



REPORT

Neath Port Talbot Visitor Research
Exercise 2017

Neath Port Talbot Council

November 2017



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1. Executive Summary

Lots of day visitors	Neath Port Talbot attracts a high proportion of visitors spending the day in the area (89%), including 26% who visit for a day while staying elsewhere for a holiday or short break. In comparison, 12% of visitors stay within the county.
Coming back for more	Two thirds (66%) have visited before – Neath Port Talbot is a place that people like to return to.
Visiting with others	Most visitors either come as part of a family with young children (28%), as part of a couple (26%) or with friends (21%). Three quarters (76%) of visitors are married, or equivalent.
Online information	As most visitors have been before, most (59%) don't use any information to plan their trip. But if they do, the internet is most commonly used to plan (25%). Similarly, visitors pre-booking accommodation are more likely to go online (60%) than use the phone (28%) to book.
The great outdoors	Most people visit to take part in outdoor activities (61%) and to enjoy the landscape, countryside and beach (47%). In addition, 63% want to enjoy the natural scenery. Being outside is a key factor driving people to visit.
Mountain biking	Of visitors taking part in outdoor activities, half (48%) go mountain biking, primarily at Afan Forest and Glyncoerrwg Ponds. Most (88%) mountain bikers describe themselves as taking part in cross country riding.
Getting away from it all	A third (33%) of visitors want to enjoy the peace and quiet during their visit to Neath Port Talbot, and are more likely to head to Glyncoerrwg Ponds, Afan Forest or Pontneddfechan to achieve this.
NPT rates highly	Two thirds (65%) of visitors say their visit to Neath Port Talbot was 'very good' and a further 30% say it was 'fairly good'. In particular, visitors give high ratings to the quality of the natural environment, the friendliness of people and overall value for money.
Tweaking offerings	To improve satisfaction levels, some visitors would like to see more public toilets, car parks, places to eat and places to shop. Some offerings would also benefit from refurbishments or management, including children's play areas, toilet/changing facilities and mountain bike trails.

2. Background

Research context

Neath Port Talbot has seen significant investment in tourism infrastructure over the last ten years in particular in Afan Forest Park and at Aberavon Seafront.

In order to further establish Neath Port Talbot as a tourist destination, Neath Port Talbot Council (NPTCBC) has secured funding for an officer to drive forward and deliver a Tourism Business Development Project in the rural areas across Neath Port Talbot between 2016 and 2019.

One of the key aims of the Tourism Development in Neath Port Talbot Project is to assist tourism businesses by undertaking research on the needs and wants of visitors to the area.

As a result of this research businesses will be better informed and equipped to make decisions on their own marketing, investment and business development activity.

The research will also assist NPTCBC, the Neath Port Talbot Destination Management Steering Group and potential project funders to make informed decisions on future strategic priorities to encourage tourism development in the area.

Research overview

Neath Port Talbot County Borough Council commissioned Strategic Research and Insight to undertake a quantitative survey with visitors at key locations in the county. The survey captured information on:

- Visitor profiles
- Holiday types
- Motivation for visiting
- Activities
- Spending patterns
- Information sources
- Visiting patterns

The two-part project saw 1,137 interviews initially conducted in Neath Port Talbot, then follow up telephone interviews with 119 visitors.

The main interviews, which were available in English and Welsh, took place face-to-face between April and September 2017 across six sampling points:

- Margam Country Park
- Afan Forest Park Visitor Centre
- Glyncorrwg Ponds Visitor Centre
- Pontneddfechan
- National Trust Aberdulais Falls

- Aberavon Seafront

The report

This report has been designed to give details of the research findings.

Throughout the report, the results cover Neath Port Talbot as a whole. However, key findings are identified and highlighted by specific sampling location or visitor type where appropriate.

The overall sample of 1137 makes results of questions asked to everyone accurate to $\pm 2.9\%$, which is highly robust. Once the sample is broken down by location, that confidence interval falls between 6.6% and 7.6%.

Attached in the appendix are detailed cross-tabulations for a breakdown of questions by each of the six locations, for a closer examination of the results.

Who visits Neath Port Talbot?

The tables below give a breakdown of the profile of visitors by location.

Margam Park

Social class	Over half of (57%) visitors fall into the C1 category, with a further 21% in C2.
Origin	Like most other locations, the majority (83%) of visitors come from Wales. 16% are from England and 1% Scotland.
Working status	Well over half (58%) of visitors to Margam Park work full time, 16% work part time and 12% are retired.
Marital status	Four in five (79%) are married or equivalent, 13% single, and 6% widowed, divorced or separated.
Party type	Margam Park is the most likely location to attract families with young children (56%). 18% are couples and 7% visit with friends.
Spend	The average spend per party staying in NPT is £202.00, day visitors (including those staying outside NPT) £21.23 and £25.60 overall.

Afan Forest

Social class	Afan Forest is one of the locations with the highest proportion of ABs (17%). 47% are C1 and 30% C2.
Origin	While Welsh visitors make up the highest proportion (49%), visitors from England are very close behind (47%)
Working status	The majority of visitors (89%) work full time. 5% work part time and 3% are retired.
Marital status	Three quarters (73%) are married or equivalent, 21% are single.
Party type	A third (33%) of visitors are in Afan Forest with friends, 20% are couples and 15% visit alone.
Spend	The average spend per party staying in NPT is £296.82, day visitors £21.47 and £87.15 overall.

Glyncorrwg Ponds

Social class	More than half of visitors (54%) are C1s and 28% are C2s.
Origin	Just over half (53%) of visitors are from Wales, and 46% from England.
Working status	The vast majority of visitors (92%) to Glyncorrwg Ponds work full time.
Marital status	Glyncorrwg Ponds sees the highest proportion of single visitors (26%) compared to other locations. 70% are married.
Party type	The proportion of groups of friends is significantly higher (51%) in Glyncorrwg Ponds than all other locations. It also has more solo visitors (20%) than anywhere else.
Spend	The average spend per party staying in NPT is £198.68, day visitors £28.15 and £68.55 overall.

Pontneddfechan

Social class	Along with Afan Forest, Pontneddfechan attracts the highest proportion of ABs (17%). It also welcomes 63% C1s and 14% C2s.
Origin	Half of visitors (50%) travel from England and 39% from Wales. Pontneddfechan sees the highest proportion (10%) of overseas visitors.
Working status	Two in five (79%) visitors work full time. 9% are retired and 8% work part time.
Marital status	This location is slightly below the average for married visitors (70%). But it has the highest proportion of widowed, divorced or separated visitors (10%) and organised groups (5%)
Party type	Three in ten (31%) visitors are in a couple – higher than the average for NPT. One in five (21%) are families with young children and 18% are with friends.
Spend	The average spend per party staying in NPT is £235.77, day visitors £20.78 and £33.58 overall.

Aberdulais Falls

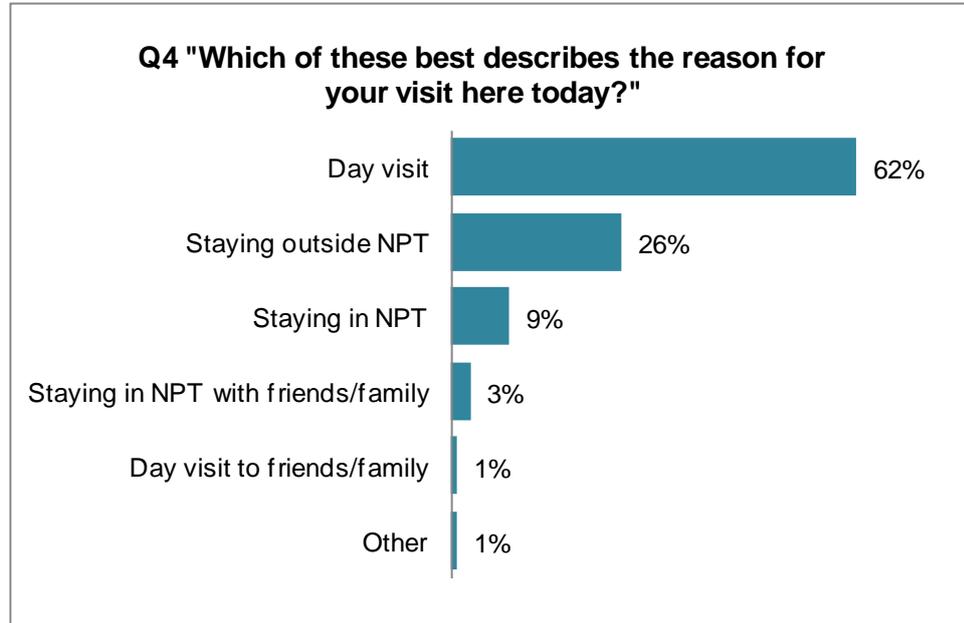
Social class	Six in ten visitors (62%) are C1s, 18% C2s, 11% ABs and 10% DE
Origin	Aberdulais Falls sees the highest proportion of visitors from England (57%). Two in five (39%) are from Wales.
Working status	Around a quarter (27%) of visitors are retired – higher than other locations. More than half (54%) work full time.
Marital status	Along with Aberavon seafront, Aberdulais Falls sees the highest proportion of married visitors (83%). 9% are single.
Party type	Aberdulais Falls attracts the highest proportion of couples (42%). A quarter (26%) are families with young children. It has the lowest proportion (2%) of people visiting alone.
Spend	The average spend per party staying in NPT is £580.77, day visitors £26.34 and £61.25 overall.

Aberavon Seafront

Social class	Aberavon seafront attracts the highest proportion of DEs (17%) and a lower proportion of ABs (8%). Two thirds are C1.
Origin	A strong majority (89%) of visitors are from Wales and 10% travel from England.
Working status	While 63% of visitors are full time workers, the seafront also attracts a higher proportion (15%) of retired visitors, compared to most other locations.
Marital status	Aberavon seafront shares the highest proportion of visitors (83%) with Aberdulais Falls. 11% are single.
Party type	A higher than average proportion (42%) of visitors are families with young children. The seafront also attracts more couples (31%) than average.
Spend	The average spend per party staying in NPT is £246.55, day visitors £24.46 and £39.00 overall.

3. Time Spent in Neath Port Talbot

Day visitors and staying visitors



Base: 1137

Most visitors are here for the day

Neath Port Talbot is a destination that attracts a high proportion of people visiting for the day. Overall, 89% of visitors are in the county for the day, including those seeing friends and family.

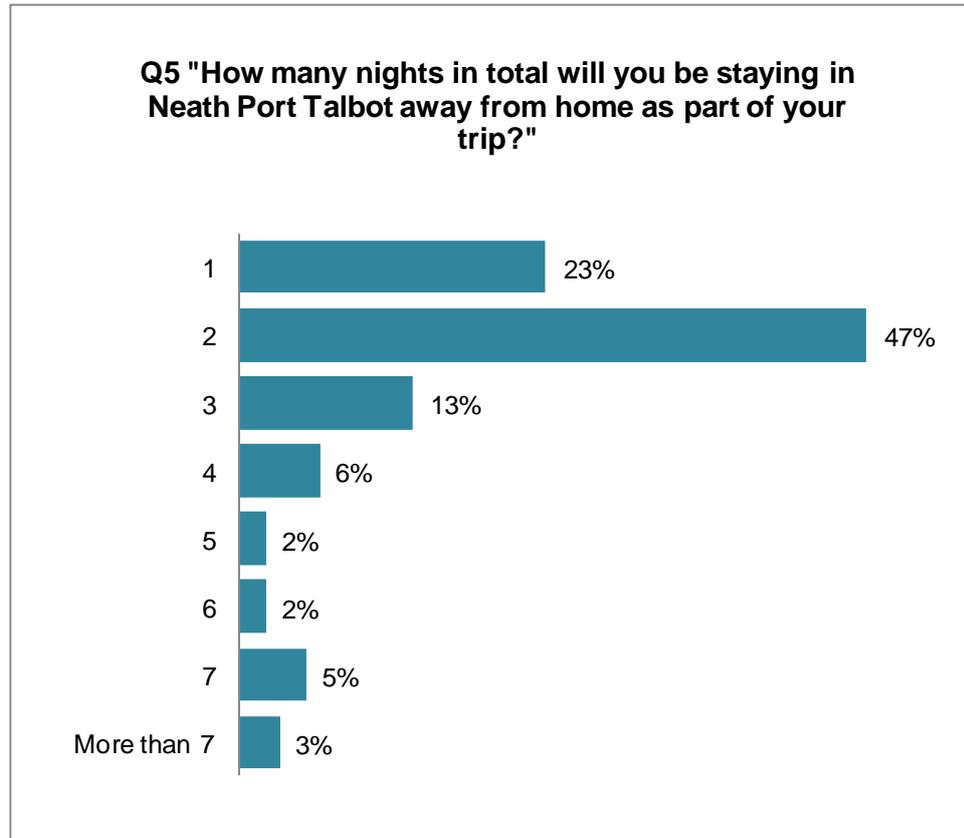
Some locations are more likely to attract day visitors than others. The majority (88%) of visitors at Aberavon seafront are there for the day, as are 80% of visitors spending time in Margam Park.

Staying visitors head to waterfalls

While the majority of visitors in Neath Port Talbot are there for the day, some locations are welcoming more staying visitors – in particular locations with waterfalls.

