

Report prepared by



UPPER SWANSEA VALLEY VISITOR SURVEY RESULTS 2006 & 2007

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Survey commissioned by



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INTRODUCTION

This report presents the findings of a programme of research carried out by the Brecon Beacons National Park Authority (BBNPA) Tourism Growth Area in partnership with the Sleeping Giant Foundation and Tourism Partnership Mid Wales. The research aimed to investigate the characteristics of visits and visitors to the Upper Swansea Valley area.

OBJECTIVES

The objectives for the survey were threefold.

- To gain insights into the characteristics and satisfaction of current visitors to the Upper Swansea Valley
- Explore the characteristics of different types of visitors
- To inform future tourism planning for the Upper Swansea Valley as part of wider promotion of the Brecon Beacons Tourism Growth Area

METHODOLOGY

Having discussed alternative methodologies, the client adopted a self-completion survey strategy. Between March 2006 and October 2007, several hundred self-completion questionnaires were distributed by volunteers and BBNPA staff to a number of locations in and around the Upper Swansea Valley, including shops, visitor attractions and Tourist Information Centres.

Visitors could choose either to complete the questionnaire there and then, handing it back to a member of staff, or to use a freepost envelope to post it back.

SAMPLE SIZE

A total of 87 questionnaires were returned using the methods listed above.

RESULTS

This chapter presents the main findings of the research. One of the objectives for this study was to examine the characteristics and satisfaction of the different types of visitors; specific segments that were investigated included:

- *Day visitors from home* – those travelling from and back to home in the same day for leisure purposes
- *Holiday day visitors* – those taking a day trip to the Upper Swansea Valley whilst on holiday elsewhere in the area
- *Short break-takers* – those staying 3 nights or less in Upper Swansea Valley
- *Longer break-takers* – those staying four nights or more in the Upper Swansea Valley

The table below provides a breakdown of the different types of visitor included in our sample

Table 1. *Characteristics of sample*

	Sample size	% of total sample
Staying Visitors	51	59%
- Short breaks (3 nights or less)	10	11%
- Longer break	26	30%
- Day trip whilst staying on holiday elsewhere	15	17%
Day Visitors	33	38%
- lasting less than 3 hrs	11	13%
-lasting more than 3 hours	22	25%
Other/no answer	3	3%
TOTAL SAMPLE	87	

As the table shows, in our sample, staying visitors outnumbered day visitors by almost two to one (59% compared with 38%). Those on longer breaks were the most common type of staying visitor (30% of the total sample) with short break takers accounting for 11%. Holiday day trippers accounted for 17% of the total sample. Day trippers were made up of those visiting for less than 3 hours (13%) and those visiting for longer than this (25%). The remainder of the respondents were the 3% who were either on other types of trip (e.g. touring, visiting friends or relatives) or who gave no answer to the type of trip they were taking.

The small sample size means that the remainder of the report concentrates on presenting the results for the whole sample. In some places, separate figures for day and staying visitors have been given but these should be treated with some caution due to the small numbers of respondents involved.

CHARACTERISTICS OF SAMPLE

The proportion of male and female visitors responding was fairly even (54% female, 46% male). The age profile of the respondents is summarised in the table below. Although there was a good overall spread of ages, there was an emphasis on older visitors, with 60% of respondents being aged 45 years or over.

Table 2. Age profile of respondents

Age	% of all respondents
16-24	5%
25-34	6%
35-44	21%
45-54	24%
55-64	22%
65+	14%
No answer	9%

Note: Figures are rounded so do not add up to 100%

Origin of visitors

Table 3. Origin of visitors

Where are you from?	All respondents	Day-trippers	Staying visitors
Wales	38%	88%	6%
London & SE England	19%	0%	31%
West Midlands	13%	6%	18%
SW England	7%	6%	8%
East of England	5%	0%	8%
NW England	5%	0%	8%
Overseas	5%	0%	8%
North East	1%	0%	3%
East Midlands	1%	0%	2%
Yorks	0%	0%	0%
Scotland	0%	0%	0%
Ireland	0%	0%	0%
Don't know / no answer	0%	0%	0%
Other	6%	0%	10%

Note: Rounding of percentages means that totals may not add up to 100%

▶ **London and the South East was the most likely place for staying visitors to come from**

Just under one third of staying visitors were visiting from London and the South East. The next most popular source market was the West Midlands with 18% of staying visitors. Just under one in ten (8%) staying visitors was from overseas

▶ **Nearly all day visitors were from Wales**

Almost nine out of ten (88%) day visitors were from this or other parts of Wales. The only other places from which day visitors were drawn were the West Midlands and South West England (each with 6% of day visitors).

