

Research Report

Quality of the Visitor
Experience 2015

Gwaun Hepste



Prepared for:
Natural Resources Wales /
Forestry Commission England

Prepared by:
Beaufort Research



**Cyfoeth
Naturiol**
Cymru
**Natural
Resources**
Wales



Forestry Commission
England

Contact Details

Agency contact: Sarah McDonough

Project: B01326-3

Date: February 2016

Beaufort Research

2 Museum Place

Cardiff

CF10 3BG

Tel: (029) 2037 8565

Fax: (029) 2037 0600

E-mail: enquiries@beaufortresearch.co.uk

www.beaufortresearch.co.uk

Terms of Contract

Unless otherwise agreed, the findings of this study remain the copyright of Beaufort Research Ltd and may not be quoted, published or reproduced without the company's advance approval.

Approval to quote or publish will only be withheld on the grounds of inaccuracy or misrepresentation.

Any approved publication must detail: Beaufort Research Ltd as provider, sample size and field dates.

© Beaufort Research Ltd 2016



Contents	Page
1. Executive summary	1
1.1 Quality of the Visitor Experience Research.....	1
1.2 Gwaun Hepste	1
1.3 Perceptions of the site	2
1.4 Strengths of the site	3
1.5 Areas for improvement.....	4
1.6 Visitor profile	4
2. Introduction	6
2.1 Background.....	6
2.2 Research programme	7
2.3 Report	8
2.4 Data tables.....	8
3. Visitor profile information	9
3.1 Visitor profile	9
3.2 Group profile	11
3.2.1 Size of group.....	11
3.2.2 Composition of group.....	12
4. Profile of visit	14
4.1 Type of visit.....	14
4.2 Visitor origin	15
4.3 Frequency of visits	17
4.3.1 First-time visitors.....	17
4.3.2 Repeat visitors	17
4.4 Length of visit.....	18
4.5 Activities undertaken.....	19
4.6 Length of time spent on activities.....	21
4.7 Money spent at site and in area as a result of the visit	23

5.	Perceptions of the site	26
5.1	Overall rating of the site as a place to visit.....	26
5.2	Overall rating of the site as safe and welcoming.....	27
5.3	Recommending the site as a place to visit.....	29
5.4	Strengths of the site	31
5.5	Areas for improvement.....	32
6.	Site facilities	35
6.1	Importance of site facilities.....	35
6.2	Facilities used	37
6.3	Rating of site facilities	38
7.	Sources of information used to plan visit	40
8.	Visiting other areas and attractions	41

Appendices

Appendix I - Questionnaire

Appendix II - Explanation of social class

1. Executive summary

1.1 Quality of Visitor Experience Research

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

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

This report summarises the findings from the 127 visitor interviews conducted at Gwaun Hepste 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 Gwaun Hepste

Gwaun Hepste close to Ystradfellte, Powys this large car park is one of the main access points to the waterfalls which are part of the Brecon Beacons National Park Forests. A pay and display meter has been installed, which helps pay for a roving car park attendant. From this car park you can try the famous Four Falls Trail, taking in the waterfalls of Sgwd yr Eira and Clun-Gwyn.

1.3 Perceptions of the site

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

Just under half (46%) rated the site as 'excellent'; considerably higher than the data from 2012 survey (29%) but lower than the all Wales figures (58%). A further two fifths (43%) gave the site a rating of 'very good' and 6% rated it as 'good'.

Opinions on Gwaun Hepste were less enthusiastic in 2012 compared to 2015; as mentioned above, fewer people rated the site as 'excellent' (29%), and many more people felt it was simply 'good' (26%). Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 89%, up significantly from the 2012 figure of 72%.

Similarly, ratings of how safe and welcoming Gwaun Hepste were also positive, although less so than was seen across all Wales sites. Only 1% of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

Just under a third of visitors gave this measure an 'excellent' rating (31%); this was significantly lower than the figure obtained for all Wales sites (52%), but higher than the findings from the 2012 survey (23%).

Another two fifths (42%) gave a 'very good' rating for how safe and welcoming Gwaun Hepste felt (in line with both the all Wales and 2012 figures). Just under two in ten (17%) gave a 'good' rating. Back in 2012, a sizable minority of 22% gave the site a 'fair' or 'poor' rating in terms of how safe and welcoming it felt; this reduced to 7% in 2015. Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 73%, up slightly from the 2012 figure of 69%.

When asked whether they would be likely to recommend Craig y Dinas as a place to visit to a friend or relative (using a score of 0-10), Gwaun Hepste and all Wales sites generally were extremely positive: only 7% gave a rating of less than 8/10 for Gwaun Hepste, which was considerably lower than the 2012 position, when 31% 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 Gwaun Hepste in 2015 (49%) compared to the previous survey (18%) or the all Wales average (31%). And while there were fewer negative ratings at this site than was seen previously, the proportion giving the highest rating of 10/10 dropped from 49% to 42% (both figures being lower than the 2015 all Wales average of 62%). Reflecting the change in the distribution of scores, the mean rating for Gwaun Hepste stood at 8.8, higher than the 2012 average rating of 7.6, but lower than the all rating of Wales at 9.4.

Looking at the perceived quality of various facilities at the site; The features that received the highest score, by far, were the waterfalls; over three quarters of 'users' rated these as 'excellent', with another 19% rating them as 'very good'. The remaining 4% rated them as 'good', with no negative ratings being received for these features of the site. The walking trails were considered 'excellent' by nearly half of users (45%); for the information and car parking, perceptions were less positive, with only a fifth considering these to be 'excellent'.

One particular facility of the site stood out as having very high levels of dissatisfaction; this was the parking charge. Over a third of users rated this as 'poor', which was much higher than was seen for any other aspect at this site. Moreover, no other facility at any of the sites in Wales had such high levels of dissatisfaction.

1.4 Strengths of the site

Two favourite things about Gwaun Hepste stood out; the most mentioned (by nearly half) were the rivers, creeks, waterways and waterfalls (48%) and the scenery and beautiful views (46%). A third (33%) mentioned the peace and tranquillity of the site, followed by a fifth mentioning the walks, paths and trails (21%).

The distribution of comments for Gwaun Hepste varied when compared to both the all Wales averages and the previous research. For example, many more people were inclined to speak of the water features in the recent survey, compared to both the previous survey and the all Wales average (27% and 10% respectively), while fewer people spoke of the scenery and beautiful views (73% in 2012; 62% across Wales). Moreover, almost double the proportion of visitors to Gwaun Hepste in 2012 mentioned the peace and tranquillity of the site (73%) compared to the recent survey (46%).

1.5 Areas for improvement

At Gwaun Hepste, the slight majority of visitors felt that something could be improved at the site (56% cf. 47% overall). Most of the comments received related to a need to improve the toilets and changing facilities at the site (20%), while a tenth called for better parking and signage around the site (10% and 9% respectively) and a need for catering to be provided (8%).

When asked if there was anything that interfered with their enjoyment of their visit to Gwaun Hepste, over half (55%) reported that nothing had. However, this was lower than the proportion saying the same at all Wales sites (68%), again illustrating that visitors to Gwaun Hepste found more issues with this site compared to all Wales sites in general. Again, most comments related to issues with the toilets and changing facilities (15%), with another 10% saying that the unclear signage around that site had affected the enjoyment of their trip.

There were calls by small minorities for:

- Need more seating
- No café
- Complaints about other visitors
- Tree felling / chopping down too many trees.

1.6 Visitor profile

In 2015, nearly two thirds (62%) of visitors to Gwaun Hepste were first time visitors; this proportion is nearly double the all Wales average (37%) but in line with the 2012 figure of 63% who said they had **never** visited their respective NRW site before. Only around a third of visitors to Gwaun Hepste had been to the site previously (36%).

Although there was a slight skew towards day trip visitors to Gwaun Hepste in 2015 (53%), this was less pronounced than was seen in 2012 (66%). Most of these visitors had travelled less than three hours to visit the site (51% in 2015; 66% in 2012). There were slightly fewer day trip visitors at Gwaun Hepste compared to the all Wales average (53% cf. 62%).

Conversely, there were more visitors at Gwaun Hepste who were staying overnight or as part of a longer holiday (45%) compared to the all Wales average (37%); most of these staying visitors at the site were holidaying in the area (38%). Back in 2012, a third of visitors to (35%) were staying in the area, with 22% of these staying as part of a longer holiday / trip

There was a slight skew towards more male than female visitors to the site (55% male vs. 45% female); this was slightly more balanced than the all Wales profile (58% male and 42% female), but less balanced than was seen in 2012 (51% male vs. 49% female).

In terms of age; the profile of visitors to Gwaun Hepste was very similar to previous research at this site, but younger than the all Wales average. Just over half (57%) were aged 16-44 years (vs. 58% in 2012 and 43% all Wales). A further 33% were aged between 45 and 64 years (34% 2012; 41% all Wales). Smaller proportions of visitors to Gwaun Hepste in both 2015 and 2012 were 65+ (9% 2015; 4% 2012) compared to the all Wales average (15%).

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%). There was an equivalent skew towards ABC1 visitors at Gwaun Hepste, with 74% of visitors categorised as ABC1, and 25% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

2. Introduction

2.1 Background

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

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

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

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

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

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

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

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

2.2 Research programme

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

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

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

Table 1: Interviewing sites and number of interviews conducted

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

* H = High usage; M = Medium usage

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

The core interviewing period ran from March to October 2015. At Gwaun Hepste, interviewing took place between 31st March and 28th October, and a total of 127 interviews were conducted.

2.3 Report

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

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

2.4 Data tables

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

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

3. Visitor profile information

3.1 Visitor profile

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

There was a slight skew towards more male than female visitors to the site (55% male vs. 45% female); this was slightly more balanced than the all Wales profile (58% male and 42% female), but less balanced than was seen in 2012 (51% male vs. 49% female).

In terms of age; the profile of visitors to Gwaun Hepste was very similar to previous research at this site, but younger than the all Wales average. Just over half (57%) were aged 16-44 years (vs. 58% in 2012 and 43% all Wales). A further 33% were aged between 45 and 64 years (34% 2012; 41% all Wales). Smaller proportions of visitors to Gwaun Hepste in both 2015 and 2012 were 65+ (9% 2015; 4% 2012) compared to the all Wales average (15%).

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%). There was an equivalent skew towards ABC1 visitors at Gwaun Hepste, with 74% of visitors categorised as ABC1, and 25% categorised as C2DE. Socio-economic profiles of visitors to the site in 2012 were unavailable for comparison.

No doubt reflecting the socio-economic profile, the majority of visitors to Gwaun Hepste were in full-time employment (59%); this figure was equal to the all Wales average (59%), but slightly higher than was found in the previous research in 2012 (54%). Reflecting the younger age profile, only 9% of visitors to this site were retired; lower than the all Wales average (18%) but double the proportion in the 2012 survey (4%).

