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Research Report

Quality of the
Visitor Experience:
Newborough 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 182 visitor interviews conducted at Newborough 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 Newborough

Newborough Forest is a small forest of mainly Corsican pine, which is planted on stabilised sand dunes on the southernmost tip of the Isle of Anglesey. To the seaward side is one of Wales' finest beaches, and to the south is an area of mobile sand dunes which are of high conservation interest.

Newborough Forest is important in terms of both recreation and conservation, and supports over 170,000 visits each year to the beach car park, as well as being used all year round by local residents. The forest is increasingly seen as a tourist destination, and has a range of facilities available for visitors, with access along the beach to the popular visitor destination of Ynys Llanddwyn (Llanddwyn Island).

In addition, red squirrels have been reintroduced into the forest as part of a larger red squirrel conservation plan.

1.3 Perceptions of the site

Perceptions of Newborough as a place to visit were very positive. This was also the case across all Welsh sites and was found in the previous study conducted in 2010. Over two thirds of visitors rated the site as 'excellent' (67%), which is higher than both the previous study conducted at Newborough in 2010 (62%), and the all Wales findings (62%). Over a quarter rated the site as 'very good' (28%) and 3% rated it as 'good'.

Similarly, ratings of how safe and welcoming Newborough was were also very positive. Approaching two thirds of the visitors gave this measure an 'excellent' rating (61%) with another 32% having rated it as 'very good'.

When asked if they would be likely to recommend Newborough as a place to visit to a friend or relative, (using a score of 0-10), scores for Newborough and all Wales sites generally were extremely positive. The average score for Newborough in 2013 was 9.5 out of 10, higher than both Newborough 2010 and all Wales (both 9.4).

1.4 Strengths of the site

Three favourite things about Newborough stood out. The most mentioned, by nearly six out of ten, was 'scenery / views / beautiful (58%)'. This was followed by 'peace / tranquillity / relaxation', mentioned by nearly half the visitors (47%), whilst 'walks / paths and trails were favourites to 45%: this latter % was higher than both the 2010 research 34% and the all Wales sites 38%.

'Forests / trees / variety of trees' were favourites to a quarter of Newborough visitors (25%), and a 'safe environment' was a favourite to a fifth of visitors (21%).

1.5 Areas for improvement

Around half of visitors to Newborough could not think of anything that would add to their enjoyment of the site, and only made positive comments (49%). There were no prevailing aspects that needed attention.

There were however calls by small minorities for:

- Improved signage and maps (7%)
- Better parking (4%)
- More picnic facilities (4%)
- Improved toilets / showers (3%)
- Provision of a café / catering (3%)
- More dog poo bins (3%).

1.6 Visitor profile

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

More than four out of ten of the visitors to Newborough were on part of a longer holiday/visit (43%). This percentage is significantly higher than both the 2010 Newborough study (27%) and the all Wales average (20%). Combined with those on visits that included an overnight stay (7%), this meant that half the visitors to Newborough (50%) were staying over for one or more nights in the area.

The gender profile amongst visitors to Newborough was predominantly female: 55% of visitors were women compared with 45% men. This was different to the all Wales profile where men were in the majority (59%).

Visitors to Newborough were spread across the various age groups, largely in line with the all Wales profile. However, there was a slight bias towards older people amongst the Newborough visitors, with 39% aged 55+ against an all Wales figure of 33%.

Newborough visitors tended more towards the ABC1 socio-economic groups (75%) than the all Wales average (70%).

Over half of the Newborough visitors worked full time (56%), and nearly a third (31%) had children in the household (similar to the all Wales figures of 60% and 30% respectively).

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 Newborough, interviewing took place between 7th August and 19th October 2013, and a total of 182 interviews were conducted.

2.3 Report

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

The gender profile amongst visitors to Newborough was predominantly female: 55% of visitors were women compared with 45% men. This was different to the all Wales profile where men were in the majority (59%).

Visitors to Newborough were spread across the various age groups, largely in line with the all Wales profile. However, there was a slight bias towards older people amongst the Newborough visitors, with 39% aged 55+ against an all Wales figure of 33%.

The socio-economic profile of visitors to Newborough was similar to the all Wales profile although slightly skewed towards the ABC1 groups (professionals and middle managers), who accounted for 75% of the Newborough visitors compared to an all Wales proportion of 70%.

Over half of the Newborough visitors worked full time (56%), and nearly a third (31%) had children in the household (similar to the all Wales figures of 60% and 30% respectively).

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

Nearly three in ten visitors to Newborough spoke Welsh (28%): 15% fluently and 13% non-fluently. This is higher than the all Wales average of 20% Welsh speakers (8% fluent, 12% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2013

		Newborough %	All Wales %
Gender	Male	45	59
	Female	55	41
Age	16 - 24	5	6
	25 - 34	14	15
	35 – 44	21	25
	45 – 54	20	21
	55 – 64	23	18
	65+	16	15
Social class	AB	43	40
	C1	32	30
Working status	C2	17	19
	DE	7	9
	Refused	1	2
	Full-time employee (30+ hours per week)	56	60
	Part-time employee (<30 hours per week)	12	8
	Self-employed	6	6
	Full-time education	2	2
	Unemployed	1	1
	Permanently sick / disabled	1	1
Limiting illness	Retired	19	19
	Looking after home	3	2
	Other	1	<1
	Refused	-	1
	Yes – limited a lot	4	2
	Yes – limited a little	2	3
	No	95	94
	Refused	-	2
Children in household	Yes	31	30
	No	69	69
	Refused		1
Ethnicity	White – British / Welsh / Irish	97	96
	White – Other	2	2
	Black / Asian / Mixed	1	1
	Refused	-	1
Welsh speaker	Yes	28	20
	No	72	80

Base: All visitors – Newborough (182); All Wales (1,114)

3.2 Group profile

3.2.1 Size of group

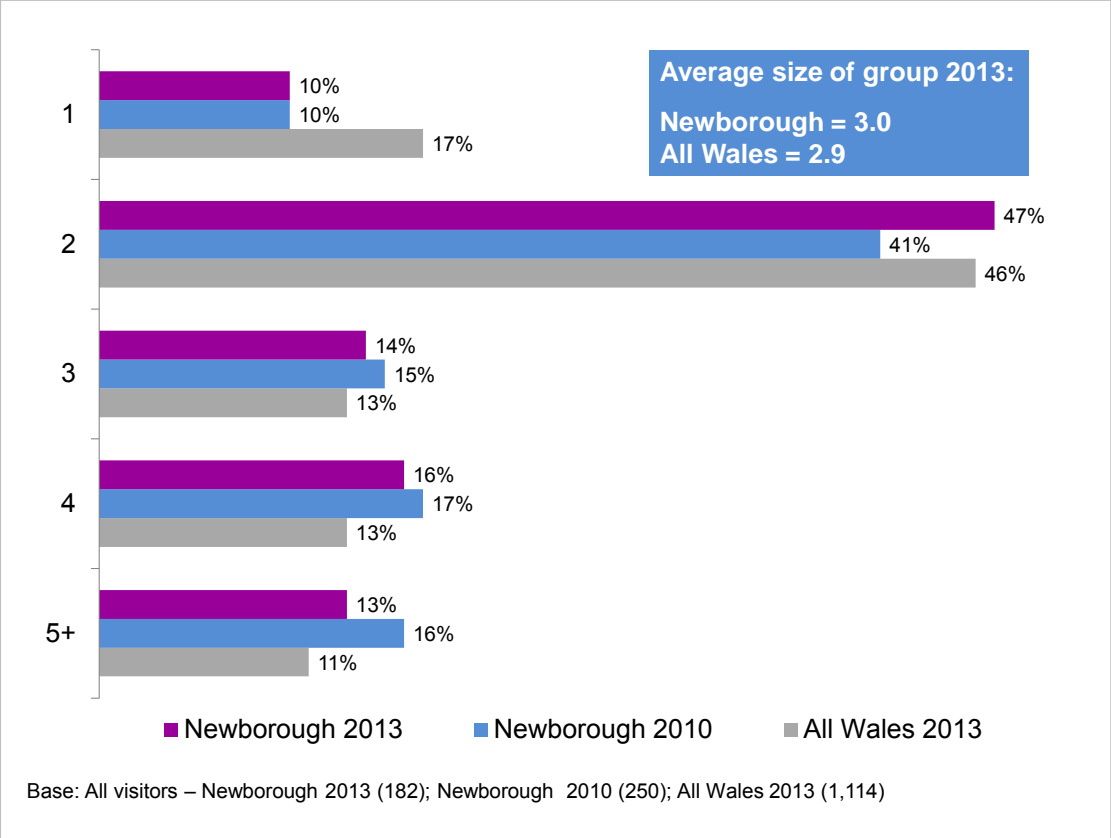
Group sizes were slightly larger at Newborough (averaging 3.0 people), compared to the all Wales sample (which averaged 2.9 people).

