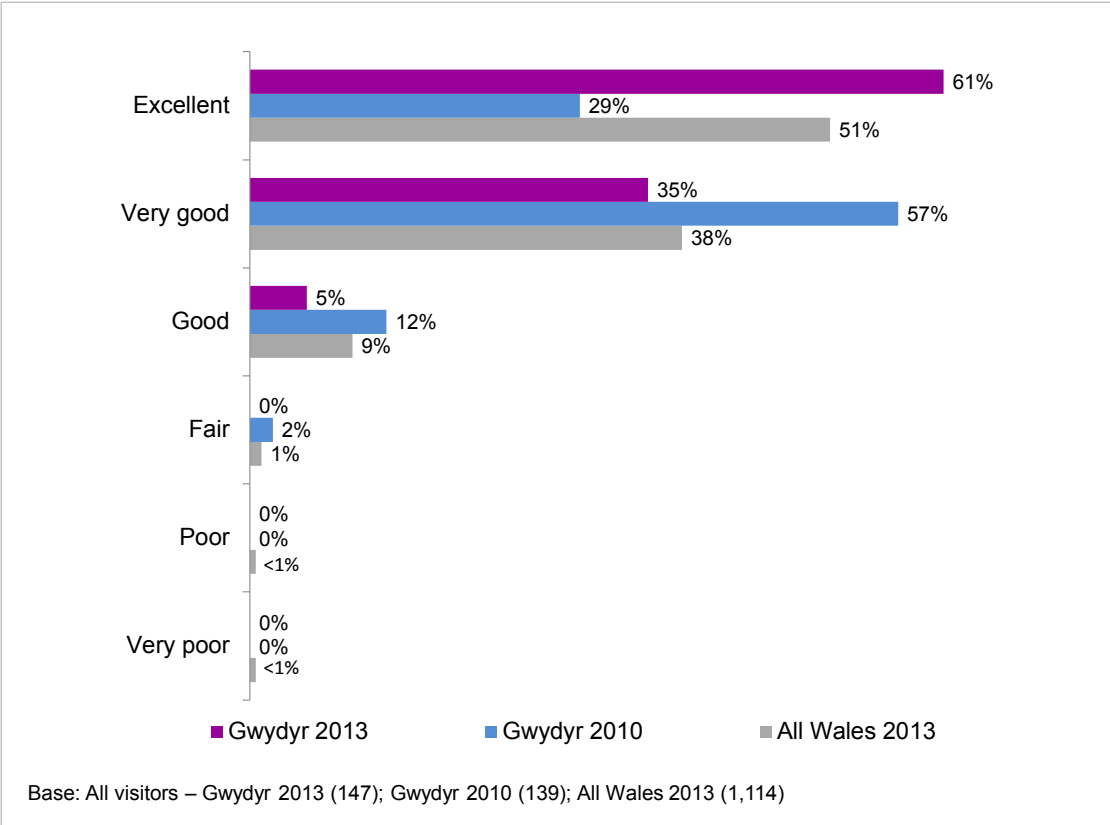
5.2 Overall rating of the site as safe and welcoming

Similarly, ratings of how safe and welcoming the site was were also very positive. This was also the case across all Welsh sites, and was found in the previous study in 2010. Nobody interviewed at Gwydyr gave a negative rating of the site in terms of it being safe and welcoming.

Three out of five visitors gave this measure an ‘excellent’ rating (61%), compared to 29% in 2010 and 51% across all Welsh sites.

Once again, a significant proportion of the ‘very goods’ from the 2010 Gwydyr study had been upgraded from ‘very good’ to ‘excellent’ – see Figure 8 below.

Figure 8: Q12. 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 8 overleaf details the comments provided by 2% or more of the sample, and shows the responses received from those visitors giving a positive rating (excellent, very good, good) for both Gwydyr and all Wales sites. In the case of Gwydyr this was **all** visitors.

The scenery / views / beautiful environment at Gwydyr was the top reason, mentioned by 18%. This was closely followed by Gwydyr having a good provision of trails and tracks (17%) and being a safe environment generally for all people (16%).

Other reasons included having good car parking (12%), being peaceful / pleasant / tranquil / relaxing (10%) and being well signposted and having good maps and information boards (10%) – see Table 8 overleaf for more details on the comments provided.

Table 8: Q13 – Reasons for giving a positive rating on how safe and welcoming the site feels – main mentions

	Gwydyr 2013 %	All Wales 2013 %
The scenery / views / beautiful environment	18	14
Good provision of paths / trails and tracks	17	13
Safe environment generally for all people	16	18
Good car parking	12	8
Peaceful / pleasant / tranquil / relaxing	10	11
Well signposted / good maps / info boards	10	9
Clean / tidy / well maintained	7	6
Good quality facilities	7	6
General positive comments	7	14
Live locally / convenient / easy to get to	5	4
People are friendly / no yobs	3	3
Well laid out / well organised	3	4
Been before / familiar with it	3	3
Never had any problems	3	4
Good toilets / plenty of toilets	3	2
Not too crowded / not too busy	3	1
Good place for the kids to play / safe for kids	2	5

Base: Visitors rating the site as excellent, very good or good – Gwydyr 2013 (147); All Wales 2013 (1,085)

