

Research Report

Quality of the Visitor
Experience 2015

Hafod



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1. Executive summary

1.1 Quality of Visitor Experience Research

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

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

This report summarises the findings from the 140 visitor interviews conducted at Hafod in 2015. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites), and the previous survey conducted at this site in 2012 (where applicable) to track any changes over time.

1.2 Hafod

Hafod Uchtryd, 12 miles south-east of Aberystwyth, located in Ceredigion, west Wales, in the Ystwyth valley is recognised as one of the finest examples in Europe of a Picturesque landscape. In the late eighteenth century, the Hafod Estate was designed in the 'Picturesque' style by Thomas Johnes (1748-1816) and became an essential destination for visitors touring Wales in search of 'wild nature'. The paths, views, gardens and mansion were the subject of numerous contemporary accounts. Today the mansion has gone and Hafod lies within a working forest which is managed by Forestry Commission Wales, in partnership with the Hafod Trust, the estate is managed to conserve and restore the historic landscape, protect its important habitats, and provide access and enjoyment for walkers by recreating Johnes' path network.

Hafod has a range of activities available to visitors including dramatic woodland walks, waterfalls, wonderful views and horse riding.

1.3 Perceptions of the site

Perceptions of Hafod as a place to visit were very positive; this was also the case across all Wales sites. In fact, none of the people interviewed at Hafod in 2015 gave a negative rating of the site.

Visitors were more enthusiastic about the site in 2015 compared to 2012; over half of visitors to Hafod in 2015 gave the site an 'excellent' rating (56%), which was in line with the all Wales average (58%) but slightly higher than the 2012 figure of 49%. The only other noticeable difference between Hafod in 2015 and 2012 was the proportion rating the site as 'good'; 2% gave this rating in 2015, down from 17% in 2012. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 91%, up significantly from the 2012 figure of 83%.

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

Over half of visitors gave this measure an 'excellent' rating (54%); this was a slight improvement on the 2012 survey (46%) and in line with the figure obtained for all Wales sites (52%). Another four in ten (42%) gave a 'very good' rating for how safe and welcoming Hafod felt; this remains unchanged from 2012 but is slightly higher than the all Wales figure of 37%. Only 4% gave Hafod a rating of 'good' or 'fair' in 2015 (down from 12% in 2012); this compared to 10% saying the same across all Wales sites. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 96%, marginally higher than the 2012 figure of 88%.

When asked whether they would be likely to recommend the site as a place to visit to a friend or relative (using a score of 0-10), scores for Hafod and all Wales sites generally were positive, with only 4% of visitors giving a rating of less than 8/10. This was in line with all Wales average, but was lower than the proportion giving lower ratings in 2012 (8%).

Saying that, only around half (51%) gave a rating of 10, which was significantly lower than both the 2012 figure (65%) and the all Wales average (62%). In the recent survey, more visitors gave less enthusiastic ratings of 8 out of 10 (10%) and 9 out of 10 (34%) compared to the previous survey. Despite this slight shift in the numbers giving higher ratings, the overall average rating of the site remained high at 9.4; this equalled the all Wales average score, and was slightly higher than the average rating of 9.0 achieved in 2012.

Looking at the perceived quality of various facilities at the site; ratings of most of the facilities were positive, with the vast majority giving a positive rating of either 'excellent', 'very good' or 'good'.

In fact, the only aspect of the site receiving any negative ratings was the information / interpretation, and only 2% of users gave this a poor rating. For all other aspects / facilities at the site, the ratings were extremely positive; the majority gave an 'excellent' rating for each one.

The feature that received the highest score was the Viewpoint. Nine in ten rated this as 'excellent' (91%) whilst all others rated it as 'very good' (9%). For the other facilities at the site (used by 30 or more people), around eight in ten gave an 'excellent' rating, while the remaining visitors gave a 'very good' or 'good' rating

1.4 Strengths of the site

Two favourite things about Hafod stood out; the most mentioned (by around seven in ten visitors) were the scenery and beautiful views' (75%) and the peace and tranquillity of the site (70%). Another six in ten mentioned the walks, paths and trails (62%). For around half of visitors, their favourite thing about Hafod was the fresh air and open spaces (54%), the opportunity to exercise and keep fit, clean and well maintained appearance of the site, and variety of trees and plants (46% for each). A further four in ten visitors liked the wildlife and bird watching at the site (40%).

Higher proportions of visitors to Hafod in 2015 mentioned favoured aspects of the site compared to both the previous survey conducted in 2012, and across all sites in Wales surveyed 2015.

1.5 Areas for improvement

Over six in ten visitors to Hafod could not think of anything that would add to their enjoyment and only made positive comments (61%). This was higher than both the 2012 figure (48%) and the all Wales average (53%), meaning there were fewer issues with this individual site in 2015 compared to 2012, and compared to all Wales sites in general in 2015.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. Most comments related to wanting more dog poo bins / clearing up of dog poo (11%) and the provision of catering, a café or refreshments (10%). Smaller numbers called for a improvements to the toilets and showers (5%),

improved signage around the site, ore litter bins and more picnic areas (4% for each)

There were calls by small minorities for:

- More seating
- Better parking (easier, cheap, free)
- Improve maintenance of paths / cycle tracks / better surfacing
- More sheltered areas
- Sculptures / more sculptures / repair sculptures
- Plant more trees
- More information on wildlife / vegetation / area
- On-site pub
- Drinking water taps
- Bike hire / better bikes / bike child seats
- Bike shop / more shops.

1.6 Visitor profile

In 2015, four in ten (41%) of visitors to Hafod were first time visitors; this proportion was slightly higher than the all Wales average (37%) but in line with the 2012 figure of 40% who said they had **never** visited their respective NRW site before. Therefore, around six in ten visitors to Hafod had been to the site previously (59%).

The slight majority of visitors to Hafod were day trippers (54%); this proportion has remained unchanged since 2012, but was slightly lower than the all Wales average of 62%. Therefore, roughly half of visitors to Hafod in 2015 were staying in the area overnight or as part of a longer holiday (46%); this equalled the 2012 figure, but was higher than the all Wales average of 37%.

Amongst the day trip visitors to Hafod, most were local, travelling for less than three hours to reach the site (48%), while amongst staying visitors, most were holidaying in the area (44%).

The gender profile was skewed slightly towards more males than females (56% of visitors were men compared with 44% women), which was very close to the all Wales profile and the 2012 data (58% male and 42% female both).

In terms of age, the profile of visitors to Hafod was slightly older than all Wales average. Two in five (41%) were aged 55 years or older; this figure was higher than both the 2012 survey figures (35%) and the 2015 all Wales average (34%). Younger visitors aged 16-34 made up just 18% of visitors to Hafod in 2015 (16% in 2012; 22% all Wales 2015), while those in the middle-aged group of 35-54 accounted for 38% of visitors (49% in 2012; 43% all Wales 2015).

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). This skew towards ABC1 visitors at Hafod was less pronounced, with 69% of visitors categorised as ABC1, and 30% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

2. Introduction

2.1 Background

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

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

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

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

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

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

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

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

2.2 Research programme

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

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

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

Table 1: Interviewing sites and number of interviews conducted

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

* H = High usage; M = Medium usage

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

The core interviewing period ran from March to October 2015. At Hafod, interviewing took place between 6th April and 18th October, and a total of 127 interviews were conducted.

2.3 Report

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

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

2.4 Data tables

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

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

3. Visitor profile information

3.1 Visitor profile

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

The gender profile was skewed slightly towards more males than females (56% of visitors were male compared with 44% female), which was very close to the all Wales profile and the 2012 data (58% male and 42% female both).

In terms of age, the profile of visitors to Hafod was slightly older than all Wales average. Two in five (41%) were aged 55 years or older; this figure was higher than both the 2012 survey figures (35%) and the 2015 all Wales average (34%). Younger visitors aged 16-34 made up just 18% of visitors to Hafod in 2015 (16% in 2012; 22% all Wales 2015), while those in the middle-aged group of 35-54 accounted for 38% of visitors (49% in 2012; 43% all Wales 2015).

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). This skew towards ABC1 visitors at Hafod was less pronounced, with 69% of visitors categorised as ABC1, and 30% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

No doubt reflecting the socio-economic profile, around half of visitors to Hafod were in full-time employment (51%), which was lower than the all Wales average and the 2012 survey data (59% and 64% respectively). Reflecting the older age profile of visitors to the site, a fifth (20%) were retired (compared to 18% for all Wales); fewer visitors were retired in 2012 (14%).

Again reflecting the older age profile, under a quarter (23%) had children living at home; lower than the all Wales average of 29% (no data for 2012).

The majority of visitors to Hafod were White British / Welsh / Irish (88%), with another tenth of visitors describing their ethnicity as 'White other' (11%). Only a very small minority (1%) described themselves as 'Black / Asian / Mixed'; these figures are in line with the all Wales average.

The proportion of Welsh speakers visiting Hafod was much larger than the all Wales average (25% cf. 13%); moreover this was the highest proportion seen across all sites included in the 2015 research – see Table 2 below for more details.

Table 2: Profile of visitors by key demographics 2015

Demographic groups		Hafod 2015 %	Hafod 2012 %	All Wales %
Gender	Male	56	58	58
	Female	44	42	42
Age	16 - 24	6	3	6
	25 - 34	12	13	16
	35 – 44	19	28	21
	45 – 54	19	21	22
	55 – 64	19	22	19
	65+	22	13	15
	Refused	2	-	1
	Social class	AB	27	
C1		42		43
C2		21		16
DE		9		9
Refused		-		1
Working status	Full-time employee (30+ hours per week)	51	64	59
	Part-time employee (<30 hours per week)	8	10	9
	Self-employed	9	5	6
	On a Government supported training scheme	1	-	<1
	Full-time education	4	1	3
	Unemployed	1	-	1
	Permanently sick / disabled	1	1	1
	Retired	20	14	18
	Looking after the home	4	2	2
	Refused	1	-	1
Limiting illness	Yes – limited a lot / little	5	4	6
	No	94	96	92
	Refused	1	-	2
Children in household	Yes	23		29
	No	77		70
	Refused	-		1

Demographic groups		Hafod 2015 %	Hafod 2012 %	All Wales %
Ethnicity	White – British / Welsh / Irish	88		91
	White – Other	11		7
	Black / Asian / Mixed	1		2
Welsh speaker	Yes	25		13
	No	75		87

Base: All visitors – Hafod 2015 (140); Hafod 2012 (92) All Wales (1,188).

