FINAL REPORT

Brecon Beacons Visitor Survey

Brecon Beacons Marketing and Coordination Group

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1. Executive Summary

Online survey background

1.1 The survey is based on the results of 1201 responses gathered through three online surveys containing the same content but aimed at different audiences. The survey has been live since October 2013 the results cover responses up to the end of September 2014.

1.2 Responses were obtained through three routes - a survey of visitors from a selection of accommodation providers using an email invite, visitors who stayed in Brecon Beacons Holiday Cottages and an open survey which is available to all and hosted at www.breconbeaconssurvey.co.uk.

1.3 At the time of completing the survey, almost all respondents (93%) had visited the Brecon Beacons within the previous 12 months. 83% were staying overnight in the area, 8% were staying outside of the Brecon Beacons and 9% travelled from home for the day.

Mainly leisure visits

1.4 The majority of visitors were visiting for leisure purposes (94%), 11% were visiting friends or relatives, 1% on business and 4% for some other reason.

Mostly self-catering accommodation users

1.5 Self-catering accommodation is most popular amongst respondents (87%) reflecting the source of many of the survey responses. Other types of accommodation used include caravan/campsites (6%), B&B or guesthouses (4%), hotels (2%) and hostels/bunkhouses (2%).

1.6 Overnight visitors stayed for an average of 5.8 nights

Previous and new visitors

1.7 Over two thirds (68%) have been to the area before; rising to 93% of day visitors. 32% are new to the area. 80% of day visitors took a trip to the Brecon Beacons earlier in the year compared to 22% of staying visitors with an additional 34% visiting the previous year. 24% of all visitors last came to the area over three years ago.

Maps and online visitor information important ahead of staying visits

1.8 The use of visitor information to **plan a trip** is more common amongst overnight rather than day visitors and 17% of visitors did not use any information resources and this rises to 33% for day visitors.

1.9 Where information resources are used ahead of a visit, the most popular are maps (42%). Online resources are also popular and the National Park website is the most common source of information to plan a trip (39%) and is also used to some extent by day visitors (25%).

1.10 Others use the Brecon Beacons Tourism website (22%), ‘other websites’ (18%), and the Visit Wales website (18%) – but all of these more often by overnight visitors.

1.11 Offline resources are still used but to a lesser extent prior to visiting. Guidebooks are used by 18%, TICs by 11% but mainly by staying visitors, and the some use the National Park Visitor Guide (10%).

Offline visitor information used during staying visits

1.12 Maps are again a popular resource (49%) whilst in the area but online resources are used less **during** a trip. Where they are used, the most popular sources of visitor information are leaflets (42%), TICs (33%) but less so amongst day visitors (10%) and guidebooks (25%). New visitors tend to use these resources more often in general.

1.13 The National Park website is used during the trip by around one in seven visitors (14%) irrespective of whether for day or overnight trips. A fifth of new visitors (20%) and overseas visitors (21%) used the site during their visit.

1.14 Where leaflets are used, they were generally picked up from accommodation (80%), TICs (47%) or visitor attractions (25%).

Destination website used to decide what to do and find accommodation

1.15 Where the Brecon Beacons destination website was used, 29% used it to find accommodation and 77% said it helped them to plan their activities.

1.16 Around half of those using the website could not think of any improvements. Those that made suggestions would like to see further developments on visitor information content, more walking information and maps and postcode information to be included for attractions to aid navigation. A few mentioned issues with slow image downloads and one suggested links didn’t work properly.

Landscape & scenery and tranquillity are key influences

1.17 A range of factors influence the decision to visit the area and the most influential of these are scenery/landscape, peace and quiet and a previous visit.

Visiting towns and villages, walking, and eating out are key activities

1.18 Activities undertaken by visitors include visiting towns and villages (68%), low level walking/rambling (61%), visiting restaurants/pubs (56%), hill walking/hiking (55%), visiting attractions (42%) and shopping (40%). Families with children have higher levels of interest in visiting attractions (51%).

1.19 Day visitors have slightly different preferences with the most popular activities being hill walking/hiking (59%), low level walking/rambling (35%), visiting towns/villages (30%). There is less interest in visiting attractions (20%) and shopping (25%).

1.20 The most popular towns and villages to visit include Brecon (77%), Abergavenny (52%) and Crickhowell (50%).

Most popular attractions and places to visit

1.21 The most popular attractions or popular sites visited include the Mountain Centre (26%), Brecon Cathedral (21%) and Brecon Mountain Railway (16%).

1.22 There is a greater leaning towards visiting ‘natural’ sites, the most popular of which are the Monmouthshire & Brecon Canal (41%), the Waterfalls area (37%), Pen Y Fan (33%), Talybont Reservoir (26%) and Llangorse Lake (20%).

Customer service expectations met but exceeded for accommodation

1.23 Customer service expectations are either met or exceeded in most aspects of visits but accommodation receives the best ratings with 50% of visitors indicating that their expectations were exceeded compared with 30% for attractions, 27% for restaurants/cafes/pubs, 24% for TICs and 14% for shops.

1.24 At the other end of the scale, whilst not widespread, some visitors found that the level of customer service fell short of their expectations in restaurants/cafes and pubs (6%), shops (5%) and accommodation (5%).

Quality expectations met

1.25 In terms of the **quality** of goods and services, the results were similar with expectations exceeded in accommodation (50%) but less so for attractions (28%), restaurants/cafes/pubs (25%), TICs (22%) and shops (12%).

1.26 As before, disappointment with the quality of goods and services is relatively low but nevertheless still present for restaurants/cafes/pubs (7%), accommodation (7%), shops (6%), TICs (3%) and attractions (1%).

Overall ratings positive

1.27 **Overall ratings** of quality and customer service combined are most positive for accommodation and attractions which received 'excellent' or 'good' ratings from more than 94% of visitors compared with restaurants/cafes/pubs (88%), TICs (90%) and shops (83%).

1.28 Overall, the enjoyment amongst visitors 'very good' - 79% of visitors said it was 'very good' and 19% that it was 'good'. The majority of visitors (79%) are 'very likely' to recommend the area with a further 19% 'likely' to do so.

Visitor profile

1.29 A range of visitor group types responded to the survey. Two fifths were couples (44%) and a third were families with children (33%). The remainder consisted of friends (13%), families without children (4%), lone visitors (4%), tour groups/societies or other visitor groups.

1.30 The average party size was 3.4 people and party size ranged from 1 to 36 people. The average party size of overnight visitors is the same but is slightly lower for day visitors (3.2 people). Families with children have an average group size of 4.9 people.

1.31 Respondent age groups vary widely although those aged 55+ make up two fifths of overnight visitors (43%) and a third of day visitors (34%). Half of overnight visitor respondents (48%) are 35-54 rising to 52% for day visitors.

1.32 A high proportion of overnight visitors (82%) are from England but the majority of day visitors (75%) are from Wales. English overnight visitors come from the South East (26%), Midlands (16%), South West (15%), London (11%) and East Anglia (8%).

1.33 8% of visitors come from overseas and the most common countries of origin are the Netherlands (39%), Belgium (9%), USA (8%), Germany (7%) and Australia/New Zealand (7%).

Non visitor feedback

1.34 Non-visitors have taken holidays or short breaks to alternative destinations including Europe (37%), Devon & Cornwall (29%), Wales (21%), Lake District/Cumbria (15%), the South Coast (12%) and London (12%).

1.35 28% of non-visitors say that they intend to visit the Brecon Beacons but have not yet done so, and a similar proportion have not considered the area (26%). Others comment that they had already booked a trip elsewhere (26%) or that they didn't have time to visit (15%).

1.36 42% of those who have not yet visited said that they definitely intend to in the next 12 months with a further 46% suggesting that they might do.

2. Survey Background and Method

Background and Method

2.1 This Brecon Beacons visitor survey has been live since October 2013 the results cover responses up to the end of September 2014. According to National Park data from October 2014, the Brecon Beacons has 4.15 million visitors per year and 5 million visitor days per year.

2.2 The survey aims to help BBMCG to understand:

- Visitor profile
- Use of visitor information, particularly the National Park website
- Activities and behaviour
- Customer expectations, satisfaction and likelihood of recommending
- Most enjoyable aspect of visit
- How the visitor experience can be improved

2.3 The report is based on the results of 1201 responses gathered through the same online questionnaires albeit from different sources.

2.4 Responses were obtained through three routes - a survey of visitors from a selection of accommodation providers using an email invite, visitors who stayed in Brecon Beacons Holiday Cottages and an open survey which is available to all and hosted at www.breconbeaconssurvey.co.uk. A quarterly free prize draw is offered as an incentive to take part in the survey.

Survey	Method	Number of responses	Overnight (%)	Day (%)
Main	**Invitation email** sent to database of contacts collated by BBT using email addresses collected via postcards, accommodation providers	56	100%	-
Brecon Beacons Holiday Cottages	**Link** sent as part of post-visit communications to customers renting accommodation from BBHC	926	99%	1%
Open survey	www.breconbeaconssurvey.co.uk and promoted via social media	219	50%	50%
	Total	**1201***	**91%**	**9%**

*includes 84 non-visitor responses

2.5 A proportion of visitors will have been to the area more than once before, sometimes within the same year. Respondents were asked to base their responses on their most recent visit. Duplicate responses were removed from the data set.

Day and Overnight Visitor Sample

2.6 The volume of data obtained makes the results very robust and provides a rich sources of information. However, whilst progress has been made in obtaining the views of a good number of day visitors (amounting to 97 responses) the proportion of day visitor interviews is relatively low compared to the number of overnight visitors (1020 responses).

2.7 Due to the relatively small size of the day visitor respondent group, analysis as this level is indicative rather than statistically robust. Under each chart, the number of responses by type of visit is shown according to whether visitors were staying overnight or visiting for the day.

Analysis and data presentation

2.8 The data provided within the report compares the responses from a number of groups of visitors e.g. day or overnight visitor, type of group, location, visit history and so on. Comments are made throughout the report to illustrate any significant differences.

2.9 The data for the 2013-14 survey has been compared to the previous 2012-13 survey. For ease of reference, data from both the previous and current surveys has been provided in the tables below the charts. . It should be noted that the 2012-13 survey covered a period of August 2012 to October 2013. The questionnaire has been amended between the two waves of the survey so comparative data is provided where possible Following statistical significance testing, comments and blue highlights on the tables illustrate any trends in the responses. Please note that not all increases or decreases in the findings are at a level that is considered to be statistically significant.

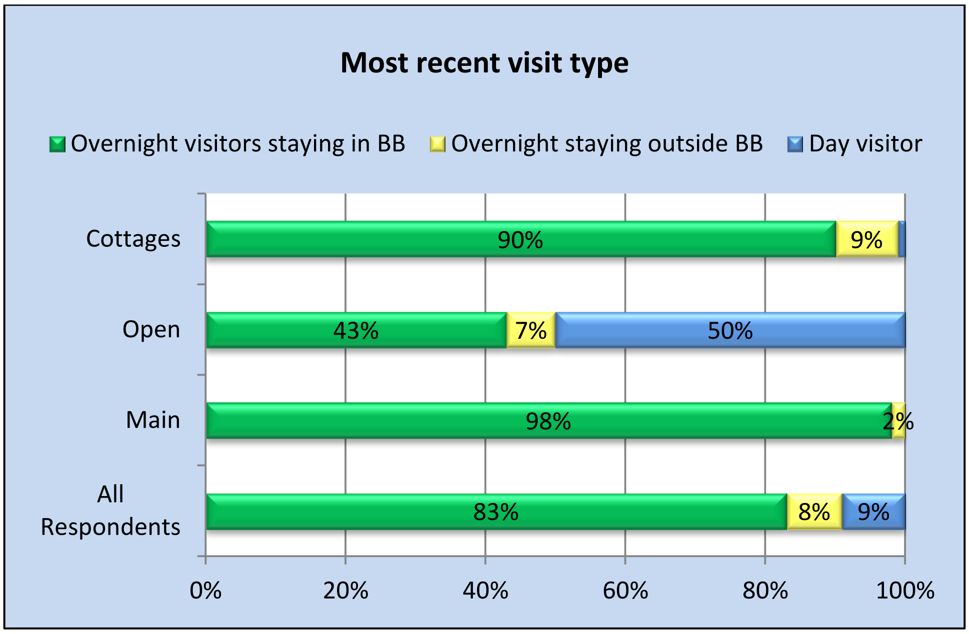
2.10 Some questions allowed more than one response and in these circumstances percentages will not add up to 100%. In other cases, percentages will not total 100% due to rounding.

3. Survey Findings

3.1 This survey mainly focuses on visitor feedback as at the time of completing the questionnaire 93% of those responding had visited the Brecon Beacons sometime within the previous 12 months compared with 94% in 2012-13.

3.2 Where survey respondents had not visited the areas within the last 12 months, they were asked some perceptions and profiling questions and the response to these can be found in Section 4.