5.3 Recommending the site as a place to visit

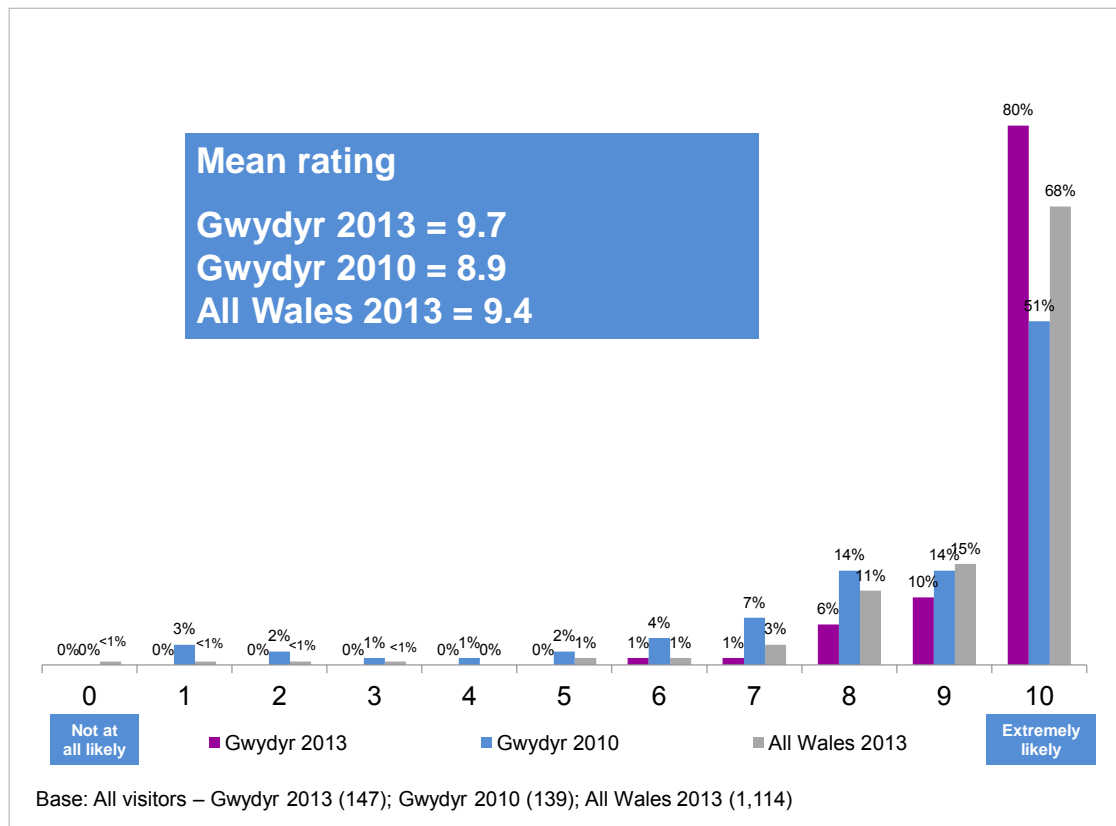
Visitors were asked whether they would be likely to recommend Gwydyr as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Gwydyr and all Wales sites in general were very positive. Only 2% gave a rating of less than 8/10.

Four fifths (80%) gave a rating of 10, which was higher than both the previous Gwydyr study in 2010 (51%) and the all Wales score (68%).

This was reflected in the mean scores, with Gwydyr 2013 standing at 9.7, compared with Gwydyr 2010 at 8.9 and all Wales at 9.4 – see Figure 9 below.

Figure 9: 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 Gwydyr is 79, which is considerably higher (by 29 points) than the score of 50 seen in 2010, and equal to the all Wales score of 79.

5.4 Favourite things about the site

Visitors to Gwydyr 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 9 below (compared to the previous research and the all Wales average).

Three favourite things about the Gwydyr site stood out: the most mentioned, by four out of five, was 'scenery / views / beautiful' (80%), compared with an all Wales figure of 57%.

'Peace / tranquillity / relaxation' at Gwydyr were mentioned by nearly half of respondents (49%), whilst a third (33%), mentioned 'walks / paths / trails' as favourite things – see Table 9 overleaf for more details of the aspects of the site most liked by visitors.

Table 9: Q9 – Favourite things about the site

Activities	Gwydyr 2013 %	Gwydyr 2010 %	All Wales 2013 %
Scenery / views / beautiful	80	69	57
Peace / tranquillity / relaxation	49	64	51
Walks / paths / trails	33	57	38
Good on-site facilities	10	4	9
Wildlife / bird watching	7	16	7
Plenty / cheap / good parking	7	5	5
Exercise / keeping fit	6	39	15
Activities for the children	5	6	6
Close to home / convenient	5	8	15
Like forests / trees / variety of trees	4	7	14
Fresh air / being outside	4	45	16
Cycle trails / opportunity to cycle	3	16	17
Opportunity to spend time with family / friends	3	8	5
Safe environment	3	9	8
Been before / wanted to come again	3	7	7
Café / restaurant	3	-	1
Well signposted / good maps / info	3	1	1
Good accessibility	2	-	1
Clean / well looked after	2	8	9

Base: All visitors – Gwydyr 2013 (147); Gwydyr 2010 (139); All Wales 2013 (1,114)

Adults without children in their group mentioned ‘peace / tranquillity / relaxation’ as a favourite thing more frequently (54%) than those with children in their group (27%).

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.

Turning firstly to what would enhance their enjoyment of the site. The majority could not think of anything that would add to their enjoyment, and only made positive comments (62%); this was significantly higher than the all Wales average of 47%.

Just under one in ten wanted an improvement in toilet / shower facilities (8%), and around one in twenty wanted improved signage / maps (5%).

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 10 below outlines the comments that were made by 2% of the sample or more.

Table 10: Q10 – What would enhance enjoyment of site – main mentions

	Gwydyr 2013 %	All Wales 2013 %
Nothing / general positive comments	62	47
Improve toilets / more toilets / shower facilities	8	8
Improve signage / better signs / maps	5	7
Better weather / more sunshine	5	2
Improve maintenance of paths / cycle tracks / better surfacing	3	3
More picnic areas / BBQ / picnic tables	3	2
More dog poo bins	3	5
More bins / litter bins / recycling bins	2	5
Fewer people / fewer cyclists	2	1

Base: All visitors – Gwydyr 2013 (147); All Wales 2013 (1,114)

When asked if there was anything that interfered with their enjoyment of the site, nearly four out of five reported that nothing had interfered with their enjoyment (76%) - this was around the same level as the all Wales average (79%).

The comments made were mentioned by quite small proportions, and Table 11 details those made by 2% or more.

Toilets (being either too few, closed or out of order) were mentioned by 4%, and improvements to signs by 3%.

Those aspects mentioned by 2% of visitors were issues around dog mess, litter bins and problems getting around Gwydyr – see Table 11 below for more details.

Table 11: Q11 – What interfered with enjoyment of site – main mentions

	Gwydyr 2013 %	All Wales 2013 %
Nothing	76	79
Wet / windy / raining	5	2
Toilets – not enough / closed / out of order	4	2
Signs unclear / need better signs	3	3
Dog mess on paths / in play areas	2	2
Lack of litter bins / needs more bins	2	2
Problems getting around the site (e.g. paths closed, no disabled access)	2	2

Base: All visitors – Gwydyr 2013 (147); All Wales 2013 (1,114)

6. Site facilities

6.1 Importance of site facilities

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

A choice of paths for walking were mentioned by the highest proportion of visitors to Gwydyr (61%) reflecting the importance of walking as an activity undertaken. This figure was higher than the proportion saying this in the previous research and the all Wales average (46% for each).