Around a third of visitors to Gwaun Hepste (31%) had children living at home; in line with all Wales average of 29% (no data for 2012).

The majority of visitors to Gwaun Hepste were White British / Welsh / Irish (80%), although a sizable proportion described their ethnicity as 'White other' (13%). Another 5% described themselves as 'Black / Asian / Mixed', illustrating a more ethnically diverse visitor base at Gwaun Hepste compared to all sites across Wales.

Only 8% of visitors to Gwaun Hepste spoke Welsh, lower 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		Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales %	
Gender	Male	55	51	58	
	Female	45	49	42	
Age	16 - 24	12	6	6	
	25 - 34	17	26	16	
	35 – 44	28	26	21	
	45 – 54	24	24	22	
	55 – 64	9	10	19	
	65+	9	4	15	
	Refused	1	4	1	
	Social class	AB	32		32
C1		42		43	
C2		18		16	
DE		7		9	
Refused		1		1	
Working status	Full-time employee (30+ hours per week)	59	54	59	
	Part-time employee (<30 hours per week)	11	10	9	
	Self-employed	6	13	6	
	On a Government supported training scheme	1	-	<1	
	Full-time education	4	2	3	
	Unemployed	2	1	1	
	Permanently sick / disabled	1	-	1	
	Retired	9	4	18	
	Looking after the home	5	4	2	
	Other	2	4	<1	
	Refused	2	-	1	
	Limiting illness	Yes – limited a lot / little	4	5	6
		No	95	95	92
Refused		1	-	2	

Demographic groups		Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales %
Children in household	Yes	31		29
	No	68		70
	Refused	1		1
Ethnicity	White – British / Welsh / Irish	80		91
	White – Other	13		7
	Black / Asian / Mixed	5		2
Welsh speaker	Yes	8		13
	No	92		87

Base: All visitors – Gwaun Hepste 2015 (127); Gwaun Hepste 2012 (93) All Wales (1,188).

3.2 Group profile

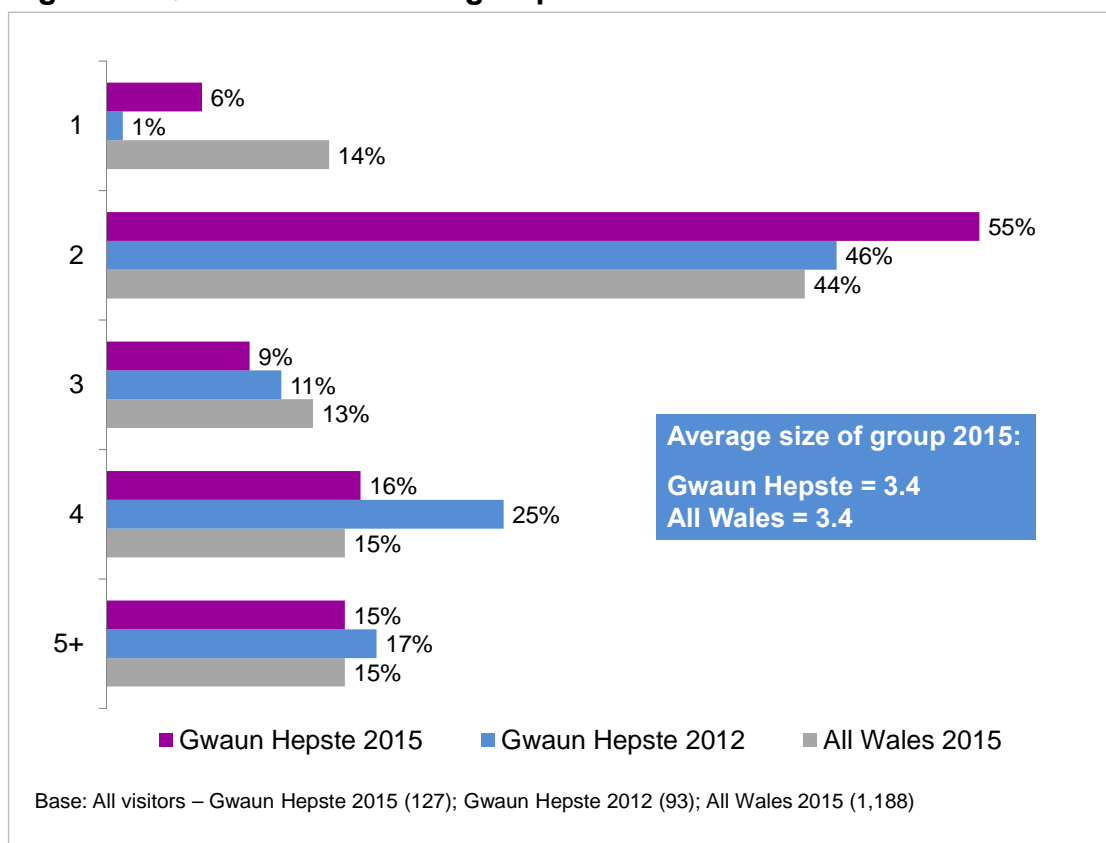
3.2.1 Size of group

Group sizes at Gwaun Hepste were equal to the group sizes to all Wales sites (3.4 people). There were fewer lone visitors to this site (6%) compared to all Wales (14%), but more two-person groups (55% cf. 44% all Wales).

The proportions of visitors in group sizes of 3 or more were comparable to the all Wales data.

Compared to 2012, there were noticeably more lone visitors in 2015 (6% cf. 1%), and more two-person groups (55% cf. 46%). Back in 2012, there were more larger visitor groups at Gwaun Hepste, most noticeably those visiting in a group of four people (25% in 2012 cf. 16% in 2015) – see Figure 1 overleaf.

Figure 1: Q1. Total size of the group



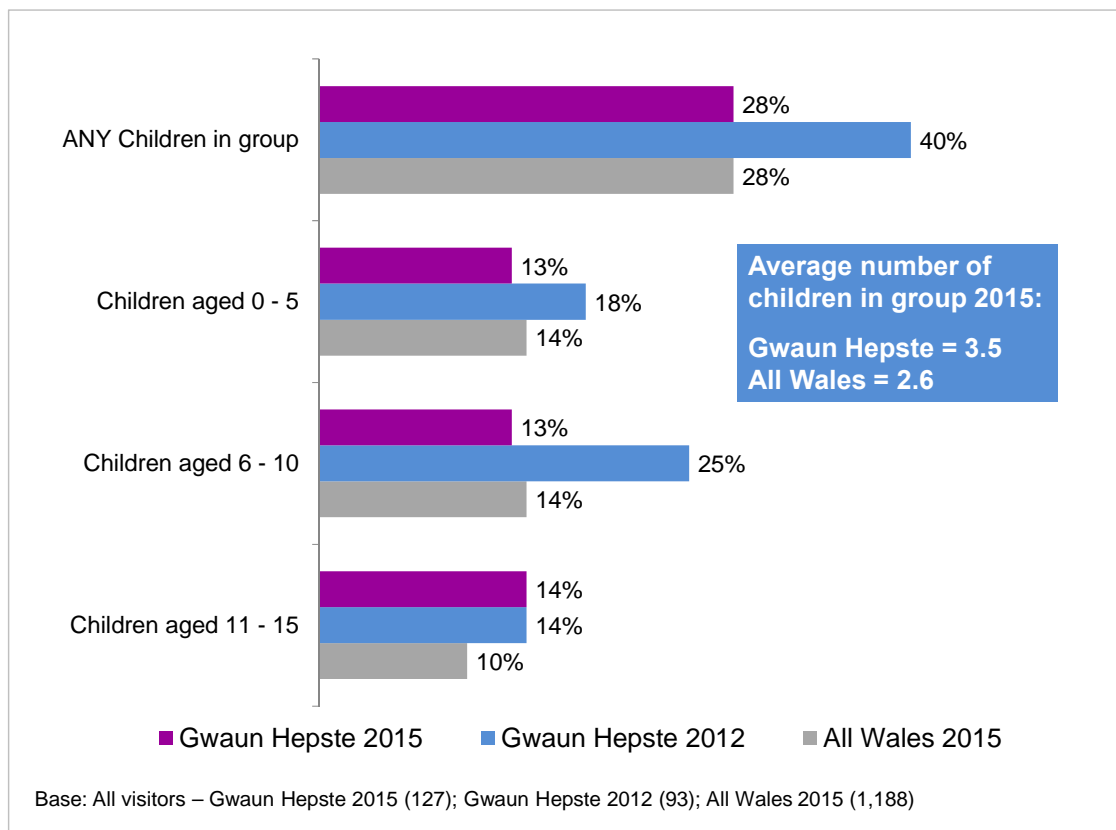
3.2.2 Composition of group

Visitor groups at Gwaun Hepste contained children fewer children in 2015 compared to 2012; in the most recent survey, just under three in ten visitors were accompanied by children (28%), while in 2012 this proportion stood at 40%. And while the proportion of groups with children at Gwaun Hepste in 2015 was comparable to the all Wales data (28% for both), the average number of children per group was higher at this site (3.5 cf. 2.6 all Wales).

On the whole, the age profile of the children visiting this site in 2015 was comparable to the all Wales data, with the exception of older children aged 11-15 years. While 14% of visitor groups at Gwaun Hepste contained children of this age, this was the case for only 10% of all Wales visitor groups.

The most noticeable difference between the 2015 and 2012 data concerned children aged 6-10 years. Back in 2012, a quarter (25%) of visitor groups to Gwaun Hepste contained children of this age; this had dropped to 13% in 2015 – see Figure 2 overleaf.

