

**beaufortresearch**

# Research Report

Quality of the Visitor  
Experience 2015

Tan y Coed



Prepared for:  
Natural Resources Wales /  
Forestry Commission England

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# 1. Executive summary

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## 1.1 Quality of Visitor Experience Research

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

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

This report summarises the findings from the 164 visitor interviews conducted at Tan y Coed in 2015. Throughout the report, comparisons have been made to the 'All Wales' figures (aggregated results from all 7 sites), and the previous survey conducted at this site in 2012 (where applicable) to track any changes over time.

## 1.2 Tan y Coed

Tan y Coed is situated south of Corris, and is the starting point for two tranquil woodland and riverside walks, with an easy access picnic site.

As well as an animal puzzle trail, there is an audio trail which tells the story of the Timber Jill's, who were women who used to work in forests during the Second World War.

### 1.3 Perceptions of the site

Perceptions of Tan y Coed as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Tan y Coed in gave a negative rating of the site.

However, opinions of Tan y Coed were less enthusiastic in 2015 compared to 2012. Just under half (46%) rated the site as 'excellent'; considerably lower than the data from the 2012 survey (74%) and slightly lower than the all Wales figure (58%). A further 47% gave the site a rating of 'very good' and 3% rated it as 'good'. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 93%, comparable to the 2012 figure of 95%.

Similarly, ratings of how safe and welcoming Tan y Coed felt were also positive, although less so than was seen in 2012. Again, none of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just over half of visitors gave this measure an 'excellent' rating (54%); this was in line with figure obtained for all Wales sites (52%), but lower than the findings from the 2012 survey (67%).

Another two fifths (41%) gave a 'very good' rating for how safe and welcoming Tan y Coed felt (higher than both the all Wales and 2012 figures). One in twenty (5%) gave a 'good' rating. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 95%, comparable to the 2012 figure of 94%.

When asked whether they would be likely to recommend Tan y Coed as a place to visit to a friend or relative (using a score of 0-10), Tan y Coed and all Wales sites generally were extremely positive: only 6% gave a rating of less than 8/10 for Tan y Coed, which was lower than the 2012 position, when 14% of visitors gave a rating of less than 8/10.

Saying that, more people tended to give ratings of 8/10 or 9/10 at Tan y Coed in 2015 (53%) compared to the previous survey (18%) or the all Wales average (31%). Therefore while there were fewer negative ratings at this site than was seen previously, the proportion giving the highest rating of 10/10 dropped from 70% in 2012 to 41% in 2015 (also lower than the all Wales average of 62%).

Reflecting the change in the distribution of scores, the mean rating for Tan y Coed stood at 9.1, lower than both the 2012 average rating of 9.3 and the all rating of Wales at 9.4.

Ratings of most of the facilities were positive, with the vast majority giving a positive rating of either 'excellent', 'very good' or 'good'; nobody gave a negative rating for any of the facilities outlined.

The feature that received the highest score was the open grassy areas; nearly nine in ten 'users' rated these as 'excellent', with another 9% rating them as 'very good'. The remaining 2% rated them as 'good'.

Just under eight in ten gave an 'excellent' rating for the car parking and walking trails (78% and 77% respectively), while the picnic / BBQ areas were considered 'excellent' by seven in ten (71%).

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

Fairly high numbers of visitors mentioned aspects of the site that they liked, and no one aspect stood out as being favoured over any others. Around half of visitors mentioned the peace and beauty of the site (51% and 49% respectively), with slightly smaller proportions mentioning the fresh air (47%), cleanliness (45%) and walk, paths and trails at Tan y Coed (41%). Most of these figures were in line with both the 2012 survey and the all Wales data, with the exception of fresh air / being outside (only 10% in 2012 cf. 47% in 2015).

Roughly three in ten liked the opportunity to exercise and keep fit at the site (30%), and well as the variety of trees and plants (26%); exercising was not mentioned at all in 2012.

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

Turning firstly to what would enhance their enjoyment of the site; at Tan y Coed, the majority of visitors felt that nothing could be improved and only gave positive comments (70%). This was higher than the all Wales average of 53%, indicating that fewer visitors had any issues with the site compared to all sites in general across Wales (30% saying something could be improved cf. 47% overall). Amongst the comments received (albeit by small numbers of visitors), most called for more dog poo bins, and for dog poo to be cleaned up (7%). Another 5% would like to see the provision of a café, restaurant or other catering, while 4% would simply like better weather for their trip.

When asked if there was anything that interfered with their enjoyment of their visit to Tan y Coed, the vast majority (82%) reported that nothing had. This was higher than the proportion saying the same at all Wales sites (68%), again illustrating that visitors to Tan y Coed found fewer issues with this site compared to all Wales sites in general.

Amongst the small number of comments received, poor weather was mentioned by most visitors (9%); other comments (from 2% each of visitors) related to dog poo on the paths and in the play areas, unclear signage and motorcyclists being on paths (or cars too close to the road).

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

- Some paths are difficult/dangerous (steep drops, loose shale, steep for kids)
- Dogs off leads / loose dogs / don't want dogs around
- Need more litter bins / recycling bins / too much litter
- Noisy (low flying aircraft / jets or road)
- Poor maintenance of site (paths, fences, waterways)
- Need more dog poo bins
- No café
- Midges.

## 1.6 Visitor profile

In 2015, a third (34%) of visitors to Tan y Coed were first time visitors; this proportion was in line with both the all Wales average (37%) and the 2012 figure of 31% who said they had **never** visited their respective NRW site before. Therefore around two thirds of visitors to Tan y Coed had been to the site previously (65%).

There were a significantly higher proportion of visitors staying in the area as part of a holiday at Tan y Coed in 2015 compared to both the 2012 survey and the all Wales data. Over half of visitors to the site were holiday-makers (57%), compared to 40% in 2012 and just 28% across all Wales sites. A further 4% of visitors to Tan y Coed in 2015 were staying overnight in the area (compared to 7% in 2012 and 9% all Wales).

Day-trippers made up only two fifths of visitors to Tan y Coed (40%), with most of these travelling for less than three hours to get to the site (30%). In 2012, and across all Wales sites in 2015, around half of visitors were local day-trippers (50% and 52% respectively).



There was a slight skew towards more male than female visitors to the site (58% male vs. 42% female); this was slightly more balanced than the 2012 figures (61% male and 39% female), and equal to the 2015 all Wales data.

In terms of age; the profile of visitors to Tan y Coed was very similar to previous research at this site, but older than the all Wales average. Just over half (51%) were aged 55+ years (cf. 45% in 2012 and 34% all Wales). Only 13% were aged 16-34 years; this was in line with the previous research (16%) but markedly lower than the all Wales proportion (22%). People aged 34-54 years accounted for around a third of visitors (36%), similar to both 2012 (37%) but lower than the all Wales figure (43%).

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). This skew was less pronounced at Tan y Coed, with 61% of visitors categorised as ABC1, and 37% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

## 2. Introduction

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### 2.1 Background

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

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

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

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

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

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

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

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

## 2.2 Research programme

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

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

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

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

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

\* H = High usage; M = Medium usage

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

The core interviewing period ran from March to October 2015. At Tan y Coed, interviewing took place between 5<sup>th</sup> April and 30<sup>th</sup> October, and a total of 164 interviews were conducted.

## **2.3 Report**

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

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

## **2.4 Data tables**

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

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

### 3. Visitor profile information

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#### 3.1 Visitor profile

Visitors were asked a number of questions to determine the types of people who were visiting Tan y Coed. Table 2 overleaf details the profile of visitors, compared to the profile of visitors in 2012, and to all sites surveyed in Wales in 2015. The profile of visitors to Tan y Coed was similar to that of the previous survey, but varied slightly from the profile of visitors to all the Wales sites, especially in terms of age and socio-economic grade.

There was a slight skew towards more male than female visitors to the site (58% male vs. 42% female); this was slightly more balanced than the 2012 figures (61% male and 39% female), and equal to the 2015 all Wales data.

In terms of age; the profile of visitors to Tan y Coed was very similar to previous research at this site, but older than the all Wales average. Just over half (51%) were aged 55+ years (cf. 45% in 2012 and 34% all Wales). Only 13% were aged 16-34 years; this was in line with the previous research (16%) but markedly lower than the all Wales proportion (22%). People aged 34-54 years accounted for around a third of visitors (36%), similar to both 2012 (37%) but lower than the all Wales figure (43%).

On the whole, visitors to woodlands sites and NNRs in Wales tended to belong to the higher socio-economic groups of ABC1 (professional, managers and non-manual positions = 75%) rather than the lower C2DE socio-economic groups (skilled and non-skilled manual workers, those on benefits = 25%). This skew was less pronounced at Tan y Coed, with 61% of visitors categorised as ABC1, and 37% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

Nearly half of visitors to Tan y Coed were in full-time employment (47%); this figure was in line with that found in the previous research in 2012 (48%), but lower than the all Wales average (59%). Reflecting the older age profile, nearly three in ten visitors to this site were retired (29%); slightly higher than the proportion in the 2012 survey (24%) and noticeably higher than the all Wales average (18%).

Around a quarter of visitors to Tan y Coed (26%) had children living at home; in line with all Wales average of 29% (no data for 2012).

The vast majority of visitors to Tan y Coed were White British / Welsh / Irish (95%), with just 5% describing their ethnicity as 'White other'. None of the visitors to Tan y Coed described themselves as 'Black / Asian / Mixed', illustrating a less ethnically diverse visitor base at Tan y Coed compared to all sites across Wales (where 7% were 'White other' and 2% BME).

Around six in ten visitors to Tan y Coed spoke Welsh (17%), higher than the all Wales average of 13% – see Table 2 below for more details.

**Table 2: Profile of visitors by key demographics 2015**

Demographic groups		Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales %
<b>Gender</b>	Male	58	61	58
	Female	42	39	42
<b>Age</b>	16 - 24	4	5	6
	25 - 34	9	11	16
	35 - 44	13	14	21
	45 - 54	23	23	22
	55 - 64	24	25	19
	65+	27	20	15
	Refused	-	1	1
	<b>Social class</b>	AB	24	
C1		37		43
C2		26		16
DE		11		9
Refused		1		1
<b>Working status</b>	Full-time employee (30+ hours per week)	47	48	59
	Part-time employee (<30 hours per week)	13	12	9
	Self-employed	4	8	6
	Full-time education	2	3	3
	Permanently sick / disabled	1	-	1
	Retired	29	24	18
	Looking after the home	1	3	2
	Other	1	1	<1
	Refused	2	-	1
	<b>Limiting illness</b>	Yes – limited a lot / little	4	14
No		95	86	92
Refused		-	-	2
<b>Children in household</b>	Yes	26		29
	No	74		70
	Refused	-		1

Demographic groups		Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales %
<b>Ethnicity</b>	White – British / Welsh / Irish	95		91
	White – Other	5		7
	Black / Asian / Mixed	-		2
<b>Welsh speaker</b>	Yes	17		13
	No	83		87

Base: All visitors – Tan y Coed 2015 (164); Tan y Coed 2012 (118) All Wales (1,188).

