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Research Report

Quality of the
Visitor Experience:
Hafren 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 130 visitor interviews conducted at Hafren 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 Hafren

The Forest takes its name from Afon Hafren (River Severn) which rises in a deep, blanket-peat bog, 800m outside its boundary on the slopes of Pumlumon. Before beginning its journey to the Bristol Channel, it passes through woodlands of pine and spruce. It is possible to walk to the Source of the Severn from Hafren Forest, where The Severn Way, Britain's longest riverside walk, begins. The attractive nearby market town of Llanidloes acts as a base for Hafren Forest.

The Forestry Commission is investing in the site in order to make the forest more accessible to everybody. As part of this, the half-mile long Cascades Trail, which takes visitors along the River Severn to picturesque cascades, has 100m of boardwalk which will be fitted with a new anti-slip surface. The trail, which was designed in partnership with local disabled associations, is easy to follow with resting places and a raised platform, allowing people to sit and take in the view. There is also a picnic site which is situated next to a wildflower meadow which is at its best in late July.

The forest has also played host to the Wales Rally GB on a number of occasions.

1.3 Perceptions of the site

Perceptions of Hafren as a place to visit were very positive. This was also the case across all the Welsh sites, and was found in the previous study conducted in 2010. In fact, nobody interviewed at Hafren gave a negative rating of the site.

Three quarters (75%) rated the site as 'excellent'. This was significantly higher than the comparative 2010 Hafren study (42%) and the all Wales average (62%).

Similarly, ratings of how safe and welcoming the site was were also positive, although slightly less so at Hafren compared to the all Wales average and the previous research. Three in ten (30%) visitors to Hafren in 2013 said that the site was 'excellent' in terms of how safe and welcoming it was: this was lower than both the all Wales figure (51%) and the 2010 study (39%).

When asked whether they would be likely to recommend Brechfa as a place to visit to a friend or relative (using a score of 0 - 10), scores for Hafren and all Wales sites in general were positive. This was reflected in the mean scores, with Hafren 2013 standing at 9.3, compared with Hafren 2010 at 8.3 and all Wales at 9.4.

1.4 Strengths of the site

The most mentioned favourite things about Hafren related to 'peace / tranquillity / relaxation' (69%): this was significantly higher than both the 2010 figure (52%) and the all Wales figure (51%).

The scenery / views were mentioned by just over two in five visitors (44%), as were the walks, paths and trails (41%).

One in ten visitors said that the site was clean and well looked after (13%), that there were good on-site facilities (12%) and that they liked the trees (11%).

Only a small proportion of 3% of visitors to Hafren mentioned anything in relation to exercise or keeping fit – this was lower than both the 2010 figure (16%) and the all Wales figure (15%).

1.5 Areas for improvement

Nearly two thirds 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 figure of (47%).

The single most mentioned area for improvement was the provision of more bins: litter and recycling bins (11%) and doo poo bins (9%).

Small proportions of visitors mentioned improving the signage and maps (5%), providing a café or catering van (4%) and improving the toilets / providing showers (3%).

1.6 Visitor profile

The majority of visitors to Hafren had visited the site before (68%). This proportion was slightly lower than the all Wales average of 74% who said they had visited their respective forest sites previously.

Most of the visitors to Hafren travelled for less than three hours to visit the site (58%). Day trips accounted for six in ten (62%) of the Hafren visits. This compares to seven in ten visitors from the 2010 study and all Wales (70% and 72% respectively).

There was a growth in visits to Hafren involving an overnight stay (13% in 2013 vs. 10% in 2010) or as part of a longer holiday visit (25% in 2013 vs. 18% in 2010).

The demographic profile of people who visited Hafren was, on the whole, in line with the all Wales picture. Three fifths of Hafren visitors were male (60%), only slightly higher than the all Wales figure for male visitors in 2013 (59%). Two fifths of visitors to the site (40%) were therefore female (41% all Wales).

Visitors to Hafren were older than average: three in five (61%) were aged 45 or older, compared with just over half of the all Wales sample (54%). Only 14% were aged 16-34 years, compared to 19% of visitors across all Welsh sites.

The Hafren visitors were skewed towards the AB socio-economic groups (50%), which compared with an all Wales AB figure of 40%.

Reflecting the older age profile of visitors, there were more retired people visiting Hafren (27%) than the all Wales average (19%).

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 Hafren, interviewing took place between 29th July and 3rd November 2013, and a total of 130 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Hafren 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 Hafren. Table 2 overleaf details the profile of visitors, compared to the profile of visitors to all sites surveyed in Wales in 2013.

The demographic profile of people who visited Hafren was, on the whole, in line with the all Wales picture.

Three fifths of Hafren visitors were male (60%), only slightly higher than the all Wales figure for male visitors in 2013 (59%). Two fifths of visitors to the site (40%) were therefore female (41% all Wales).

Visitors to Hafren were older than average: three in five (61%) were aged 45 or older, compared with just over half of the all Wales sample (54%). Only 14% were aged 16-34 years, compared to 19% of visitors across all Welsh sites.

The Hafren visitors were skewed towards the AB socio-economic groups (50%), which compared with an all Wales AB figure of 40%.

Reflecting the older age profile of visitors, there were more retired people visiting Hafren (27%) than the all Wales average (19%).

There were fewer than average (25%) visitors to Hafren who had children living in the household, compared with a 30% all Wales figure.

The overwhelming majority of visitors to Hafren were White British / Welsh / Irish (95%), with a small number of visitors describing their ethnicity as 'white other' (2%) or 'black / Asian / mixed' (2%).

Only 6% of visitors to Hafren spoke Welsh: 4% fluently and 2% non-fluently. This was significantly lower than the all Wales average of 20% Welsh speakers (8% fluent, 12% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2013

		Hafren %	All Wales %	
Gender	Male	60	59	
	Female	40	41	
Age	16 - 24	1	6	
	25 - 34	13	15	
	35 – 44	25	25	
	45 – 54	21	21	
	55 – 64	20	18	
	65+	20	15	
Social class	AB	50	40	
	C1	22	30	
	C2	18	19	
	DE	8	9	
	Refused	1	2	
Working status	Full-time employee (30+ hours per week)	57	60	
	Part-time employee (<30 hours per week)	4	8	
	Self-employed	10	6	
	Full-time education	-	2	
	Unemployed	1	1	
	Permanently sick / disabled	-	1	
	Retired	27	19	
	Looking after home	1	2	
	Other	1	<1	
	Refused		1	
Limiting illness	Yes – limited a lot	-	2	
	Yes – limited a little	2	3	
	No	98	94	
	Refused	1	2	
Children in household	Yes	25	30	
	No	75	69	
	Refused	1	1	
Ethnicity	White – British / Welsh / Irish	95	96	
	White – Other	2	2	
	Black / Asian / Mixed	2	1	
	Refused	1	1	
Welsh speaker	Yes	6	20	
	No	94	18	

Base: All visitors – Hafren (130); All Wales (1,114)