Figure 2: Q1. Composition of group



4. Profile of visit

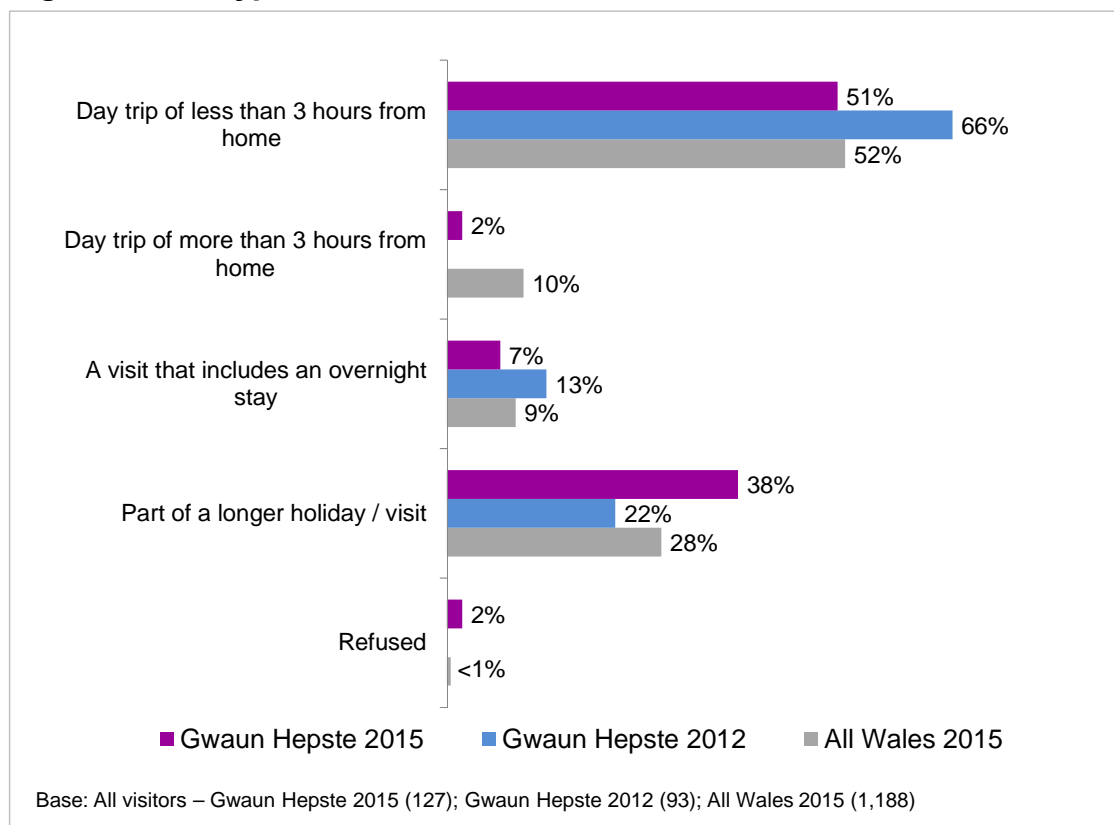
4.1 Type of visit

Although there was a slight skew towards day trip visitors to Gwaun Hepste in 2015 (53%), this was less pronounced than was seen in 2012 (66%). Most of these visitors had travelled less than three hours to visit the site (51% in 2015; 66% in 2012). There were slightly fewer day trip visitors at Gwaun Hepste compared to the all Wales average (53% cf. 62%).

Conversely, there were more visitors at Gwaun Hepste who were staying overnight or as part of a longer holiday (45%) compared to the all Wales average (37%); most of these staying visitors at the site were holidaying in the area (38%).

Back in 2012, a third of visitors to (35%) were staying in the area, with 22% of these staying as part of a longer holiday / trip - 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, the slight majority of visitors to Gwaun Hepste lived outside of Wales (54%), with 46% visiting from England, 1% from the rest of the UK and 8% from abroad. The proportion of overseas visitors to Gwaun Hepste was double that seen across all Wales sites (4%).

Amongst the 46% of visitors coming from Wales, most of these lived fairly close by, either in South East Wales (19%) or the Valleys (16%). Only 12% lived in either Mid or North 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		Gwaun Hepste 2015 %	All Wales %
Home region	North Wales	-	4
	Mid / West Wales	6	14
	South West Wales	6	7
	Valleys	16	6
	South East Wales	19	30
	Outside of Wales	54	39
Home nation	Wales	46	61
	England	45	35
	Rest of UK	1	<1
	Abroad	8	4

Base: All visitors – Gwaun Hepste 2015 (127); All Wales (1,188)

Figure 4a: Map of visitor origin for Gwaun Hepste 2015



Figure 4b: Map of visitor origin for Gwaun Hepste 2012



4.3 Frequency of visits

4.3.1 First-time visitors

In 2015, nearly two thirds (62%) of visitors to Gwaun Hepste were first time visitors; this proportion is nearly double the all Wales average (37%) but in line with the 2012 figure of 63% who said they had **never** visited their respective NRW site before.

Only around a third of visitors to Gwaun Hepste had been to the site previously (36%).

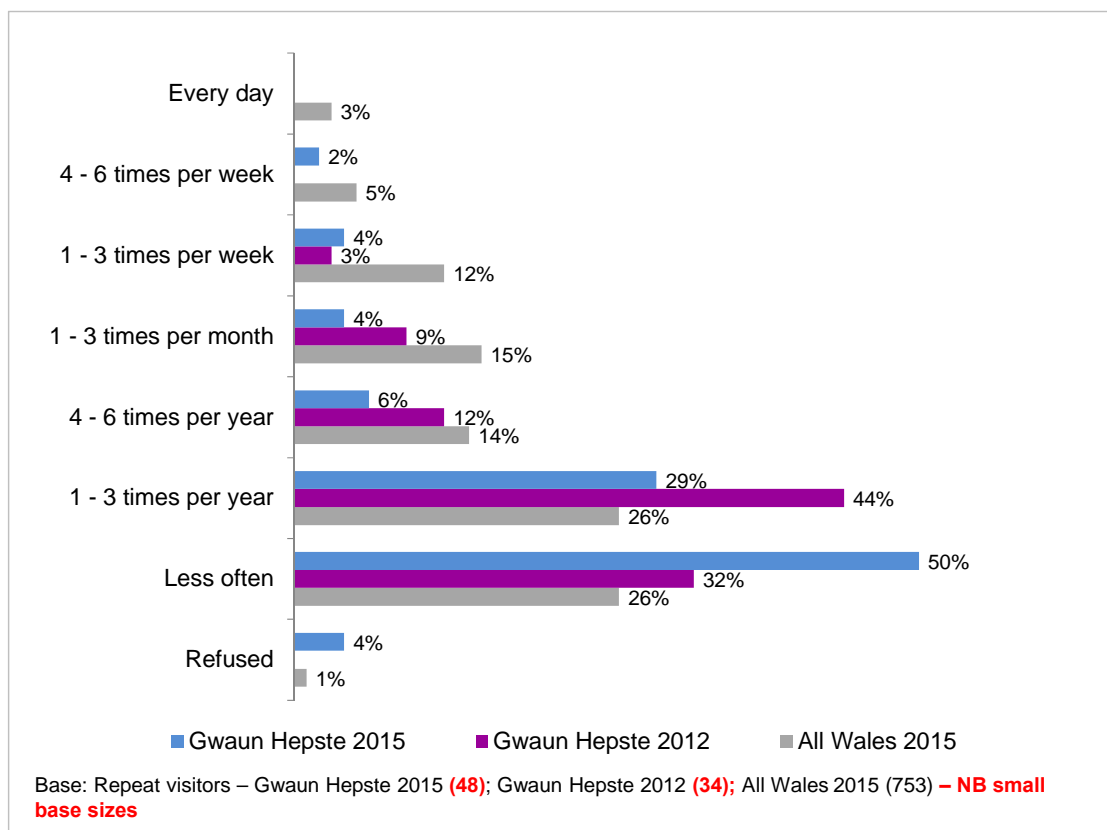
4.3.2 Repeat visitors

Focussing on repeat visitors (and no doubt reflecting the fact that many visitor to Gwaun Hepste lived outside of Wales); the vast majority were fairly infrequent visitors, coming to the site only a one to three times a year or less often than this (89%). Only a very small proportion visited this site on a weekly basis (6%), with another 4% coming one to three times a month.

This varies from the all Wales picture, but is in line with the 2012 research. Across all Wales sites in 2015, there was a much lower proportion of infrequent visitors (52% visiting three times a year or less often), and a higher proportion of more regular visitors, with 20% visiting weekly, and 29% visiting every month or so.

In 2012, once again most visitors to the site were fairly infrequent visitors, although a higher proportion came one to three times a year (44%) than was seen in the recent research, and fewer came less often than this (32%). In the previous research, weekly visitors accounted for just 3% of all regular visitors to Gwaun Hepste – see Figure 5 overleaf.

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



4.4 Length of visit

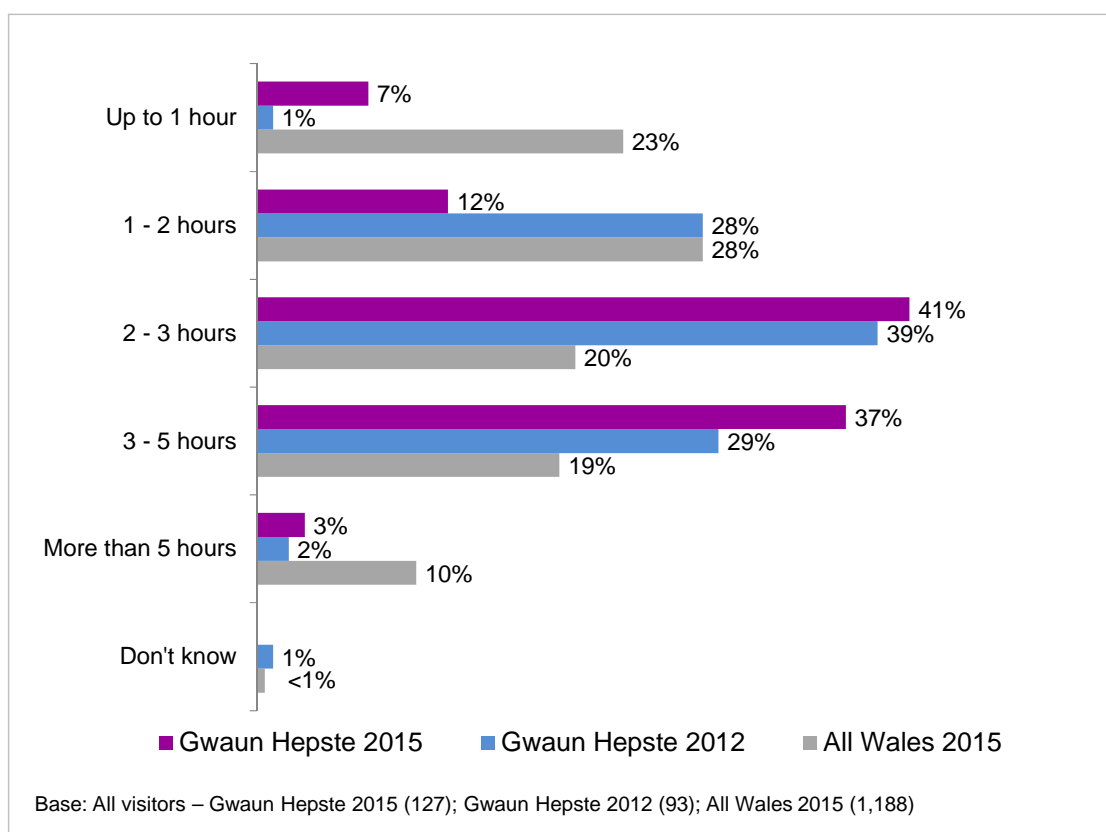
Visitors to Gwaun Hepste were at the site an average of 2 hours and 54 minutes; longer than average length of stay across all sites in Wales (2 hours 24 minutes), and slightly longer than the average stay in 2012 (2 hours and 42 minutes).