The largest group by some margin, consisting of nearly a half of Newborough visitors (47%), was made up of two people. This was higher than the previous Newborough research in 2010 (40%), and a little above the all Wales average (46%).

Fewer people visited Newborough on their own (10%), than the all Wales average (17%), although this remains unchanged from the 2010 figure.

The groups with three or more people in were similar in proportion, with groups of three accounting for 14%, groups of four 16% and groups of five or more 13% - see Figure 1 below.

Figure 1: Q1. Total size of the group

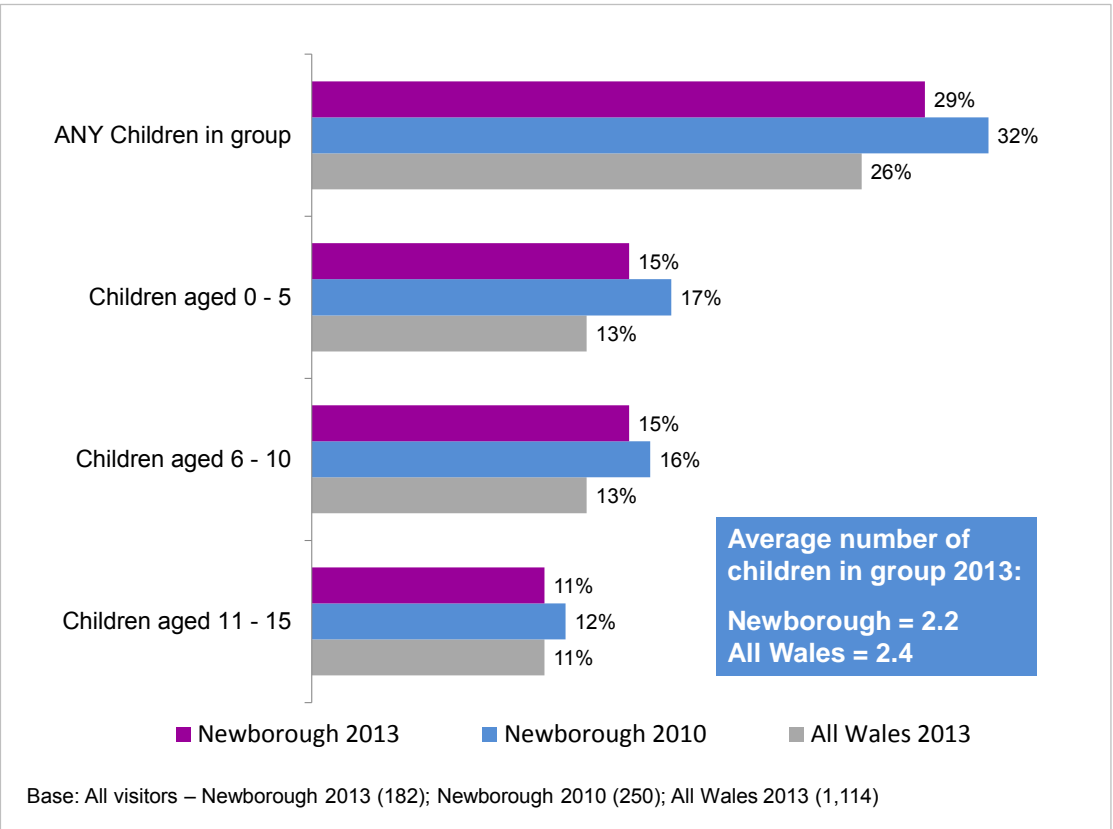


3.2.2 Composition of group

Around three in ten of the groups who visited Newborough contained children (29%). This was higher than the all Wales figure (26%) but lower than the comparative Newborough study conducted in 2010 (32%). The average number of children per group visiting Newborough in 2013 was lower than the all Wales average (mean of 2.2 children at Newborough compared with 2.4 overall).

The age profile of children visiting Newborough was consistent with the findings from the previous research conducted in 2010 – see Figure 2 below.

Figure 2: Q1. Composition of group



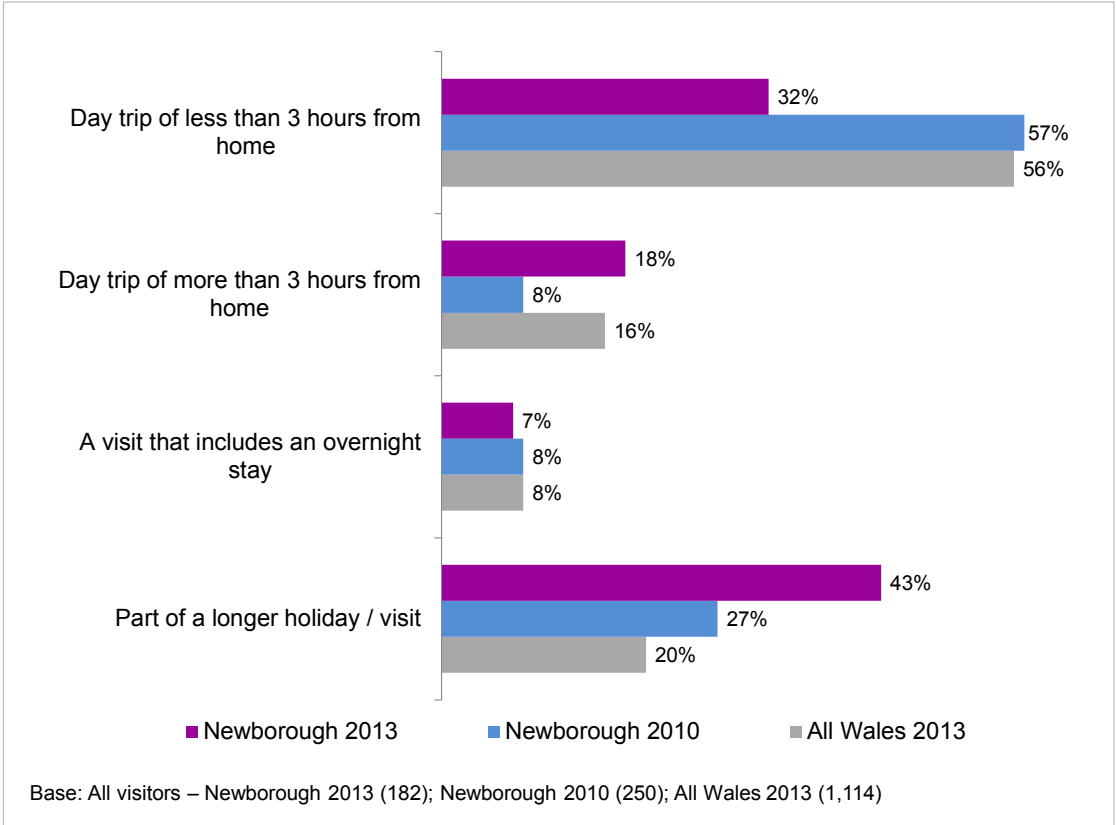
4. Profile of visit

4.1 Type of visit

More than four out of ten of the visitors to Newborough were on part of a longer holiday / visit (43%). This percentage is significantly higher than both the 2010 Newborough study (27%) and the all Wales average (20%). Combined with those on visits that included an overnight stay (7%), this meant that half the visitors to Newborough (50%) were staying over for one or more nights in the area.

By contrast, less than a third of the 2013 visitors to Newborough (32%) were on a day trip of less than three hours from home. This compares with 57% from the 2010 Newborough study and the all Wales average of 56% - 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.