3.2 Group profile

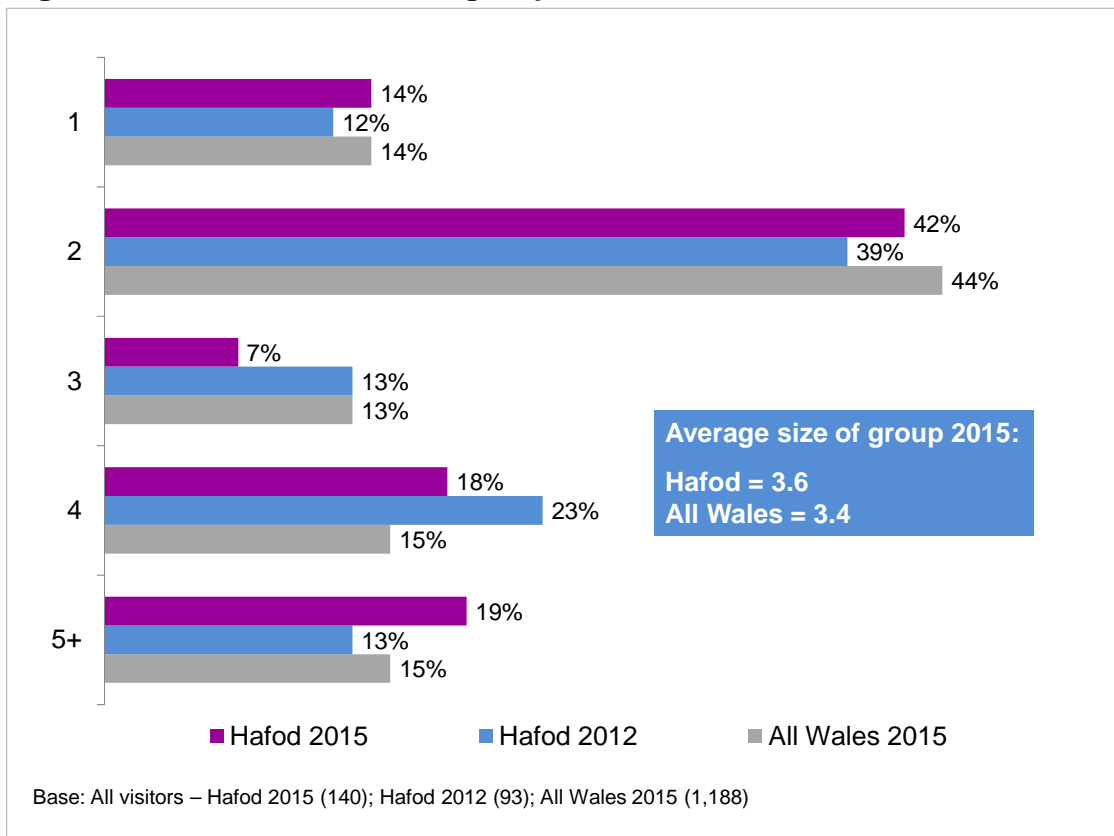
3.2.1 Size of group

Group sizes at Hafod (averaging 3.6 people), were in line with group sizes to all Wales sites (which averaged 3.4 people). Most visitors came to the site in groups of two people (42%); while one in six (14%) came alone.

Just less than one in ten were visiting as part of a three-person group (7%), with the remaining third (37%) visiting in groups of four or more people.

There was very little variation in the distribution of group sizes when compared to both the previous survey conducted in 2012 and the 2015 all Wales average – see Figure 1 below.

Figure 1: Q1. Total size of the group



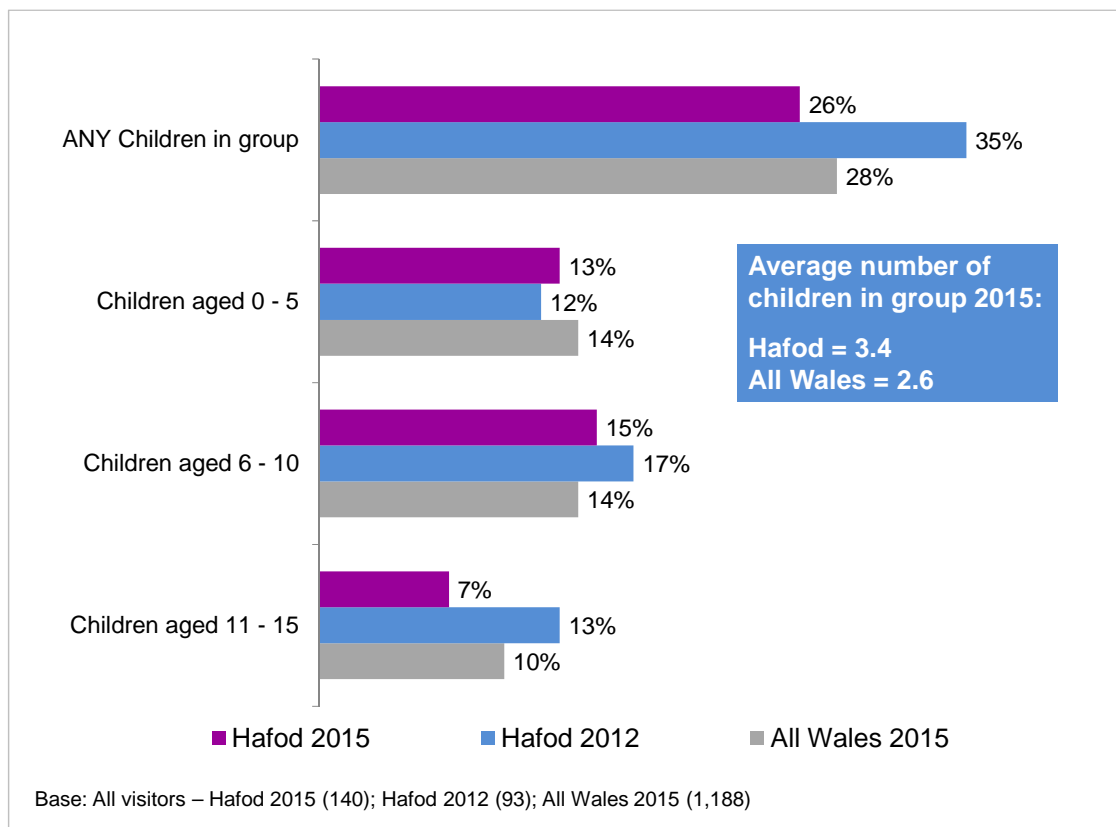
3.2.2 Composition of group

A quarter of the groups who visited Hafod contained children (26%): while this was in line with the 2015 all Wales figure of 28%, it was noticeable lower than the finding from the 2012 survey, when 35% of groups contained children.

While the proportion of visitor groups with children at Hafod was in line with the all Wales average, number of children per group visiting this site was significantly higher than the all Wales average (mean of 3.4 children per group at Hafod compared with 2.6 all Wales).

Children visiting in 2015 were less likely to be aged 11-15 years than was seen in 2012 or across all Wales sites; just 7% of visitor groups contained children of this age (cf. 13% in 2012 and 10% all Wales 2015) - see Figure 2 below.

Figure 2: Q1. Composition of group



4. Profile of visit

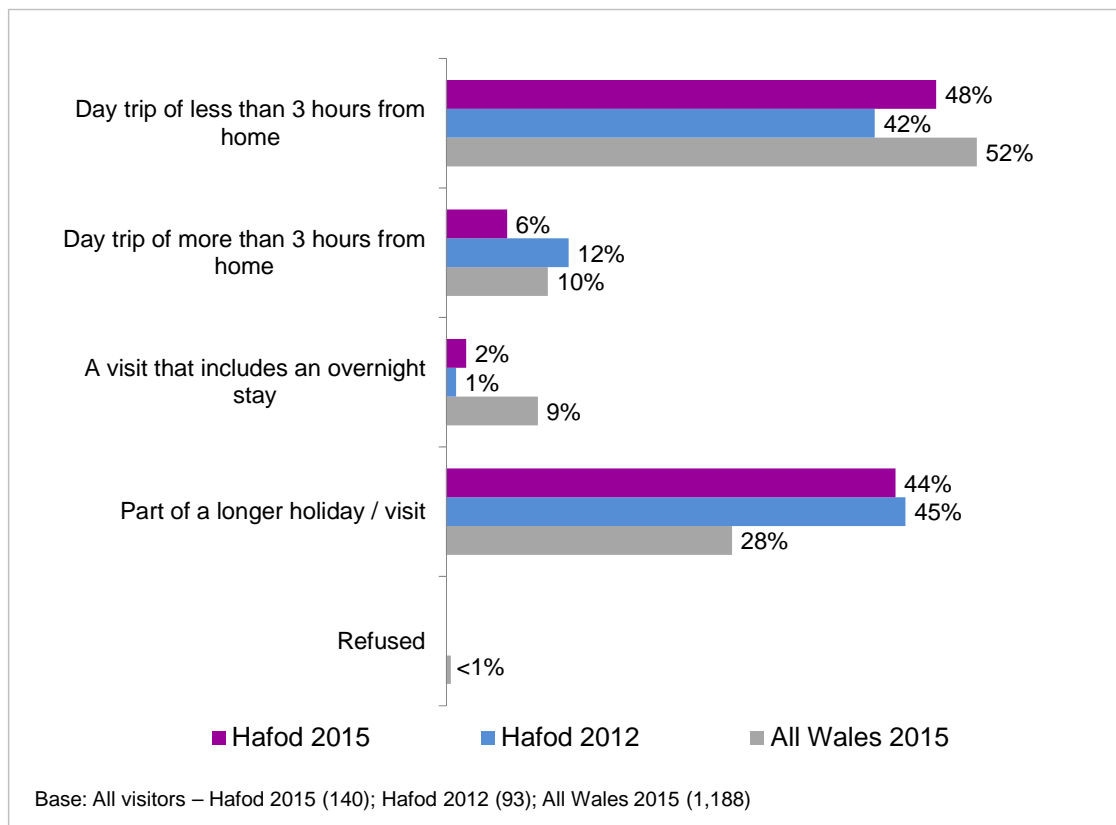
4.1 Type of visit

The slight majority of visitors to Hafod were day trippers (54%); this proportion has remained unchanged since 2012, but was slightly lower than the all Wales average of 62%.

Therefore, roughly half of visitors to Hafod in 2015 were staying in the area overnight or as part of a longer holiday (46%); this equalled the 2012 figure, but was higher than the all Wales average of 37%.

Amongst the day trip visitors to Hafod, most were local, travelling for less than three hours to reach the site (48%), while amongst staying visitors, most were holidaying in the area (44%) – see Figure 3 below.

Figure 3: Q2. Type of visit



4.2 Visitor origin

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

There was a fairly even split between visitors coming from outside of Wales (46%) and those living in Wales (54%). Wales' residents came predominantly from Mid / West Wales (48%), while most of those visiting from outside of Wales resided in England (38%). However, there were double the number of overseas visitors Hafod in 2015 compared to the all Wales average (8% cf. 4%) – Table 3 below and Figure 4 overleaf provide more details.