The varying lengths of time visitors spent at Gwaun Hepste can be seen below. As reflected in the average time at the site, over three quarters of visitors reported that they had stayed between two and five hours at the site (78%).

For just 7% of visitors, their trip to the forest was fairly brief, lasting less than one hour; this was significantly lower than the all Wales average of 23%, but higher than the 2012 figure of 1%.

Back in 2012, fairly even proportions of visitors to Gwaun Hepste claimed to be visiting for one to two hours (28%), two to three hours (39%) and more than three hours (31%) – 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.

The most popular activity at Gwaun Hepste, by far, was walking generally (98%) - this was marginally higher than the all Wales average of 94%, and the 2012 figure of 92%.

Most walkers tended to use the sign-posted trails (94%), rather than walking off the trails (15%) or dog walking (20%). The propensity to use the sign-posted trails was greater at Gwaun Hepste than across all Wales sites in 2015 (68%) and in the previous survey (86%).

None of the visitors interviewed at Gwaun Hepste in 2012 had taken part in cycling activities; 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 (2% and 1% respectively); nobody took part in horse-riding at this site.

Therefore, virtually all visitors (98%) took part in 'active' activities (cf. 95% in 2012 and 93% across Wales in 2015).

Other popular 'passive' activities at Gwaun Hepste included photography (52%), admiring the views (38%) and having a picnic or barbeque (21%) - see Table 4 below and overleaf.

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

Activities undertaken	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015 %
Cycling on forest roads, tracks or trails	-	-	1
Cycling off trails or tracks	-	1	1
TOTAL CYCLING	-	1	1
Walking on a sign-posted trail	94	86	68
Walking but not following sign-posts	15	6	28
Dog walking	20	15	24
TOTAL WALKING	98	94	91
Orienteering / Geocaching	2	-	1
Running / jogging	1	1	2
Horse-riding	-	-	<1

Activities undertaken continued	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015 %
Photography	52	20	16
Admiring the views	38	39	24
Picnic or barbeque	21	11	12
Bird watching	8	3	13
Seeing something in the forest	6	12	5
Using the café / restaurant / other catering	6	-	13
Waterfalls	6	-	1
Camping	2	-	1
A forest drive	2	-	1
Organised trip / event	2	-	3
Using the Visitor Centre / shop	1	-	8
Nature / natural history visit	1	3	5
Meet friends / family	1	-	<1
Taken part in ACTIVE activities	98	95	93
Taken part in PASSIVE activities	82	Not available	59

Base: All visitors – Gwaun Hepste 2015 (127); Gwaun Hepste 2012 (93) 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 orienteering/Geocaching (2) and running/jogging (1), these have not been commented on.

As previously mentioned; visits to Gwaun Hepste lasted 2 hours and 54 minutes on average. Those walking spent an average of 2 hours and 46 minutes doing this (most of their visit): this compares to the average time of 2 hours 34 minutes spent walking at Gwaun Hepste in 2012.

One in ten (9%) took a fairly short walk, lasting less than an hour, while a further tenth (10%) walked for between one and two hours

Most of those who took part in walking activities at Gwaun Hepste in 2015 walked for between two and five hours (78%); only 2% walked for longer than this.

Back in 2012, 30% of visitors walked for between one and two hours, with the remaining 69% walking for between two and five hours; nobody walked around the site for longer than this - see Table 5 below.

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

Time at site	Total duration of visit		Time spent on any walking	
	2015	2012	2015	2012
Up to 30 minutes	6	-	6	-
31 – 60 minutes	1	1	3	-
1 – 2 hours	12	28	10	30
2 – 3 hours	41	39	45	45
3 – 5 hours	37	29	33	24
5+ hours	3	2	2	-
Don't know	-	1	1	-
AVERAGE	2 hours 54 mins	2 hours 42 mins	2 hours 46 mins	2 hours 34 mins

Base: All respondents - 2015 (127); 2012 (93)
 Respondents who walked - 2015 (124); 2012 (86)

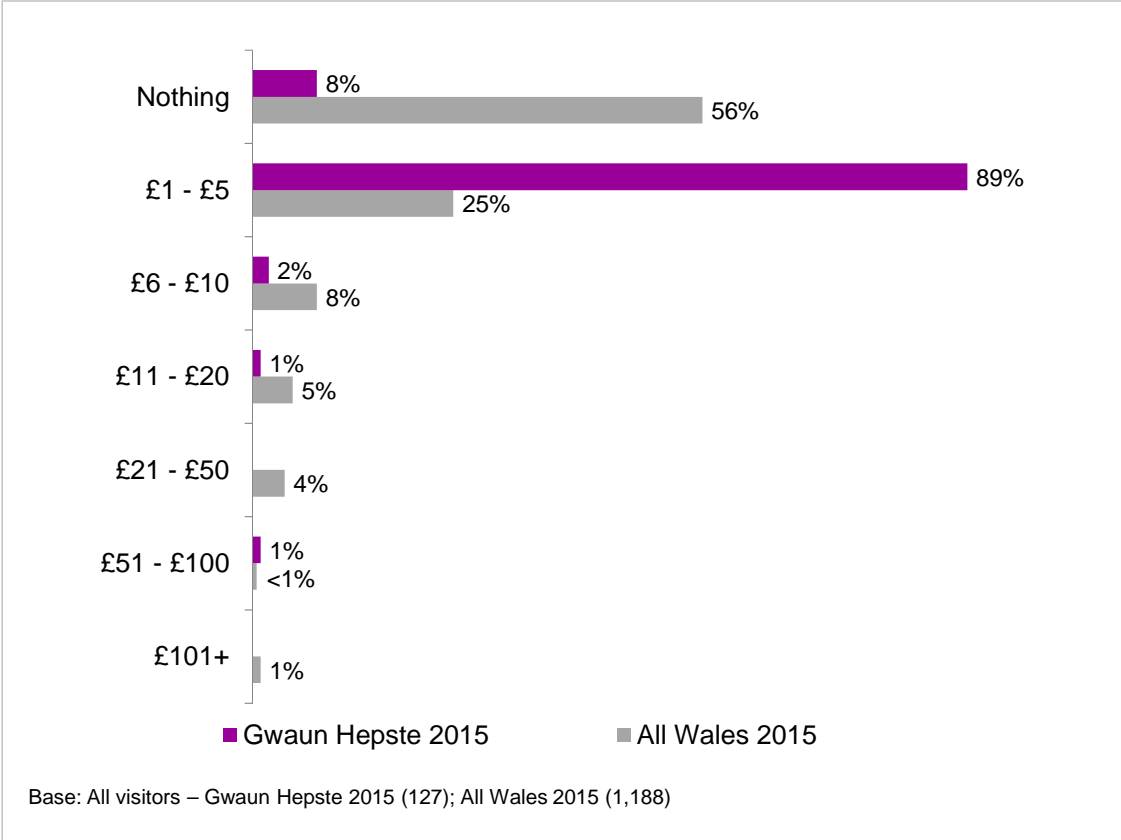
4.7 Money spent at site and in the area as a result of the visit

Visitors to Gwaun Hepste 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.

The vast majority **did** intend to spend some money at the site (92%), but amounts tended to be small, with 89% saying they would spend up to £5. The average spend was £4.42 (compared to £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 item that the highest proportion of visitors to Gwaun Hepste were likely to spend anything on (by far) was parking (92%; average £3.94 cf. £1.68 all Wales average) – 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 £	
	Gwaun Hepste %	All Wales %	Gwaun Hepste £	All Wales £
Food and drink	1	22	0.56	2.16
Activities at the site	-	1	-	1.56
Parking	92	27	3.94	1.68
Souvenirs / gifts	-	3	-	0.41
Hiring equipment	-	1	-	1.11
Anything else	2	1	0.02	0.10

Base: All visitors – Gwaun Hepste 2015 (144); All Wales 2015 (1,188)

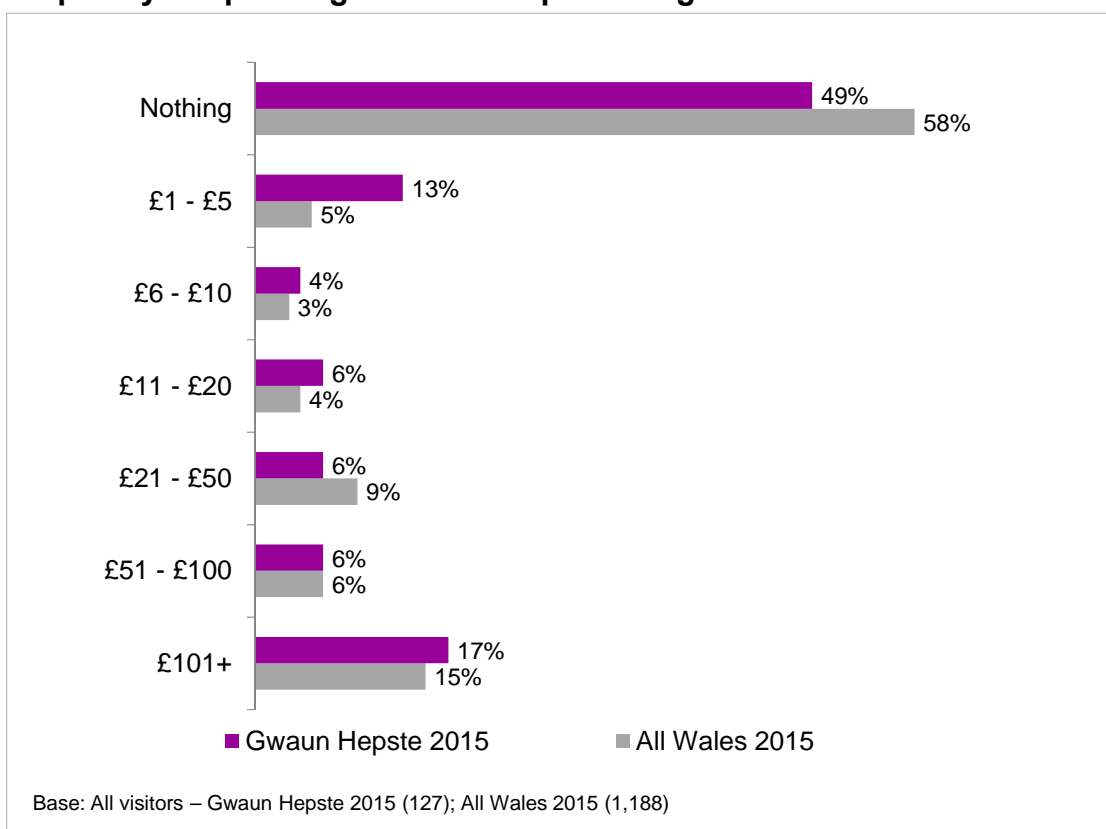
Visitors to Gwaun Hepste were also asked how much they intended to spend in the area (on a variety of things) as a result of their trip to the site. The figures seen in Figure 8 show the figures calculated by combining the data across all types of spending.