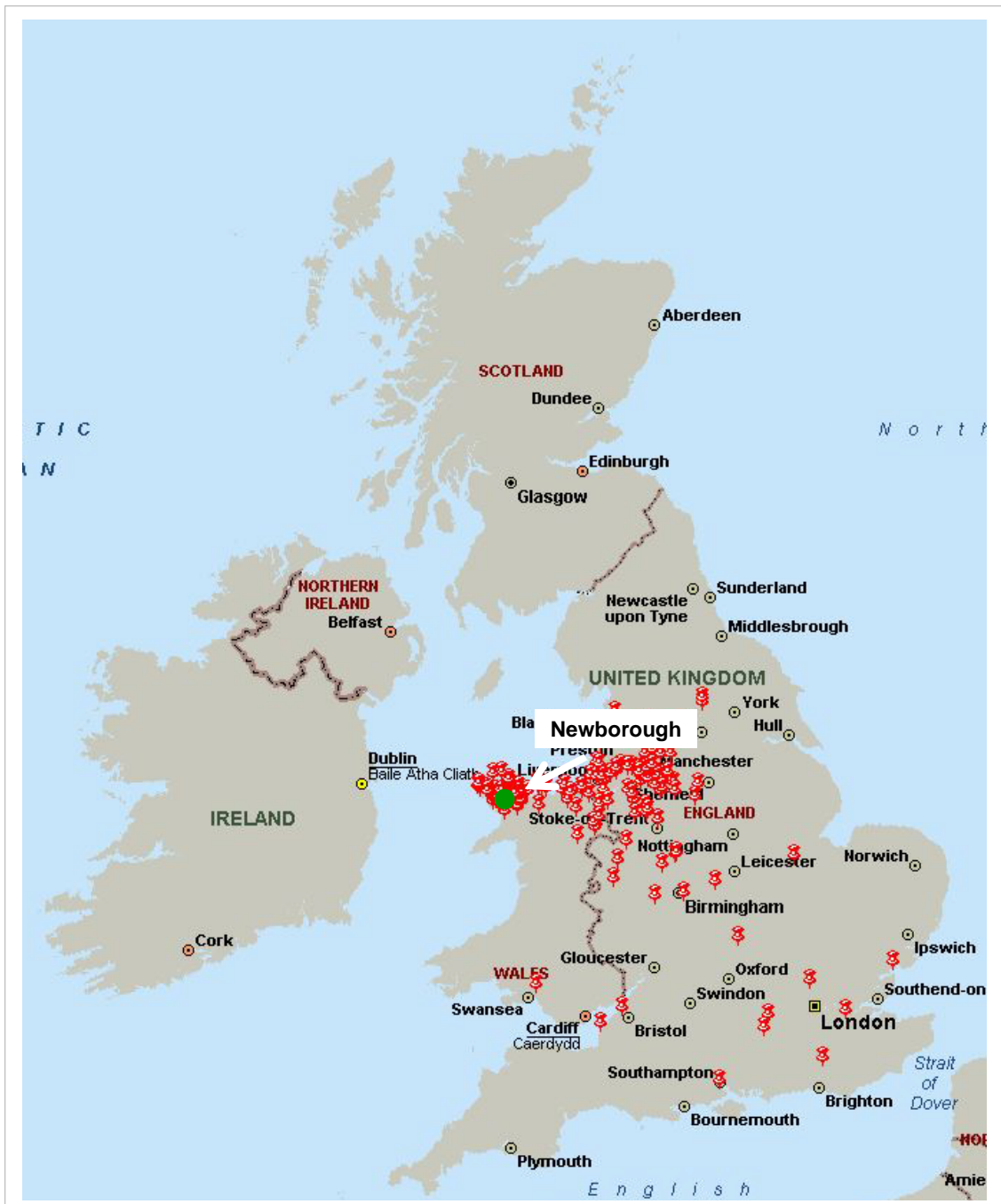
Virtually half the visitors to Newborough came from England (49%) and the other half from North Wales (47%). The North Wales percentage was significantly higher than the all Wales figure (23%) - Table 3 below and Figure 4 overleaf provide more details.

Table 3: Visitor origin 2013

		Newborough	All Wales
		%	%
Home region	North Wales	47	23
	Mid / West Wales	-	14
	South West Wales	1	11
	Valleys	-	2
	South East Wales	-	7
	Outside of Wales	52	43
Home nation	Wales	48	57
	England	49	40
	Rest of UK	-	<1
	Abroad	2	1
	Refused	1	2

Base: All visitors – Newborough (182); All Wales (1,114)

Figure 4: Map of visitor origin for Newborough



4.3 Frequency of visits

4.3.1 First-time visitors

In 2013 only 30% of visitors to Newborough were first time visitors, although this was higher than both the comparative figure from 2010 of 19%, and the all Wales average of 25% who said they had never visited their respective forest sites before.

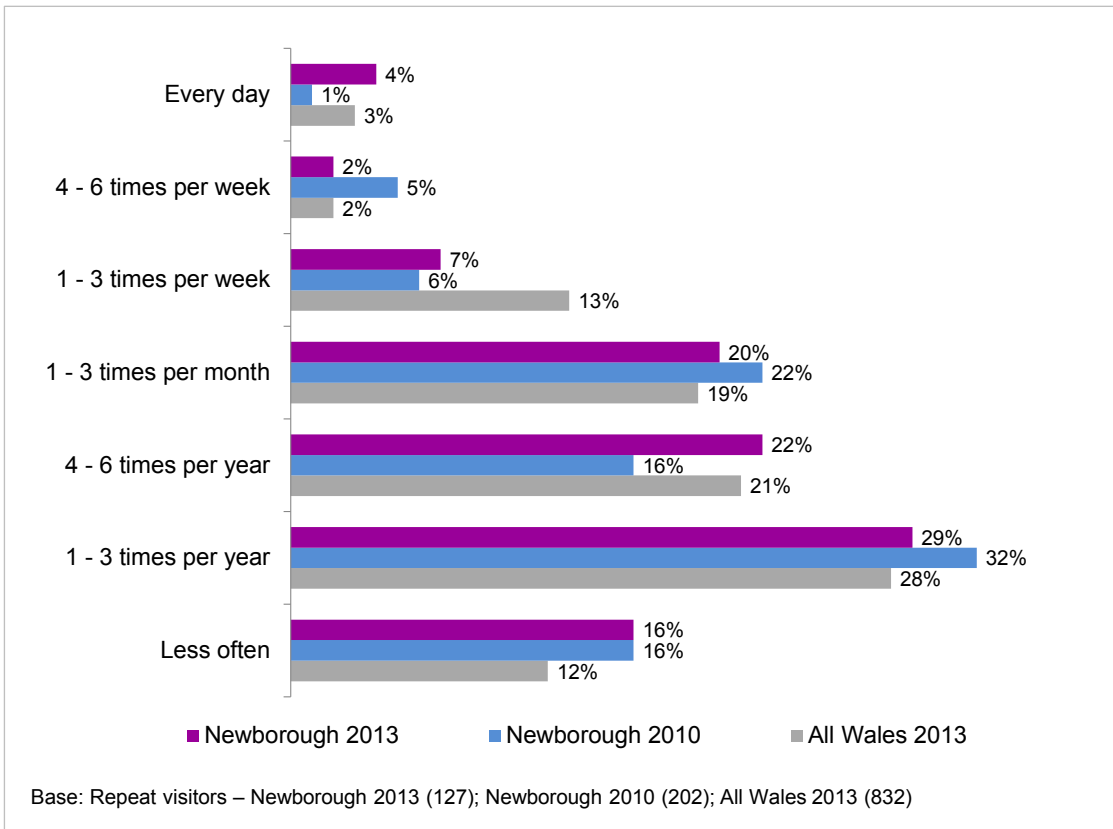
4.3.2 Repeat visitors

Focussing on repeat visitors (70% of the sample), it can be seen that the largest group contains those who have visited Newborough between 1 and 3 times a year (29%). Over a fifth said they had visited between 4 and 6 times a year (22%), with a similar percentage visiting 1 to 3 times a month (20%).

Those who visited Newborough more frequently (1 to 3 times a week) were a significantly smaller proportion than the all Wales average (7% vs. 13%).

Aside from the 4-6 times a year group (2013 - 22% vs. 2010 - 16%) the frequency of visits for repeat visitors to Newborough was consistent with the previous research conducted in 2010 – see Figure 5 below.