3.2 Group profile

3.2.1 Size of group

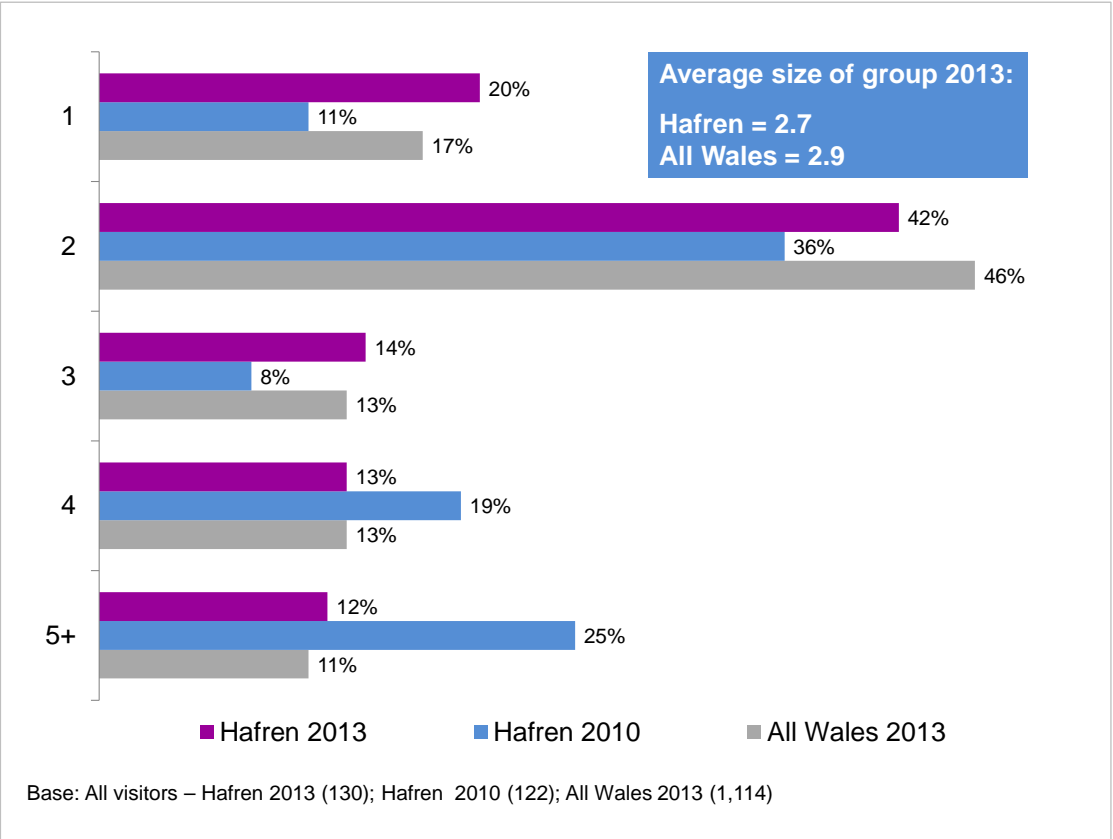
Group sizes were slightly smaller at Hafren (average 2.7 people) compared to the all Wales sample (average 2.9 people).

Two in five visitors to Hafren went there alone (20%). This is considerably higher than the equivalent percentage at Hafren in 2010 (11%) but in line with the all Wales figure (17%).

The highest portion of visitor groups comprised of two people. Here the Hafren figure (42%) was in line with the all Wales figure (46%), but higher than the 2010 study (36%).

Hafren 2013 had a significantly smaller proportion of large group visitors (comprising of 4 or more people) in the 2010 Hafren study (25% vs. 44%), but although this was in line with all Wales figure (25% vs. 24%) – see Figure 1 below.

Figure 1: Q1. Total size of the group

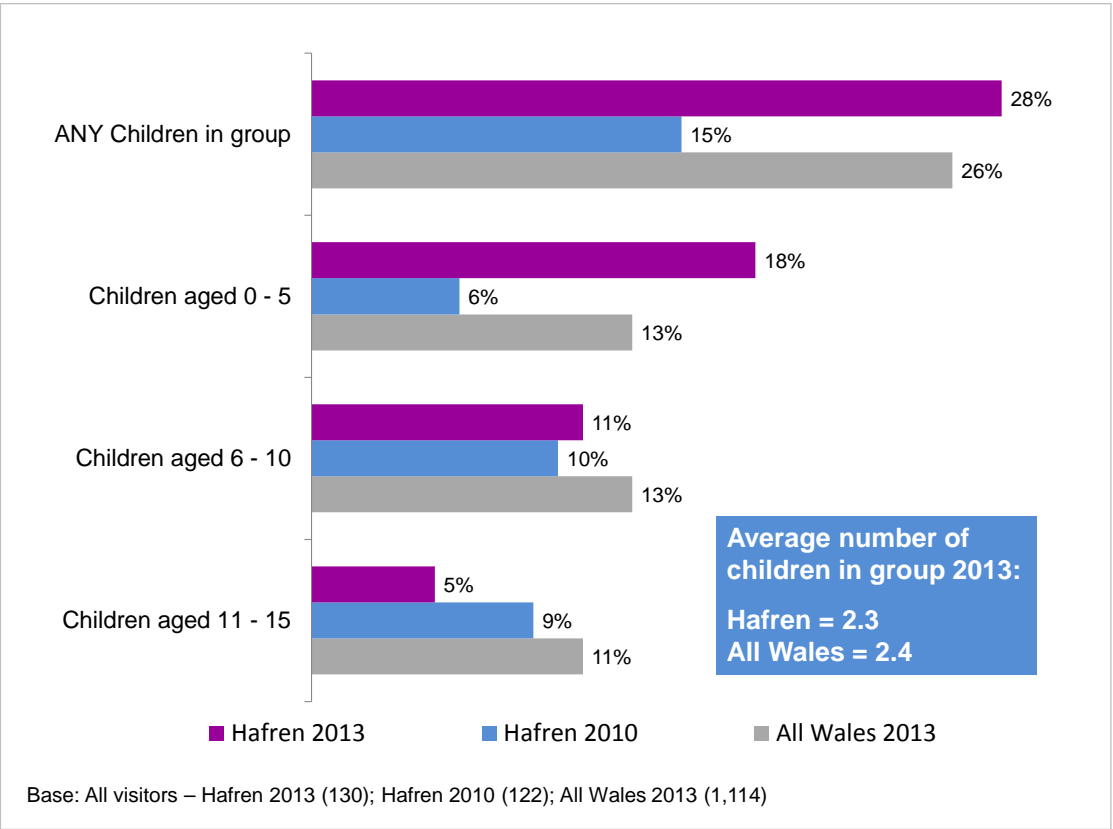


3.2.2 Composition of group

Nearly three in ten visitors to Hafren were accompanied by children (28%). This was slightly higher than for all Wales (26%), and considerably higher than the 2010 Hafren study (15%). The average number of children in the Hafren groups was in line with all Wales (a mean of 2.3 children per group at Hafren compared to 2.4 overall).

Children who visited the site tended to be younger, in the 0-5 years age group (18%). In the previous 2010 study, a higher proportion of children visiting Hafren were aged 11-15 years (9% vs. 5%) – see Figure 2 below.