Overnight and day visitor feedback



Base: 1117 Visitor Respondents (1020 Overnight, 97 Day)

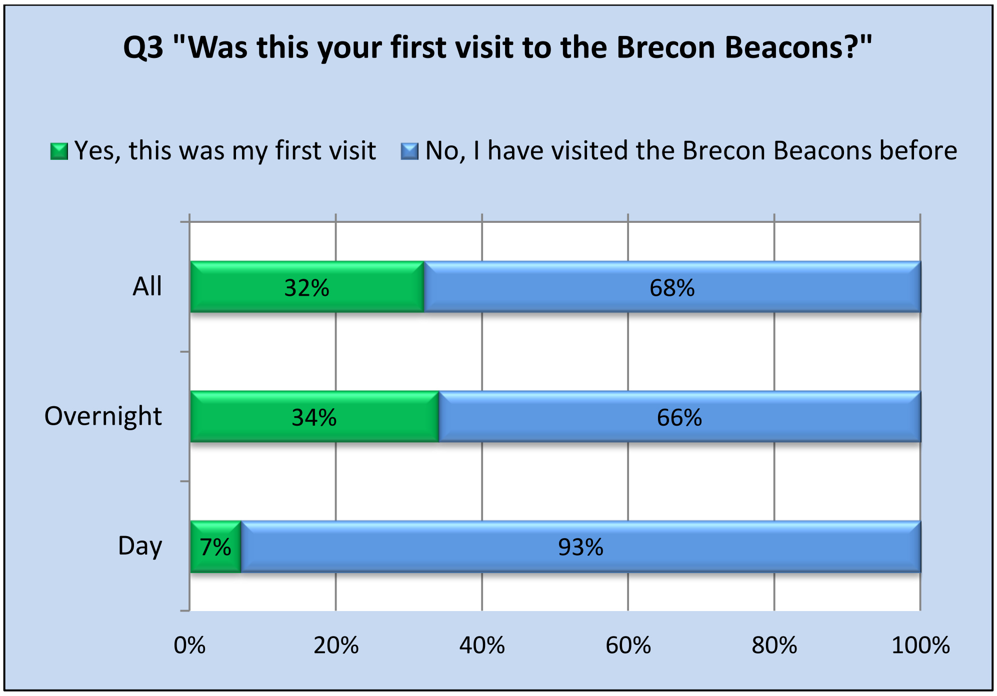
3.3 83% of visitors were staying overnight in the Brecon Beacons, 8% were staying outside of the area and 9% came from home for the day.

3.4 During this year's survey, the 'Open' survey link hosted at www.breconbeaconsurvey.co.uk was heavily promoted on websites, through twitter and other social media. It was hoped that through this link more day visitors to the area could be reached and invited to give feedback. Half of those responding through this link were day visitors, which is an increase on last year's 41% and shows some improvement. In total there were 97 day visitor respondents to the survey.

3.5 Overall, more respondents in this year's survey were staying in the area, up from 80% to 83% and 9% were day visitors compared to 8% in 2012-13.

'Which of the following best describes your visit…?'	2013-14	2012-13
Overnight visitors **staying in** Brecon Beacons	83%	80%
Overnight staying **outside** BB	8%	12%
Day visitor	9%	8%

A third are new staying visitors



Base: 1107 Visitor Respondents (1010 Overnight, 97 Day)

3.6 Visit history is mixed amongst overnight visitors, with is a strong pattern of repeat visits to the area (66%) but it is promising to see that a third of overnight visitors are new to the area and on their first visit (34%).

3.7 Day visitors are much more likely to have visited previously (93%) whilst just under one in ten (7%) were visiting for the first time.

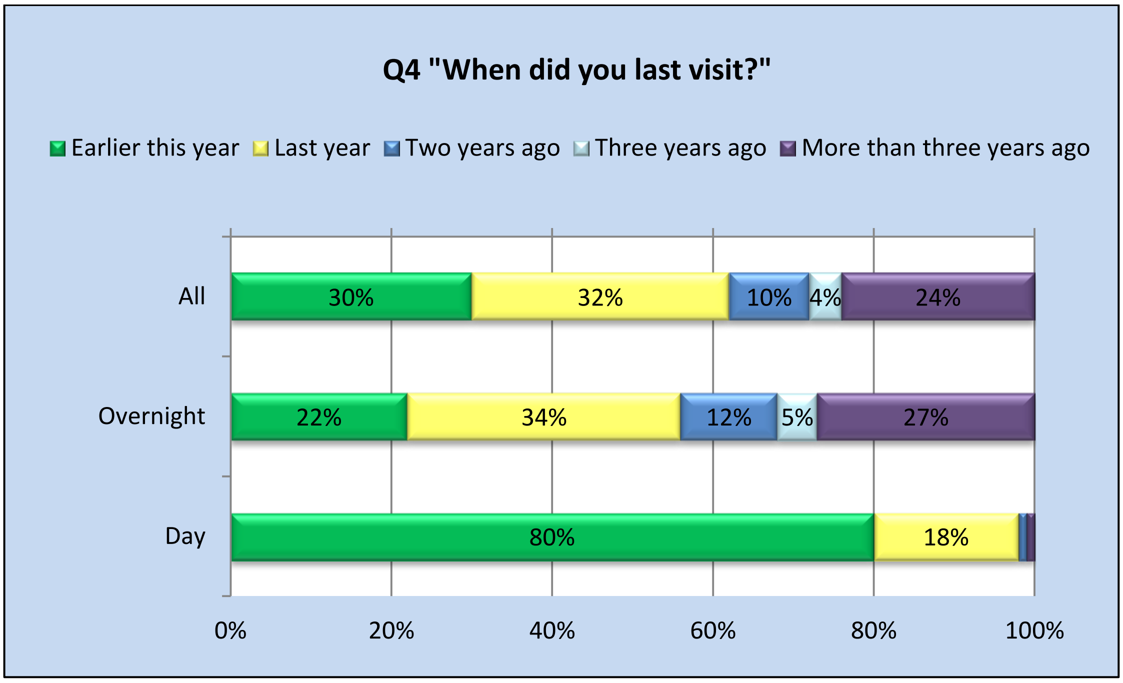
3.8 New visits to the area are highest amongst couples (36%) and families with children (32%) compared to less than a fifth of those visiting alone.

3.9 Comparing with a similar question in the previous survey, there is a slightly higher proportion of first time visitors amongst this year's respondents rising from 28% to 32%.

'Was this your first visit to the Brecon Beacons?'	2013-14	2012-13*
No, I have visited the Brecon Beacons before	68%	72%
Yes, this was my first visit	32%	28%

*(Adapted from 2012-13 question: 'Had you visited the Brecon Beacons previously?')

Last visits often within the last year



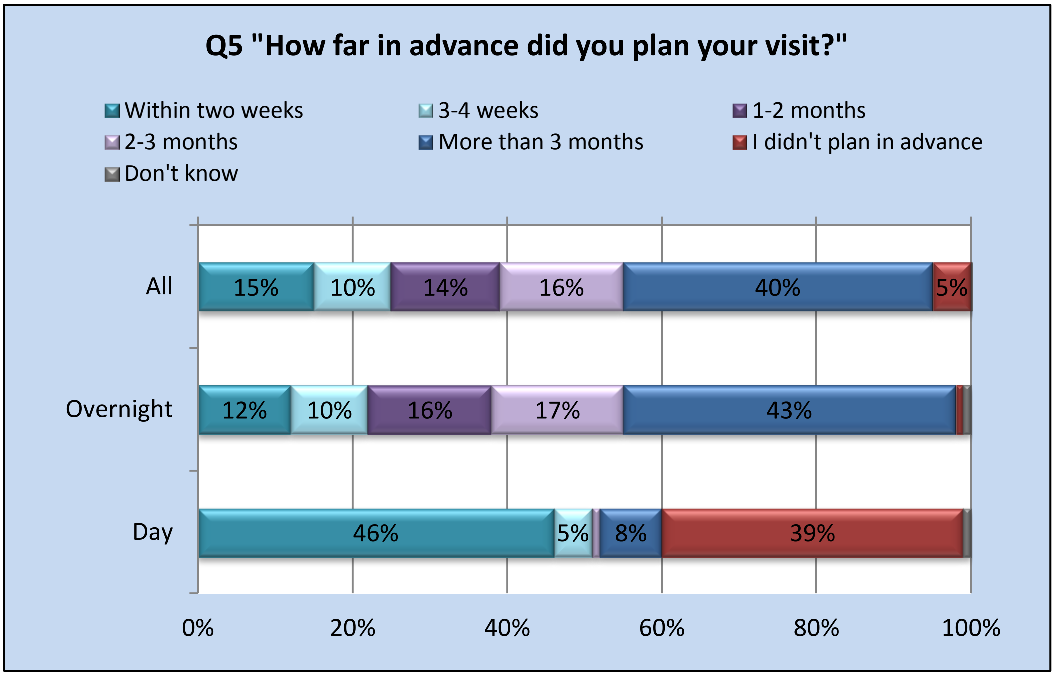
Base: 642 Previous Visitors (556 Overnight, 86 Day)

3.10 Day visitors are most likely to have visited earlier in the year (80%) compared to a fifth of overnight visitors (22%). A further third (34%) of overnight visitors were last in the area last year.

3.11 Just over a quarter of overnight visitors (27%) last visited more than three years ago and would be considered 'lapsed visitors'.

3.12 There is no comparative data for this question due to changes in the questionnaire.

Advanced planning patterns are mixed



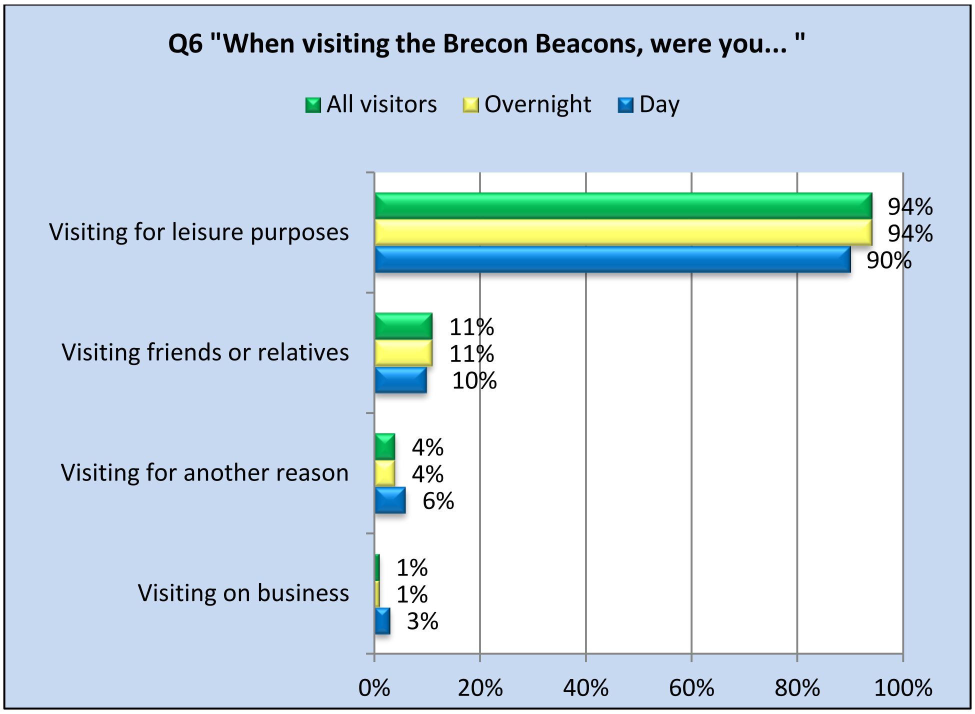
Base: 974 Visitor Respondents (880 Overnight, 94 Day)

3.13 Around two fifths of day visitors (39%) did not plan their trip in advance and as most of these are from Wales, this would appear to allow day visitors to make a trip to the area on the spur of the moment.

3.14 By almost all overnight visits are planned in advance to some degree. Just over a fifth (22%) were planned within a month of the visit whilst over two fifths (43%) were planned more than three months in advance.

3.15 There is no comparative data for this question due to changes in the questionnaire.

Mainly leisure visitors



Base: 1108 Visitor Respondents (1011 Overnight, 97 Day)

3.16 Respondents were able to give more than one response to this question.

3.17 Most visitors came for leisure purposes (94%), 11% were visiting friends or relatives, 1% on business and 4% for another reason. There is little variation amongst day or overnight visitors.