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



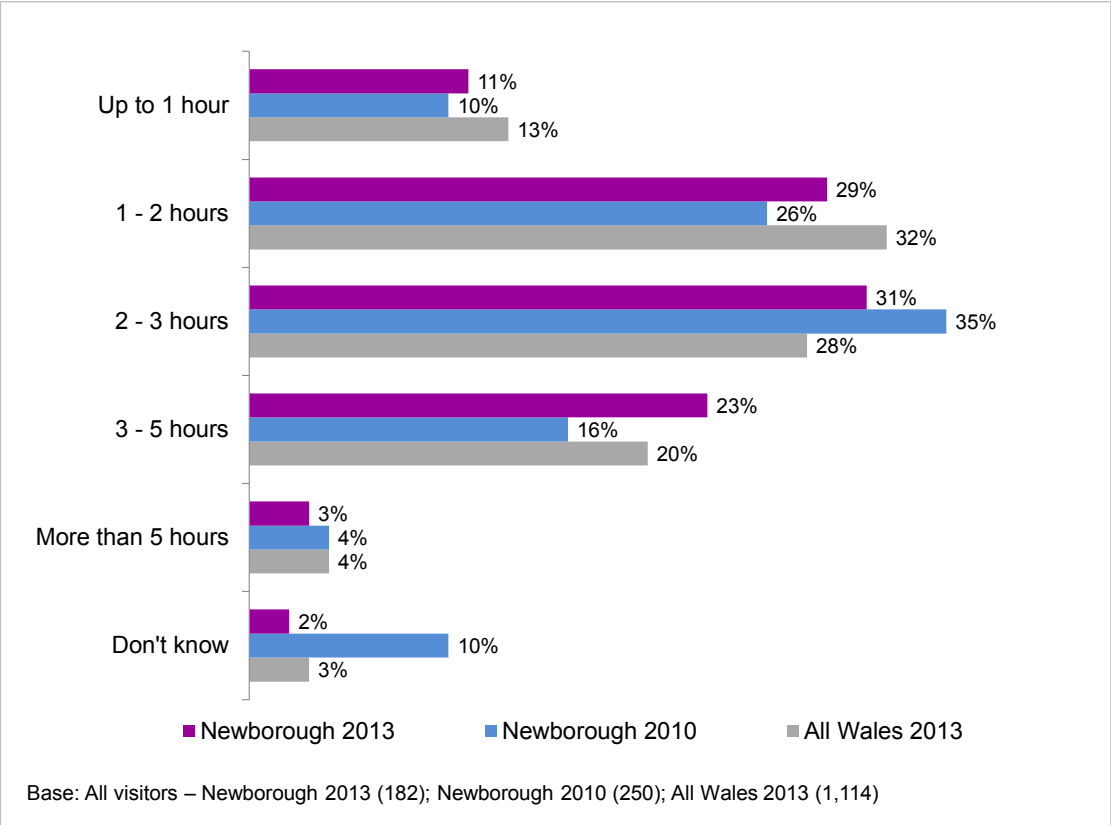
4.4 Length of visit

Compared to previous years, visitors to Newborough were staying only marginally longer at the site. In 2010, the average length of visit was 2 hours and 23 minutes, whilst in 2013 it was 2 hours and 28 minutes. The average length of visit across all sites in Wales was 2 hours and 27 minutes.

Most visitors stayed at Newborough for between 1 and 5 hours (83%).

Results for 2013 are largely in line with 2010. In the 3-5 hour stay groups in 2013, however, the figure was somewhat higher (23%) compared with 2010 (16%) – see Figure 6 below.

Figure 6: Q6. Approximate length of time spent at the site during visit



4.5 Activities undertaken

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

Table 4 shows the combined figures for the following:

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

By far the most popular activity at Newborough was walking generally (81%): this was higher than the all Wales average of 73%. Dog walking in particular (43%) was above the all Wales figure of 30%.

Other popular activities at Newborough in 2013 included admiring the views (27%), and having a picnic or barbeque (20%).

Cycling was only a minority activity at Newborough (10%), compared with an all Wales figure of 22% - see Table 4 overleaf.

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

	Newborough 2013 %	Newborough 2010 %	All Wales 2013 %
Cycling on forest roads, tracks or trails	8	2	19
Cycling off trails or tracks	4	3	8
TOTAL CYCLING	10	5	22
Walking on a sign-posted trail	48	55	48
Walking but not following sign-posts	48	40	22
Dog walking	43	32	30
TOTAL WALKING	81	87	73
Admiring the views	27	25	22
Picnic or barbeque	20	20	15
Photography	11	20	8
Bird watching	7	16	4
Visiting the beach	6	9	1
Running / jogging	5	-	3
Nature / natural history visit	3	6	3
Horse riding / pony trekking	3	-	<1
Seeing something in the forest	3	4	3
Organised event / trip	3	9	1
Educational visit	2	-	1
Go swimming	2	-	<1

Base: All visitors – Newborough 2013 (182); Newborough 2010 (250); All Wales 2013 (1,114)

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

Dog walking was more popular amongst females (48%) than males (32%), and amongst the 35-54 years' age group (52%) compared to the 16-34's (28%).

4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking cycling activities (14), this has not been commented on.

Overall, visits to Newborough lasted 2 hours and 28 minutes on average. Those walking averaged 2 hours and 1 minute (a 10 minute increase on the Newborough 2010 walking average) – see Table 5 below.

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

	Total duration of visit		Time spent on any walking	
	2013	2010	2013	2010
Up to 30 minutes	2	0	10	2
31 – 60 minutes	9	10	16	17
1 – 2 hours	29	26	30	39
2 – 3 hours	31	35	33	27
3 – 5 hours	23	16	17	6
5+ hours	3	4	1	1
Don't know	2	10	3	8
AVERAGE	2 hrs 28 mins	2 hrs 23 mins	2 hrs 1 min	1 hr 51 mins

Base: all visitors (182); respondents who walked (145)

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

Visitors to Newborough 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 Newborough in 2010 was not available.

The vast majority of visitors to Newborough claimed that they would spend up to £5 in the area as a result of their trip (80%), with a further 7% planning to spend £6 - £10.

The average spend in the area as a result of visiting Newborough was £9.66, higher 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

	Newborough 2013 %	All Wales 2013 %
£0 - £5	80	75
£6 - £10	7	12
£11 - £20	3	6
£21 - £50	5	3
£51+	5	3
AVERAGE	£9.66	£7.23

Base: All visitors – Newborough 2013 (182); All Wales 2013 (1,114)

When looking at individual types of spending, the item that the highest proportion of visitors to Newborough were likely to spend anything on was food and drink (purchased away from any accommodation), with three out of five planning to spend on it (60%). The average spend on food and drink was £19.62, more than double the all Wales average of £9.22.

Another major area of spend was parking, with two fifths of visitors (40%) likely to spend £1.31 on this item. This was over twice the all Wales average spend on parking of £0.64.

Two other significant areas of spend were transport, where a third of visitors (33%) were likely to spend an average of £12.43 (nearly twice the all Wales average of £6.83) and admission fees to attractions, where more than a fifth of visitors (23%) said they'd spend an average of £2.50 (considerably higher than the all Wales average of £0.43).

Nearly one in five visitors were also likely to spend on accommodation (17%). The planned average spend on accommodation at £32.83 was more than double the all Wales average of £15.65 – see Table 7 overleaf.

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

	Proportion of visitors to <u>Newborough</u> spending anything on this item %	Average £ Newborough 2013	Average £ All Wales 2013
Food and drink purchased outside any accommodation	60	19.62	9.22
Parking	40	1.31	0.64
Transport including petrol, taxis, public transport	33	12.43	6.83
Admissions fees to attractions	23	2.50	0.43
Accommodation, including food and drink purchased there	17	32.83	15.65
Non-routine shopping	7	3.23	0.95
Other miscellaneous items	1	0.04	0.90
Hiring equipment e.g. boats, bikes or horses	1	0.13	0.27

Base: All visitors – Newborough 2013 (182); All Wales 2013 (1,114)

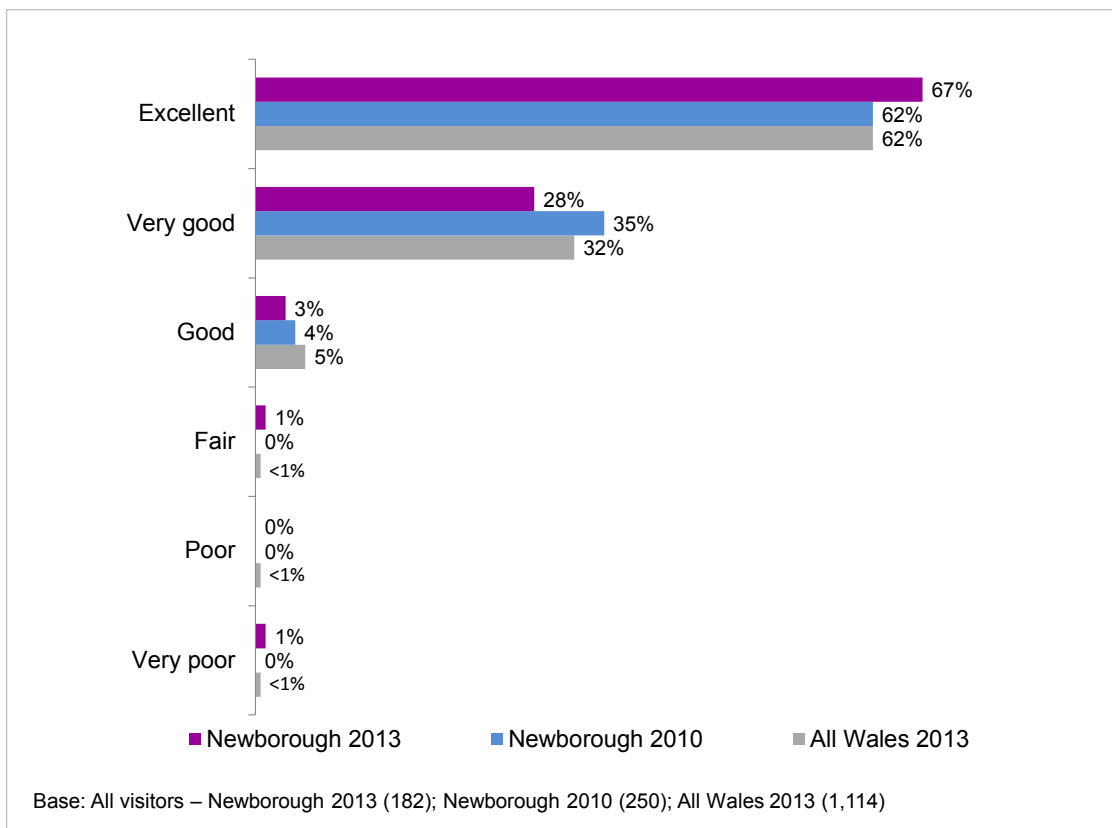
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Newborough as a place to visit were very positive. This was also the case across all Welsh sites and was found in the previous study conducted in 2010.