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

Table 3: Q28b. Visitor origin 2015

Area of residence		Hafod 2015 %	All Wales %
Home region	North Wales	2	4
	Mid / West Wales	48	14
	South West Wales	3	7
	Valleys	-	6
	South East Wales	1	30
	Outside of Wales	46	39
Home nation	Wales	54	61
	England	38	35
	Rest of UK	-	<1
	Abroad	8	4

Base: All visitors – Hafod 2015 (140); All Wales (1,188)

Figure 4a: Map of visitor origin for Hafod 2015

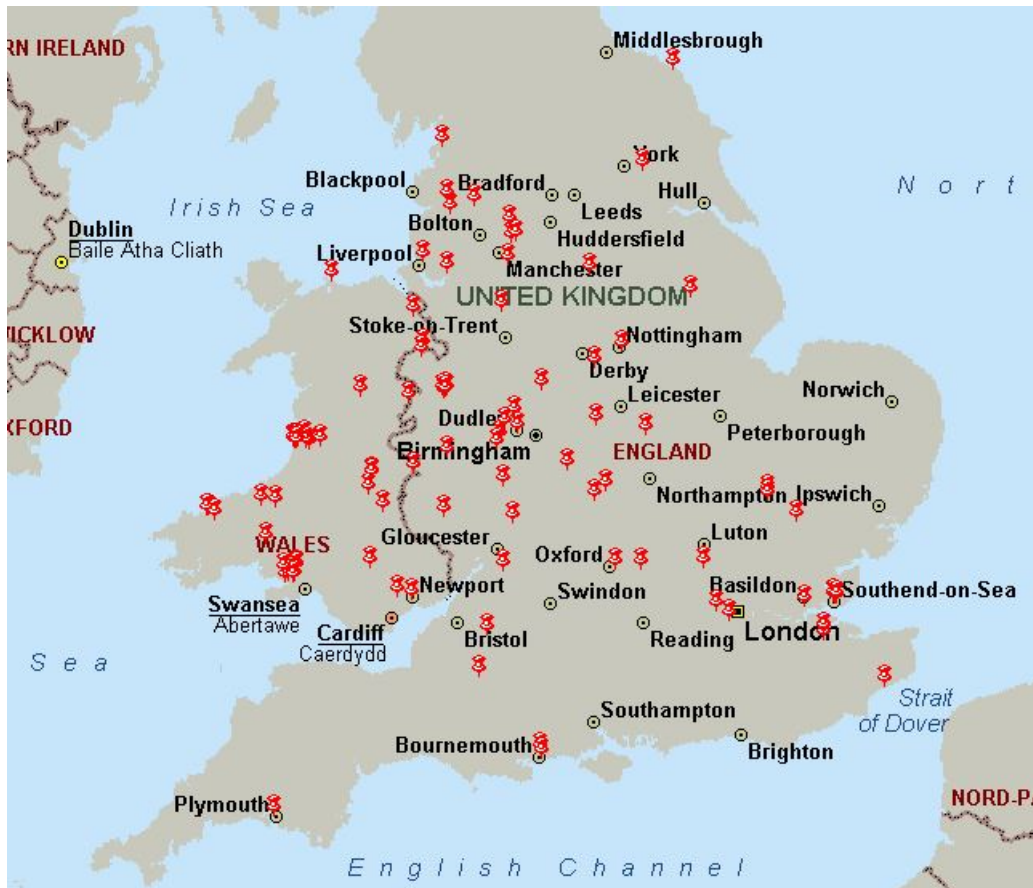


Figure 4b: Map of visitor origin for Hafod 2012



4.3 Frequency of visits

4.3.1 First-time visitors

In 2015, four in ten (41%) of visitors to Hafod were first time visitors; this proportion was slightly higher than the all Wales average (37%) but in line with the 2012 figure of 40% who said they had **never** visited their respective NRW site before.

Therefore, around six in ten visitors to Hafod had been to the site previously (59%).

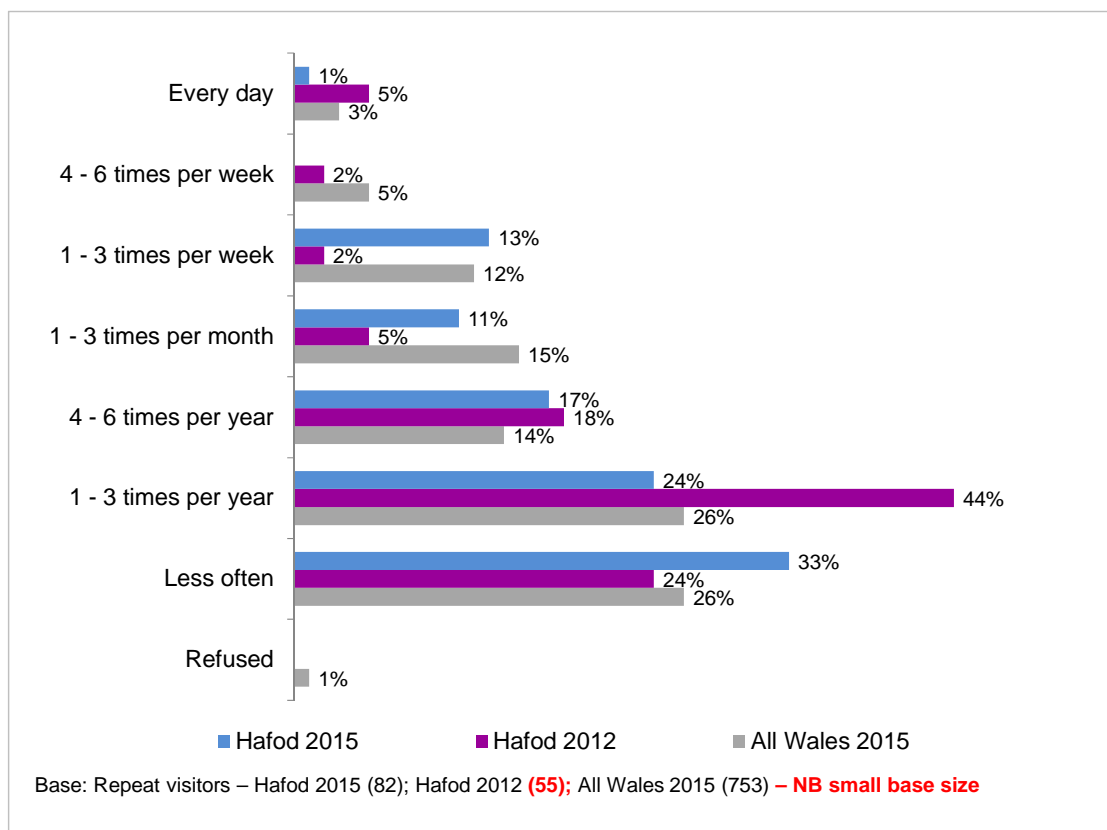
4.3.2 Repeat visitors

Focussing on repeat visitors: the frequency of visiting Hafod in 2015 varied considerably to the data collected in 2012. While the overall proportion of weekly visitors was comparable, in 2012 nearly one in ten (7%) were very regular visitors (coming to the site either every day or every other day). This proportion had dropped to just 1% in 2015, although the proportion coming to the site 1-3 times a week increased from 2% in 2012 to 13% in 2015.

There were also more visitors coming to Hafod 1-3 times a month in 2015 compared to 2012 (11% cf. 5%), and more infrequent visitors coming to the site less often than once a year (33% cf. 24% in 2012). Meanwhile, the proportion visiting 1-3 times a year nearly halved in 2015 (24% cf. 44% in 2012).

Frequency of visits at Hafod in 2015 was more in line with the all Wales average than the 2012 data; the only noticeable difference was a higher proportion of infrequent visitors coming to the site less than once a year (33% cf. 26% all Wales) – see Figure 5 overleaf.

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



4.4 Length of visit

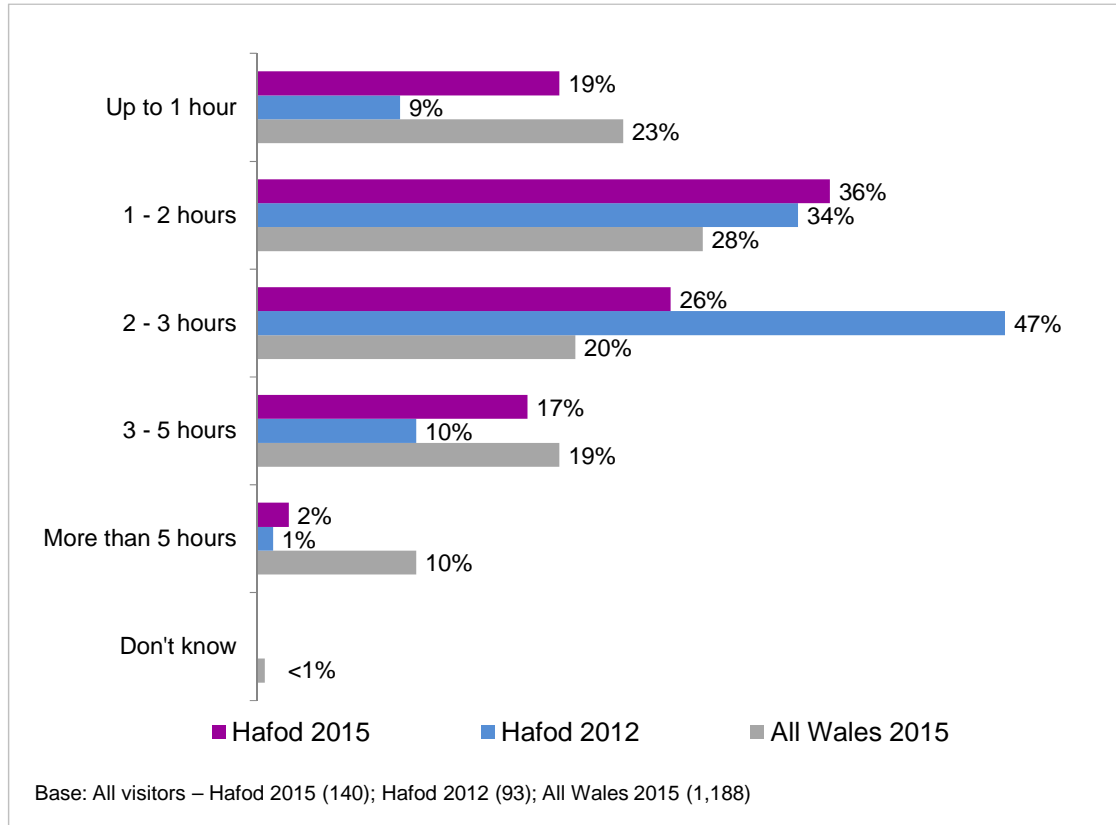
Visitors to Hafod were at the site an average of 2 hours and 7 minutes; slightly shorter than both the average length of stay in 2012 (2 hours 11 minutes) and across all sites in Wales in 2015 (2 hours 24 minutes).

The varying lengths of time visitors spent at Hafod can be seen overleaf. Over half (55%) of visitors were at the site for up to two hours, another two in five (43%) spent between two and five hours at the site, while only a very small proportion were at Hafod for longer than five hours (2%).

There were a few noticeable differences between lengths of time spent at the site in the recent survey compared to both the previous survey and the 2015 all Wales data. For instance, more than double the proportion of visitors spent a fairly short amount of time at the site in 2015, with 19% staying for up to an hour (cf. 9% in 2012). Also, almost half the proportion of visitors spent between two and three hours at the site in 2015 (26%) compared to 2012 (47%).