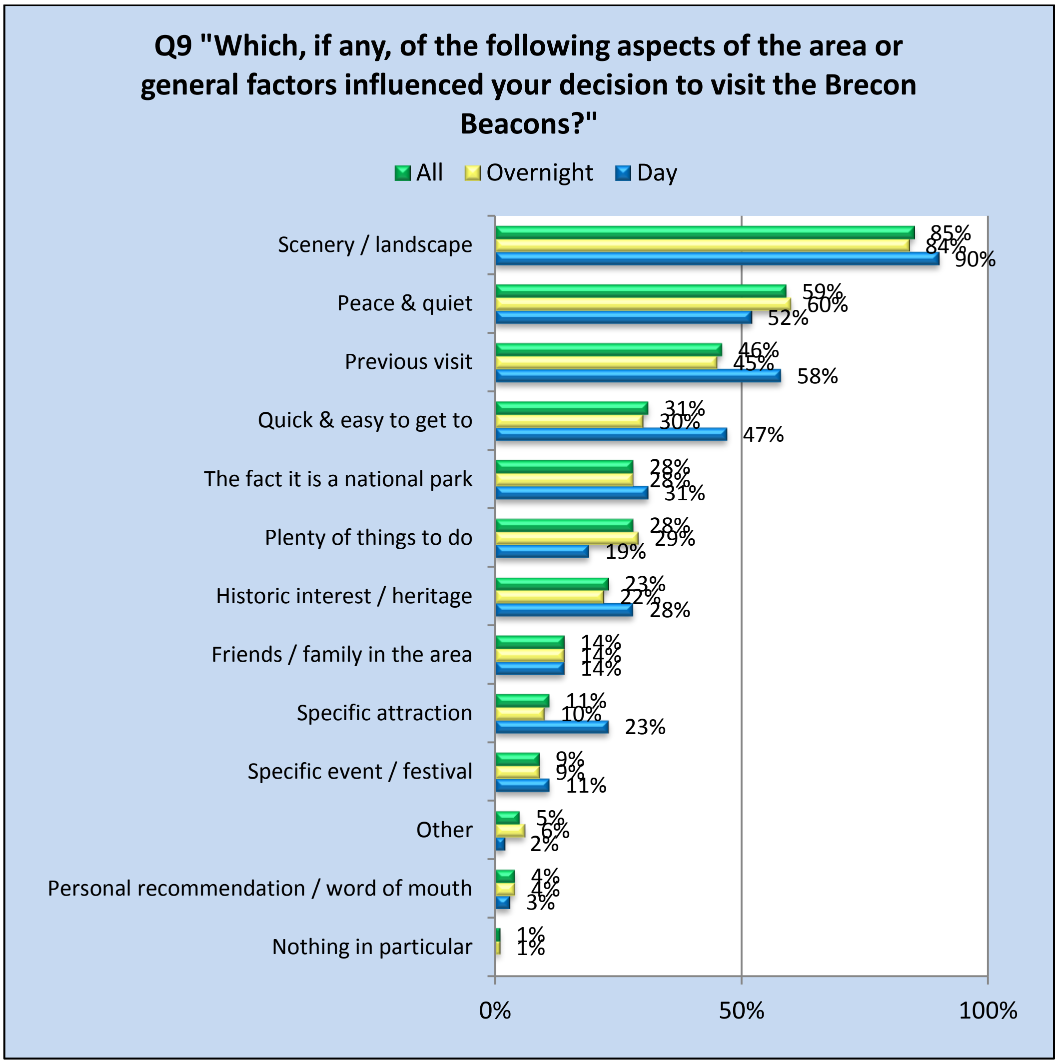
3.18 Visits to friends and relatives are highest amongst families with children (13%) and lone visitors (14%) compared to 11% overall. Around 15% of previous visitors were visiting friends or relatives but this was much less common amongst new visitors (5%) suggesting that they have little 'connection' to the area.

3.19 Business visits are also highest amongst lone visitors (5%) compared to 1% overall.

3.20 There is no significant change in the type of visitor when comparing with the previous survey:

'When visiting the Brecon Beacons, were you... '	2013-14	2012-13
Visiting for leisure purposes	94%	94%
Visiting friends or relatives	11%	10%
Visiting for another reason	4%	4%
Visiting on business	1%	1%

What influences the decision to visit?



Base: 1110 Visitor Respondents (1013 Overnight, 97 Day)

3.21 Typically, more than one factor will influence the decision to visit a destination. Respondents were asked to list one or more aspects of the area which had an influence on their decision to visit the Brecon Beacons.

3.22 The pattern is similar amongst day and overnight visitors in that 'scenery & landscape' is the mentioned most frequently (85%) but there are some variations on other factors.

3.23 Almost half of day visitors (47%) took a trip because the area is 'quick and easy to get to', but the convenience is less influential amongst overnight visitors (30%). Specific attractions influenced just under a quarter of day visitors (23%) compared with 10% of overnight visitors.

3.24 Previous visits influence almost six in the (58%) day visitors to take a trip compared to 45% of overnight visitors. Two thirds (67%) of those who have visited before, irrespective of the type of visit, said that a previous visit influenced their decision.

3.25 Personal recommendations are mentioned by 4% of visitors as a motivating factor but amongst new visitors, this is more than double (9%) pointing to the importance of advocacy in the decision making process.

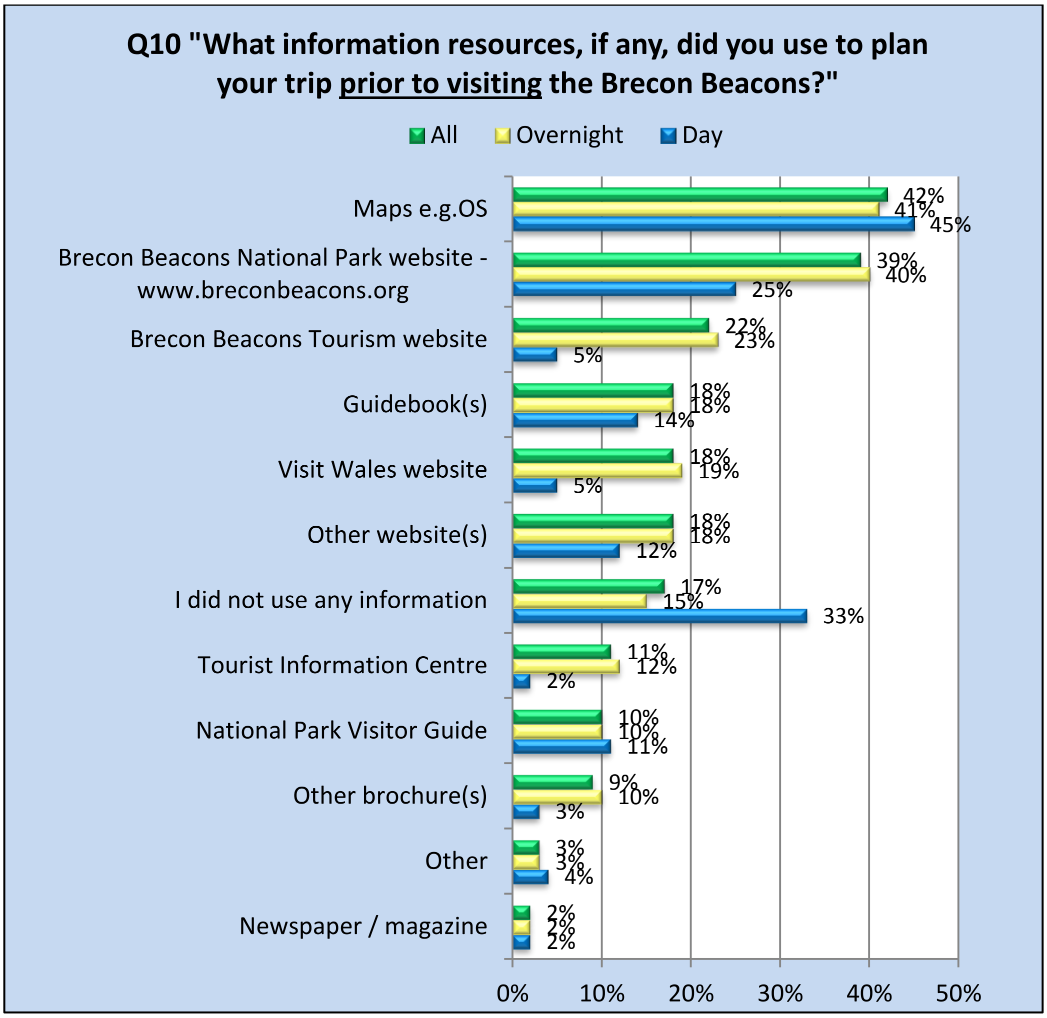
3.26 One in three new visitors (33%) highlight national park status as a key factor in their decision to visit compared to 25% of those who have visited before.

3.27 The factors influencing visits to the Brecon Beacons are similar between the two surveys although there are some statistically significant changes which are highlighted below.

3.28 National Park status appears to be more influential this year (28%) compared to last (24%) whilst other highlighted factors such as specific attractions, personal recommendations and ease of reaching the area were slightly less influential this year:

'Which, if any, of the following aspects of the area or general factors influenced your decision to visit the Brecon Beacons?'	**2013-14**	**2012-13**
Scenery / landscape	85%	86%
Peace & quiet	59%	62%
Previous visit	46%	47%
Quick & easy to get to	31%	36%
Plenty of things to do	28%	31%
The fact it is a national park	28%	24%
Historic interest / heritage	23%	24%
Friends / family in the area	14%	13%
Specific attraction	11%	15%
Specific event / festival	9%	8%
Other	5%	5%
Personal recommendation / word of mouth	4%	7%
Nothing in particular	1%	1%

Maps and online visitor information popular before visiting



Base: 1095 Visitor Respondents (1000 Overnight, 95 Day)

3.29 Visitor information to plan a trip is typically used more by staying visitors than day visitors. However, one in six visitors do not use information to plan a trip (17%), particularly day visitors (33%).

3.30 The most popular resources are maps and online information. Two fifths of overnight visitors (42%) and 45% of day visitors use maps to plan their trip.

3.31 The National Park website is the most common online resource (39%) and is also used by a quarter of day visitors (25%). Others use the Brecon Beacons Tourism website (22%), 'other websites' (18%), and the Visit Wales website (18%) – but all of these more often by overnight visitors.

3.32 Offline resources are still used but to a lesser extent prior to visiting. Guidebooks are used by around one in five visitors (18%). Other offline resources include TICs (11%), used mostly by staying visitors, and the National Park Visitor Guide (10%).

3.33 Compared to the previous survey, there are some statistically significant changes in the types of information resources being used to plan trips before visiting the area. Due to changes in the questionnaire and the withdrawal of some materials, some resources are no longer included whilst Maps has been added as a new category in this year's survey.

3.34 There has been a slight fall in the proportion of visitors using the BBT website to plan their trip from 26% down to 22%. Whilst there is a slight increase in those using the Brecon Beacons National Park website, this is not statistically significant.

3.35 Far fewer respondents indicated that they used other websites – down almost half from 33% to 18%. There is also a fall of almost a third in those using a TIC – down to 11% from 15%.

What information resources, if any, did you use to plan your trip <u>prior to</u> visiting the Brecon Beacons?'	**2013-14**	**2012-13**
Maps e.g.OS **added in 2013-14*	42%	-
Brecon Beacons National Park website - www.breconbeacons.org	39%	36%
Brecon Beacons Tourism website	22%	26%
Other website(s)	18%	33%
Visit Wales website	18%	20%
Guidebook(s)	18%	18%
I did not use any information	17%	19%
Tourist Information Centre	11%	15%
National Park Visitor Guide	10%	9%
Other brochure(s)	9%	7%
Other	3%	10%
Newspaper / magazine	2%	3%
Mid Wales and Brecon Beacons brochure **removed after 2012-13*	-	9%
Advertising leaflet *removed after 2012-13	-	1%

Offline visitor information most popular <u>during</u> visits

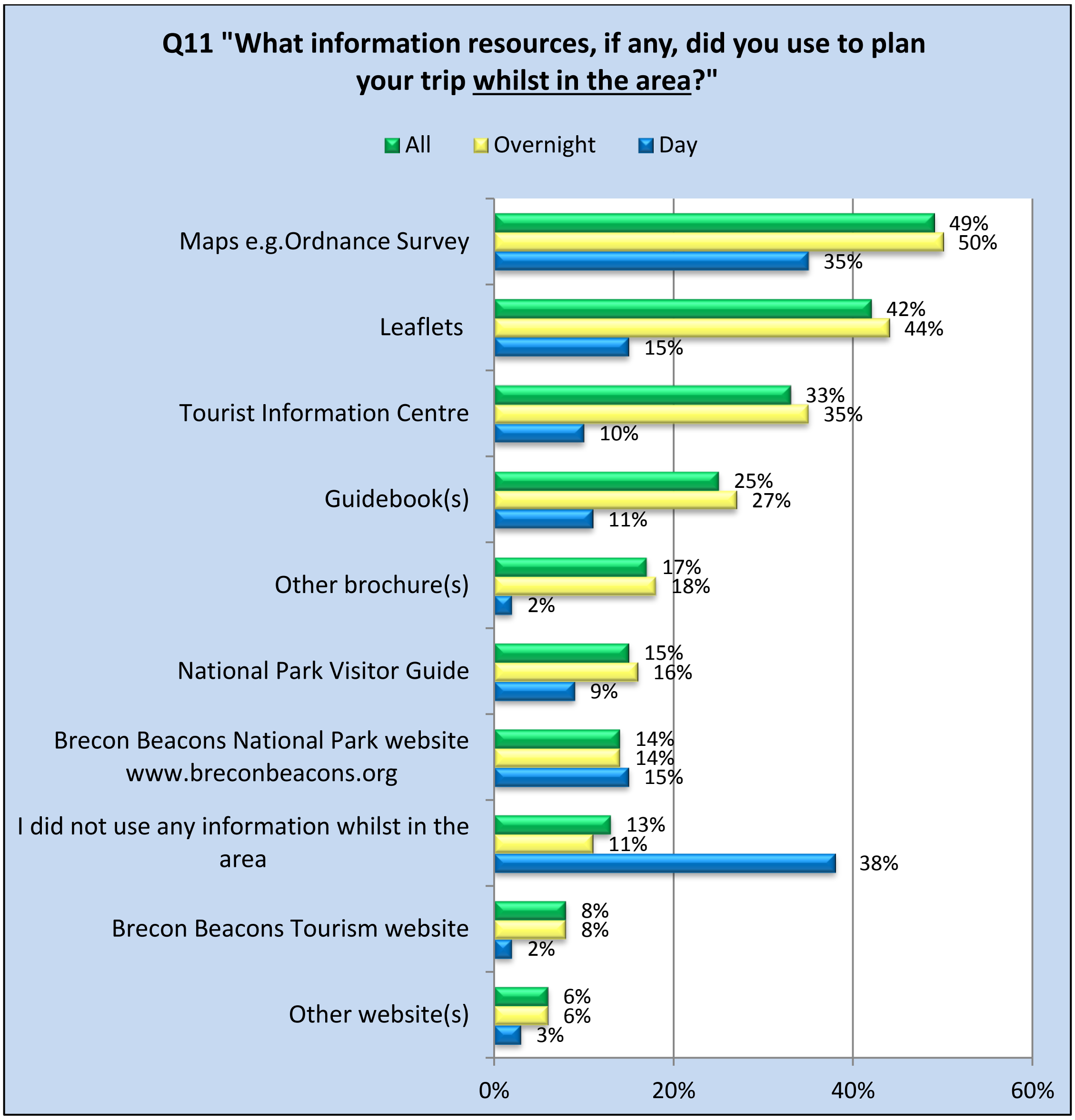


Chart excludes sources named by <6% of respondents for ease of reading
Base: 1084 Visitor Respondents (990 Overnight, 94 Day)

3.36 Visitor information **during** a visit is used more by overnight visitors (89%) than day visitors (62%) and offline information is more typically used. As walking is a key activity amongst visitors, maps remain a key source of information for both day (35%), overnight visitors (50%) and those who have visited the area before (51%).