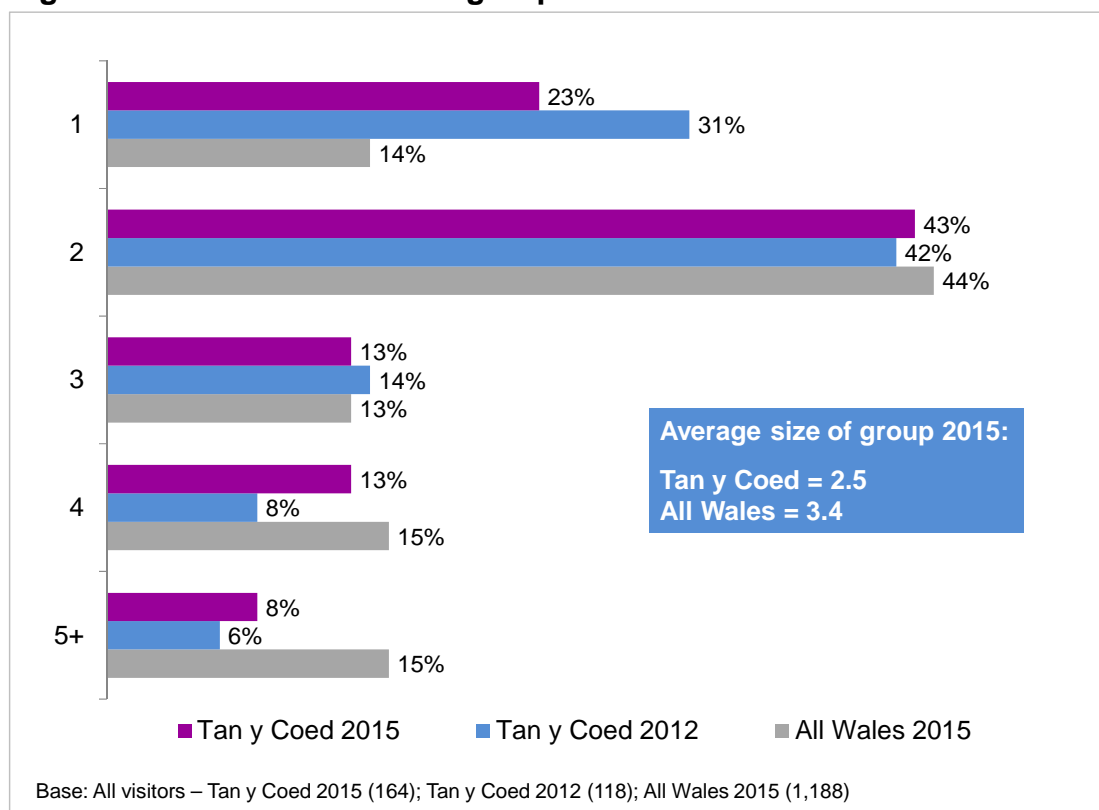
## 3.2 Group profile

### 3.2.1 Size of group

Group sizes at Tan y Coed were smaller than group sizes to all Wales sites (2.5 people per group cf. 3.4 people all Wales). Reflecting this, there were more lone visitors to this site compared to all sites across Wales (23% cf. 14%), although the number of lone visitors has markedly decreased since the previous research in 2012 (down from 31%). Moreover, the number of larger groups (5+ people) was lower at Tan y Coed in both 2015 and 2012 (8% and 6% respectively) compared to the 2015 all Wales figure (15%).

Most visitor groups were made up of two people (43%); this was in line with both the 2012 data (42%) and the 2015 all Wales data (44%) – see Figure 1 below.

**Figure 1: Q1. Total size of the group**



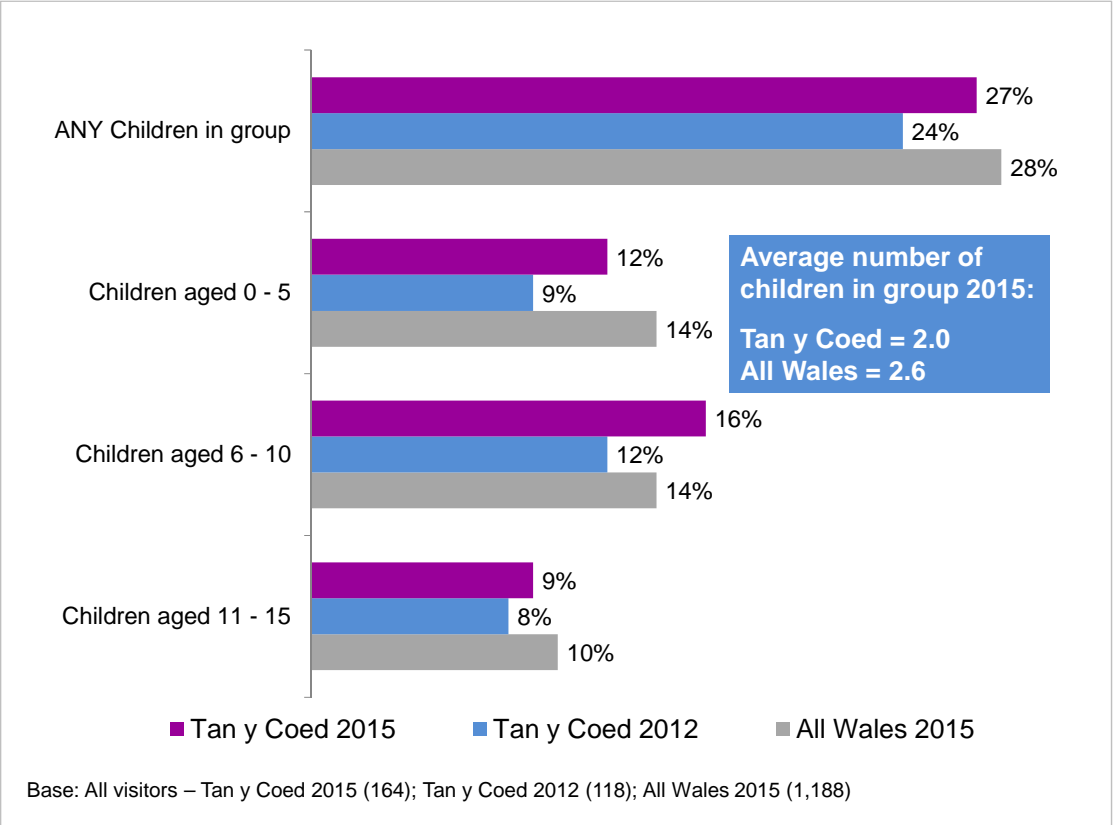
### 3.2.2 Composition of group

Around a quarter of visitor groups at Tan y Coed contained children (27%); this has increased slightly since 2012 (24%) but is consistent with the 2015 all Wales figure (28%). However, the average number of children within these groups was smaller compared to all Wales (2.0 children per group cf. 2.6 all Wales).

The proportion of groups with children of various ages have all increased since 2012; in 2015 there were more groups with 0-5 year olds (12% cf. 9%), 6-10 year olds (16% cf. 12%) and 11-15 year olds (9% cf. 8%).

Data collected at Tan y Coed in 2015 was comparable to the all Wales data in terms of the proportions of visitors groups containing younger and older children - see Figure 2 below.

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





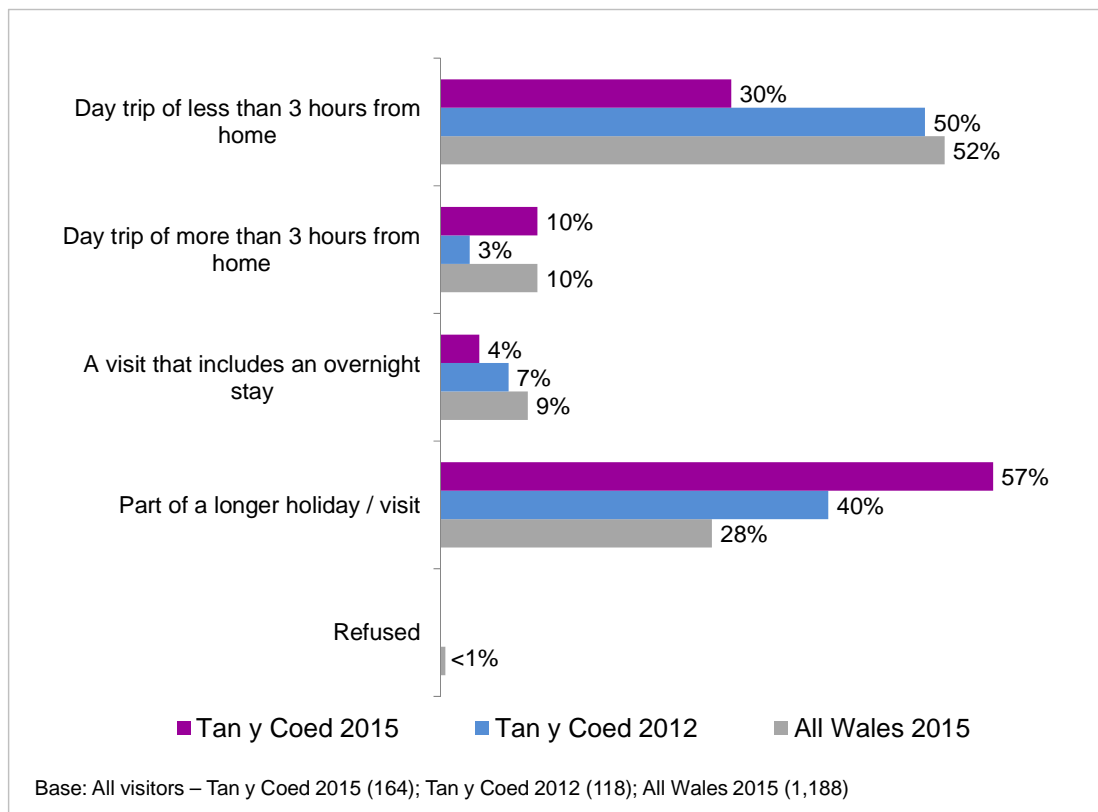
## 4. Profile of visit

### 4.1 Type of visit

There were a significantly higher proportion of visitors staying in the area as part of a holiday at Tan y Coed in 2015 compared to both the 2012 survey and the all Wales data. Over half of visitors to the site were holiday-makers (57%), compared to 40% in 2012 and just 28% across all Wales sites. A further 4% of visitors to Tan y Coed in 2015 were staying overnight in the area (compared to 7% in 2012 and 9% all Wales).

Day-trippers made up only two fifths of visitors to Tan y Coed (40%), with most of these travelling for less than three hours to get to the site (30%). In 2012, and across all Wales sites in 2015, around half of visitors were local day-trippers (50% and 52% respectively) - 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.

Reflecting the propensity of staying visitors to the site, around half of visitors to Tan y Coed lived outside of Wales (48%), with 43% visiting from England and 5% from abroad. The proportion of visitors from England at Tan y Coed was noticeably higher than that seen across all Wales sites (35%). The proportion of overseas visitors to this site was comparable to the all Wales average (5% Tan y Coed cf. 4% all Wales).