Well over half of visitors at Aberdulais Falls (58%) and Pontneddfechan (54%) are staying visitors, although most are staying outside Neath Port Talbot.

Staying visitors – how long do they stay?



Base: 126

Heading to NPT for a short break

The majority of staying visitors are in Neath Port Talbot for a short break. Around half (47%) spend two nights in Neath Port Talbot away from home, a quarter (23%) for one night and 13% have a three-day break.

Just 5% of staying visitors stay in Neath Port Talbot for seven nights. These visitors either stay with friends or family, in a holiday home or book into self catering accommodation for the week.

Visitors staying more than seven days are in Neath Port Talbot staying with friends or family and have all been before, but not in the last 12 months.

Out of all visitors in Neath Port Talbot, 12% are staying in the county. This includes 3% who stay with friends and family.

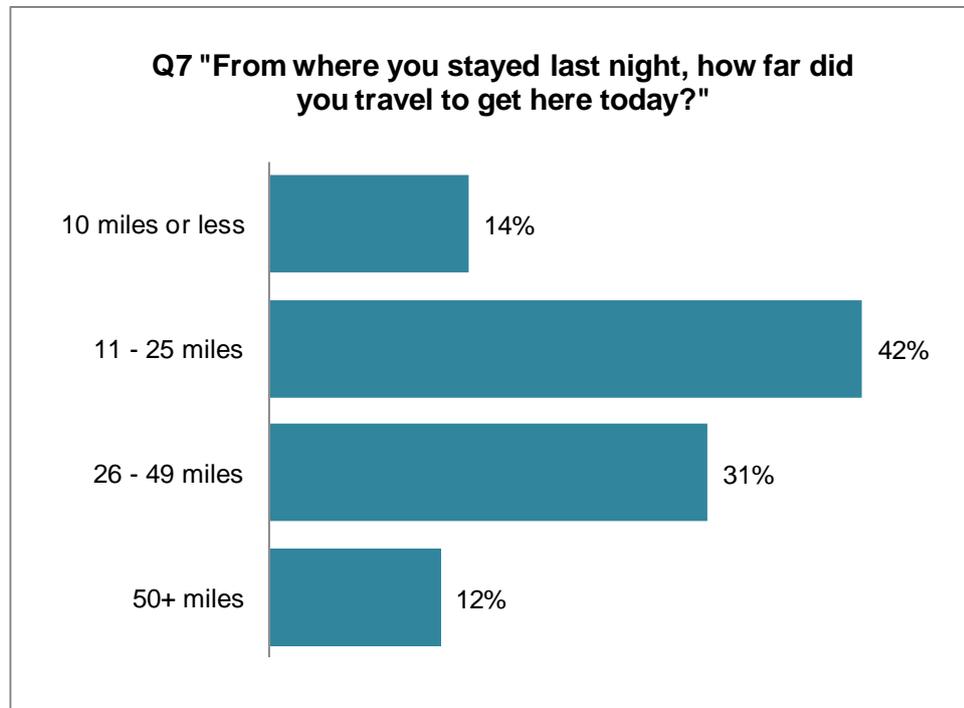
Around a quarter (26%) of staying visitors, stay outside of Neath Port Talbot for their holiday or short break. Most stay in nearby counties and travel short distances to get to Neath Port Talbot for a visit.

Outside of Neath Port Talbot, visitors stay in the following counties:

County	Proportion
Swansea	27%
Powys	19%
Merthyr Tydfil	11%
Bridgend	10%
Pembrokeshire	8%
Cardiff	6%
Carmarthenshire	6%
Rhondda Cynon Taff	4%
Monmouthshire	3%
Vale of Glamorgan	2%
Torfaen	1%
Blaenau Gwent	1%
Caerphilly	1%
Gwynedd	1%
Don't know	2%

Distance travelled to NPT

This question was asked to visitors who were either in Neath Port Talbot for the day, or staying outside of the county.



Base: 1002

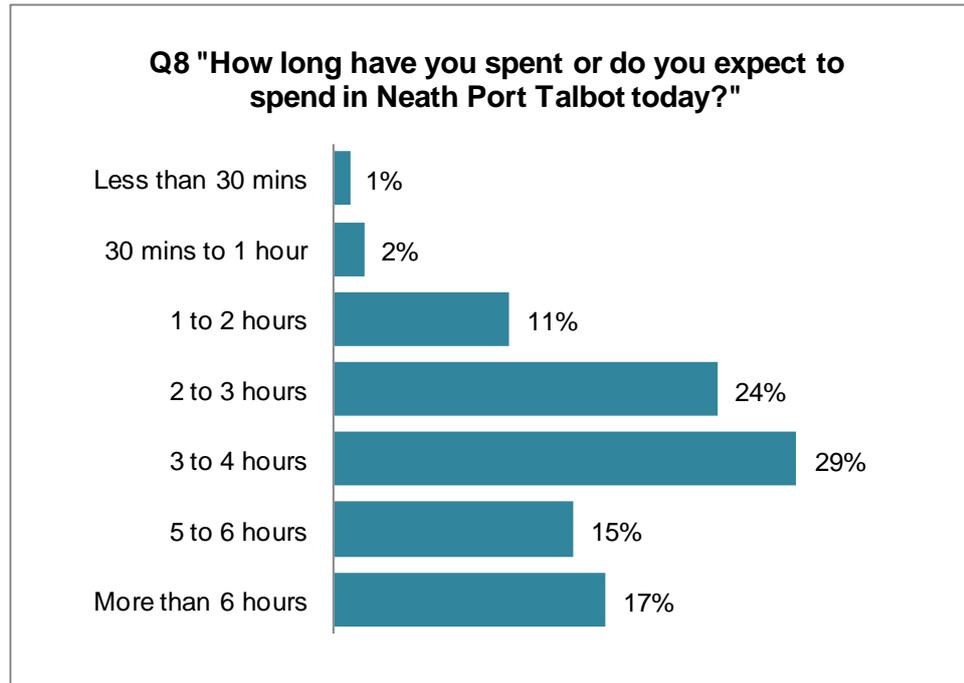
People travel furthest to reach Glyncorrwg Ponds

Out of all the locations, visitors at Glyncorrwg Ponds travel the furthest. Nearly a quarter (22%) travel more than 50 miles and a further 37% between 26 and 49 miles to get to their destination.

Shorter distances to Margam Park

Three in ten (29%) visitors travel less than ten miles to reach Margam Park, which attract parents with children wanting to enjoy the play area and dog walkers. Only 6% travel more 50 miles or more.

Time spent in NPT in a day



Base: 1137

Staying more than two hours

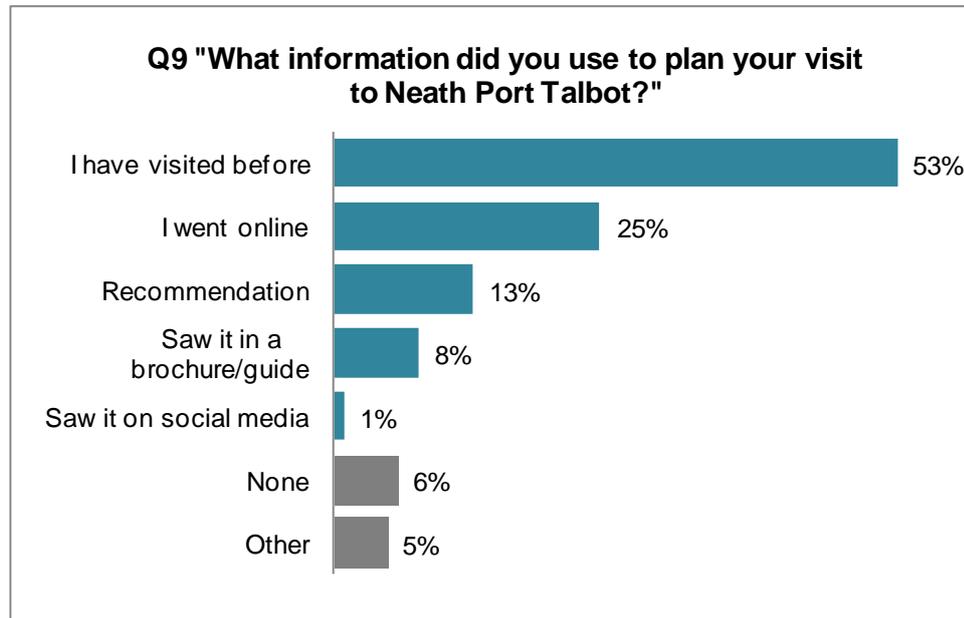
Most visitors – whether they are staying or day visitors – spend more than two hours in Neath Port Talbot in a day.

Around a quarter (24%) spend two to three hours in the county, while three in ten (29%) stay for three to four.

Higher proportions for visitors spend longer in Afan forest (30% spend more than six hours) and Glyncorrwg Ponds (27% spend more than six hours).

4. Information sources

How do visitors plan their visit?



Base: 1137

Previous visits help planning

More than half (53%) of visitors say that they have spent time in the area before, and this helped them plan their most recent trip to NPT. This is often the case in visitor studies.

Day visitors are much more likely to plan their trip based on a previous visit (69%) compared to staying visitors (26%).

Previous visits are also more likely to influence visitors to Aberavon seafront (73%), Glyncorrwg Ponds (68%), Afan Forest (65%) and Margam Park (63%), while only 16% of people visiting Aberdulais Falls say that they planned their trip after a previous visit to the area.

Logging on for inspiration

Unsurprisingly, the internet is a key source of information and planning, with a quarter (25%) going online to plan their visit.

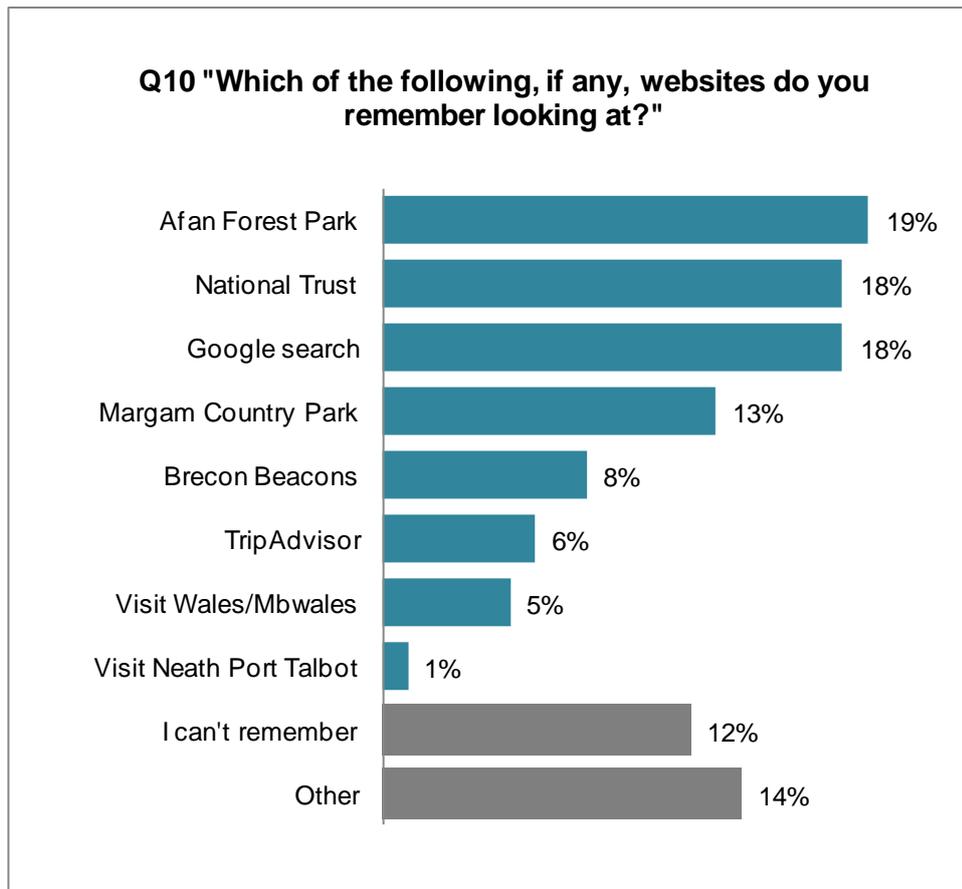
Again, staying visitors are more likely to plan their visit online (39%) compared to day visitors (17%).

Higher proportions of people going to Aberdulais Falls (42%) and Pontneddfechan (35%) plan online than other locations.

Glyncorrwg recommendations help plans

Overall, recommendations from others help 13% plan their visit. Nearly a quarter (23%) of visitors at Glyncorrwg Ponds say that recommendations from friends or relatives helped plan their visit. This is also true for 17% of visitors to Afan Forest and Pontneddfechan.

Websites



Base: 278

Key sources of online information

Visitors who said they went online to plan their visit were asked which websites they remembered looking at.