3.37 Leaflets are also popular with two fifths of visitors (42%) but particularly new visitors (51%) and overnight visitors (44%) but less so for day visitors (15%).

3.38 TICs are mentioned by a third (33%) and particularly amongst new visitors (41%), overseas visitors (52%) and English visitors (34%) but less so amongst day visitors (10%) and people already based in Wales (14%) who often already have a good level of local knowledge.

3.39 Guidebooks are also used by a quarter (25%) and particularly amongst overseas visitors (41%) and new visitors (33%).

3.40 The National Park website is used during the trip by around one in seven visitors (14%) irrespective of whether for day or overnight trips. A fifth of new visitors (20%) and overseas visitors (21%) used the site during their visit.

3.41 Comparing the information sources used whilst in the area mentioned by this year's respondents to the previous year again shows some significant changes. As previously, some changes in the questionnaire account for some of the differences in results, as shown below.

3.42 The use of leaflets has more than doubled from 18% to 42% although the definitions are slightly different in the two surveys. The proportion using the destination website has also risen from 10% - 14% whilst visitors are in the area and this change is statistically significant.

3.43 In contrast, just 6% say they use other websites whilst in the area - halved from the previous year's figure of 12%.

3.44 Overall, fewer respondents said that they didn't use information whilst in the area (13%) compared with a fifth (21%) in the previous survey, pointing to an increasing need for information for visitors to the area once they have arrived.

What information resources, if any, did you use to plan your trip whilst in the area?'	**2013-14**	**2012-13**
Maps e.g. Ordnance Survey **added in 2013-14*	49%	-
Leaflets **Advertising leaflets in 2012-13*	42%	18%*
Tourist Information Centre	33%	34%
Guidebook(s)	25%	26%
Other brochure(s)	17%	16%
National Park Visitor Guide	15%	13%
Brecon Beacons National Park website www.breconbeacons.org	14%	10%
I did not use any information whilst in the area	13%	21%
Brecon Beacons Tourism website	8%	8%
Other website(s)	6%	12%
Visit Wales website	5%	5%
Newspaper / magazine	5%	6%
Other	4%	12%
Mid Wales and Brecon Beacons brochure **removed after 2012-13*	-	11%

Where are leaflets obtained?

3.45 In a new question for this year, those respondents who said they used leaflets (410 respondents) were asked where they picked them up. Some mentioned more than one source but most (80%) picked up leaflets from their accommodation, 47% from a TIC, 25% from a visitor attraction and 7% from elsewhere such as cafes, pubs and shops.

Destination website used to decide what to do and to help find accommodation

3.46 Following the launch of the new destination website – www.breconbeacons.org, those who had used the website were asked some additional questions relating to how they had used the site.

3.47 Three in ten (29%) used the website to help find accommodation, 57% did not at 14% couldn't remember.

3.48 Over three quarters (77%) used the site to help them to decide the sort of things they wanted to do during their visit whilst 17% said they didn't and 6% were unsure.

3.49 Finally, website users were asked how the website could be improved to help with planning a trip. The sample of 61 respondents answering this question is small but around half said they couldn't think of anything that should be improved, with some commenting that they thought that the website was very good already.

"It is fine already" "It doesn't need improving as far as I can tell"

"You covered everything" "All very clear"

3.50 The remaining respondents made the following suggestions:

Improve visitor information, content and presentation (12 respondents) – more prominent information on things to do and make sure information is up to date and specific

"Provide links to age relevant activities particularly for teenagers"

"Maybe easier to access attractions on map by location"

"Top attractions more prominent" "More info about dogs' access"

"Unfortunately hampered by the lack of things to do other than walking"

"Weather information could be more accessible"

"Have information about the wildlife and how the beacons were formed"

"It could have warned me the waterfall walk carpark needed 4 £1 coins!"

"Remove bus routes that do not exist for return journeys from out walking - Mountain Ridge walk return bus - there isn't one so cab cost £24 to get back to Storey Arms"

"The website tends to be a bit confusing, but otherwise very good"

"It is attractive, but a little cluttered"

"List of events /local markets/agricultural shows/fetes/art exhibitions etc"

"Live availability accommodations search rather than only providing links to websites"

More and better walking information and maps (9 respondents)

"More details on places to walk, parking etc" "Graded walks"

"More downloadable walks/maps" "Publish more walking routes"

"Map feature showing walks by length / type"

"Better walking maps for dogs would help"

Technical features and layout (5 respondents) – image loading and ease of access

"Thought it was very good but sometimes a bit slow loading pages compared to other web sites visited at same time (i.e. not my PC)"

"Mobile version"

"A lot of the links to pages or leaflets didn't work which was frustrating"

"Quicker loading pages for mobile internet"

"Good site, but very image-heavy so takes ages to load!"

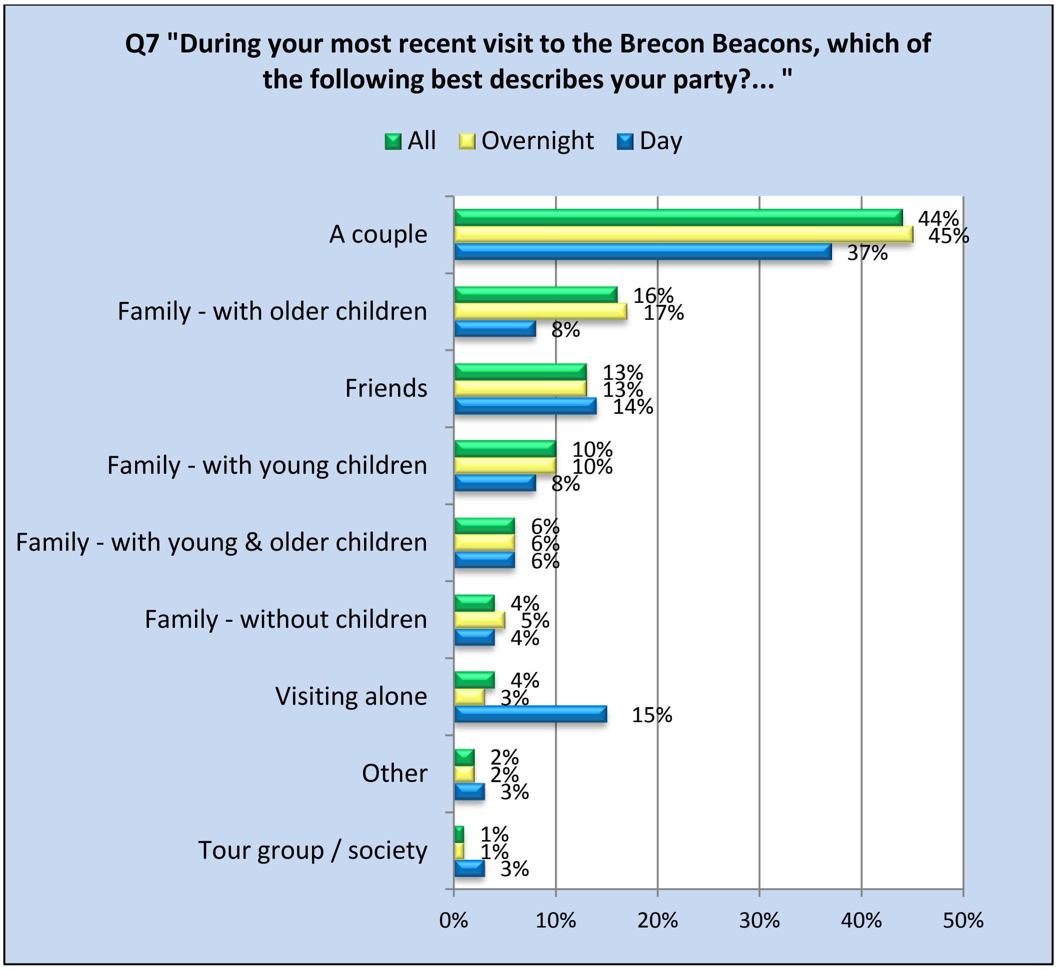
Postcode information to help with SATNAVs (3 respondents)

"More postcodes"

"The tourist attractions could include exact SATNAV postcodes to the destination."

"Postcodes of sites of interest, such as Llangorse Lake, would be v helpful so a sat nav could be used"

Popular with couples and families with children



Base: 1117 Visitor Respondents (1020 Overnight, 97 Day)

3.51 The Brecon Beacons appeals to a range of visitor groups types but to couples in particular. Two fifths of visitors were couples (44%) but this falls to just over a third of day visitors (37%) compared to 45% of overnight visitors. 51% of new visitors were couples.

3.52 A third of overnight visitor respondents are families with children (33%) but less so amongst day visitors (22%).

3.53 Groups of friends make up around 13% of respondents with little difference by visit type.

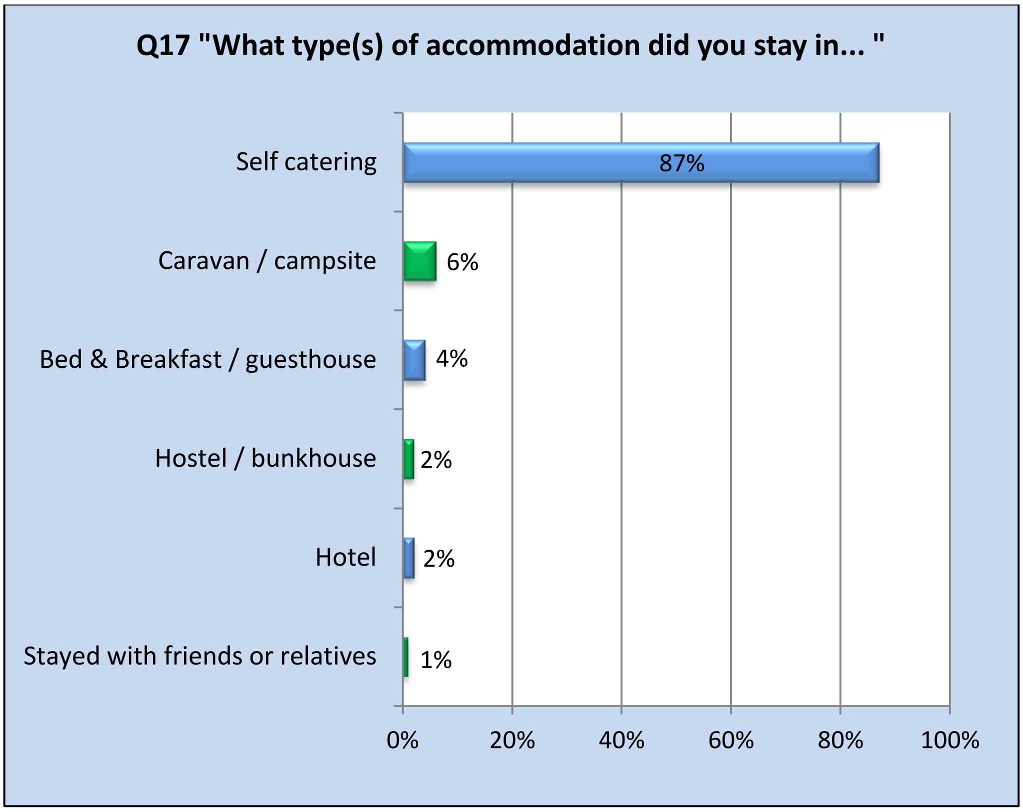
3.54 Overall, one in twenty five respondents (4%) visited the area alone but this is closer to one in seven day visitors (15%).

3.55 The average party size was 3.4 people and party size ranged from 1 to 36 people. The average party size of overnight visitors is the same but is slightly lower for day visitors (3.2 people). Families with children have an average group size of 4.9 people.

3.56 Party composition is broadly similar to the previous survey but there are a few slight changes. Families with older children make up a slightly higher proportion of party types rising from 13% to 16%. In contrast, those visiting alone make up a slightly lower proportion reducing from 6% last year to 4% in 2013-14.

Which of the following best describes your party?'	**2013-14**	**2012-13**
A couple	44%	42%
Family - with older children	16%	13%
Friends	13%	13%
Family - with young children	10%	11%
Family - with young & older children	6%	6%
Visiting alone	4%	6%
Family - without children	4%	4%
Other	2%	2%
Tour group / society	1%	1%
Families with children	*32%*	*30%*

Self-catering accommodation dominant



Base: 979, Overnight Visitor Respondents

3.57 The majority of staying visitors used self-catering accommodation (87%) with a few using caravan/campsites (6%), B&Bs (4%), hotels (2%) and hostels/bunkhouses (2%).

3.58 As the majority of overnight visitors who responded to the survey were sourced through Brecon Beacons Cottages, this is reflected in the type of accommodation used during the trip.

