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TALGARTH VISITOR SURVEY 2008

Results
(Dec 2008)

Survey supported by

COLLABOR8

BRECON BEACONS NATIONAL PARK

Partneriaeth Twristiaeth CANOLBARTH CYMRU
Tourism Partnership MID WALES

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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 Talgarth and District Regeneration group, Talgarth Trust, Talgarth Town Council and also with the assistance of Tourism Partnership Mid Wales. The project has also received European Regional Development funding through INTERREG IV 8.

The research aimed to investigate the characteristics of visits and visitors to the Talgarth area. The findings of a previous survey conducted in 2005 were published in a separate report. Separate reports are also available for two similar surveys carried out in Crickhowell and Brecon in 2005 and in 2008.

Objectives

The objectives for the survey were threefold:

- To gain insights into the characteristics of current visitors to Talgarth.
- To examine the characteristics of different types of visitors.
- To inform future tourism planning for Talgarth as part of wider promotion of the Brecon Beacons National Park Authority Tourism Growth Area.

Methodology

The research took the form of a survey. Responses to the survey were gained in two ways:

- **Self-completion questionnaires**: Between the beginning of March and end of October 2008, several hundred self-completion questionnaires were distributed by volunteers and BBNPA staff to a number of locations around Talgarth. Visitors could choose either to complete the questionnaire there and then, handing it back to an appropriate member of staff, or to use a freepost envelope to post it back.
- **Face-to-face interviewing:** In order to supplement responses gathered via the self-completion forms, fieldworkers from market research company Interviewing Services Limited (ISL) used the questionnaire to interview a sample of visitors face-to-face. The interviews were conducted across 2 days during August 2008.

A total of 93 questionnaires were returned using the methods listed above.

RESULTS

This section presents the main findings of the 2008 research[1]. Figures from the 2005 survey have been included within brackets in many of the tables Commentaries also make reference to 2005 figures where relevant.

One of the objectives for this study was to examine the characteristics and views of the different types of visitors. Specific segments that were investigated included:

- **Day trippers from home** – those travelling from and back to home in the same day for leisure purposes.
- **Holiday day trippers**– those taking a day trip to Talgarth whilst on holiday elsewhere in the area.
- **Short break takers** – those staying 3 nights or less in Talgarth.
- **Longer break takers** – those staying 4 nights or more in Talgarth.

Holiday-takers of one sort or another made up almost three quarters (70%) of the sample. 34% of respondents were on a short break, with 20% on longer breaks. Holiday day trippers accounted for 16% of the sample.

Day trippers travelling from home accounted for 27% of respondents. The remainder of the sample (3%) were on other types of trips such as business.

In the main body of the report we focus on presenting the overall results from the total sample of 93 respondents. Due to the small sample sizes achieved for the individual categories of trip takers listed above and the consequent dangers of placing too much emphasis on the reliability of these results, they are included as Appendix 1.

Characteristics of visitors

- **More females than males responded to the survey**
  - Approaching 6 in 10 respondents (56%) of the sample were female with the remaining 44% being male.

- **There was a good overall spread of ages amongst respondents but there was a skew towards older visitors**
  - For instance, approaching two thirds of respondents (60%) were aged 45 years or over. This was a very similar age profile to that observed in the 2005 survey where 59% fell into this age range. The table below provides more detail

[1] The results of two open-ended questions included in the questionnaire are given in Appendix 2.

Table 1 Age profile of respondents

Age	% of all respondents (2005 figs in brackets)
16-24	4% (6%)
25-34	15% (6%)
35-44	18% (20%)
45-54	20% (35%)
55-64	22% (14%)
65+	18% (10%)
No answer	2% (8%)
Total	99% (99%)

Note: Percentages are rounded to the nearest whole number so totals may not add up to 100%. Sample size =93.

Transport used

Table 2 Main mode of transport used by respondents to reach Talgarth

Transport mode	% of all respondents (2005 figs in brackets)
Car/van	91% (86%)
Regular bus/coach	0% (0%)
Bus/coach excursion	0% (2%)
Motorcycle	0% (0%)
Bicycle	3% (4%)
Walk	2% (8%)
Train	2% (0%)
Other	1% (0%)
No answer	0% (0%)
Total	99% (100%)

Note: Percentages are rounded to the nearest whole number so totals may not add up to 100%. Sample size =90.

- **Cars or vans were used by over nine out of ten respondents**
  - 91% of respondents used a car/van to reach Talgarth, slightly higher than that found in the 2005 survey (86%).
  - The numbers walking reduced somewhat (down to 2% from 8% in the 2005 survey) but use of other forms of transport remained at levels close to those observed in the 2005 survey.

Group composition

This section looks at the characteristics of the groups in which the respondents visited. It looks first at the overall size of group and then at the presence or otherwise of children within the groups.

Table 3 Total group size

Group size	% of all respondents (2005 figs in brackets)
1	20% (14%)
2	34% (41%)
3	10% (20%)
4	17% (14%)
5	4% (6%)
6 – 10	11% (4%)
11-20	0% (0%)
21 and over	0% (0%)
Don't know / no answer	2% (0%)
Total	98% (99%)
Average (mean)	(2.86) (3.05)

Note: Percentages are rounded to the nearest whole number so totals may not add up to 100%. Sample size =93

- **Just over one third of respondents visited in groups consisting of two people**
  - 34% fell into this category with the next most common group size being 1 person (20% of respondents). Overall, the average group size was 2.86, slightly smaller than the 3.05 average recorded in the 2005 survey.

- **Over 1 in 10 respondents came in larger groups**
  - 11% travelled to Talgarth in a group of 6 or more people. This was considerably higher than the 4% who fell into this group in the 2005 survey.