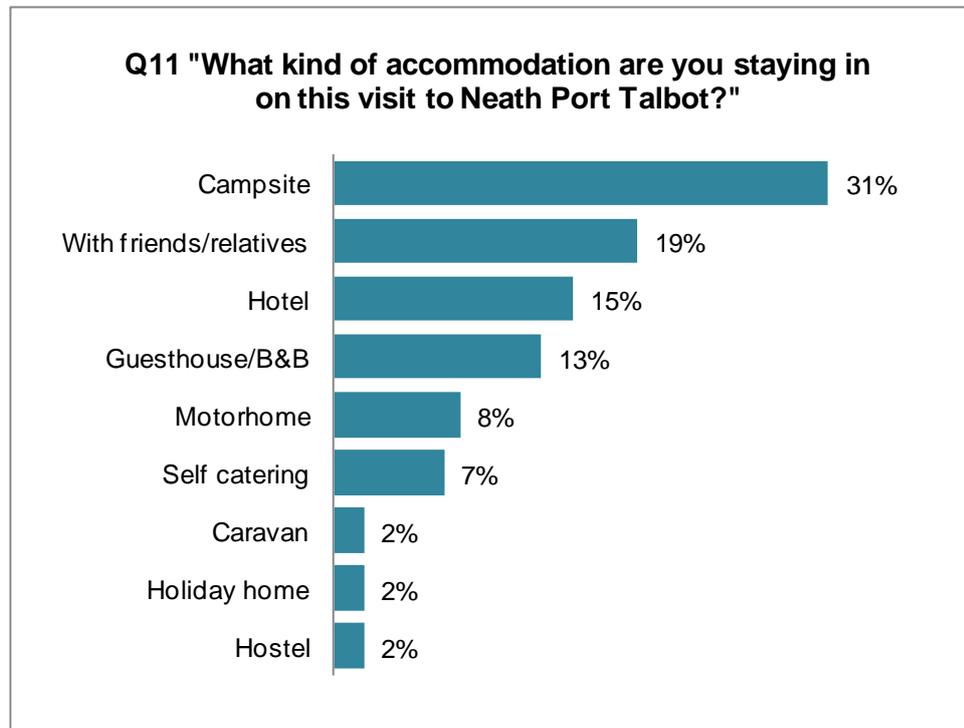
While the above chart shows the overall responses of visitors who went online, it is unsurprising that the websites used vary hugely by location. The Afan Forest Park website was looked at by 77% of those visiting Afan Forest, along with 50% of visitors at Glyncorrwg Ponds.

The National Trust's website was viewed by 65% of visitors at Aberdulais Falls, a National Trust site. Margam Country Park's website was looked at by 75% of those who visited the park.

5. Accommodation

The following section applies to visitors who stayed at least one night in Neath Port Talbot.

Chosen accommodation



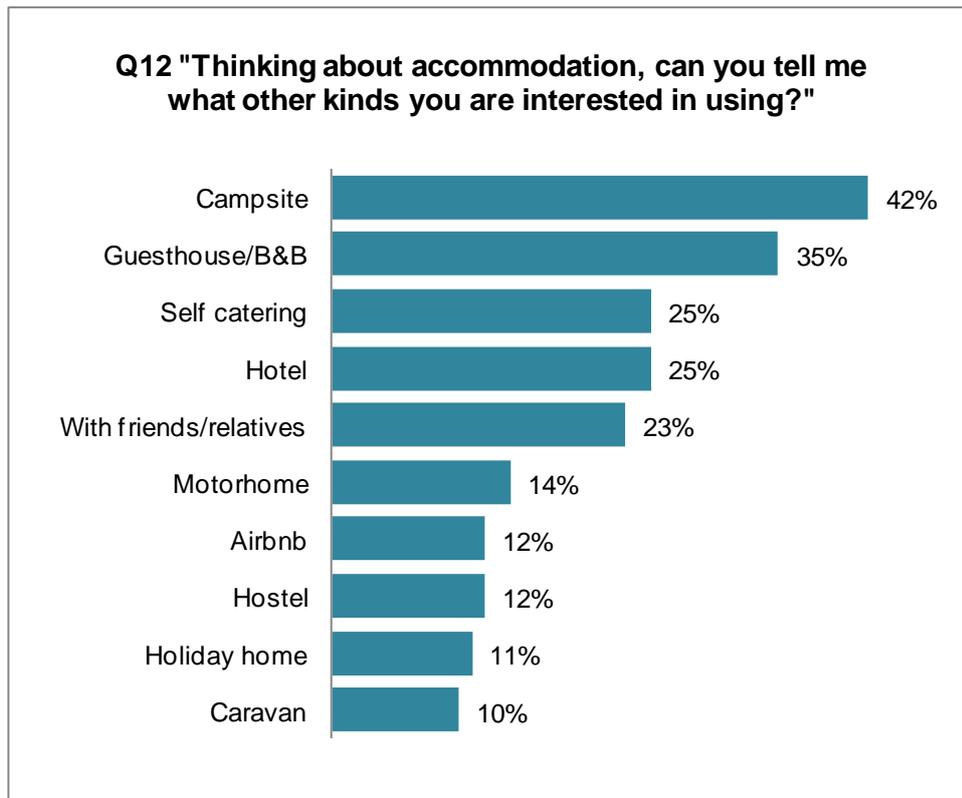
Base: 126 (only visitors staying in Neath Port Talbot)

Pitching up at campsites

Three in ten (31%) visitors staying in Neath Port Talbot opted to camp during their holiday or short break.

Around half (49%) of visitors at Glyncorrwg Ponds camped during their stay. This is a significantly higher proportion than any other location.

Other accommodation interests



Base: 126 (only visitors staying in Neath Port Talbot)

Campsites are popular

Around two in five (42%) visitors staying in Neath Port Talbot say that they are interested in camping – a significantly higher proportion than the 10% interested in staying in a caravan.

Guesthouses and B&B are of some interest to 35% of staying visitors, while a quarter (25%) are interested in self catering accommodation and hotels.

Quality checks



Base: 126 (only visitors staying in Neath Port Talbot)

Past experience gives peace of mind

Nearly half of visitors staying in Neath Port Talbot say that they already knew the accommodation they had chosen was of suitable quality because they had stayed there before.

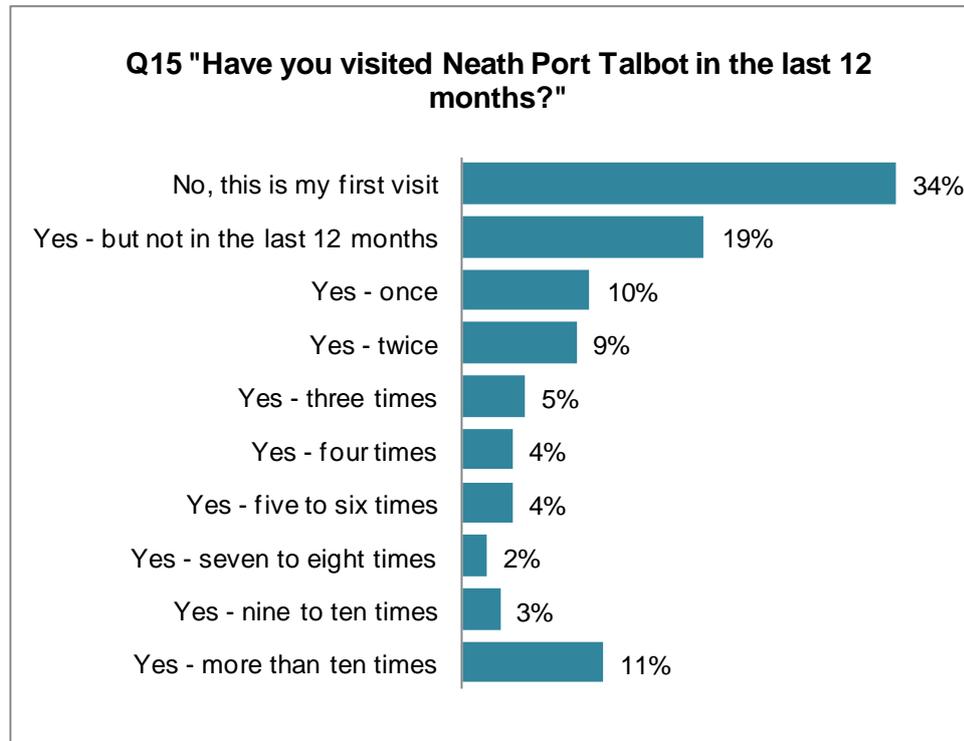
A further third (32%) researched their accommodation choice online before they visited the county. Visitors use a range of websites to check their accommodation, including:

- Trip Advisor
- Google searches
- Afan Forest website
- Facebook
- Laterooms.com
- Visit Wales

A quarter (26%) booked their accommodation after it was recommended to them.

6. Motivations and Activities

Previous visits



Base: 1137

First time visitors head to NPT

For a third (34%) of visitors in Neath Port Talbot, their experience in the county is their first. A higher proportion of first time visitors spend time at Aberdulais Falls (52%) and Pontneddfechan (49%).

Staying visitors are more likely to be in NPT for the first time (63%) compared to day visitors, of which 16% are new to the area.

Seafront welcomes lots of return visitors

Overall, 11% of visitors say that they have visited NPT more than ten times in the previous year. But for those spending time around Aberavon seafront, the proportion of visitors that keep coming back is significantly higher, with 29% saying they have visited more than ten times in the previous 12 months.

These visitors are more likely to be day visitors. While only 1% of staying visitors have visited more than ten times, this proportion rises to 18% for day visitors.

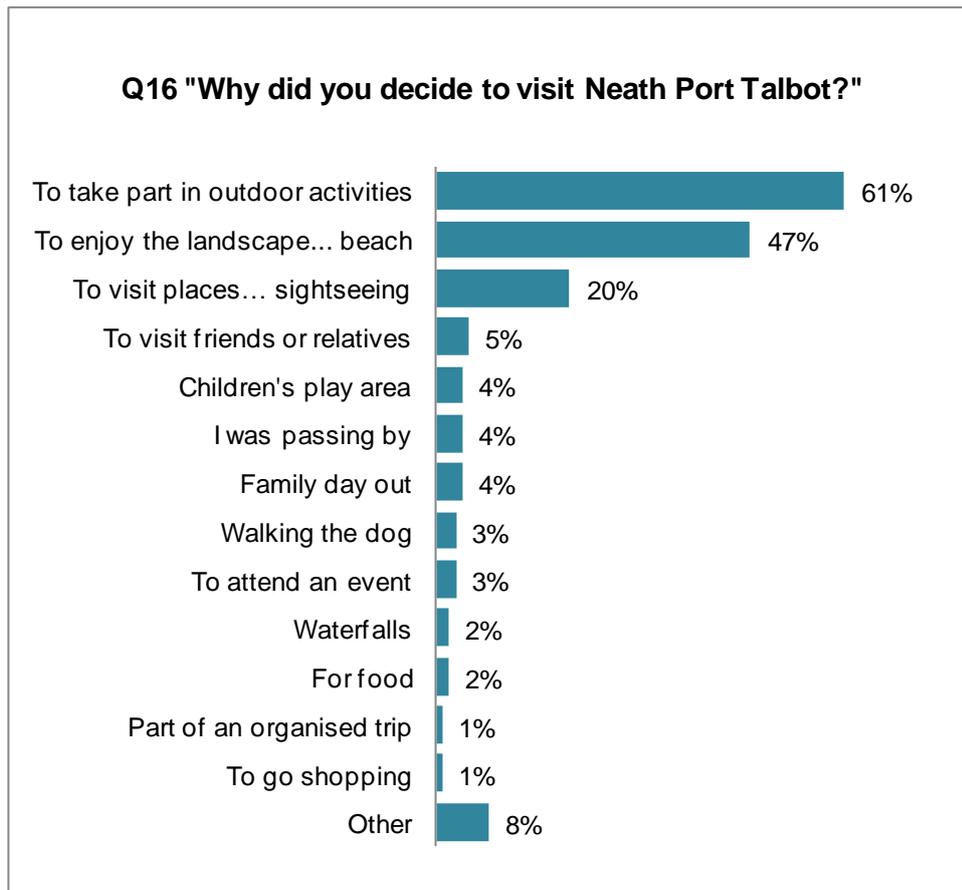
Coming back again and again

Visitors who have been to Neath Port Talbot more than ten times in the last 12 months, have visited an average of 40 times.

Aberavon seafront is a popular destination for visitors who keep coming back (37%), along with Afan Forest (27%).

The vast majority (97%) are day visitors who travel shorter distances (52% 11-25 miles; 28% less than 10 miles) and come to take part in outdoor activities (62%) and to enjoy the landscape, countryside or beach.

Why do they come?