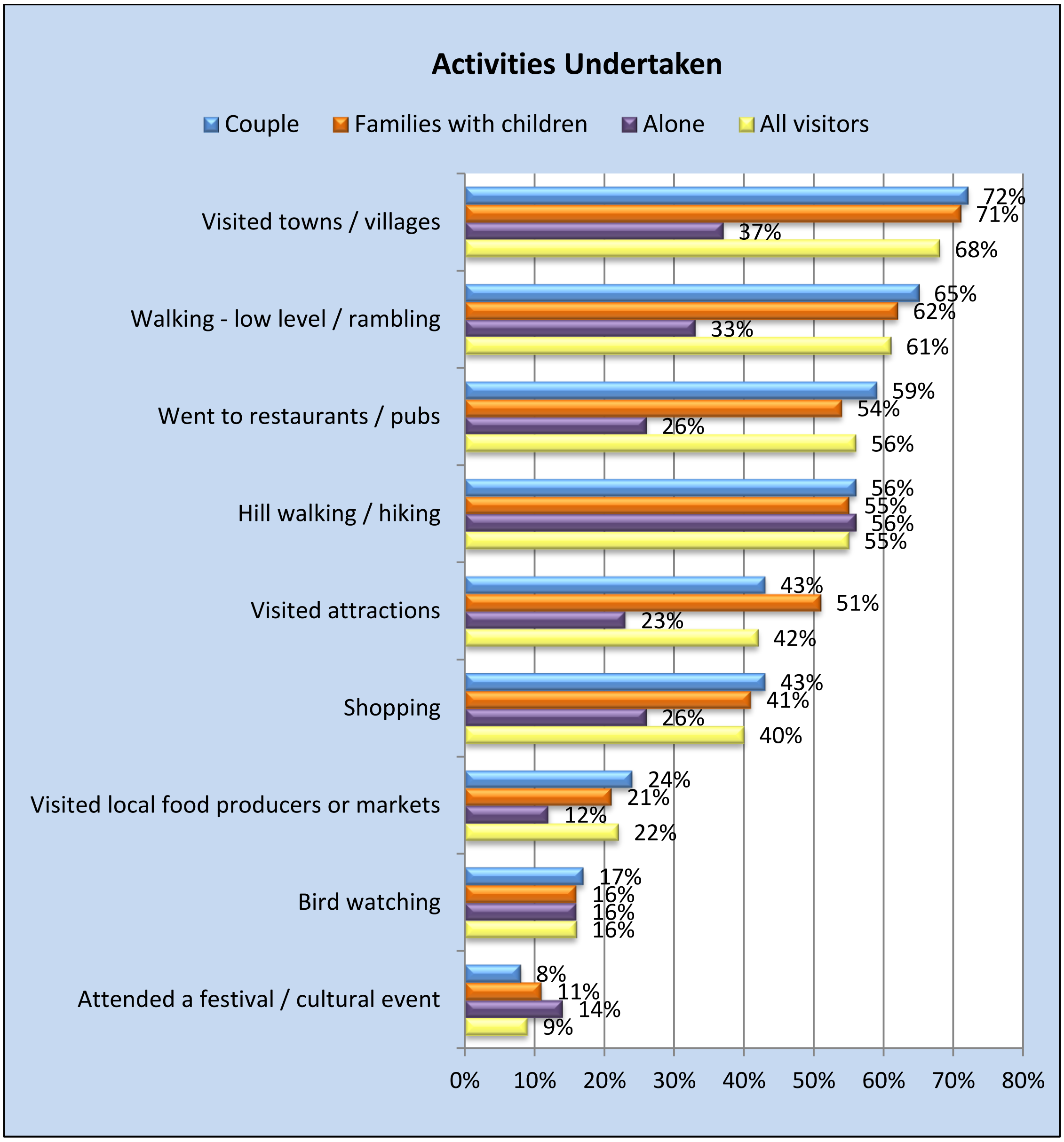
3.59 Similarly, this reflects on the comparative data with the previous survey as the number of self-catering accommodation makes all of the changes in the accommodation data significantly different.

'What type(s) of accommodation did you stay in?'	2013-14	2012-13
Self catering	87%	54%
Caravan / campsite	6%	27%
Bed & Breakfast / guesthouse	4%	6%
Hotel	2%	7%
Hostel / bunkhouse	2%	4%
Stayed with friends or relatives	1%	2%
Canal boat *added in 2013-14*	0%	-
Other	0%	1%

Length of Stay

3.60 Overnight visitors stayed for an average of 5.8 nights, up from 4.9 nights in 2012-13 and this reflects the use of self-catering accommodation. The sample size for other accommodation types is too small to allow for further analysis.

Activities undertaken when in the area



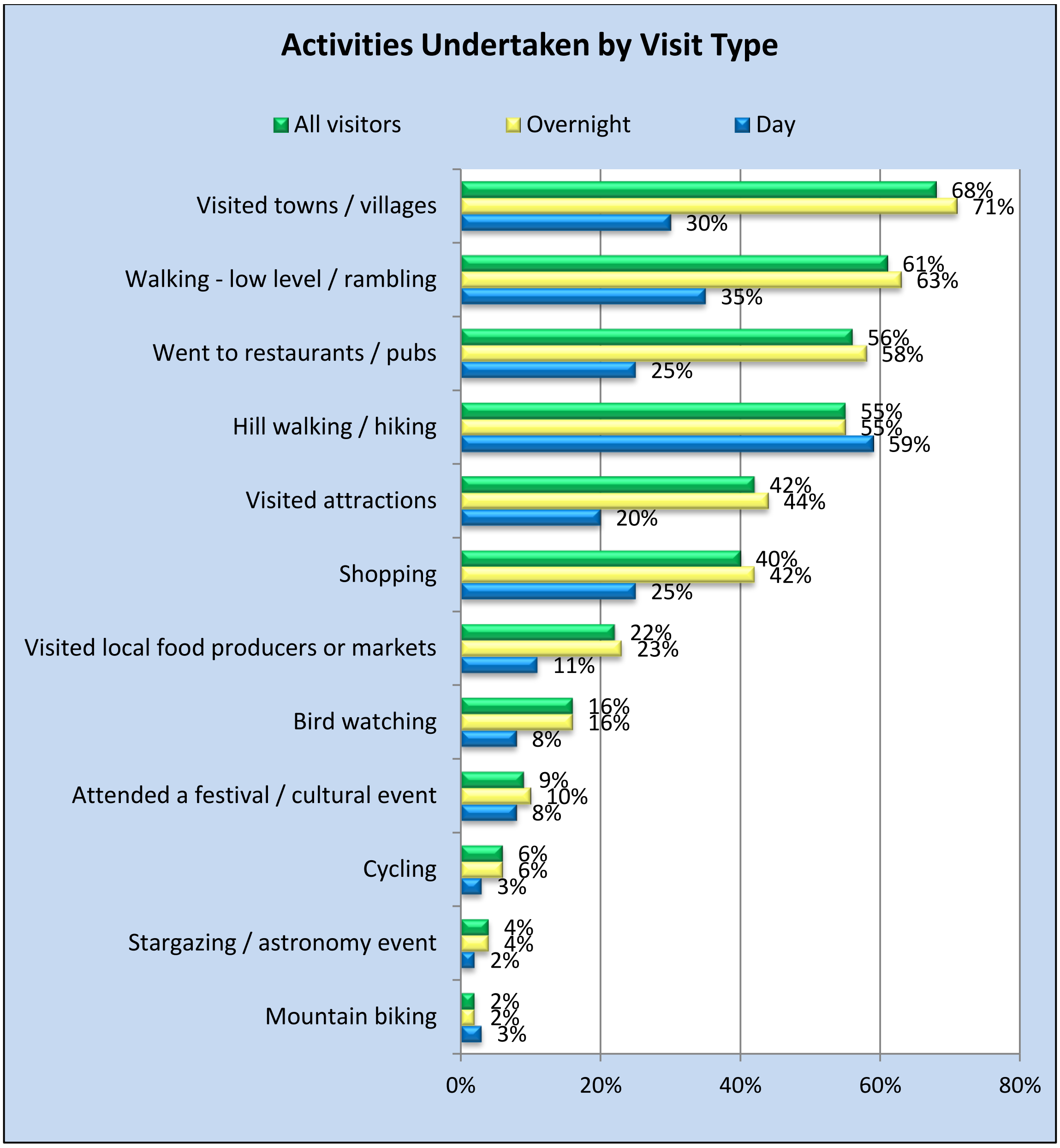
Base: 1114 Visitor Respondents

3.61 Respondents were asked what type of activities they did during their trip in the Brecon Beacons and were able to give as many responses as appropriate.

3.62 To make the chart easier to read, activities with lower scores have been omitted. These include cycling (6%), stargazing (4%), mountain biking (2%), fishing (2%) and creative activities (1%).

3.63 The most popular activities for couples were visiting towns and villages (72%), low level walking (65%), eating out in restaurants/pubs (59%) and hill walking (56%). Families with children showed similar levels of interest in these activities but also in visiting attractions (51%) compared to 42% overall.

3.64 Lone visitors are most interested in hill walking/hiking (56%) and to a lesser visiting towns/villages (37%) and low level walking/rambling (33%).



Base: 1114 Visitor Respondents (1018 Overnight, 96 Day)

3.65 There are some differences in the activities undertaken by day and overnight visitors are shown above, largely as a consequence of the amount of time available on the trip.

3.66 Outdoor activities such as hill walking/hiking (59%) and low level walking (35%) were most popular with day visitors along with visiting towns and villages (30%).

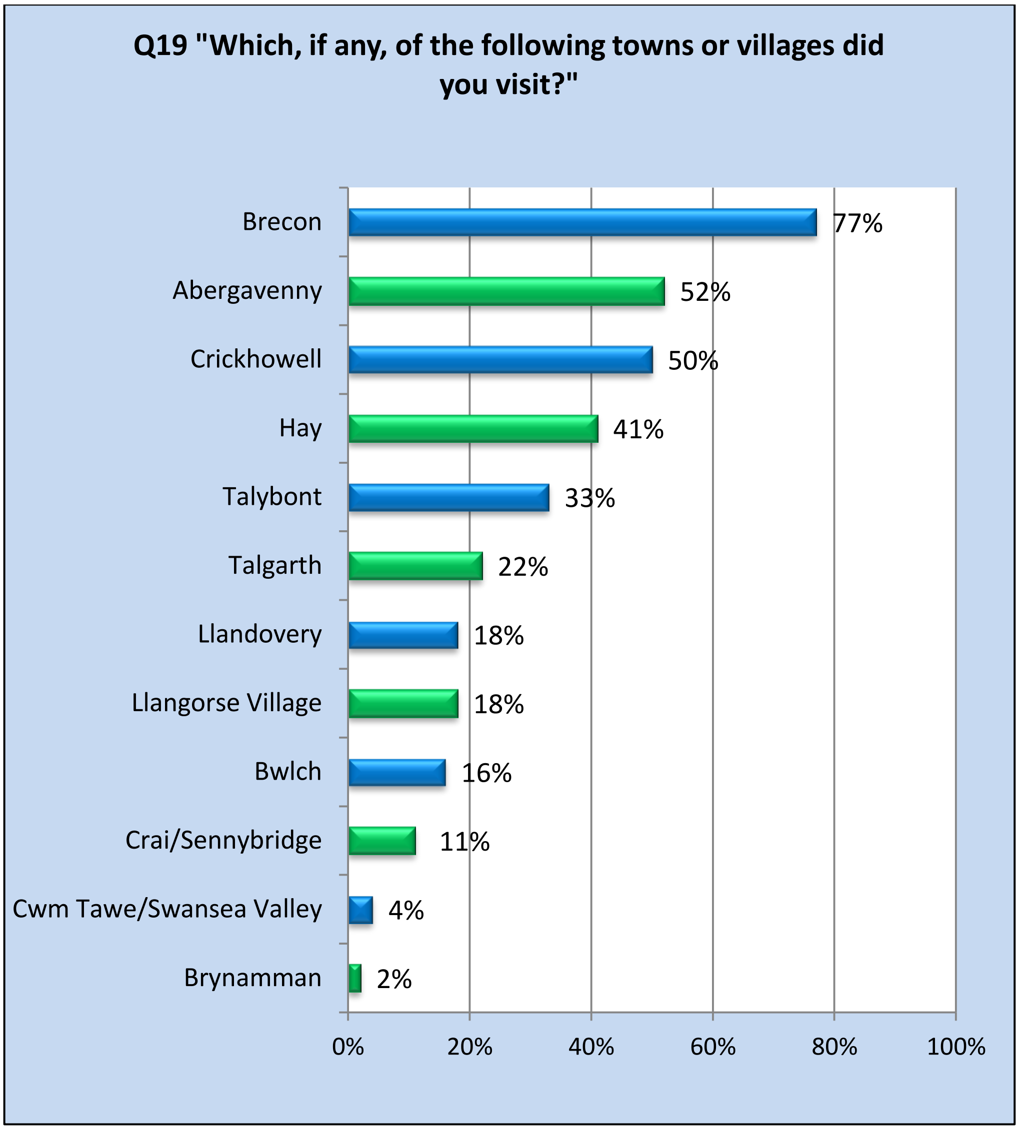
3.67 A quarter of day visitors went shopping (25%), ate out (25%) or visited attractions (20%) which is in most cases more than half by comparison with staying visitors.

3.68 Compared with the previous survey, statistically significant differences in the activities undertaken whilst visitors were in the area are highlighted below. These include a rise in the proportion of those visiting towns and villages from 63% to 68%.

3.69 However, fewer visitors went to restaurants/pubs (down 6%), visited local food producers or markets (down 3%) and took part in mountain biking (4% fall) and creative activities (1% drop).