Presence and age profile of children

Table 4 Presence of children within groups visiting Talgarth

	% of all respondents (2005 figs in brackets)
With children	31% (22%)
Without children	69% (78%)
Total	100% (100%)

Sample size=93

Table 5 Age profile of children within groups visiting Talgarth

Age profile of children	% of respondents with children
0-5 year olds	31%
6-10 years	38%
11-15 years	62%

Note: Percentages for the age profile of children totals more than 100%. This is because a respondent can have children in more than one age category. Sample size =93

- **The vast majority of respondents to the survey were visiting in groups that did not include children**
  - Over two thirds (69%) of the sample fell into this category, 9% less than the 78% who were in childless groups in the 2005 survey.

- **Those with children were likely to have older, rather than younger children, with them**
  - Of the quarter of respondents that did have children with them, approaching two thirds (62%) had children aged between 11– 15 years old, 38% were accompanied by children aged 6 – 10 years old, whilst 31% had 0 – 15 year olds with them.

Accommodation & booking method

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

Table 6 Main accommodation used during visit (all staying visitors)

Type of accommodation	% all staying visitors (2005 figs in brackets)
Rented Self Catering/Serviced Apartment	20% (16%)
Guest House/B&B/Farm	18% (35%)
Camping	18% (8%)
Touring/motorised caravan	16% (14%)
Home of friends and relatives	14% (16%)
Hotel/motel/ inn/lodge	8% (0%)
Caravan – static, owned	6% (0%)
Bunkhouse	2% (3%)
Caravan – static, rented	0% (0%)
Hostel	0% (5%)
Boat	0% (0%)
Don't know / NA	0% (3%)
Total	102% (100%)

Sample size = 50. Percentages are rounded to the nearest whole number so totals may not add up to 100%.

- **Most respondents were staying in non- serviced accommodation**
  - Over 8 in 10 respondents (82%) were staying in non-serviced accommodation. Rented self-catering was the most popular choice (20%) with camping the next most likely non-serviced choice (18%). Significant proportions were also staying in touring or motorised caravans (16%) and the homes of friends and relatives (14%).
  - The only form of serviced accommodation used by respondents was guest houses/B&Bs (used by 18% of staying respondents).

Table 7 Booking method for accommodation (all staying visitors)

Booking method	% all staying visitors (2005 figs in brackets)
Directly with accommodation establishment	40% (49%)
Didn't book in advance	21% (16%)
Internet	15% (11%)
Tourist Information Centre	9% (14%)
Through Travel Agency/Tour Operator	6% (5%)
Through Central Reservation services	6% (3%)
Other	2% (0%)
Don't know/No answer	0% (5%)
Total	99% (103%)

Sample size = 47. Percentages are rounded to the nearest whole number so totals may not add up to 100%.

- **Almost four fifths of respondents booked their accommodation in advance, with direct booking with the accommodation establishment the most popular method**
  - 79% of staying visitor respondents booked in advance. Booking direct via accommodation providers accounted for the lion's share of advance bookings (40% of the sample used this method).
- **Internet booking was used by over 1 in 6 respondents (15%)**
  - This figure was 4% higher than was the seen in the 2005 survey
- **Other booking methods were much less commonly used**
  - The Tourist Information Centre accounted for just under 1 in 10 bookings (9%) with travel agents/tour operators and central reservation services each picking up 6% of respondents bookings.
- **Advance booking appears to have become slightly less common amongst our respondents**
  - In the 2005 survey, 16% of respondents did not book in advance. In the 2008 survey, this figure rose to 21%.

Reason for visit

Respondents were asked to indicate from a list which was the main reason for their visit. They were also asked to indicate all those reasons that influenced their visit. The table below provides the results.

Table 8 Reasons for visit (all respondents)

Reasons	All respondents (2005 figs in brackets)	
	Influenced*	Main reason**
Scenery/landscape/countryside	22% (33%)	15% (24%)
Easy to get to	12% (0%)	2% (0%)
Peace and quiet	11% (14%)	2% (6%)
Activities	10% (14%)	13% (22%)
Previous visit	9% (8%)	11% (8%)
Event / festival	9% (20%)	35% (16%)
Buying local arts and crafts	7% (0%)	2% (0%)
Shopping	6% (0%)	3% (2%)
Historic interest	6% (12%)	2% (0%)
Just passing through	6% (6%)	10% (6%)
Buying local produce	4% (2%)	1% (0%)
Recommendation	3% (4%)	1% (4%)
Visiting friends & relatives	3% (2%)	11% (4%)
To attend a sporting event	1% (0%)	0% (0%)
To visit a visitor attraction	0% (2%)	10% (2%)
Other	0% (16%)	7% (2%)
Don't know / none	1% (20%)	1% (0%)

*Note: *Percentages exceed 100% due to multiple answers. ** Percentages are rounded to the nearest whole number so totals may not add up to 100%.*

- **A wide variety of factors influenced the decision to visit but scenery and landscape was the single most important one**
  - Scenery was an influence for just under one quarter of visitors (22%). Next most popular amongst the influences was the fact that Talgarth was easy to get to, a factor for 12% of respondents. Peace and quiet (11%) and the chance to undertake activities (10%) were next most likely to be influences.

- **Events and festivals were the most common main reason for a visit**
  - Over one third of respondents (35%) cited events/festivals as the main reason for their visit. This was over twice the proportion that was seen in the 2005 survey but it may be that a disproportionate amount of questionnaires were picked up by people attending events.

- **The scenery and the chance to undertake activities lay behind a considerable number of visits**
  - Over 1 in 6 respondents (15%) stated that the scenery and countryside of the area was the main reason for their visit, whilst just under this amount put the chance to undertake activities (13%) as the reason.