Amongst the half (52%) of visitors coming from Wales, most of these lived fairly close by, either in Mid / West Wales (29%) or North Wales (17%). Only 6% lived in either South West Wales or the Valleys (none of the visitors interviewed had travelled from South East Wales) - Table 3 below and Figure 4 overleaf provide more details.

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

**Table 3: Q28b. Visitor origin 2015**

Area of residence		Tan y Coed 2015 %	All Wales %
<b>Home region</b>	North Wales	17	4
	Mid / West Wales	29	14
	South West Wales	5	7
	Valleys	1	6
	South East Wales	-	30
	Outside of Wales	48	39
<b>Home nation</b>	Wales	52	61
	England	43	35
	Rest of UK	-	<1
	Abroad	5	4

Base: All visitors – Tan y Coed 2015 (164); All Wales (1,188)

Figure 4a: Map of visitor origin for Tan y Coed 2015



Figure 4b: Map of visitor origin for Tan y Coed 2012



## 4.3 Frequency of visits

### 4.3.1 First-time visitors

In 2015, a third (34%) of visitors to Tan y Coed were first time visitors; this proportion was in line with both the all Wales average (37%) and the 2012 figure of 31% who said they had **never** visited their respective NRW site before.

Around two thirds of visitors to Tan y Coed had been to the site previously (65%).

### 4.3.2 Repeat visitors

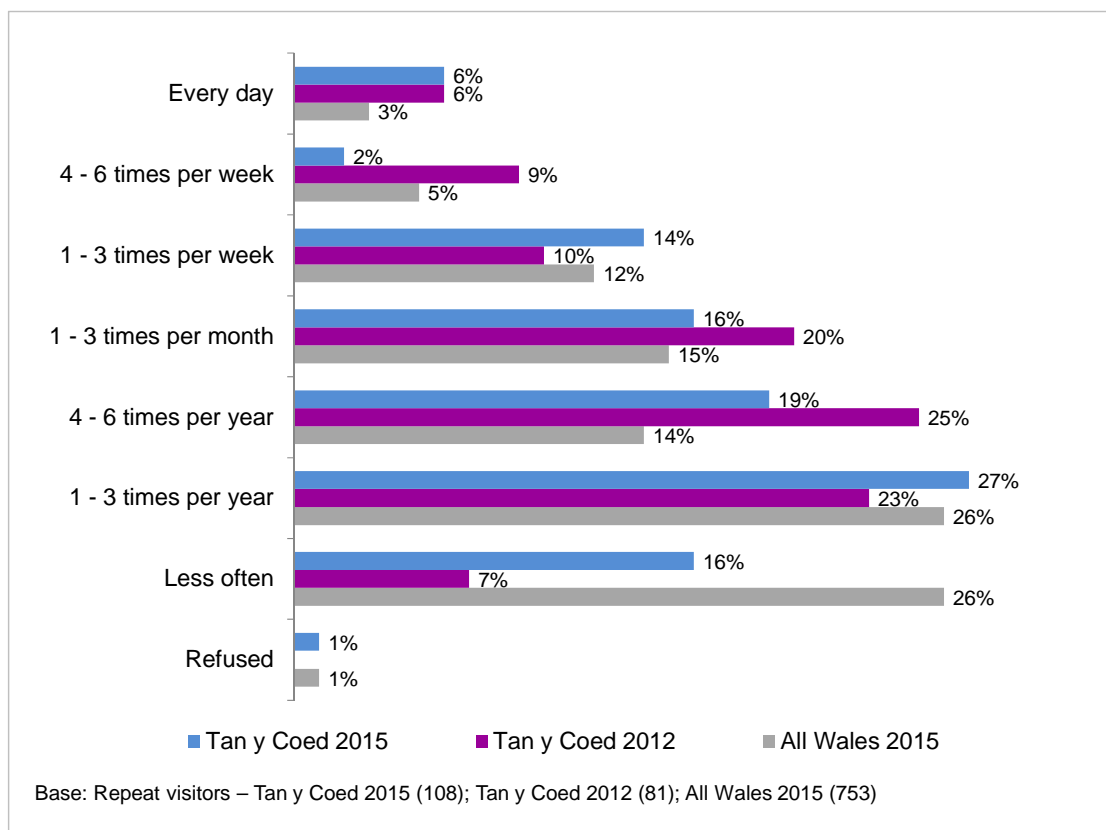
Focussing on repeat visitors; although around half of visitors to Tan y Coed lived outside of Wales, a relatively high proportion of visitors came to the site several times a year (62%); 16% of these visited one to three times a month, and 46% visited between one and six times a year.

Weekly visitors accounted for 22% of the survey sample, while infrequent visitors (coming to the site less often than once a year) made up a relatively small proportion of just 16%.

Visitors tended to be coming to the site less often in 2015 compared to 2012; there were fewer visitors coming to the site between four and twelve times a year in 2015 (35%) compared to 2012 (45%), and more visitors coming three times a year or less often (43% cf. 30%). Moreover, there were slightly fewer weekly visitors (22% cf. 25%).

However, compared to the all Wales data in 2015, visitors to Tan y Coed tended to visit more frequently. There were slightly more weekly visitors to this site (22%) compared to all sites across Wales (20%), more visitors coming several times a year (62% cf. 55%) and significantly fewer visitors who came less often than once a year (16% cf. 26%) – see Figure 5 overleaf.

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



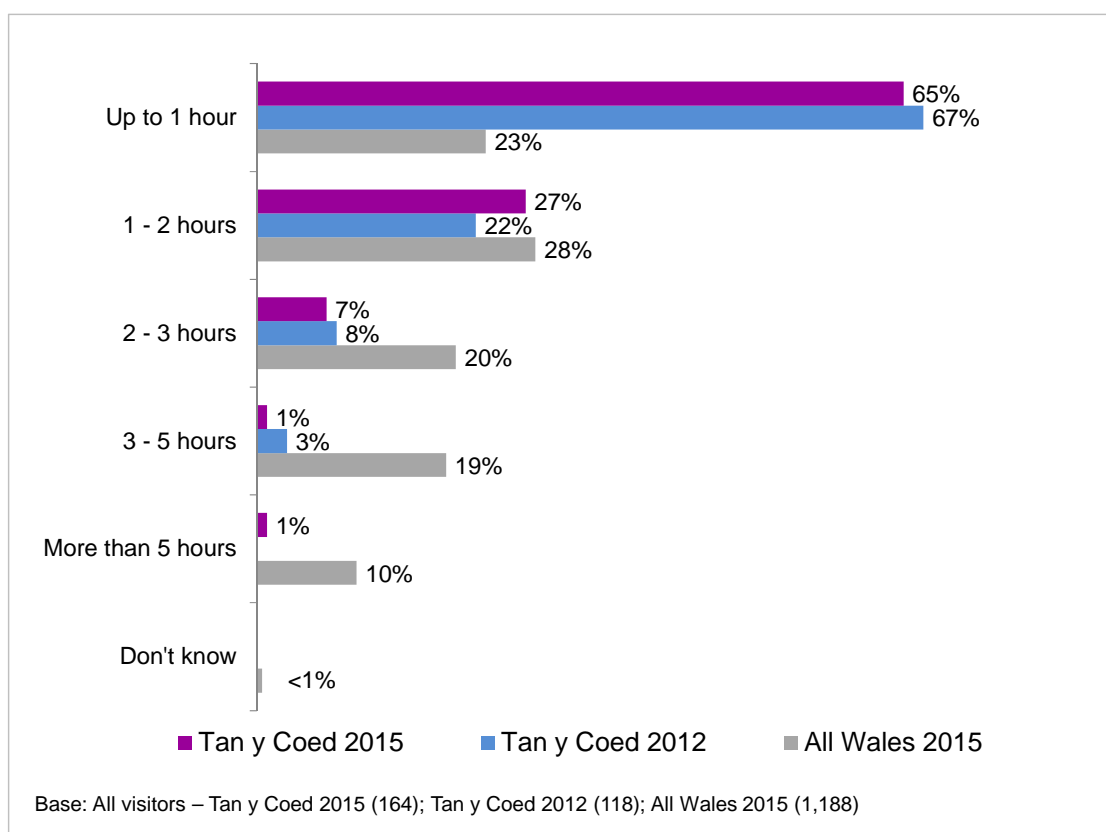
#### 4.4 Length of visit

Visits to Tan y Coed tended to be relatively short, lasting less than an hour (average 57 minutes); this was much shorter than average length of stay across all sites in Wales (2 hours 24 minutes), but equal to the average stay in 2012.

The varying lengths of time visitors spent at Tan y Coed can be seen below. As reflected in the average time at the site, the majority of visitors reported that they had stayed up to an hour at the site (65%). This proportion was much higher than the all Wales average of 23%, but in line with the 2012 survey data (67%).

Only a third of visitors intended to stay longer than an hour at the site (36%), with a very small proportion staying longer than three hours (2%). While in line with the 2012, this varies considerably from the all Wales picture, where the majority of visitors intended to spend longer than an hour at their respective site (77%), and almost a third staying for three hours or more (29%) – see Figure 6 overleaf.

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



#### 4.5 Activities undertaken

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

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

While the most popular activity at Tan y Coed was walking generally (69%), although this proportion was significantly lower than the all Wales position (92%). It was, however, higher than the proportion of walkers seen in 2012 (46%).

There was a fairly even split between walkers using the sign-posted trails (34%) and dog walkers (39%). Usage of the sign-posted trails was half that seen across all Wales sites (68%), but greater than the 2012 level of usage (25%). One in ten (8%) walked off the sign-posted trails.

Only a very small proportion of visitors interviewed at Tan y Coed in 2012 had taken part in cycling activities (1%); this was comparable to all Wales data and the previous research, where only 1% of visitors had cycled. Other physical activities such as orienteering / Geocaching and running / jogging were only undertaken by a small proportion of visitors to this site (1% and 2% respectively); nobody took part in horse-riding at this site.

Therefore, while seven in ten visitors (71%) took part in 'active' activities, this was considerably lower than the proportion of active visitors across all Wales sites (93%). It was, however, higher than the 2012 proportion (41%).

The most popular 'passive' activities at Tan y Coed were admiring the views (23%) and having a picnic or barbeque (22%). Other popular 'passive' activities included bird watching (8%), seeing something in the forest (7%) and photography (5%) - see Table 4 below and overleaf.

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

Activities undertaken	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Cycling on forest roads, tracks or trails	1	-	1
Cycling off trails or tracks	-	1	1
<b>TOTAL CYCLING</b>	<b>1</b>	<b>1</b>	<b>1</b>
Walking on a sign-posted trail	34	25	68
Walking but not following sign-posts	8	2	28
Dog walking	39	30	24
<b>TOTAL WALKING</b>	<b>69</b>	<b>46</b>	<b>91</b>
Orienteering / Geocaching	1	-	1
Running / jogging	2	7	2
Horse-riding	-	-	<1

Activities undertaken continued	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Admiring the views	23	19	24
Picnic or barbeque	22	31	12
Bird watching	8	4	13
Seeing something in the forest	7	1	5
Using the toilets	7	-	
Photography	5	7	16
Nature / natural history visit	4	5	5
Using the café / restaurant / other catering	2	-	13
Using the play area	2	-	
Look for wildlife / plants / animals	1	-	
A forest drive	1	-	1
<b>Taken part in ACTIVE activities</b>	<b>71</b>	<b>41</b>	<b>93</b>
<b>Taken part in PASSIVE activities</b>	<b>59</b>	<b>Not available</b>	<b>59</b>

Base: All visitors – Tan y Coed 2015 (164); Tan y Coed 2012 (118) All Wales (1,188).