Over two thirds of visitors rated the site as 'excellent' (67%), which is higher than both the previous study conducted at Newborough in 2010 (62%) and the all Wales findings (62%). Over a quarter rated the site as 'very good' (28%) and 3% rated it as 'good' – see Figure 7 below.

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



Women were more likely to give the site an 'excellent' score (72%), than men (49%).

Adults with children were more likely to give the site an 'excellent' score (75%) than adults without children (64%).

The highest 'excellent' score by age group was 35-54 years (75%) while the lowest was the 55+ group (61%).

5.2 Overall rating of the site as safe and welcoming

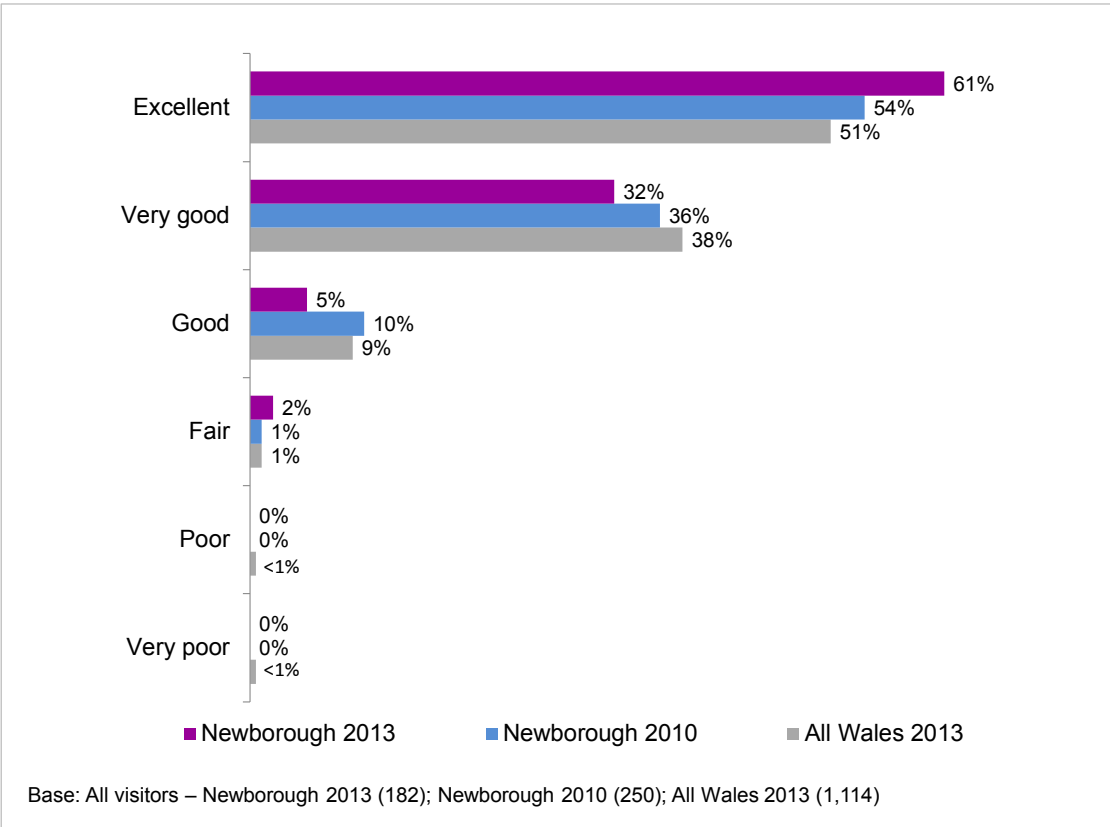
Similarly, ratings of how safe and welcoming Newborough was were also very positive. This was also the case across all Welsh sites and was found in the previous study in 2010. Nobody interviewed at Newborough gave a negative rating of the site in terms of it being safe and welcoming.

Approaching two thirds of the visitors gave this measure an ‘excellent’ rating (61%), compared to 54% in 2010 and 51% across all Welsh sites.

Another 32% gave a ‘very good’ rating for how safe and welcoming Newborough felt, compared to 36% in 2010 and 38% across all Welsh sites.

A small proportion of 5% gave a ‘good’ rating, and just 2% rated Newborough as ‘fair’ – see Figure 8 below.

Figure 8: Q12. Rating of the site in terms of how safe and welcoming it feels



Visitors with children were more likely to give an ‘excellent’ rating on the safety of the site (68%) compared to those without children (58%). In addition, younger visitors aged 35-54 years were more likely to give an ‘excellent’ rating (68%) compared to older visitors aged 55+ years (56%).

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 Newborough, and shows the responses received from those visitors giving a positive rating (excellent, very good, good) for both Newborough and all Welsh sites.

Around one in five (19%) of the visitors to Newborough commented that it was a safe environment generally for all people.

Good car parking was mentioned by 16%, and 15% thought Newborough was well signposted with good maps and information boards.

Good quality facilities were mentioned by 12%, whilst aspects of the scenery / tranquillity and good tracks / trails were each mentioned by 11% of visitors – see Table 8 overleaf for more details on the comments provided.

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

	Newborough 2013 %	All Wales 2013 %
Safe environment generally for all people	19	18
Good car parking	16	8
Well signposted / good maps / info boards	15	9
General positive comments	14	14
Good quality facilities	12	6
The scenery / views / beautiful environment	11	14
Peaceful / pleasant / tranquil / relaxing	11	11
Good provision of paths / trails and tracks	11	13
Clean / tidy / well maintained	10	6
Well laid out / well organised	8	4
Good place for the kids to play / safe for kids	8	5
Good toilets / plenty of toilets	4	2
Dog friendly	4	2
Good café / catering	4	1
Fresh air / open space	4	2
Plenty to do / has everything you want	4	2
Live locally / convenient / easy to get to	3	4
People are friendly / no jobs	2	3
Plenty of other people around	2	2
Away from roads / no cars / cars drive slowly	2	1
Been before / familiar with it	2	3
Never had any problems	2	4
Not too crowded / not too busy	2	4
Nice / lovely weather	2	1

Base: Visitors rating the site as excellent, very good or good – Newborough 2013 (178); All Wales 2013 (1,085)

5.3 Recommending the site as a place to visit

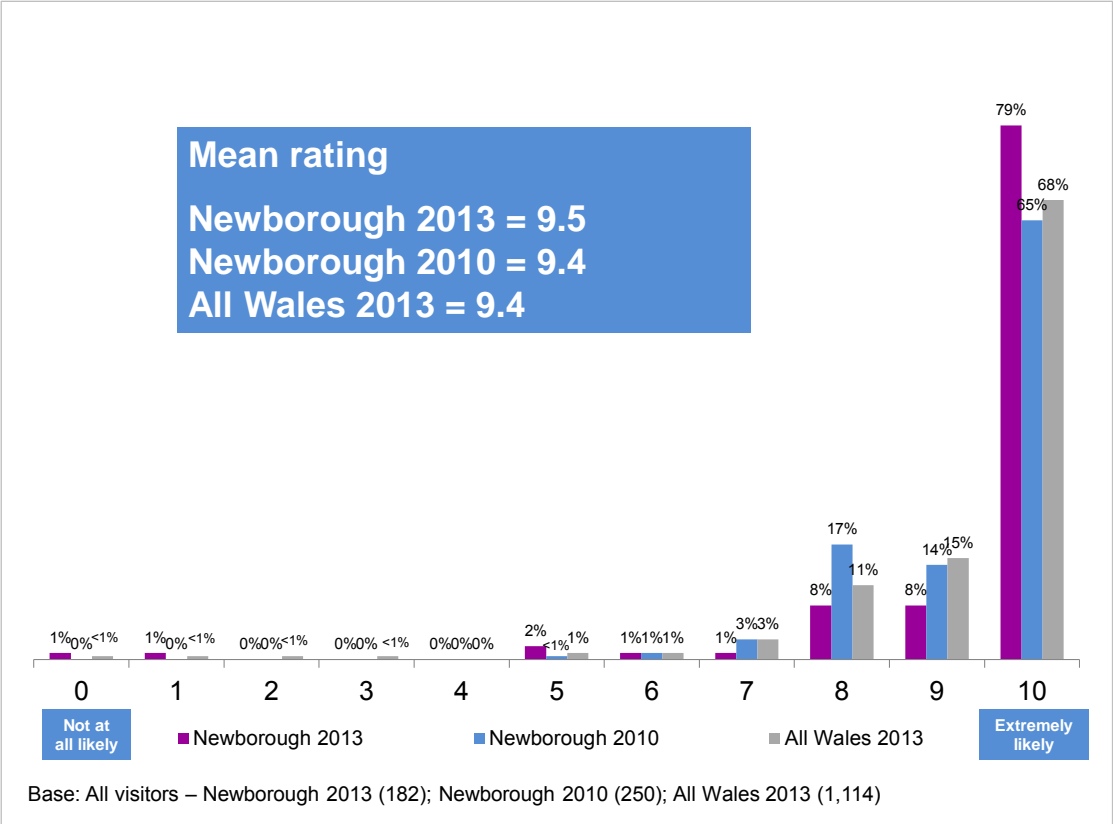
Visitors were asked whether they would be likely to recommend Newborough as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Newborough and all Wales sites generally were extremely positive. Only 6% gave a rating of less than 8/10.