- **There have been some changes in the main reasons that lie behind visits to Talgarth**
  - The most notable change was in the numbers coming because of events. As has already been mentioned, in 2005 16% gave events/festivals as their main reason for visit, whilst in 2008 that had jumped to 35%. Visitor attractions also increased their influence on visits, in 2008 the main reason for 1 in 10 respondents, compared with 1 in 20 in the previous survey.
  - Not all the factors listed as main reasons for visit have seen an increase. For instance, the numbers coming mainly because of the scenery dropped from 24% to 15% whilst activities as the main reason for visit dropped from 22% to 13%.

Origin of visitors

Table 9 Origin of visitors

Where are you from?	All respondents (2005 figs in brackets)
Wales	37% (18%)
London & SE England	18% (18%)
SW England	12% (16%)
Midlands	7% (16%)
NW England	5% (6%)
East of England	2% (14%)
Yorks and Humberside	1% (0%)
Scotland	1% (2%)
North East	0% (0%)
Overseas	0% (6%)
Ireland	0% (0%)
Don't know / no answer	15% (2%)
Total	98% (98%)

Sample size = 105.

- **The majority of visitors were from outside of Wales**
  - Although the indigenous Welsh market remained the largest single source of visitors (37%), the majority of visitors were from elsewhere. The south of England accounted for 30% of visitors in the survey, with 7% coming from the Midlands.
  - The proportion of Welsh visitors has more than doubled, up from 18% in 2005 to 37% in the latest survey.

Frequency of visit

Table 10 Frequency of visit

How often do visitors come?	All respondents (2005 figs in brackets)
This is my first visit	59% (61%)
Once a year, or less	21% (20%)
2-4 times a year	7% (6%)
More than 4 times a year	13% (12%)
Don't Know/NA	0% (0%%)
Total	100% (99%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

- **The vast majority of respondents to Talgarth were new or infrequent visitors**
  - Almost six out of 10 respondents (59%) were visiting for the first time, with a further fifth (21%) visiting once a year or less often.
  - The proportion of new and infrequent visitors to Talgarth has remained remarkably stable since the last survey in 2005. For instance, the percentage of first time visitors has reduced by only a couple of percentage points (59% fro 61%), whilst those visiting once a year or less often has risen by 1% to 21%.

- **Regular visitors made up around one firth of respondents**
  - Looking at those who said that had been to Talgarth two or more times, we can see that 20% of respondents fell into this category in the 2008 survey. This was similar to the 18% seen in the 2005 survey.

Levels of knowledge

Table 11 Level of knowledge of Talgarth prior to visit

Level of knowledge	All respondents (2005 figs in brackets)
Knew most things	6% (8%)
Quite a lot	22% (14%)
A little	13% (20%)
Not very much	26% (16%)
Nothing at all	33% (39%)
Don't know / no answer	0% (2%)
Total	100% (99%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

- **Overall levels of knowledge of Talgarth prior to visit remain low**
  - In the 2005 survey, over half of respondents (55%) said that they knew nothing or not very much about Talgarth prior to this visit. In the 2008 survey, the proportion stating this increased a little to 59%.

- At the other end of the scale, the percentage stating that they knew most things or quite a lot has increased slightly, from the 2005 survey level of 22% to 28% in the latest survey.

Length of stay

Respondents were asked to say how long they intended to stay in Talgarth on that particular day. The table below presents the results. (It should be noted that the results include staying visitors and hence are likely to be higher than if just day visitor results were presented).

Table 12 Length of stay in Talgarth

Length of stay (hrs)	All respondents (2005 figs in brackets)
Less than 2	6% (2%)
2 to 4	41% (22%)
5 to 7	24% (10%)
8 to 10	3% (11%)
11 to 14	4% (0%)
More than 14	21% (56%)
Don't know / NA	0% (0%)
Average (mean) number of hrs*	3 hrs (3.3 hrs)

Note: In order to provide results which more accurately describe the actual length of visits, the 2005 figs have been recalculated to take account only those respondents who gave an answer (i.e. the percentages now don't include those who gave no answer). In addition the average number of hours figures for 2008 and 2005 excludes those staying more than 14 hours. It is felt that respondents who fell into this category were in fact staying visitors indicating their overall length of stay rather than the time spent in Talgarth on this particular occasion. .

- **There was a good mix of long and short visits to Talgarth amongst our sample but almost half of visits lasted 4 hours or less**
  - 47% of respondents fell into this category. 6% spent less than 2 hours in Talgarth whilst 41% spent between 2 and 4 hours in the destination.
  - The average length of time spent in the destination was 3 hours. This was slightly less than the 3.3 hours recorded as the average length of stay in the 2005 survey.

Information sources

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

Prior to visit

Table 13 Information sources used by visitors prior to arrival

Information sources	All respondents (2005 figs in brackets)
Internet	25% (35%)
None obtained	23% (4%)
Advice/Word of mouth	13% (4%)
Other holiday brochure	10% (12%)
Other info outlet	8% (16%)
Guidebook	6% (14%)
Talgarth Tourist Information Centre	4% (4%)
Adverts in newspapers/magazines	4% (6%)
Mid Wales and Brecon Beacons Brochure	3% (4%)
Brecon Beacons National Park Visitor Guide	2% (12%)
Articles in newspapers/magazines	2% (6%)
Information at hotel/attraction	2% (2%)
Visit to holiday exhibition	0% (0%)
TV programme	0% (2%)
Other	0% (0%)
Don't know / No answer	26% (20%)

Note: Percentages exceed 100% due to multiple answers. Caution: when 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.

- **The internet was the single most used source of information but almost a quarter of visitors did not use any source of advance information**
  - One quarter of respondents (25%) said that they used the internet to gain information prior to their visit. However, 23% of respondents said that they did not obtain any information in advance of their visit. This was much higher than the 4% who did not obtain prior information in the 2005 survey, although it is unclear why this should be so.
  - Even though the internet remained the single most used source of information, the numbers using it to obtain prior information on Talgarth had dropped (down by 10% to 25% in 2008 from 35% in 2005).
- **Use of printed information prior to visit appears to have reduced over time**
  - For instance, the National Park Visitor guide was used by 2% of respondents prior to visit (as compared with 12% in the 2005 survey). Similarly, use of guidebooks dropped from 14% in 2005 to 6% usage in 2008. Aside from this, the Mid Wales and Brecon Beacon brochure, guidebook and other holiday brochure all recorded lower use in the 2008 survey than in 2005.