'Which, if any, of the following activities did you do in the Brecon Beacons?'	**2013-14**	**2012-13**
Visited towns / villages	68%	63%
Walking - low level / rambling	61%	64%
Went to restaurants / pubs	56%	61%
Hill walking / hiking	55%	56%
Visited attractions	42%	39%
Shopping	40%	37%
Visited local food producers or markets	22%	25%
Bird watching	16%	14%
Other	9%	10%
Attended a festival / cultural event	9%	9%
Cycling	6%	7%
Stargazing / astronomy event **added in 2013-14*	4%	-
Horseriding **added in 2013-14*	2%	-
Fishing	2%	3%
Mountain biking	2%	6%
Creative activities (painting, pottery etc)	1%	2%
I did not do any activities on this visit	0%	1%

Brecon, Abergavenny and Crickhowell particularly popular



Base: 655 Visitor Respondents Visiting Towns and Villages

3.70 This question was new to this year's survey and was answered mostly by overnight visitors. Results are shown overall rather than by type of visit due to the small sample of day visitors who answered this question.

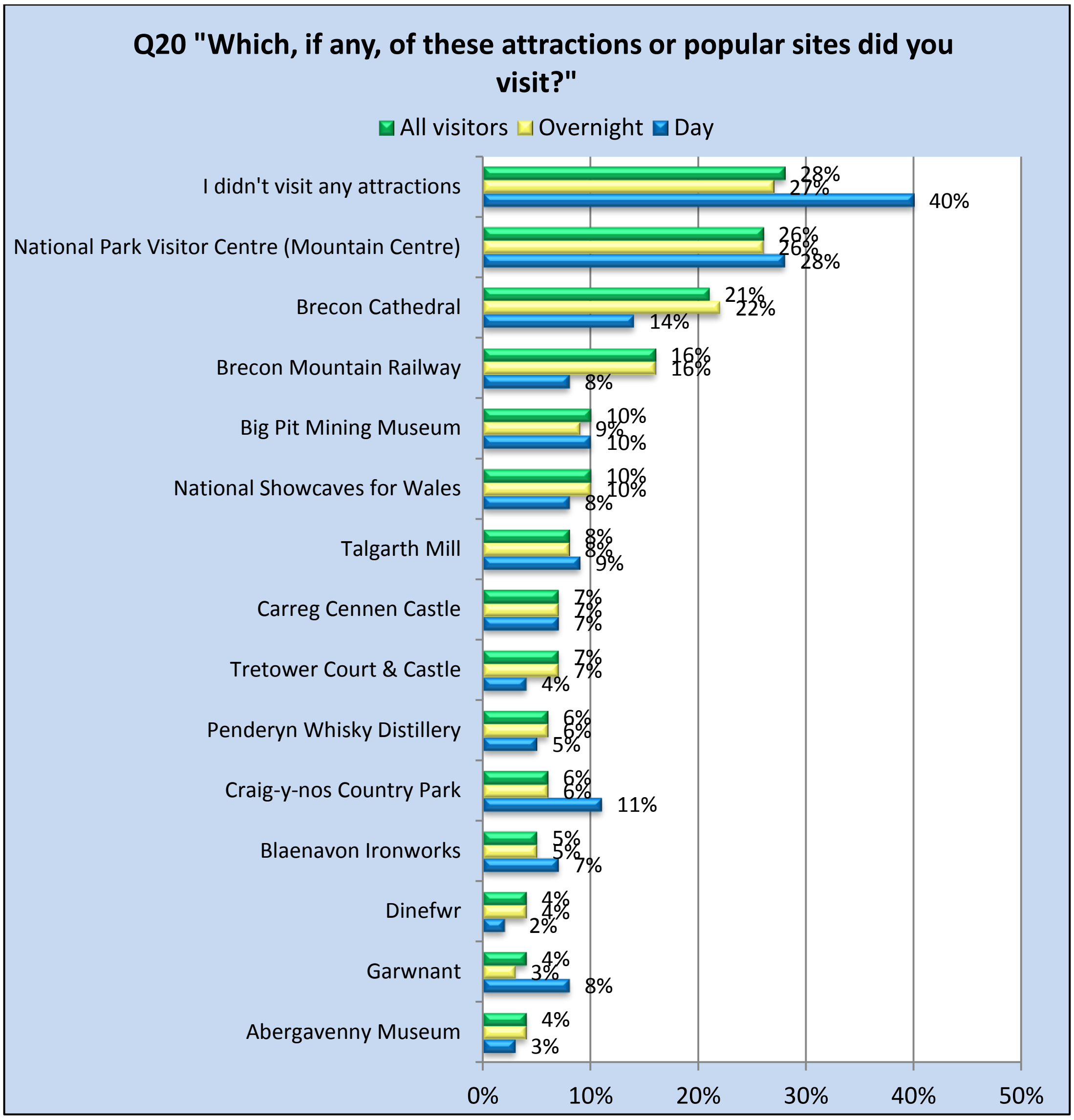
3.71 Over three quarters (77%) of those visiting towns and villages said they visited Brecon and over half Abergavenny (52%) and Crickhowell (50%).

3.72 Hay was also visited by two in five (41%) and Talybont by a third (33%).

3.73 No comparative data is available as this was a new question to the survey in 2013-14.

Attractions and popular sites

3.74 Brecon Beacons covers a large area and has an extensive number of sites and attractions. In this year's survey, attractions were split into two types – 'attractions or popular sites' covered in Q20 and 'natural sites and locations' covered in Q21.



Base: 1010 Visitor Respondents (918 Overnight, 92 Day)

3.75 Respondents could select one or more response to indicate the range of attractions visited, where relevant. 28% did not visit any of these attractions, rising to 40% for day visitors - some prefer to visit the 'natural' sites.

3.76 The most popular attractions or sites visited include the National Park Visitor Centre (26%), Brecon Cathedral (21%), and Brecon Mountain Railway (16%).

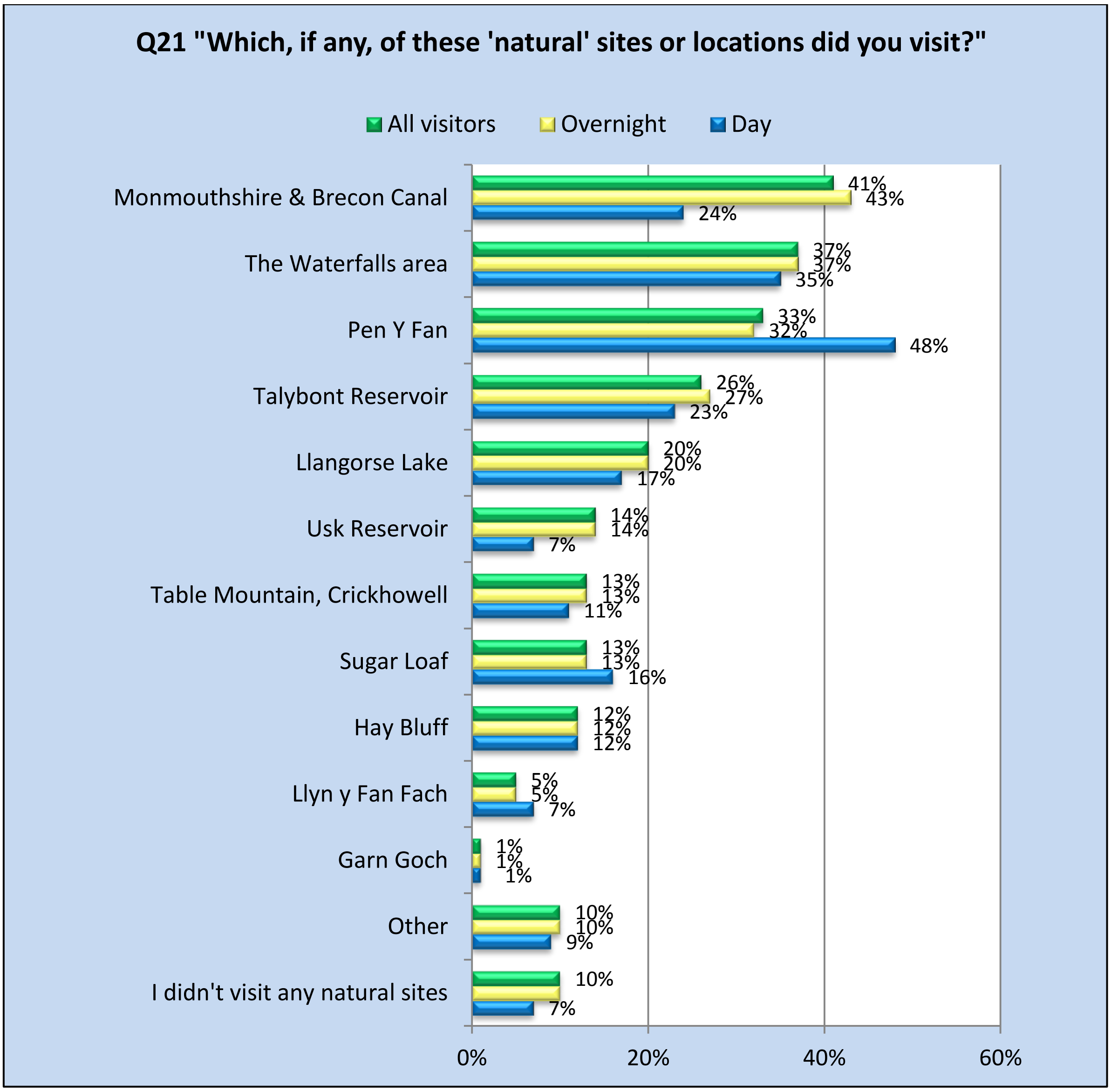
3.77 As this question was changed since the last survey, comparative information has been provided for the attractions/sites in the new format. There has been a statistically significant rise in the proportion of those visiting Brecon Mountain Railway (up 3%), whilst other attractions have been visited by fewer respondents compared to last year's survey.

3.78 In particular, we note those visiting Brecon Cathedral has fallen from 27% to 21% - possibly as there are fewer campsite respondents in this year's sample compared to those who took part in last year's survey. One of the campsites promoting last year's survey was located near to the Cathedral.

3.79 There are also fewer visitors to Big Pit Mining Museum (down 3%), Tretower Court & Castle (down 3%), The Regimental Museum (down 3%), Blaenavon Ironworks (down 2%) and Abergavenny Museum (down 2%).

'Which, if any, of these attractions or popular sites did you visit?'	**2013-14**	**2012-13**
National Park Visitor Centre (Mountain Centre)	26%	25%
Brecon Cathedral	21%	27%
Brecon Mountain Railway	16%	13%
National Showcaves for Wales	10%	8%
Big Pit Mining Museum	10%	13%
Talgarth Mill **added in 2013-14*	8%	-
Tretower Court & Castle	7%	10%
Carreg Cennen Castle	7%	6%
Craig-y-nos Country Park	6%	8%
Penderyn Whisky Distillery	6%	6%
Blaenavon Ironworks	5%	7%
Abergavenny Museum	4%	6%
Garwnant	4%	3%
Dinefwr	4%	4%
Cantref Adventure Farm	3%	4%
The Regimental Museum	3%	6%
Llangorse Rope & Activity Centre	3%	3%
Brecknock Museum	1%	1%

Natural sites and locations are very popular



Base: 1010 Visitor Respondents (932 Overnight, 95 Day)

3.80 In terms of ‘natural’ sites, two fifths (41%) of visitors went to the Monmouthshire & Brecon Canal but this was most popular amongst overnight visitors (43%) rather than day visitors (24%). This compares with 39% last year, but this is not a statistically significant difference.

3.81 Day visitors are most likely to visit Pen Y Fan (48%), The Waterfalls area (35%), the Canal and Talybont Reservoir (23%).

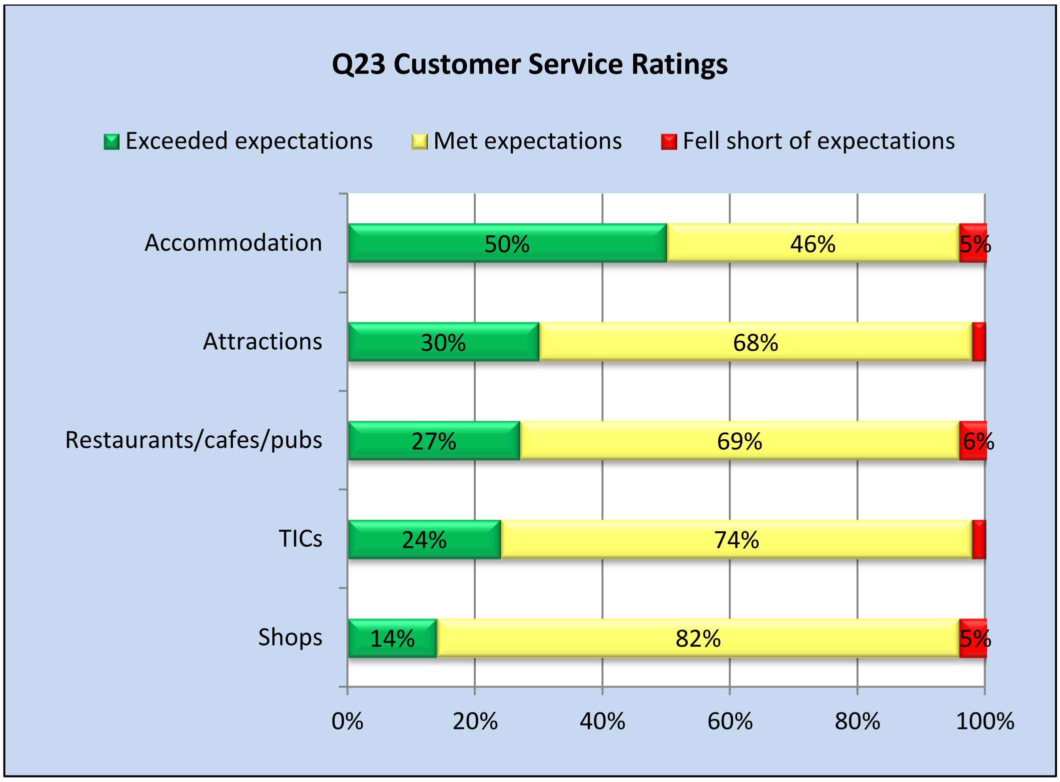
3.82 In addition to the Canal, staying visitors typically visit The Waterfalls area (37%), Pen Y Fan (32%), Talybont Reservoir (27%) and Llangorse Lake (20%). Only some of these sites were included in last year’s survey as attractions and in a question formatted differently. None show any significant change in popularity compared with the previous survey.