Figure 2: Q1. Composition of group



4. Profile of visit

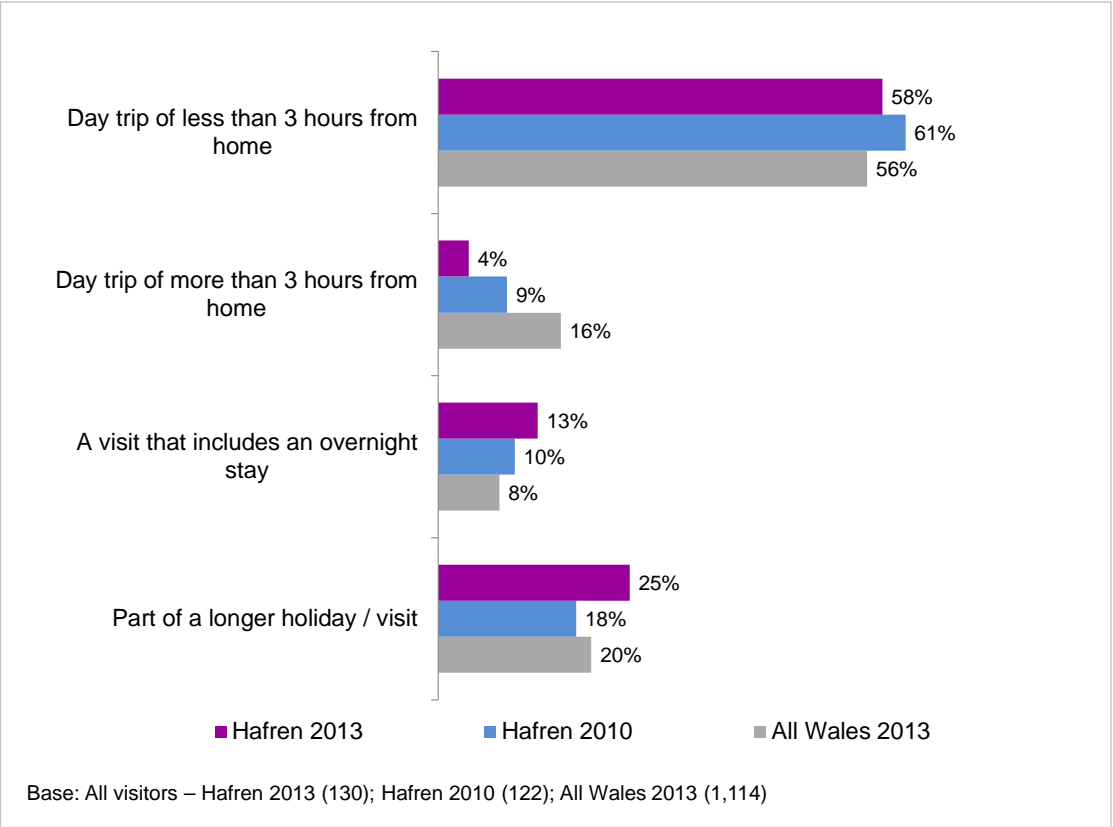
4.1 Type of visit

Most of the visitors to Hafren travelled for less than three hours to visit the site (58%). This proportion was slightly lower than the previous Hafren research (61%) but slightly higher than the all Wales figure (56%).

Day trips accounted for six in ten (62%) of the Hafren visits. This compares to seven in ten visitors from the 2010 study and all Wales (70% and 72% respectively).

There was a growth in visits to Hafren involving an overnight stay (13% in 2013 vs. 10% in 2010) or as part of a longer holiday visit (25% in 2013 vs. 18% in 2010) – 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.

Three in five of the visitors to Hafren came from Wales (59%): this was in line with the all Wales figure (57%). Most of the rest of the Hafren visitors came from England (38%), again in line with the all Wales finding (40%).

The majority of visitors from Wales were from Mid/West Wales, which fits with Hafren's geographical position. Only small proportions travelled from other areas of Wales – Table 3 below and Figure 4 overleaf provide more details.

Table 3: Visitor origin 2013

		Hafren	All Wales
		%	%
Home region	North Wales	2	23
	Mid / West Wales	54	14
	South West Wales	1	11
	Valleys	2	2
	South East Wales	1	7
	Outside of Wales	41	43
Home nation	Wales	59	57
	England	38	40
	Rest of UK	1	<1
	Abroad	2	1
	Refused	-	2

Base: All visitors – Hafren (130); All Wales (1,114)

Figure 4: Map of visitor origin for Hafren



4.3 Frequency of visits

4.3.1 First-time visitors

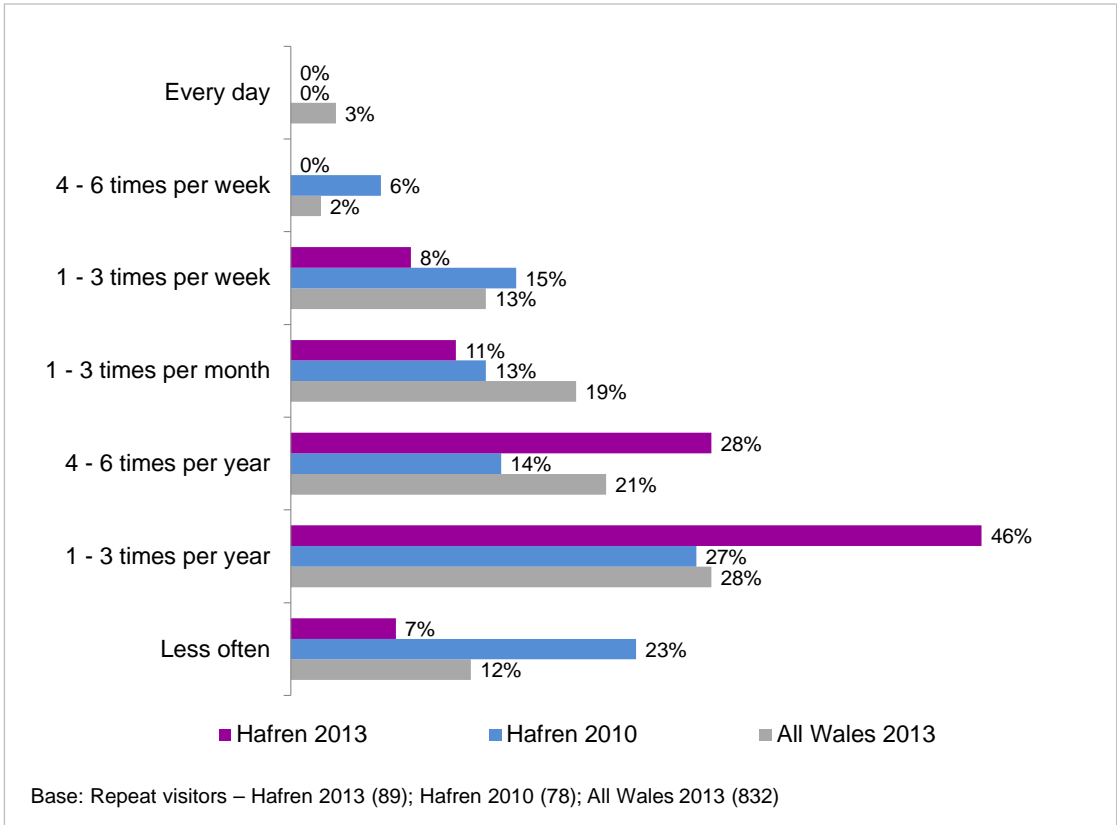
In 2013, around a third of visitors to Hafren (32%) were first-time visitors. This was higher than the all Wales average of 25% who said they had never visited their respective forest sites before.

4.3.2 Repeat visitors

Focussing on repeat visitors (68% of the sample), it can be seen that a large proportion going to Hafren tended to be less regular visitors. Nearly half (46%) visited 1-3 times a year, compared with the Welsh average of 28% and the 2010 figure of 27%. Saying that, the proportion of visitors going to the site less often than once a year decreased in 2013 (7% vs. 23% in 2010).

Compared to 2010, there was a marked decrease in the proportion of those visiting weekly (8% vs. 21%): the weekly visitor proportion was also lower than the all Wales figure (19%) - see Figure 5 below.

