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Research Report

Quality of the Visitor
Experience 2014

Crychan



Prepared for:
Natural Resources Wales /
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 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 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 2014, interviews were conducted at 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

This report summarises the findings from the 125 visitor interviews conducted at Crychan in 2014. Throughout the report, comparisons have been made to the previous research conducted in 2011, and the all Wales average (aggregated data from all 7 sites surveyed in 2014).

1.2 Crychan

Crychan Forest is a large easily accessible forest, with many valleys, some with streams and borders a large military firing range. The historic bridge, set on the foot of the valley is the most attractive feature of the forest with a view over the Cambrian Mountains. Its nearest town or village is Llandovery. Crychan and Halfway Forest are criss-crossed with many old tracks and drovers routes. Many miles of horse trails and cycle routes link the four car parks at Brynffo, EsgairFwyog, Cefn Farm and Halfway.

Crychan Forest has a wide variety of activities available to visitors, including cycling and horse riding. Motor cycling competitions are also held there.

1.3 Perceptions of the site

Perceptions of Crychan as a place to visit were very positive and were much improved since 2011. Half of visitors rated the site as 'excellent', which is in line with the all Wales findings (55%) and much higher than the previous study conducted at Crychan in 2011 (23%).

Visitors were similarly positive about how safe and welcoming Crychan was, with again, a big improvement since 2011 in the proportion who rated it as excellent – up to 56% in 2014, from 25% three years ago.

When asked whether they would be likely to recommend Crychan as a place to visit to a friend or relative (using a score of 0-10), scores for Crychan and all Wales sites generally were extremely positive, with an average of 9.1 at Crychan compared with 9.4 across all Wales. This is a strong improvement since 2011 for Crychan, when the average likelihood of recommending the site was just 7.3.

1.4 Strengths of the site

Two favourite things about Crychan stood out. The most mentioned was the peace, tranquillity and relaxing atmosphere (87%) followed by the walks, paths and trails (50%). A further third mentioned the scenery, views and beautiful environment (34%) whilst a quarter just liked the fresh air and being outside (26%).

The forests, trees and plants was the favourite aspect at Crychan for 21% of visitors.

1.5 Areas for improvement

Over two fifths of visitors to Crychan could not think of anything that would add to their enjoyment and only made positive comments (44%) which was very similar to the all Wales average of 46%. The main suggested improvement made related to the toilet / shower / changing facilities which a fifth of visitors felt could be improved on (20%).

Improved signage was mentioned by just under one in ten (9%), the same proportion who wanted more dog poo bins / the dog poo removed. Similarly, 8% requested more litter bins in general / less litter at the site and also improved maintenance of paths and trails. 7% wanted better picnic / BBQ areas and 4% wanted more seating.

1.6 Visitor profile

Over four in ten visitors to Crychan were first time visitors (44%) which is significantly more than the all Wales average (29%). Consequently, fewer than average visitors to Crychan were repeat visitors (56%) than seen on average across all Wales sites (71%).

Six in ten (62%) visitors to Crychan were day trippers whilst 38% were staying visitors, which is similar to the all Wales average. A slight majority had travelled for less than 3 hours for their day trip (56% of all visitors).

Group sizes were smaller at Crychan (2.5 people) than the average across all Wales sites (3.3 people) with most people visiting in a group of two (62%). Relatively few visitors came there with children (20% compared to 37% all Wales).

The demographic profile of visitors to Crychan was largely in line with that of the visitors to all the Wales sites.

There was a completely even gender profile at Crychan – 50% male, 50% female, which is similar to the all Wales average of 53% male, 47% female.

In terms of age, Crychan visitors were again similar to the all Wales average, with almost four in ten (38%) aged 16-44, and a little over six in ten aged 45+ (63%). The profile for working status was also in line with the all Wales data, with most working full-time (58%) although more than average were self-employed at Crychan (15% vs. 7%).

As with all Wales sites, Crychan visitors tended more towards the ABC1 socio-economic groups (professional and non-manual working = 71%), than C2DE (semi-skilled, unskilled and non-working = 29%).

Just over a quarter (26%) of Crychan visitors had children in the household, which was slightly lower than the all Wales figure (34%).

The majority of visitors to Crychan were White British / Welsh / Irish (95%), with only a small number of visitors describing their ethnicity as 'White other nationality' (5%) and none were 'Black / Asian / Mixed'.

Just a fifth of visitors to Crychan spoke Welsh (21%), 9% fluently and 12% non-fluently, which is again in line with the all Wales average.

2. Introduction

2.1 Background

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

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

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

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

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

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

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

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

2.2 Research programme

Between 2013 and 2015, Beaufort Research will conduct approximately 9,000 interviews with visitors to forests, woodlands and National Nature Reserves across England and Wales. In 2014, a total of 2,808 interviews were conducted: 1,654 in England and 1,154 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 11 high usage sites (7 in England and 4 in Wales) and 3 medium usage sites (all in Wales).

Table 1 below details the sites surveyed in 2014, 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
Bedgebury	236	Alwen (M)	133
Delamere	240	Bwlch y Nant yr Arian (H)	190
Forest of Dean	230	Clocaenog (M)	136
Hamsterley	234	Coed y Brenin (H)	205
High Lodge, Thetford Forest	246	Cors Caron (H)	176
Salcey	239	Crychan (M)	125
Whinlatter	229	Garwnant (H)	189
TOTAL	1,654	TOTAL	1,154

* 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 ran from March to October 2014. At Crychan, interviewing took place between 29th March and 12th October, and a total of 125 interviews were conducted.

2.3 Report

This report summarises the results of the interviews undertaken at Crychan in 2014, 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 2011 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 were visiting Crychan. Table 2 overleaf details the profile of visitors, compared with the profile of visitors to all sites surveyed in Wales in 2014. The demographic profile of visitors to Crychan was largely in line with that of the visitors to all the Wales sites.

There was a completely even gender profile at Crychan – 50% male, 50% female, which is similar to the all Wales average of 53% male, 47% female.

In terms of age, the Crychan visitors were again similar to the all Wales average, with almost four in ten (38%) aged 16-44, and a little over six in ten aged 45+ (63%). Across Wales, the split was 42% aged under 45 and 58% aged 45+.

The profile for working status of visitors to Crychan was also in line with the all Wales data, with most working full-time (58% Crychan; 56% all Wales), although more than average were self-employed at Crychan (15% vs. 7%).

As across most sites, Crychan visitors tended more towards the ABC1 socio-economic groups (professional and non manual working) than C2DE (semi skilled, unskilled and non working). The proportion in each main group was virtually the same as the all Wales average – 71% ABC1, 29% C2DE, although Crychan did pick up slightly more ABs than average (43% vs. 38%) and less C1s (28% vs. 34%).

Just over a quarter (26%) of Crychan visitors had children in the household, which was slightly lower than the all Wales figure (34%).

The overwhelming majority of visitors to Crychan were White British / Welsh / Irish (95%), with only a small number of visitors describing their ethnicity as 'White other nationality' (5%) and none were 'Black / Asian / Mixed'.

A fifth of visitors to Crychan spoke Welsh (21%): 9% fluently and 12% non-fluently. This is in line with the all Wales average of 22% Welsh speakers (11% fluent, 11% non-fluent) – see Table 2 overleaf for more details.

Table 2: Profile of visitors by key demographics 2014

		Crychan %	All Wales %
Gender	Male	50	53
	Female	50	47
Age	16 - 24	2	3
	25 - 34	17	16
	35 – 44	19	23
	45 – 54	26	23
	55 – 64	21	17
	65+	16	17
	Refused	-	<1
Social class	AB	43	38
	C1	28	34
	C2	15	15
	DE	14	12
	Refused	-	1
Working status	Full-time employee (30+ hours per week)	58	56
	Part-time employee (<30 hours per week)	6	10
	Self-employed	15	7
	Full-time education	-	1
	Unemployed	-	1
	Permanently sick / disabled	2	2
	Retired	16	19
	Looking after home	2	2
	Other	-	<1
	Refused	1	1
Limiting illness	Yes – limited a lot	-	4
	Yes – limited a little	7	5
	No	93	90
	Refused	-	1
Children in household	Yes	26	34
	No	74	66
	Refused	-	<1
Ethnicity	White – British / Welsh / Irish	95	96
	White – Other	5	3
	Black / Asian / Mixed	-	1
	Refused	-	<1
Welsh speaker	Yes	21	22
	No	79	78

Base: All visitors – Crychan (125); All Wales (1,154)