Four fifths (79%) gave a rating of 10, which was higher than both the previous Newborough study in 2010 (65%) and the all Wales score (68%).

This was reflected in the mean scores, with Newborough 2013 standing at 9.5 compared with Newborough 2010 at 9.4 and all Wales at 9.4 – see Figure 9 below.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Newborough is 83, which is slightly higher than the score of 79 seen in 2010, and higher than the all Wales score of 79.

5.4 Favourite things about the site

Visitors to Newborough were asked what they liked most about the site. The question was unprompted and visitors could mention more than one aspect of the site. The comments given by 2% or more of the sample are outlined in Table 9 below (compared to the previous research and the all Wales average).

Three favourite things about Newborough stood out. The most mentioned (by nearly six out of ten) was 'scenery / views / beautiful' (58%). This was followed by 'peace / tranquillity / relaxation', mentioned by nearly half the visitors (47%), whilst 'walks / paths and trails' were favourites to 45% - this latter percentage was higher than both the 2010 research (34%) and all Wales sites (38%).

'Forests / trees / variety of trees' were favourites to a quarter of Newborough visitors (25%): a higher proportion than in the previous research (15%) and also higher than across the all Wales sites (14%).

A 'safe environment' was also a favourite thing about the site: at 21% this again was higher than the previous research (11%) and the all Wales figure (8%) – 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	Newborough	Newborough	All Wales
	2013 %	2010 %	2013 %
Scenery / views / beautiful	58	61	57
Peace / tranquillity / relaxation	47	48	51
Walks / paths / trails	45	34	38
Like forests / trees / variety of trees	25	15	14
Safe environment	21	11	8
Fresh air / being outside	20	25	16
Good on-site facilities	18	12	9
Clean / well looked after	16	19	9
Beach / coastline	14	6	10
Wildlife / bird watching	14	20	7
The weather	12	-	4
Been before / wanted to come again	12	10	7
Lots to see and do	11	10	3
Exercise / keeping fit	10	12	15
Close to home / convenient	9	9	15
Cycle trails / opportunity to cycle	8	6	17
Opportunity to spend time with family / friends	7	7	5
Activities for the children	5	4	6
Cost / value for money	4	8	3
Plenty / cheap / good parking	3	4	5
Open space / plenty of space	3	-	1
Café / restaurant	2	-	1
Not too crowded / not too many people	1	-	1

Base: All visitors – Newborough 2013 (182); Newborough 2010 (250); All Wales 2013 (1,114)

There were some differences observed between different sub-groups of the sample:

- The peace and tranquillity of the site was mentioned by a higher proportion of people belonging to the C2DE social groups (55%) than those belonging to the ABC1 social groups (45%).
- Women were more likely to mention the scenery and views (61%) than men (54%)
- Those aged 16-34 years were less likely to mention the scenery and views than any other age group (39%)
- Walks, paths and trails were favourites to 49% of men compared with 42% of women.

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. Around half the visitors to Newborough could not think of anything that would add to their enjoyment and only made positive comments (49%). This was similar to the all Wales average of 47%.

Only one enhancement was mentioned by 5% or more of the visitors to Newborough: this referred to having improved signage and maps (7%), the same as the all Wales figure.

While other improvements were mentioned by very small proportions, there were several suggestions made, and Table 10 overleaf outlines the comments that were made by 2% or more.

Improvements to facilities, such as the toilets (3%), café, and play areas (2% for each) were mentioned, while others suggested that the walking and cycling paths could be better maintained or extended (2% for each).

There were conflicting opinions on access for dogs, with equal proportions calling for a restriction on access for dogs versus more access for dogs (2% for each) – see Table 10 for more details.

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

	Newborough 2013 %	All Wales 2013 %
Nothing / general positive comments	49	47
Improve signage / better signs / maps	7	7
Better parking (easier, cheaper, more, free)	4	1
More picnic areas / BBQ / picnic tables	4	2
Improve toilets / more toilets / shower facilities	3	8
Better weather / more sunshine	3	2
Provide café / catering	3	5
More dog poo bins	3	5
Improve maintenance of paths / trails / better surfacing	2	3
More information on wildlife / vegetation	2	1
More bins / litter bins / recycling bins	2	5
Better access / make more accessible	2	1
Longer trails / more challenging trails, paths and cycle routes	2	1
More activities for the children / more play areas	2	2
Improve café / catering in general	2	1
Restrict access for dogs	2	1
More access for dogs	2	<1
Bike hire	2	<1

Base: All visitors – Newborough 2013 (182); All Wales 2013 (1,114)

When asked if there was anything that interfered with their enjoyment of the site, nearly three quarters of visitors to Newborough reported that nothing had interfered with their enjoyment (71%). Although this was lower than both the 2010 study (81%) and the all Wales compilation (79%), the comments made were mentioned by very small proportions.

Dog mess on paths and in play areas and a lack of working toilets were both mentioned by 4%, and car park problems by 3% - Table 11 below details those comments made by 2% of the sample or more.

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

	Newborough 2013 %	Newborough 2010 %	All Wales 2013 %
Nothing	71	81	79
Dog mess on paths / in play areas	4	8	2
Toilets – not enough / closed / out of order	4	-	
Problems with car park (machines, limited spaces etc.)	3	-	1
Signs unclear / need better signs / more maps	2	1	3
Dogs off leads / let loose	2	7	
Lack of litter bins / needs more bins	2	5	2
Too many cyclists / cyclists cutting-up walkers	2	-	
Too busy	2	-	
Need more dog poo bins	2	-	2

Base: All visitors – Newborough 2013 (182); Newborough 2010 (250); All Wales 2013 (1,114)

6. Site facilities

6.1 Importance of site facilities

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

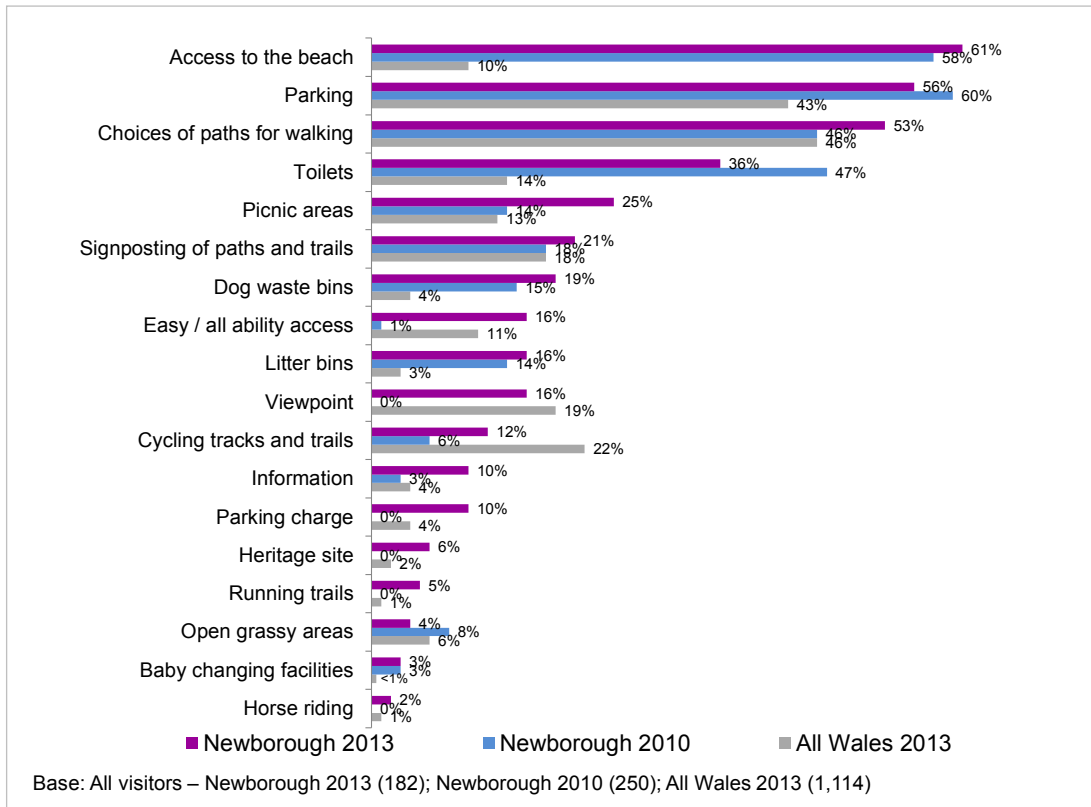
Access to the beach was mentioned by the highest proportion of visitors to Newborough (61%). This figure was in line with the previous Newborough research (58%), and while much higher than the all Wales average (10%), this is not surprising given the Newborough was the only seaside woodland included in the sample.