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



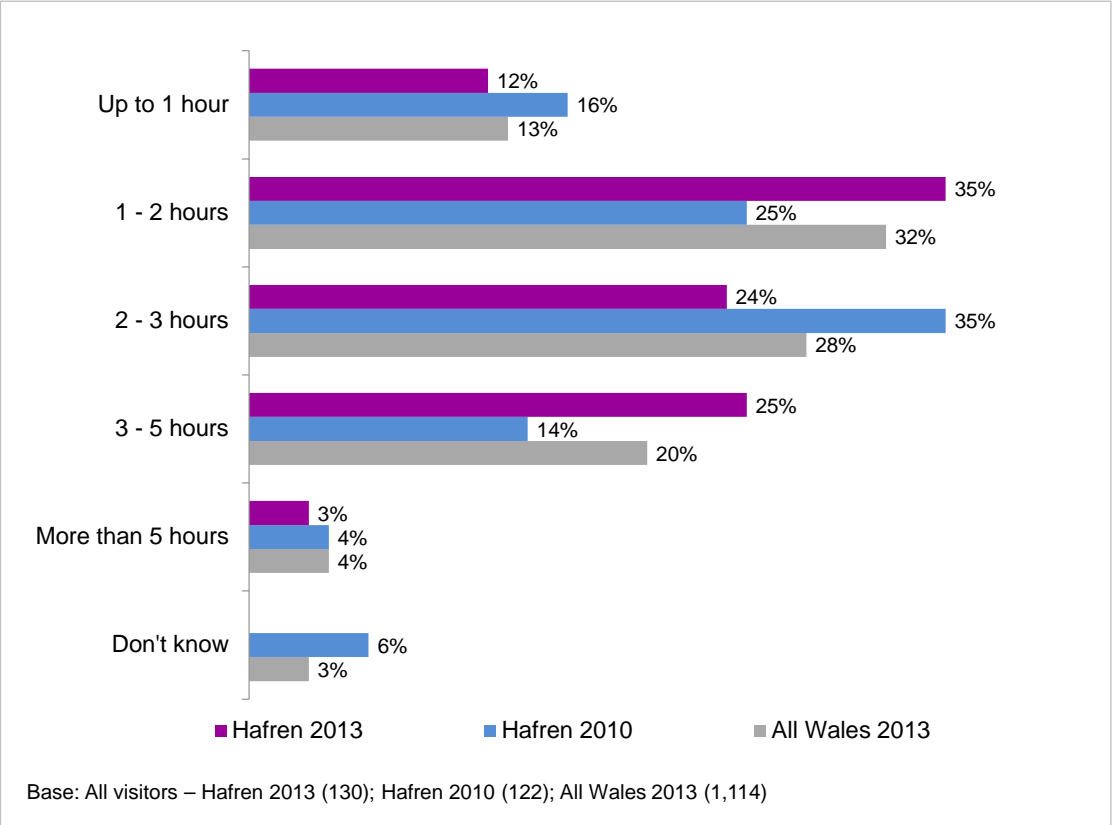
4.4 Length of visit

Visitors stayed at Brechfa for an average of 2 hours and 24 minutes in 2013. This was 8 minutes more than the comparable Hafren study in 2010 (2 hours and 16 minutes) and just two minutes more than the average length of stay across all sites in Wales in 2013 (2 hours and 22 minutes).

In 2010, the highest proportion of visitors stayed at the site between 2-3 hours, while in 2013 the highest proportion stayed 1-2 hours (35%).

There was, however, a marked increase in the proportion of visitors staying at Hafren for more than 3 hours in 2013 (28%) compared to 2010 (18%) – 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.

Compared to other sites across Wales, relatively few activities were available at the Hafren site. This was reflected by the fairly short list of activities mentioned by visitors to Hafren.

By far, the most popular activity at Hafren was walking (94%): this was higher than both the all Wales figure (73%) and the 2010 figure (80%). Three fifths (60%) of visitors walked along a sign-posted trail, while two fifths (39%) walked their dog. Only a relatively small proportion said that they had walked not following the sign-posts (7%).

One in ten visitors to Hafren said that they had admired the views (8%): this was considerably lower than the all Wales average (22%), although no-one mentioned this when interviewing took place in 2010.

Around one in six (7%) had had a picnic or barbeque (compared to 12% in 2010 and 15% across Wales). Photography (5%) and bird watching (3%) were mentioned by one in twenty – see Table 4 overleaf.

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

	Hafren 2013 %	Hafren 2010 %	All Wales 2013 %
Walking on a sign-posted trail	60	64	48
Dog walking	39	21	30
Walking but not following sign-posts	7	21	22
TOTAL WALKING	94	80	73
Admiring the views	8	-	22
Picnic or barbeque	7	12	15
Photography	5	11	8
Bird watching	3	7	4
Nature / natural history visit	1	3	3
Organised trip / event	1	8	1

Base: All visitors – Hafren 2013 (130); Hafren 2010 (122); All Wales 2013 (1,114)

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

Walking on a sign-posted trail was most popular amongst groups including children (81%) and younger visitors aged 16-34 years (72%), while walking but not following the signs was more popular amongst older visitors aged 55+ (12%).

Three quarters (73%) of visitors from England walked on a sign-posted trail, compared to just 2% not following the signs.

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.

As mentioned previously, visits to Hafren lasted on average 2 hours and 24 minutes: visits made by those walking averaged 2 hours and 22 minutes, although a sizable proportion (28%) said that they had walked in the forest for more than three hours.

Compared to 2010, the average time spent walking at Hafren in 2013 increased by 10 minutes - see Table 5 below.

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

	Total duration of visit		Time spent on any walking	
	2013	2010	2013	2010
Up to 30 minutes	3	-	3	2
31 – 60 minutes	8	16	9	14
1 – 2 hours	35	25	36	27
2 – 3 hours	24	35	26	35
3 – 5 hours	25	14	23	13
5+ hours	3	4	3	3
AVERAGE	2 hrs 24 mins	2 hrs 16 mins	2 hrs 22 mins	2 hrs 12 mins

Base: all visitors (130); respondents who walked (121)

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

Visitors to Hafren 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 Hafren in 2010 was not available.

The vast majority of visitors claimed that they would spend up to £5 in the area as a result of their trip (88%), with only one in ten (11%) claiming they would spend any more than this.

The average spend in the area as a result of visiting Hafren was just £1.61, significantly lower than 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

	Hafren 2013	All Wales 2013
	%	%
£0 - £5	88	75
£6 - £10	5	12
£11 - £20	5	6
£21 - £50	1	3
£51+	-	3
AVERAGE	£1.61	£7.23

Base: All visitors – Hafren 2013 (130); All Wales 2013 (1,114)

When looking at individual types of spending, only small proportions of visitors said they would spend on transport (12%), food and drink (10%), accommodation (5%) or non-routine shopping (1%).

None of the visitors to Hafren in 2013 said they would be spending any money in the area on miscellaneous items, admissions fees, parking or hiring equipment.

The average spend on transport was just £1.56, significantly less than the all Wales average of £6.83.

Those saying they would be buying food and drink intended to spend an average of £2.93 – again, this was lower than the all Wales average (£9.22).

Accommodation costs were estimated to be an average of £8.50, compared to £15.65 for all Wales – see Table 7 below.

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

	Proportion of visitors to <u>Hafren</u> spending anything on this item %	Average £ Hafren 2013	Average £ All Wales 2013
Transport including petrol, taxis, public transport	12	1.56	6.83
Food and drink purchased outside any accommodation	10	2.93	9.22
Accommodation, including food and drink purchased there	5	8.50	15.65
Non-routine shopping	1	0.06	0.95
Other miscellaneous items	-	-	0.90
Admissions fees to attractions	-	-	0.43
Parking	-	-	0.64
Hiring equipment e.g. boats, bikes or horses	-	-	0.27

Base: All visitors – Hafren 2013 (130); All Wales 2013 (1,114)

5. Perceptions of the site

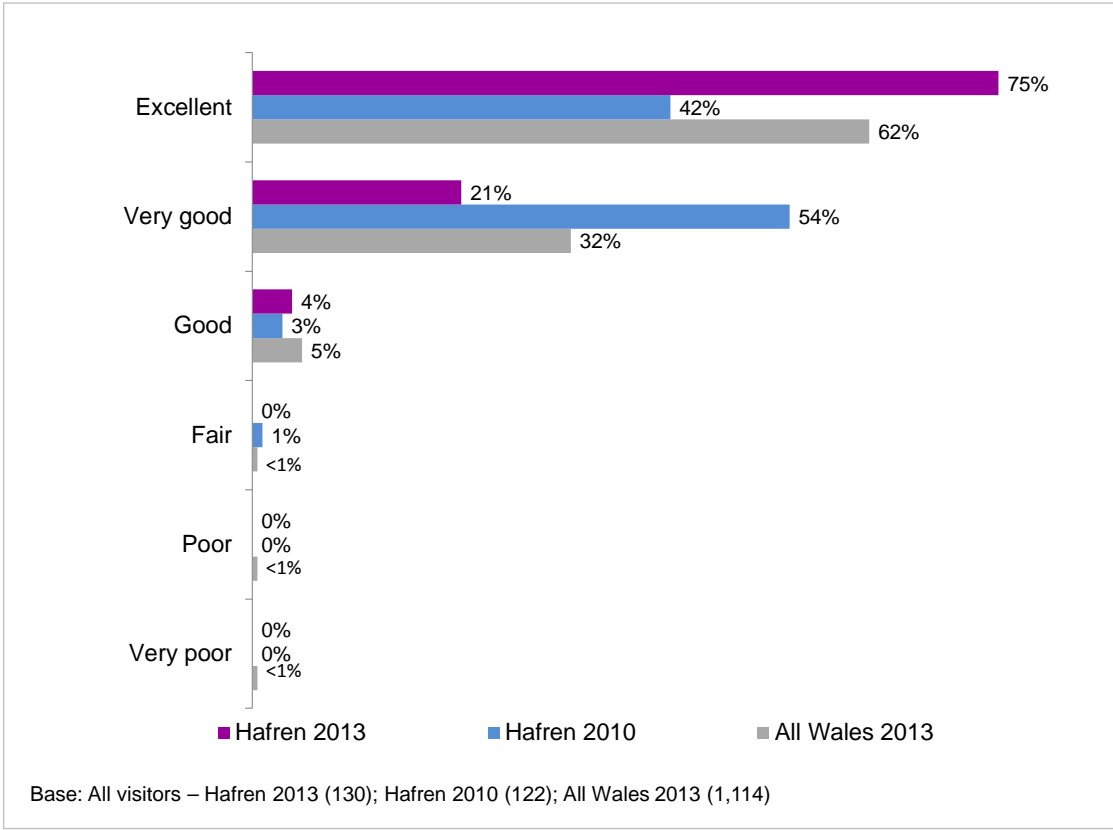
5.1 Overall rating of the site as a place to visit