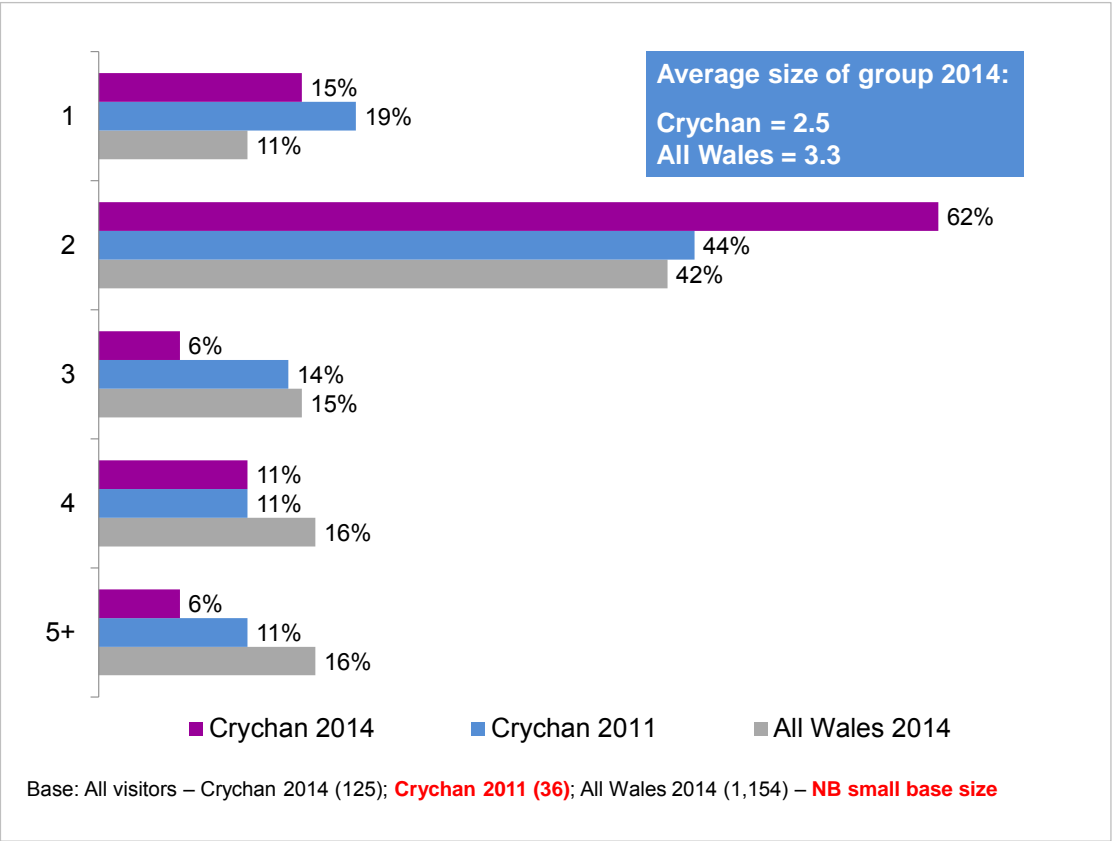
3.2 Group profile

3.2.1 Size of group

Group sizes were smaller at Crychan (averaging 2.5 people), than average across all Wales sites (3.3 people) with most people visiting in a group of two (62%).

In 2011, visitor groups tended to be slightly larger, although there was only a very small sample size at Crychan in 2011 so the data should be treated with caution: 36% of visitors were in groups of 3 or more in 2011, compared with 23% in 2014 - see Figure 1 below:

Figure 1: Q1. Total size of the group



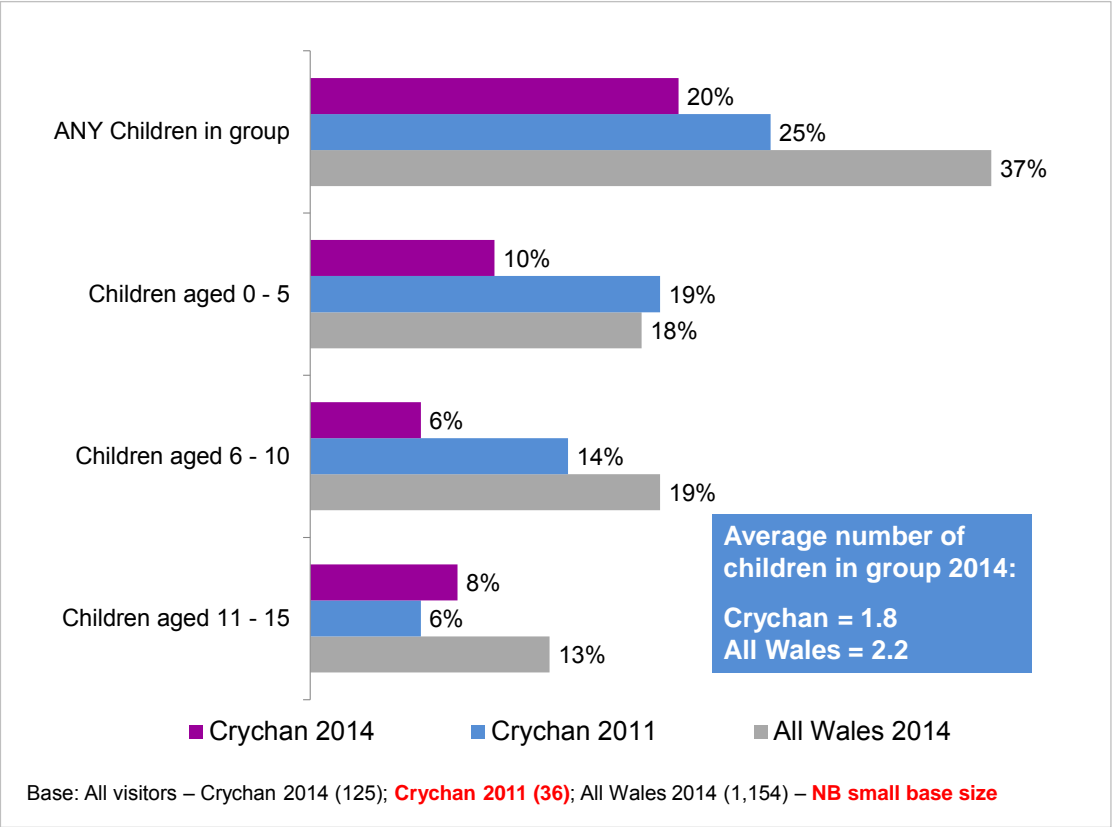
3.2.2 Composition of group

A fifth of visitors were at Crychan with children (20%), which is much lower than the all Wales figure (37%) but similar to the 2011 study at Crychan (25%).

The average number of children per group visiting Crychan in 2014 was 1.8, slightly smaller than the all Wales average of 2.2.

There was little difference in the age profile of children visiting Crychan other than marginally more were aged 0-5 years.

Figure 2: Q1. Composition of group



4. Profile of visit

4.1 Type of visit

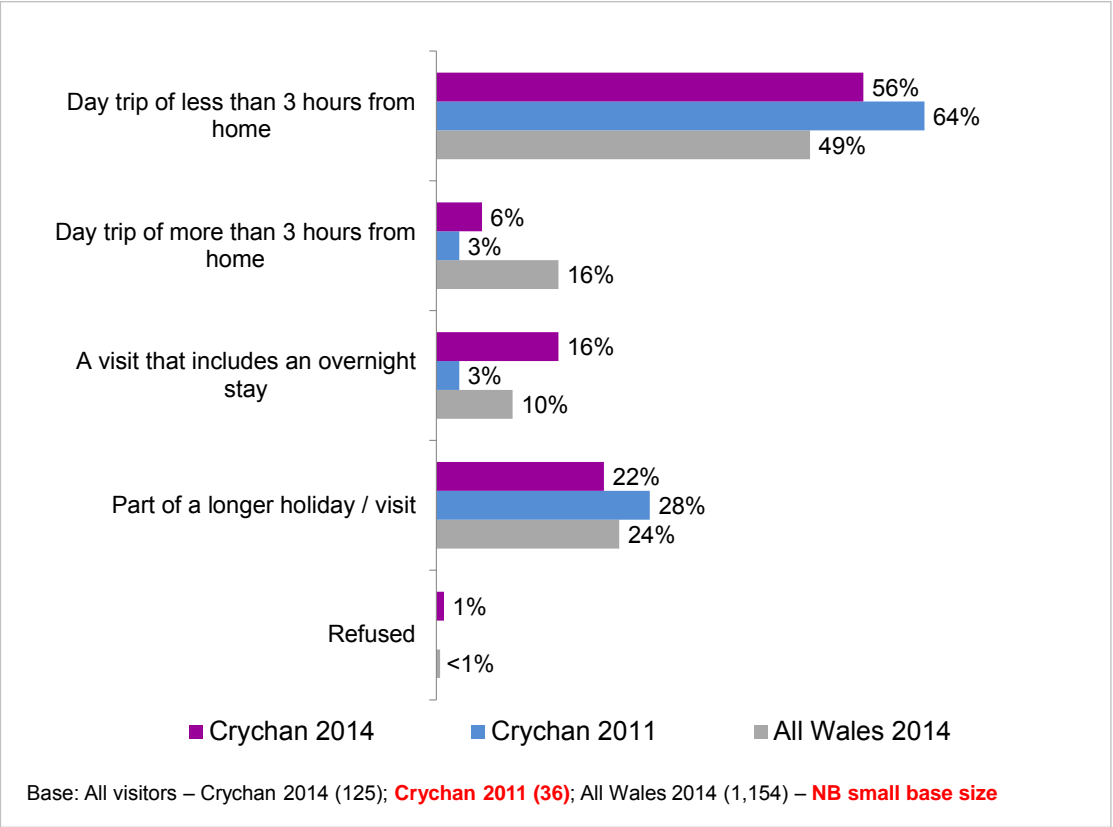
Overall, 62% of Crychan visitors were ‘day trippers’ and 38% were staying visitors. This is very similar to the average across all Wales where 65% were on a day trip and 34% were staying in the area.