Base: 1137

The great outdoors

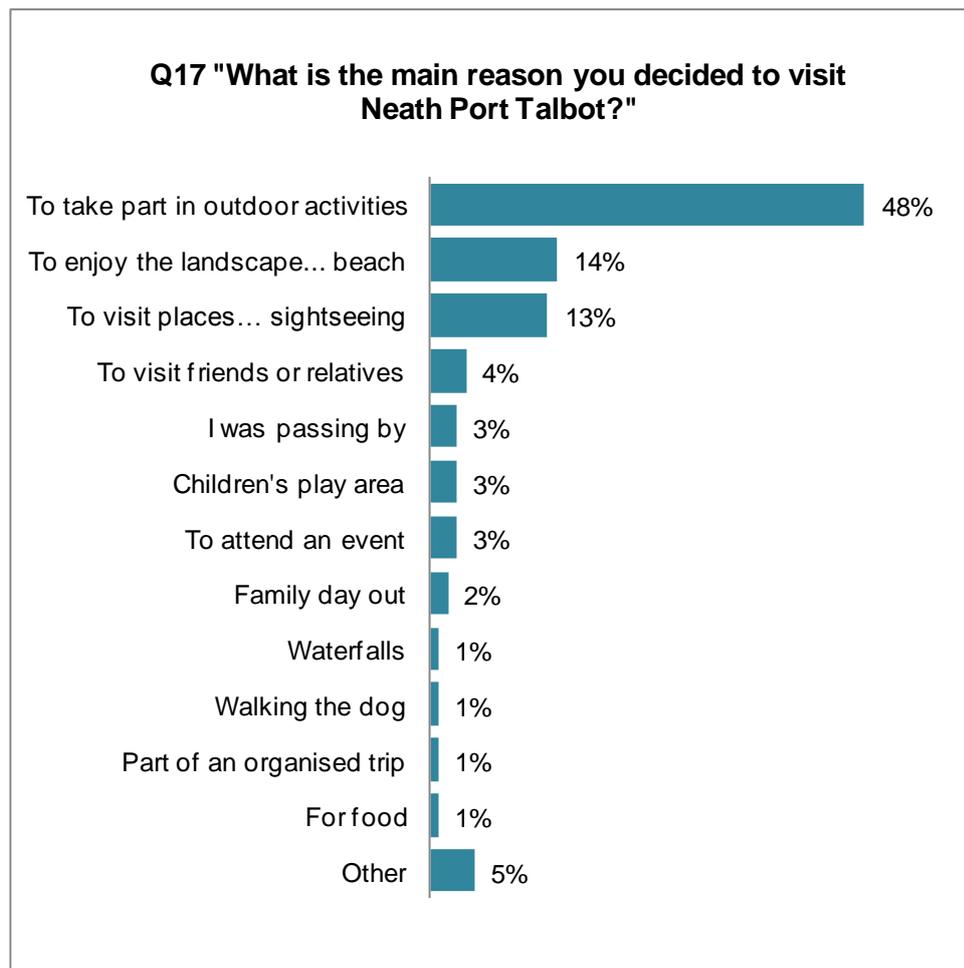
The most frequently mentioned reason people decide to visit Neath Port Talbot is 'to take part in outdoor activities', with 61% of all visitors citing this as a reason to head to the destination.

The vast majority of visitors at Pontneddfechan (95%), Afan Forest (92%) and Glyncorrwg Ponds (90%) say that outdoor activities are a reason for their visit.

While a lower proportion, nearly half (47%) of visitors at Margam Park say the same, as do 30% at Aberavon seafront.

However, only 3% of visitors at Aberdulais Falls say they decided to visit 'to take part in outdoor activities'. Rather, 46% say that they wanted 'to visit places / historical sites / specific attractions / sightseeing'. And a further 17% say that they were 'passing by'.

Main reason for visit



Base: 1137

Outdoor activities are a big pull

Understanding why people visit a destination is vital when developing tourism development projects and marketing strategies. For Neath Port Talbot, outdoor activities are a huge draw, with around half (48%) of all visitors citing it as the main reason for their visit.

Motivations the same for staying and day visitors

Interestingly, there are no significant differences between motivations between staying and day visitors. But there are differences between locations.

Locations have different draws

Taking part in outdoor activities is, by far, the most common reason people visit Afan Forest (87%), Glyncorrwg Ponds (83%) and Pontneddfechan (63%).

While outdoor activities is the most frequently mentioned reason visitors spend time at Margam Park (26%), the main reason others visit include 'to enjoy the landscape /

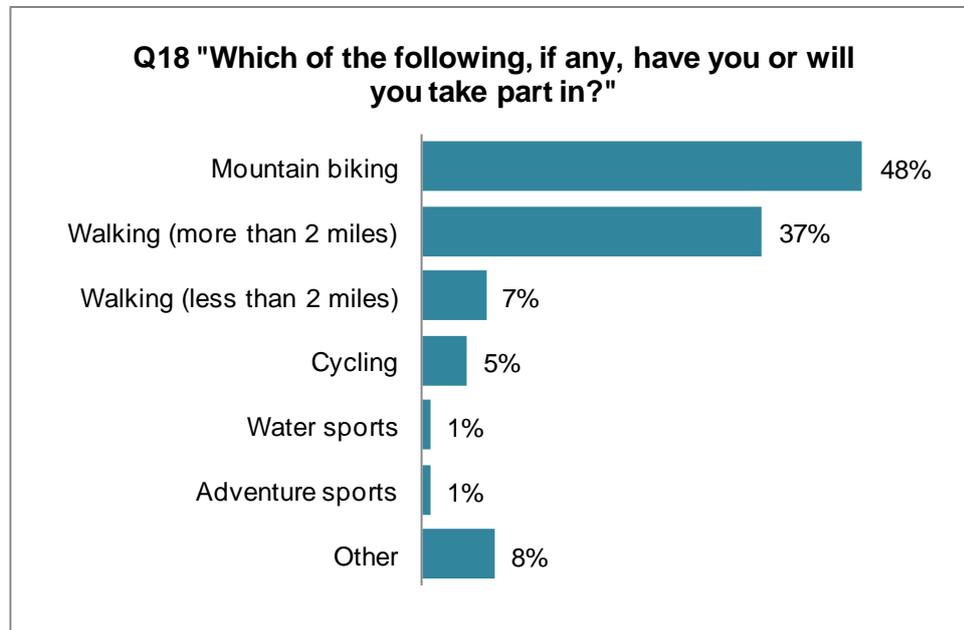
countryside / beach' (16%), 'to visit places / historical sites / specific attractions / sightseeing' (13%) and 'children's play area' (13%).

For Aberavon seafront, it is unsurprising that the most commonly mentioned main reason for their visit is 'to enjoy the landscape / countryside / beach' (41%), with a further 23% saying that they wanted to 'take part in outdoor activities'.

Aberdulais Falls, which is a National Trust site, has a different draw. For 43% of visitors to this site, 'to visit places / historical sites / specific attractions / sightseeing' is the main reason for their visit. While 15% say they were 'passing by'.

Outdoor activities

Visitors who said they were visiting NPT to take part in an outdoor activity were asked what activities they had, or were going to, take part in.



Base: 536

Mountain biking is big business for NPT

The adventurous and varied terrain of Neath Port Talbot makes it a popular destination for mountain bikers. In fact, nearly half (48%) of all visitors taking part in outdoor activities say that they were jumping on their mountain bike.

The vast majority of these mountain bikers either head to Afan Forest (83% of activities are on a mountain bike at this location) or Glyncorrwg Ponds (85%).

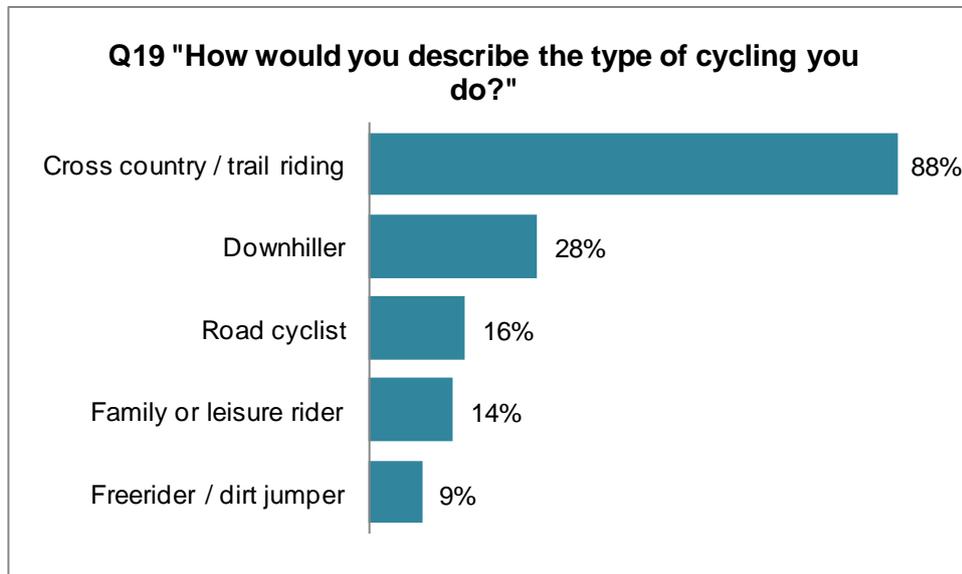
Lacing up those walking boots

Nearly two in five (37%) visitors who take part in an outdoor activity say that they walk more than two miles. These walkers head to the beautiful Pontneddfechan (92% of outdoor activity visitors at the site) and Margam Park (63%).

At Aberavon seafront, 37% of visitors taking part in an outdoor activity walk more than two miles, and a further 29% walk less than two miles.

Mountain biking

Visitors who say that they have or were planning on cycling, were asked to describe the type of cyclist they are. They could describe their cycling style in more than one way.



Base: 283

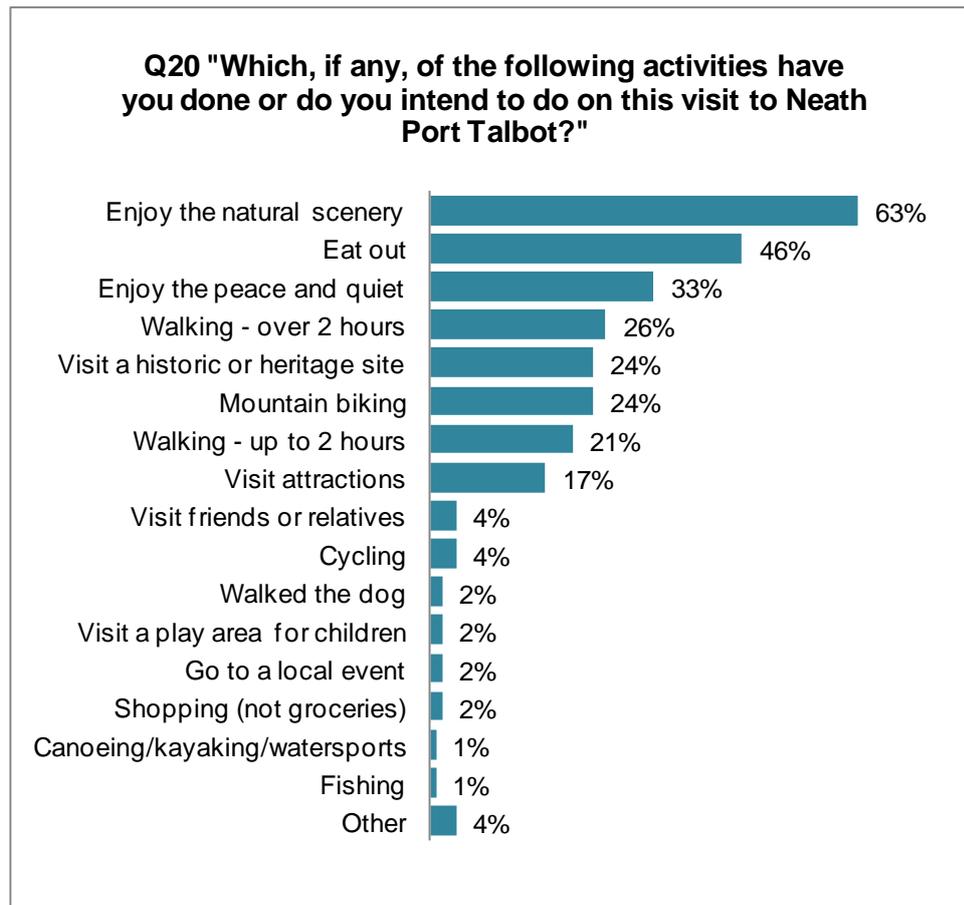
Cross country riders lead the way

The majority of visiting cyclists in Neath Port Talbot describe themselves as doing cross country cycling, or trail riding. This includes nearly all (95%) cyclists at Glyncorrwg Ponds and 84% at Afan Forest.

Downhill riding is also popular, with 30% at Afan Forest and 25% at Glyncorrwg Ponds describing this as their cycling style.

Out of the two destinations, Afan Forest is more likely (18%) to attract family or leisure riders compared to Glyncorrwg Ponds (7%).

All activities



Base: 1137

The attraction of natural scenery

As a destination, Neath Port Talbot sits in an enviable position. It has a coastline, wide-ranging hills, waterfalls, open countryside and forestry. The county is also the gateway to the Brecon Beacons National Park.

With so much variety, it is not surprising that nearly two thirds (63%) of visitors want to enjoy NPT's natural scenery, including three quarters (76%) of visitors at Glyncorrwg Ponds.

Margam Park

For visitors at Margam Park, the most frequently-mentioned activity (59%) is enjoying the natural scenery. Nearly half (49%) say they wanted to visit attractions and a similar proportion (47%) look forward to eating out.

Margam Park is also a destination for those wanting to enjoy a walk of less than two miles, with 42% of respondents at this destination going for a short walk, while the proportion of those taking on a longer walk is 27%.

Compared to other destinations, it also has the highest proportion of people visiting a play area for children (11%).