The most noticeable difference between the 2015 Hafod data and the all Wales data was in the proportion of visitors staying at the site for longer than five hours (2% cf. 10% all Wales) – see Figure 6 below.

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



4.5 Activities undertaken

Visitors were presented with a list of activities and asked which ones they themselves, or others in their group, had either taken part in already, or intended to take part in during their visit. They were able to choose as many activities as applicable, and could choose activities of a similar nature (e.g. walking on trails and walking off trails). Table 4 overleaf comments on activities undertaken by 2% or more of visitors (with the exception of physical activities), and shows the combined figures for the following:

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

The most popular activity at Hafod was walking generally (94%); this was in line with the all Wales average of 92%, but slightly lower than the 2012 figure of 99%. At Hafod, as with all the Wales sites, using sign-posted trails was the most popular mode of walking (72% vs. 68% all Wales), although this proportion had declined from 84% 2012. Dog walking was also fairly popular at this site, with around a third (36%) taking part in this activity (cf. 32% in 2012 and 24% all Wales).

Nobody took part in cycling activities at Hafod in 2015; only 1% took part in cycling at this site in 2012, which equals the all Wales average for 2015. Other physical activities such as running / jogging were also undertaken by only a small proportion of visitors (1%); nobody took part in orienteering / Geocaching or horse riding.

Therefore, the vast majority of visitors took part in 'active' activities (95%), in line with the all Wales figure of 93% and the 2012 figure of 93%.

Just over a half of visitors to Hafod also took part in 'passive' activities (56%); this was in line with the all Wales average (59%). Popular 'passive' activities at Hafod included admiring the views (42%), photography (14%), seeing something in the forest (12%), having a picnic or barbeque (11%) and bird watching (10%) – see Table 4 below.

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

Activities undertaken	Hafod 2015 %	Hafod 2012 %	All Wales 2015 %
Cycling on forest roads, tracks or trails	-	-	1
Cycling off trails or tracks	-	1	1
TOTAL CYCLING	-	1	1
Walking on a sign-posted trail	72	84	68
Walking but not following sign-posts	9	8	28
Dog walking	36	32	24
TOTAL WALKING	94	99	91
Orienteering / Geocaching	-	-	1
Running / jogging	1	-	2
Horse-riding	-	-	<1

Activities undertaken continued	Hafod 2015 %	Hafod 2012 %	All Wales 2015 %
Admiring the views	42	11	24
Photography	14	10	16
Seeing something in the forest	12	2	5
Picnic or barbeque	11	5	12
Bird watching	10	5	13
Nature / natural history visit	8	2	5
Visiting the church	6	-	1
A forest drive	2	-	1
Organised trip / event	1	-	3
Using the play area	1	-	5
Look for wildlife / plants / animals	1	-	1
Site specific event	1	-	<1
Taken part in ACTIVE activities	95	97	93
Taken part in PASSIVE activities	56	Not available	59

Base: All visitors – Hafod 2015 (140); Hafod 2012 (92) All Wales (1,188).

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

4.6 Length of time spent on activities

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

As previously mentioned, visits to Hafod lasted 2 hours and 7 minutes on average. Those walking spent an average of 1 hour and 56 minutes doing this: slightly shorter than average time of 2 hours 7 minutes spent walking at Hafod in 2012.

Nearly three times the proportion of visitors to Hafod in 2015 took fairly short walks (lasting up to one hour) than was seen in 2012 (26% cf. 9%). And while a comparable proportion walked for between one and two hours for both surveys (33% 2015; 40% 2012), significantly fewer walkers at Hafod in 2015 spent more than two hours on this activity (42% cf. 51%) – see Table 5 below for more details.

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

Time at site	Total duration of visit		Time spent on any walking	
	2015	2012	2015	2012
Up to 30 minutes	5	1	8	1
31 – 60 minutes	14	8	18	8
1 – 2 hours	36	34	33	40
2 – 3 hours	26	47	27	40
3 – 5 hours	17	10	14	10
5+ hours	2	1	1	1
Don't know	-	-		1
AVERAGE	2 hours 7 mins	2 hours 11 mins	1 hour 56 mins	2 hours 7 mins

Base: All respondents - 2015 (140); 2012 (92)
 Respondents who walked - 2015 (131); 2012 (91)

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

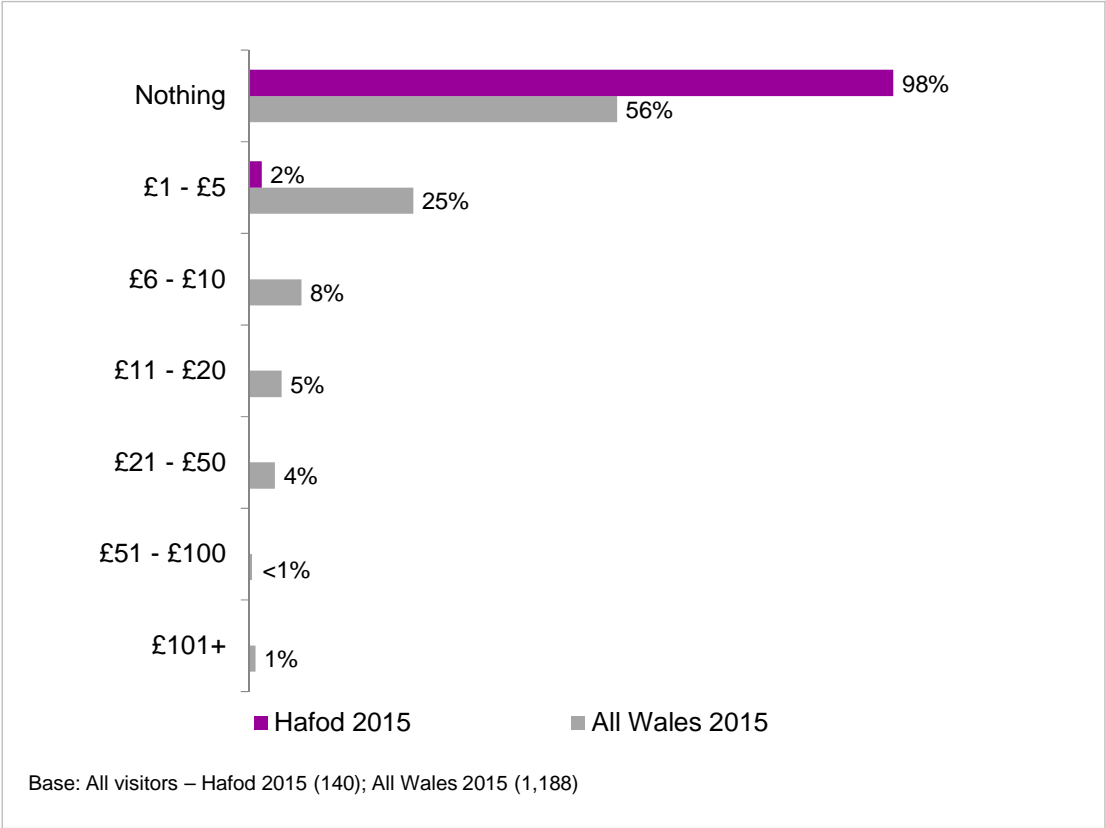
Visitors to Hafod were asked how much they intended to spend at the site during their visit on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. The figures seen in Figure 7 show the figures calculated by combining the data across all types of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

Virtually all visitors to Hafod in 2015 **did not** intend to spend any money at the site (98%); only 2% reported that they would spend up to £5, meaning the average spend at this site was very low at just £0.04.

Across all sites in Wales in 2015, 44% intended to spend money at the site, with the average spend being £6.99 – see Figure 7 below.

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

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



When looking at individual types of spending at the site, the only items that anyone intended to spend money on was souvenirs / gifts, and 'anything else', which included any other items not covered in the list of options (1% for each). The average spend on both of these items (including zeros) was negligible (£0.01 for souvenirs / gifts; £0.02 for anything else) - see Table 6a below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Hafod %	All Wales %	Hafod £	All Wales £
Food and drink	-	22	-	2.16
Activities at the site	-	1	-	1.56
Parking	-	27	-	1.68
Souvenirs / gifts	1	3	0.01	0.41
Hiring equipment	-	1	-	1.11
Anything else	1	1	0.02	0.10

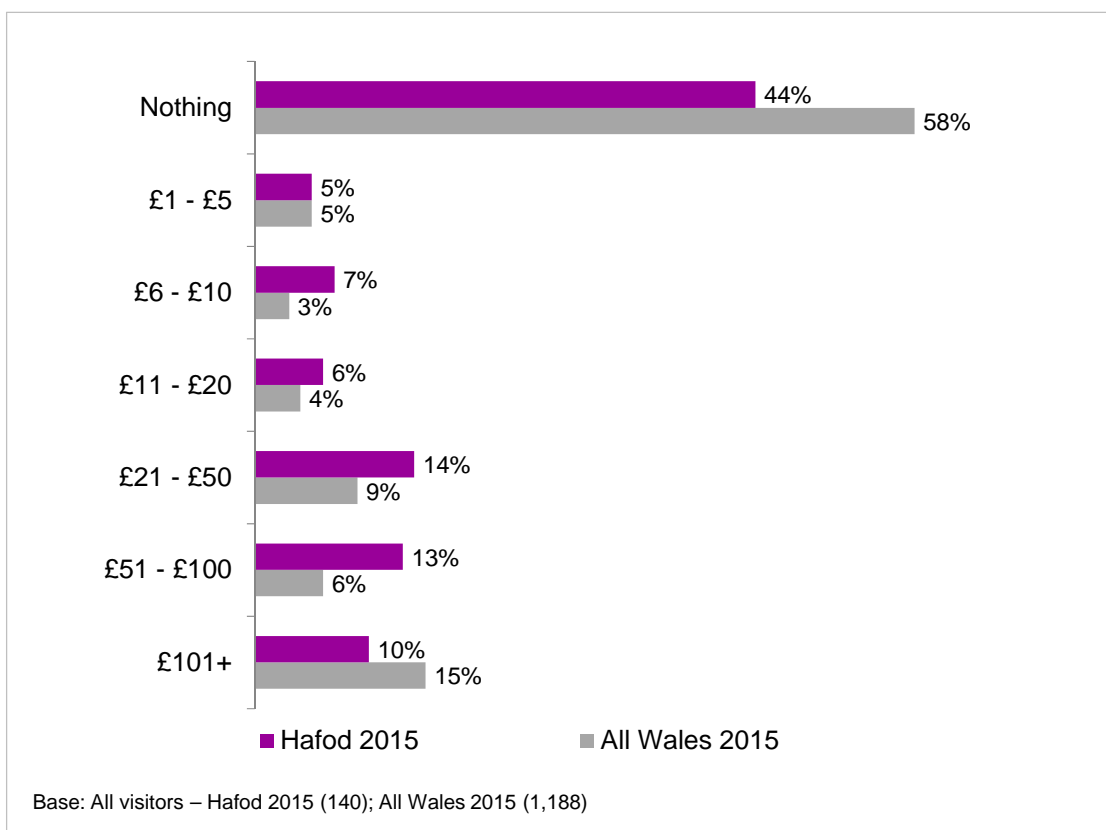
Base: All visitors – Hafod 2015 (140); All Wales 2015 (1,188)

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

In contrast to the data on site-spend, a slight majority of visitors said that they would be spending money in the local area (56%); the intended spend in the local area for Hafod was more in line with the all Wales average.