Over half of Crychan visitors had travelled for less than three hours for their day trip (56%) which is similar to the proportion of short day trippers picked up in 2011 (64% - bearing in mind the small sample size in 2011) and not dissimilar to the all Wales average (49%).

Just 6% had travelled for more than 3 hours from home for a day trip to Crychan which is somewhat lower than average for all Wales (16%).

Around a quarter of visitors to Crychan were visiting the site as part of a longer holiday to the area (22%), whilst a further 16% were on an overnight stay.

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.

A little under two thirds were visiting from Wales (63%) whilst a third came from England or the rest of the UK (32%): the remaining 5% came from abroad. In terms of the Wales visitors, most came from Mid / West Wales (33%) followed by South West Wales (22%).

Table 3 below and Figure 4 overleaf provide more details:

Table 3: Q28b. Visitor origin 2014

		Crychan	All Wales
		%	%
Home region	North Wales	1	20
	Mid / West Wales	33	21
	South West Wales	22	5
	Valleys	3	10
	South East Wales	5	5
	Outside of Wales	37	40
Home nation	Wales	63	60
	England	31	38
	Rest of UK	1	<1
	Abroad	5	2
	Refused	-	<1

Base: All visitors – Crychan (125); All Wales (1,154)

Figure 4: Map of visitor origin for Crychan



4.3 Frequency of visits

4.3.1 First-time visitors

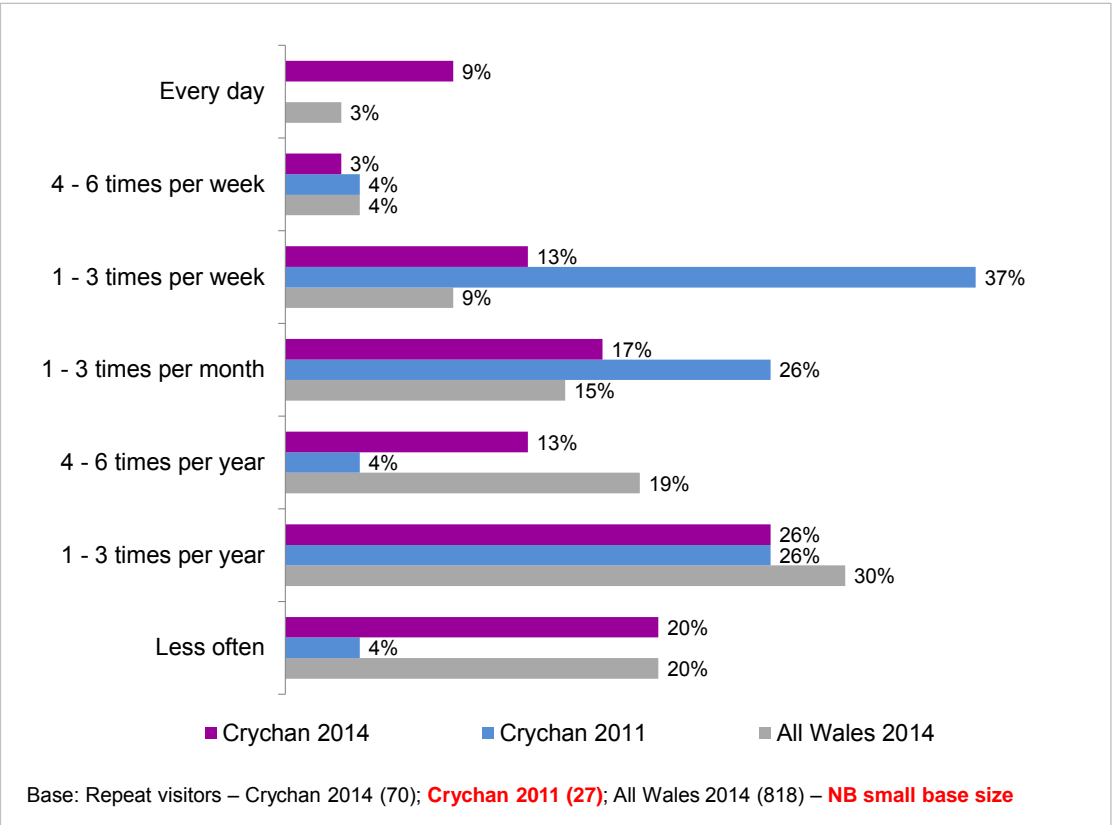
Over four in ten visitors to Crychan were first time visitors (44%) which is significantly more than the all Wales average (29%). Consequently, fewer than average visitors to Crychan were repeat visitors (56% vs. 71% all Wales).

4.3.2 Repeat visitors

Focussing on repeat visitors, most visitors would be classified as infrequent, with 59% visiting less often than once a month. However, with 42% visiting monthly or more often this means Crychan visitors are more frequent than across Wales on average where 69% visit less than once a month and 31% visit more often.

The main difference in visiting frequency at Crychan is in the proportion that says they visit Crychan every day: 9% of repeat visitors claimed to visit daily, compared with 3% across Wales.

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

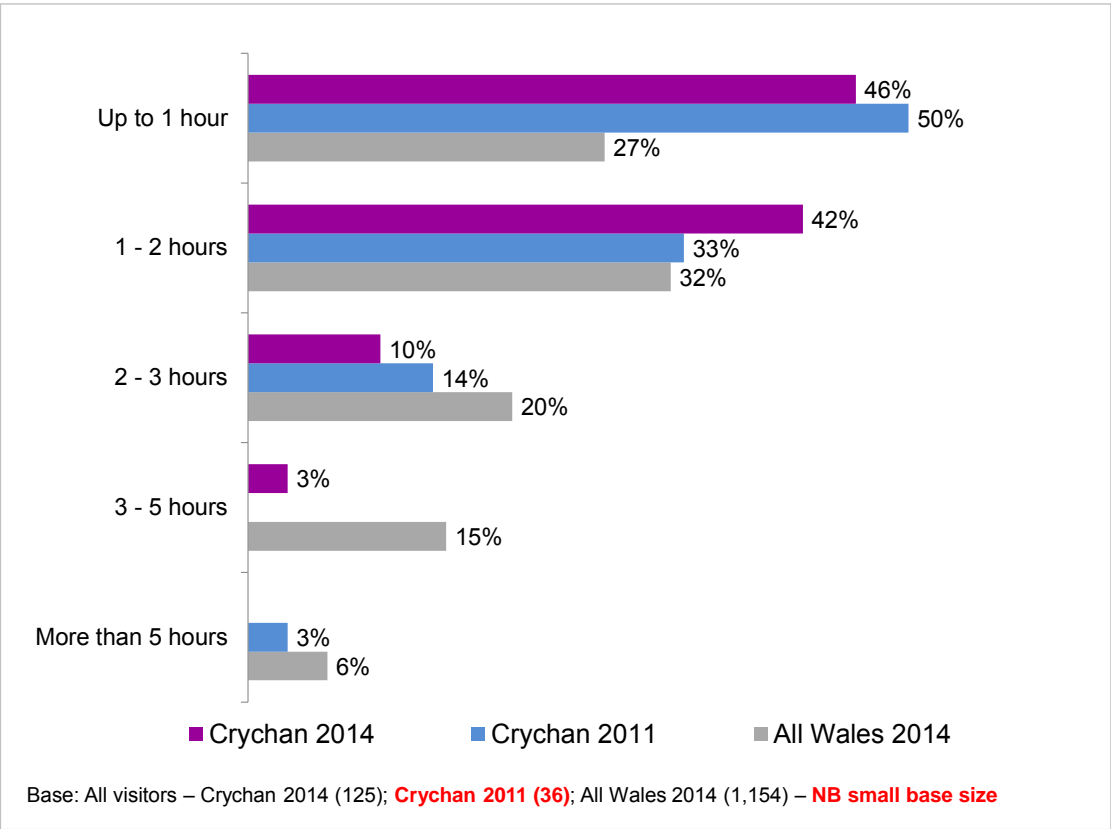


4.4 Length of visit

Visitors to Crychan were at the site for 1 hour and 19 minutes on average – a similar length of visit to 2011 (1 hour 13 minutes). This is somewhat shorter than the average length of stay across all sites in Wales which was 2 hours and 7 minutes.

Figure 6 below details the length of time spent at the site by time brackets and shows there has been little change since 2011 – on average, over eight in ten visitors spent less than 2 hours on their visit in both 2011 and 2014.

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 shows the combined figures for the following:

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

The most popular activity at Crychan was walking generally (85%) - this is somewhat higher than the all Wales average (69%) and the 2011 finding (64%). Unlike the average across the rest of Wales, dog walking was the most popular type of walking at Crychan, which 58% of visitors had taken part in that day (compared with 30% all Wales average). This is similar to the 2011 finding of 47%.

Around four in ten visitors to Crychan and across Wales on average had used sign-posted trails for their walking (without a dog), whilst around one in ten had been walking on non-signed routes.

Other popular activities at Crychan in 2014 included having a picnic or barbeque (21%) and admiring the views (10%).