VISIT CHARACTERISTICS

The following section looks at the visit characteristics of visitors to the Upper Swansea Valley.

Group size and composition

Respondents were asked about who they were visiting with. The table below provides some of the details.

Table 4. *Size of party*

	All respondents	Day visitors	Staying visitors
1	7%	7%	6%
2	39%	33%	41%
3	15%	19%	12%
4	30%	33%	29%
5	3%	4%	3%
6 and over	7%	4%	9%
Average party size	3.11	2.96	3.18

▶ **The average party size was just over 3 people**

Day visit groups were very slightly smaller than those of staying visitors (an average size of 2.96 people, compared with 3.18 people for staying visitors).

▶ **The most common party size was two people**

The largest single grouping was two people (39%). This was the case both for day visitors and those staying overnight (33% of day visitors fell into this category and 41% of staying visitors).

- ▶ **Although, on average, staying visitor groups were larger, they were more likely than day visitors to be in small groups of two or less**

Just under half (47%) of staying visitors fell into this category, compared with 40% for day visitors.

- ▶ **Day visitors were more likely to be part of groups with children**

The table below shows that over half (51%) of all day visitors were part of groups that contained children. This compared with just under a third (32%) of staying visitor groups.

Table 5. *Composition of groups*

	All respondents	Day visitors	Staying visitors
Children in group	41%	51%	32%
Adult only parties	55%	46%	64%
No answer	4%	3%	4%

Transport used

Table 6. *Mode of transport used*

	All respondents	Day visitors	Staying visitors
Car	98%	97%	98%
Bus / coach excursion	2%	3%	2%
Bicycle	0%	0%	0%
Regular bus / coach	0%	0%	0%
Walk	0%	0%	0%
Motorcycle	0%	0%	0%
Other	0%	0%	0%

Cars were the transport mode for virtually every visitor in our survey (98%). The only non-car users were those who used a bus or who were part of a coach excursion (3% of day visitors and 2% of staying visitors).

Accommodation

Staying visitors were asked to provide details of the main type of accommodation used during their visit and also asked to say through what method they booked the accommodation. The table overleaf provides the details.

Table 7. Main accommodation used during visit (all staying visitors)

Type of accommodation	% of all staying visitors
Rented self-catering / serviced apartment	31%
Guest house / B&B/ farm	22%
Home of friends and family	16%
Hotel / motel/ inn	8%
Hostel	6%
Touring / motor van	4%
Camping	4%
Bunkhouse	0%
Caravan – static – owned	0%
Caravan – static – rented	0%
No answer	10%

No. who answered this question = 47 (Small sample size means that caution should be exercised when interpreting results). Note: Rounding of percentages means that totals may not add up to 100%

► **There was a fairly even split between those staying in serviced and non-serviced accommodation**

Rented self-catering / serviced apartments was the single most popular form of accommodation, accounting for just under one third (31%) of the total sample. Guest house/ B&B/farm accommodation was the second most used type of accommodation, used by just over one in five (22%) of our sample. Using the home of friends and family was also a significant choice (16%).

Looking at how staying visitors booked their accommodation, the table below presents the details.

Table 8. Booking method for accommodation

Booking method	% of all staying visitors
Directly with accommodation establishment	35%
Internet	27%
Didn't book in advance	16%
Through Travel Agency / Tour Operator	4%
Other	2%
National Park Visitor Centre	0%
Through Central Reservation Services	0%
No answer	16%

No. who answered this question = 43. (Small sample size means that caution should be exercised when interpreting results). Rounding up/down means that percentages may not add up to 100%

► **Dealing direct with accommodation providers was the most popular way to book accommodation**

Over one third (35%) of the sample booked their accommodation directly with the accommodation provider. It is also likely that a significant proportion of the 27% who said that they had booked via the internet had also booked directly.

Intermediaries of all kinds (e.g. travel agencies, central reservation services and the National Park Visitor Centre) had little role to play.

Reason for visit

As the table below illustrates, a wide range of factors lay behind visitors' decisions to visit the Upper Swansea Valley.

Table 9. *Reasons for visit (all respondents)*

Reasons	All respondents	
	Main reason	Influences
Scenery/ landscape / countryside	24%	29%
National Showcaves	18%	14%
Craig y Nos Country Park	17%	14%
Activities	14%	18%
Previous experience	13%	16%
Visiting friends & relatives	11%	9%
To visit a visitor attraction	10%	8%
Peace and quiet	8%	26%
Easy to get to	8%	17%
Other	6%	1%
Recommendation	5%	5%
Historic interest	3%	9%
Just passing through	2%	1%
To attend a sporting event	1%	1%
Buying local arts and crafts	0%	0%
Shopping	0%	1%
Buying local produce	0%	2%
Event / festival	0%	1%

Note: Total percentages exceed 100% due to multiple answers.