Perceptions of Hafren as a place to visit were very positive. This was also the case across all the Welsh sites, and was found in the previous study conducted in 2010. In fact, nobody interviewed at Hafren gave a negative rating of the site.

Three quarters (75%) rated the site as 'excellent'. This was significantly higher than the comparative 2010 Hafren study (42%) and the all Wales average (62%).

In 2010, visitors were most likely to give the site a more modest 'very good' rating (54%) - 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

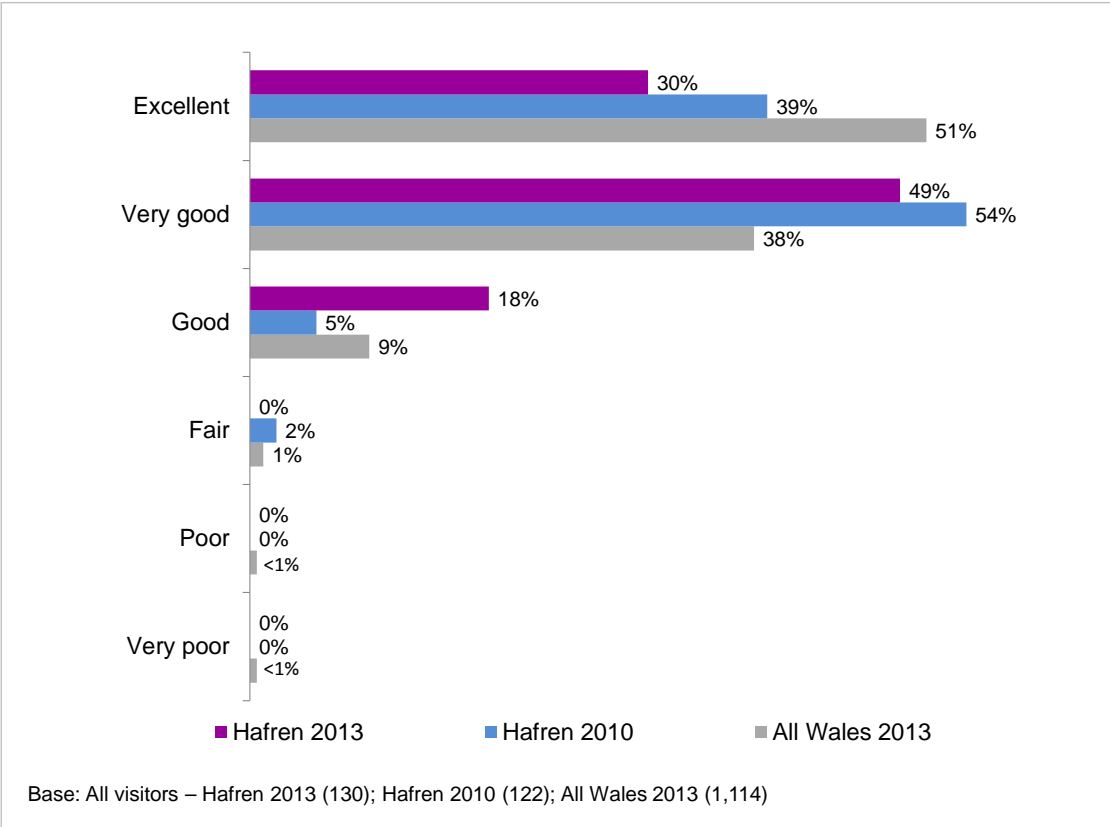
Similarly, ratings of how safe and welcoming the site was were also positive, although slightly less so at Hafren compared to the all Wales average and the previous research.

Three in ten (30%) visitors to Hafren in 2013 said that the site was ‘excellent’ in terms of how safe and welcoming it was: this was lower than both the all Wales figure (51%) and the 2010 study (39%).

A fifth (18%) gave the site a fairly modest ‘good’ rating: this was significantly higher than the proportions saying the same across all Welsh sites (9%) and in the previous study (5%).

Despite the more modest positive ratings, no-one interviewed at Hafren gave the site a poor rating for how safe and welcoming it felt - 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 below details the comments provided by 2% or more of the sample at Hafren, and shows the responses received from those visitors giving a positive rating (excellent, very good, good) for both Hafren and all Wales sites.

Hafren was considered to be a safe environment generally by a fifth of visitors (20%), while around one in six thought it was peaceful / tranquil, with beautiful views and scenery (15% and 14% respectively). A similar proportion of visitors reported that they had never had any problems at the site (16%).

Hafren was considered to have a good provision of paths / trails and tracks by one in ten visitors (10%). Other comments were made by relatively small proportions of visitors, including it being a good place for kids to run around, and being well laid out (3% for each) – see Table 8 below 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

	Hafren 2013 %	All Wales 2013 %
Safe environment generally for all people	20	18
Never had any problems	16	4
Peaceful / pleasant / tranquil / relaxing	15	11
The scenery / views / beautiful environment	14	14
Good provision of paths / trails and tracks	10	13
General positive comments	9	14
Good place for the kids to play / safe for kids	3	5
Well laid out / well organised	3	4
Good car parking	2	8
Live locally / convenient / easy to get to	2	4
Been before / familiar with it	2	3
Good quality facilities	2	6
Dog friendly	2	2
Plenty to do / has everything you want	2	2
Clean / tidy / well maintained	2	7

Base: Visitors rating the site as excellent, very good or good – Hafren 2013 (126); All Wales 2013 (1,085)