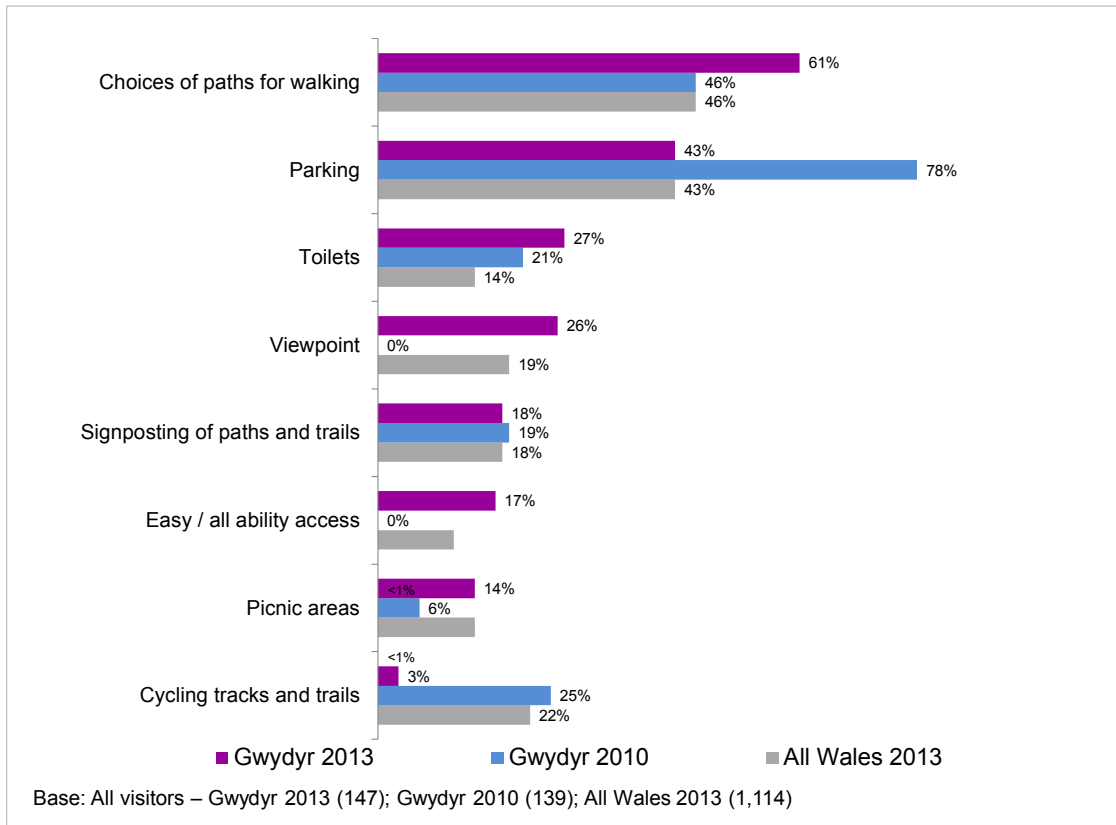
Parking was important to over four in ten of the visitors (43%), equal to the all Wales average of 43%, although significantly less than the last Gwydyr study in 2010 when it was 78%.

Toilets were important to over a quarter of visitors to Gwydyr (27%), as was having a Viewpoint (26%).

Around a fifth of visitors to Gwydyr felt that the signposting of paths and trails was important (18%), as was having easy / all ability access (14%).

Picnic areas were important to 14% of visitors, whilst cycling tracks and trails were of importance to only 3% - see Figure 10 overleaf for more details.

Figure 10: Q14. Importance of different facilities in deciding to visit the site



6.2 Facilities used

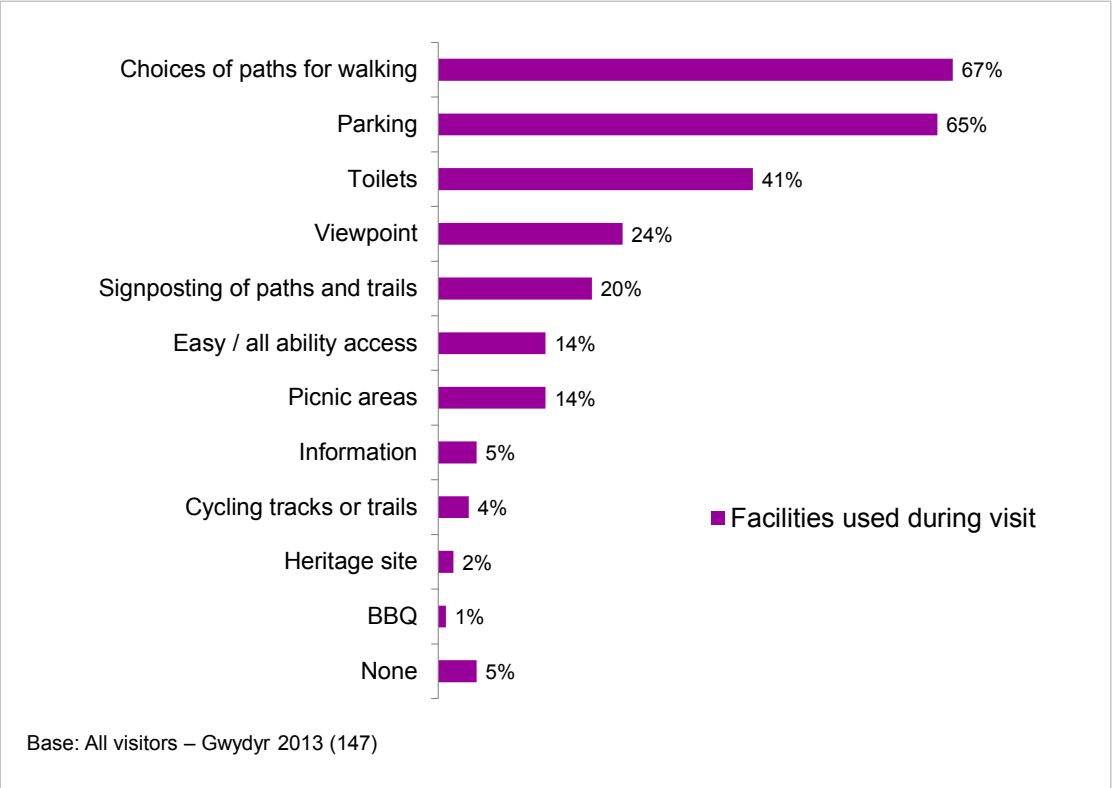
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The facilities used reflect, to a large extent, visitors' views of the importance of facilities. Choices of paths for walking were used by the highest proportion of visitors (67%), closely followed by parking (65%).