► **Attractions and the area's natural environment were the most likely to be cited as the main reasons for visiting the area**

In terms of attractions, the National Showcaves was the single most popular attraction, with 18% saying it was their main reason for visit. Craig y Nos Country Park was only just behind; it was the motivation for 17% of visits. 10% of visitors said another visitor attraction was the main reason for visit. The landscape, countryside or scenery was responsible for almost a quarter (24%) of all visits.

The desire to undertake an activity was behind over one in seven (14%) visits.

At the other end of the spectrum, it would appear from our survey that few visitors were primarily motivated by events, shopping or the desire to buy local arts, crafts or produce.

Looking at the responses of day visitors as against staying visitors we can see some interesting differences between the two types of visitor.

Table 10. *Main Reasons for visit (day-trippers versus staying visitors)*

Reasons	Main reason(s)	
	Day visitors	Staying Visitors
National Showcaves	31%	9%
Craig y Nos Country Park	25%	11%
Scenery/ landscape / countryside	19%	26%
To visit a visitor attraction	17%	6%
Easy to get to	14%	4%
Previous experience	11%	15%
Peace and quiet	8%	7%
Other	8%	4%
Activities	6%	19%
Visiting friends & relatives	6%	17%
Recommendation	3%	7%
Historic interest	3%	4%
Just passing through	3%	2%
To attend a sporting event	3%	0%
Buying local arts and crafts	0%	0%
Shopping	0%	0%
Buying local produce	0%	0%
Event / festival	0%	0%

Note: Percentages exceed 100% due to multiple answers

► **Ease of access was much more important for the day trip market**

Amongst day visitors, 14% said that it was the ease of access that motivated their visit. This compares with just 4% of staying visitors.

► **Visitor attractions were much more of a draw for day visitors**

For instance, amongst day visitors the National Showcaves and Craig y Nos Country Park represented the first and second rated reasons for visits. For staying visitors, the pull of attractions such as these was less than scenery, activities and visiting friends and family.

► **Activities were much more a key to visits for staying visitors**

For instance, almost one in five (19%) staying visitors said that activities were their main reason to visit. This compares with just 6% amongst day visitors.

Trip characteristics

Nights spent in the Brecon area

Staying visitors were asked how many nights they were staying away from home and how many of these nights that they were spending in the Brecon area. The table below provides the details.

Table 11. *Nights staying away from home*

	1- 3 nights	4 – 7 nights	8-14 nights	15+ nights
All overnight stays in the Brecon area	58%	55%	38%	75%
Some overnight stays in the Brecon area	8%	18%	15%	25%
None of their overnight stays in the Brecon area	33%	27%	46%	0%
Sample Size	12	22	13	4

Note: Rounding percentages means that totals may not add up to 100%

- ▶ **Visitors in our sample were mainly a mixture of those spending all their overnight stays in the Brecon area or none of them**

This amounted to a high of 91% of short break-takers and a low of 75% of those on holidays of 15+ nights. There were a few people who could be presumed to be on touring –type holidays that included some stays in the Brecon area. This constituted 8% of short break takers, 18% of those on 4- 7 night holidays, 15% on 8 -14 night holidays and 25% on holidays of 15+ nights

- ▶ **The majority of short break takers were spending all their nights in the Brecon area**

The table above shows that 58% of those on short breaks of between 1- 3 nights fell into this category. Interestingly, those staying away from home for more than 15 nights were the most likely to be spending all their overnight stays in the local area (75%). Those staying away for between 8 and 14 nights were the least likely to be having all their overnight stays in the area (38%).

Frequency of visit

Table 12. *Frequency of visit*

How often do visitors come?	All respondents	Day visitors	Staying visitors
This is my first visit	36%	14%	51%
Once a year, or less	30%	22%	34%
2-4 times a year	15%	25%	8%
More than 4 times a year	19%	38%	8%

Note: Rounding percentages means that totals may not add up to 100%

▶ **Two thirds of visitors to Upper Swansea Valley were first-timers or infrequent visitors**

First time visitors accounted for 36% of our respondents with a further 30% saying they had visited one a year or less often. Those with less direct experience of the area were much more likely to be staying visitors than on day trips. For instance, 85% of staying visitors fell into the two categories outlined above, compared with 36% amongst day visitors.

▶ **Day visitors were much more likely than staying visitors to be frequent visitors**

Amongst our sample, day visitors were over five times more likely to have visited more than four times a year (38% compared with 8% for staying visitors).