Most visitors to Hafod intended to spend over £20 (37% cf. 30% all Wales); the resulting average group spend in the area around the site was £67.19, with accommodations accounting for the highest average spend around this site (see Table 6b overleaf). The average spend across all sites in Wales was somewhat higher than this (£87.52), driven by the higher proportion of visitors saying they would be spending more than £101 in the area (15% all Wales cf. 10% at Hafod) – see Figure 8 overleaf.

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



Looking in more detail at spend in the local area as a result of their visit to Hafod, transport (38%) and food and drink (37%) were mentioned by the highest proportions of visitors. However, the highest average spend was on accommodation (£42.01), which was somewhat lower than the all Wales average of £51.81- see Table 6b below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Hafod %	All Wales %	Hafod £	All Wales £
Food and drink	37	29	17.37	21.06
Accommodations	17	19	42.01	51.81
Admissions to other attractions	3	4	2.87	3.99
Parking	4	7	0.43	1.67
Transport	38	22	9.28	9.15
Souvenirs / gifts	11	4	2.02	1.65
Hiring equipment	1	1	0.75	1.82
Anything else	-	2	-	1.02

Base: All visitors – Hafod 2015 (140); All Wales 2015 (1,188)

5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

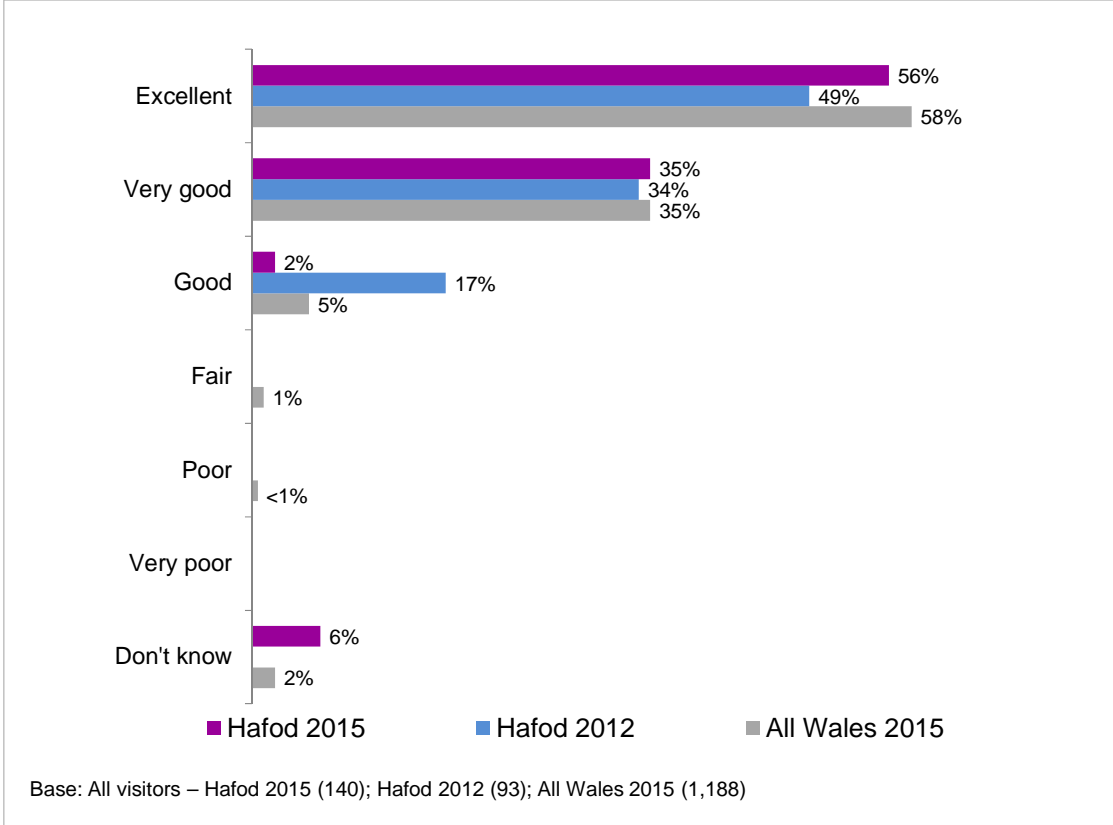
Perceptions of Hafod as a place to visit were very positive; this was also the case across all Wales sites. In fact, none of the people interviewed at Hafod in 2015 gave a negative rating of the site.

Visitors were more enthusiastic about the site in 2015 compared to 2012; over half of visitors to Hafod in 2015 gave the site an 'excellent' rating (56%), which was in line with the all Wales average (58%) but higher than the 2012 figure of 49%.

A further third (35%) rated the site as 'very good' in 2015; this was virtually unchanged from 2012 (34%) and the same as the all Wales average. The only other noticeable difference between Hafod in 2015 and 2012 was the proportion rating the site as 'good'; 2% gave this rating in 2015, down from 17% in 2012.

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 91%, up significantly from the 2012 figure of 83% – see Figure 9 below.

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



5.2 Overall rating of the site as safe and welcoming

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

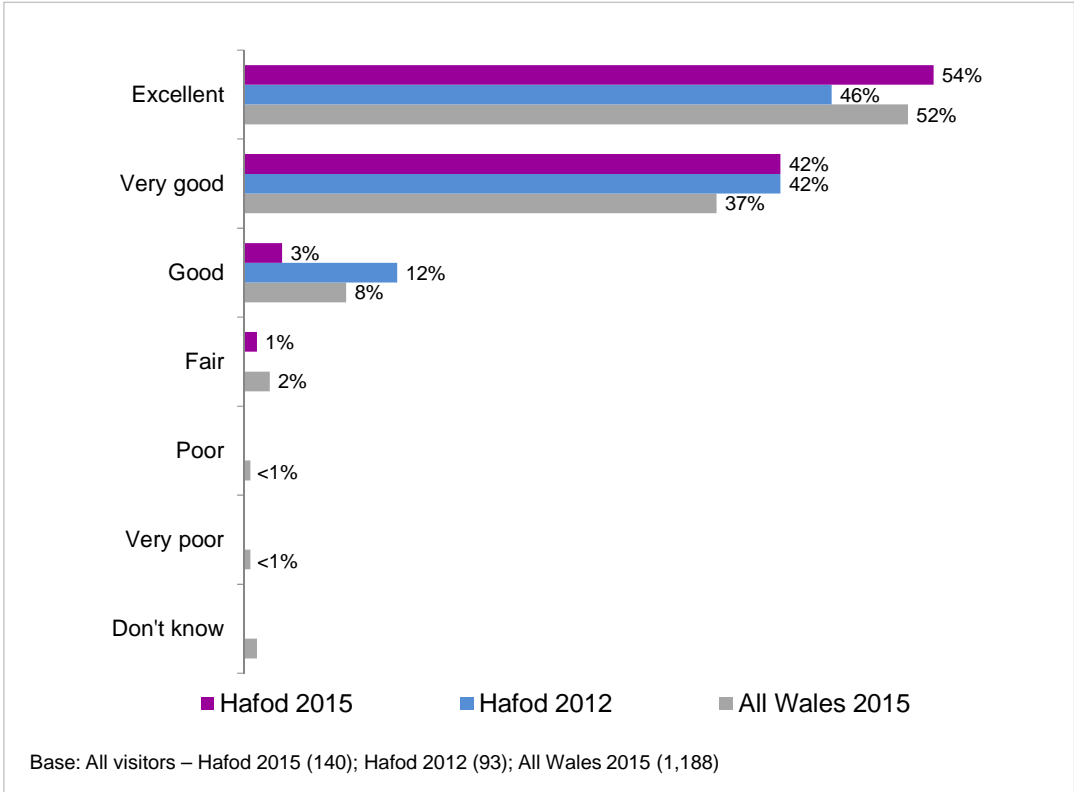
Over half of visitors gave this measure an 'excellent' rating (54%); this was a slight improvement on the 2012 survey (46%) and in line with the figure obtained for all Wales sites (52%).

Another four in ten (42%) gave a 'very good' rating for how safe and welcoming Hafod felt; this remains unchanged from 2012 but is slightly higher than the all Wales figure of 37%.

Only 4% gave Hafod a rating of 'good' or 'fair' in 2015 (down from 12% in 2012); this compared to 10% saying the same across all Wales sites.

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 96%, marginally higher than the 2012 figure of 88% – see Figure 10 below.

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



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

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

The fact that the site was clean, tidy and well maintained was mentioned by the highest proportion of visitors giving a positive rating (59%); this was not mentioned at all in 2012, and was significantly higher than the all Wales position (23%).

Around half of visitors also mentioned the good provision of paths, tracks and trails (55%), the good layout of the site (53%), and the scenery, views and beautiful environment (52%); all of these measures were mentioned by significantly more people at Hafod than across all sites in Wales, and also significantly more people in 2015 than in 2012.

Just under half commented on the good signposting at Hafod, the fresh air and open space, and the generally feeling of safety at the site (49% for each), as well as the feeling of peace and tranquillity (48%) - see Table 7 below.

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

Reasons for a positive rating of site	Hafod 2015 %	Hafod 2012 %	All Wales 2014 %
Clean / tidy / well maintained / litter free	59	-	23
Good provision of paths, trails and tracks	55	10	21
Well laid out / well organised / good set up	53	-	27
The scenery / views / beautiful environment	52	8	40
Well signposted / good maps / information boards	49	28	26
Safe environment generally	49	-	38
Fresh air / open space / freedom	49	-	24
Peaceful / pleasant / tranquil / relaxing / welcoming	48	-	34
Other visitors here are friendly	15	-	10
Good quality facilities or amenities	11	4	12
Live locally / convenient / easy to get to	11	-	5

Reasons for a positive rating of site	Hafod 2015 %	Hafod 2012 %	All Wales 2014 %
Good, safe place for the kids to play and run around	10	-	14
Don't know	2	-	3
General positive comments	1	8	3
Some negative comments	1	-	5

Base: Visitors rating the site as excellent, very good or good – Hafod 2015 (139); Hafod 2012 (82); All Wales 2015 (1,175)

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

- Good car parking (good with horse box)
- Easily accessible for wheelchairs / pushchairs
- Friendly / helpful staff or rangers
- Not too crowded / not too busy (walkers / cyclists).