Afan Forest

Three quarters (74%) of visitors at Afan Forest say they will be making the most of their surroundings by jumping on their mountain bike. This adventurous activity is a real draw to the area.

Like other destinations, the natural scenery of the forest is also a pull, mentioned by 59% of visitors. And for half (49%), it's the peace and quiet that they will be enjoying.

Glyncorrwg Ponds

As previously mentioned, Glyncorrwg Ponds is a great destination for people wanting to enjoy the natural scenery, which is mentioned by three quarters (76%) of these visitors.

But a similar proportion (72%) also use their visit to go mountain biking, exploring Neath Port Talbot from their bike seat.

Glyncorrwg Ponds is the destination most likely to attract those wanting to enjoy the peace and quiet, with half (49%) citing this at the locations, compared to a third (33%) overall.

Pontneddfechan

Walkers are most likely to head to Pontneddfechan, compared to other areas. This Brecon Beacons-boardering village boasts stunning waterfalls and is a popular destination for visitors wanting to walk for more than two miles (82%).

The natural scenery (61%) and peace and quiet (49%) add to the experience.

Aberdulais Falls

Unsurprisingly, National Trust attraction Aberdulais Falls is the location most likely to attract visitors wanting to visit a historic or heritage site (92%).

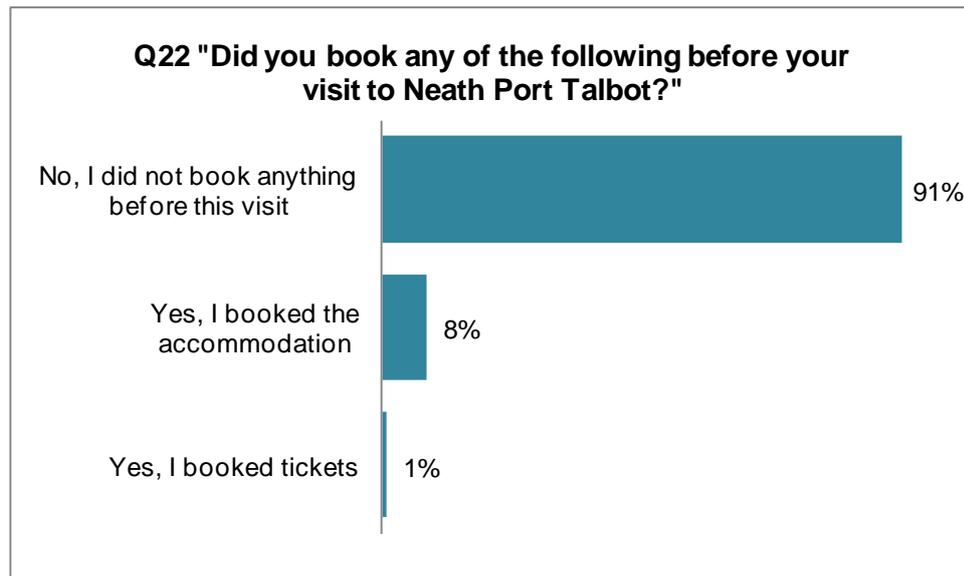
Also often mentioned is the natural scenery (66%) which goes hand-in-hand with the location and eating out (61%).

Aberavon Seafront

Eating out is also a regular occurrence for those visiting the seafront (59%), closely followed by the natural scenery (56%).

Aberavon also attracts the more leisurely walkers, with nearly half (46%) of visitors saying they were going to walk up to two hours.

Pre booking



Base: 1137

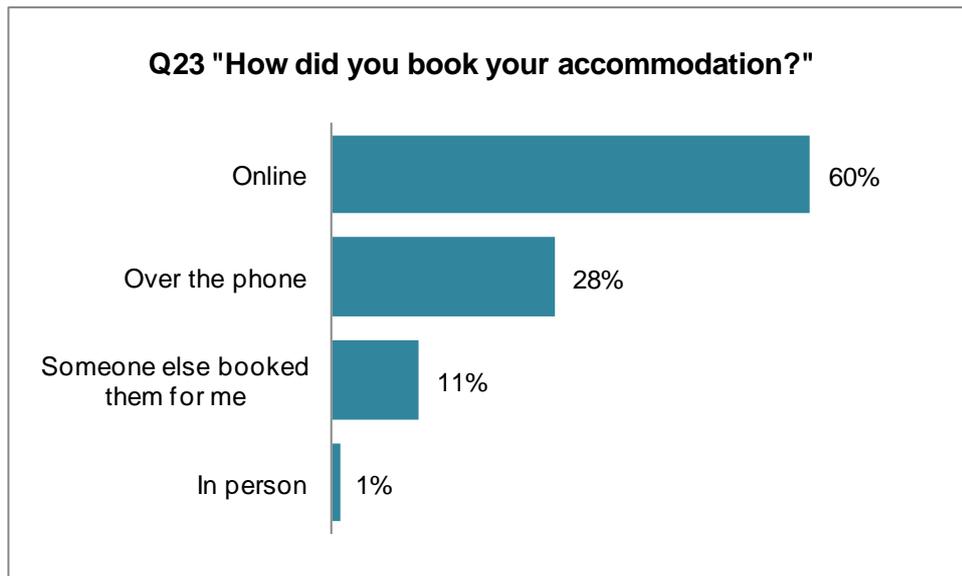
Staying visitors more likely to pre-book accommodation

Unsurprisingly, it is the staying visitors who are pre-booking more often, compared to those in Neath Port Talbot for the day.

Two thirds (64%) of visitors staying in Neath Port Talbot pre-book their accommodation before they arrive.

This may seem like a fairly low percentage, as it means a third does not. But of these visitors staying in the county who did not pre-book their accommodation, 44% stay with friends and family, 27% opt for camping and 16% stay in a motorhome.

Booking accommodation



Base: 95

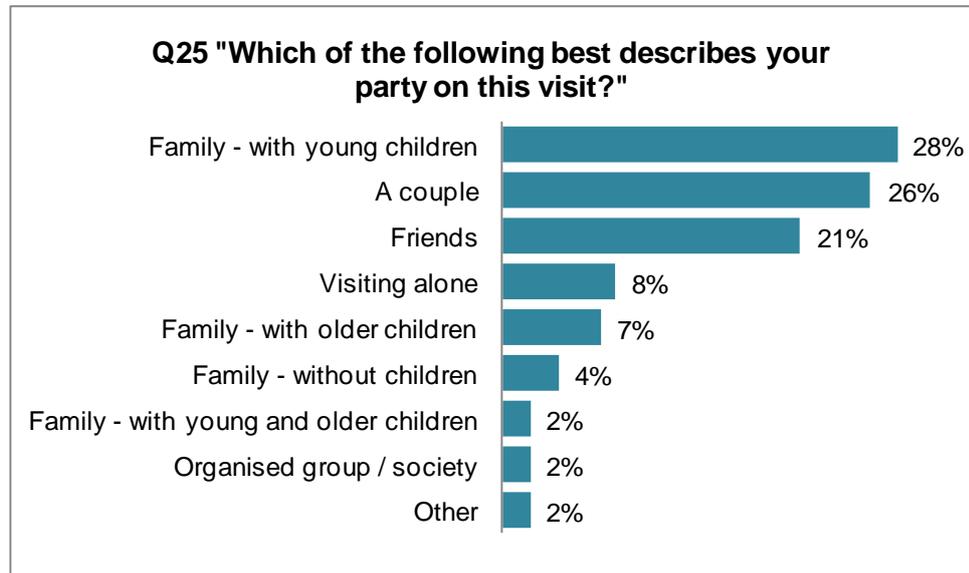
Going online

The internet is the route most commonly taken for visitors pre-booking their accommodation (60%), while one in three (30%) book over the phone.

Visitors were also asked if and how they booked tickets. When it comes to pre-booking tickets, the internet is also the route most take. Out of the ten visitors who booked a ticket before visiting Neath Port Talbot, six went online, two people booked over the phone and two people booked in person.

7. Profile and Origin of Visitors

Party type



Base: 1137

Young families, couples and friends

As a destination, Neath Port Talbot primarily attracts families with young children (28%), couples (26%) and people visiting with friends (21%).

But individual locations can differ. Families with young children are much more likely to visit Margam Park (56%) and Aberavon seafront (42%) but less likely to be at Glyncorwg Ponds (5%) or Afan Forest (16%).

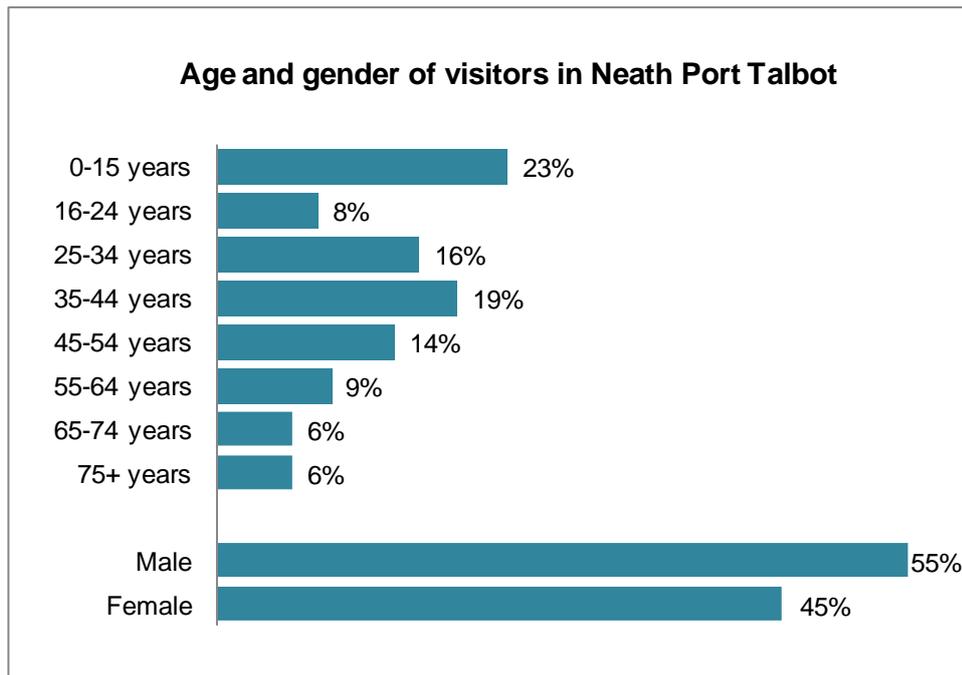
On the other hand, more couples head to Aberdulais Falls (42%), Pontneddfechan (31%) and Aberavon seafront (31%) than Glyncorwg Ponds (16) or Margam Park (18%).

People visiting with friends can often be found enjoying Glyncorwg Ponds (51%) and Afan Forest (33%) rather than Margam Park (7%), Aberdulais Falls (8%) and Aberavon seafront (10%).

Visiting Glyncorwg Ponds alone

Glyncorwg Ponds sees the highest proportion of people visiting Neath Port Talbot by themselves (20%), compared to Aberdulais Falls (2%), Margam Park (4%) and Aberavon seafront (5%).

Age of visitors



Base: 1137 parties

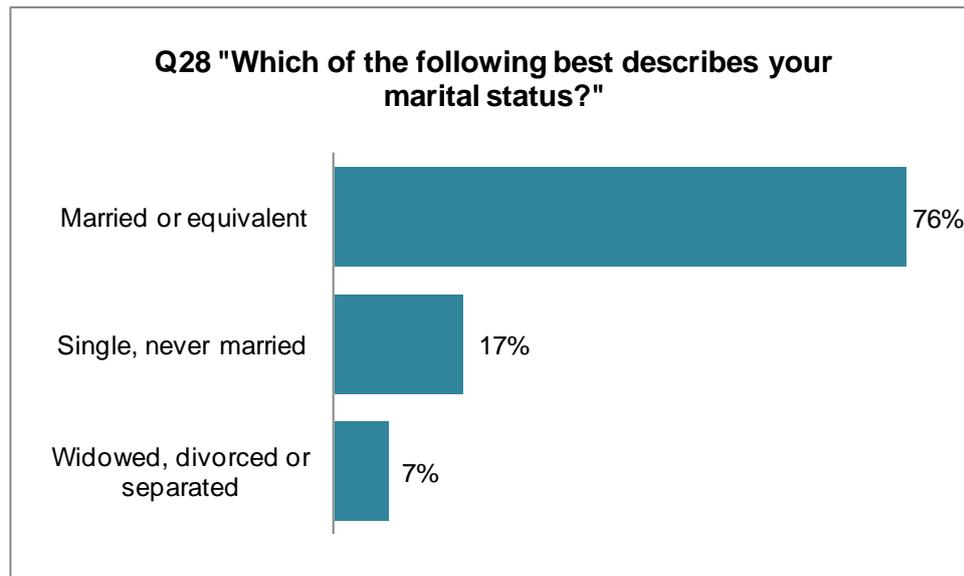
Families and young children

All respondents were asked how many people in their party fell into each age bracket. The above chart shows that around a quarter (23%) of visitors are children under 16, 19% are people aged 35-44 years and 16% are 25-34 years. This reflects the high proportion of families with young children visiting the area.