▶ **Visitors were pretty evenly spread amongst those with high levels of knowledge of the area and those with low knowledge levels**

Table 13. *Level of knowledge of Upper Swansea Valley prior to visit*

Knowledge	All respondents	Day visitors	Staying visitors
Knew most things	14%	30%	2%
Quite a lot	29%	30%	28%
A little	22%	21%	26%
Not very much	25%	15%	30%
Nothing at all	10%	3%	13%

Note: Rounding percentages means that totals may not add up to 100%

Around four in ten (43%) visitors knew most things or quite a lot prior to their visit. However, more than three in ten (35%) said that they knew a little or nothing at all. Those on day trips were more likely to be knowledgeable about the area, with, for example, 30% of day-trippers saying that they knew most things, compared with 2% of staying visitors.

Duration of visit

Respondents were asked to say how long they intended to stay in the Upper Swansea Valley that day. The table below presents the results.

Table 14. *Length of stay in Upper Swansea Valley*

Length of stay (hrs)	All respondents	Day visitors	Staying visitors
1 hour	1%	0%	3%
2 hours	11%	21%	3%
3 hours	13%	18%	10%
4 hours	13%	12%	13%
5 hours	20%	27%	13%
6 hours	14%	15%	15%
Over 6 hours	27%	6%	44%

Note: rounding up/down means that percentages do not add up to 100%

► **Most visitors planned a reasonably lengthy stay in the area**

Only 12% of the sample was staying for 2 hours or less. In contrast, 41% stayed (or planned to stay) for six hours or more.

► **Not surprisingly, day-trip visits were shorter than those of staying visitors**

51% of the day visitors in our sample stated that they had (or were intending to stay) in the area that day for 4 hours or less. This compared with 29% of staying visitors.

Information sources

The questionnaire looked at the information sources consulted by visitors both prior to, and during, their visit.

Prior to visit

Table 15. *Information sources used by visitors prior to arrival*

Information sources	All respondents	Day visitors	Staying visitors
Internet	36%	20%	47%
Mid Wales and the Brecon Beacons brochure	21%	11%	28%
TIC	18%	11%	23%
Other leaflet / brochure	15%	17%	13%
Brecon Beacons National Park Guide	11%	9%	13%
Advice from friends and relatives	10%	14%	9%
Guidebook	9%	0%	15%
None obtained	9%	11%	6%
Info at hotel / attraction	5%	3%	6%
TV programme	2%	0%	4%
Sleeping Giant Foundation Website	1%	0%	2%
Adverts in newspapers/magazines	1%	0%	2%
Articles in newspapers / magazines	1%	3%	0%
Visit to holiday exhibition	0%	0%	0%
Other	0%	0%	0%

Note: Percentages exceed 100% due to multiple answers. In interpreting these results it should be borne in mind that the nature of the locations from which questionnaires were distributed may have skewed the results.

► **Nearly all visitors accessed some form of information prior to visit**

More than nine out of ten visitors used some form of information prior to visit.

Only 11% of day visitors had not used an information source whilst the equivalent figure for staying visitors was just 6%.

► **The internet was the most widely used source of information for both day visitors and staying visitors**

Overall, 36% of respondents said they had consulted the internet prior to their visit. Staying visitors were much more likely than day visitors to use this method of gleaning information (47% compared with 20% for day visitors).

► **Despite the high usage of the internet, printed guides were also important sources of information for visitors**

Usage levels for specific pieces of print were high. For instance, the Mid Wales and Brecon Beacons brochure was used by over a fifth (21%) of all visitors (and 28% amongst staying visitors). The Brecon Beacon National Park guide was used by more one in ten visitors (11%) with other leaflets and brochures mentioned as an information source by 15% of our sample.

During visit

Table 16. *Information sources used by visitors during visit*

Information sources	All respondents	Day visitors	Staying visitors
TIC	32%	17%	43%
Other leaflet / brochure	25%	11%	36%
Brecon Beacons National Park Guide	15%	6%	23%
Mid Wales and the Brecon Beacons brochure	14%	9%	17%
None obtained	11%	17%	6%
Info at hotel / attraction	10%	0%	17%
Advice from friends and relatives	9%	9%	11%
Adverts in newspapers/magazines	7%	3%	9%
Guidebook	7%	0%	11%
Articles in newspapers / magazines	5%	6%	4%
Internet	2%	0%	4%
Sleeping Giant Foundation Website	0%	0%	0%
TV programme	0%	0%	0%
Visit to holiday exhibition	0%	0%	0%
Other	6%	9%	4%

Note: Percentages exceed 100% due to multiple answers

► **Information sources consulted during visits showed a considerably different pattern to the range used prior to visit**

The table above shows the importance of TICs in providing information during visits. The TIC came out as the single most used information source overall (32%) with almost half (43%) of staying visitors using it at some point during their visit.