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

#### 4.6 Length of time spent on activities

Those visitors who had actually taken part in certain physical activities were asked how long they had spent doing these. Walking activities have been analysed in Table 5 below – due to the small number of people undertaking running / jogging (3) and orienteering / Geocaching (2), these have not been commented on.

As previously mentioned; visits to Tan y Coed lasted 57 minutes on average. There was a slight inconsistency between the length of time spent at the site as a whole and the average time spent walking; this was also seen in 2012.

The reported average time spent walking was 1 hour and 1 minute (compared to 56 minutes at the site). In 2012, the average time spent walking was 1 hour 5 minutes (compared to 57 minutes at the site). The assumed explanation for this is that a number of visitors were over-estimating the time spent on walking, increasing the overall average time spent on this activity.



Most visitors who walked had done this for an hour or less (60%). A further third had walked around the site for between one and two hours (31%), with only 9% walking for longer than two hours. On the whole, this picture was in line with the 2012 data – see Table 5 below.

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

Time at site	Total duration of visit		Time spent on any walking	
	2015	2012	2015	2012
Up to 30 minutes	43	42	33	21
31 – 60 minutes	22	25	27	31
1 – 2 hours	27	22	31	44
2 – 3 hours	7	8	7	2
3 – 5 hours	1	3	2	2
5+ hours	1	-	-	-
Don't know	-	-	-	-
<b>AVERAGE</b>	<b>57 mins</b>	<b>57 mins</b>	<b>1 hour 1 min</b>	<b>1 hour 5 mins</b>

Base: All respondents - 2015 (164); 2012 (118)  
 Respondents who walked - 2015 (112); 2012 (52)

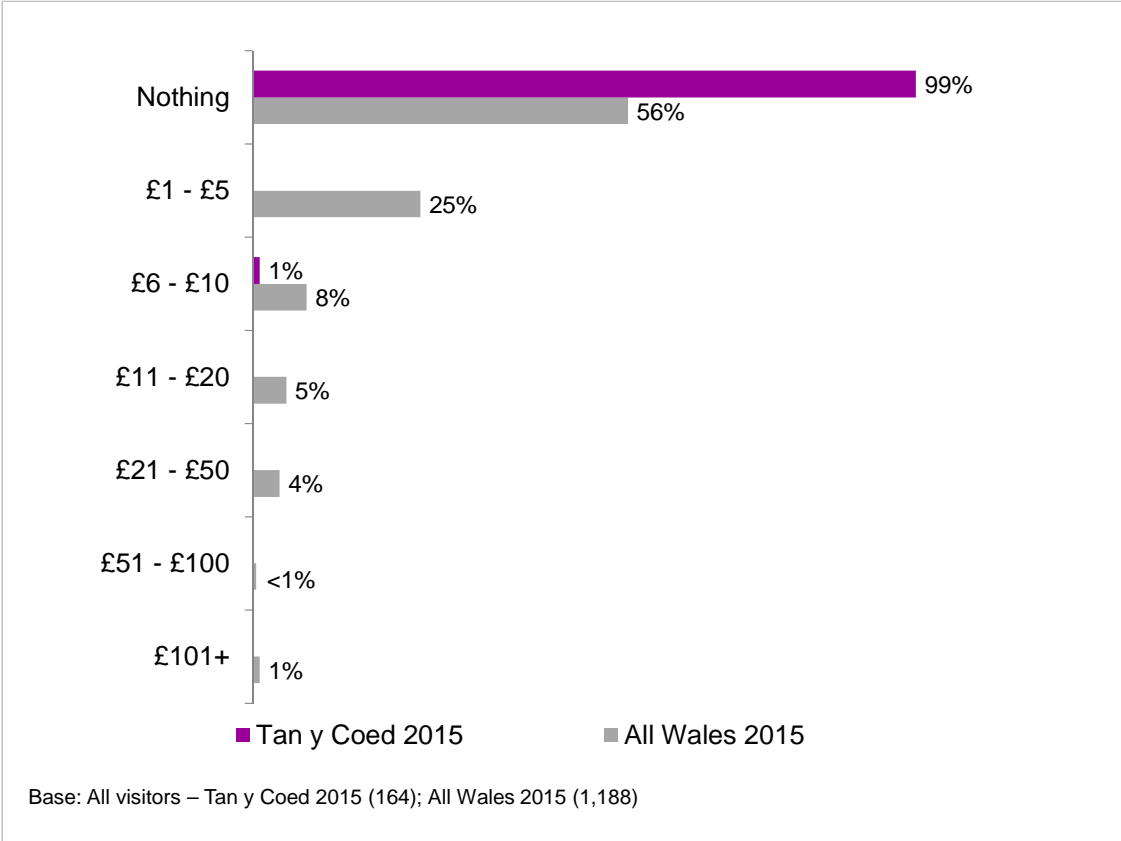
**4.7 Money spent at site and in the area as a result of the visit**

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

Virtually all of the visitors to Tan y Coed said that they did not intend to spend any money at the site (99%); just 1% of visitors said they intended to spend between £6 and £10 (on parking), meaning the average spend at Tan y Coed was very low (£0.05). This compared to an average spend of £6.99 across all Wales sites – see Figure 7 below for more details.

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

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



When looking at individual types of spending at the site, the only area of spend at Tan y Coed was parking, with just 1% (1 person) reporting that they were likely to spend on this (average £0.05 cf. £1.68 all Wales average). Please note that all averages include zero expenditure – see Table 6a below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Tan y Coed %	All Wales %	Tan y Coed £	All Wales £
Food and drink	-	22	-	2.16
Activities at the site	-	1	-	1.56
Parking	1	27	£0.05	1.68
Souvenirs / gifts	-	3	-	0.41
Hiring equipment	-	1	-	1.11
Anything else	-	1	-	0.10

Base: All visitors – Tan y Coed 2015 (164); All Wales 2015 (1,188)

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

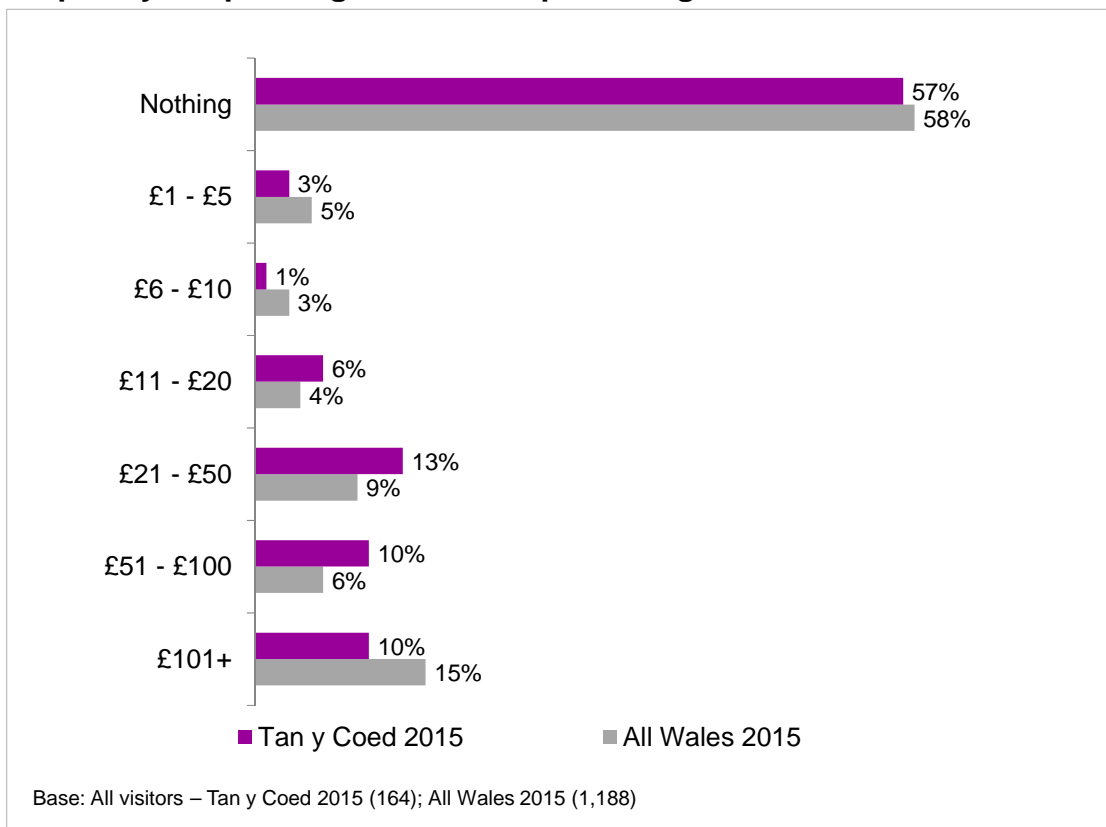
Around six in ten visitors to Tan y Coed claimed that they **would not** be spending anything in the area as a result of their trip (57%); this was in line with the all Wales average of 58% saying the same.

Amongst the four in ten visitors who **did** intend to spend anything in the area (43%), amounts varied, and ranged from small sums of less than £5 to over £101.

One in ten (10%), claimed they would be spending up to £20, with another 13% saying they would spend between £21 and £50. A further fifth (20%) said they intended to spend more than £51. The average spend in the area as a result of their visit to the site was £42.53; lower than the all Wales average of £87.52.

Figure 8 below provides more details of the proportions of Tan y Coed visitors spending in each of the banded groups.