Satisfaction ratings versus expectations

3.83 Satisfaction ratings are an important means of identifying aspects of the visitor experience which are particularly good or perhaps need attention. To assess this, visitors were asked about the extent to which they were satisfied with various aspects of their experience including customer service, quality of goods and services and overall experience.

3.84 For each of these questions, all 'not applicable' responses have been excluded to ensure that ratings are only based on those who have experience of using a particular service or aspect of the visit.

Overall customer service meets or exceeds expectations



Base: Varies according to rating; 573-982 Visitor Respondents

3.85 Expectations of customer service are either met or exceeded in most aspects of visits but accommodation receives the best ratings with 50% of visitors indicating that expectations were exceeded compared with 30% for attractions, 27% for restaurants/cafes/pubs and 24% TICs. Just 14% said the same of shops.

"Perfect accommodation, with friendly and attentive landlady"

"Friendliness of everyone in Crickhowell particularly the person we'd rented the house off for the week"

"We had a great time at the climbing centre in Llangorse, overall the quad biking and archery we did at 7 sisters although not well advertised gave outstanding welcome and customer care and I would go there again."

3.86 Whilst by no means a widely held view, some visitors found that the level of customer service fell short of their expectations in restaurants/cafes and pubs (6%), accommodation (5%) and shops (5%).

3.87 If a destination makes a good impression on visitors, particularly those who are visiting for the first time, recommendations are more likely to be positively made through word of mouth and social media. Whilst the customer service ratings are on the whole are good, there are some negative responses which should be considered and addressed, where possible.

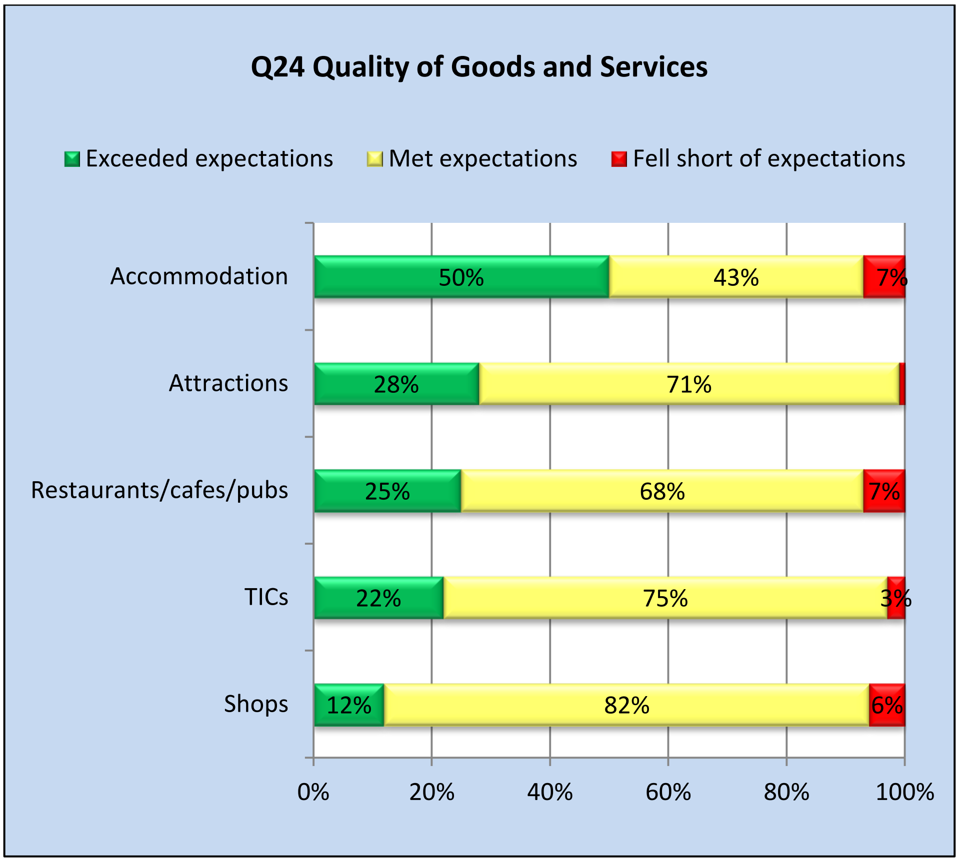
3.88 One in fourteen **new visitors** said that the customer service in restaurants/cafes or pubs (7%) fell below expectations.

3.89 Comparisons of the Customer Service Ratings between this year's survey and last year's survey shows little statistically significant change in the ratings given by respondents. The only change to comment on is the reduction in the proportion of respondents suggesting TICs fall short of expectations from 5% in 2012-13 to 2% in this year's survey.

3.90 The comparative figures are provided below showing the previous survey results in grey, for ease of reference:

Customer Service Ratings Comparison Summary	**Year**	**Exceeded expectations**	**Met expectations**	**Fell short of expectations**
Shops	2013/14	14%	82%	5%
	2012/13	14%	80%	6%
TICs	2013/14	24%	74%	2%
	2012/13	24%	72%	5%
Restaurants/cafes/pubs	2013/14	27%	69%	6%
	2012/13	24%	70%	7%
Attractions	2013/14	30%	68%	2%
	2012/13	31%	68%	1%
Accommodation	2013/14	50%	46%	5%
	2012/13	54%	43%	4%

Quality of offering meets but generally doesn't exceed expectations



Base: Varies according to rating; 558-987 Visitor Respondents

3.91 In terms of the **quality** of goods and services, the results follow a similar pattern with expectations exceeded in accommodation (50%) and attractions (28%), but less so with restaurants/cafes/pubs (25%) and TICs (22%).

3.92 The lowest ratings are given for the quality of goods and services in shops where just over one in ten say that their expectations were exceeded (12%).

3.93 The number of respondents who said that the quality of goods and services fell below expectations is relatively low but still evident for restaurants/cafes/pubs (7%), accommodation (7%), shops (6%) but less so for TICs (3%) and attractions (1%).

3.94 Accommodation was disappointing for 10% of families with children who said it fell below expectations.

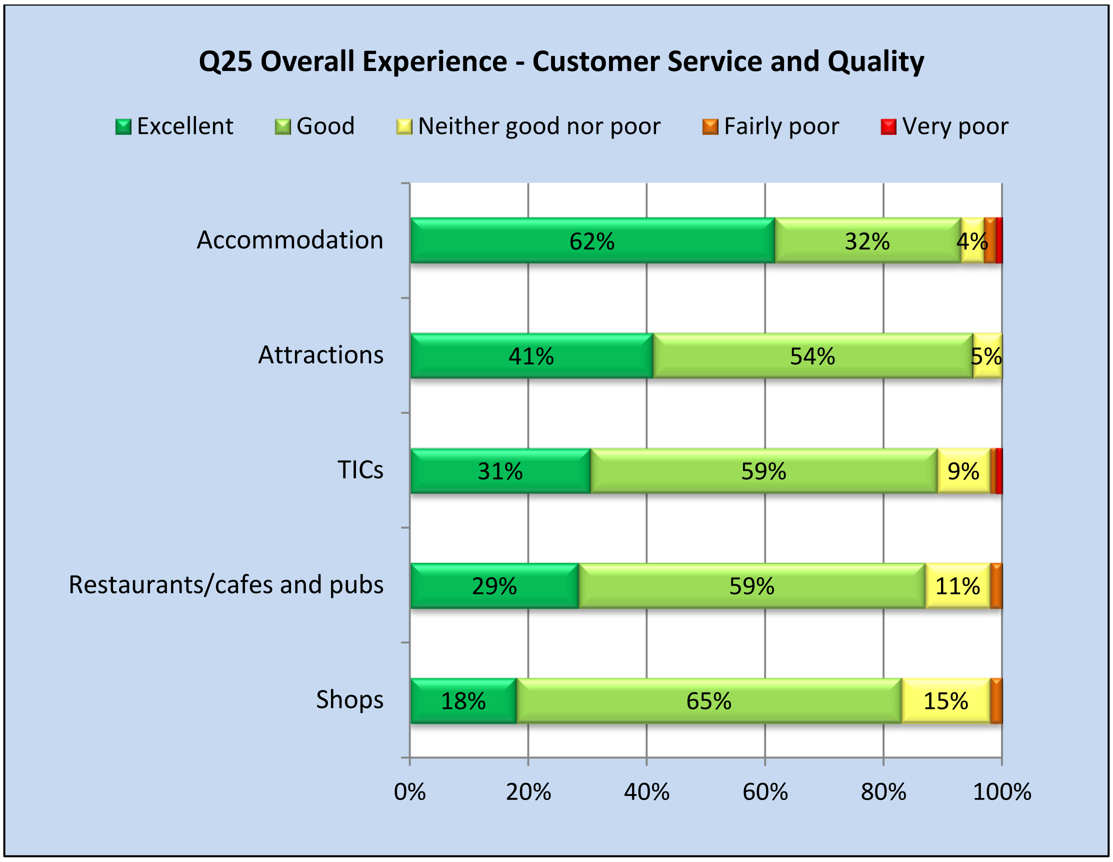
3.95 The quality of goods and services during shopping is also below expectation for 9% of new visitors.

3.96 Compared to the previous survey, there is a little statistically significant change in the ratings for the quality of the goods and services offering in the area.

3.97 One change that does show a change worth noting is that 7% of respondents said the quality of the accommodation fell short of their expectations compared with 4% in the previous survey.

Quality of Goods and Services Comparison Summary	**Year**	**Exceeded expectations**	**Met expectations**	**Fell short of expectations**
Shops	2013/14	12%	82%	6%
	2012/13	12%	82%	6%
TICs	2013/14	22%	75%	3%
	2012/13	20%	76%	4%
Restaurants/cafes/pubs	2013/14	25%	68%	7%
	2012/13	22%	72%	7%
Attractions	2013/14	28%	71%	1%
	2012/13	27%	72%	2%
Accommodation	2013/14	50%	43%	7%
	2012/13	53%	43%	4%

Overall experience ratings generally very positive



Base: Varies according to rating; 600-1005 Visitor Respondents

3.98 Visitors were asked to rate their **overall** experience for each aspect of their visit. The Brecon Beacons does well with generally positive ratings across all aspects of service.

3.99 The overall ratings are most positive for accommodation and attractions which received the highest ‘excellent’ or ‘good’ ratings from more than 94% of visitors compared with restaurants/cafes/pubs (88%), TICs (90%) and shops (83%) although the last group have more ‘good’ than ‘excellent’ ratings.

3.100 Negative ratings were few and far between – 3% ‘fairly’ or ‘very’ poor for accommodation, and 2% each for shops, restaurants and TICs.

3.101 Again, any negative experiences do not appear to have a significant impact on overall ratings but action should be considered to address these issues where practical to do so.

3.102 Comparison of the overall experience ratings show a number of statistically significant areas of change when compared with the previous survey.

3.103 The 'excellent' and 'good' ratings are combined to create the 'positive' rating and likewise the 'fairly poor' and 'very poor' ratings are joined resulting in the 'negative' score to show the contrast between the two extremes of the ratings given by respondents.