► **Brochures were an important reference source during visits**

Many of the brochures that recorded high use prior to visit were also regularly used during visits. For instance, the Brecon Beacons National Park Guide was

used by 15% of respondents and 23% of staying visitors whilst the Mid Wales and the Brecon Beacons brochure was used by 14% of the sample. One quarter of visitors (25%) indicated that they used another brochure or leaflet, a figure which rose to 36% in the case of staying visitors.

Satisfaction

Respondents to the survey were asked to rate satisfaction with their visit according to five categories, ranging from excellent to very poor. Overall quality of visit to the Upper Swansea Valley was very high with the majority (56%) of visitors describing the overall quality of visit as excellent. Percentages were similar across both day and staying visitors. No visitors rated their visit as poor or very poor.

Table 17. *Rating of overall quality of visit*

Overall rating	All respondents	Day visitors	Staying visitors
Excellent	56%	52%	58%
Good	37%	36%	38%
Average	7%	12%	4%
Poor	0%	0%	0%
Very poor	0%	0%	0%
Don't know / N.A	0%	0%	0%
Total	100%	100%	100%

In addition to the overall rating, respondents were asked to rate 17 elements of the visitor experience. The same five category rating system was used, ranging from excellent to very poor. The table below summarises the results and compares these ratings with the average ratings given for four towns included in the 2005 Brecon Beacons National Park Authority Growth Area visitor survey research (Crickhowell, Talgarth, Brecon and Llandrindod Wells).

Table 18. Ratings of facilities, services and customer service(all respondents)

Rating of services	% excellent / good	Average from towns in 2005 surveys	Above or below average?
Scenery / countryside	97%	92%	Above
Friendliness of local people	93%	71%	Above
General Atmosphere	90%	78%	Above
Quality of your accommodation*	90%	51%	Above
Value for money *	90%	66%	Above
Feeling of welcome	86%	73%	Above
Standard of signposting (road)	83%	59%	Above
Cleanliness of streets	79%	69%	Above
Range of visitor attractions / places to visit	78%	61%	Above
Standard of signposting (pedestrian)	76%	49%	Above
Availability of parking	74%	47%	Above
Quality of information available about the area	69%	59%	Above
Amount of info available about the area	68%	61%	Above
Cleanliness of public toilets	67%	38%	Above
Availability of public toilets	64%	43%	Above
Range of eating places available	62%	41%	Above
Range of shops	42%	35%	Above

* The 2005 survey wording for these items were slightly different (i.e. 'Quality of Accommodation', as opposed to 'Quality of your accommodation'; 'Value for Money' as opposed to 'Value for money in destination') so caution needs to be exercised when making direct comparisons

► **The area received very high satisfaction ratings in nearly all cases**

The table above shows that the area achieved high satisfaction ratings across nearly every measurement of visit quality. For ten of the seventeen measures assessed, the area received the excellent/good ratings from more than three quarters of visitors. Indeed, only in the case of range of shops, did less than half of visitors provide excellent or good ratings.

► **The area's scenery / countryside received highest ratings**

An impressive 97% of visitors rated *Scenery / countryside* as being either excellent or good, making it the top performing factor. Not far behind was *Friendliness of the Local People* (93%), *General Atmosphere* (90%), *Quality of your Accommodation* (90%) and *Value for Money in the destination* (90%).

► **Infrastructure and amenities scored less well**

The availability and cleanliness of toilets were two areas where visitor satisfactions dipped (64% and 67% respectively). Also scoring less well than other aspects was the range of shops and eating places (42% and 62% respectively).

► **The Upper Swansea Valley compared very favourably with other destinations surveyed**

When looked at in comparison with the destinations surveyed in 2005, we can see that the area had ratings above the average in all 17 categories. The areas where Upper Swansea Valley most outperformed the other four destinations were *Quality of your Accommodation* (+39%), *Cleanliness of Public Toilets* (+29%), *Availability of Parking* (+28%), *Standard of Pedestrian Signposting* (+27%).

The table below looks at the ratings of those on day trips and staying holidays.