During visit

Turning to information sources used during a visit, the table below presents the main findings.

Table 14 Information sources used by visitors during visit

Information sources	All respondents (2005 figs in brackets)
Talgarth Tourist Information Centre	41% (65%)
None obtained	24% (0%)
Advice / Word of mouth	8% (8%)
Other Info outlet	6% (6%)
Brecon Beacons National Park Visitor Guide	5% (8%)
Guidebook	4% (10%)
Other holiday leaflet/brochure	4% (6%)
Mid Wales and Brecon Beacons Brochure	2% (10%)
Internet	1% (2%)
Information at hotel/attraction	0% (6%)
Articles in newspapers/magazines	0% (0%)
Adverts in newspapers/magazines	0% (0%)
TV programme	0% (4%)
Visit to Holiday Exhibition	0% (0%)
Other	0% (0%)
Don't know / No answer	28% (12%)

Note: Percentages exceed 100% due to multiple answers.

- **Talgarth Tourist Information Centre was the most used information source during visits**
  - Over four out of 10 respondents (41%) said that they had made use of the TIC during their visit. Although lower than the rate observed during the 2005 survey (65%), it was still a high percentage. It should be noted that use of the TIC may well have been over-represented in these results because of the fact that questionnaires were distributed at the TIC.

- **Almost a quarter of visitors did not use any source of information during their visit**
  - As was seen with information used prior to visit, a significant minority of visitors (24%) did not use any source of information during their visit. In the 2005 survey, no visitors indicated that they had not used any source of information. It is unclear why there has been such a steep increase in people not using information whilst in the destination.

- **New technology played little part in visitors' information gathering whilst they were in the destination**
  - The internet, widely used beforehand, was hardly used (1%) during a visit.

Satisfaction

Respondents to the survey were asked to rate their overall satisfaction with their visit according to five categories, ranging from excellent to very poor.

Table 15 Overall quality of visit to Talgarth

Overall rating	All respondents (2005 figs in brackets)
Excellent	30% (31%)
Good	51% (47%)
Average	15% (8%)
Poor	0% (4%)
Very poor	0% (0%)
Don't know / N.A	2% (10%)
Total	98% (100%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

- **Over 8 out of 10 visitors gave high satisfaction ratings for their visit**
  - 81% of respondents rated their visit as either excellent or good. Encouragingly, there were no negative ratings.

- **Satisfaction with visits appears to be broadly the same as it was in 2005**
  - As we have seen above, 81% of respondents in the 2008 survey rated their visit as excellent or good. This is not much different from the 88% who gave these ratings in the 2005 survey. At the other end of the scale, negative ratings dropped to 0% from the 4% seen in 2005.

In addition to the overall rating, respondents were asked to rate 17 elements of the visitor experience in Talgarth. 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 all three towns included in the 2008 research programme (Crickhowell, Talgarth, Brecon).

Table 16 Ratings of facilities, services and customer service(all respondents)

Rating of services	% excellent / good (2005 figs in brackets)	Up/ Down?	Average for all 3 towns	Above or below average?
Scenery/countryside	94% (92%)	↑	94%	Average
Friendliness of local people	81% (80%)	↑	88%	Below
Feeling of welcome	76% (82%)	↓	87%	Below
Quality of accommodation	73% (83%*)	↓	86%	Below
Cleanliness of streets	74% (63%)	↑	80%	Below
General atmosphere	70% (74%)	↓	86%	Below
Amount of info available about Talgarth	62% (72%)	↓	74%	Below
Value for money	59% (65%)	↓	71%	Below
Quality of information available about Talgarth	58% (72%)	↓	72%	Below
Availability of parking	58% (60%)	↓	62%	Below
Standard of signposting (road)	58% (55%)	↑	72%	Below
Standard of signposting (pedestrian)	57% (24%)	↑	69%	Below
Availability of public toilets	52% (45%)	↑	62%	Below
Range of visitor attractions / places to visit	47% (53%)	↓	66%	Below
Range of eating places available	33% (33%)	→	63%	Below
Cleanliness of public toilets	27% (34%)	↓	52%	Below
Range of shops	16% (18%)	↓	48%	Below

*Note: * this figure has been re-calculated to exclude the high percentage of respondents who provided no answer (29%)*

- **The scenery and countryside in and around Talgarth received the highest rating**
  - Nearly all respondents (94%) rated Talgarth's scenery as excellent or good, slightly higher than the 92% that provided these ratings in the 2005 survey.

- **The friendliness of Talgarth was rated very highly**
  - The town was seen as friendly, with good scores for both the friendliness of local people (81%) and the feeling of welcome (76%).

- **The range of shops and cleanliness of toilets received the lowest ratings**
  - The range of shops were rated as excellent or good by less than 2 in 10 respondents (16%), making it the lowest of all 17 factors rated. The cleanliness of toilets received the next lowest rating (27% rating them excellent or good). The low rating given for the cleanliness of toilets chimes with several of the comments made by respondents elsewhere on the questionnaire and which are included as part of Appendix 2.

- **Satisfaction with the majority of factors measured had dropped**
  - 10 out of the 17 factors saw a drop in the ratings score given by respondents, when compared with equivalent figures from the 2005

survey. Respondents seemed particularly less happy with the quality and amount of information available on Talgarth (62% rated the amount of information available as excellent or very good in the 2008 survey compared with 72% in the 2005 survey. Similarly, 58% rated the quality of information as excellent or very good, compared with 72% who gave the same ratings in the 2005 survey).