Toilets were used by around four out of ten visitors to Gwydyr (41%), and around a quarter took advantage of the Viewpoint (24%).

A fifth of visitors used the walking related signposts (20%) and 14% used the easy / all ability access facilities and picnic areas (14%) – see Figure 11 below.

Figure 11: Q15a. Facilities used at Gwydyr 2013



6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by more than 10% of the overall sample at Gwydyr have been detailed in Figure 12 below.

Ratings of most of the facilities used were positive, with very few of the visitors giving any of the facilities a poor rating, and the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’.

The facility that received the highest scores was the Viewpoint: 89% rated this as ‘excellent’ whilst the remainder said it was ‘very good’ (11%).

Over half of those who used the parking and those parts of Gwydyr with easy / all ability access rated them as ‘excellent’ (59% and 57% respectively), with another quarter rating them as ‘very good’ (24% for each).

The facilities that received the least positive ratings were the toilets (30% saying ‘excellent’) and the picnic areas (10% saying ‘excellent’). Saying that, most visitors who used them were positive about them to a certain extent – see Figure 12 below for more details of the ratings given for each facility.

Figure 12: Q15b. Rating of Gwydyr site facilities (where used) 2013

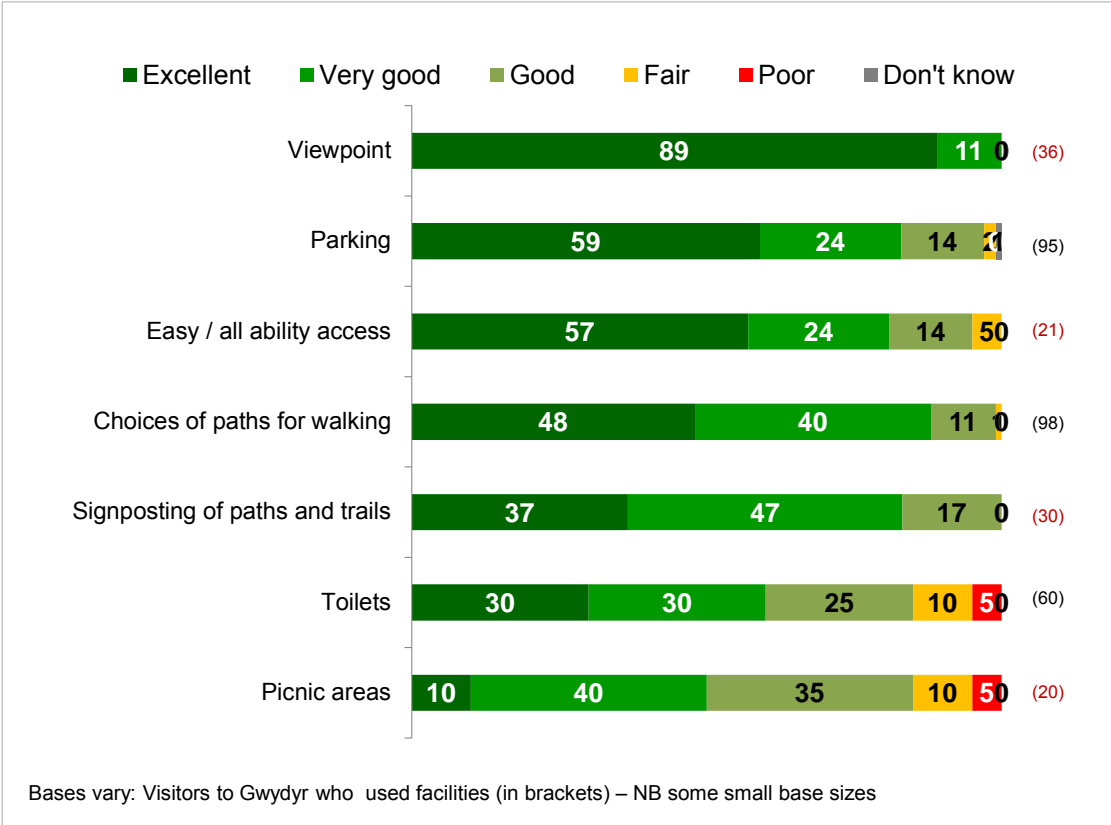


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2013 compared to 2010.

For virtually all the facilities listed, the proportion who gave an 'excellent' rating increased since the previous research, with the most significant increases seen in the proportions rating the easy / all ability access, choices of paths for walking and parking as 'excellent' (57%, 36% and 29% increases respectively) – see Table 12 below for more details.

Table 12: Q15b – Proportions rating facilities at Gwydyr as 'Excellent' 2013 vs. 2010

Facilities	Gwydyr 2013 %	Gwydyr 2010 %	% change
Viewpoint	89	-	-
Parking	59	30	+29
Easy / all ability access	57	0	+57
Choices of paths for walking	48	12	+36
Signposting of paths and trails	37	13	+24
Toilets	30	6	+24
Picnic areas	10	14	-4

Bases vary: visitors using each facility

7. Sources of information used to plan visit

Visitors were asked where they found out about Gwydyr 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.

Amongst first time visitors to Gwydyr, most heard about the site via word of mouth (40%), and this was by far the most frequently mentioned source of information for this group. Using a book / guide book was mentioned by one in five of the first time visitors to Gwydyr (19%).

Amongst repeat visitors to Gwydyr, the vast majority (84%) said that they had always known about it / been there before – see Table 13 below for more details.

Table 13: Q8 – How found out about the site as a place to visit

	First Time Visitors			Repeat Visitors		
	Gwydyr 2013 %	Gwydyr 2010 %	All Wales 2013 %	Gwydyr 2013 %	Gwydyr 2010 %	All Wales 2013 %
Word of mouth	40	44	39	13	24	19
Book / guide book	19	-	5	7	-	1
Google / internet	16	5	13	2	9	2
Just passing / en route	12	17	11	-	1	3
Map	9	2	6	3	1	2
Library	2	-	1	-	-	-
Tourist Board	5	2	2	2	1	<1
Always known about it / been here before	2	-	13	84	52	75
Accommodation provider	2	-	2	-	-	<1

Bases vary: First time vs. repeat visitors

8. Visiting other areas and attractions

8.1 Visiting other attractions and towns

Visitors to Gwydyr 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 (91%) had visited at least one.