Table 19. *Ratings of facilities, services and customer service(day visitors and staying visitors)*

Rating of services	% excellent / good	
	Day visitors	Staying visitors
Scenery / countryside	97%	98%
Friendliness of local people	92%	94%
Standard of signposting (road)	90%	78%
Quality of your accommodation*	86%	91%
Cleanliness of streets	84%	77%
Standard of signposting (pedestrian)	84%	71%
General Atmosphere	83%	94%
Range of visitor attractions / places to visit	81%	78%
Feeling of welcome	79%	90%
Cleanliness of public toilets	76%	63%
Value for money in destination *	71%	84%
Amount of info available about the area	70%	68%
Availability of parking	68%	77%
Quality of information available about the area	70%	71%
Availability of public toilets	69%	63%
Range of eating places available	50%	66%
Range of shops	46%	40%

* The 2005 survey wording for these items were slightly different (i.e. 'Quality of Accommodation', as opposed to 'Quality of your accommodation'; 'Value for Money' as opposed to 'Value for money in destination') so caution needs to be exercised when making direct comparisons

► **Ratings made by day and staying visitors were very similar**

In most regards there was little variance between the ratings given by those of day trips and those on staying visits. However, staying visitors were more critical of road signage than day visitors (78% rated it excellent or good, compared with 90% for day-trippers). Staying visitors were also more likely than day visitors to consider some elements of the destination to be dirtier (e.g. cleanliness of streets and cleanliness of public toilets).

► **Visitors' experience of the Upper Swansea Valley appeared to exceed expectations for the majority.**

The table below shows that for the majority, their visit to Upper Swansea Valley exceeded their expectations.

Table 20. *How did your visit to Upper Swansea Valley compare with expectations?*

	All respondents	Day visitors	Staying visitors
Much better than expected	34%	26%	42%
Bit better than expected	21%	14%	26%
As expected	34%	46%	25%
A bit disappointed	3%	6%	2%
Very disappointed	1%	0%	2%
Didn't know what to expect	5%	6%	4%
Don't know / NA	1%	0%	0%

Note: Rounding of percentages means that totals may not add up to 100%

Visits were *Much Better than Expected* for 34% of the sample and a *Bit Better than Expected* for a further 21%. Only 4% stated that their visited had caused them some level of disappointment.

► **Staying visitors were more likely to have had their expectations exceeded**

Two thirds (66%) of staying visitors rated their visit as either *Much better than expected* or a *Bit better than Expected*. This was higher than the 40% of day visitors who offered the same rating. It is impossible to say from the survey whether the high rating amongst staying visitors is down to lower expectations, lower levels of prior knowledge, a combination of both factors, or none of these.

Likelihood of recommendation

Respondents were asked whether they would recommend a visit to the area. The table below shows the results.

Table 21. *Recommend a visit?*

Recommend?	All respondents	Day visitors	Staying visitors
Yes	96%	94%	98%
Possibly	3%	3%	2%
No	1%	3%	0%

We can see that recommendation rates are very high with 96% of all visitors, rising to 98% of staying visitors, saying that they would recommend a visit.

Visitor interests

Visitors were asked to indicate whether they had taken part, or intended to take part, in a number of pastimes. The tables below present the results.

Table 22. Participation in pastimes

	All respondents	Day visitors	Staying visitors
Visit attractions	64%	54%	74%
Sightseeing	56%	43%	68%
Go to pub/restaurant	45%	26%	60%
Shopping	25%	9%	36%
Attend a festival / cultural event/ agricultural	9%	11%	8%
None	8%	14%	2%
Going to the theatre	3%	3%	4%
Going to Cinema	1%	3%	0%
Attend a sporting event as a spectator	1%	0%	2%
Other	0%	0%	0%

Note: Multiple answers were allowed so percentages may exceed 100%

► **Visiting attractions was the most common pastime**

Overall, almost two thirds of visitors had visited (or intended to visit) an attraction during their visit. Staying visitors were more likely than day visitors to have it as part of their itineraries (74% compared with 54%). General sightseeing received the second highest ranking, cited by 56% of visitors.

► **Eating and drinking were also important past-times**

Going to pubs/restaurants was undertaken by just under half (45%) of the sample. It was much more likely to be part of the visit for staying visitors than day visitors (60% compared with 26% respectively).

► **Trips to the cinema and events were proportionately more of a draw for day visitors**

These were the only two factors where the percentage of day visitors engaging in a particular pastime was higher than it was for staying visitors. For instance, 11% of day visitors had attended (or intended to attend) a festival or event, compared with 8% of staying visitors. Similarly, the cinema had been (or was to be) visited by 3% of day visitors, compared with no staying visitors.

In addition to these general activities detailed above, respondents were also asked to indicate their involvement in a number of specific indoor and outdoor activities. Table 23 provides the detail.