- **Visitor ratings for Talgarth did not compare that well when set against other towns**
  - Talgarth was one of three towns included in research during 2008 (the others were Crickhowell and Brecon). Comparing the ratings given for Talgarth with those for the three towns as a whole, Talgarth had below average ratings for 16 out of 17 factors.

Visitors' expectations of Talgarth

Table 17 How did your visit to Talgarth compare with expectations?

	All respondents **(2005 figs in brackets)**
Much better than expected	18% (18%)
Bit better than expected	10% (24%)
As expected	48% (37%)
A bit disappointed	6% (8%)
Very disappointed	2% (2%)
Didn't know what to expect	8% (6%)
Don't know / NA	6% (4%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

- **A visit to Talgarth exceeded the expectations of approaching one fifth of respondents whilst for almost all others it met expectations**
  - Just under 1 in 5 respondents (18%) rated their visit as much better than expected whilst 1 in 10 (10%) rated it as a bit better than expected. Most of the remainder (48%) rated their visit as expected.

- **Levels of disappointment were low and appeared to have reduced slightly**
  - 8% of respondents indicated that they were either a bit or very disappointed with their visit to Talgarth. This was slightly down on the 10% who expressed disappointment in the 2005 survey.

If a respondent indicated that their visit was better or worse than expected, they were additionally asked to say why this was so. The answers to this question are included in the first part of Appendix 2.

Suggestions for improvements

Respondents were asked *"If we could improve just one thing about Talgarth, what should that be?."* The answers given appear in the second half of Appendix 2.

Willingness to recommend

Respondents were asked whether or not they would be willing to recommend a visit to Talgarth. The table below provides the response.

Table 18 Would you recommend?

	All respondents (2005 figs in brackets)
Yes	74% (91%)
Possibly	22% (9%)
No	3% (0%)
No reply	1% (0%)

- **High numbers would recommend a visit, but the proportion definitely willing to do so appeared to be dropping**
  - 74% respondents said that they would be happy to recommend, a figure that was less than the 91% of respondents to the 2005 survey who said they would do so. 22% said that they would possibly recommend a visit, higher than the 8% who said this in the 2005 survey.

Visitor interests

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

Table 19 Participation in leisure activities

	All respondents (2005 figs in brackets)
Go to pub/restaurant	57% (63%)
Sightseeing	45% (59%)
Visit attractions	45% (47%)
Shopping	35% (43%)
Attend festival/cultural/agricultural event	34% (41%)
None	11% (4%)
Going to the cinema	3% (6%)
Going to the theatre/show/concert	2% (6%)
Attend sporting event as a spectator	2% (4%)
Other	3% (8%)
Don't know / NA	5% (4%)

- **As was the case in the 2005 survey, leisure activities undertaken by visitors fell into two main groups – those that were engaged in by large numbers of visitors and those that were more of a minority interest.**
  - Amongst the first group, going to pubs/restaurants emerged as the most popular leisure activity (57%) with sightseeing (45%), visiting attractions (45%), shopping (35%) and attending festivals/events (34%) also frequently cited. Aside from these five most popular leisure activities, the remaining leisure activities were each undertaken by less than one in twenty visitors.

- **The incidence of leisure activities undertaken has remained broadly similar between 2005 and 2008**
  - The top leisure activities have remained broadly the same as in 2005 but a few have seen large fluctuations in prevalence. For instance, sightseeing has decreased in popularity, from 59% in the 2005 survey to 45% in the 2008 survey.

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 20 (below) provides the detail.

Table 20 Participation in activities

	All respondents (2005 figs in brackets)
Walking	59% (78%)
Swimming	11% (0%)
Cycling	10% (10%)
Fishing	10% (12%)
Riding and pony trekking	8% (10%)
Water sports	5% (18%)
Gliding	5% (0%)
Creative arts	4% (4%)
Climbing/abseiling	1% (0%)
Golf	0% (6%)
Motor sports	0% (4%)
Tennis	0% (4%)
Bird watching	0% (0%)
Mountain boarding	0% (0%)
Other	2% (4%)
Don't know/ None/ NA	29% (16%)

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- **Walking dominated the list of outdoor activities undertaken**
  - Over half of respondents (59%) had done some walking (or planned to) during their visit. This proportion was somewhat down on the 78% who included the activity in their itineraries in the 2005 survey.

- **Four activities were undertaken by around 1 in 10 respondents**
  - Swimming was undertaken by 11% of respondents, 1% more than the 10% who said that they were engaged in cycling and fishing. Riding and pony-trekking were undertaken by 8%.
- **Gliding was undertaken by 1 in 20 visitors**
  - Given that it is very much considered a niche sport, the number of respondents who counted gliding as one of their activities was comparatively high (5%).

APPENDIX 1 – RESULTS FOR INDIVIDUAL TRIP TYPES

This appendix includes results for the four types of visitor surveyed. These are listed below, along with the sample size achieved for each type of visitor.

- Short break holiday takers (sample size = 31)
- Long stay holiday takers (sample size = 20)
- Holiday day trippers - i.e. on a day trip whilst on holiday elsewhere (sample size = 14)
- Day trippers (sample size = 25)

In addition, 3 respondents did not indicate the type of trip that they were on

The small samples sizes means that great caution should be exercised when interpreting the results for these individual groups.