5.3 Recommending the site as a place to visit

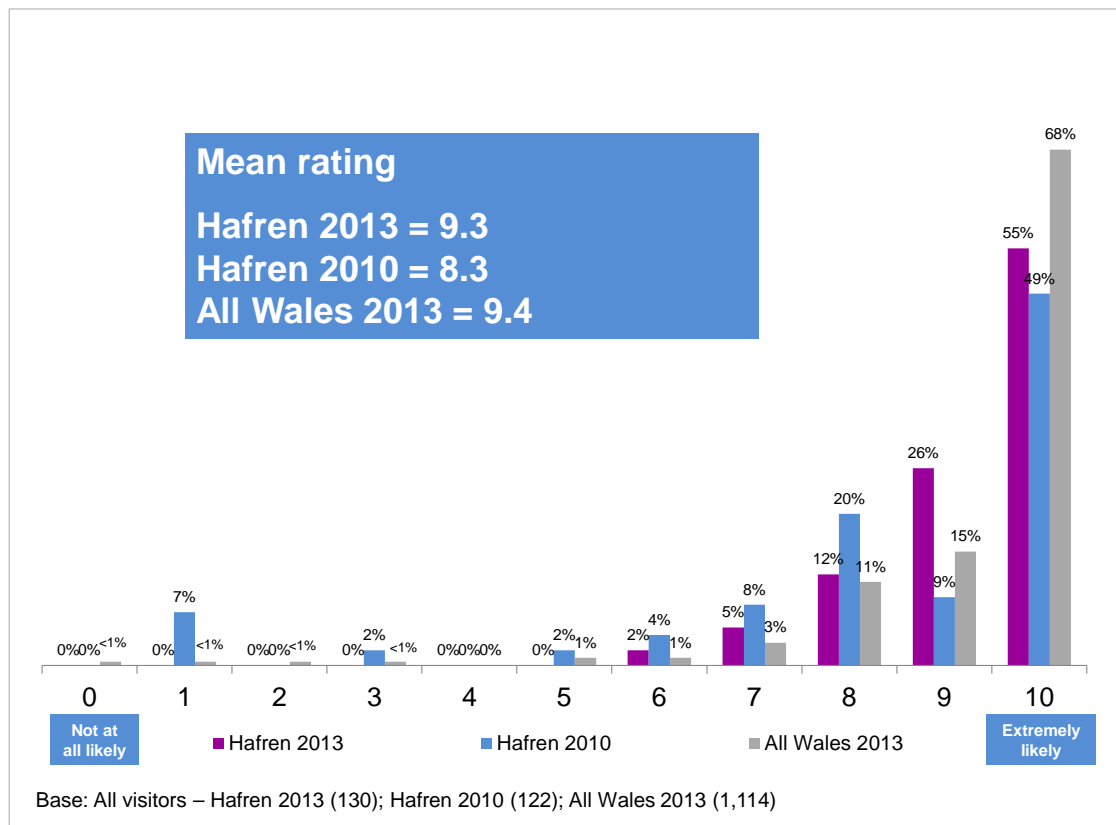
Visitors were asked whether they would be likely to recommend Hafren as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Hafren and all Wales sites in general were very positive. Only 2% gave a score of less than 7/10.

The proportion who gave a rating of 10/10 rose slightly since the 2010 study, from 49% to 55%. Moreover the proportion of visitors rating the site as a '9' also increased in 2013 from 9% to 26%. These increases are reflected in the mean scores, with Hafren 2013 standing at 9.3, compared with Hafren 2010 at 8.3.

Although the mean score for Hafren was comparable with that for all Welsh sites (9.4), the proportion giving the site a 10/10 rating was significantly lower than the all Wales average (55% vs. 68%) – see Figure 9 below.

Figure 9: Q17. Likelihood of recommending the site as a place to visit



Looking at sub-group differences:

- visitors from England were more likely to give the site a 10/10 rating (63%) compared to more local visitors from Wales (53%)
- younger visitors aged 16-34 were significantly less likely to give a 10/10 rating compared to older visitors aged 55+ (73%)
- those accompanied by young children (0-5 years) were also less likely to give a 10/10 rating (39%) compared to those who had older children in their group (50%) or those groups comprising of adults only (60%).

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 Hafren is 79, which is considerably higher (by 36 points) than the score of 43 seen in 2010, and equal to the all Wales score of 79.

5.4 Favourite things about the site

Visitors to Hafren 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).

The most mentioned favourite things about Hafren related to 'peace / tranquillity / relaxation' (69%): this was significantly higher than both the 2010 figure (52%) and the all Wales figure (51%).

The scenery / views were mentioned by just over two in five visitors (44%), as were the walks, paths and trails (41%).

One in ten visitors said that the site was clean and well looked after (13%), that there were good on-site facilities (12%) and that they liked the trees (11%).

Only a small proportion of 3% of visitors to Hafren mentioned anything in relation to exercise or keeping fit – this was lower than both the 2010 figure (16%) and the all Wales figure (15%) - 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	Hafren 2013 %	Hafren 2010 %	All Wales 2013 %
Peace / tranquillity / relaxation	69	52	51
Scenery / views / beautiful	44	65	57
Walks / paths / trails	41	53	38
Clean / well looked after	13	7	9
Good on-site facilities	12	11	9
Like forests / trees / variety of trees	11	9	14
Fresh air / being outside	9	16	16
Wildlife / bird watching	8	9	7
Been before / wanted to come again	5	7	7
Plenty / cheap / good parking	5	1	5
Cycle trails / opportunity to cycle	4	7	17
Activities for the children	4	2	6
Close to home / convenient	4	7	15
Exercise / keeping fit	3	16	15
Safe environment	3	11	8
Opportunity to spend time with family / friends	2	2	5
Ideal for dogs / dog friendly	2	-	1
Lots to see and do	2	2	3
The weather	2	-	4

Base: All visitors – Hafren 2013 (130); Hafren 2010 (122); All Wales 2013 (1,114)

Some notable differences were observed between different sub-groups of the sample when it came to what was liked about the Hafren site:

- peace / tranquillity was mentioned more frequently by older visitors aged 55+ (73%) than younger visitors (16-34 years = 61%)
- the beautiful scenery was commented on by more visitors from England (55%) than from Wales (36%)
- the walks, paths and trails were mentioned more frequently by women (50%) than by men (35%).

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. Nearly two thirds 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 figure of (47%).

The single most mentioned area for improvement was the provision of more bins: litter and recycling bins (11%) and dog poo bins (9%).

Small proportions of visitors mentioned improving the signage and maps (5%), providing a café or catering van (4%) and improving the toilets / providing showers (3%) - see Table 10 below.

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

	Hafren 2013 %	All Wales 2013 %
Nothing / general positive comments	62	47
More bins / litter bins / recycling bins	11	5
More dog poo bins	9	5
Improve signage / better signs / maps	5	7
Provide café / catering	4	5
Improve toilets / more toilets / shower facilities	3	8
More activities for children / play areas	2	2
Better weather / more sunshine	2	2
More seating	2	2
More paths / trails / tracks	2	5

Base: All visitors – Hafren 2013 (130); All Wales 2013 (1,114)

When asked if there was anything that interfered with their enjoyment of the site, virtually everyone reported that nothing had interfered with their enjoyment (96%). This was considerably higher than the all Wales figure (79%).

The poor weather, lack of litter and dog poo bins, and problems getting around the site were mentioned by 1% of the sample – see Table 11 below for more details.

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

	Hafren 2013 %	All Wales 2013 %
Nothing	96	79
Wet / windy / raining	1	2
Lack of litter bins / needs more bins	1	2
Need more dog poo bins	1	2
Problems getting around the site (e.g. paths closed, no disabled access)	1	2

Base: All visitors – Hafren 2013 (130); All Wales 2013 (1,114)

6. Site facilities

6.1 Importance of site facilities

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

It should be noted that the footfall at Hafren was particularly low during the interviewing period, and a larger than average proportion of visitors to Hafren did not report that any of the facilities listed were important to their decision to visit.