Table 23. Participation in activities

	All respondents	Day visitors	Staying visitors
Walking	64%	60%	66%
Cycling	9%	9%	9%
Riding / pony trekking	9%	14%	8%
Creative Arts	9%	3%	13%
Swimming	8%	0%	13%
Fishing	6%	0%	9%
Water sports	2%	3%	2%
Gliding	2%	3%	2%
Motor Sports	1%	0%	2%
Golf	1%	0%	2%
Hang Gliding	1%	3%	0%
Tennis	0%	0%	0%
Mountain boarding	0%	0%	0%
Rally School	0%	0%	0%
Other	0%	0%	0%

Note: Multiple answers were allowed so percentages may exceed 100%

► **Walking was, by far, the most popular activity**

Almost two thirds (64%) of visitors said that they had included (or intended to include) a walk as part of their visit. Reported levels were pretty similar across both day and staying visitors (60% and 66% respectively).

► **Other activities were undertaken by less than one in ten visitors**

Aside from walking, activities represented a relatively minority interest. A range of activities was engaged in, including cycling, horse-riding, creative arts, swimming and fishing. More active activities such as horse riding were more likely to be done by day visitors (14% compared with 8% for staying visitors) whilst the more passive pursuits of fishing and creative arts were more commonly pursued by staying visitors (fishing was done by 9% of staying visitors compared with none of the day visitors. Similarly creative arts were done by 13% of staying visitors and only 3% of day visitors).

APPENDIX 1 – ANSWERS TO OPEN-ENDED QUESTIONS

Below are listed answers to the two open questions that were included on the questionnaire. To aid analysis, answers have been grouped under a number of broad subject headings. Where more than one person gave the same answer, the number of people giving this answer has been included in brackets.

Please note: Comments have been included as they were written by respondents. Some include spelling errors and grammatical faults.

IF YOUR VISIT WAS BETTER OR WORSE THAN EXPECTED CAN YOU TELL US THE REASONS?

Visitor attractions

- As adults we thought the show caves overpriced as we were not interested in the other attractions there. Would have paid £6.50 for caves only. Craig-y-Nos country park - the staff were excellent and welcoming. A very enjoyable couple of hours spent there.
- Our visit is to the Craig-y-Nos Park. We drive around the general area and enjoy the scenery. C-y-N Park is unique. I love it.
- Do not expect Craig-y-Nos to be quite so visitor friendly and so beautiful
- Scenery and attractions were much better than we expected
- We were made very welcome by the attitude of local people, members of staff at Dam-y-olaf caves were warm and friendly. The cathedral cave was out of this world, beyond our belief. We were overwhelmed.
- One attraction was not up to expectation as the shire horses were in their stables and not working when staff were asked the reply was they were kept in their stables during open time to the public.
- Caves were as fab as I had remembered
- Caves were better than expected. Marvellous day out 10/10
- Main reason was to visit Craig-y-Nos it was bigger and roomier than expected. Lots of people in the car park but plenty of room for us all.
- Been to attractions before but found that there were new things and activities to attend plus a really good band.
- We visited Dan-yr-Ogof - it has changed and improved greatly since I last visited (20 yrs ago)
- Dan-yr-ogof caves excellent value for money. Our third visit and better than ever
- Impressed with work put into caves

- I found the caves to be more spectacular than expected
- Too much hype, visit spoiled by over loud music and commentary, expensive and poor value for money. A wonderful site in beautiful surroundings spoilt by poor tea room too!
- Llangorse lake was a bitter disappointment. I would say it had more going for it on my last visit, which was 30 years ago. Hence my visit to Dan-yr-ogof, which was brilliant.
- We specifically went to the caves, but arrived after lunch at 3.15pm to find they were shut for the day. It would be great if they opened later and if I could buy a ticket for the caves. The £10 per adult would have been expensive for us with no children and no wish to visit the other attractions
- It was ok - walk around gardens could be made more interesting
- We expected that there would be very little to do close by and would need to drive a long way. However, we found lots of lovely places within 10 mins drive.
- I used to live here so knew what was available. The children chose Dan yr Ogof for dinosaurs, animals, playbarn. They don't like caves. I think the cost is too high. Father + 2 children (under 12) £23 + lunch £14 + ice cream £4.50 + souvenir £5. £46.50!
- Madam Patti's Park is my favourite place. We have been so many times and it holds so many memories. What a joy to visit, so beautiful in all seasons of the year. WELL DONE!
- Our visit is to the Craig-y-Nos Park. We drive around the general area and enjoy the scenery. C-y-N Park is unique. I love it.
- Then we went to Pen Pont to an art exhibition where for £2.50 we wandered the grounds (in the rain) and had tea and welsh cakes in the really interesting house and heard presentations from artists about their work. It was a very strange thing to happen upon, but very enjoyable.