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



Looking at spend in the local area as a result of their visit to Tan y Coed, food and drink and transport and were mentioned by the highest proportions of visitors (30% for each); visitors were likely to spend £13.38 on food and drink (lower than the all Wales average of £21.06) and £9.64 on transport (slightly higher than the all Wales average of £9.15). A further 10% intended to spend an average of £19.10 on accommodations (considerably lower than the all Wales average of £52.23) - see Table 6b overleaf.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Tan y Coed %	All Wales %	Tan y Coed £	All Wales £
Food and drink	30	29	13.38	21.06
Accommodations	10	19	19.10	51.81
Admissions to other attractions	3	4	1.18	3.99
Parking	2	7	0.25	1.67
Transport	30	22	9.64	9.15
Souvenirs / gifts	7	4	1.81	1.65
Hiring equipment	-	1	-	1.82
Anything else	2	2	0.37	1.02

Base: All visitors – Tan y Coed 2015 (164); All Wales 2015 (1,188)

## 5. Perceptions of the site

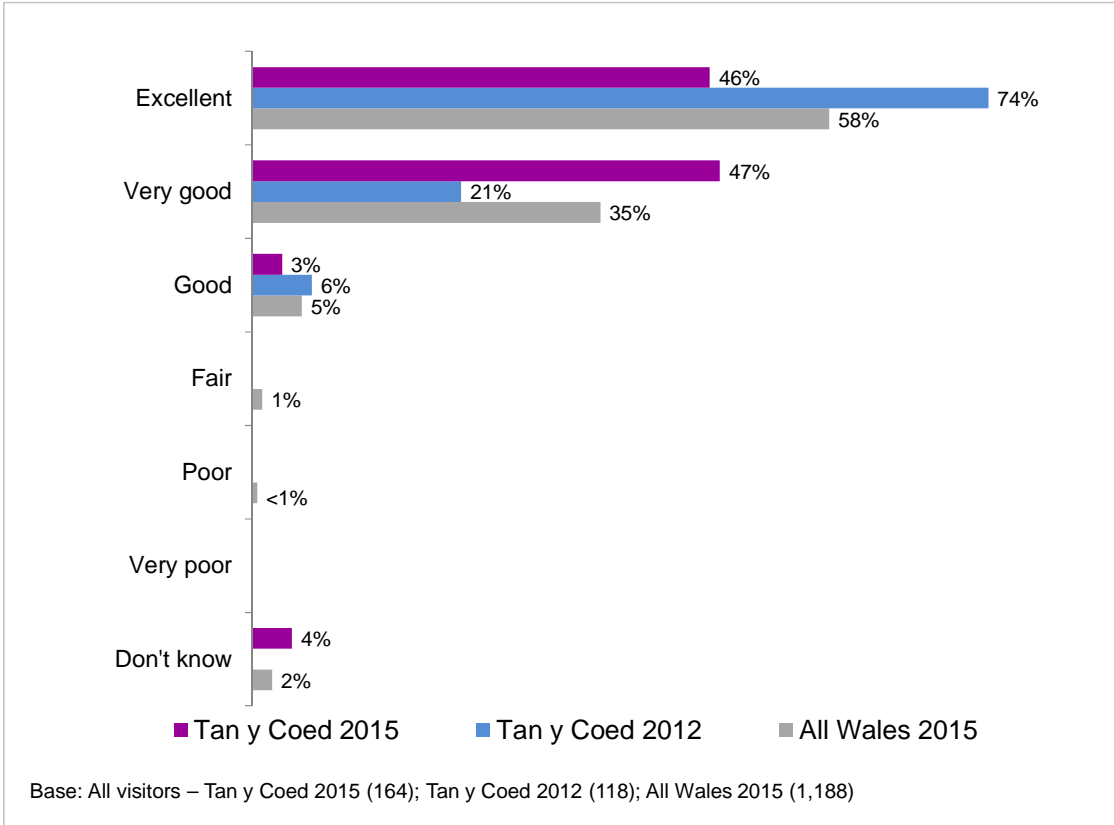
### 5.1 Overall rating of the site as a place to visit

Perceptions of Tan y Coed as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Tan y Coed in gave a negative rating of the site.

However, opinions of Tan y Coed were less enthusiastic in 2015 compared to 2012. Just under half (46%) rated the site as 'excellent'; considerably lower than the data from the 2012 survey (74%) and slightly lower than the all Wales figure (58%). A further 47% gave the site a rating of 'very good' and 3% rated it as 'good'.

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 93%, comparable to the 2012 figure of 95% – see Figure 9 below.

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



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

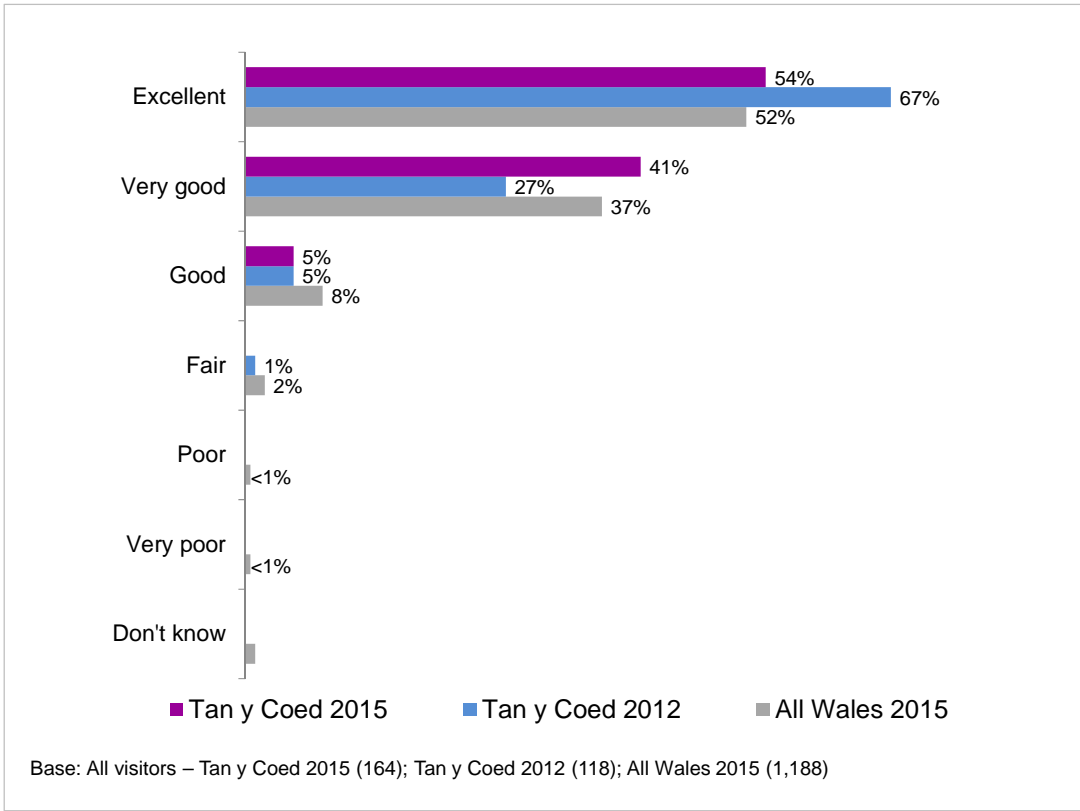
Similarly, ratings of how safe and welcoming Tan y Coed felt were also positive, although less so than was seen in 2012. Again, none of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just over half of visitors gave this measure an ‘excellent’ rating (54%); this was in line with figure obtained for all Wales sites (52%), but lower than the findings from the 2012 survey (67%).

Another two fifths (41%) gave a ‘very good’ rating for how safe and welcoming Tan y Coed felt (higher than both the all Wales and 2012 figures). One in twenty (5%) gave a ‘good’ rating.

Therefore, the proportion giving the site an ‘excellent / very good’ rating in 2015 stood at 95%, comparable to the 2012 figure of 94% – see Figure 10 below.

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



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

Table 7 below details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Tan y Coed and all Wales sites.

Two aspects of the site that stood out were the peaceful, tranquil and relaxing atmosphere, and the fresh air and open spaces at the site; both of these were mentioned by over half of visitors giving a positive rating of the safety of the site (57% and 52% respectively). Another half of visitors mentioned how the site was clean and well laid out (49% and 46% respectively). Each of these four aspects was mentioned around twice as many visitors to Tan y Coed than across all sites in general in Wales. Moreover, none of the visitors interviewed in 2012 mentioned the peace, space or layout of the site.

Another two fifths of visitors to Tan y Coed spoke of the scenery (41%) and good provision of paths (38%), with a similar proportion simply stating that the site provided a safe environment (40%). Smaller proportions mentioned the good facilities at the site (15%), with specific reference being made to the toilets (3%) and parking (2%) - see Table 7 below for more details.

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

Reasons for a positive rating of site	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Peaceful / pleasant / tranquil / relaxing / welcoming	57	-	34
Fresh air / open space / freedom	52	-	24
Clean / tidy / well maintained / litter free	49	14	23
Well laid out / well organised / good set up	46	-	27
The scenery / views / beautiful environment	41	5	40
Safe environment generally	40	-	38
Good provision of paths, trails and tracks	38	5	21
Well signposted / good maps / information boards	36	10	26
Good, safe place for the kids to play and run around	16	-	14
Good quality facilities or amenities	15	24	12
Other visitors here are friendly	11	-	10
Live locally / convenient / easy to get to / close	10	5	5
Good toilets / plenty of toilets	3	-	<1



Reasons for a positive rating of site continued ..	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Good car parking (good with horse box)	2	-	3
Don't know	2	-	3
General positive comments	2	23	3
Some negative comments	4	-	5

Base: Visitors rating the site as excellent, very good or good – Tan y Coed 2015 (164); Tan y Coed 2012 (79); All Wales 2015 (1,175)

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

- Away from roads / no cars / cars drive slowly
- Friendly / helpful staff and rangers
- Easily accessible for wheelchairs / pushchairs.

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

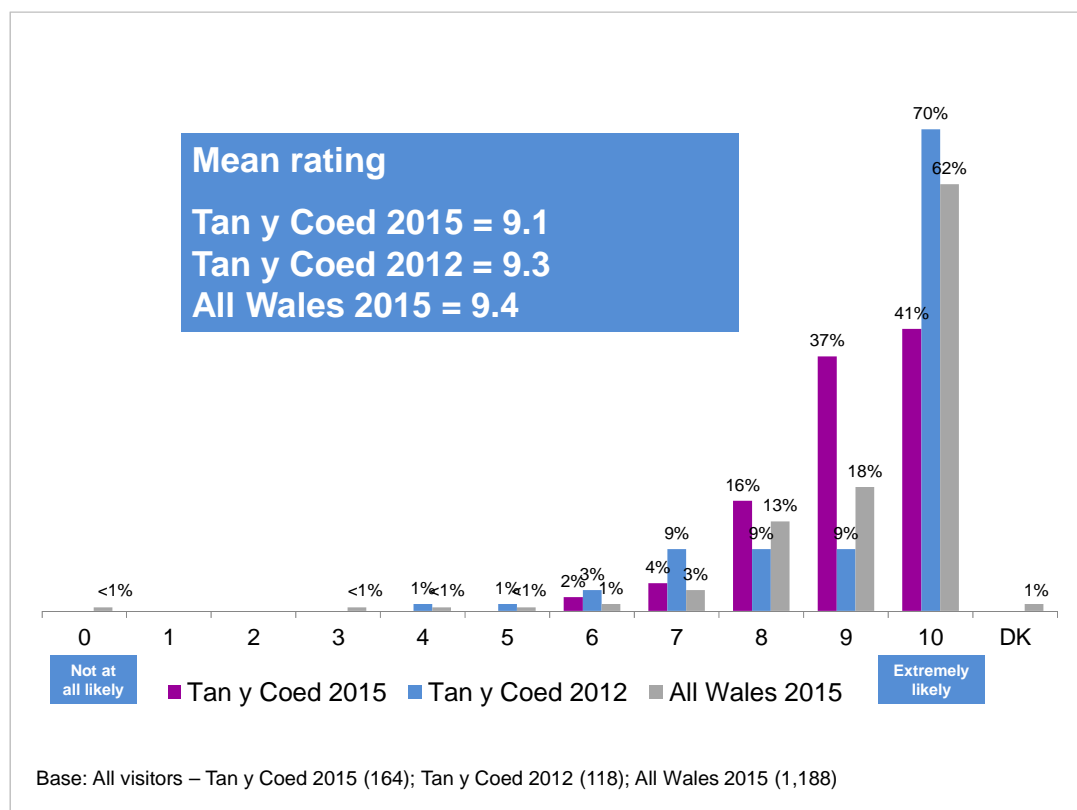
Visitors were asked whether they would be likely to recommend Tan y Coed as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Tan y Coed and all Wales sites generally were extremely positive: only 6% gave a rating of less than 8/10 for Tan y Coed, which was lower than the 2012 position, when 14% of visitors gave a rating of less than 8/10.