The most visited attraction / area Betws y Coed town (82%). The next most popular were Llanwrst Town (57%) and Capel Curig (54%) – see Table 14 below for more details.

Table 14: Other attractions or areas visited in the last 12 months

Attractions / Areas	Gwydyr 2013 %	Gwydyr 2010 %
Betws y Coed Town	82	76
Llanwrst Town	57	46
Capel Curig	54	42
Llyn Geirionydd	43	22
Swallow Falls	40	61
Fairly Glen	23	24
Ty'n Lywyd	19	14
Gwydyr Castle	18	32
Gwydyr Uchaf	14	15
Hafna	14	23
Llyn Sarnau	14	21
None	9	4

Base: All visitors – Gwydyr 2013 (147); Gwydyr 2010 (139)

8.2 Visiting walks and trails

Visitors to Gwydyr were presented with a list of walks and trails and asked which of these way-marked trails they had used in the last 12 months.

The most popular was the Crafnant Circuit, used by nearly two thirds of visitors to Gwydyr (65%). This figure is considerably higher than the 2010 equivalent (36%).

Other walks and trails that more than one in five had visited were Geirionydd to Crafnant (30%), Crafnant View (29%), Swallow Falls (24%) and Llyn Elsi (22%) – see Table 15 below for more details.

Table 15: Walks or trails visited in the last 12 months

Walks / trails	Gwydyr 2013 %	Gwydyr 2010 %
Crafnant Circuit	65	36
Geirionydd to Crafnant	30	19
Crafnant View	29	19
Swallow Falls	24	31
Llyn Elsi	22	22
Llyn Parc	18	12
Hafna Miners Trail	16	19
Conwy Valley View	16	16
Pen yr Allt	12	8
Llyn Glan Gors	12	11
Lady Mary's Walk	9	6
Clogwyn Gigfran	7	21
Cyrau	6	6
Craig Forris	5	3
None	14	21

Base: All visitors – Gwydyr 2013 (147); Gwydyr 2010 (139)

8.3 Perceptions of walks and trails

Visitors to Gwydyr were asked to rate the walks and trails they had used.

Ratings of all the walks and trails used were very positive, with none of the visitors giving them a 'poor' rating and the majority giving a highly positive rating of either 'excellent' or 'very good' – see Figure 13 below.

Figure 13: Q20b. Rating of walks and trails (where used) 2013

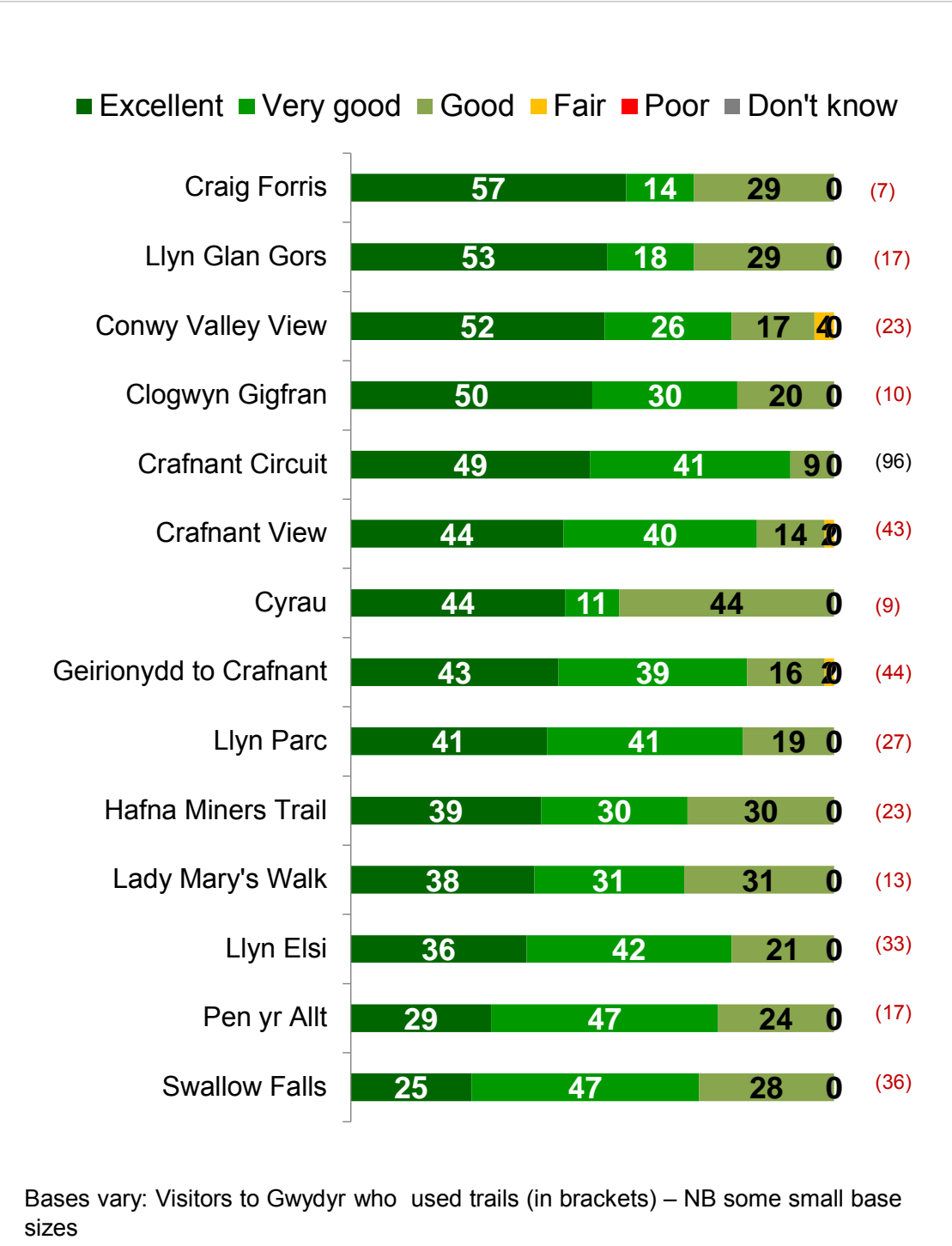


Table 16 compares the proportions giving ‘excellent’ ratings to the walks and trails used in 2013 compared to 2010.