Parking was important to over half of the visitors (56%). Again, this was in line with the previous study (60%), but somewhat higher than the all Wales figure (43%).

Choices of paths for walking were also important to over half of the visitors to Newborough (53%). Toilets were mentioned by over a third (36%) and a quarter mentioned that picnic areas were important (25%).

Around a fifth of visitors to Newborough felt that the signposting of paths and trails (21%) and the provision of dog waste bins (19%) were important – see Figure 10 overleaf for more details.

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



6.2 Facilities used

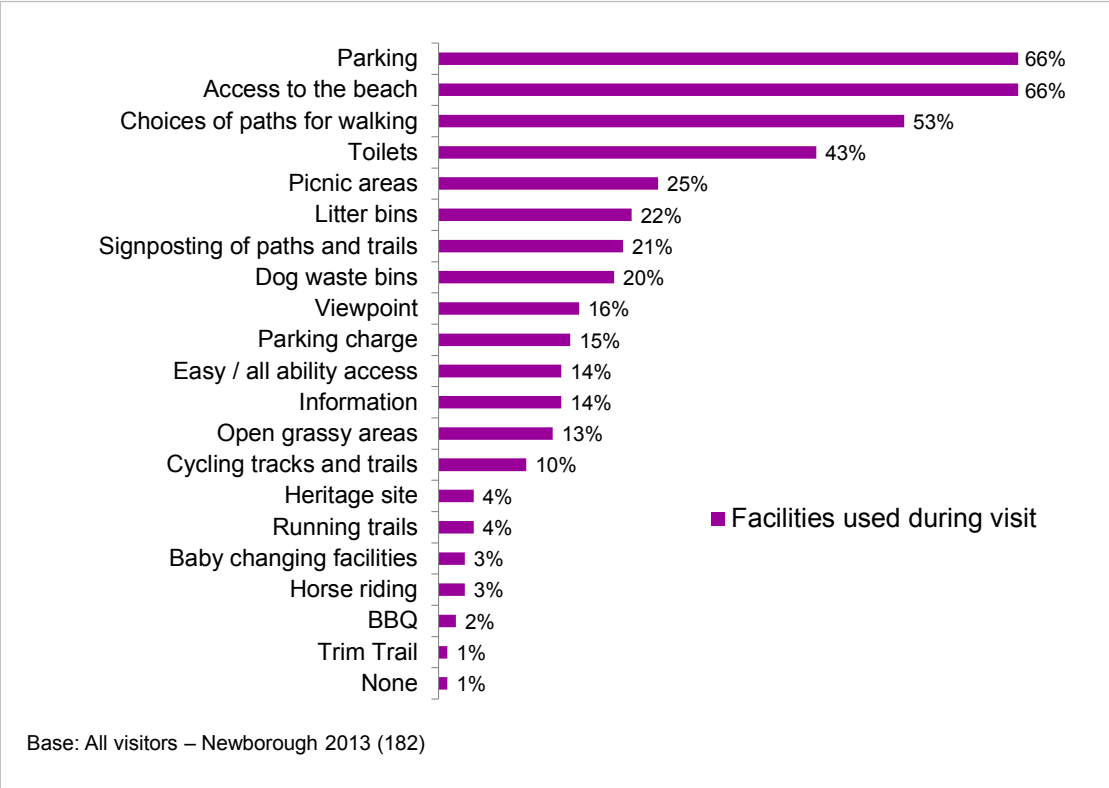
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The facilities used reflected to a large extent visitors' views of the importance of facilities. Parking and access to the beach were used by two thirds of the visitors to Newborough (66% for each), followed by a choice of paths for walking which were used by over half (53%).

The toilets were used by over four in ten of visitors to Newborough (43%) and a quarter (25%) used the picnic areas.

Around a fifth used litter bins, signposts on paths / trails and dog waste bins (22%, 21% and 20% respectively) – see Figure 11 below.

Figure 11: Q15a. Facilities used at Newborough 2013



There were some differences observed between different sub-groups of the sample:

- Adults with children were less likely to use the parking facilities (49% used them) than those without children (74% used them)
- Across the age ranges, access to the beach was least used by the younger age groups (16-34 years - 58%) compared with other age ranges. The highest use was by the 35 -54 age group (71%)
- Choices of paths for walking was least used by the 16-34 years of age group (44%) and most by the older visitors 55+ (55%).

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 Newborough have been detailed in Figure 12 below.

Ratings of most of the facilities at Newborough were very positive, with the majority giving a positive rating of either 'excellent', 'very good' or 'good'.

The facility that received the highest score was the Viewpoint. Three quarters rated this as 'excellent' (76%), whilst most of the remainder (17%) rated it as 'very good'. Parking also received a very high score: two thirds (67%) rated this as 'excellent' (67%), whilst 26% rated it as 'very good'.

Three out of five of the visitors to Newborough rated access to the beach as 'excellent' (60%), whilst the choice of paths for walking and the provision of dog waste bins were both rated as 'excellent' by 57% of visitors.

The facilities that were most frequently mentioned as 'poor' were toilets (13%) and parking charges (8%) – see Figure 12 below for more details of the ratings given for each facility.

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

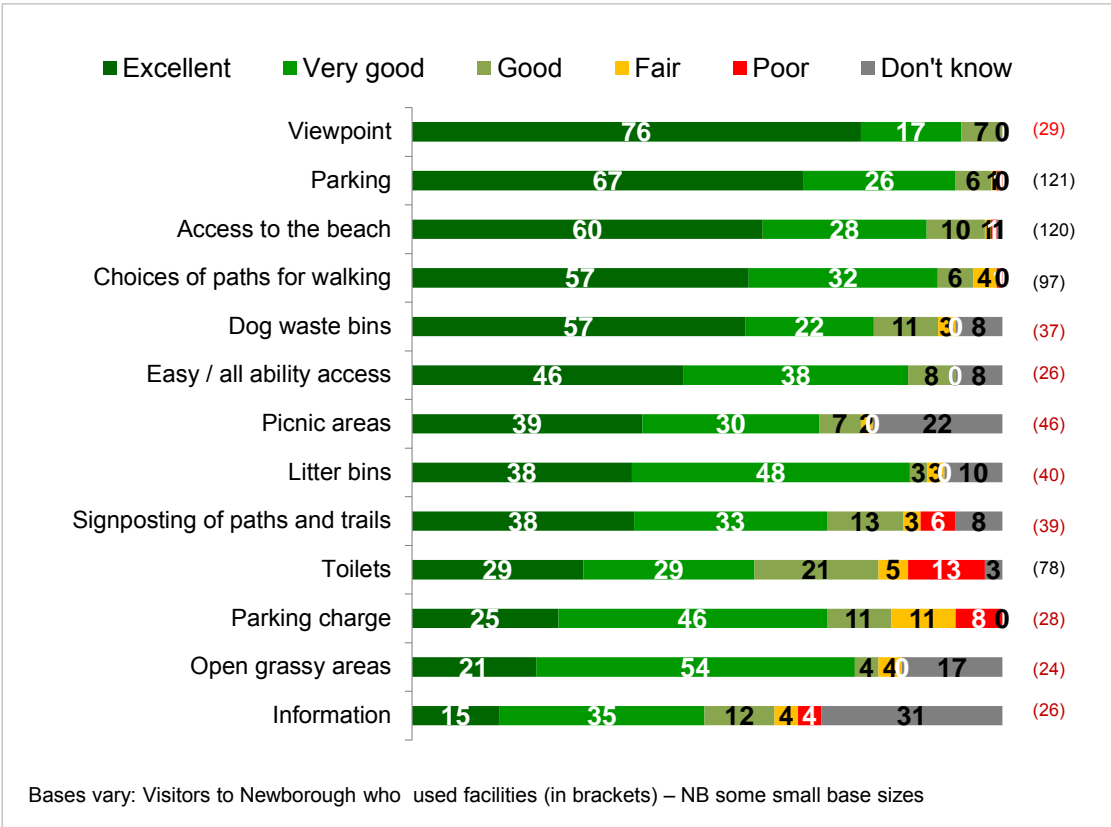


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2013 compared to 2010.