Accommodation

- The accommodation made the difference

Information / welcome

- The info and general service have improved a good deal since our first visit 18 years ago. A lot of effort has been put into improvement
- Better than I thought due to the excellent information given by the lady who works in the shop (Elen Jones)

General comments

- Enjoyed every minute
- I lived here prior to 1958. I returned briefly in 1974. At that time accommodation and tourism was almost nil. We could not even find a hotel which would accommodate us or provide a meal in Ystradgunlais or Ystalyfera. However, things have changed remarkably with both the facility to eat and be accommodated most excellent. The valley is more beautiful than ever with many slag heaps reclaimed and yet the character of the area by and large is retained. I will return again!
- Parking facilities good, clean toilets available, beautiful scenery
- We've come to Wales every 4/5 years since 1976 and love it every time (it is a pity that the pound sterling is so expensive compared to our Euro - that used to be different 30 years ago)
- The number of visitor attractions was excellent; scenery is beautiful, friendly natives, attractive accent!
- Rain! July 2007
- Could not fault anything
- Usual good
- Great scenery, hospitality and road systems
- A lovely place to visit. We will be coming back!
- We knew it would be a great day out, but we enjoyed experience even more.
- Not much to do for young children
- Visiting USV for 4 years - regularly. We know what it is like and where we can find it. Open countryside and paths to walk.

Quality / attractiveness of the natural environment

- I did not realise quite how scenic the area is
- Scenery much more impressive than expected
- Views more extensive than expected people were exceptionally friendly
- Beautiful scenery - beyond expectations. Good comfortable, safe family environment. I enjoy the cool climate - the rain etc. It makes it more comfortable. The greenery and quietness of roads.

IF WE COULD IMPROVE JUST ONE THING ABOUT THE UPPER SWANSEA VALLEY WHAT SHOULD THAT BE?

Visitor attractions

- The national showcaves centre for Wales
- Reliability of lighting in National showcaves
- Bigger gift shop at caves. Too narrow.
- Make some updates to the showcaves. Improve the entrance to the bone cave, make it higher so you don't have to wear a helmet.
- Events or activities for younger children ie. park or wooded trails etc in Craig-y-nos.
- Bigger play areas for children
- More "open" farm activity centres for children, ie. where children can go and feed animals, go on rides etc. Provide educational information etc.
- More children's activities

Visitor amenities

- More toilets, better signposts
- More information for adults not just always aimed at kids
- Toilet facilities
- One or two more toilets please.
- Provision of dog waste bins in Craig-y-Nos to dispose of waste bags
- The only comment we have is that there aren't enough 'dog poo' bins or signs to advise where to put in Country Park. Also no litter bins. No bin in ladies loo either. LOVED it otherwise!

Roads and transport

- Totally revamp the dangerous and difficult main entry traffic roundabout approaching Swansea from the north.
- More sign posts!
- Car park charges at country parks too high
- The quality of traffic signing on smaller roads
- Some side roads, village roads need improvement. Sign posts on side roads need a lot more attention.
- Parking and food.
- Sign posts can be misleading on most major roads in and around major towns and cities
- Better signposting for the 8 Afon/Mellte/Neath waterfalls walks
- Normal road signs for visitors throughout Wales need radical overhaul!
- Less road works please

- Some of the road surfaces
- Transport to town area (bus) and more information on its availability also more places to eat ie pubs, restaurants

Range and quality of shops and eating places

- More places to have cups of tea
- Better pubs and a few more shops, plus a proper tourist information office
- Locality of restaurants
- Maybe some extra places to sit outside and have coffee or a drink (like many continental cafes and restaurants have a so-called terrace with easy chairs - not picnic tables/chairs)
- More restaurants advertised to eat out
- Café at Craig-y-Nos Country Park. The one at the Coach House used to be great!
- More accessible picnic areas

Information

- More info on fishing course and game tackle shops
- Free map of Craig-y-Nos Country Park

Other

- Leave it alone it is lovely!
- Nothing - leave it as it is - roads are good for access
- Nothing - it is fine as it is!
- Nothing
- For the sun to shine all the time
- It is already a paradise! You can't improve on that!
- None
- The weather!
- Nothing, we have really enjoyed our visit so far. We will have to come back as we cannot fit everything in this time.
- Rain (sorry)
- Stop the rain
- Can't think of anything to improve one.
- Nothing

- Not to have so many tourists. Grew up hiking etc. up there - feel tourism spoils it.
- Cant think of anything
- Why gild the lily - or even seek to?