Age

Table 21 Age profile of respondents

Age	% respondents			
	Long stay	Short stay	Holiday day trip	Day trip
16-24	6%	10%	0%	0%
25-34	22%	19%	0%	12%
35-44	6%	23%	36%	12%
45-54	22%	19%	36%	12%
55-64	22%	13%	14%	40%
65+	17%	13%	14%	24%
No answer	6%	3%	0%	0%
Total	101%	100%	100%	100%

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

Transport used

Table 22 Main mode of transport used by respondents to reach Talgarth

Transport mode	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Car/van	83%	84%	100%	88%
Regular bus/coach	0%	0%	0%	0%
Bus/coach excursion	0%	0%	0%	0%
Motorcycle	0%	0%	0%	0%
Bicycle	6%	6%	0%	0%
Walk	6%	0%	0%	4%
Train	6%	3%	0%	0%
Other	0%	3%	0%	0%
No answer	6%	10%	0%	8%
Total	107%	106	100%	100

Group composition

Table 23 Number in visit group

	% of respondents			
Total number in group	Long stay	Short stay	Holiday day trip	Day trip
1	39%	13%	7%	20%
2	28%	42%	21%	32%
3	6%	13%	14%	8%
4	6%	13%	43%	20%
5	6%	6%	0%	4%
6-10	17%	6%	14%	16%
11-20	0%	0%	0%	0%
21 and over	0%	0%	0%	0%
Don’t know / no answer	0%	6%	0%	0%
Total	102%	99%	99%	100%

Accommodation type

Table 24 Main accommodation used during visit

Type of accommodation	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Guest House / B&B/ Farm	33%	17%	0%	n/a
Rented Self Catering / Serviced Apartment	13%	4%	58%	n/a
Touring / motorised caravan	6%	22%	8%	n/a
Camping	27%	22%	0%	n/a
Hotel / motel/ inn/ lodge	7%	13%	0%	n/a
Home of friends and relatives	13%	9%	25%	n/a
Bunkhouse	0%	4%	0%	n/a
Caravan – static, owned	0%	9%	8%	n/a
Caravan – static, rented	0%	0%	0%	n/a
Hostel	0%	0%	0%	n/a
Boat	0%	0%	0%	n/a
Total	99%	100%	99%	n/a

Results exclude where no reply was given. Sample sizes: long stay= 15, short stay=23, holiday day trip =12 . Percentages are rounded to the nearest whole number so totals may not add up to 100%.

Booking method

Booking method	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Directly with accommodation establishment	57%	33%	36%	n/a
Didn't book in advance	7%	24%	27%	n/a
Internet	7%	14%	18%	n/a
Through Travel Agency / Tour Operator	14%	5%	0%	n/a
Through Central Reservation services	0%	5%	18%	n/a
Tourist Information Centre	14%	9%	0%	n/a
Other	0%	10%	0%	n/a
Total	99%	100%	99%	n/a

Results exclude where no reply was given. Sample sizes: long stay=14 short stay=21 holiday day trip =11 . Percentages are rounded to the nearest whole number so totals may not add up to 100%.

Reasons for visit

Table 25 Reasons for visit

Reasons	Influenced				Main reason			
	Long Stay	Short Stay	Holiday day trips	Day trips	Long Stay	Short Stay	Holiday day trips	Day trips
Scenery/landscape/ countryside	39%	35%	36%	28%	11%	23%	21%	8%
Peace and quiet	6%	10%	14%	16%	0%	3%	0%	0%
Activities	39%	16%	21%	28%	28%	6%	7%	28%
Previous visit	17%	10%	29%	24%	11%	10%	14%	12%
Historic interest	11%	3%	14%	8%	6%	0%	7%	4%
Easy to get to	11%	10%	36%	8%	0%	3%	7%	0%
Recommendation	6%	6%	0%	4%	6%	0%	0%	0%
Shopping	0%	13%	14%	15%	0%	6%	7%	0%
Event/festival	51%	47%	57%	20%	46%	41%	57%	20%
Visiting friends & relatives	17%	13%	7%	8%	11%	13%	7%	8%
Just passing through	11%	6%	43%	12%	11%	3%	14%	12%
Buying local arts and crafts	6%	13%	0%	16%	0%	3%	0%	4%
To visit a visitor attraction	6%	10%	0%	8%	6%	13%	0%	8%
Buying local produce	6%	3%	14%	4%	0%	3%	0%	0%
To attend a sporting event	6%	0%	0%	0%	0%	0%	0%	0%
Other	0%	12%	0%	8%	0%	9%	7%	8%
Don't know / none	0%	6%	7%	4%	0%	0%	0%	0%

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

Origin of visitors

Table 26 Origin of visitors

Where are you from?	% of respondents Long stay	Short stay	Holiday day trip	Day trip
Wales	22%	26%	7%	80%
London & SE England	23%	19%	43%	4%
SW England	11%	19%	21%	0%
West Midlands	0%	3%	0%	16%
East of England	6%	3%	0%	0%
East Midlands	0%	6%	0%	0%
NW England	11%	6%	0%	0%
Yorkshire & Humberside	0%	0%	7%	0%
North East	0%	0%	0%	0%
Overseas	0%	0%	0%	0%
Scotland	0%	3%	0%	0%
Ireland	0%	0%	0%	0%
Don't know / no answer	28%	13%	21%	0%
Total	101%	98%	99%	100%

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

Frequency of visit

Table 27 Frequency of visit

No of visits	% of respondents Long stay	Short stay	Holiday day trip	Day trip
This is my first visit	65%	67%	79%	32%
Once a year, or less	29%	11%	14%	32%
2-4 times a year	0%	4%	7%	14%
More than 4 times a year	6%	19%	0%	23%
Don't Know/ NA	0%	0%	0%	0%
Total	100%	101%	100%	101%

Levels of knowledge

Table 28 Levels of knowledge

Levels of knowledge	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Knew most things	0%	3%	0%	16%
Quite a lot	28%	29%	0%	24%
A little	6%	3%	29%	24%
Not very much	22%	32%	29%	20%
Nothing at all	44%	32%	43%	16%
Don't know / no answer	0%	0%	0%	0%
Total	100%	99%	101%	100%

Length of stay

Table 29 Length of stay

Length of stay (hrs)	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Less than 2	22%	13%	0%	32%
2 to 4	50%	48%	71%	36%
5 to 7	6%	3%	28%	28%
8 to 10	0%	0%	0%	4%
11 to 14	6%	0%	0%	0%
More than 14	6%	6%	0%	0%
Don't know / NA	6%	0%	0%	0%
Average (mean) number of hrs*	3.0	2.4	3.4	3.3

Note: The percentages exclude those who gave no response. Average mean number of hours excludes those staying more than 14 hours.