Saying that, more people tended to give ratings of 8/10 or 9/10 at Tan y Coed in 2015 (53%) compared to the previous survey (18%) or the all Wales average (31%). Therefore while there were fewer negative ratings at this site than was seen previously, the proportion giving the highest rating of 10/10 dropped from 70% in 2012 to 41% in 2015 (also lower than the all Wales average of 62%).

Reflecting the change in the distribution of scores, the mean rating for Tan y Coed stood at 9.1, lower than both the 2012 average rating of 9.3 and the all rating of Wales at 9.4 – see Figure 11 overleaf.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Tan y Coed is 76, which is in line with the both the all Wales score of 79 and the 2012 NPS score of 74 for this site.

## 5.4 Strengths of the site

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

Fairly high numbers of visitors mentioned aspects of the site that they liked, and no one aspect stood out as being favoured over any others. Around half of visitors mentioned the peace and beauty of the site (51% and 49% respectively), with slightly smaller proportions mentioning the fresh air (47%), cleanliness (45%) and walk, paths and trails at Tan y Coed (41%). Most of these figures were in line with both the 2012 survey and the all Wales data, with the exception of fresh air / being outside (only 10% in 2012 cf. 47% in 2015).

Roughly three in ten liked the opportunity to exercise and keep fit at the site (30%), and well as the variety of trees and plants (26%); exercising was not mentioned at all in 2012 – see Table 8 below for more details.

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

Favourite things about the site	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Peace / tranquillity / relaxation / atmosphere	51	53	56
Scenery / views / beautiful/ natural / non-commercial	49	41	62
Fresh air / being outside	47	10	24
Clean / well looked-after	45	30	16
Walks / paths / trails	41	31	42
Exercise / keeping fit	30	-	15
Like forests / trees / variety of trees / plants	26	16	16
Been before / wanted to come again	25	3	12
Safe environment	24	9	9
Good on-site facilities / BBQ areas / Gift Shop	21	36	9
Close to home / convenient / location	20	6	16
Wildlife / bird watching	15	8	21
Ideal for dogs / dog friendly / safe for dogs	8	-	2
Lots to see and / or do	7	-	5
Good toilets	7	-	1
Activities that are good for the children	6	8	9
Opportunity to spend time with family / friends / family friendly	5	-	6
The weather	5	-	3
Rivers / creeks / waterways / waterfalls	4	6	10

Favourite things about the site	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Cycle trails / opportunity / freedom to cycle	3	-	2
Plenty / cheap / other reference to parking	3	4	3
Well laid out / good layout	2	-	1
Not crowded / not too many people	2	-	1
Cost / value for money / cheap / free	2	-	2
Well signposted / good maps / information boards	2	-	2
Nothing	-	-	<1
Don't know	1	1	<1

Base: All visitors – Tan y Coed 2015 (164); Tan y Coed 2012 (118) All Wales (1,188).

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

- Good accessibility
- Open space / plenty of space
- Something for everyone.

## 5.5 Areas for improvement

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

Turning firstly to what would enhance their enjoyment of the site; at Tan y Coed, the majority of visitors felt that nothing could be improved and only gave positive comments (70%). This was higher than the all Wales average of 53%, indicating that fewer visitors had any issues with the site compared to all sites in general across Wales (30% saying something could be improved cf. 47% overall).

Amongst the comments received (albeit by small numbers of visitors), most called for more dog poo bins, and for dog poo to be cleaned up (7%). Another 5% would like to see the provision of a café, restaurant or other catering, while 4% would simply like better weather for their trip – see Table 9 overleaf.

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

Suggested improvements	Tan y Coed 2015 %	All Wales 2015 %
<b>Nothing / general positive comments</b>	<b>70</b>	<b>53</b>
More dog poo bins / remove dog poo	7	9
Provide café / catering / refreshments	5	4
Better weather / more sunshine	4	2
Longer / more challenging trails, paths and cycle routes	3	1
Improve maintenance of paths / cycle tracks / better surfacing	2	2
More information on wildlife / vegetation / area	2	2

Base: All visitors – Tan y Coed 2015 (164); All Wales (1,188).

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

- More activities for children / more play areas
- Improve signage / more maps / better maps
- More bins / litter bins / recycling bins / less litter
- More seating
- Better access / make more accessible (including disabled access)
- Better parking (easier, more, cheaper, free)
- More picnic areas / BBQ / picnic tables and benches
- Better public transport / shuttle bus to the site
- Drinking water taps
- Negative comments about access for dogs.

In 2012, nearly eight in ten (78%) said ‘nothing’ would enhance the enjoyment of their visit. Only a fifth (22%) mentioned anything, with no one aspect coming through particularly strongly. Aspects mentioned by 3 or more respondents were:

- Café / refreshments / catering (5 respondents)
- Cleaner environment (3 respondents)
- Better / more trails (3 respondents).

Returning to the recent research; when asked if there was anything that interfered with their enjoyment of their visit to Tan y Coed, the vast majority (82%) reported that nothing had. This was higher than the proportion saying the same at all Wales sites (68%), again illustrating that visitors to Tan y Coed found fewer issues with this site compared to all Wales sites in general.

Amongst the small number of comments received, poor weather was mentioned by most visitors (9%); other comments (from 2% each of visitors) related to dog poo on the paths and in the play areas, unclear signage and motorcyclists being on paths (or cars too close to the road) – see Table 10 below.

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

Problem areas	Tan y Coed	All Wales
	2015 %	2015 %
<b>Nothing</b>	<b>82</b>	<b>68</b>
Wet / raining / windy (poor weather)	9	8
Dog mess on the paths / in play areas	2	4
Signs unclear / need better signs / more maps	2	3
Motorcyclists on paths / cars too close to the path	2	<1

Base: All visitors – Tan y Coed 2015 (164); All Wales (1,188).

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

- Some paths are difficult/dangerous (steep drops, loose shale, steep for kids)
- Dogs off leads / loose dogs / don't want dogs around
- Need more litter bins / recycling bins / too much litter
- Noisy (low flying aircraft / jets or road)
- Poor maintenance of site (paths, fences, waterways)
- Need more dog poo bins
- No café
- Midges.

In 2012, only 2 respondents provided a specific response to this question:

- Dog fouling / lack of dog bins (1 respondent);
- Logging activities / trees left lying around (1 respondent).

## 6. Site facilities

### 6.1 Importance of site facilities

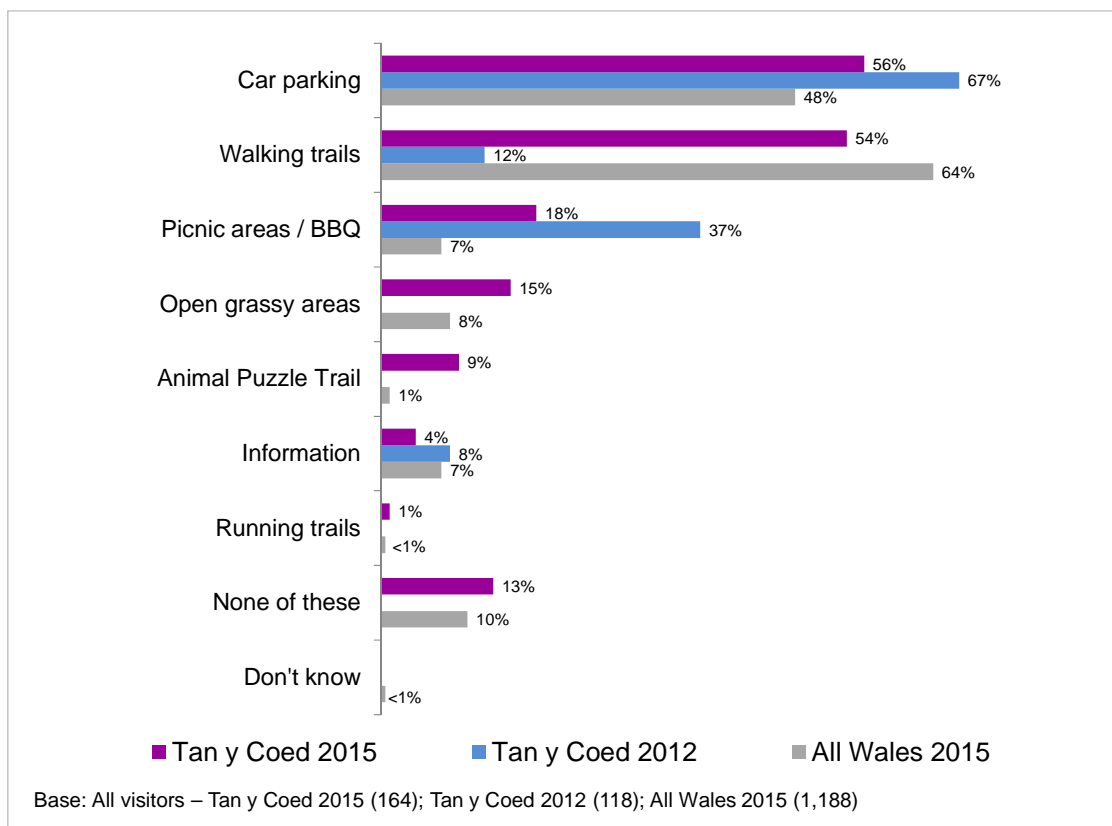
Visitors were presented with a list of facilities available at Tan y Coed and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

On the whole, there were many more comments received in 2015 compared to 2012. Car parking and walking trails were mentioned as being important to their choice to visit by most visitors (56% and 54% respectively); these were by far the most commonly mentioned facilities. While walking trails were only mentioned by 12% of visitors in 2012, car parking was mentioned by 67%.

Fewer people said that the picnic / BBQ areas were important in 2015 (18%) compared to 2012 (37%), but more people put importance on the open grassy areas (15%), Animal Puzzle Trail (9%), and running trails (1%); none of these facilities were mentioned in 2012.

Compared to all Wales sites surveyed in 2015, walking trails were deemed less important at Tan y Coed, but car parking, picnic areas, open grassy areas and the Animal Puzzle trail were deemed more important – see Figure 12 below.

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



Certain other factors (apart from site facilities) were important to around three quarters of visitors when choosing to come to the site (74%); those mentioned by more than 2% of visitors are outlined below. For all aspects mentioned, there were more comments on these received at Tab y Coed compared to all sites in general across Wales.

The fact that people were just passing was mentioned by a quarter of visitors (23%), while for a fifth of visitors, the good facilities at the site had been important to their decision to visit (18%). Around one in six said that they had wanted to go walking or cycling, of that they liked the dog-friendly nature of the site (13% for each). Just under one in ten (8%) said that the beauty at the site was an important factor in their decision to visit.