Cycling represented a very small proportion of the activities undertaken at Crychan (7%), although has increased slightly since 2011 when just 3% took part in cycling. Across Wales, the average proportion of visitors who cycle at each site is 22%.

Just 2% said they had taken part in horse riding that day – down from 6% in 2011 (NB small sample size in 2011).

Due to the high number of walkers, overall the vast majority of visitors can be said to have taken part in 'active' activities (90%) which is somewhat higher than found in the 2011 research (64%) and virtually identical to the all Wales average 87%). See Table 4 overleaf.

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

	Crychan 2014 %	Crychan 2011 %	All Wales 2014 %
Cycling on forest roads, tracks or trails	5	3	15
Cycling off trails or tracks	2	-	11
TOTAL CYCLING	7	3	22
Walking on a sign-posted trail	39	31	42
Walking but not following sign-posts	9	17	12
Dog walking	58	47	30
TOTAL WALKING	85	64	69
Picnic or barbeque	21	25	17
Admiring the views	10	6	26
Running / jogging	3	6	3
Nature / natural history visit	3	-	7
A forest drive	2	-	2
Horse riding / pony trekking	2	6	<1
Using the café / restaurant / other catering	2	8	33
Bird watching	2	3	15
Orienteering / Geocaching	1	-	<1
Using the Visitor Centre or shop	1	-	14
Organised trip / event	1	-	2
Other	3	14	2
Taken part in ACTIVE activities	90	64	87

Base: All visitors – Crychan 2014 (125); Crychan 2011 (36); All Wales 2014 (1,154) – NB small base size

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 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 very small number of people undertaking cycling activities (9), this has not been commented on.

As previously mentioned, visits to Crychan lasted 1 hours and 19 minutes on average. Those walking spent an average of 58 minutes on walking, a 17 minute decrease since 2011 (NB very small sample size of walkers in 2011).

Table 5: Q5/Q6. Time spent taking part in walking at Crychan

	Total duration of visit		Time spent on any walking	
	2014 %	2011 %	2014 %	2011 %
Up to 30 minutes	6	31	20	13
31 – 60 minutes	39	19	45	17
1 – 2 hours	42	33	27	43
2 – 3 hours	10	14	3	9
3 – 5 hours	3	-	1	-
5+ hours	-	3	-	-
Don't know	-	-	4	17
AVERAGE	1 hr 19 mins	1 hr 13 mins	58 mins	1 hr 15 mins

Base: All respondents - 2014 (125); 2011 (36), Respondents who walked - 2014 (103); 2011 (23) - NB small base sizes

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

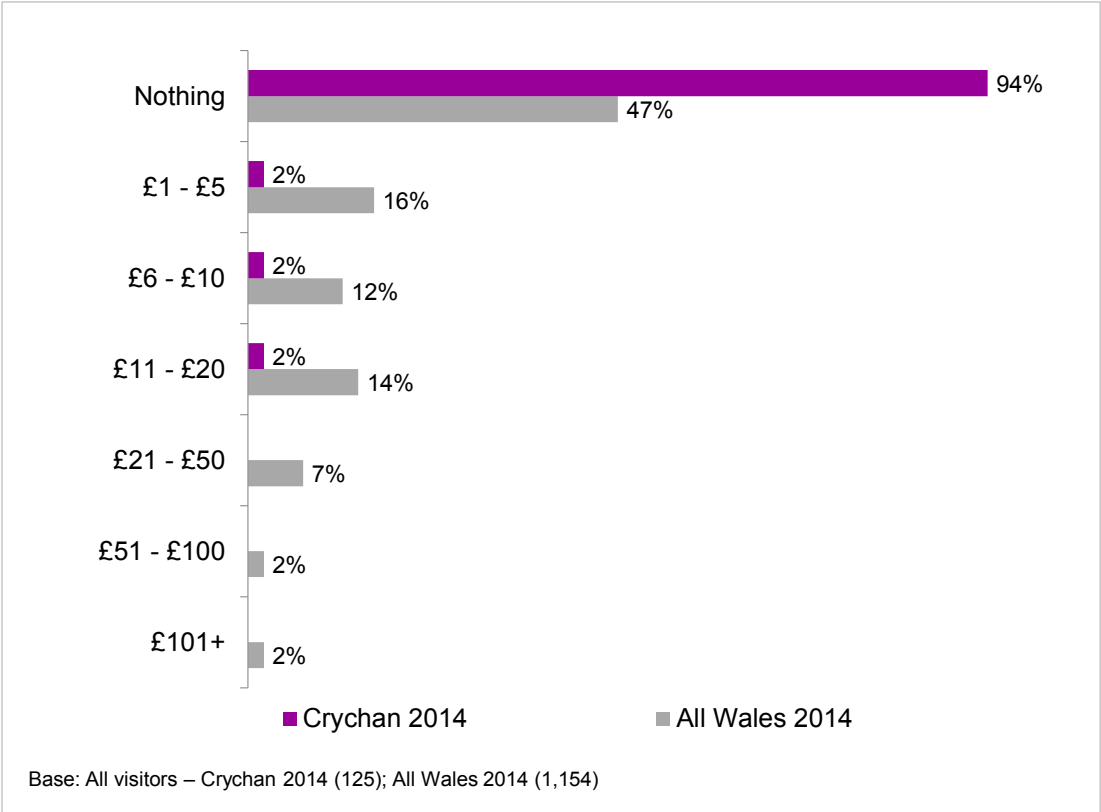
Visitors to Crychan were asked how much they planned to spend at the site on a variety of things, including food and drink, activities, parking, souvenirs and the hiring of equipment. Figure 7 shows the figures calculated by combining the data across all types of spending.

The vast majority of visitors, 94%, did not plan to spend anything during their visit whereas across Wales in general, non-spending accounted for around half of visitors (47%). The only items that visitors intended to spend on were food and drinks (6%), with an average spend of 64p: across Wales the average spend on site was £11.15.

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.

Of those who would spend at Crychan, no-one planned to spend more than £20 during their visit.

Figure 7: Q18a. Average spend per person/group at site by price range

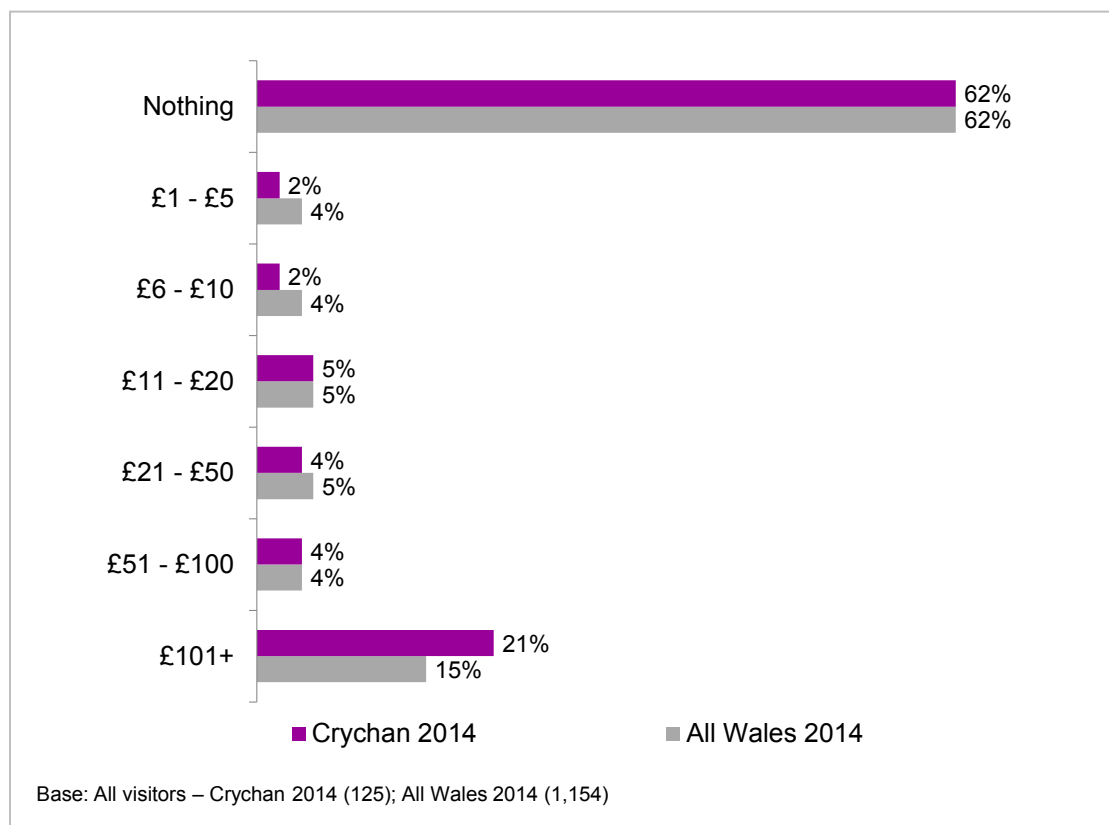


Visitors to Crychan were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. Figure 8 shows the figures calculated by combining the data across all types of spending.

A little under two thirds of visitors to Crychan said that they would not be spending anything in the area as a result of their trip (62%) which was identical to the all Wales average (62%).