Slightly more males head to NPT

Just over half (55%) of all visitors – including adults and children – in Neath Port Talbot are male, and 45% are female.

Marital status



Base: 1128

Majority are married

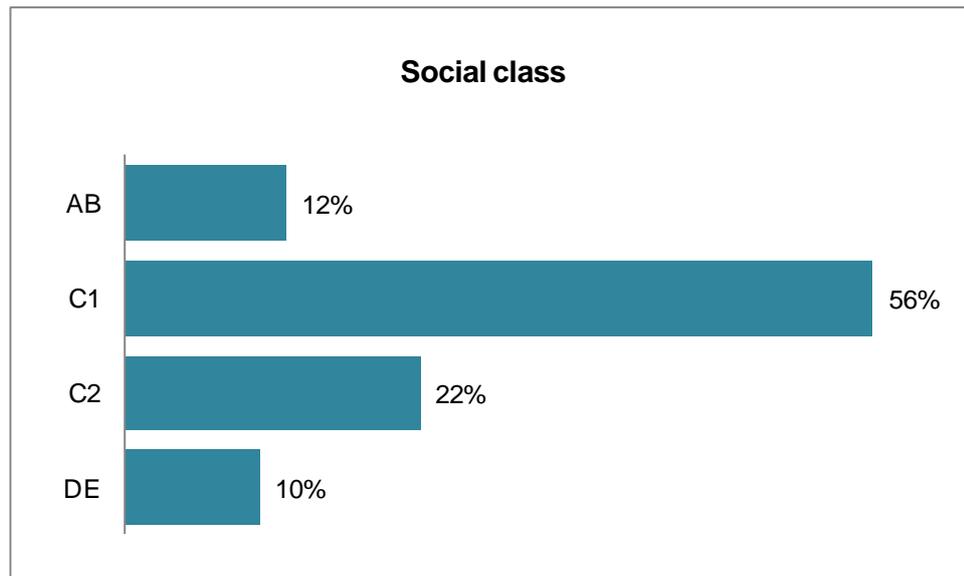
Most visitors to Neath Port Talbot are married. While that is also true for each of the six locations, there are some differences.

Higher proportions of married people visit Aberdulais Falls (83%), Aberavon seafront (83%) and Margam Park (81%) than other locations.

Whereas higher proportions of single people visit Glyncorrwg Ponds (26%), Afan Forest (21%) and Pontneddfechan (20%) than the other three.

Pontneddfechan is more likely to attract people who are widowed, divorced or separated (10%) compared to the other five locations.

Social class



Base: 1128

C1s head to Neath Port Talbot

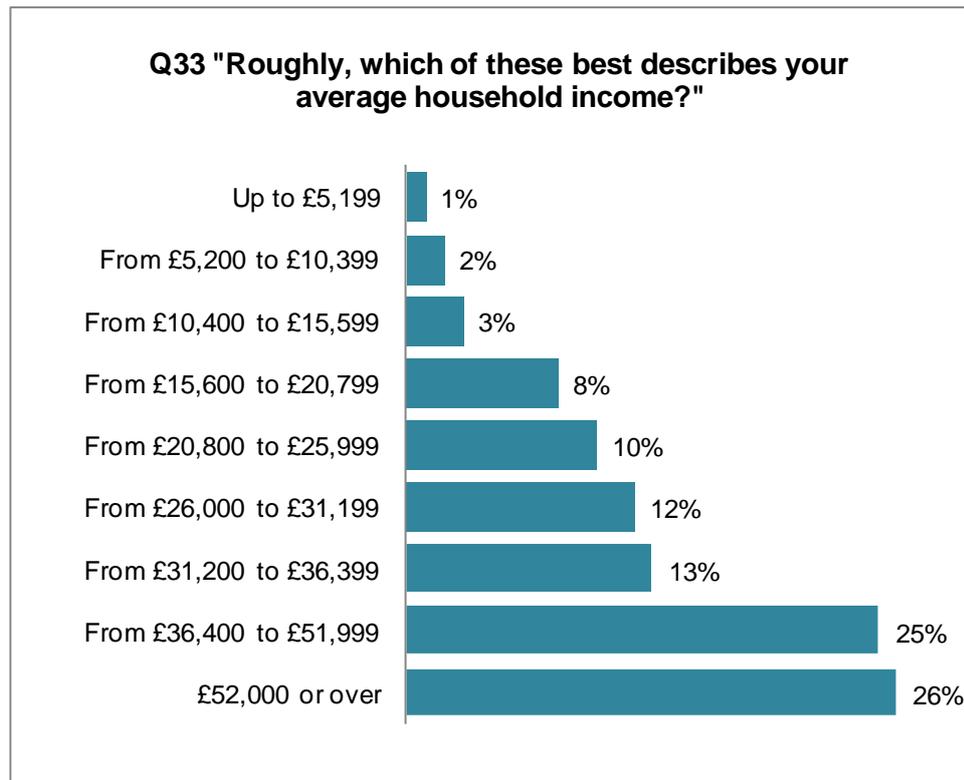
Overall, the majority of visitors fall into the C1 social class, and are more likely to be found at Pontneddfechan (63%), Aberdulais Falls (62%) and Margam Park (59%).

There are higher proportions of ABs at Afan Forest (17%) and Pontneddfechan (17%) compared to other locations.

Three in ten (30%) visitors at Afan Forest are C2, as are 28% at Glyncorrwg Ponds.

There is a higher proportion of DEs at Aberavon seafront (17%) compared to other locations, although there are 13% at Margam Park.

Household income



Base: 366 (those providing income information)

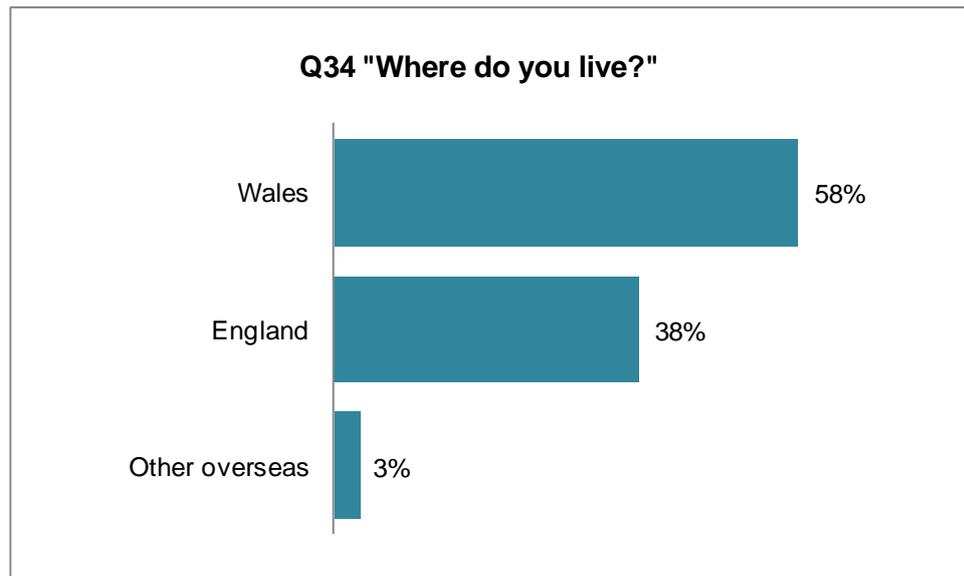
Visitors fall into higher income brackets

Around half (51%) of visitors in Neath Port Talbot have a household income of over £36,400

The proportions increase as income bands get higher.

As a high proportion (68%) do not like to disclose this information, it would not be reliable to look at any differences between locations.

Origin of visitors



Base: 1137

Welsh visitors holiday at home

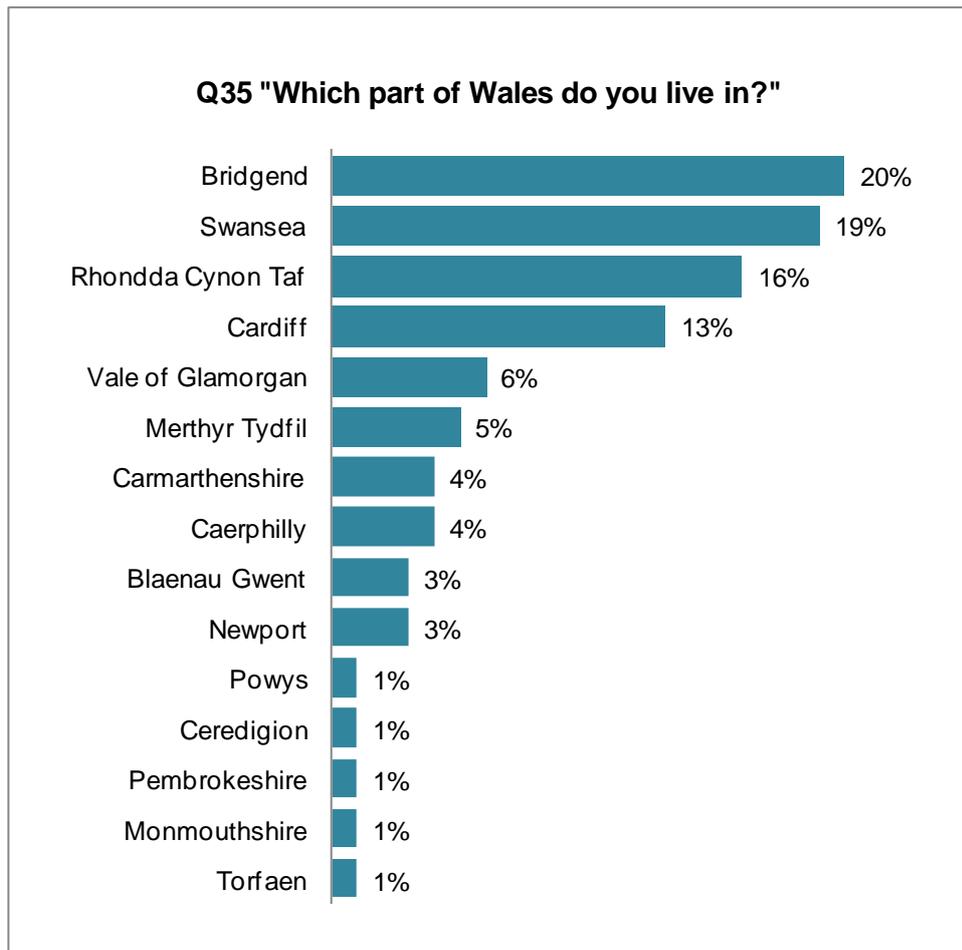
The majority (58%) of people visiting Neath Port Talbot live in Wales. But this proportion varies hugely by location.

The locations with the highest proportion of visitors from Wales are Aberavon seafront (89%) and Margam Park (83%).

Sizable proportions of other locations have visitors from England taking a trip there, including Aberdulais Falls (57%), Pontneddfechan (50%), Afan Forest (47%) and Glyncoirwg Ponds (46%).

Pontneddfechan has the highest proportion of overseas visitors (10%).

Regional breakdown – Wales



Base: 664

Neighbouring counties home to visitors

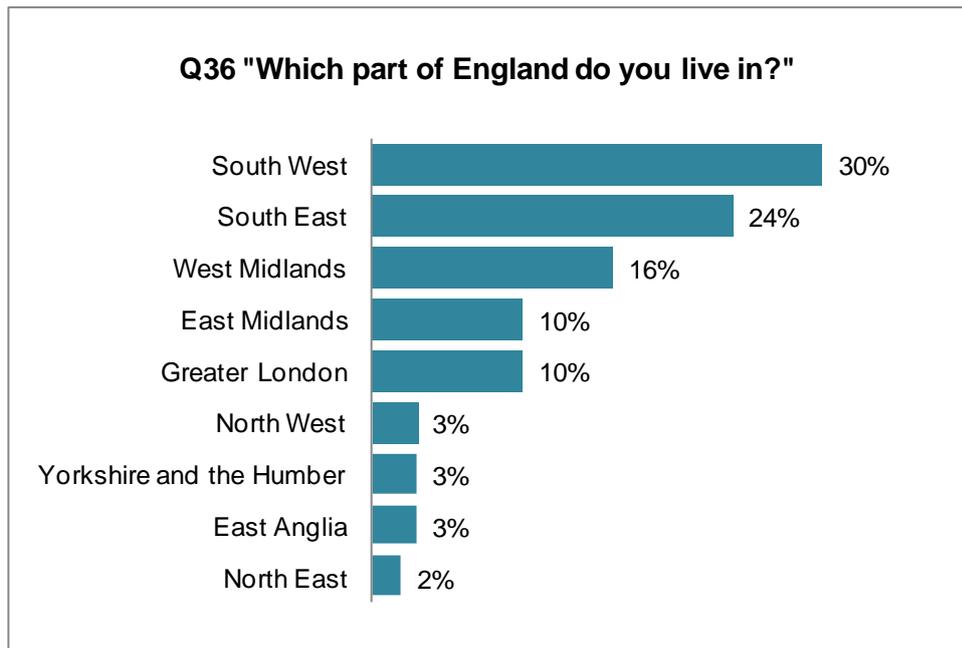
The majority of visitors come from counties that are geographically close to Neath Port Talbot.