For the walks and trails listed, the proportions who gave an ‘excellent’ rating increased quite markedly for most since the previous research study at Gwydyr in 2010. The greatest increase was seen for Llyn Glan Gors (46% increase) – see Table 16 below.


Table 16: Q20b – Proportions rating facilities walks and trails as ‘Excellent’ 2013 vs. 2010

Facilities	Gwydyr 2013 %	Gwydyr 2010 %	% change
Craig Forris	57	50	+7
Llyn Glan Gors	53	7	+46
Conwy Valley View	52	27	+25
Clogwyn Gigfran	50	7	+43
Crafnant Circuit	49	16	+33
Crafnant View	44	12	+32
Cyrau	44	22	+22
Geirionydd to Crafnant	43	19	+24
Llyn Parc	41	0	+41
Hafna Miners Trail	39	15	+24
Lady Mary’s Walk	38	14	+24
Llyn Elsi	36	10	+26
Pen yr Allt	29	18	+11
Swallow Falls	25	23	+2

Bases vary: visitors using each facility

Appendix I

Questionnaire

 2 Museum Place, Cardiff, CF10 3BG	B01326-1 NRW / FCE Quality of Visitor Experience FINAL questionnaire GWYDYR (CRAFNTANT & TY'N LLWYN)	FOR OFFICE USE ONLY		INTERVIEWER RECORD WEATHER CONDITIONS (3-6m) CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____
	Case No.	Point (1-2)		

APPROACH ADULTS AGED 16+ - READ OUT

Hello, my name is of Beaufort Research. We are conducting some market research in this area on behalf of Natural Resources Wales 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**

WALES ONLY

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

- Yes – fluently 1
 Yes – but not fluently 2
 No

(7)

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 3
 Part of a longer holiday / visit 4
 Don't know

(18)

1
2

5

SHOWCARD B

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

SINGLE CODE

1 st visit	Every day	4-6 x per week	1-3 x per week	1-3 x per month	4-6 x per year	1-3 x per year	Less often	DK
1	2	3	4 5		6	7 8		9

(20)

SHOWCARD C

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

RECORD IN COLUMN A - 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?

RECORD IN COLUMN B - CODE ALL MENTIONED

ASK ALL - SHOWCARD C AGAIN

Q5 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?

RECORD IN COLUMN C - CODE ALL MENTIONED

ACTIVITY		Column A Q4a (21-24m)	Column B Q4b (29-32m)	Column C Q5 (37-40m)
1	* Cycling on forest roads, tracks or trails	1	1	1
2	* Cycling / mountain biking off trails or tracks	2	2	2
3	* Dog walking	3	3	3
4	* Walking on a sign-posted trail	4	4	4
5	* Walking but not following sign posts	5	5	5
6	* Orienteering	6	6	6
7	Using the café / restaurant / other catering	7	7	7
8	Using the visitor centre / shop	8	8	8
9	Using the play area	9	9	9
10	* Running / jogging	A	A	A
11	Nature / natural history visit	B	B	B
12	Bird watching	C	C	C
13	Photography	D	D	D
14	Motor sports	E	E	E
15	Educational visit	F	F	F
16	* Horse riding / pony trekking	G	G	G
17	Picnic	H	H	H
18	Barbeque	I	I I	
19	Seeing something in the forest	J	J	J
20	Organised event / trip	K	K	K
21	Admiring the views	L	L	L
22	Fishing	M	M M	
23	Meeting / conference	N	N	N
24	Camping	O	O O	
		(25-28m)	(33-36m)	(41-44m)
25	Go Ape!	A	A	A
26	A trim trail / exercise trail	B	B	B
27	A Forest Drive	C	C	C
28	Other (please specify)	X	X	X
	None of these	M	M	M

ASK ALL

SHOWCARD D

Q6 Approximately how long have you spent here today in total?
SINGLE CODE – RECORD IN 1ST ROW OF GRID BELOW

Q7 - ONLY ASK FOR ACTIVITIES THAT HAVE BEEN CODED AT Q4a (COLUMN A)

SHOWCARD D AGAIN

Q7 And approximately how long have you spent here today.....?
SINGLE CODE

	0-15 mins	16-30 mins	31-60 mins	1-2 hours	2-3 hours	3-5 hours	5+ hours	DK	
Q6 – TOTAL HOURS SPENT	1	2	3	4 5 6			7	8	(50)
Q7 - READ OUT IF CODED AT Q4a									
Cycling on forest roads, tracks or trails	1	2	3	4 5 6			7	8	(51)
Cycling / mountain biking off trails or tracks	1	2	3	4 5 6			7	8	(52)
Dog walking	1	2	3	4 5 6			7	8	(53)
Walking on a sign-posted trail	1	2	3	4 5 6			7	8	(54)
Walking but not following sign posts	1	2	3	4 5 6			7	8	(55)
Orienteering	1	2	3	4 5 6			7	8	(56)
Running / jogging	1	2	3	4 5 6			7	8	(57)
Horse riding / pony trekking	1	2	3	4 5 6			7	8	(58)

ASK ALL

SHOWCARD E

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

(59-62m)

Always known about it	1								
Been here before	2								
Word of mouth							3		
Library							4		
Local newspaper	5								
National newspaper	6								
Leaflet	7								
Tourist Board	8								
Road signs	9								
Just passing / en route			A						
Map								B	
Smartphone app		C							
Facebook		D							
Twitter								E	
Forestry Commission website					F				
Natural Resources Wales website					G				
Google		H							
Other website (please specify) _____								X	
Other (please specify) _____								X	
									(63-66m)
Don't know / can't remember			M						

Q9	What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED	(70-73m)
	Peace / tranquillity / relaxation 1 Scenery / views / beautiful 2 Walks / paths / trails Cycle trails / freedom / opportunity to cycle ----- Wildlife / bird watching 5 Fresh air / being outside 6 Exercise / keeping fit 7 Activities / good for / something to do with the children 8 ----- Close to home / convenient 9 Opportunity to spend time with family / friends A Safe environment B Lots to see and / or do C ----- Like forests / trees / variety of trees D Good on-site facilities E Clean / well looked-after F The weather G ----- Been before / wanted to come again H Helpful / pleasant staff I Plenty / cheap / other reference to parking J Cost / value for money K ----- Other (please specify) _____ Nothing Don't know	3 4 ----- 5 8 ----- A C ----- D E F G ----- H I J K ----- X (74-77m) L M
Q10	What, if anything, would enhance your enjoyment of this site? PROBE Anything else? RECORD VERBATIM IF MENTIONS WEATHER, PROBE FOR MORE DETAILS	(78-81m)
	_____ _____ _____ Nothing Don't know	 L M
Q11	What, if anything, interfered with your enjoyment of this site today? PROBE Anything else? RECORD VERBATIM IF MENTIONS WEATHER, PROBE FOR MORE DETAILS	(82-85m)
	_____ _____ _____ Nothing Don't know	 L M

SHOWCARD F

Q12 How would you rate the site in terms of how safe and welcoming it feels?