Over a fifth of visitors said they would be spending over £101 in the local area (21%), which is higher than average across all Wales sites (15%). As a result, the average spend in the area was slightly higher at Crychan than the all Wales average: £96.69 at Crychan compared with £84.86 all Wales.

Figure 8: Q18b. Average spend per person/group in local area



Looking at specific spend in the local area as a result of their visit to Crychan, food and drinks were the highest planned spend area, with 32% intending to spend on this (average of £24.52), very similar to the all Wales average of 27% (average spend of £26.37).

One in five (18%) planned to spend money on accommodation, with an average intended spend of £46.29, again, similar to the all Wales average (15%; £50.24).

Due to a change in the way these questions were administered, 2011 comparisons were not possible – see Table 6 below.

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

	% spending anything on items		Average spend on items £	
	Crychan %	All Wales %	Crychan £	All Wales £
Food and drink	32	27	£24.52	£26.37
Accommodation	18	15	£46.29	£50.24
Parking	6	10	£4.79	£1.56
Souvenirs / gifts	5	7	£3.29	£2.68
Transport	4	20	£2.60	£9.83
Admissions to other attractions	1	5	£0.81	£4.97
Hiring equipment	-	1	-	£0.20
Anything else	6	3	£15.45	£2.37

Base: All visitors – Crychan 2014 (125); All Wales 2014 (1,154)

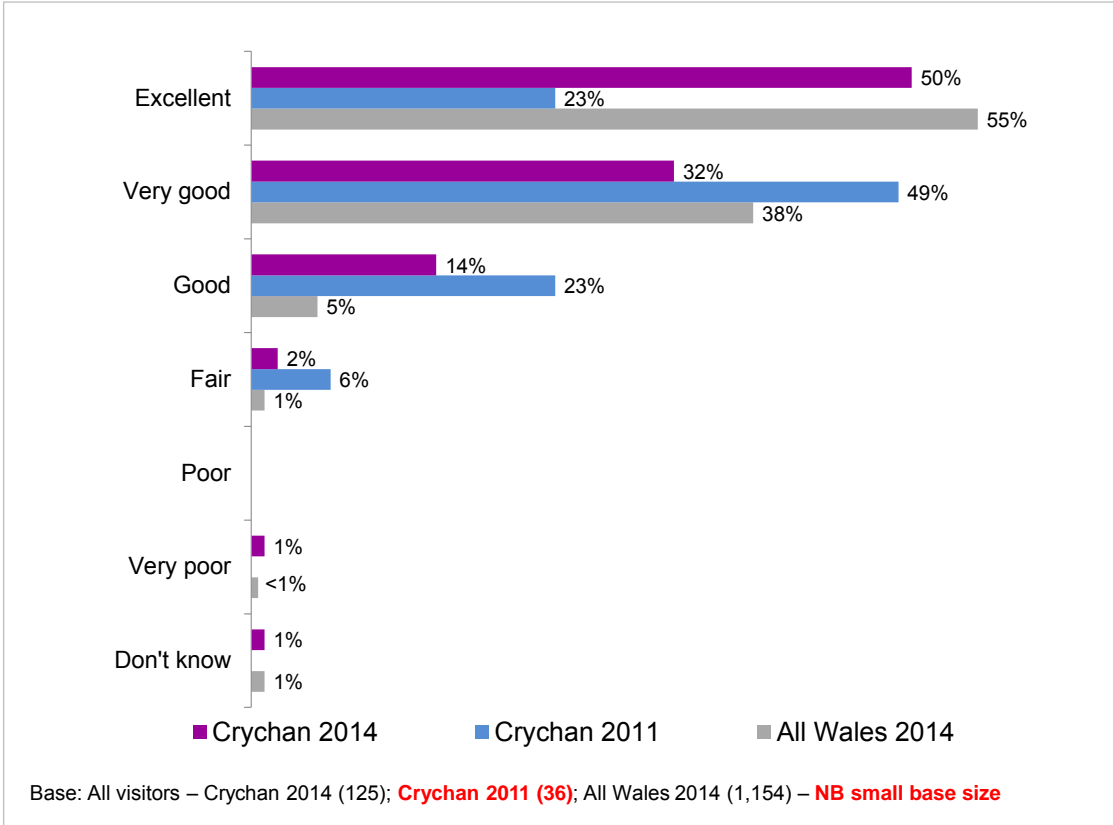
5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

Perceptions of Crychan as a place to visit were very positive and were much more positive than in 2011. Half of visitors rated the site as excellent (50%), which is in line with the all Wales findings (55%) and much higher than the previous study conducted at Crychan in 2011 (23%). A further third (32%) gave the site a rating of very good and 14% rated it as good – see Figure 9 below.

A few visitors gave a less than positive rating, with 2% saying it was fair (down from 6% in 2011) and 1% saying it was very poor:

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



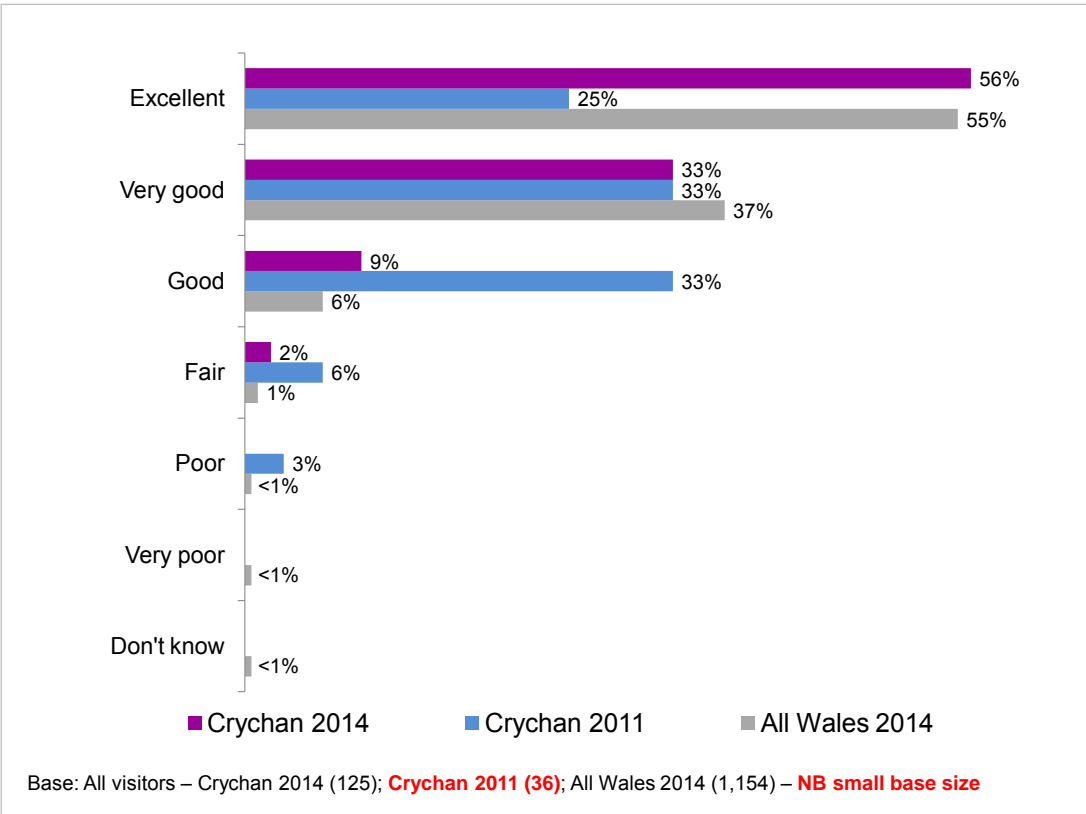
Day trippers were more likely than staying visitors to give an excellent rating (60% vs. 34%) and repeat visitors were slightly more positive than first time visitors (54% vs. 45%).

5.2 Overall rating of the site as safe and welcoming

Visitors were similarly positive about how safe and welcoming Crychan was, with again: a big improvement was seen since 2011 in the proportion who rated it as excellent – up to 56% in 2014 from 25% three years ago.

The findings at Crychan are now in line with the all Wales average on this measure.

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



Visitors were asked why they gave that rating, and the question was unprompted with visitors able to mention more than one aspect of the site. Table 7 overleaf details the comments provided by 2% or more of visitors giving a positive rating (excellent, very good, good) for Crychan and all Wales sites.

The scenery / views / beautiful environment were mentioned by most visitors (66%), whilst 42% said that Crychan was peaceful / pleasant / tranquil / relaxing. Around a third welcomed the fresh air / open space / freedom to move around (33%) or said the site was a safe environment generally (32%).