Information sources

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

Prior to visit

Table 30 Information sources used by visitors prior to arrival

Information sources	% of respondents Long stay	Short stay	Holiday day trip	Day trip
Internet	44%	32%	21%	4%
Guidebook	17%	0%	21%	0%
Advice / Word of mouth	22%	13%	14%	8%
Talgarth Tourist Information Centre	6%	10%	0%	0%
Mid Wales and Brecon Beacons Brochure	11%	3%	0%	0%
Other holiday brochure	17%	3%	21%	4%
Brecon Beacons National Park Visitor Guide	0%	3%	0%	4%
None obtained	0%	23%	14%	36%
Other info outlet	11%	3%	21%	4%
Articles in Newspaper / Magazines	0%	0%	7%	4%
Adverts in Newspapers / Magazines	0%	0%	14%	8%
Information at hotel /attraction	0%	6%	0%	0%
Visit to holiday exhibition	0%	0%	0%	0%
TV programme	0%	0%	0%	0%
Other	0%	0%	0%	4%
Don't know / No answer	22%	19%	29%	36%

Note: Percentages exceed 100% due to multiple answers. Caution: when 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.

During visit

Table 31 Information sources used by visitors whilst in Talgarth

Information sources	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Internet	6%	0%	0%	0%
Guidebook	11%	0%	7%	0%
Advice / Word of mouth	6%	16%	0%	4%
Talgarth Tourist information centre	50%	32%	64%	32%
Mid Wales and Brecon Beacons Brochure	6%	0%	7%	0%
Other holiday brochure	17%	3%	0%	0%
Brecon Beacons National Park Visitor Guide	22%	0%	0%	0%
None obtained	6%	23%	14%	40%
Other Info outlet	11%	6%	7%	0%
Articles in Newspaper / Magazines	0%	0%	0%	0%
Adverts in Newspapers / Magazines	0%	0%	0%	0%
Information at hotel /attraction	0%	0%	0%	0%
Visit to holiday exhibition	0%	0%	0%	0%
TV programme	0%	0%	0%	0%
Other	0%	0%	0%	4%
Don't know / No answer	33%	32%	21%	24%

Note: Percentages exceed 100% due to multiple answers. Caution: when 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.

Satisfaction

Table 32 Overall quality of visit to Talgarth

Overall rating	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Excellent	33%	35%	21%	28%
Good	44%	55%	57%	48%
Average	11%	10%	21%	20%
Poor	0%	0%	0%	0%
Very poor	0%	0%	0%	0%
Don't know / N.A	11%	0%	0%	0%

Table 33 Ratings of facilities, services and customer service

Factor	% excellent/good			
	Long stay	Short stay	Holiday day trip	Day trip
Scenery / countryside	95%	93%	85%	96%
General atmosphere	72%	67%	85%	60%
Feeling of welcome	72%	87%	79%	64%
Friendliness of local people	78%	97%	86%	64%
Quality of accommodation	56%	58%	28%	8%
Value for money	55%	71%	65%	44%
Range of visitor attractions / places to visit	50%	61%	50%	28%
Cleanliness of streets	67%	81%	86%	64%
Amount of info available about the area	61%	65%	86%	48%
Quality of information available about the area	61%	58%	79%	44%
Standard of signposting (road)	67%	51%	57%	60%
Availability of parking	44%	52%	72%	68%
Standard of signposting (pedestrian)	61%	51%	64%	56%
Range of eating places available	28%	48%	43%	12%
Range of shops	67%	55%	50%	28%
Availability of public toilets	61%	51%	78%	32%
Cleanliness of public toilets	45%	29%	29%	8%

Visitor expectations

Table 34 How did your visit to Talgarth compare with expectations?

	% of respondents			
	Long stay	**Short stay**	**Holiday day trip**	**Day trip**
Much better than expected	17%	16%	29%	16%
Bit better than expected	17%	13%	7%	0%
As expected	44%	52%	43%	56%
A bit disappointed	17%	3%	7%	4%
Very disappointed	0%	3%	0%	4%
Didn't know what to expect	6%	3%	7%	12%
Don't know / NA	0%	6%	7%	8%

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

Visitor interests

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

Table 35 Participation in leisure activities)

	% of respondents			
	Long stay	**Short stay**	**Holiday day trip**	**Day trip**
Go to pub/restaurant	72%	74%	50%	32%
Shopping	44%	26%	79%	20%
Sightseeing	56%	48%	71%	24%
Visit Attractions	61%	58%	57%	16%
Attend festival/ cultural/ agricultural event	45%	44%	50%	12%
Going to the theatre/show/concert	0%	3%	7%	0%
Going to the cinema	11%	0%	7%	0%
Attend sporting event as a spectator	6%	0%	0%	4%
None	6%	3%	7%	20%
Other	6%	0%	0%	4%
Don't know / NA	0%	6%	0%	12%

Table 36 Participation in activities

	% of respondents			
	Long stay	**Short stay**	**Holiday day trip**	**Day trip**
Walking	83%	55%	71%	44%
Riding and pony trekking	17%	0%	14%	8%
Cycling	17%	13%	7%	4%
Swimming	11%	6%	29%	8%
Creative Arts	0%	0%	29%	0%
Tennis	0%	0%	0%	0%
Water sports	22%	3%	0%	0%
Climbing /Abseiling	6%	0%	0%	0%
Motor Sports	0%	0%	0%	0%
Fishing	17%	16%	0%	4%
Golf	0%	0%	0%	0%
Gliding	6%	3%	7%	8%
Bird watching	0%	0%	0%	0%
Mountain boarding	0%	0%	0%	0%
Other	0%	6%	0%	0%
Don't know/ None/ NA	6%	0%	0%	28%

Percentages add up to more than 100% due to multiple choices

APPENDIX 2 – RESPONDENTS' COMMENTS

Please note: These comments are taken verbatim from respondents' questionnaires and so may include spelling and grammatical errors.