SINGLE CODE

- Excellent
- Very good 2
- Good 3
- Fair
- Poor
- Very poor 6
- Don't know / not sure 7

ONLY ASK Q13 IF CODED 1-6 AT Q12

Q13 What are the reasons for your rating? **PROBE** Anything else?

RECORD VERBATIM

Don't know

ASK ALL

SHOWCARD G

Q14 Looking at this card, which of these aspects were important to your decision to visit today? **PROBE** Any others?

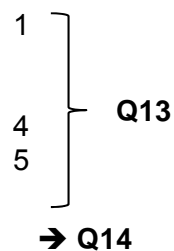
CODE ALL MENTIONED

95-98m		
1	Access to the Beach	1
2	Animal Puzzle Trail	2
3	Arboretum	3
4	Art or Sculpture in the Forest	4
5	Baby Changing Facilities	5
6	BBQ	6
7	Beamer Trampler - motorised wheelchair hire	7
8	Bike Skills Area	8
9	Bike Wash	9
10	Bird Hide	A
11	Bus Links	B
12	Café	C
13	Camp Site	D
14	Caravan Site	E
15	Centre for Contemporary Art and the Natural World	F
16	Choices of Paths for Walking	G
17	Community Discovery Centre	H
18	Community Orchard	I
19	Conference Facilities	J
20	Craft Barns	K
21	Cycle Hire	L
22	Cycle Shop	M
23	Cycling Tracks or Trails	N

99-102m		
24	Disabled Facilities	1
25	Dog Waste Bins	2
26	Easy / All Ability Access	3
27	Educational	4
28	Events	5
29	Fenced Dog Training Area	6
30	Fishing	7
31	Forest Classroom	8
32	Forest Drive	9
33	Forest Holidays	A
34	Forest Shop	B
35	Go Ape!	C
36	Great Oak Hall	D
37	Heritage Site	E
38	Horse Riding	F
39	Information	G
40	Kite Feeding	H
41	Litter Bins	I
42	Motorsports	J
43	Museum	K
44	National Pinetum	L
45	Nature Reserve	M
46	Open grassy areas	N

103-106m		
47	Orienteeing	1
48	Outdoor Arena	2
49	Parking	3
50	Parking charge	4
51	Picnic areas	5
52	Plant Centre	6
53	Play areas and equipment	7
54	Railway	8
55	Restaurant	9
56	Running Trails	A
57	Sensory Garden	B
58	Sign posting of paths and trails	C
59	Staff available at the site	D
60	Toilets	E
61	Trim Trail / Exercise area	F
62	Viewpoint	G
63	Visitor Centre	H
64	Watersports	I
65	Wildlife Activities	J
66	Wildlife Hide	K
67	Youth Shelters	L

(90)



(91-94m)

M

Other (please specify) _____ (107-110m)

SHOWCARD G AGAIN

Q15a Which aspects of the site have you used during your visit today?

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....?

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

ASPECTS USED		Q15a COL. A CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A								
			Excellent	Very good	Good	Fair	Poor	Very poor	DK		
		(120-123m)									
1	Access to the Beach	1	1	2	3	4 5 6			7	(140)	
2	Animal Puzzle Trail	2	1	2	3	4 5 6			7	(141)	
3	Arboretum	3	1	2	3	4 5 6			7	(142)	
4	Art or Sculpture in the Forest	4	1	2	3	4 5 6			7	(143)	
5	Baby Changing Facilities	5	1	2	3	4 5 6			7	(144)	
6	BBQ	6	1	2	3	4 5 6			7	(145)	
7	Beamer Tramper - motorised wheelchair hire	7	1	2	3	4 5 6			7	(146)	
8	Bike Skills Area	8	1	2	3	4 5 6			7	(147)	
9	Bike Wash	9	1	2	3	4 5 6			7	(148)	
10	Bird Hide	A	1	2	3	4 5 6			7	(149)	
11	Bus Links	B	1	2	3	4 5 6			7	(150)	
12	Café	C	1	2	3	4 5 6			7	(151)	
13	Camp Site	D	1	2	3	4 5 6			7	(152)	
14	Caravan Site	E	1	2	3	4 5 6			7	(153)	
15	Centre for Contemporary Art and the Natural World	F	1	2	3	4 5 6			7	(154)	
16	Choices of Paths for Walking	G	1	2	3	4 5 6			7	(155)	
17	Community Discovery Centre	H	1	2	3	4 5 6			7	(156)	
18	Community Orchard	I	1	2	3	4 5 6			7	(157)	
19	Conference Facilities	J	1	2	3	4 5 6			7	(158)	
20	Craft Barns	K	1	2	3	4 5 6			7	(159)	
21	Cycle Hire	L	1	2	3	4 5 6			7	(160)	
22	Cycle Shop	M	1	2	3	4 5 6			7	(161)	
23	Cycling Tracks or Trails	N	1	2	3	4 5 6			7	(162)	
24	Disabled Facilities	O	1	2	3	4 5 6			7	(163)	
		(124-127m)									
25	Dog Waste Bins	1	1	2	3	4 5 6			7	(164)	
26	Easy / All Ability Access	2	1	2	3	4 5 6			7	(165)	
27	Educational	3	1	2	3	4 5 6			7	(166)	
28	Events	4	1	2	3	4 5 6			7	(167)	
29	Fenced Dog Training Area	5	1	2	3	4 5 6			7	(168)	
30	Fishing	6	1	2	3	4 5 6			7	(169)	
31	Forest Classroom	7	1	2	3	4 5 6			7	(170)	
32	Forest Drive	8	1	2	3	4 5 6			7	(171)	
33	Forest Holidays	9	1	2	3	4 5 6			7	(172)	
34	Forest Shop	A	1	2	3	4 5 6			7	(173)	
35	Go Ape!	B	1	2	3	4 5 6			7	(174)	
36	Great Oak Hall	C	1	2	3	4 5 6			7	(175)	
37	Heritage Site	D	1	2	3	4 5 6			7	(176)	
38	Horse Riding	E	1	2	3	4 5 6			7	(177)	