Around a third (35%) of visitors to Aberdulais Falls are from Swansea and 27% of visitors to Margam Park are from Bridgend.

At Afan Forest, a quarter (24%) are also from Bridgend and the same proportion (24%) are from Cardiff.

A quarter (24%) of visitors at Aberavon seafront are from Bridgend, while 23% at Glyncorrwg Ponds and 20% at Pontneddfechan are from Rhondda Cynon Taf.

Regional breakdown – England



Base: 430

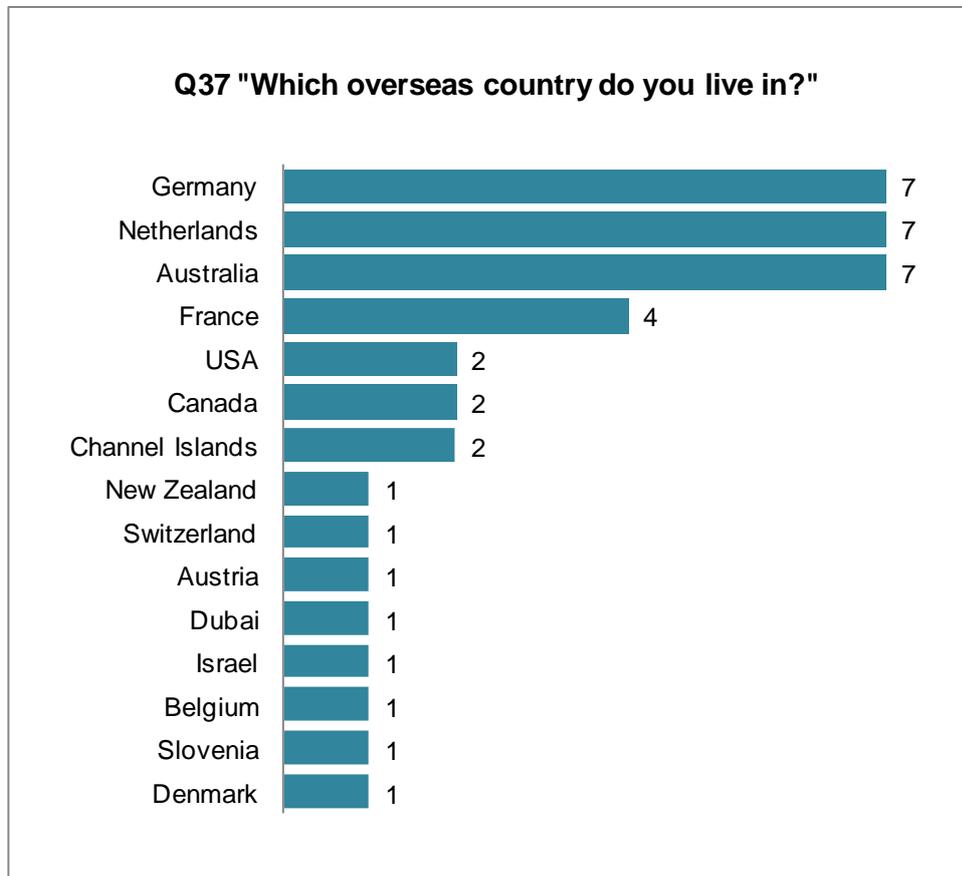
NPT is attractive to visitors from South England

Over half of visitors are from the south of England, including 30% from the South West and 24% from the South East.

Unsurprisingly, it tends to be the closer people live to Wales, the more likely they are to be a visitor in Neath Port Talbot, as shorter travel times can be desirable.

Country breakdown – overseas

Due to the small number of overseas visitors, the chart below shows actual numbers, rather than percentages.



Base: 39

Long flights for Australians

While it is not uncommon to see some Europeans holidaying in Neath Port Talbot, seven respondents flew half way across the world to visit, from Australia.

8. Spend

The below tables give a breakdown of visitors' group spend in Neath Port Talbot. It is important to note that each breakdown by location is calculated using a small base – particularly for visitors staying in NPT - so figures are less robust.

Total spend – all locations

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£137.02		£15.08
Food & drink	£99.87	£15.95	£25.35
Entertainment / entry to attractions	£7.24	£3.19	£3.65
Shopping (excluding groceries)	£12.46	£1.87	£3.05
Travel paid for in the region	£18.78	£2.45	£4.27
Total spend	£275.37	£23.46	£51.40
Base	126	1011	1137

Margam Park

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£92.00		£2.21
Food & drink	£62.00	£10.92	£12.16
Entertainment / entry to attractions	£8.00	£9.25	£9.22
Shopping (excluding groceries)	£16.00	£0.55	£0.92
Travel paid for in the region	£24.00	£0.52	£1.09
Total spend	£202.00	£21.23	£25.60
Base	5	203	208

Afan Forest

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£136.41		£32.27
Food & drink	£123.80	£15.36	£41.43
Entertainment / entry to attractions	£6.70	£0.83	£2.25
Shopping (excluding groceries)	£12.39	£1.91	£4.43
Travel paid for in the region	£17.52	£3.37	£6.77
Total spend	£296.82	£21.47	£87.15
Base	44	142	186

Glyncorrwg Ponds

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£97.76		£23.17
Food & drink	£73.24	£17.68	£30.85
Entertainment / entry to attractions	£1.46	£0.39	£0.64
Shopping (excluding groceries)	£13.17	£7.98	£9.21
Travel paid for in the region	£13.05	£2.09	£4.69
Total spend	£198.68	£28.14	£68.55
Base	41	132	173

Pontneddfechan

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£64.62		£3.78
Food & drink	£96.85	£19.17	£23.82
Entertainment / entry to attractions	£16.62	£0.09	£1.08
Shopping (excluding groceries)	£17.69	£0.05	£1.11
Travel paid for in the region	£40.00	£1.47	£3.78
Total spend	£235.77	£20.78	£33.58
Base	13	209	222

Aberdulais Falls

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£403.18		£24.78
Food & drink	£121.67	£15.00	£22.15
Entertainment / entry to attractions	£19.25	£5.83	£6.73
Shopping (excluding groceries)	£8.33	£1.72	£2.16
Travel paid for in the region	£28.33	£3.79	£5.44
Total spend	£580.77	£26.34	£61.25
Base	12	168	180

Please note, that one party interviewed at Aberdulais Falls spend £2,000 on their accommodation in Neath Port Talbot. Because of the low base, this significantly increases the overall figures for this location.

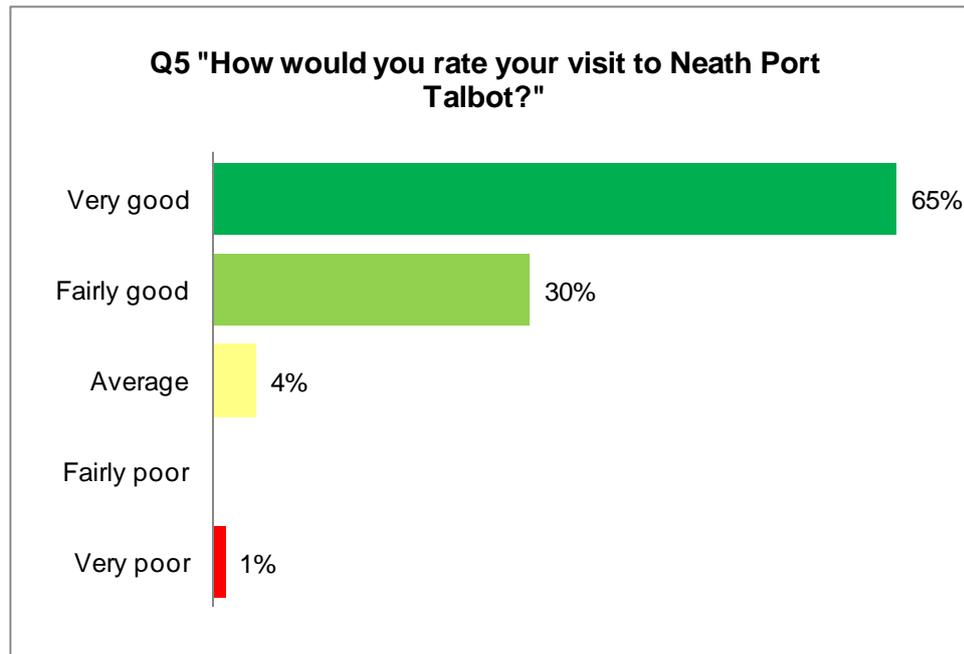
Aberavon seafront

Activity	Staying in NPT	Day visitors / Staying outside of NPT	All visitors
Accommodation (staying visitors in NPT)	£125.64		£8.23
Food & drink	£100.45	£18.25	£23.64
Entertainment / entry to attractions	£6.36	£1.08	£1.42
Shopping (excluding groceries)	£6.82	£0.90	£1.29
Travel paid for in the region	£7.27	£4.23	£4.43
Total spend	£246.55	£24.46	£39.00
Base	11	157	168

9. Follow Up Survey

A follow up survey was conducted with 119 visitors, to find out what they thought about Neath Port Talbot after they had gone home. The following section is dedicated to their responses.

Visit rating



Base: 119

NPT rates highly as a destination

The vast majority of visitors (95%) say their time in Neath Port Talbot was good, including 65% who rate it as 'very good'.

Naturally beautiful

In the follow up survey, respondents were asked: 'What was the best thing about your visit to Neath Port Talbot?' The open comments largely reflect the reasons they initially decided to visit the area, previously covered in this report.

One of the most frequently-mentioned things visitors enjoy is the natural beauty of the area, which includes Neath Port Talbot's coastline, forest and open spaces. For some, it's a great spot to get away from the hustle and bustle of everyday life and relax in unspoilt surroundings.

"The amount of open space"

“Getting out of the city”

“I was surprised because the beach was supposed to be lovely according to people’s recommendations - and it actually was”

“I like the woods and parks. I have a professional interest in the forest”

“I loved the countryside, it was so peaceful”

“The best thing for me was the space, you don’t feel crowded”

Included in Neath Port Talbot’s natural beauty is a series of waterfalls, which were a highlight of the area for some visitors.

“The footpath along the side of the river and the waterfalls were amazing”

“Definitely the waterfall. We could climb behind it and around and we listened to audio tracks on the way”

A walkers’ paradise

The beautiful and natural surroundings made for picturesque walks for some visitors – and their four-legged friends - who remembered the experience after their return home.

“The forest is great for walking the dog”

“There were lots of different walks, lovely place to visit”

“The actual nature walks and the pub at the end were a highlight for me”

A Mecca for mountain bikers

For those who like to jump on their mountain bikes, the biking experience and trails in Neath Port Talbot were what really stuck out as the best thing about their visit.

“The trail itself – mountain biking is great there”

“It’s a good place for mountain biking”

Things to work on

Visitors were asked: “Is there anything that could have made your visit to Neath Port Talbot more enjoyable?”

More than half (55%) said that there was nothing that could have improved their visit, while some said only better weather would have made their visit more enjoyable.

“A guaranteed sunny day. It was raining on the day”

Others would have liked more toilets, more parking, improved mountain bike trails and more places to eat and shop.

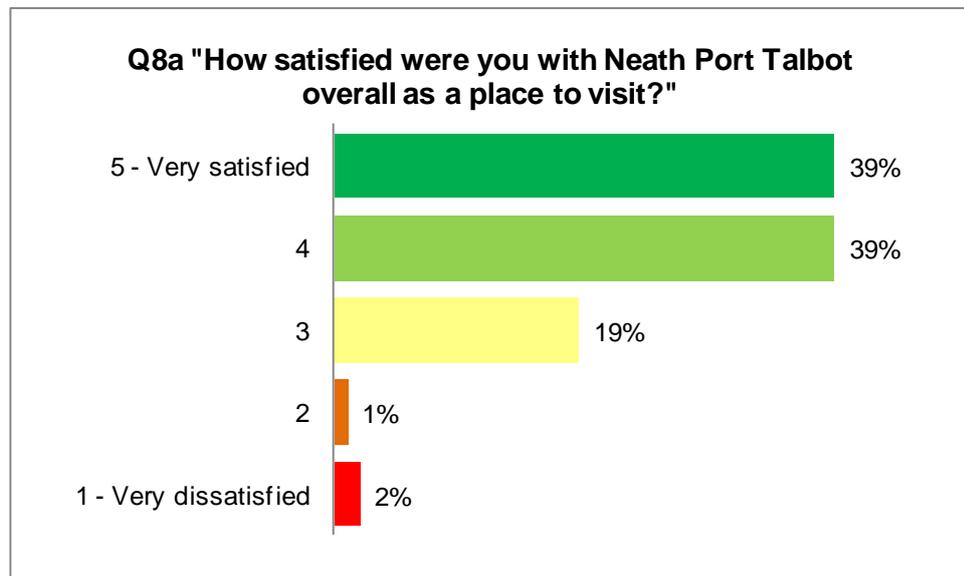
Some people would like areas to be updated or refurbished, to have improved their visit to Neath Port Talbot.

“I think that the children's area could be a bit refreshed”

“The baby facilities aren't as good as they needed to be”

“The mountain bike trails could do with a bit of maintenance”

Overall rating



Base: 113

Satisfied visitors, on the whole

Overall, the majority of visitors are either 'very satisfied' or 'fairly satisfied' with Neath Port Talbot as a place to visit.