If your visit was better or worse than expected can you tell us the reasons?

Positive comments

- Festival organisation excellent
- Livelier than I thought it would be
- Beautiful scenery
- Lots of nice people
- The TIC is excellent a credit to Talgarth
- The tourist information centre is the best one I have ever been to very helpful. The scenery was spectacular and the waterfall
- Weather was good
- It was better because everyone was so friendly, we would love to had a longer stay
- I'd forgotten just how beautiful the surrounding area was. In particular the Black Mountains, Brecon and Brecon Beacons
- Looked very small but lots going on
- How this day is organised give us something to do rural attractions lots of things for the family to do
- Good helpful info at tourist information
- was great
- Friendly people
- We had lunch a sandwich pot of tea at the Old Radnor Barn. The lunch was good, the information re Talgarth's early history was given to us, read by proprietor which proved excellent. They were also very friendly and welcoming
- Great , thanks
- Better the office in the information centre was most helpful
- We had a wonderful day out in exceptional scenery helped with continous sun shine all day on the gliding site
- Talgarth's appearance has improved so much since a few years ago. It is so promising, the improvement should continue and be supported and funded
- Tourist information helpful

Negative comments

- Not a lot to do here very small

- Bad weather, nothing to do in the rain
- Not many shops available or cash machines
- Weather was poor
- Worse, the toilets, but the scenery is beautiful; esp the nature reserve we walked through,"pwll-y-wrach" we walked 8 miles all together
- Worse because Wednesday there was no Café open nor pub, better because the TIRC Talgarth offered me a coffee and made me welcome
- The weather -rained most of the time Talgarth seems to be a dying town. Every year the main street looks a bit more run down
- A great shame as area and town beautiful but the toilets could easily put people off for further visits, toilets are an important part of visitors impressions
- Public toilets were a disgrace, we went to the tourist office to complain and they kindly let us use theirs, they are not cleaned daily
- Over the years I have seen Talgarth getting worse and worse its now almost a Ghost Town looking drab and dreary, there's a beautiful church, show it off

If we could improve just one thing about Talgarth what should that be?

- Less empty premises
- Camping should be nearer the town
- Make it more tourist friendly
- More indoor places to visit in the rain
- Better weather
- Not so much rain
- Weather
- Public Toilets they are the worst I have ever seen, I couldn't bring myself to use them
- Improve the toilets or new ones they are disgusting. When I came last year they were just the same disgusting. I emailed Cllr William Powell last time and he said they would be sorted out
- The toilets
- It has a very run down atmosphere, Spend money on reversing its decline
- Needs a little updating, noticed a lot of empty buildings and does not appear to have many youngsters (although I visited on a weekday)
- Brighten the town up a bit bring some life back. There are lots of nice little villages in Wales, why can't something be done with Talgarth, it just needs a council with some energy and imagination
- Improved road signs in surrounding area

- Toilets were in a terrible state, unfit to use, blocked sinks and toilets smell, rubbish and filth had not been cleaned for days by the look of it
- Clean toilets
- Main cash machine
- Clean up the buildings make it look interesting, pay tourist staff who are very helpful and friendly, full of local knowledge unlike your bigger offices
- Bring back the bronking bull for the festival weekend
- Nice pubs and more restaurants
- Dog dirt- on the roads to and from the church and on side streets, charming little alleyways. Talgarth is a beautiful setting and has loads of potential to be a charming and fascinating place to visit
- Sorry not here long enough to answer, maybe pay tourist info officer
- Don't know just arrived
- Toilets condition
- Clear footpaths on Talgarth walks, many were overgrown, also tidy area around Castle, I know this is difficult but I am sure you could get some volunteers
- The town is a little run down
- Public transport poor, no tea room
- Amount of eating places only the New Inn/Thai restaurant was open (but very very very good)
- More dog friendly pubs/restaurants better tourist information
- Public conveniences building could be smartened up
- its ok
- More places to visit, more craft shops
- Don't know, just passing through
- Make area more attractive, flowers borders, more shops more emphasis on historical interest
- Nothing in particular
- Public toilets really horrible, peeling paint, no soap
- Don't really think of as tourist venue, if I didn't know about it most probably would not have come
- The weather
- Talgarth looks a little run down- I'd improve range of shops cafes eating places in Talgarth, to bring more people in the area, to make it like a mini Hay on Wye but with its own sense of identity, area around Talgarth is beautiful
- More shops, better parking
- More shops
- Have the public toilets cleaned by 06.00 visitor from the RSA passing through on

my way to Hay

- Decent modern clean toilets which didn't smell the ones used were in the main square are there any others?
- Remove the Hills
- because the stall we wanted is not here
- Open the church
- Public transport
- Not a lot here
- Some areas in the village do need tidying up, public toilets need a lot of work, not as good as other town and villages
- Weather
- I like it as it is
- A feature eating/drinking establishment on the river running throughout he town
- Decent toilets and coffee shop, the new one is overpriced and over-heated and noisy because of fridge motors
- Roeddwh yn gresynnu had oedor yr holidaur h… ar gad ya y Gymraeg
- Cheer up Bell street
- Good weather more visible signposting of areas of interest
- Smarten up some of the buildings