Around half of visitors to Gwaun Hepste claimed that they **would not** be spending anything in the area as a result of their trip (49%); this was lower than the all Wales average of 58% saying the same.

Amongst the half of visitors who **did** intend to spend anything in the area (51%), amounts varied considerably. Around a fifth (17%), claimed they would be spending up to £10, while at the other end of the scale, the same proportion (17%) claimed they would be spending over £101 in the area; Table 6b overleaf shows how expenditure on food / drink and accommodation are the main factors driving this large tourism spend. The average spend in the area as a result of their visit to the site was £76.72, slightly lower than the all Wales average of £87.52.

Figure 8 overleaf provides more details of the proportions of Gwaun Hepste 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 Gwaun Hepste, food and drink and accommodations were mentioned by the highest proportions of visitors (33% and 20% respectively); visitors were likely to spend £16.96 on food and drink and £52.23 on accommodations - see Table 6b below.

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

Areas of expenditure	% spending anything on items		Average spend on items £	
	Gwaun Hepste %	All Wales %	Gwaun Hepste £	All Wales £
Food and drink	33	29	16.96	21.06
Accommodations	20	19	52.23	51.81
Admissions to other attractions	1	4	0.16	3.99
Parking	15	7	1.00	1.67
Transport	15	22	6.02	9.15
Souvenirs / gifts	2	4	0.60	1.65
Hiring equipment	1	1	2.99	1.82
Anything else	-	2	-	1.02

Base: All visitors – Gwaun Hepste 2015 (127); All Wales 2015 (1,188)

5. Perceptions of the site

5.1 Overall rating of the site as a place to visit

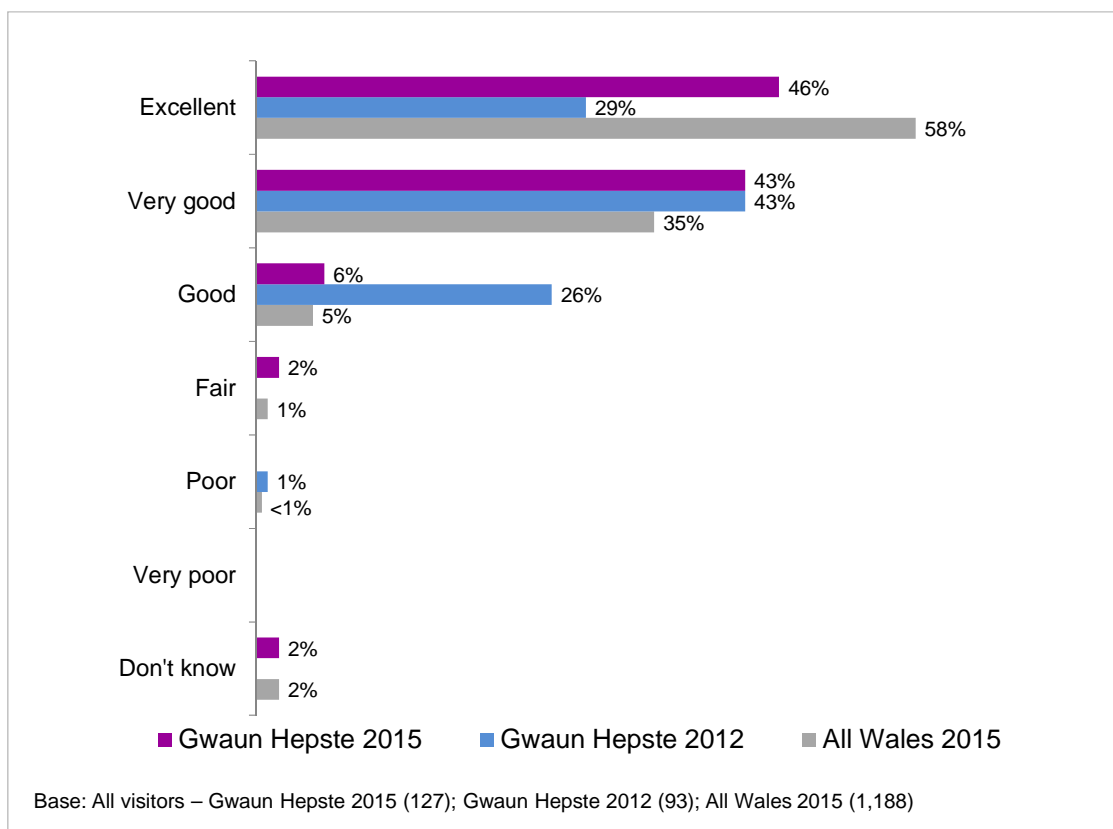
Perceptions of Gwaun Hepste as a place to visit were very positive; this was also the case across all Wales sites. In fact nobody interviewed at Gwaun Hepste in gave a negative rating of the site.

Just under half (46%) rated the site as 'excellent'; considerably higher than the data from 2012 survey (29%) but lower than the all Wales figures (58%). A further two fifths (43%) gave the site a rating of 'very good' and 6% rated it as 'good'.

Opinions on Gwaun Hepste were less enthusiastic in 2012 compared to 2015; as mentioned above, fewer people rated the site as 'excellent' (29%), and many more people felt it was simply 'good' (26%).

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 89%, up significantly from the 2012 figure of 72% – 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 Gwaun Hepste were also positive, although less so than was seen across all Wales sites. Only 1% of the visitors to this site gave a negative rating of the site in terms of it being safe and welcoming.

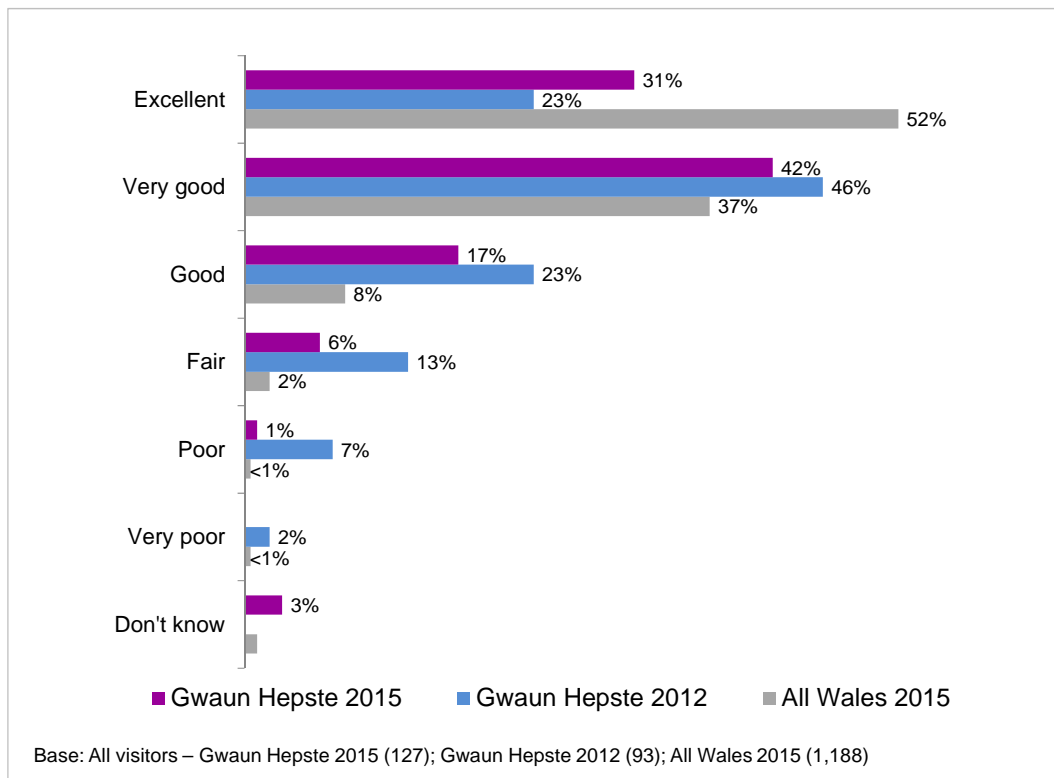
Just under a third of visitors gave this measure an 'excellent' rating (31%); this was significantly lower than the figure obtained for all Wales sites (52%), but higher than the findings from the 2012 survey (23%).

Another two fifths (42%) gave a 'very good' rating for how safe and welcoming Gwaun Hepste felt (in line with both the all Wales and 2012 figures). Just under two in ten (17%) gave a 'good' rating.

Back in 2012, a sizable minority of 22% gave the site a 'fair' or 'poor' rating in terms of how safe and welcoming it felt; this reduced to 7% in 2015.

Therefore, the proportion giving the site an 'excellent / very good' rating in 2015 stood at 73%, up slightly from the 2012 figure of 69% – 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 Gwaun Hepste and all Wales sites.

The signposting, information and maps were mentioned by most visitors (38%), followed by the safety of the environment (28%). Fewer people commented that Gwaun Hepste was a safe environment generally when compared to the all Wales average (38%).

Another 17% commented on the scenery, views and beautiful environment, while one in six said that Gwaun Hepste was peaceful, tranquil and relaxing and well laid out (15% for both).

A tenth mentioned the other visitors and the staff / rangers at the site were friendly (11% for each), or that the site was clean, tidy and well maintained (10%).

Only a small number of comments were received on this in 2012 - 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	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015%
Well signposted / good maps / information boards	38	11	26
Safe environment generally	28	-	38
The scenery / views / beautiful environment	17	3	40
Peaceful / pleasant / tranquil / relaxing / welcoming	15	-	34
Well laid out / well organised / good set up	15	2	27
Other visitors here are friendly	11	-	10
Friendly / helpful staff or rangers	11	5	8
Clean / tidy / well maintained / litter free	10	6	23
Good provision of paths, trails and tracks	6	-	21
Fresh air / open space / freedom	4	-	24

Reasons for a positive rating of site continued..	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015 %
Good, safe place for the kids to play and run around	3	-	14
Good quality facilities or amenities	3	-	12
Good car parking (good with horse box)	3	2	3
Waterfalls	3	-	<1
Easily accessible for wheelchairs / pushchairs	3	-	1
Away from roads / no cars / cars drive slowly	2	-	1
Plenty of staff / rangers	2	-	<1
Plenty of other people around	2	-	1
Don't know	2	-	3
General positive comments	3	24	3
Some negative comments	9	-	5

Base: Visitors rating the site as excellent, very good or good – Gwaun Hepste 2015 (115); Gwaun Hepste 2012 (63); 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):

- Live locally / convenient / easy to get to
- Not too crowded / not too busy (walkers / cyclists)
- Needs better signage (more description / clearer / more signs in general).