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

	Crychan 2014 %	All Wales 2014 %
The scenery / views / beautiful environment	66	41
Peaceful / pleasant / tranquil / relaxing / welcoming	41	32
Fresh air / open space / plenty of space / freedom	34	22
Safe environment generally for all people	31	28
Good provision of paths / trails and tracks	14	16
Clean / tidy / well maintained / litter free	12	17
Live locally / convenient / easy to get to / close	11	8
Good, safe place for the kids to play / run around	10	15
Well signposted / good maps / info boards	8	16
Well laid out / well organised / good set-up	8	14
Dog friendly	6	2
Good quality facilities / amenities	4	14
Other visitors are friendly	2	6
Good car parking	2	5
Plenty to do / has everything you want	1	1
Not too crowded / busy	1	1
General positive comments	1	2
Some negative comments	2	3

Base: Visitors rating the site as excellent, very good or good – Crychan 2014 (122); All Wales 2014 (1,137)

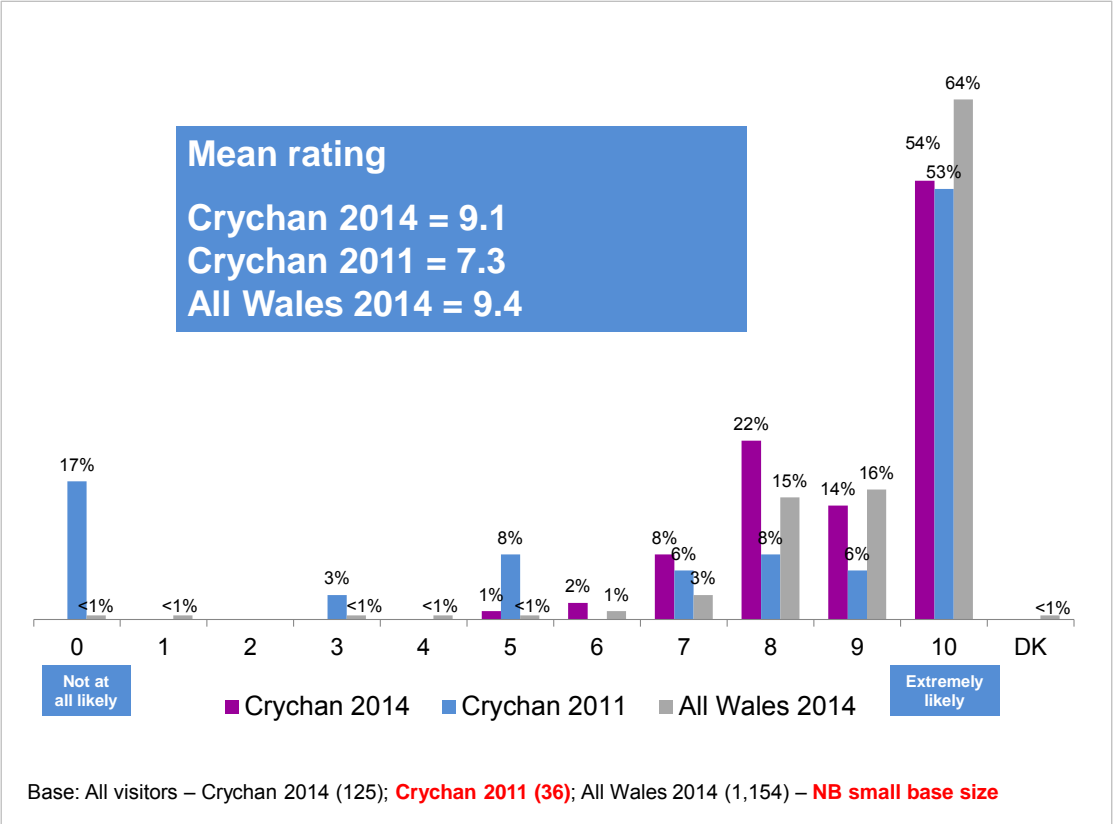
5.3 Recommending the site as a place to visit

Visitors were asked whether they would be likely to recommend Crychan 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 Crychan and all Wales sites generally were extremely positive with an average of 9.1 at Crychan compared with 9.4 across all Wales. This is a strong improvement since 2011 when the average likelihood of recommending Crychan was just 7.3.

Virtually the same proportion as previously gave a score of 10 out of 10 (54%); the difference in the overall rating comes from more visitors now giving a score of 8 or 9 and very few giving a score of 6 or below - from 28% in 2011 to just 3% in 2014. See Figure 11 below:

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



These results can be analysed further by using a Net Promoter Score (NPS), which divides visitors 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 Crychan is 64, which is somewhat lower than the all Wales score of 78, although does show a considerable improvement since 2011 when the NPS was just 31.

5.4 Favourite things about the site

Visitors to Crychan 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.

Two favourite things about Crychan stood out. The most mentioned (by almost nine in ten visitors) was the peace, tranquillity and relaxing atmosphere (87%) followed by the walks, paths and trails at 50%.

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

Activities	Crychan 2014 %	Crychan 2011 %	All Wales 2014 %
Peace / tranquillity / relaxation / atmosphere	87	78	49
Walks / paths / trails	50	25	34
Scenery / views / beautiful / natural	34	36	47
Fresh air / being outside	26	11	17
Like forests / trees / variety of trees and plants	21	8	10
Close to home / convenient location	18	17	12
Clean / well looked after	11	6	9
Safe environment	10	17	10
Wildlife / bird watching	10	17	18
Exercise / keeping fit	10	14	7
Been before / wanted to come again	9	6	6
The weather	8	-	2
Ideal for dogs / dog friendly / safe for dogs	8	-	4
Cycle trails / freedom / opportunity to cycle	7	6	16
Rivers / creeks / waterways	7	-	3
Good on-site facilities / BBQ areas / shop	6	6	16
Plenty / cheap / good parking	4	-	4
Activities that are good for the children	3	11	9
Opportunity to spend time with family / friends	3	8	4
Cost / value for money / free	2	-	2
Lots to see and do	2	6	3

Base: All visitors: Crychan 2014 (125); Crychan 2011 (36); All Wales 2014 (1,154) NB small base

A further third mentioned the scenery and views (34%) whilst a quarter just liked the fresh air and being outside (26%). The forests, trees and plants was the favourite aspect of Crychan for 21% of visitors.

The favourite elements of Crychan in 2014 were similarly popular in 2011, however, some aspects were mentioned for the first time in 2014 namely, the fact it is ideal for dogs / dog walking (8%), the rivers, creeks and waterways (7%) and the weather (8%). Also up from no mentions in 2011, 4% mentioned the good / cheap parking and 2% mentioned the good value of the site.

Other favourite things mentioned by small proportions of visitors (1%) included:

- Good accessibility
- Not too crowded / not too many people
- Events at the site
- Remote / away from traffic / no cars.

5.5 Suggested improvements to the site

Visitors were also asked if there was anything that would enhance their enjoyment of the site, and if anything had interfered with their enjoyment that day. Again, these questions were unprompted and visitors could mention more than one improvement or issue. Table 9 outlines the comments that were made by 2% or more.

Over two fifths of visitors to Crychan could not think of anything that would add to their enjoyment and only made positive comments (44%) which was very similar to the all Wales average of 46%. The main suggested improvement that was made, related to the toilet / shower / changing facilities, which a fifth of visitors felt could be improved on (20%). See Table 9 overleaf.

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

	Crychan 2014 %	All Wales 2014 %
Nothing / general positive comments	44	46
Improve toilets / more toilets / shower facilities / changing area	20	6
Improve signage / more maps / better maps	9	6
More dog poo bins / remove dog poo	9	7
More bins / litter bins / recycling bins / less litter	8	4
Improve maintenance of paths / cycle trails / surfacing	8	3
More picnic areas / BBQ / picnic tables and chairs	7	3
More seating	4	3
Better parking (easier, cheaper, more, free)	2	3
More trails / paths / cycle tracks	2	4
Provide café / catering / refreshments	2	2
More activities for children / more play areas	2	4
Improve café / catering	2	3

Base: All visitors – Crychan 2014 (125); All Wales 2014 (1,154)

Improved signage was mentioned by just under one in ten (9%), the same proportion who wanted more dog poo bins or the dog poo removed. Similarly, 8% requested more litter bins in general / less litter at the site and also improved maintenance of paths and trails. A small proportion of 7% wanted better picnic / BBQ areas and 4% wanted more seating.

Improvements mentioned by small numbers of visitors (1%) included:

- Longer, more challenging paths tracks and trails
- More wildlife / birds
- More information about wildlife, vegetation and the area
- Restricted access for dogs
- Better access for disabled people / make the site more accessible
- Fewer people / fewer cyclists.

When asked if there was anything that interfered with their enjoyment of the site, around two thirds reported that nothing had interfered with their enjoyment (68%). This is very similar to the all Wales average (70%).

The comments that were made were therefore mentioned by only a small proportion of visitors, and Table 10 details those made by 2% of the sample or more.

The poor weather was the most often mentioned thing to have spoilt their day (11%), followed by issues with the toilet facilities (4%), motorcycles or cars on/close to paths (4%), unclear / poor signs (3%) and dog mess on paths and play areas (3%).

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

	Crychan 2014 %	All Wales 2014 %
Nothing	68	70
Wet / raining / windy (poor weather)	11	8
Issues with toilets (not enough, closed, dirty etc.)	4	2
Motorcyclists on paths / cars too close to paths	4	1
Signs unclear / need better signs / more maps	3	3
Dog mess on paths / in play areas	3	4
Poor maintenance of site (paths, fences, waterways)	2	1
Dogs off leads / loose dogs / don't want dogs around	2	1

Base: All visitors – Crychan 2014 (125); All Wales 2014 (1,154)

Other things mentioned by small numbers of visitors (%) included:

- Problems with car parks (faulty machines, not enough spaces)
- Need more litter bins / recycling bins / too much litter
- No café
- Complaints about other visitors
- Too many midges.