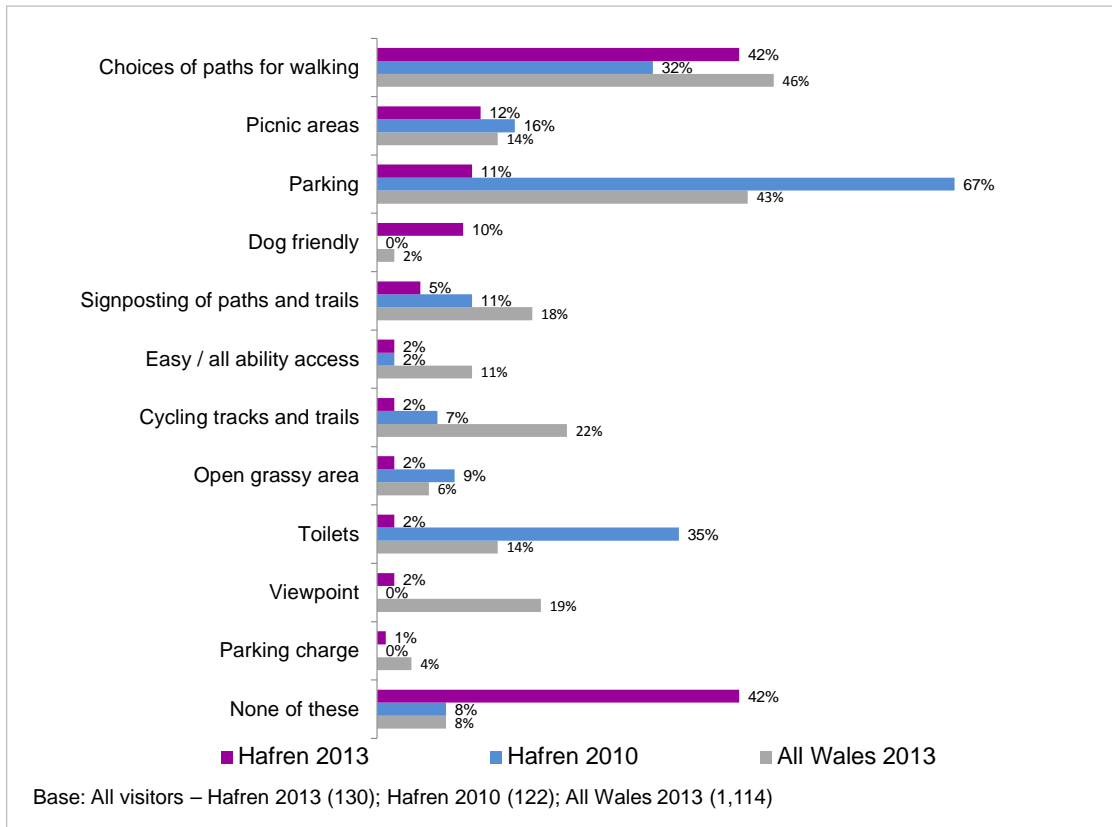
Anecdotally, interviewers working at the site at different points in time reported that they were meeting the same individuals on several occasions (who had already been interviewed), who lived locally and came fairly regularly to the forest simply to walk along the paths or walk their dog. The facilities at the site, per se, did not influence their decision to visit.

Not surprisingly, the choice of paths for walking was mentioned by the highest proportion of visitors to the site (42%): this was higher by 10% than the figure seen in 2010 (32%) but slightly lower than the all Wales average of 46%.

Being dog friendly was important to one in ten visitors (10%), as were the picnic areas (12%) and parking (11%).

Only relatively small proportions said that any of the other facilities listed were important to their decision to visit – see Figure 10 overleaf for more details.

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



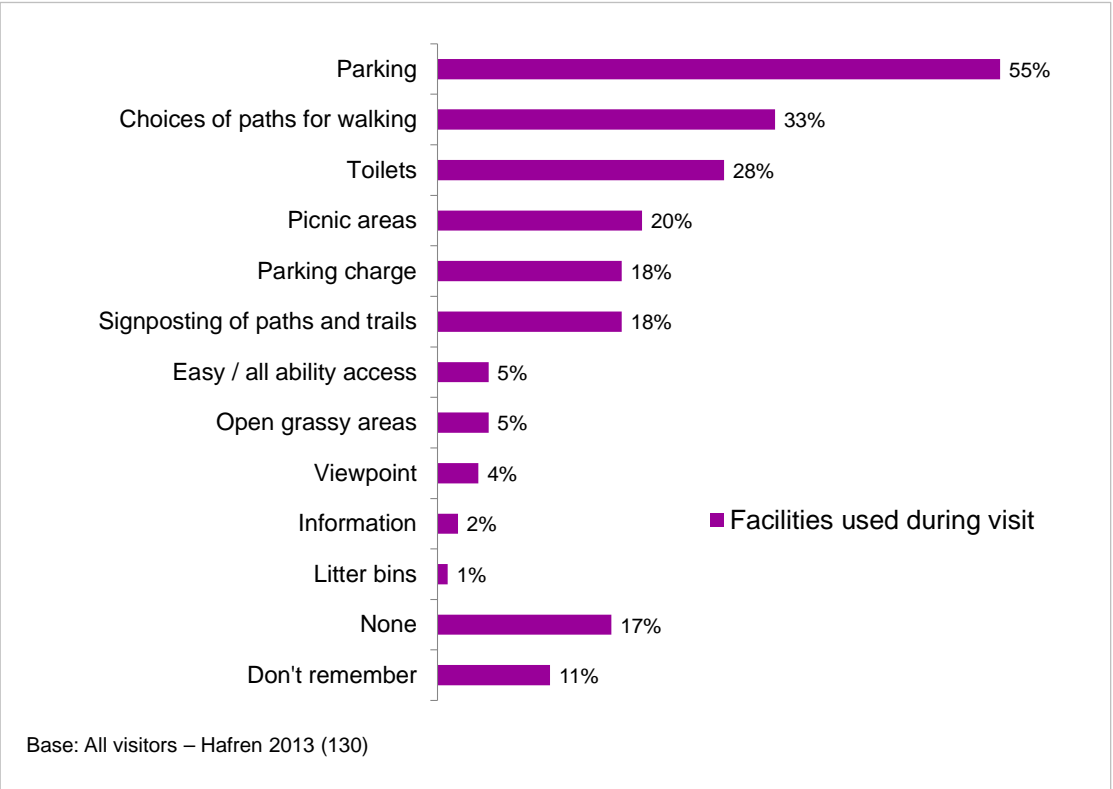
6.2 Facilities used

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

Over half of visitors used the car park (55%), while a third said that they used the choice of paths for walking (33%).

Just under three in ten used the toilets (28%), while a fifth used the picnic areas (20%), paid for parking or used the signs and maps along the pathways (18% for each) – for a full list see Figure 11 below.

Figure 11: Q15a. Facilities used at Hafren 2013



Choices of paths for walking tended to be used by older visitors aged 55+ years (42%) compared to younger visitors aged 16-34 years (22%) or 35-54 years (29%). The signposts on trails, however, were more frequently used by the younger visitors (16-34 = 28%) than the older ones (55+ = 12%).

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 Hafren have been detailed in Figure 12 below.

Ratings of all the facilities used were overwhelmingly positive with none of the visitors giving the facilities a 'poor' rating, and the vast majority giving a highly positive rating of either 'excellent' or 'very good'.

The facility that received the highest score was the parking charge. Virtually everyone (96%) rated the parking charge as 'excellent'. Similarly, 93% of those who used the parking said that this was 'excellent'.

Signposting of paths/trails, and the choices of paths for walking were considered to be 'excellent' by eight in ten of those who used them (78% and 77% respectively), while the picnic areas were rated as 'excellent' by three quarters of users (73%).

The facility receiving the lowest positive score was the toilets: 64% rated these as excellent, with 25% saying they were good or very good. However, one in ten rated these as 'fair' – this modest rating was much higher than was seen for the other facilities - see Figure 12 overleaf for more details of the ratings given for each facility.