5.3 Recommending the site as a place to visit

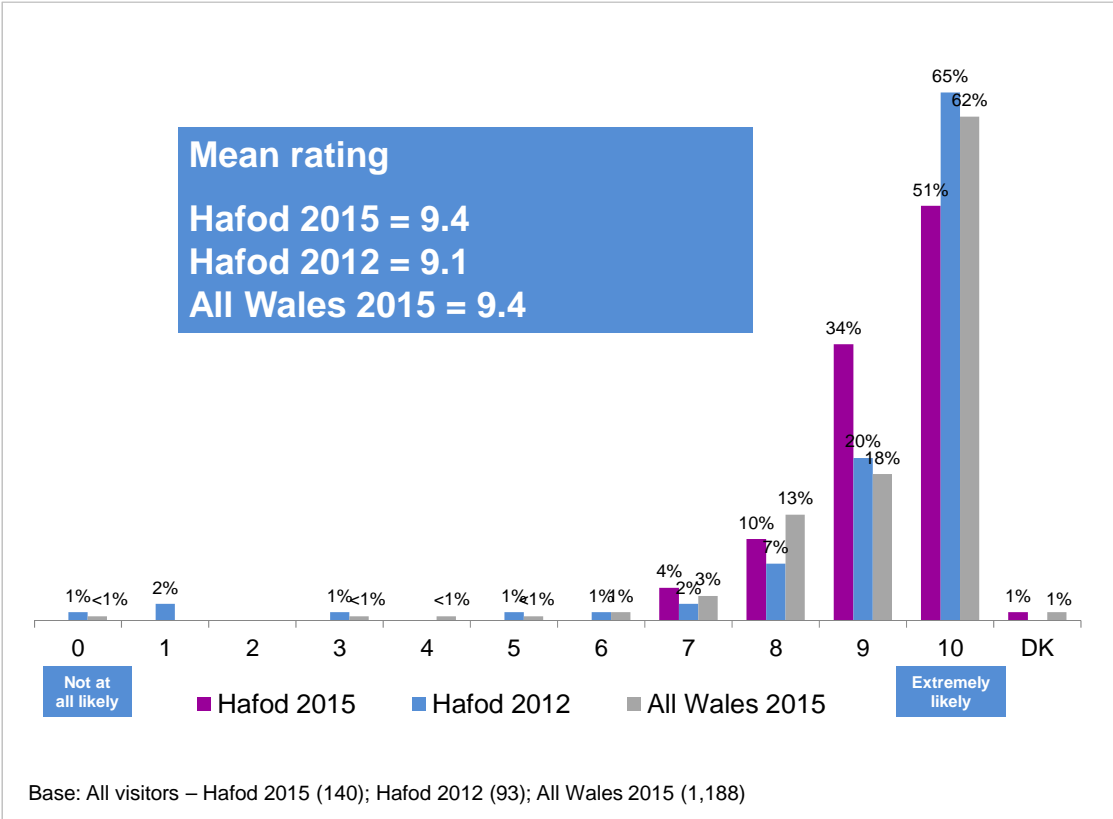
Visitors were asked whether they would be likely to recommend Hafod as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Hafod and all Wales sites generally were positive, with only 4% of visitors giving a rating of less than 8/10. This was in line with all Wales average (6%), but was lower than the proportion giving lower ratings in 2012 (8%).

Saying that, only around half (51%) gave a rating of 10 in 2015, which was significantly lower than both the 2012 figure (65%) and the all Wales average (62%). In the recent survey, more visitors gave less enthusiastic ratings of 8 out of 10 (10%) and 9 out of 10 (34%) compared to the previous survey.

Despite this slight shift in the numbers giving higher ratings, the overall average rating of the site remained high at 9.4; this equalled the all Wales average score, and was slightly higher than the average rating of 9.0 achieved in 2012 - see Figure 11 below.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Hafod is 86, which is higher (by 7 points) than the 2015 all Wales score and 2012 score of 79.

5.4 Strengths of the site

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

Two favourite things about Hafod stood out; the most mentioned (by around seven in ten visitors) were the scenery and beautiful views (75%) and the peace and tranquillity of the site (70%). Another six in ten mentioned the walks, paths and trails (62%).

For around half of visitors, their favourite thing about Hafod was the fresh air and open spaces (54%), the opportunity to exercise and keep fit, clean and well maintained appearance of the site, and variety of trees and plants (46% for each). A further four in ten visitors liked the wildlife and bird watching at the site (40%).

Roughly a third of visitors to Hafod had visited the site before and wanted to come again, or mentioned it was close to their home and convenient to get to (35% and 31% respectively).

Higher proportions of visitors to Hafod in 2015 mentioned favoured aspects of the site compared to both the previous survey conducted in 2012, and across all sites in Wales surveyed 2015 – see Table 8 overleaf for more details.

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

Favourite things about the site	Hafod 2015 %	Hafod 2012 %	All Wales 2015 %
Scenery / views / beautiful/ natural / non-commercial	75	68	62
Peace / tranquillity / relaxation / atmosphere	70	60	56
Walks / paths / trails	62	51	42
Fresh air / being outside	54	26	24
Exercise / keeping fit	46	16	15
Clean / well looked-after	46	3	16
Like forests / trees / variety of trees / plants	40	16	16
Wildlife / bird watching	35	11	21
Been before / wanted to come again	31	8	12
Close to home / convenient / location	22	13	16
Opportunity to spend time with family / friends / family friendly	19	5	6
Safe environment	17	20	9
Lots to see and / or do	16	3	5
The weather	11	-	3
Activities that are good for the children	9	3	9
Rivers / creeks / waterways / waterfalls	8	5	10
Good on-site facilities / BBQ areas / Gift Shop	4	5	9
Plenty / cheap / other reference to parking	4	7	3
The church	2	-	<1
Nothing		-	<1
Don't know	1	-	<1

Base: All visitors – Hafod 2015 (140); Hafod 2012 (93) All Wales (1,188).

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

- Cycle trails / opportunity / freedom to cycle
- Well signposted / good maps / information boards
- Good accessibility
- Helpful / pleasant staff
- Good value for money / cheap / free
- Local / industrial history / historical interest
- Site specific event
- Remote / away from cars / no traffic.

5.5 Areas for improvement

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

Turning firstly to what would enhance their enjoyment of the site. Over six in ten visitors to Hafod could not think of anything that would add to their enjoyment and only made positive comments (61%). This was higher than the all Wales average (53%), meaning there were fewer issues with this individual site compared to all Wales sites in general in 2015.

Any suggestions to improve the site were made by relatively small numbers of visitors, and Table 9 below outlines the comments that were made by 2% or more. Most comments related to wanting more dog poo bins / clearing up of dog poo (11%) and the provision of catering, a café or refreshments (9%).

Smaller numbers called for a improvements to the toilets and showers (5%), improved signage around the site, ore litter bins and more picnic areas (4% for each) - see Table 9 below.

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

Suggested improvements	Hafod 2015 %	All Wales 2015 %
Nothing / general positive comments	61	53
More dog poo bins / remove dog poo	11	9
Provide café / catering / refreshments	9	4
Improve toilets / more toilets / shower facilities / changing area	5	8
Improve signage / more maps / better maps	4	6
More bins / litter bins / recycling bins / less litter	4	9
More picnic areas / BBQ / picnic tables and benches	4	2
More activities for children / more play areas	2	1
More trails / paths / cycle tracks	2	1
Better weather / more sunshine	2	2
Don't know	1	1

Base: All visitors – Hafod 2015 (140); All Wales (1,188).

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

- More seating
- Better parking (easier, cheap, free)
- Improve maintenance of paths / cycle tracks / better surfacing
- More sheltered areas
- Sculptures / more sculptures / repair sculptures
- Plant more trees
- More information on wildlife / vegetation / area
- On-site pub
- Drinking water taps
- Bike hire / better bikes / bike child seats
- Bike shop / more shops.

In 2012, almost half (48%) said ‘nothing’ would enhance the enjoyment of their visit. The most commonly mentioned enhancements mentioned aspects related to improving the environment (28%) or facilities (20%) in some way, whilst 2% mentioned activities. A further 9% of visitors mentioned improving signage and 8% mentioned a café / refreshments / catering or improved weather / climate control.

Returning to the results of the most recent survey; when asked if there was anything that interfered with their enjoyment of their visit to Hafod, the vast majority (80%) reported that nothing had. This was in line with the 2012 figure of 83% but much higher than the 2015 all Wales average of 68%, indicating that fewer people felt that something had interfered with their enjoyment at Hafod (20%) compared to all sites in Wales (32%).

The comments made were mentioned by very small proportions, and Table 10 below details those made by 2% of the sample or more. Only two issues were mentioned by more than 2%, both of which were environmental factors and difficult to control; the bad weather (9%) and midges at the site (4%) – see Table 10 below.

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

Problem areas	Hafod 2015 %	All Wales 2015 %
Nothing	80	68
Wet / raining / windy (poor weather)	9	8
Midges	4	1
Don't know	-	<1

Base: All visitors – Hafod 2015 (140); All Wales (1,188).

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

- Signs unclear / need better signs / more maps
- Problems with car parks / faulty machines / limited spaces
- Need more litter bins / recycling bins / too much litter)
- Comments on work being carried out (noise, dust)
- Too busy / too many kids
- Toilets – not enough / closed / out of order / cleaner toilets / no changing
- Lack of information / education about nature, forest, history
- Too hot
- Problems getting around the site (e.g. trails closed, no disabled access).

In 2012, the majority of respondents (83%) said nothing had interfered with the enjoyment of their visit, with the remainder (17%) providing a comment. Comments mentioned by more than one person related to the weather (8%).