6. Site facilities

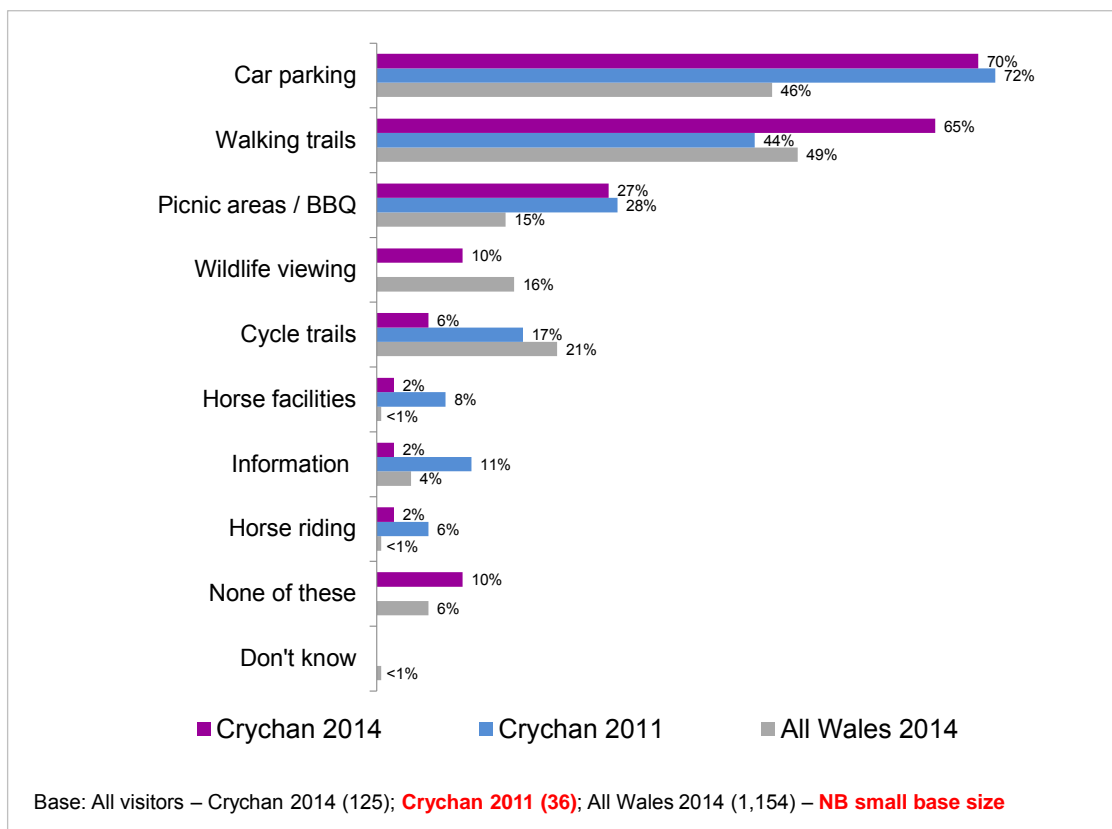
6.1 Importance of site facilities

Visitors were presented with a list of facilities available at Crychan and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable. Figure 12 below details the findings.

Car parking was the most important facility at Crychan which 70% of visitors mentioned. This was the same as in 2011 – both considerably higher than the all Wales average of 46%.

The second most important feature at Crychan was the walking trails, which almost two thirds rated as important (65%) – an increase since 2011 (44%) and higher than the all Wales average (49%).

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



Picnic or BBQ areas were important to just over a quarter of visitors (27%), unchanged since 2011, and again, higher than the all Wales average (15%). A new category, not mentioned before at Crychan, was 'wildlife viewing' which one in ten visitors said had influenced their decision to visit (10%).

Horse facilities were important to 2% of the sample, and a further 2% mentioned the horse riding in general – both have decreased since 2011 when 8% and 6% mentioned these facilities (NB low sample size in 2011).

One of the biggest changes since 2011 was seen in the proportion mentioning the cycle trails at Crychan – just 6% said these were important in 2014, compared with 17% in 2011 (and 21% all Wales average).

Certain other factors (apart from site facilities) were important to around half of visitors (46%) when choosing to come to the site. Those factors mentioned by more than 2% of visitors are outlined below in Table 11.

The main influencing non-site feature at Crychan was the fact it was dog friendly, which 18% of visitors mentioned. This is over three times the average for all Wales sites (5%).

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

	Crychan 2014 %	All Wales 2014 %
Nothing	54	60
Dog friendly / dogs can come off leads / dog facilities	18	5
Relaxing / peaceful / tranquil / quiet	8	3
Was just passing / en route	7	5
Wanted to go walking / cycling	6	3
Came for a nice day out	4	2
Close to home / local / convenient	3	7
Good weather / sunny / warm	2	4
Beautiful scenery / views / natural beauty	2	2
Good facilities	2	3
Came to use the river / pond / lake	2	1
Outdoors / fresh air / open spaces	2	2
Meeting / visiting with family and friends	2	3
Good for the children / children like it / child friendly	2	4
Close to where I am staying (staying visitors)	2	2
Easy to find / get to (transport links, signage etc.)	2	1
Good parking / cheap / free	2	1

Base: All visitors – Crychan 2014 (125); All Wales 2014 (1,154)

Other factors which influenced the decision to visit included ‘relaxing / peaceful / tranquil / quiet’ (8%), just passing by / en route (7%) and ‘wanted to go walking / cycling’ (6%).

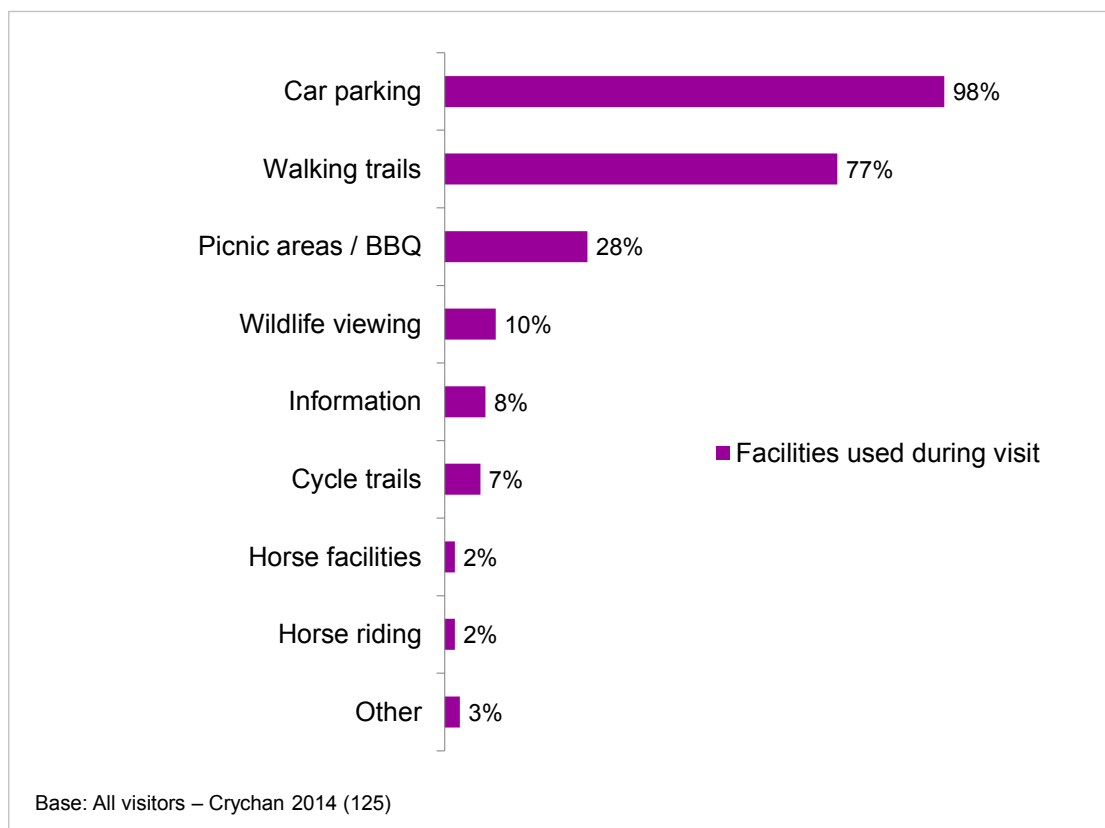
An additional question was asked at Crychan regarding dog walking: 69% of visitors questioned had a dog with them, and these visitors were asked if they would use specific paths and trail for dogs if they were available – such as those with agility exercise and off-lead areas. The overwhelming majority – 84% - said they would use these facilities if they were available. This equates to 58% of all visitors, for comparison purposes.

6.2 Facilities used

Visitors were then presented with the same list as Section 6.1, 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 was used by almost all visitors (98%) and over three quarters had used the walking trails (77%).

Picnic/ BBQ facilities were used by 28% of visitors: wildlife viewing was experienced by one in ten visitors (10%) whilst 8% had used information at the site.