For virtually all the facilities listed, the proportions who gave an 'excellent' rating increased since the previous research, with the most significant increases seen in the proportions rating the picnic areas, dog waste bins and ease of access as 'excellent' (57%, 43% and 33% increases respectively). The only areas where scores had dipped slightly were toilets (minus 5%) and open grassy areas (minus 3%) – see Table 12 below for more details.

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

Facilities	Newborough	Newborough	% change
	2013	2010	
	%	%	
Viewpoint	76	-	-
Parking	67	40	+27
Access to the beach	60	47	+13
Choices of paths for walking	57	35	+22
Dog waste bins	57	14	+43
Easy / all ability access	46	13	+33
Picnic areas	39	18	+57
Litter bins	38	15	+23
Signposting of paths and trails	38	27	+11
Toilets	29	34	-5
Parking charge	25	-	-
Open grassy areas	21	24	-3
Information	15	7	+8

Bases vary: visitors using each facility

7. Sources of information used to plan visit

Visitors were asked where they found out about Newborough 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 outline below.

Amongst first time visitors to Newborough, almost four out of ten heard about it via word of mouth (38%) and this was by far the most frequently mentioned source of information for this group.

Amongst repeat visitors to Newborough, the vast majority said that they had been there before or always known about it (87%). This was higher than both the 2010 findings (64%) and the all Wales average (75%) – see Table 13 below for more details.

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

	First Time Visitors			Repeat Visitors		
	Newborough 2013 %	Newborough 2010 %	All Wales 2013 %	Newborough 2013 %	Newborough 2010 %	All Wales 2013 %
Word of mouth	38	48	39	14	29	19
Always known about it / been here before	16	4	13	87	64	75
Just passing / en route	9	4	11	1	4	3
Google / internet	7	10	13	1	2	2
Map	7	15	6	-	2	2
Leaflet	5	15	4	1	1	2
Tourist Board	4	4	2	1	<1	<1
Library	2	-	1	-	-	-
Local newspaper	2	-	<1	-	-	-
National newspaper	2	-	1	-	<1	<1
Road signs	2	-	4	-	1	1
Forestry Commission website	2	-	2	-	-	1
NRW Website	2	-	1	-	-	-
Sporting magazines	2	-	3	-	-	1
Accommodation provider	2	-	2	-	-	<1

Bases vary: First time vs. repeat visitors

8. Visiting other areas and attractions

Visitors to Newborough 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 (85%) had visited at least one.

The most visited attraction with over four fifths of those who went to Newborough also visiting was the beach (82%). The other most popular attractions / towns were Beaumaris (56%), Malltraeth (45%) and the Anglesey Coast Path (43%) – see Table 14 below for more details.


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

Attractions / Areas	Newborough 2013	Newborough 2010
	%	%
The beach	82	76
Beaumaris	56	63
Malltraeth	45	35
Anglesey Coast Path	43	40
Plas Newydd National Trust House	24	28
Oriel Mon Art Gallery	20	23
Anglesey Sea Zoo	19	29
Paris Mountain	18	26
Llyn Parc Mawr	7	10
Llyn Rhos Ddu	4	7
Braint	3	8
None of these	7	10
Don't remember	1	1

Base: All visitors – Newborough 2013 (182); Newborough 2010 (250)

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> NEWBOROUGH (BEACH CP & MALLTREATH)	FOR OFFICE USE ONLY		INTERVIEWER RECORD WEATHER CONDITIONS (3-6m) CAN MULTI-CODE Sunshine 1 Cloud 2 Rain 3 Wind 4 Other (specify) _____
	Case No.	Point (1-2)		

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

WALES ONLY

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

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

(7)

3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

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

- English
Welsh

(8)

1
2

ASK ALL

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

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

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

SHOWCARD A

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

- A day trip of less than 3 hours away from home
A day trip of more than 3 hours away from home
A visit that includes an overnight stay 3
Part of a longer holiday / visit 4
Don't know

(18)

1
2

5

SHOWCARD B

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

SINGLE CODE

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

(20)

SHOWCARD C

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

RECORD IN COLUMN A - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

Q4b And which of these activities have other members of your group taken part in during your visit here today?

RECORD IN COLUMN B - CODE ALL MENTIONED

ASK ALL - SHOWCARD C AGAIN

Q5 And which of these activities are you (**IF PART OF GROUP:** or other members of your group) planning to take part in during your visit here today?

RECORD IN COLUMN C - CODE ALL MENTIONED

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

ASK ALL

SHOWCARD D

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

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

SHOWCARD D AGAIN

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

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

ASK ALL

SHOWCARD E

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

(59-62m)

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

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

SHOWCARD F

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

SINGLE CODE

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

ONLY ASK Q13 IF CODED 1-6 AT Q12

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

RECORD VERBATIM

Don't know

ASK ALL

SHOWCARD G

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

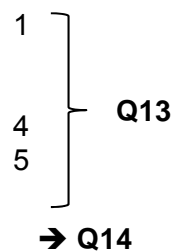
CODE ALL MENTIONED

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

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

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

(90)



(91-94m)

M

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

SHOWCARD G AGAIN

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

RECORD IN COLUMN A – CODE ALL MENTIONED

SHOWCARD H

Q15b Now I would like you to rate each of the aspects of the site that you have used during today's visit. So how would you rate....?

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

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

LIST CONTINUED OVERLEAF

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

ASK ALL

SHOWCARD H AGAIN

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

- Excellent
- Very good 2
- Good 3
- Fair
- Poor
- Very poor 6

- Don't know / not sure 7

(210)

1

4

5

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 _____ (212-217)
- Food and drink purchased outside any accommodation _____ (218-223)
- Admissions fees to attractions _____ (224-229)
- Parking _____ (230-235)
- Non-routine shopping (e.g. buying souvenirs) _____ (236-241)
- Transport including petrol, taxis, public transport etc. _____ (242-247)
- Hiring equipment such as boats, bikes or horses _____ (248-253)
- Other miscellaneous items _____ (254-259)

**NOW GO TO
Q19**

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 _____ (261-266)
- Food and drink purchased outside any accommodation _____ (267-272)
- Admissions fees to attractions _____ (273-278)
- Parking _____ (279-284)
- Non-routine shopping (e.g. buying souvenirs) _____ (285-290)
- Transport including petrol, taxis, public transport etc. _____ (291-296)
- Hiring equipment such as boats, bikes or horses _____ (297-302)
- Other miscellaneous items _____ (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?

(400-403m)

CODE ALL MENTIONED

- Llyn Parc Mawr
- Malltraeth
- Llyn Rhos Ddu
- Braint
- Anglesey Sea Zoo 5
- Plas Newydd National Trust House 6
- Beaumaris 7
- Paris Mountain 8
- Anglesey Coast Path 9
- Oriel Mon (art Gallery)
- The beach (general) B

- None of these L

- Don't know / can't remember M

- 1
- 2
- 3
- 4

- A

SHOWCARD K

Q20 What type of accommodation did you stay in last night? If this is the first night of your trip, please could you tell us where you intend to stay tonight?

(404)

SINGLE CODE

- Hotel or motel
- Guesthouse 2
- B&B or pub 3
- Self-catering accommodation 4
- Caravan, camping or hostel 5
- With friends and family 6

- Other (please specify) _____

- Not applicable – have come from home / live nearby

- 1

- L

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

ASK ALL

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

Q21 INTERVIEWER RECORD GENDER (603)

- Male
- Female

- 1
- 2

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

(604)

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

- Refused

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

- 7

SHOWCARD L

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

(605)

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

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

(606)

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

Job title _____

Position / Grade _____

- AB 1
- C1 2
- C2 3
- DE 4
- Refused 5

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

(607)

- Yes 1
- No 2
- Refused 3

Q26 Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?
INCLUDES PROBLEMS RELATED TO OLD AGE

(608)

- 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 4
 White other European 5
 Any other White background (please specify) _____

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

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

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

Chinese

Other (please specify) _____ I

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

E

7
F

8
9

G

H

J

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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