6. Site facilities

6.1 Importance of site facilities

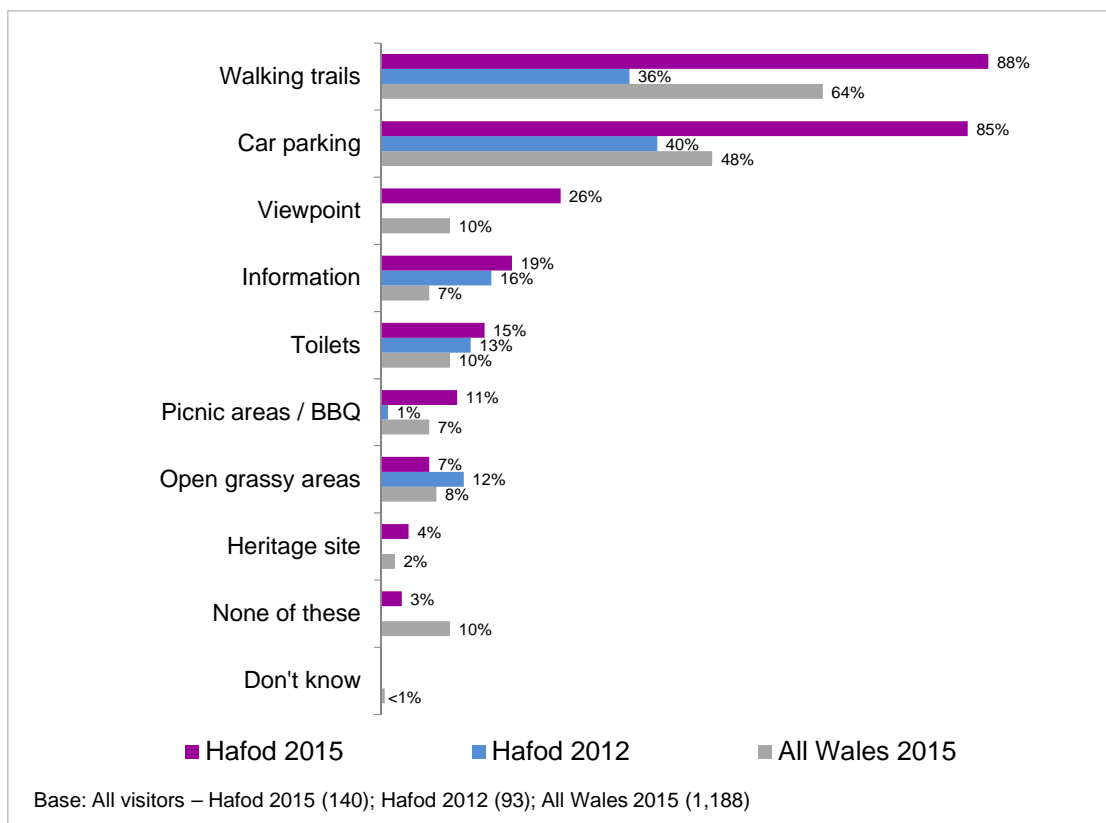
Visitors were presented with a list of facilities available at Hafod and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

Walking trails and car parking were mentioned by the highest proportions of visitors to Hafod (88% and 85% respectively); these were by far the most commonly mentioned aspects of the site influencing visitors' decisions to visit, and both of these were spoken of by significantly more visitors to Hafod in 2015 compared to 2012, and across all Wales sites in 2015.

Other aspects of the site were mentioned by much smaller numbers of visitors; a quarter said that the Viewpoint has been important to them when choosing to visit (26%); this was not mentioned in 2012 and only commented on by 10% of visitors across all Wales sites in 2015.

Two in ten mentioned the information at the site (19%), while around one in ten mentioned the toilets (15%), picnic / BBQ areas (11%) and the open grassy areas (7%) – see Figure 12 overleaf.

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



Certain other factors (apart from site facilities) were important to almost eight in ten visitors when choosing to come to the site (79%), and those mentioned by more than 2% of visitors are outlined below. It should be noted that there were more of these factors mentioned at Hafod in 2015 than any other site in Wales included in the survey.

The beautiful scenery and views were commented on by just over one in ten visitors to Hafod (13%), while a similar proportion (10%) reported that a friend, family member or owner of a B&B (staying visitors) has recommended Hafod as a place to visit.

Just less than one in ten said that it was important to them that the site was dog friendly, that it was close to where they were staying on holiday, or that they wanted to go walking or cycling (8% for each). A further 7% said they had been before and wanted to come again, or that the site was close to their home - see Table 11 overleaf.

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

Spontaneous mentions	Hafod 2015 %	All Wales 2015 %
Nothing	21	53
Beautiful scenery / views / natural beauty	13	4
Friend / family / owner of B&B recommended it / word of mouth	10	2
Dog friendly / dogs can come off leads / dog facilities	8	4
Close to where I am staying (staying visitors) / parents live locally	8	3
Wanted to go walking / cycling	8	4
Live locally / convenient / easy to get to / easy access / close to me	7	5
Been before / come here a lot / good memories	7	2
Meeting / visiting with family and friends (bring family)	5	3
Good for the children / children like it / can run around and play	4	3
Relaxing / peaceful / tranquil / quiet	4	2
Was just passing by / en route / was in the area	4	5
Good facilities	3	4
Good weather / sunny / warm	2	3
A day out / nice day out / good day out	2	1
Negative comments / recommendations	2	1
Easy to find / get to (transport links, signposting, shuttle bus to site)	2	1

Base: All visitors – Hafod 2015 (140); All Wales (1,188)

Other factors were mentioned by one or two visitors:

- With work / team building
- Read about it on a website / magazine
- Not too busy
- Good parking / cheap / free
- Fishing / using the river / lake
- Outdoors / fresh air / open spaces
- Good trails for cyclists and walkers / well maintained (not muddy)
- Safe environment / safe place to go walking on my own
- To see wildlife / birdwatching (includes feeding the ducks)
- Good value for money / cheap / free
- Something different / a change.

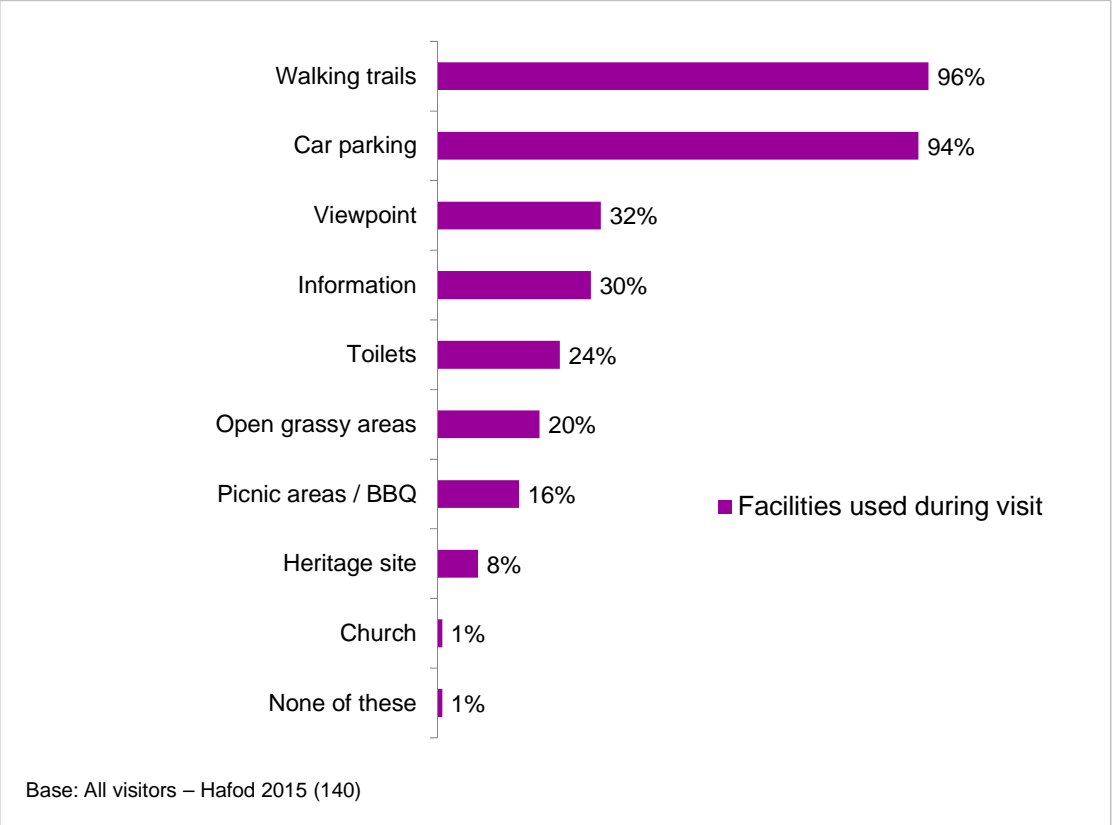
6.2 Facilities used

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

The facilities used reflected to a large extent visitors' views of the importance of facilities. Walking trails (96%) and car parking (94%) were used by the vast majority of visitors to Hafod in 2015. These were by far the most commonly used aspects of the site.

A third of visitors to the site had seen the Viewpoint or used the information available around the forest (32% and 30% respectively), while a quarter had used the toilets (24%). Another two in ten had used the open grassy areas (20%) or the picnic areas / BBQ (16%) – see Figure 13 below for more details.

Figure 13: Q15a. Facilities used at Hafod 2015



6.3 Rating of site facilities

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

In fact, the only aspect of the site receiving any negative ratings was the information, and only 2% of users gave this a poor rating. For most other facilities at the site, the ratings were extremely positive; the majority gave an ‘excellent’ rating for each one.

The feature that received the highest score was the Viewpoint. Nine in ten rated this as ‘excellent’ (91%) whilst all others rated it as ‘very good’ (9%).

For most other facilities at the site (used by 30 or more people), around eight in ten gave an ‘excellent’ rating, while the remaining visitors gave a ‘very good’ or ‘good’ rating. The exception to this was the toilets; while ratings were still fairly positive, only 33% felt these were ‘excellent’, and most considered them ‘very good’ or ‘good’ (54%) – see Figure 14 below.

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

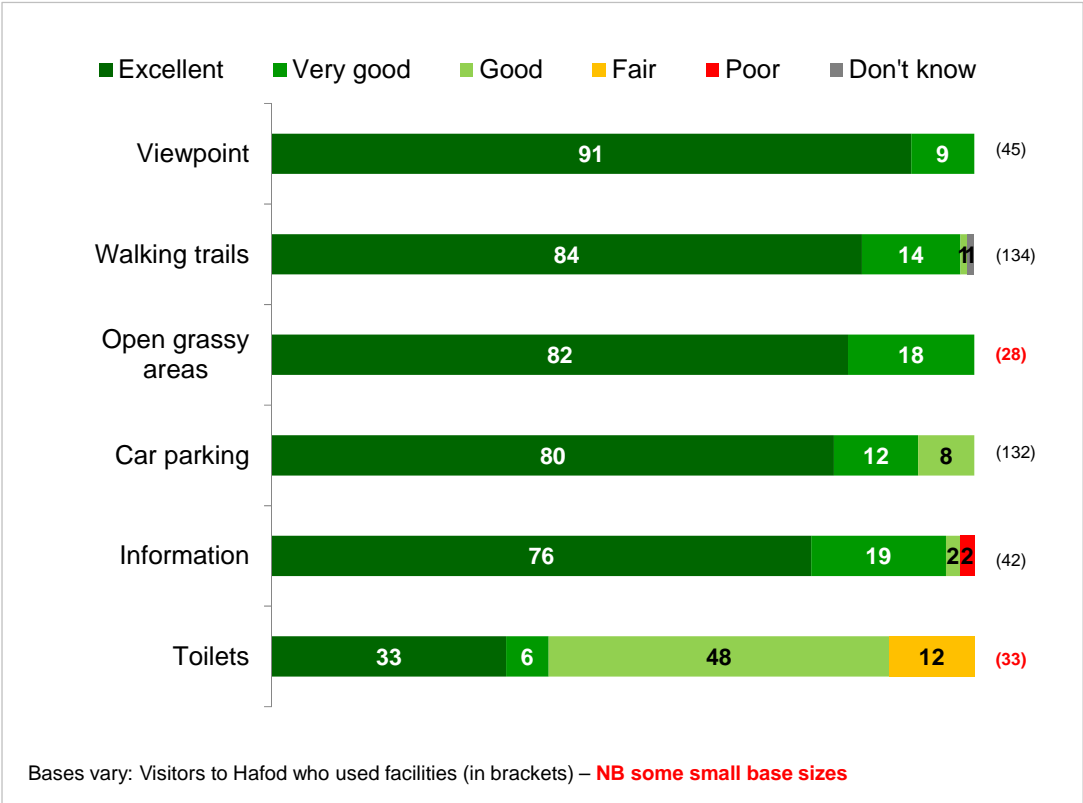


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2014 compared to 2012, where they were mentioned in the previous survey.