Figure 13: Q15a. Facilities used at Crychan 2014



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 Crychan have been detailed in Figure 14 below, and only relate to car parking, walking trails and picnic / BBQ areas, due to the small sample sizes of users for the other facilities. Ratings were generally extremely positive, with most visitors giving a positive rating of either 'excellent', 'very good' or 'good' to each facility.

Car parking was most positively rated, with almost half saying it was excellent (48%), a further quarter (27%) saying it was very good and the remaining quarter saying it was good (25%). No-one one rated the parking negatively.

Walking trails were also very positively rated, with 44% saying they were excellent, 31% very good and 22% good. Only 3% said they were 'fair' but no one said the walking trails were poor.

The picnic / BBQ areas were mostly scored positively, although the scores were more lukewarm than for the other facilities rated; more visitors said the picnic facilities were 'good' and less said they were 'excellent' (26% said they were excellent, 23% very good and 43% good). In addition, 6% said the picnic facilities were fair and 3% said they were poor. See Figure 14 below:

Figure 14: Q15b. Rating of Crychan site facilities 2014 – main facilities used

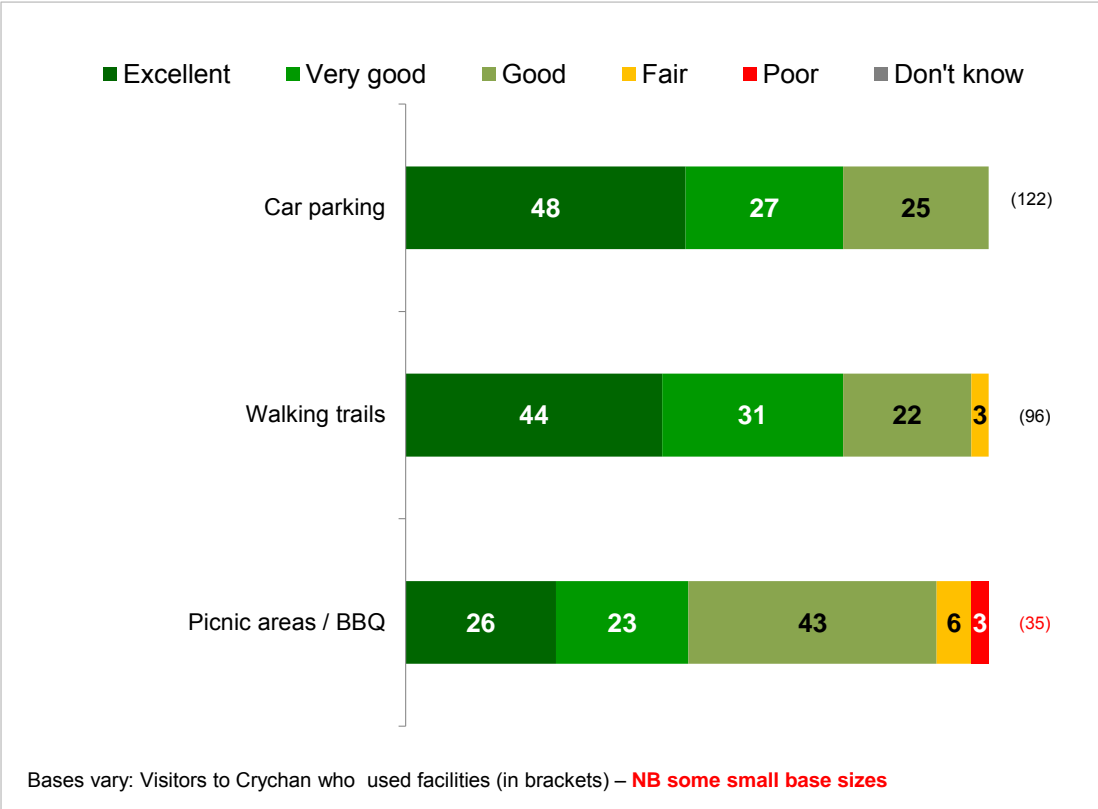


Table 12 below compares the proportion giving ‘excellent’ ratings to the facilities used in 2014 compared with 2011. Very encouragingly, all three features at Crychan were rated more positively now than in 2011 – car parking has seen a 39 per cent point increase since 2011 and walking trails, a 28 per cent point increase. The picnic areas are also more positively rated now, although the increase is marginal, at 6 per cent points:

Table 12: Q15b – Proportion rating facilities at Crychan as ‘Excellent’ 2014 vs. 2011

Facilities	Crychan 2014 %	Crychan 2011 %	% point change
Car parking	48	9	+39
Walking trails	44	16	+28
Picnic areas / BBQ	26	20	+6

Bases vary: visitors using each facility – NB some very small bases

7. Sources of information used to plan visit

Visitors were asked where they found out about Crychan 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 in Table 13 below.

Mostly visitors had just been passing by or were en route to somewhere else (40%) or had always known about the site/ visited before (35%).

One in ten said they had seen road signs to Crychan (11%) and a similar proportion had heard about it through word of mouth (9%).

A few visitors said they had found out about Crychan online: 4% via Google or other search engines whereas 2% had been on the NRW website and heard of it that way. The same proportion had heard of it via another website (2%).

Leaflets had been successful at alerting 2% of visitors to the site's existence. See Table 13 below for more details:

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

	Crychan 2014 %	Crychan 2011 %	All Wales 2014 %
Just passing / en route	40	17	13
Always known about it / been here before	35	50	51
Road signs	11	19	5
Word of mouth	9	8	20
Google / other search engine	4	-	5
Other websites	2	-	2
Leaflet	2	-	4
Map	2	3	2
NRW website	2	-	1

Base: All visitors – Crychan 2014 (125); Crychan 2011 (36); All Wales 2014 (1,154) – NB small base size

8. Visiting other areas and attractions

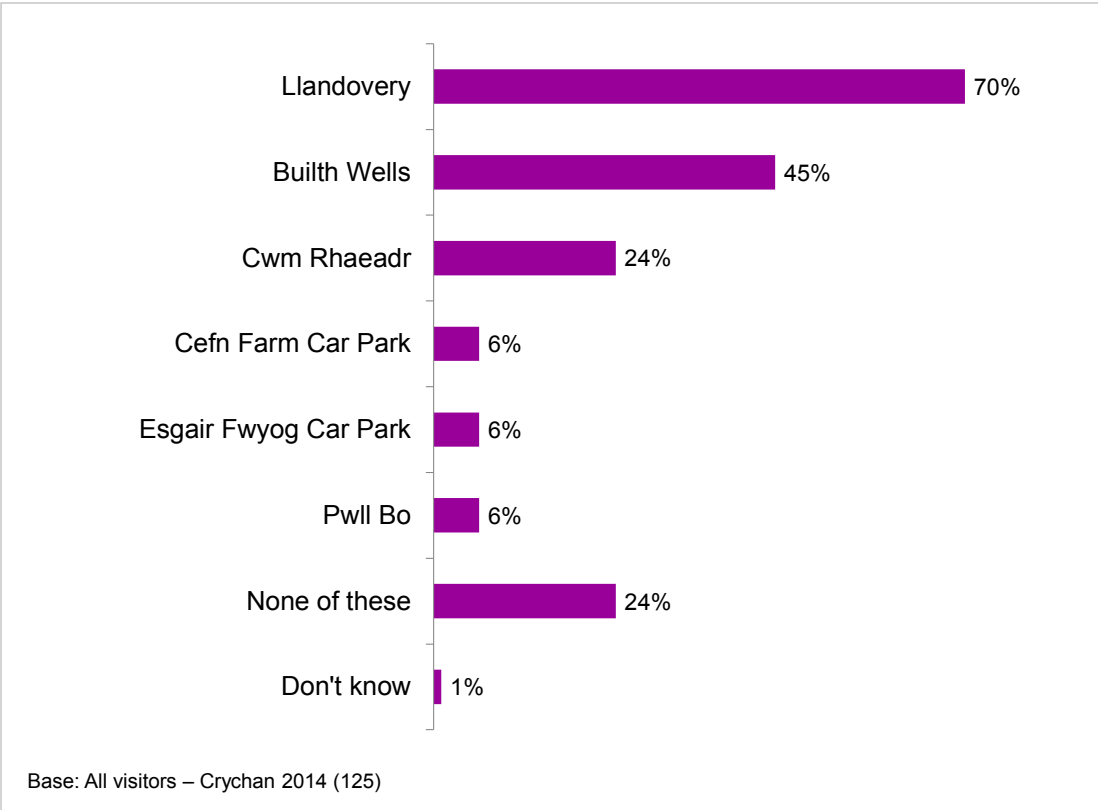
Visitors to Crychan were presented with a list of nearby attractions and towns, and asked whether they had visited any of these in the last 12 months.

Over three quarters of visitors (76%) had visited at least one other attraction in the area, the most popular being Llandovery at 70%.

Builth Wells was also popular amongst Crychan visitors, with 45% having been there in the last year. Just under a quarter of visitors had been to Cwm Rhaeadr (24%).

Around one in twenty (6%) visitors had each been to Cefn Farm Car Park, Esgair Fwyog Car Park or Pwll Bo.

Figure 15: Q19. Other areas / attractions visited 2014



Appendix I

Questionnaire

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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