LIST CONTINUED OVERLEAF

39	Information	F	1	2	3	4 5 6		7	(178)
40	Kite Feeding	G	1	2	3	4 5 6		7	(179)
41	Litter Bins	H	1	2	3	4 5 6		7	(180)
42	Motorsports	I	1	2	3	4 5 6		7	(181)
43	Museum	J	1	2	3	4 5 6		7	(182)
44	National Pinetum	K	1	2	3	4 5 6		7	(183)
45	Nature Reserve	L	1	2	3	4 5 6		7	(184)
46	Open grassy areas	M	1	2	3	4 5 6		7	(185)
47	Orienteering	N	1	2	3	4 5 6		7	(186)
48	Outdoor Arena	O	1	2	3	4 5 6		7	(187)
		(128-131m)							
49	Parking	1	1	2	3	4 5 6		7	(188)
50	Parking charge	2	1	2	3	4 5 6		7	(189)
51	Picnic areas	3	1	2	3	4 5 6		7	(190)
52	Plant Centre	4	1	2	3	4 5 6		7	(191)
53	Play areas and equipment	5	1	2	3	4 5 6		7	(192)
54	Railway	6	1	2	3	4 5 6		7	(193)
55	Restaurant	7	1	2	3	4 5 6		7	(194)
56	Running Trails	8	1	2	3	4 5 6		7	(195)
57	Sensory Garden	9	1	2	3	4 5 6		7	(196)
58	Sign posting of paths and trails	A	1	2	3	4 5 6		7	(197)
59	Staff available at the site	B	1	2	3	4 5 6		7	(198)
60	Toilets	C	1	2	3	4 5 6		7	(199)
61	Trim Trail / Exercise area	D	1	2	3	4 5 6		7	(200)
62	Viewpoint	E	1	2	3	4 5 6		7	(201)
63	Visitor Centre	F	1	2	3	4 5 6		7	(202)
64	Watersports	G	1	2	3	4 5 6		7	(203)
65	Wildlife Activities	H	1	2	3	4 5 6		7	(204)
66	Wildlife Hide	I	1	2	3	4 5 6		7	(205)
67	Youth Shelters	J	1	2	3	4 5 6		7	(206)
	None of these	M							
	Don't know	N							

SHOWCARD J

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

- Betws y Coed (town)
- Swallow Falls
- Fairy Glen
- Llyn Geirionydd
- Llyn Sarnau 5
- TY'n Llwyn
- Gwydyr Uchaf
- Gwydyr Castle
- Llanrwst (town) 9
- Capel Curig A
- Hafna
- None of these L
- Don't know / can't remember

(365-368m)

- 1
- 2
- 3
- 4
- 6
- 7
- 8
- B
- M

SHOWCARD K1

Q20a Which of the way marked trails shown on this card have you used?

RECORD IN COLUMN A – CODE ALL MENTIONED

SHOWCARD K2

Q20b And how would you rate....?

ONLY ASK FOR MARKED TRAILS THAT HAVE BEEN CODED AT Q20a – IF 'NONE' OR 'D/K' AT Q20a, SKIP TO Q21, DO NOT ASK Q20b

ASPECTS USED	Q20a COL. A	Q20b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							DK	
	CIRCLE IF USED	Excellent	Very good	Good	Fair	Poor	Very poor			
	(369-372m)									
1 Clogwyn Gigfran	1	1	2	3	4 5 6			7	(373)	
2 Llyn Elsi	2	1	2	3	4 5 6			7	(374)	
3 Cyrau	3	1	2	3	4 5 6			7	(375)	
4 Pen yr Allt	4	1	2	3	4 5 6			7	(376)	
5 Llyn Parc	5	1	2	3	4 5 6			7	(377)	
6 Llyn Glan Gors	6	1	2	3	4 5 6			7	(378)	
7 Hafna Miners Trail	7	1	2	3	4 5 6			7	(379)	
8 Conwy Valley View	8	1	2	3	4 5 6			7	(380)	
9 Geirionydd to Crafnant	9	1	2	3	4 5 6			7	(381)	
10 Crafnant Circuit	A	1	2	3	4 5 6			7	(382)	
11 Crafnant View	B	1	2	3	4 5 6			7	(383)	
12 Swallow Falls	C	1	2	3	4 5 6			7	(384)	
13 Lady Mary's Walk	D	1	2	3	4 5 6			7	(385)	
14 Craig Forris	E	1	2	3	4 5 6			7	(386)	
None of these	F									
Don't know	G									

For office use only: 320-331 and 601, 602 for England sites

ASK ALL

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

Q21 INTERVIEWER RECORD GENDER (603)

- Male 1
- Female 2

Q22 Which of the following age bands do you fall into? (604)

- 16-24 years 1
- 25-34 years 2
- 35-44 years 3
- 45-54 years 4
- 55-64 years 5
- 65+ years 6

- Refused 7

SHOWCARD L

Q23 Which of these best describes your employment status right now?
SINGLE CODE (605)

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

- Refused Z

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.) (606)

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

Job title _____

Position / Grade _____

- AB 1
- C1 2
- C2 3
- DE 4

- Refused 5

Q25 Do you have any children aged 15 or under living in your household? (607)

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? (608)
INCLUDES PROBLEMS RELATED TO OLD AGE

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

SHOWCARD M

Q27 Which of these best describes your ethnic origin? (609)
SINGLE CODE

White British 1
 White Welsh 2
 White Irish 3
 White East European 4
 White other European 5
 Any other White background (please specify) _____ E

Caribbean 6
 African 7
 Any other Black background (please specify) _____ F

Indian 8
 Pakistani 9
 Bangladeshi A
 Any other Asian background (please specify) _____ G

White and Black Caribbean B
 White and Black African C
 White and Asian D
 Any other Mixed background (please specify) _____ H

Chinese J
 Other (please specify) _____ I
 Refused Z

Q28 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

(610)	(611)	(612)	(613)	(614)	(615)	(616)

Overseas visitor (please specify country) _____ (617-618)

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:			
				(621)(622)(623)(624)			
WRITE IN YOUR INTERVIEWER NUMBER →				(625)	(626)	(627)	(628)
B01326-1	F.O.U (BACK CHECKS)		Accompanied	Yes 1	No 2	Supervisor signature	

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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