Encouragingly, for all of the facilities listed, the proportion who gave an 'excellent' rating has increased considerably since the previous research; the greatest increases were seen for open grassy areas (up by 67%) and car parking (up by 60%).

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

Facilities	Hafod 2015 %	Hafod 2012 %	% point change
Walking trails	84	43	+41
Open grassy areas	82	15	+67
Car parking	80	20	+60
Information	76	24	+52
Toilets	33	5	+28

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 Hafod 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.

Half of visitors had always known about the site (50%); this was the most frequently mentioned source of awareness, higher than the 2012 data (36%) but in line with the 2015 all Wales data (52%).

Around a quarter (26%) heard about Hafod through word of mouth (in line with both 2012 and all Wales sites), while one on six heard of the site from a leaflet (17% cf. 15% in 2012 and just 4% all Wales).

Other sources of information were mentioned by smaller proportions of visitors, and included maps (6%), road signs (5%), Google / internet search engines and guide books (4% for each) – see Table 13 below.

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

Sources of information	Hafod 2015 %	Hafod 2012 %	All Wales 2015 %
Always known about it / been here before	50	36	52
Word of mouth	26	23	21
Leaflet	17	15	4
Map	6	1	4
Road signs	5	5	6
Google / other search engine	4	11	7
Book / guide book	4	-	2
Tourist Information Centre	2	4	2
Just passing / en route	2	5	5
Smartphone app	2	-	<1

Base: All visitors – Hafod 2015 (140); Hafod 2012 (93) All Wales (1,188).

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

- Websites
- Live locally.

8. Visiting other areas and attractions

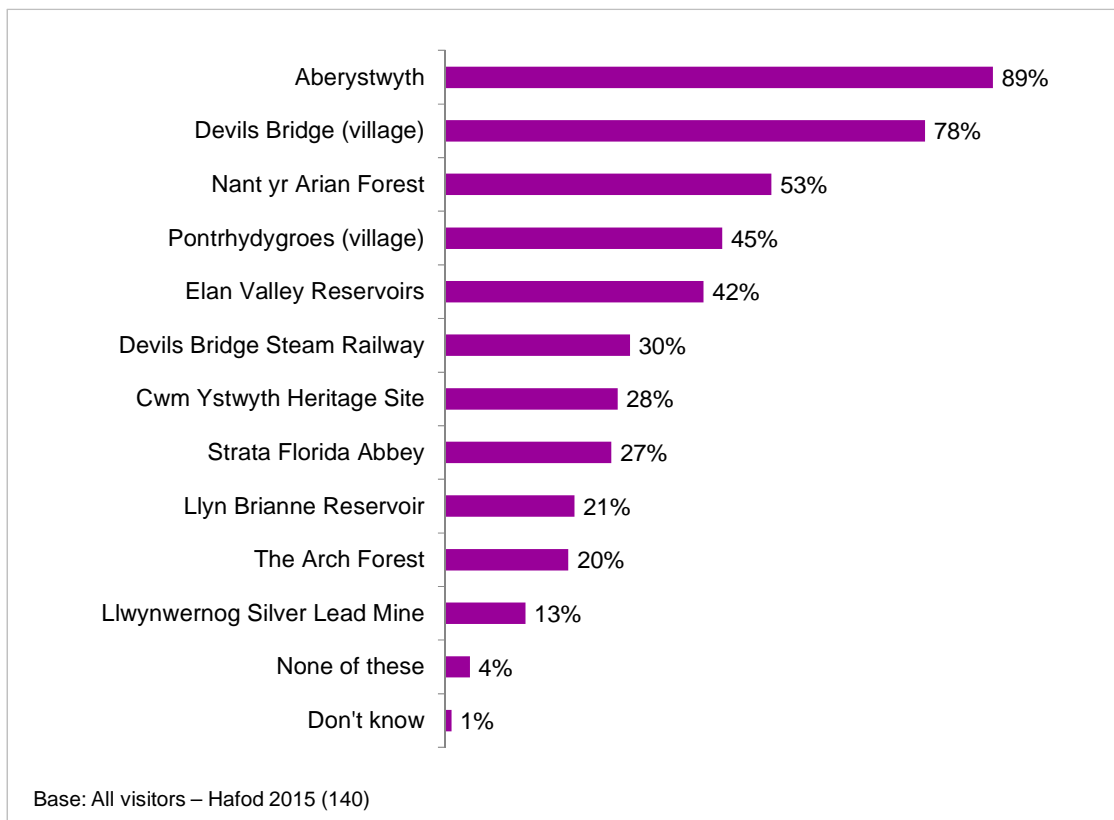
Visitors to Hafod were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: the vast majority (95%) had visited at least one.

Almost nine in ten visitors to Hafod had also visited Aberystwyth (89%); this was the most common response. Another eight in ten (78%) had visited Devil's Bridge.

Just over half of visitors said that they had also been to Nant yr Arian forest (53%), while around four in ten had visited Pontrhydygroes and Elan valley reservoirs (45% and 42% respectively).


Other attractions visited by around three in ten visitors to Hafod included Devil's Bridge Steam Railway (30%), Cwm Ystwyth Heritage Site (28%) and Strata Florida Abbey (27%) – see Figure 15 below for more details.

Figure 15: Q19. Other areas / attractions visited 2015



Appendix I

Questionnaire

 2 Museum Place, Cardiff, CF10 3BG	<u>B01326-3</u> <u>NRW / FCE</u> <u>Quality of Visitor Experience – Year 3</u> <u>FINAL</u>	FOR OFFICE USE ONLY		INTERVIEWER RECORD
				WEATHER CONDITIONS (3-6m) CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____
		Case No.	Point (1-2)	

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

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

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

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

(7)
1
2
3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

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

- English
- Welsh

(8)
1
2

ASK ALL

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

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

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

SHOWCARD A

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

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

(17)
1
2
3
4
5

SHOWCARD B

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

First visit

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

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

ASK ALL

SHOWCARD C

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

PROBE - Any others?

RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

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

RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED

ASK ALL

SHOWCARD C AGAIN

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

RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED

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

ASK ALL

SHOWCARD D

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

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

Don't know

(45)

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

INSTRUCTIONS:

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

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

SHOWCARD D AGAIN

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

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

ASK ALL

SHOWCARD E

<p>Q7 How or where did you find out about this site as a place to visit? CODE ALL MENTIONED</p>	(55-58m)
<p>Always known about it / been here before Word of mouth Newspaper Leaflet Tourist Information Centre</p>	1 2 3 4 5
<p>Road signs Just passing / en route Map Smartphone app Facebook</p>	6 7 8 9 A
<p>Twitter Forestry Commission website Natural Resources Wales website Google / other search engine Other website (please specify) _____</p>	B C D E X
<p>Other (please specify) _____ Don't know / can't remember</p>	(59-62m) X M
<p>Q8 What do you like most about the site? PROBE Anything else? DO NOT PROMPT – CODE ALL MENTIONED</p>	(63-66m)
<p>Peace / tranquillity / relaxation Scenery / views / beautiful Walks / paths / trails Cycle trails / freedom / opportunity to cycle</p>	1 2 3 4
<p>Wildlife / bird watching Fresh air / being outside Exercise / keeping fit Activities that are good for the children</p>	5 6 7 8
<p>Close to home / convenient Opportunity to spend time with family / friends Safe environment Lots to see and / or do</p>	9 A B C
<p>Like forests / trees / variety of trees Good on-site facilities Clean / well looked-after The weather</p>	D E F G
<p>Been before / wanted to come again Helpful / pleasant staff Plenty / cheap / other reference to parking Cost / value for money</p>	H I J K
<p>Other (please specify) ----- ----- Nothing Don't know</p>	(67-70m) L M

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

HAFOD

ASK ALL

SHOWCARD G5

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

CODE ALL MENTIONED

		(105-108m)
A	Car parking	C
		(109-112m)
B	Heritage site	2
C	Horse riding	4
D	Information available / interpretation	5
E	Open grassy areas	9
F	Picnic areas / BBQ	C
G	Toilets	K
H	Viewpoint	M
I	Walking trails	O
		(113-116m)

None of these

M

Don't know

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?

(117-120m)

PROBE Anything else?

RECORD VERBATIM

(121-124m)

Nothing

M

Don't know

N

HAFOD

ASK ALL

SHOWCARD G5 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	Car parking	C	1	2	3	4	5	6	7	(151)
		(129-132m)								
B	Heritage site	2	1	2	3	4	5	6	7	(165)
C	Horse riding	4	1	2	3	4	5	6	7	(167)
D	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
E	Open grassy areas	9	1	2	3	4	5	6	7	(172)
F	Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
G	Toilets	K	1	2	3	4	5	6	7	(183)
H	Viewpoint	M	1	2	3	4	5	6	7	(185)
I	Walking trails	O	1	2	3	4	5	6	7	(187)
		(133-136m)								
OTHERS (WRITE IN)										
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()

None of these
 Don't know

M
 N

ASK ALL

SHOWCARD H AGAIN

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

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

Don't know / not sure

(235)

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

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

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

(236)

SHOWCARD I

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

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

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

SHOWCARD J

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

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

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

HAFOD

FOU: (335-369 FOR Q19)

ASK ALL

SHOWCARD K5 (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

- Aberystwyth
- Cwm Ystwyth (industrial heritage site - mining)
- Devils Bridge (village)
- Devils Bridge Steam Railway
- Elan Valley Reservoirs
- Llwynwernog Silver Lead Mine (Ponterwyd)
- Llyn Brienne Reservoir
- Nant yr Arian Forest
- Pontrhydygroes (village)
- Strata Florida Abbey
- The Arch Forest

- None of these
- Don't know

(355-358m)

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

- L
- M

FOU: (370-410 FOR Q20)

NO Q20 FOR HAFOD

ASK ALL

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

Q21 INTERVIEWER RECORD GENDER

- Male
- Female

(415)
1
2

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

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

- Refused

(416)
1
2
3
4
5
6

7

SHOWCARD M

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

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

- Refused

(417)

1
2
3
4
5
6
7
8
9

Z

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

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

Job title _____

Position / Grade _____

- AB
- C1
- C2
- DE

- Refused

(418)

1
2
3
4

5

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

ASK Q28a AT ENGLAND SITES ONLY

SHOWCARD O (E) AND PURPLE ENGLAND MAP

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

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

- Wales
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(425)

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

ASK Q28b AT WALES SITES ONLY

SHOWCARD O (W) AND WALES MAP

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

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

- England
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(426)

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

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

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

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

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

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

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