5.3 Recommending the site as a place to visit

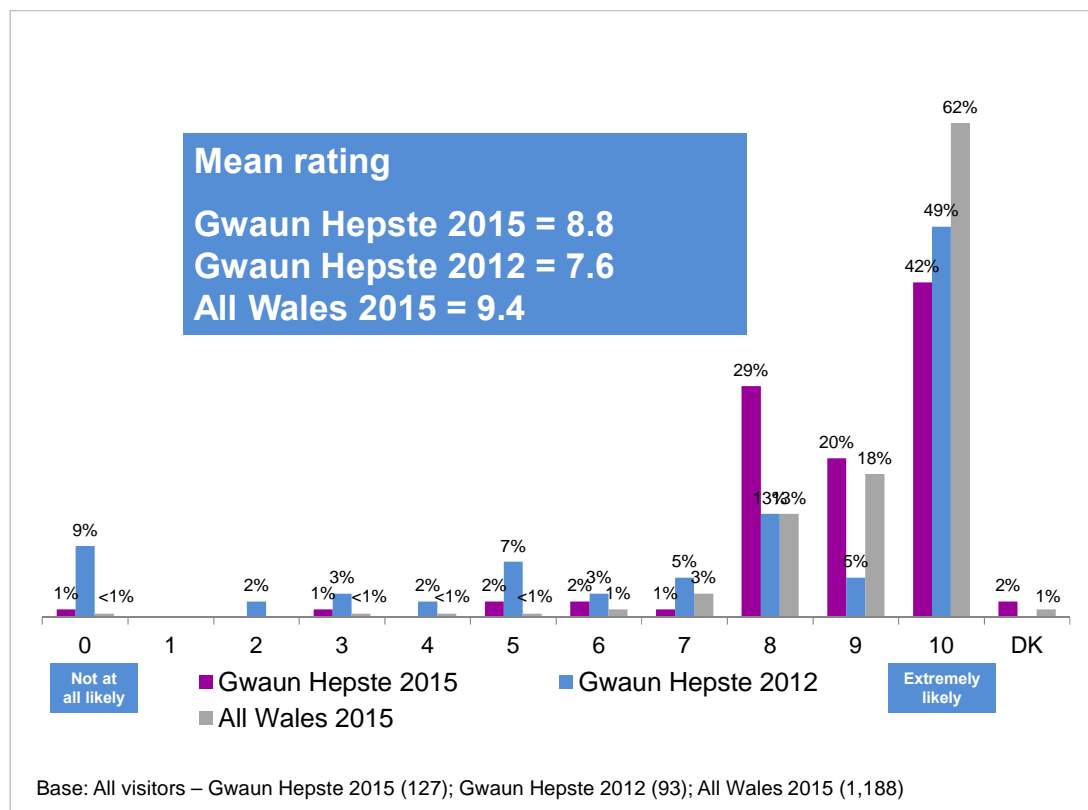
Visitors were asked whether they would be likely to recommend Gwaun Hepste as a place to visit to a friend or relative, using a score of 0-10, where zero equalled 'not at all likely' and 10 equalled 'extremely likely'.

Scores for Gwaun Hepste and all Wales sites generally were extremely positive: only 7% gave a rating of less than 8/10 for Gwaun Hepste, which was considerably lower than the 2012 position, when 31% 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 Gwaun Hepste in 2015 (49%) compared to the previous survey (18%) or the all Wales average (31%). And while there were fewer negative ratings at this site than was seen previously, the proportion giving the highest rating of 10/10 dropped from 49% to 42% (both figures being lower than the 2015 all Wales average of 62%).

Reflecting the change in the distribution of scores, the mean rating for Gwaun Hepste stood at 8.8, considerably higher than the 2012 average rating of 7.6, but lower than the all rating of Wales at 9.4 – see Figure 11 below.

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



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

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

To calculate the NPS, the percentage of ‘Detractors’ is subtracted from the percentage of ‘Promoters’ to produce a net score. The NPS for Gwaun Hepste is 56, which is markedly lower (by 23 points) than the all Wales score of 79, but significantly higher (by 27 points) than the 2012 NPS score of 29 for this site.

5.4 Strengths of the site

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

Two favourite things about Gwaun Hepste stood out; the most mentioned (by nearly half) were the rivers, creeks, waterways and waterfalls (48%) and the scenery and beautiful views (46%). A third (33%) mentioned the peace and tranquillity of the site, followed by a fifth mentioning the walks, paths and trails (21%).

The distribution of comments for Gwaun Hepste varied when compared to both the all Wales averages and the previous research. For example, many more people were inclined to speak of the water features in the recent survey, compared to both the previous survey and the all Wales average (27% and 10% respectively), while fewer people spoke of the scenery and beautiful views (73% in 2012; 62% across Wales).

Moreover, almost double the proportion of visitors to Gwaun Hepste in 2012 mentioned the peace and tranquillity of the site (73%) compared to the recent survey (46%) - see Table 8 below for more details.

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

Favourite things about the site	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015 %
Rivers / creeks / waterways / waterfalls	48	27	10
Scenery / views / beautiful/ natural / non-commercial	46	73	62
Peace / tranquillity / relaxation / atmosphere	33	63	56
Walks / paths / trails	21	44	42
Like forests / trees / variety of trees / plants	14	8	16
Fresh air / being outside	8	13	24
Well signposted / good maps / information boards	8	-	2
Wildlife / bird watching	4	8	21
Clean / well looked-after	4	3	16
Safe environment	3	5	9
Good accessibility	3	-	3
Exercise / keeping fit	2	6	15
Everything	2	-	<1
Close to home / convenient / location	2	4	16
Lots to see and / or do	2	-	5

Favourite things about the site	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015 %
The weather	2	5	3
Friendly people	2	-	<1
Something different / a change	2	-	1
Nothing	1	-	<1
Don't know	1	-	<1

Base: All visitors – Gwaun Hepste 2015 (127); Gwaun Hepste 2012 (93) All Wales (1,188).

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

- Cycle trails / opportunity / freedom to cycle
- Opportunity to spend time with family / friends / family friendly
- Good on-site facilities / BBQ areas / Gift Shop
- Been before / wanted to come again
- Plenty / cheap / other reference to parking
- Good value for money / cheap / free
- Open space / plenty of space
- Not crowded / not too many people
- Remote / away from cars / no traffic
- Challenging environment / wilderness.

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 Gwaun Hepste, the slight majority of visitors felt that something could be improved at the site (56% cf. 47% overall).

Most of the comments received related to a need to improve the toilets and changing facilities at the site (20%), while a tenth called for better parking and signage around the site (10% and 9% respectively) and a need for catering to be provided (7%).

Roughly one in twenty would like to see more litter bins and more picnic areas (6% for each) – see Table 9 overleaf.

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

Suggested improvements	Gwaun Hepste 2015 %	All Wales 2015 %
Nothing / general positive comments	44	53
Improve toilets / more toilets / shower facilities / changing area	20	8
Better parking (easier, more, cheaper, free)	10	4
Improve signage / more maps / better maps	9	6
Provide café / catering / refreshments	7	4
More bins / litter bins / recycling bins / less litter	6	9
More picnic areas / BBQ / picnic tables and benches	6	2
More seating	4	3
More dog poo bins / remove dog poo	2	9
More information on wildlife / vegetation / area	2	2
Don't know	3	1

Base: All visitors – Gwaun Hepste 2015 (127); All Wales (1,188).

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

- Improve catering
- Improve maintenance of paths / cycle tracks / better surfacing
- More activities for children / more play areas
- Better weather / more sunshine
- Have cashpoint / accept card payments
- Better access / make more accessible (including disabled access).

In 2012, over two fifths (44%) said 'nothing' would enhance the enjoyment of their visit. The most commonly mentioned enhancements related to facilities (41%) or improving the environment in some way (15%), whilst 2% mentioned activities. Another 17% of visitors mentioned more / better toilet facilities with 11% mentioning the cafe or refreshments.

Returning to the recent research; when asked if there was anything that interfered with their enjoyment of their visit to Gwaun Hepste, over half (55%) reported that nothing had. However, this was lower than the proportion saying the same at all Wales sites (68%), again illustrating that visitors to Gwaun Hepste found more issues with this site compared to all Wales sites in general.

Again, most comments related to issues with the toilets and changing facilities (15%), with another 10% saying that the unclear signage around that site had affected the enjoyment of their trip.

Other issues were mentioned by smaller proportions of visitors, and included such things as poor weather, expensive parking (5% for each) and a lack of litter bins (4%) – see Table 10 below.

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

Problem areas	Gwaun Hepste 2015 %	All Wales 2015 %
Nothing	55	68
Toilets – not enough / closed / out of order / cleaner toilets / no changing	15	4
Signs unclear / need better signs / more maps	10	3
Wet / raining / windy (poor weather)	5	8
Car parking expensive / should be free parking	5	1
Need more litter bins / recycling bins / too much litter	4	5
Dog mess on the paths / in play areas	2	4
Problems with car parks / faulty machines / limited spaces	2	2
Dogs off leads / loose dogs / don't want dogs around	2	1
Need more dog poo bins	2	1
Don't know	2	<1

Base: All visitors – Gwaun Hepste 2015 (127); All Wales (1,188).

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

- Need more seating
- No café
- Complaints about other visitors
- Tree felling / chopping down too many trees.

In 2012, the vast majority of visitors could not think of anything that had interfered with their enjoyment of their visit (88%). Comments mentioned by more than one person related to:

- Lack of / poor signage (3%)
- Car parking issues (2%).