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

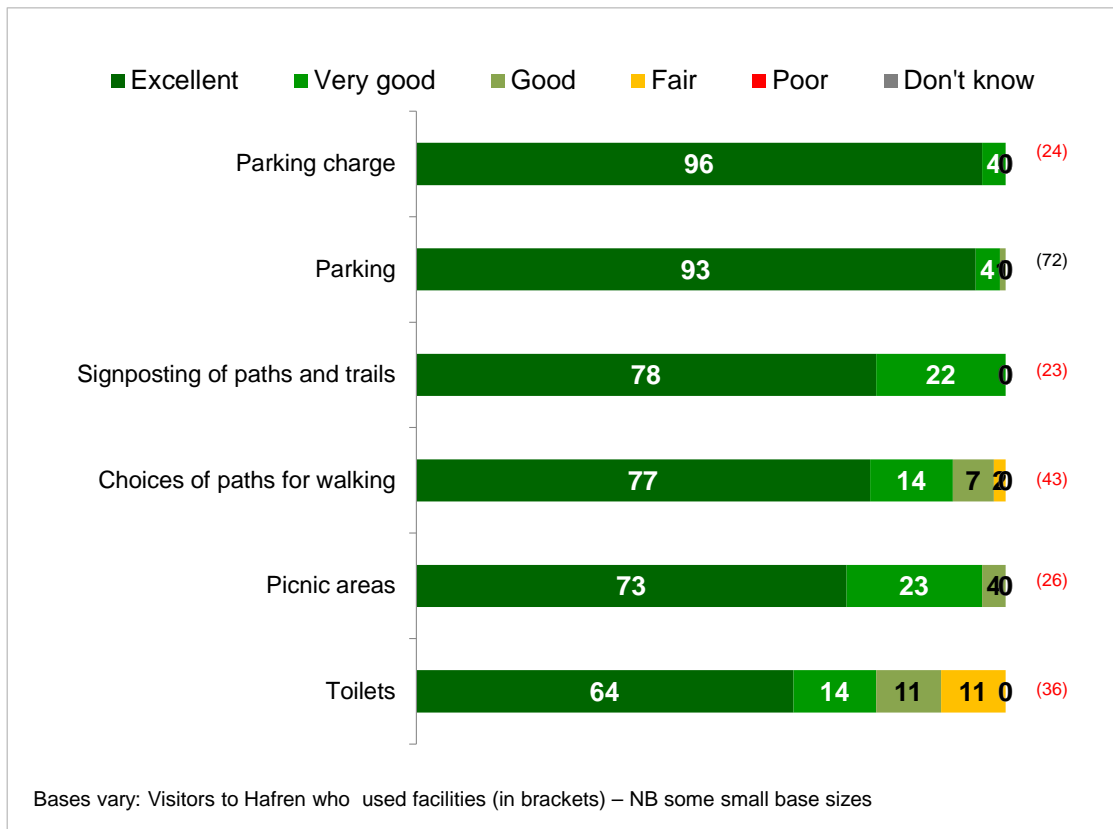


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2013 compared to 2010.

For all the facilities listed, the proportions who gave an 'excellent' rating increased markedly since the previous research, with the most significant increases seen in the proportions rating the choices of paths for walking, picnic areas and parking as 'excellent' (57%, 56% and 55% increases respectively) – see Table 12 below for more details.

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

Facilities	Hafren 2013 %	Hafren 2010 %	% change
Parking	97	42	+55
Parking charge	96	-	-
Signposting of paths and trails	89	39	+50
Choices of paths for walking	89	32	+57
Picnic areas	88	32	+56
Toilets	71	26	+45

Bases vary: visitors using each facility

7. Sources of information used to plan visit

Visitors were asked where they found out about Hafren 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.

Two fifths of first time visitors heard about Hafren via word of mouth (41%), and this was the most frequently mentioned source of information for this group of people. The proportion who mentioned word of mouth increased significantly since the 2010 Hafren study (18%) but is in line with all Wales 2013 findings (39%).

Another fifth of first time visitors came across the forest en route (20%) – this was double the proportion reporting the same in 2010 and across all Welsh sites (9% and 11% respectively).

Amongst repeat visitors, the source of information mentioned most frequently, by far, was ‘always known about it / been here before’ (71%). This proportion increased slightly since the previous Hafren study (67%), but is slightly smaller than the all Wales 2013 finding (75%) – see Table 13 for more details.

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

	First Time Visitors			Repeat Visitors		
	Hafren 2013 %	Hafren 2010 %	All Wales 2013 %	Hafren 2013 %	Hafren 2010 %	All Wales 2013 %
Word of mouth	41	18	39	18	21	19
Just passing / en route	20	9	11	8	4	3
Always known about it / been here before	10	23	13	71	67	75
Google / internet	10	9	13	-	3	2
Road signs	10	2	4	3	2	1
Book / guide book	5	-	5	-	-	1
Leaflet	5	2	4	4	3	2
Map	2	18	6	6	2	2
Accommodation provider	2	-	2	1	-	<1

Bases vary: First time vs. repeat visitors

8. Visiting other areas and attractions

Visitors to Hafren 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.

By far, the most visited attraction/town was Llandidloes (80%): this proportion increased considerable since 2010 (58%).

Around three fifths of visitors to Hafren also visited Llyn Clywedog (61%): this proportion also increased since 2010 (47%).

Other attractions/towns visited by a quarter or more of visitors were Rhayader (41%), Source of the Severn (35%) and Nant yr Arian (25%) – see Table 14 below for more details.


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

Attractions / Areas	Hafren 2013	Hafren 2010
	%	%
Llandidloes Town	80	58
Llyn Clywedog	61	47
Rhayader Town	41	41
Source of the Severn	35	45
Nant yr Arian	25	31
Gigrin Red Kite Feeding Centre	18	26
Centre for Alternative Technology	12	29
Source of the Wye	7	33
None	7	13
Don't remember	2	2

Base: All visitors – Hafren 2013 (130); Hafren 2010 (122)

Appendix I

Questionnaire

 2 Museum Place, Cardiff, CF10 3BG	<u>B01326-1</u> <u>NRW / FCE</u> <u>Quality of Visitor Experience</u> <u>FINAL questionnaire</u> HAFREN	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
 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

(18)

1
2
3
4
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

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

SHOWCARD F

Q12 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

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?

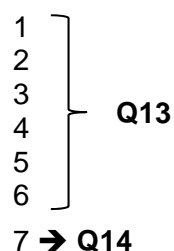
CODE ALL MENTIONED

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 Trampler - 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								

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

(210)

- 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
---	---	---	---	---	---	---	---	---	---	----

(211)

ONLY ASK Q18a IF MORE THAN ONE PERSON IN GROUP

SHOWCARD I

Q18a Thinking about the whole of the group you are with today, how much do you think the whole group are likely to spend in the local area on the following things as a result of your visit today?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE RECORD 0**

- Accommodation, including food and drink purchased there _____
- Food and drink purchased outside any accommodation _____
- Admissions fees to attractions _____
- Parking _____
- Non-routine shopping (e.g. buying souvenirs) _____
- Transport including petrol, taxis, public transport etc. _____
- Hiring equipment such as boats, bikes or horses _____
- Other miscellaneous items _____

- (212-217)
- (218-223)
- (224-229)
- (230-235)
- (236-241)
- (242-247)
- (248-253)
- (254-259)

INSTRUCTION - ONLY ASK Q18b RESPONDENT IS ALONE

SHOWCARD I

Q18b How much do you expect to spend in the local area on the following things as a result of your visit today?

**WRITE IN AMOUNT OF MONEY FOR EACH TYPE OF SPEND
IF NONE RECORD 0**

- Accommodation, including food and drink purchased there _____
- Food and drink purchased outside any accommodation _____
- Admissions fees to attractions _____
- Parking _____
- Non-routine shopping (e.g. buying souvenirs) _____
- Transport including petrol, taxis, public transport etc. _____
- Hiring equipment such as boats, bikes or horses _____
- Other miscellaneous items _____

**NOW GO TO
Q19**

- (261-266)
- (267-272)
- (273-278)
- (279-284)
- (285-290)
- (291-296)
- (297-302)
- (303-308)

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?

(350-353m)

CODE ALL MENTIONED

Llyn Clywedog

1

Llanidloes (town)

2

Source of the Severn

3

Source of the Wye

4

Nant yr Arian

5

Centre for Alternative Technology (CAT)

6

Gigrin Red Kite Feeding Centre (Rhayader)

7

Rhayader (town)

8

None of these

L

Don't know / can't remember

M

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

NO Q20 OR SHOWCARD K FOR THIS SITE!**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?

(605)

SINGLE CODE

Employee in full time job (30 hours plus a week)

1

Employee in part time job (under 30 hours per week)

2

Self-employed full or part time

3

On a government supported training programme

4

Full time education at school, college or university

5

Unemployed and available for work

6

Permanently sick / disabled

7

Wholly retired from work

8

Looking after the home

9

Other (please specify) _____

Refused

Z

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?

SINGLE CODE

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

Caribbean
 African
 Any other Black background (please specify) _____

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

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

Chinese

Other (please specify) _____

Refused

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) _____

(609)

1

2

3

4

5

E

6

7

F

8

9

A

G

B

C

D

H

J

I

Z

(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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