"It was good. Everything was"

"It was a pleasant day out, I can't complain"

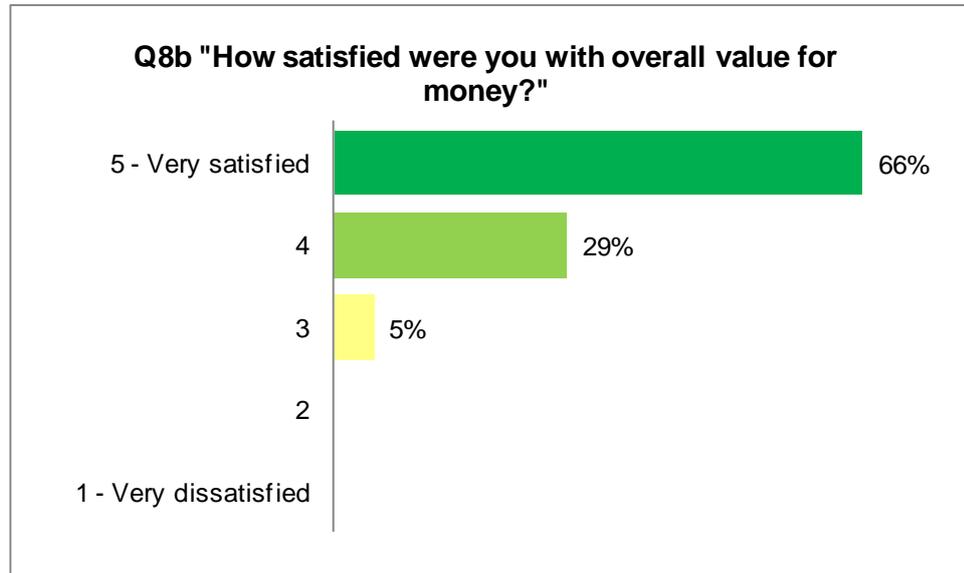
"Everything was great, although nothing stood out particularly"

Middle-of-the-road for some

One in five (19%) look back at their time in Neath Port Talbot without much satisfaction or dissatisfaction.

"It was nothing special, it was just a lovely afternoon"

Value for money



Base: 118

Neath Port Talbot is great value

Two thirds (66%) of visitors say that they are 'very satisfied' with the county's value for money, overall, and further 29% give it a 4 out of 5.

"The facilities and possibilities overall are amazing for such a cheap price"

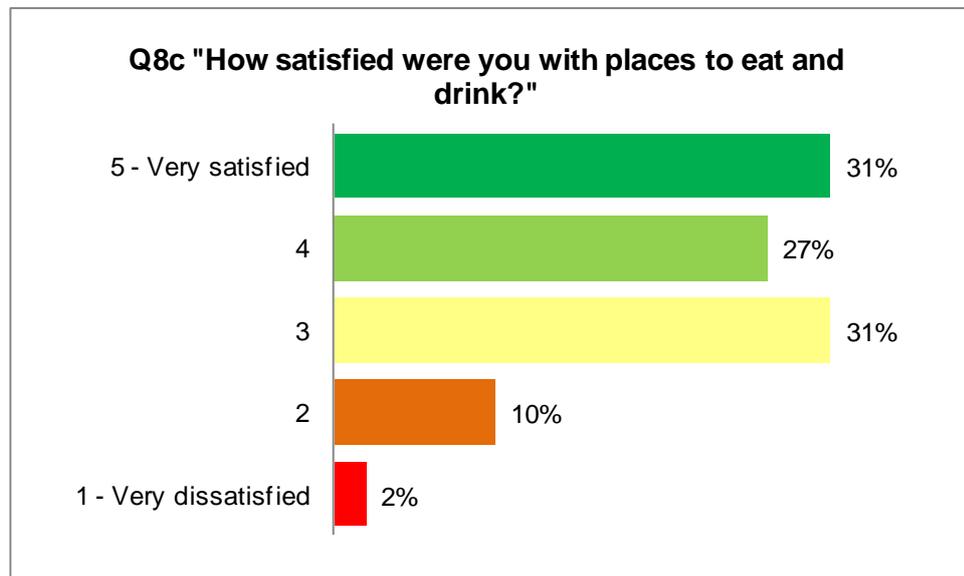
"I didn't have to pay for a thing"

"There are lots of free things to do"

With so many people visiting Neath Port Talbot to take part in outdoor activities and to enjoy the landscape, countryside and beach, the main reasons people visit are often at a low cost – if there is a cost at all.

As is evident from the 'spend' section of this report, visitors are not spending much money on their trip to Neath Port Talbot. This is an area that could be considered when looking at ways to capitalise on visitors' time in the area.

Places to eat and drink



Base: 94

Favourable leaning towards food and drink

Visitors enjoy tucking into tasty food during their visit to Neath Port Talbot, with a third (31%) saying they are very satisfied with the places that were available to eat and drink. Location, cleanliness, quality and friendliness of staff can all have an impact on satisfaction levels.

"The seafront and the food were my favourite things"

"Visiting the café was lovely"

"I always go to the cafe - we always love it there, it's nice and clean"

"The scenery and the quality of food and coffee was great"

Not all are satisfied

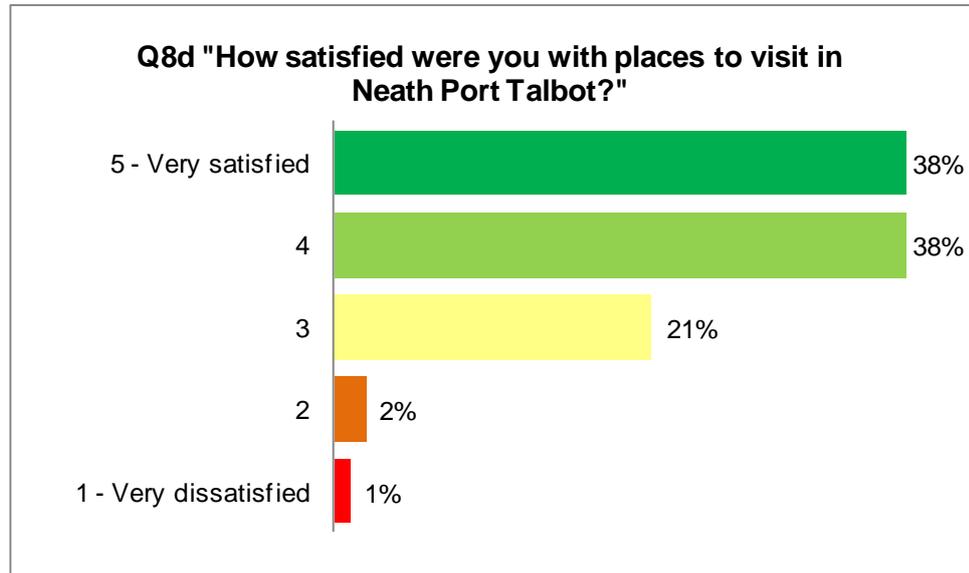
Three in ten (30%) give a rating of 3, suggesting a neutral response. A small proportion (12%) give a score of 1 or 2 out for 5 for 'places to eat and drink'. This may be because food venues were closed, had sold out of food, or because of a lack of variety.

"There could have been a better choice of restaurants"

"Unfortunately the pub had run out of food by the time we got there"

"The opening hours of the cafe could be longer, it closes at 4"

Places to visit



Base: 90

Plenty of variety

There is a lot to see and do according to most people who have visited Neath Port Talbot, with 76% of visitors giving 'places to visit' either a 4 or 5 out of 5.

"There are lots of things to do within a reasonable travel distance"

"It was a good day. The weather was good and there was a lot to see and do"

"The best thing was that there was a variety of things to do there"

Not only is there variety, but the quality of the places they visited are wrapped up in the ratings, which favour the county.

"The ponds were kept very well"

"Facilities at the venue were excellent"

"The layout of the National Trust Centre was great"

"The museum was very informative. It was a great experience overall"

Quality of natural environment



Base: 117

Natural environment score highly

The quality of Neath Port Talbot gets the highest satisfaction levels, compared to other things rated. Nearly seven in ten (68%) give the top score to the area's natural environment, with a further quarter (24%) giving a 4 out of 5.

"The beach and seafront were beautiful"

"It was great, very picturesque"

"The place we camped at was beautiful"

"I loved the lack of commercialisation around the waterfall"

Shopping



Base: 31

Few shop in NPT, with mixed results

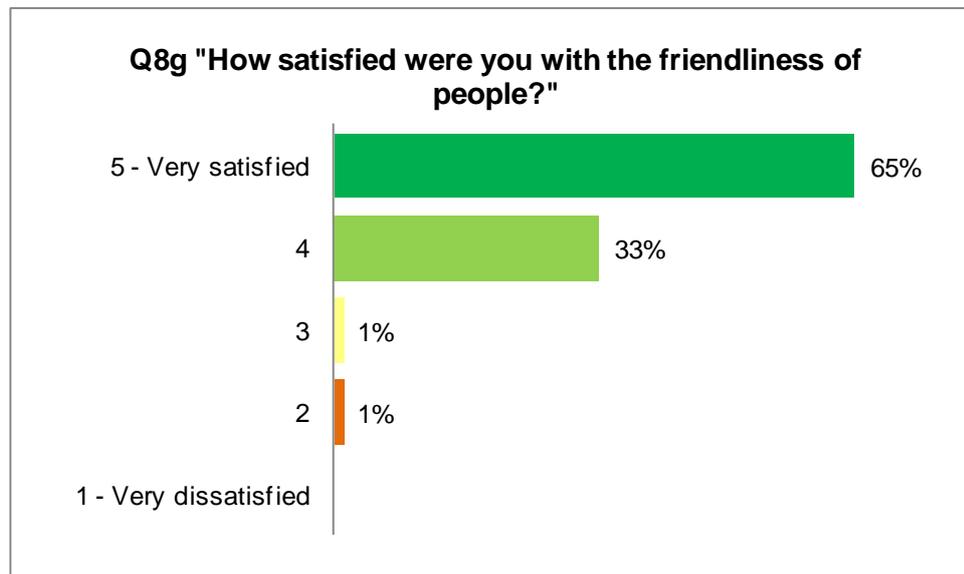
Neath Port Talbot is not a destination that many people head to when they want to shop. Out of the few that did, there are mixed satisfaction levels, with some saying they would like to have seen more shops – and a bigger variety of shops.

"It needed more shops"

"I'd have liked more shops, maybe in the car parks from local vendors"

It is important to note that this is based on a small number of people who included shopping in their trip, a third (32%) of which give a neutral rating of 3.

Friendliness of people



Base: 115

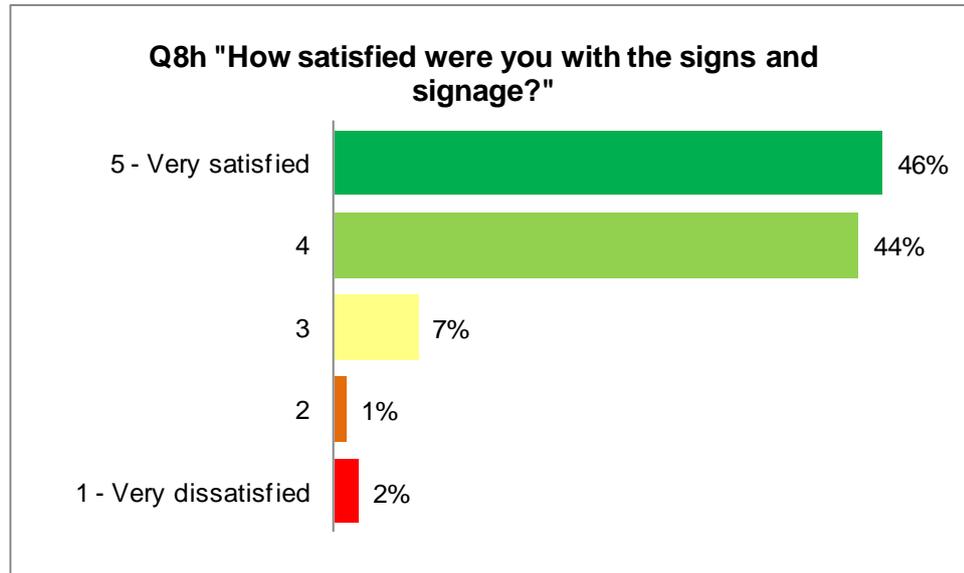
Receiving a warm welcome

Thinking back about their visit to Neath Port Talbot, two thirds (65%) say they were 'very satisfied' with the friendliness of the people they met. A further third (33%) gave friendliness a 4 out of 5.

"The scenery and friendly people are what I remember"

"Nice clean beach, good food and lovely people"

Signs and signage



Base: 112

The ease of getting around

Most visitors find it easy enough to find what they are looking for in Neath Port Talbot, thanks to the signs and signage in the county.

Nearly half (46%) give signage a full 5 out of 5, and a further 44% rate it 4 out of 5.

But not everyone agreed – some would like to see more signage or cleaner signs.

"The signs along the way could be cleaner, we missed them sometimes"

"We had trouble finding the place, the signage could be better"