6. Site facilities

6.1 Importance of site facilities

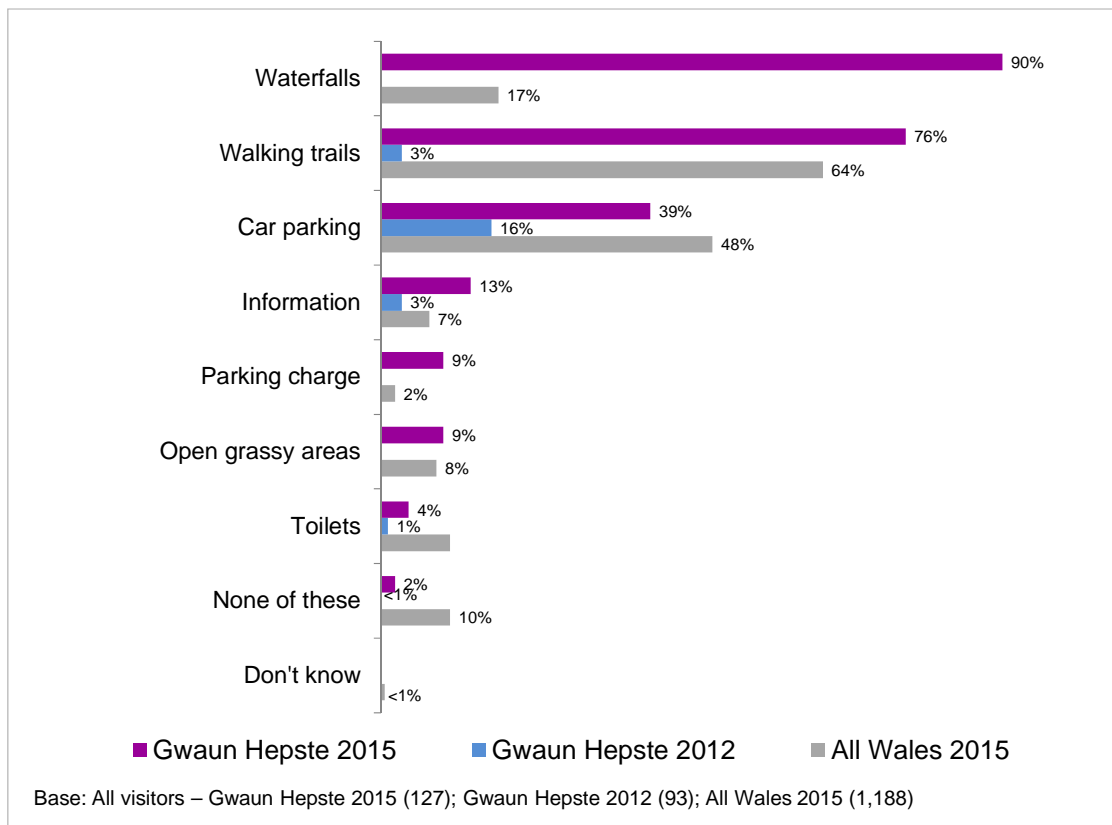
Visitors were presented with a list of facilities available at Gwaun Hepste and asked which ones were important to their decision to visit; visitors could mention as many facilities as were applicable.

On the whole, there were many more comments received in 2015 compared to 2012; waterfalls were mentioned by the vast majority of visitors in the most recent survey (90%), although these were not mentioned at all in 2012.

Walking trails were also mentioned by a high proportion of visitors to Gwaun Hepste in 2015 (76%), but just 3% in 2012. Mentions of waterfalls and walking trails were also higher at Gwaun Hepste in 2015 compared to the all Wales average (17% and 64% respectively).

Car parking was mentioned by just under two in five visitors (39%), again much higher than the 2012 figure of 16% but lower than the all Wales average of 48% – 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 a quarter of visitors when choosing to come to the site (27%). Only a relatively small proportion of visitors mentioned each factor, and those mentioned by more than 2% of visitors are outlined below.

The fact that people were just passing was mentioned by 4% of visitors, while the convenience of the location (being close to home) was mentioned by 3%. A further 3% reported that a family member, friend of owner of a B&B (presumably where they were staying) had recommended the site as a place to visit – see Table 11 below for more details.

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

Spontaneous mentions	Gwaun Hepste 2015 %	All Wales 2015 %
Nothing	73	53
Was just passing by / en route / was in the area	4	5
Live locally / convenient / easy to get to / easy access / close to me	3	5
Friend / family / owner of B&B recommended it / word of mouth	3	2
Meeting / visiting with family and friends (bring family)	2	3
Beautiful scenery / views / natural beauty	2	4
Good weather / sunny / warm	2	3
Good for the children / children like it / can run around and play	2	3
Good facilities	2	4

Base: All visitors – Gwaun Hepste 2015 (127); All Wales (1,188)

Other factors were mentioned by one or two visitors:

- Site specific event
- Shaded areas
- Dog friendly / dogs can come off leads / dog facilities
- Outdoors / fresh air / open spaces
- A good / nice day out
- Relaxing / peaceful / tranquil / quiet
- Been before / come here a lot / good memories
- Close to where I am staying (staying visitors) / parents live locally
- Wanted to go walking / cycling
- Good value for money / cheap / free.

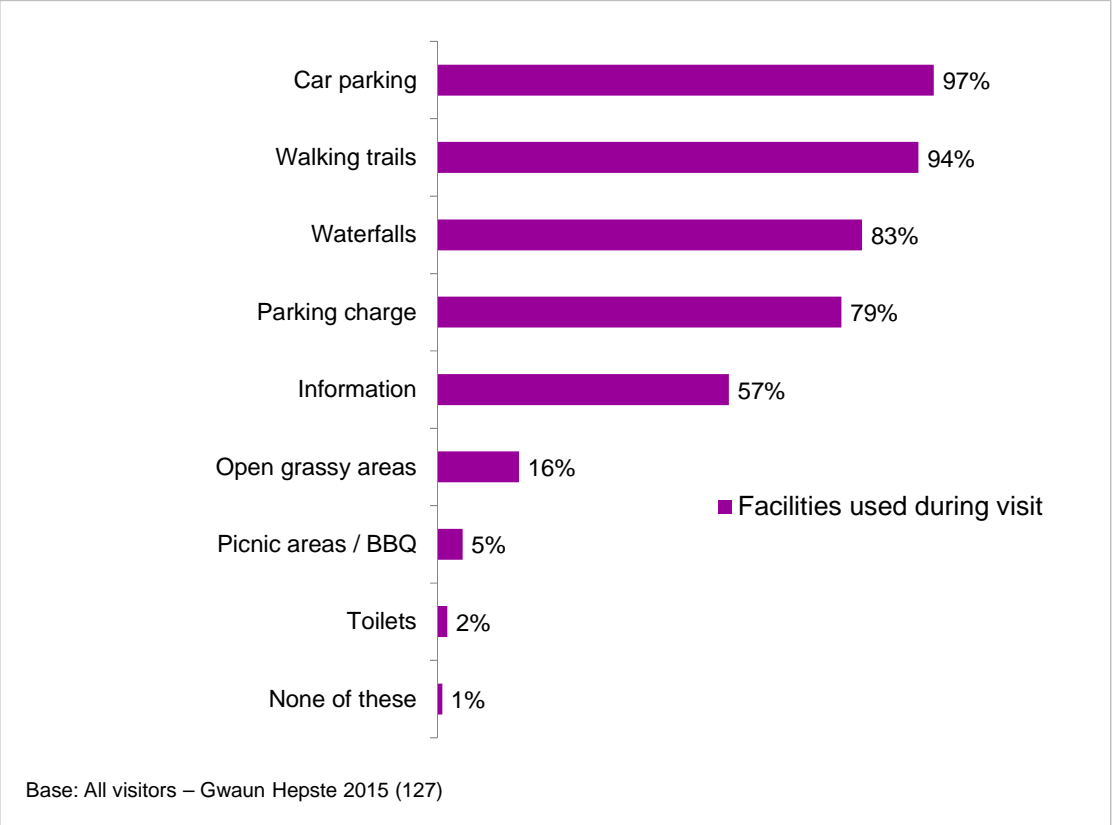
6.2 Facilities used

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 (97%) and walking trails (94%) were used by the vast majority of visitors, followed by waterfalls (83%) and the parking charge (79%).

Information was used by three in five visitors (57%); other facilities or features were used by smaller proportions, including 16% using the open grassy areas, just 5% using the picnic areas and 2% the toilets - see Figure 13 below for more details.

Figure 13: Q15a. Facilities used at Gwaun Hepste 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 Gwaun Hepste 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’.

The features that received the highest score, by far, were the waterfalls. Over three quarters of ‘users’ rated these as ‘excellent’ (77%), with another 19% rating them as ‘very good’. The remaining 4% rated them as ‘good’, with no negative ratings being received for these features of the site.

The walking trails were considered ‘excellent’ by nearly half of users (45%); for the information and car parking, perceptions were less positive, with only a fifth considering these to be ‘excellent’ (21% and 20% respectively).

One particular facility of the site stood out as having very high levels of dissatisfaction; this was the parking charge. Over a third of users rated this as ‘poor’, which was much higher than was seen for any other aspect at this site. Moreover, no other facility at any of the sites in Wales had such high levels of dissatisfaction; 43% of visitors though that the parking charge was too high - see Figure 14a below.

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

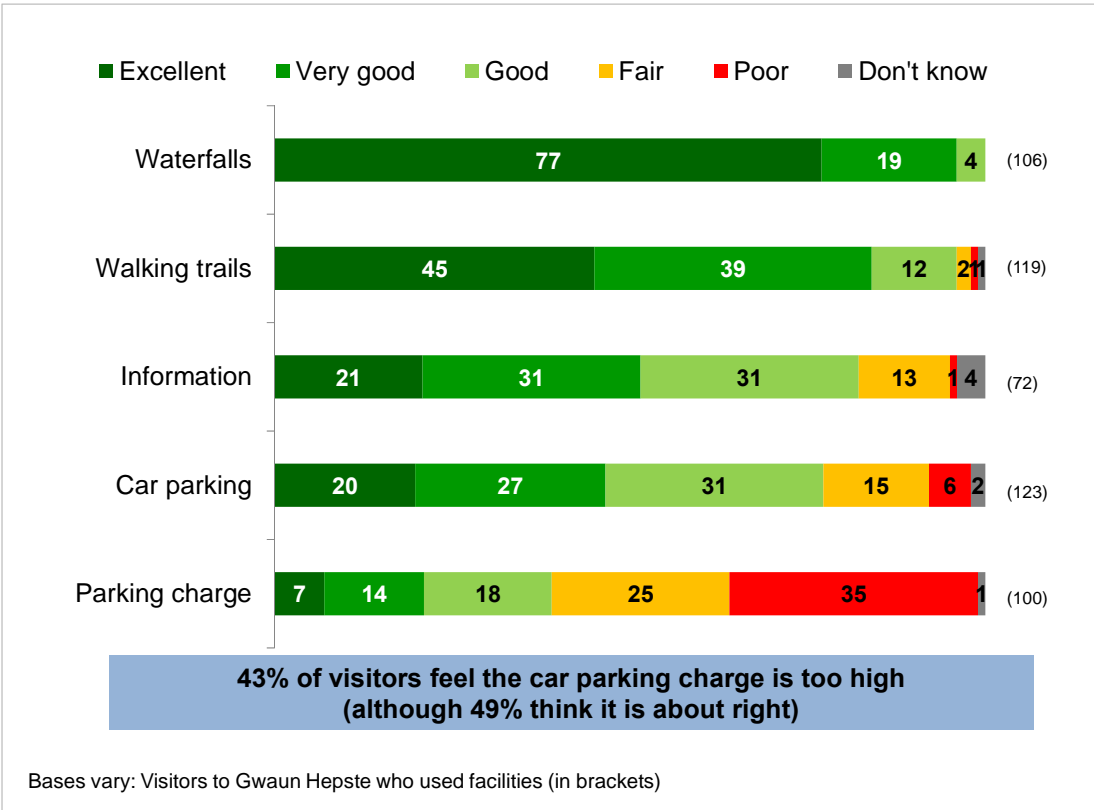


Table 12 compares the proportions giving 'excellent' ratings to the facilities used in 2014 compared to 2012, where they were mentioned in the previous survey.