The convenience of the location (being close to home), and the children's play areas were mentioned by 7% of visitors – see Table 11 below for more details.

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

Spontaneous mentions	Tan y Coed	All Wales
	2015 %	2015 %
<b>Nothing</b>	<b>26</b>	<b>53</b>
Was just passing by / en route / was in the area	23	5
Good facilities	18	4
Dog friendly / dogs can come off leads / dog facilities	13	4
Wanted to go walking / cycling	13	4
Beautiful scenery / views / natural beauty	8	4
Good for the children / children like it / can run around and play	7	3
Live locally / convenient / easy to get to / easy access / close to me	7	5
Relaxing / peaceful / tranquil / quiet	5	2
A day out / a nice, good day out	2	1
Friend / family / owner of B&B recommended it / word of mouth	2	2
Outdoors / fresh air / open spaces	2	2
Been before / come here a lot / good memories	2	2
Close to where I am staying (staying visitors) / parents live locally	2	3
Easy to find / get to (transport links, signposting, shuttle bus to site)	2	1

Base: All visitors – Tan y Coed 2015 (164); All Wales (1,188)



Other factors were mentioned by one or two visitors:

- Bad weather / wet / windy / cold
- Meeting / visiting with friends / family (bring family)
- To see wildlife / birdwatching (inc. feeding the birds)
- Negative comments / recommendations
- Had some free time (over Easter / Bank Holiday)
- Not too busy
- Easily accessible / easy to get around (wheelchair access)
- Good parking / cheap / free
- Something different / a change.

## **6.2 Facilities used**

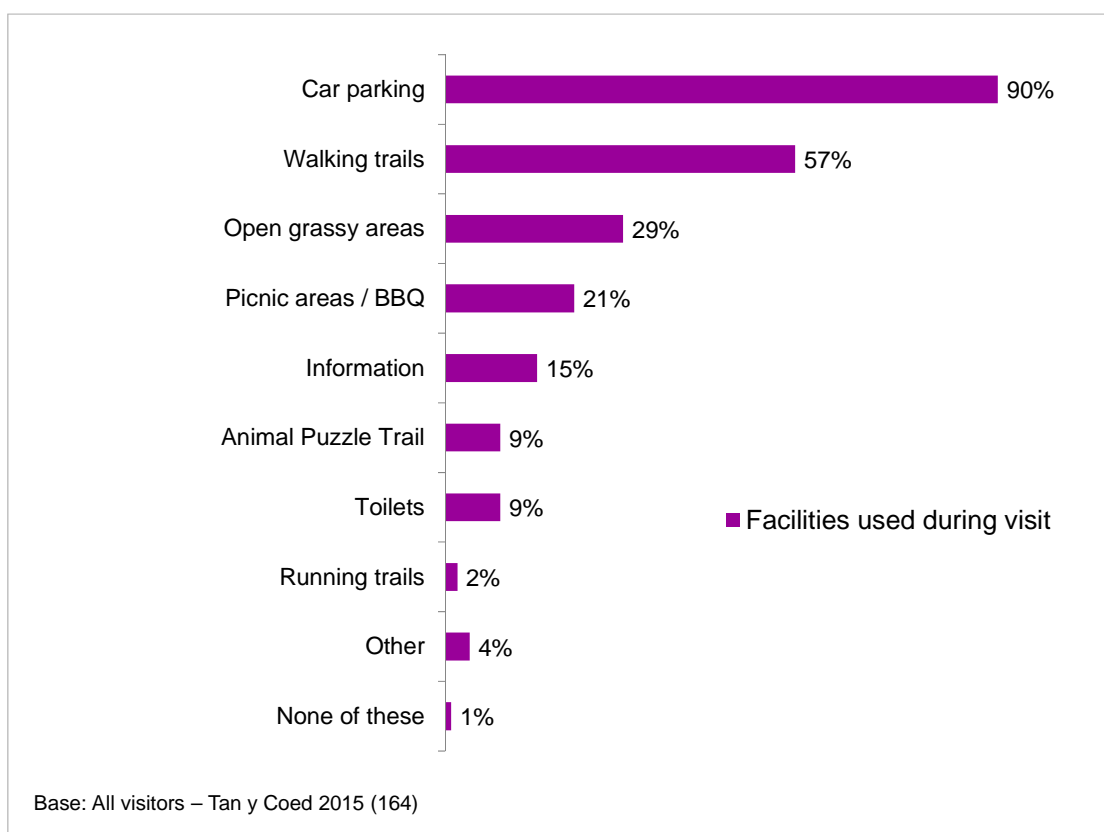
Visitors were then presented with the same list, and asked which facilities they had used during their visit.

The facilities used reflected to a large extent visitors' views of the importance of facilities. Car parking was used by the vast majority of visitors (90%); this was by far the most commonly used facility.

Walking trails were used by around six in ten visitors (57%), while three in ten used the open grassy areas (29%). Another fifth used the picnic / BBQ areas (21%).

Around one in ten mentioned using the information at the site (15%), the Animal Puzzle Trail and the toilets (9% for each). Only a very small minority of 2% used the running trails - see Figure 13 overleaf for more details.

**Figure 13: Q15a. Facilities used at Tan y Coed 2015**



### 6.3 Rating of site facilities

Visitors were then asked to rate the facilities they had used. The ratings for the facilities used by 30 or more visitors to Tan y Coed have been detailed in Figure 14 below. Ratings of most of the facilities were positive, with the vast majority giving a positive rating of either ‘excellent’, ‘very good’ or ‘good’; nobody gave a negative rating for any of the facilities outlined.

The feature that received the highest score was the open grassy areas; nearly nine in ten ‘users’ rated these as ‘excellent’, with another 9% rating them as ‘very good’. The remaining 2% rated them as ‘good’.

Just under eight in ten gave an ‘excellent’ rating for the car parking and walking trails (78% and 77% respectively), while the picnic / BBQ areas were considered ‘excellent’ by seven in ten (71%) - see Figure 14 overleaf.

**Figure 14: Q15b. Rating of Tan y Coed site facilities (where used) 2015 – main facilities used**

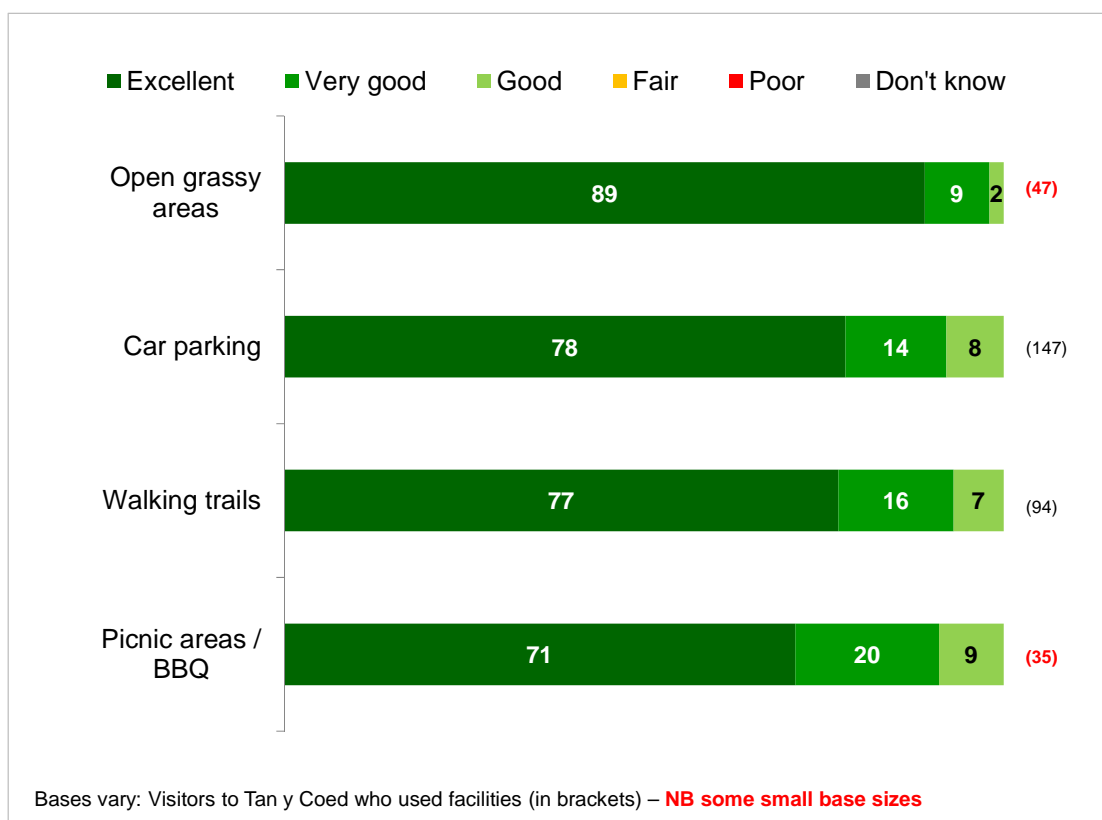


Table 12 compares the proportions giving ‘excellent’ ratings to the facilities used in 2014 compared to 2012, where they were mentioned in the previous survey.

For the two facilities listed, the proportion who gave an ‘excellent’ rating remained fairly stable, with only small increases in the proportions rating the information and car parking as ‘excellent’ (2% and 6% respectively).

**Table 12: Q15b – Proportions rating facilities at Tan y Coed as ‘Excellent’ 2014 vs. 2012**

Facilities	Tan y Coed 2015 %	Tan y Coed 2012 %	% point change
Car parking	78	51	+27
Walking trails	77	42	+35
Picnic areas / BBQ	71	60	+11

Bases vary: visitors using each facility

## 7. Sources of information used to plan visit

Visitors were asked where they found out about Tan y Coed 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.

Around half (55%) of visitors to Tan y Coed had always known about the site; this was a slight increase on the 2012 figure (48%) but more in line with the 2015 all Wales data (52%)

Three in ten heard of the site through road signs (29%); while only slightly higher than the 2012 figure (20%), this was much higher than the all Wales average of 6%. Relating to this, 20% said they came across the site when passing, again in line with 2012 (19%) but higher than all Wales (5%).

Smaller proportions of visitors mentioned maps (6%), leaflets and word of mouth (5% for each) - see Table 13 below.

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

Sources of information	Tan y Coed 2015 %	Tan y Coed 2012 %	All Wales 2015 %
Always known about it / been here before	55	48	52
Road signs	29	20	6
Just passing / en route	20	19	5
Map	6	2	4
Leaflet	5	-	4
Word of mouth	5	9	21

Base: All visitors – Tan y Coed 2015 (164); Tan y Coed 2012 (118) All Wales (1,188).

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

- Live locally
- Newspaper
- Tourist information Centre
- Google / other search engine
- Mountain Biking Wales website
- Book / guide book.