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 Gwaun Hepste as 'Excellent' 2014 vs. 2012

Facilities	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	% point change
Information	21	19	+2
Car parking	20	14	+6

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

7. Sources of information used to plan visit

Visitors were asked where they found out about Gwaun Hepste 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 a third of visitors to Gwaun Hepste heard about the site through word of mouth (35%); this was similar to the results for 2012 (38%), but slightly higher than the all Wales average (21%). A fifth (20%) had always known about the site (down from 39% in 2012); this compares to over half of visitors to all Wales sites saying the same (52%).

Google / internet searches were used by 16%, while a tenth found out about Gwaun Hepste from a Tourist Information Centre (10%). Several other sources of information were mentioned by smaller proportions of visitors, including maps and general websites (9% for each), leaflets (6%), TV (4%), guide books, road signs and the NRW website (2% 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	Gwaun Hepste 2015 %	Gwaun Hepste 2012 %	All Wales 2015 %
Word of mouth	35	38	21
Always known about it / been here before	20	39	52
Google / other search engine	16	13	7
Tourist Information Centre	10	5	2
Map	9	4	4
Websites	9	-	5
Leaflet	6	-	4
TV	4	-	1
Just passing / en route	2	2	5
Book / guide book	2	-	2
Road signs	2	1	6
Natural Resources Wales website	2	-	<1

Base: All visitors – Gwaun Hepste 2015 (127); Gwaun Hepste 2012 (93) All Wales (1,188).

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

- Forestry Commission website
- Live locally
- Magazine (unspecified).

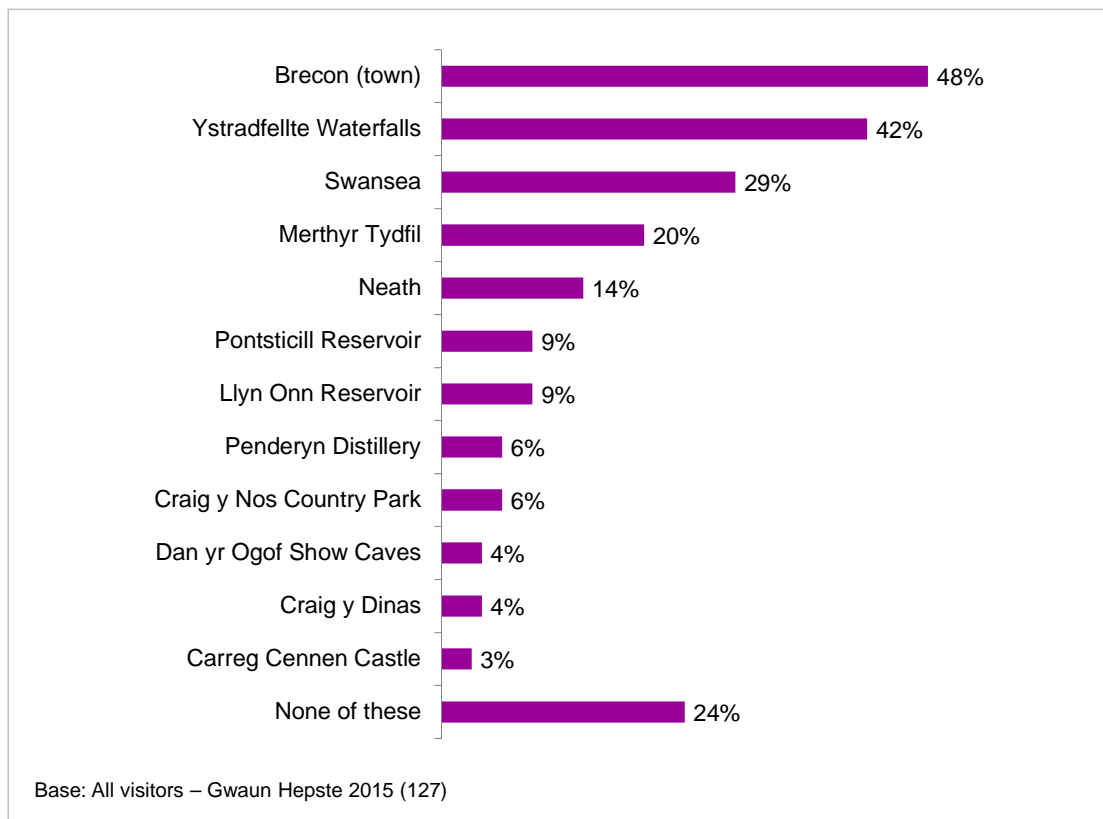
8. Visiting other areas and attractions

Visitors to Gwaun Hepste 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 (95%) had visited at least one.

Brecon town and Ystradfellte Waterfalls stood out as the two locations that had been visited by most of those coming to Gwaun Hepste (48% and 42% respectively), followed by Swansea (29%) and Merthyr Tydfil (20%).


Around one in ten had visited Pontsticill and Llyn Onn Reservoirs (9% for each), while smaller proportions had visited attractions such as Penderyn Distillery, Craig y Nos Country Park (6% for each) and the Dan yr Ogof Show Caves (4%) – see Figure 15 below for more details.

Figure 15: Q19. Other areas / attractions visited 2015



Appendix I

Questionnaire

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

APPROACH ADULTS AGED 16+ - READ OUT

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

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

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

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

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

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

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

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

(7)
1
2
3

IF SPEAK WELSH, ASK S3 BEFORE CONTINUING WITH INTERVIEW

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

- English
- Welsh

(8)
1
2

ASK ALL

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

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

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

SHOWCARD A

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

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

(17)

1
2
3
4
5

SHOWCARD B

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

First visit

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

(18)

1

2
3
4
5
6
7
8
9

ASK ALL

SHOWCARD C

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

PROBE - Any others?

RECORD IN FIRST COLUMN IN GRID BELOW - CODE ALL MENTIONED

ONLY ASK Q4b IF MORE THAN ONE PERSON IN GROUP

SHOWCARD C AGAIN

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

RECORD IN SECOND COLUMN IN GRID BELOW - CODE ALL MENTIONED

ASK ALL

SHOWCARD C AGAIN

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

RECORD IN THIRD COLUMN IN GRID BELOW - CODE ALL MENTIONED

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

ASK ALL

SHOWCARD D

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

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

Don't know

(45)

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

INSTRUCTIONS:

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

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

SHOWCARD D AGAIN

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

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

ASK ALL

SHOWCARD E

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

ASK ALL

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

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

Other (please specify) (79-82m)

Nothing L

Don't know M

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

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

Other (please specify) (87-90m)

Nothing L

Don't know M

ASK ALL

SHOWCARD F

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

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

Don't know / not sure

(95)

1 }
2 } **Q12**
3 }
4 }
5 }
6 }

7 → **Q13**

ASK Q12 IF CODED 1-6 AT Q11

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

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

(96-99m)

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

Other (please specify)

(100-103m)

Don't know

M

GWAUN HEPSTE

ASK ALL

SHOWCARD G4

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

CODE ALL MENTIONED

		(105-108m)
A	Car parking	C
		(109-112m)
B	Information available / interpretation	5
C	Open grassy areas	9
D	Parking charge	B
E	Picnic areas / BBQ	C
F	Toilets	K
G	Walking trails	O
		(113-116m)
H	Waterfalls	1

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

Nothing

Don't know

(117-120m)

(121-124m)

M

N

GWAUN HEPSTE

ASK ALL

SHOWCARD G4 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 CIRCLE IF USED	Q15b - COLUMN B ONLY RATE THOSE TICKED IN COLUMN A							
			Excellent	Very good	Good	Fair	Poor	Very poor	DK	
		(125-128m)								
A	Car parking	C	1	2	3	4	5	6	7	(151)
		(129-132m)								
B	Information available / interpretation	5	1	2	3	4	5	6	7	(168)
C	Open grassy areas	9	1	2	3	4	5	6	7	(172)
D	Parking charge	B	1	2	3	4	5	6	7	(174)
E	Picnic areas / BBQ	C	1	2	3	4	5	6	7	(175)
F	Toilets	K	1	2	3	4	5	6	7	(183)
G	Walking trails	O	1	2	3	4	5	6	7	(187)
		(133-136m)								
H	Waterfalls	1	1	2	3	4	5	6	7	(188)
OTHERS (WRITE IN)										
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()
			1	2	3	4	5	6	7	()

None of these
 Don't know

M
 N

ASK ALL

SHOWCARD H AGAIN

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

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

Don't know / not sure

(235)

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

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

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

(236)

SHOWCARD I

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

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

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

SHOWCARD J

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

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

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

GWAUN HEPSTE

FOU: (335-369 FOR Q19)

ASK ALL

SHOWCARD K4 (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

- Brecon (town)
- Carreg Cennen Castle
- Craig y Ddinas (waterfalls/forest)
- Craig y Nos Country Park
- Dan yr Ogof Show Caves
- Llwyn Onn Reservoir
- Merthyr Tydfil (town)
- Neath (town)
- Penderyn Distillery
- Pontsticill Reservoir
- Swansea (town)
- Ystradfellte Waterfalls

- None of these
- Don't know

(350-353m)

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

- L
- M

FOU: (370-410 FOR Q20)

Q20 Thinking about how much you pay for parking here, do you think it is...?

READ OUT – SINGLE CODE

- Too much
- About right
- Too little

- NA – have not paid for parking

- Don't know

(385)

- 1
- 2
- 3

- 4

- 5

ASK ALL

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

Q21 INTERVIEWER RECORD GENDER

- Male
- Female

(415)
1
2

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

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

Refused

(416)
1
2
3
4
5
6
7

SHOWCARD M

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

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

Refused

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

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

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

Job title _____

Position / Grade _____

- AB
- C1
- C2
- DE

Refused

(418)
1
2
3
4
5

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

ASK Q28a AT ENGLAND SITES ONLY

SHOWCARD O (E) AND PURPLE ENGLAND MAP

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

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

- Wales
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(425)

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

- A
- B
- C
- D

X

Z

ASK Q28b AT WALES SITES ONLY

SHOWCARD O (W) AND WALES MAP

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

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

- England
- Scotland
- Northern Ireland
- Abroad

Other (please specify) _____

Refused

(426)

- 1
- 2
- 3
- 4
- 5

- 6
- 7
- 8
- 9

X

Z

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

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

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

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

Appendix II

Explanation of social class categories

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

AB

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

C1

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

C2

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

DE

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

enquiries@beaufortresearch.co.uk
www.beaufortresearch.co.uk