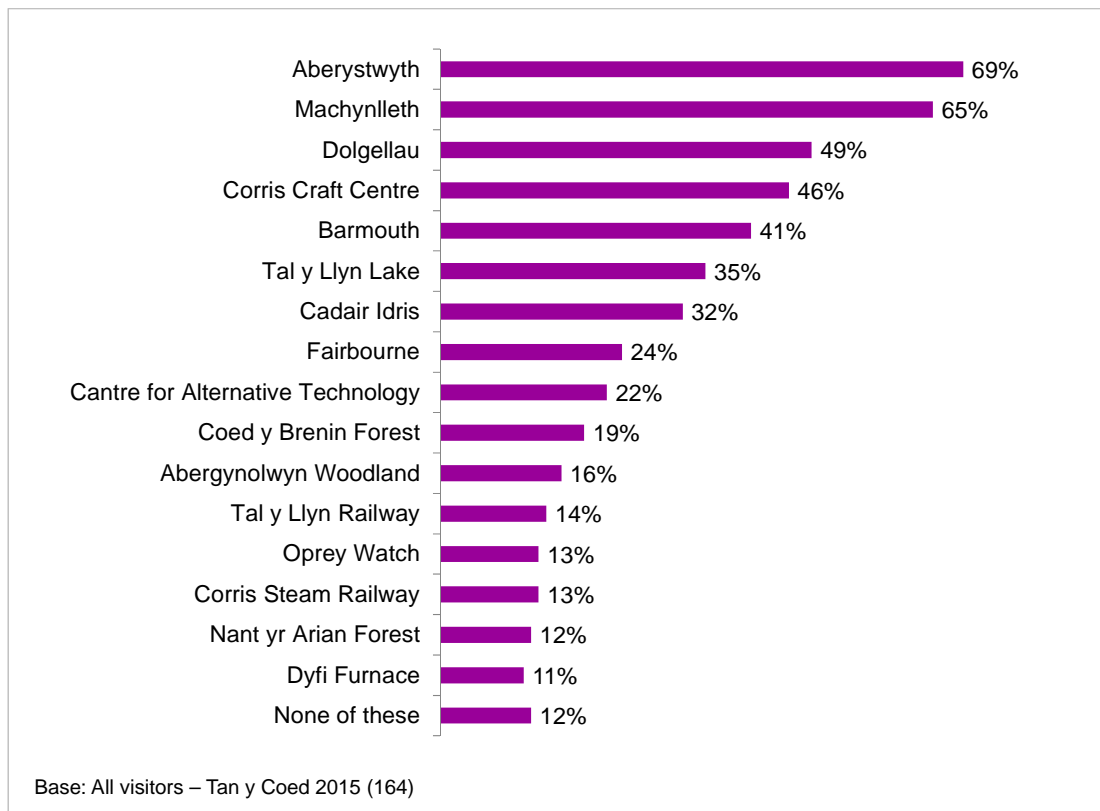
## 8. Visiting other areas and attractions

Visitors to Tan y Coed were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months: the vast majority of visitors (88%) had visited at least one.

Aberystwyth and Machynlleth were mentioned by the highest proportions of visitors to Tan y Coed (69% and 65% respectively), while half spoke of Dolgellau (49%) and Corris Craft Centre (46%). Another two fifths had visited Barmouth (41%).

Tal y Llyn Lake and Cadair Idris had been visited by around a third of visitors to Tan y Coed (35% and 32% respectively), with another quarter mentioning Fairbourne (24%) and the Centre for Alternative Technology (22%) - see Figure 15 below for more details.


**Figure 15: Q19. Other areas / attractions visited 2015**



## Appendix I

### Questionnaire

---

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

**APPROACH ADULTS AGED 16+ - READ OUT**

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

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

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

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

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

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

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

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

(7)
1
2
3

**IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW**

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

- English
- Welsh

(8)
1
2

**ASK ALL**

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

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

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

**SHOWCARD A**

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

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

(17)  
1  
2  
3  
4  
5

**SHOWCARD B**

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

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

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



**ASK ALL**

**SHOWCARD C**

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

**PROBE** - Any others?

**RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED**

**ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP**

**SHOWCARD C AGAIN**

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

**RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED**

**ASK ALL**

**SHOWCARD C AGAIN**

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

**RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED**

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

**ASK ALL**

**SHOWCARD D**

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

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

Don't know

(45)

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

**INSTRUCTIONS:**

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

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

**SHOWCARD D AGAIN**

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

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

**ASK ALL**

**SHOWCARD E**

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

**ASK ALL**

**Q9** What, if anything, would enhance your enjoyment of this site? (75-78m)  
**PROBE** Anything else?  
**DO NOT PROMPT – CODE ALL MENTIONED**  
**IF MENTIONS WEATHER, PROBE FOR MORE DETAILS**

- Better parking (easier, more, cheaper, free) 1
- Improve toilets / more toilets / shower facilities / changing area 2
- More activities for children / more play areas 3
- More trails / paths / cycle tracks 4
- Improve signage / more maps / better maps 5
- Improve café / catering 6
- More dog poo bins / remove dog poo 7
- More bins / litter bins / recycling bins 8
- Longer / more challenging trails, paths and cycle routes 9
- More seating A
- More picnic areas / BBQ / picnic tables and benches B
- Improve maintenance of paths / cycle tracks / better surfacing C

**Other (please specify)** (79-82m)

-----  
 -----

- Nothing L
- Don't know M

**Q10** What, if anything, interfered with your enjoyment of this site today? (83-86m)  
**PROBE** Anything else?  
**DO NOT PROMPT – CODE ALL MENTIONED**  
**IF MENTIONS WEATHER, PROBE FOR MORE DETAILS**

- Wet / raining / windy (poor weather) 1
- Car parking expensive 2
- Signs unclear / need better signs / more maps 3
- Problems with car parks 4
- Poor service in café / long queues / inconvenient opening hours 5
- Too busy 6
- Dogs off leads / loose dogs / don't want dogs around 7
- Toilets – not enough / closed / out of order 8
- Need more litter bins / recycling bins / too much litter 9
- Dog mess on paths / in play areas A

**Other (please specify)** (87-90m)

-----  
 -----

- Nothing L
- Don't know M

**ASK ALL**

**SHOWCARD F**

**Q11** How would you rate the site in terms of how safe and welcoming it feels?  
**SINGLE CODE**

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

Don't know / not sure

(95)

1 }  
2 } **Q12**  
3 }  
4 }  
5 }  
6 }  
7 → **Q13**

**ASK Q12 IF CODED 1-6 AT Q11**

**Q12** What are the reasons for your rating? **PROBE** Anything else?  
**DO NOT PROMPT – CODE ALL MENTIONED**

- The scenery / views / beautiful environment
- Peaceful / pleasant / tranquil / relaxing
- Fresh air / open space
- Safe environment generally
- Good, safe place for the kids to play and run around
- Clean / tidy / well maintained / litter free
- Well signposted / good maps / info boards
- Well laid out / well organised / good set up
- Other visitors here are friendly
- Good quality facilities or amenities
- Good provision of paths, trails and tracks
- Friendly / helpful staff or rangers
- Live locally / convenient / easy to get to

(96-99m)

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

**Other (please specify)**

-----  
-----

(100-103m)

Don't know

M

# TAN Y COED

## ASK ALL

### SHOWCARD G7

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

**CODE ALL MENTIONED**

		(105-108m)
A	Animal Puzzle Trail	1
B	Audio Trail	5
C	Car parking	C
		(109-112m)
D	Horse riding	4
E	Information available / interpretation	5
F	Open grassy areas	9
G	Picnic areas / BBQ	C
H	Running trails	G
I	Walking trails	O
		(113-116m)

None of these  
Don't know

M  
N

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

**PROBE** Anything else?

**RECORD VERBATIM**

---



---



---

(117-120m)

(121-124m)

Nothing  
Don't know

M  
N

# TAN Y COED

## ASK ALL

### SHOWCARD G7 AGAIN

**Q15a** Which aspects of the site have you used during your visit today? **PROBE** Any others?  
**RECORD IN COLUMN A – CODE ALL MENTIONED**

### SHOWCARD H

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

FOU: (140-231 FOR Q15)

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

ASPECTS USED	Q15a COL. A	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
	CIRCLE IF USED	Excellent	Very good	Good	Fair	Poor	Very poor	DK	
	(125-128m)								
A Animal Puzzle Trail	1	1	2	3	4	5	6	7	(140)
B Audio Trail	5	1	2	3	4	5	6	7	(144)
C Car parking	C	1	2	3	4	5	6	7	(151)
	(129-132m)								
D Horse riding	4	1	2	3	4	5	6	7	(167)
E Information available / interpretation	5	1	2	3	4	5	6	7	(168)
F Open grassy areas	9	1	2	3	4	5	6	7	(172)
G Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
H Running trails	G	1	2	3	4	5	6	7	(179)
I Walking trails	O	1	2	3	4	5	6	7	(187)
	(133-136m)								
<b>OTHERS (WRITE IN)</b>									
		1	2	3	4	5	6	7	( )
		1	2	3	4	5	6	7	( )
		1	2	3	4	5	6	7	( )

None of these  
Don't know

M  
N

**ASK ALL**

**SHOWCARD H AGAIN**

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

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

Don't know / not sure

(235)

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

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

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

(236)

**SHOWCARD I**

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

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

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

**SHOWCARD J**

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

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

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



# TAN Y COED

FOU: (335-369 FOR Q19)

## ASK ALL

### SHOWCARD K7 (W)

**Q19** Looking at this card, can you tell me which, if any, of these places you have visited in the last 12 months?

**CODE ALL MENTIONED**

- Abergynolwyn Woodland
- Aberystwyth
- Barmouth
- Cadair Idris
- Centre for Alternative Technology
- Coed y Brenin Forest
- Corris Craft Centre
- Corris Steam Railway
- Dolgellau (town)
- Dyfi Furnace
- Fairbourne
- Machynlleth (town)
- Nant yr Arian Forest
- Osprey Watch (nr Machynlleth)
- Tal y Llyn Lake
- Tal y Llyn Railway
  
- None of these
- Don't know

(365-368m)

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- A
- B
- C
- D
- E
- F
- G
  
- L
- M

FOU: (370-410 FOR Q20)

**NO Q20 FOR TAN Y COED**

**ASK ALL**

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

**Q21 INTERVIEWER RECORD GENDER**

- Male
- Female

(415)  
1  
2

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

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

Refused

(416)  
1  
2  
3  
4  
5  
6  
7

**SHOWCARD M**

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

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

Refused

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

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

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

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

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

- AB
- C1
- C2
- DE

Refused

(418)  
1  
2  
3  
4  
5

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

**ASK Q28a AT ENGLAND SITES ONLY**

**SHOWCARD O (E) AND PURPLE ENGLAND MAP**

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

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

- Wales
- Scotland
- Northern Ireland
- Abroad

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

Refused

(425)

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

- A
- B
- C
- D

X

Z

**ASK Q28b AT WALES SITES ONLY**

**SHOWCARD O (W) AND WALES MAP**

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

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

- England
- Scotland
- Northern Ireland
- Abroad

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

Refused

(426)

- 1
- 2
- 3
- 4
- 5

- 6
- 7
- 8
- 9

X

Z

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

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

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

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

## Appendix II

### Explanation of social class categories

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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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