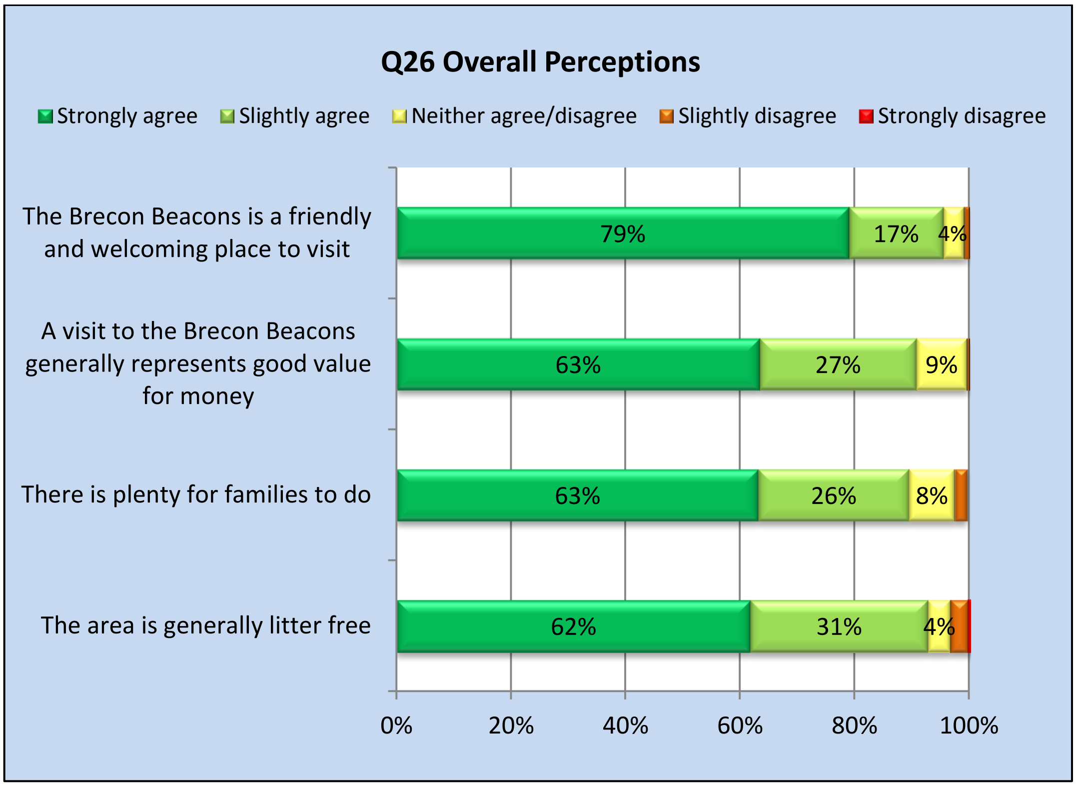
3.104 Most aspects of goods and service in the area have seen a significant increase in the experience ratings, particularly for shops (12% rise) and TICs (11% rise). The negative rating for hospitality outlets has reduced significantly from 5% to 2% since the last survey.

Overall Experience: Customer Service and Quality Comparison Summary	Year	Excellent	Good	Neither good nor poor	Fairly Poor	Very poor	Positive	Negative
Shops	2013/14	18%	65%	15%	2%	0%	83%	2%
	2012/13	16%	55%	25%	2%	1%	71%	3%
Restaurants, cafes and pubs	2013/14	29%	59%	11%	2%	0%	87%	2%
	2012/13	28%	54%	12%	3%	2%	82%	5%
TICs	2013/14	31%	59%	9%	1%	1%	89%	2%
	2012/13	27%	51%	18%	1%	2%	78%	3%
Attractions	2013/14	41%	54%	5%	0%	0%	95%	0%
	2012/13	39%	51%	9%	0%	1%	90%	1%
Accommodation	2013/14	62%	32%	4%	2%	1%	93%	3%
	2012/13	65%	29%	4%	1%	1%	94%	2%

Perceptions of the Brecon Beacons

3.105 The impressions visitors have of a destination undoubtedly influences potential recommendations to family, friends and colleagues.

3.106 To gauge how the Brecon Beacons is perceived, respondents were asked about a number of aspects of their visit including value for money, friendliness and welcome, availability of family activities and perceptions of litter in the area.



Base: Varies according to rating; 994-1094 Visitor Respondents

3.107 Perceptions of the area are good on the whole, particularly on the 'welcome' visitors receive (96% positive) and litter-free environment (93%). Negative opinions are few but a small proportion of respondents feel that the area is not litter-free (4%) and 2% disagree that there is plenty for families to do.

3.108 The results compared with the previous survey are given below, showing an improvement in the positive ratings for family activities and the welcome visitors feel. However, litter receives a more negative rating (4%) compared to the previous survey (1%).

Statement	Year	Strongly agree	Slightly agree	Neither	Slightly disagree	Strongly disagree	Positive	Negative
The area is generally litter free*	2013/14	62%	31%	4%	3%	1%	93%	4%
	2012/13	53%	39%	6%	1%	0%	92%	1%
There is plenty for families to do	2013/14	63%	26%	8%	2%	0%	90%	2%
	2012/13	43%	41%	13%	1%	0%	84%	1%
A visit to the Brecon Beacons generally represents good value for money	2013/14	63%	27%	9%	0%	0%	91%	0%
	2012/13	48%	41%	9%	0%	0%	89%	0%
The Brecon Beacons is a friendly and welcoming place to visit	2013/14	79%	17%	4%	1%	0%	96%	1%
	2012/13	58%	36%	4%	1%	0%	94%	1%

*'The area is generally clean' 2012-13

Lots for families to do

3.109 Over two thirds (68%) of those travelling in family groups with children 'strongly agreed' that there is **plenty for families to do** with a further 23% 'slightly agree' (91% positive). Just 2% disagreed and the remaining 7% had no strong opinion either way. These ratings are slightly better than average where 89% agree to some extent.

"Scenery is superb, and people are very helpful and friendly, lots to do, yet very unspoiled and not crowded."

"The variety of things to do and see for families (and at good value/cost)"

A litter-free environment for most

3.110 Litter in the area is generally not perceived to be a problem with only a few respondents suggesting otherwise but some visitor groups are more positive than others. 8% of day visitors and 3% of staying visitors disagree to some extent that the area is generally litter-free.

3.111 Two thirds of new visitors (67%) strongly agree that the area is generally litter free compared with 62% overall and 59% of those who have visited before.

"Whilst walking through some farms, we found them extremely messy with especially plastic litter from silage covers and big containers. Some of the lambs had plastic round their necks. This mess is not necessary."

"We picked up quite a lot of litter when out walking, but this is the fault of other visitors not the area itself."

Visitors feel a strong sense of welcome

3.112 Almost all visitors feel that the Brecon Beacons is a friendly and welcoming place to visit (96%) and almost eight in ten (79%) strongly agree.

"Friendly welcoming people. Relaxing and beautiful environment"

"I would like to thank the owner for making us so welcome and the cake and apple juice was a lovely and very appreciated surprise. Will be back as soon as possible"

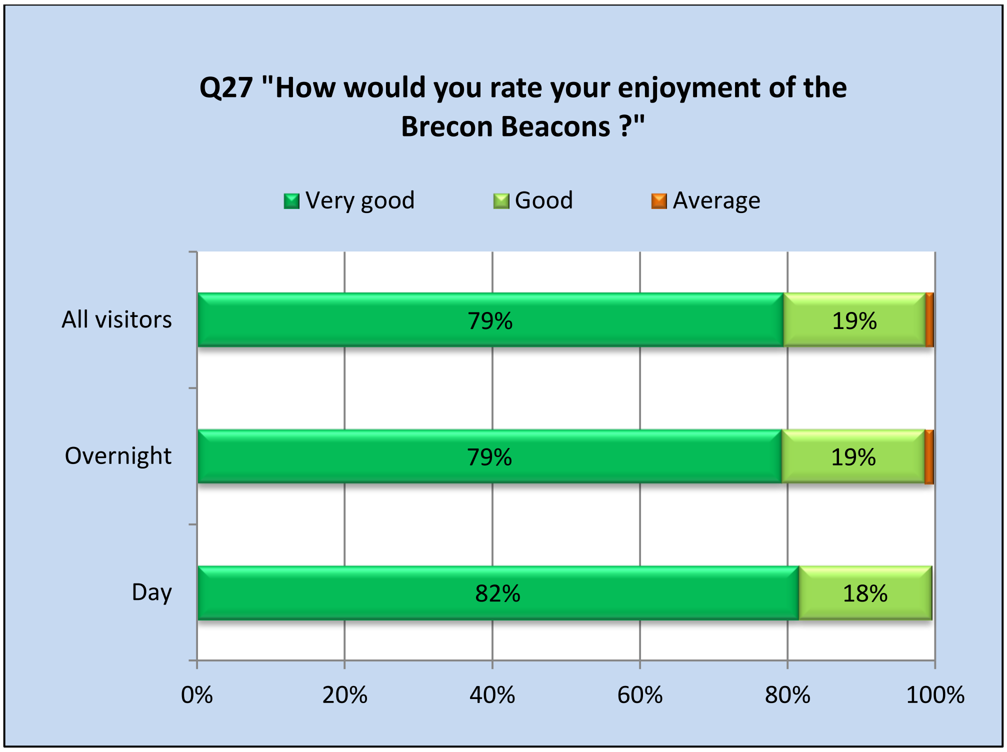
Good value for money

3.113 The area is generally considered to be good value for money with nine in ten agreeing (90%) including strong agreement from almost two thirds of visitors (63%).

"Watching the Red Kite feeding at Talsarn Really exciting, excellent value for money!"

"We enjoyed our visit to this area the cottage was excellent value and the attractions were good value for the money"

High enjoyment ratings

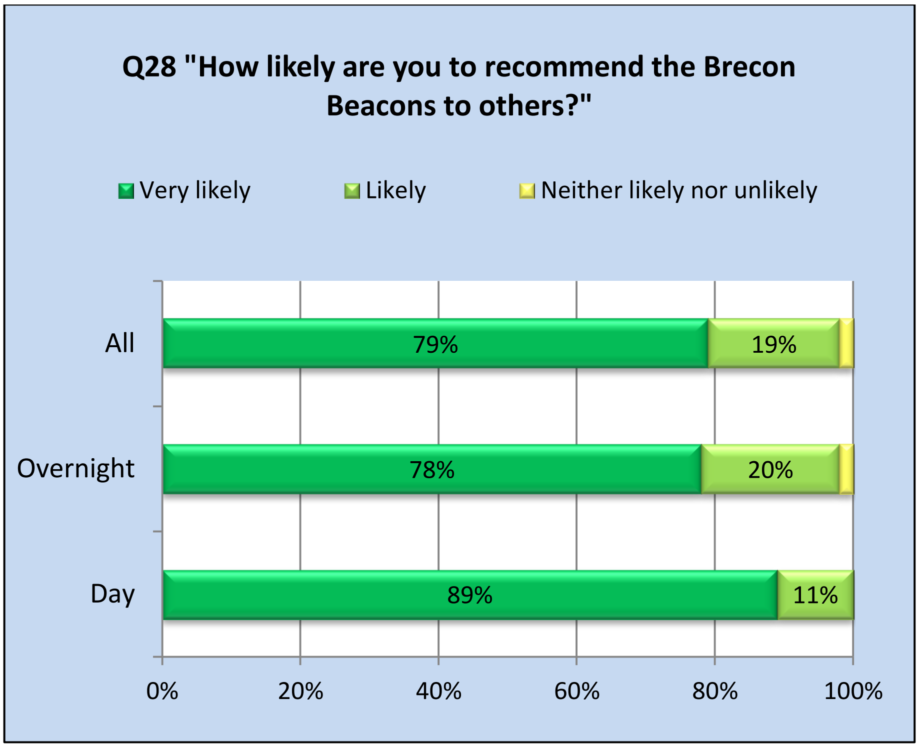


Base: 965 Visitor Respondents (873 Overnight, 92 Day)

3.114 This question was a new addition to this year's survey to establish a benchmark of how much visitors enjoy their overall experience. As a result, there is no comparative data from the previous survey.

3.115 Overall, the visit experience is considered to be 'very good' by the majority of respondents with little variation by type of visit, visitor or visit history. However, 85% of those originating from Wales rate enjoyment at 85%, higher than the 79% overall average. In contrast, 75% of overseas visitors rate their experience 'very good'.

Most very likely to recommend, especially day visitors



Base: 1107 Visitor Respondents (1011 Overnight, 96 Day)

3.116 Encouraging advocacy to promote a destination is highly important, particularly with the increasing use of social media and its ability to allow images, thoughts, experiences and weblinks to be shared with ease amongst family, friends and colleagues.

3.117 More than three quarters of visitors (79%) are 'very likely' to recommend the area with a further 19% likely to do so. Previous visitors are the greatest advocates with four in five 'very likely' to recommend (80%) compared to first time visitors (74%).

3.118 Amongst visitor group type, lone visitors are the most likely to recommend (80%) but others have similar views with 79% of couples and 78% of both families with children and other groups very likely to recommend the Brecon Beacons to others.

3.119 As might be expected, visitors from Wales are the most likely to recommend to others (87% 'very likely') but visitors from London & South East are also strong advocates of the area (80%). Almost three quarters of overseas visitors (73%) are very likely to recommend.

3.120 Day visitors, many of which originate from Wales, are the most likely recommend (89% 'very likely') compared to 78% of overnight visitors.

3.121 There are no significant trends to note for this question when compared with the previous survey:

'How likely are you to recommend the Brecon Beacons to others?'	2013-14	2012-13
Very likely	79%	78%
Likely	19%	19%
Neither likely nor unlikely	2%	2%
Unlikely	0%	0%
Very unlikely	0%	0%

4. Non visitor feedback

4.1 The survey also offers the opportunity to gather information from people who have not visited the area within the previous 12 months. There were 84 non visitor interviews in the sample.

4.2 Non-visitors were asked about other destinations they have visited for a holiday or short break, reasons for not coming to the Brecon Beacons and intentions to visit in the next 12 months.

Breaks in Europe, South West and elsewhere in Wales are most popular

4.3 Those not visiting the Brecon Beacons in the last year were asked where else they took a holiday or short break. The most popular alternative destinations include Europe (37%), Devon & Cornwall (29%), elsewhere in Wales (21%), Lake District/Cumbria (15%), the South Coast (12%), London (12%), the South East (11%), the Cotswolds (11%) and abroad outside of Europe (11%). One in ten (10%) did not go anywhere during this time.

No strong barriers to visiting the Brecon Beacons

4.4 Non-visitors were asked for the reasons why they haven't visited the Brecon Beacons during the last year.

4.5 Almost three in ten (28%) non-visitors say that they intend to visit the Brecon Beacons but have not yet done so suggesting that there no particular barrier to visiting. A similar proportion said that they have not considered the area (26%).

4.6 Others comment that they had already booked a trip elsewhere (26%) and that they didn't have time to visit this year (15%).

Strong intentions to visit in the future for many

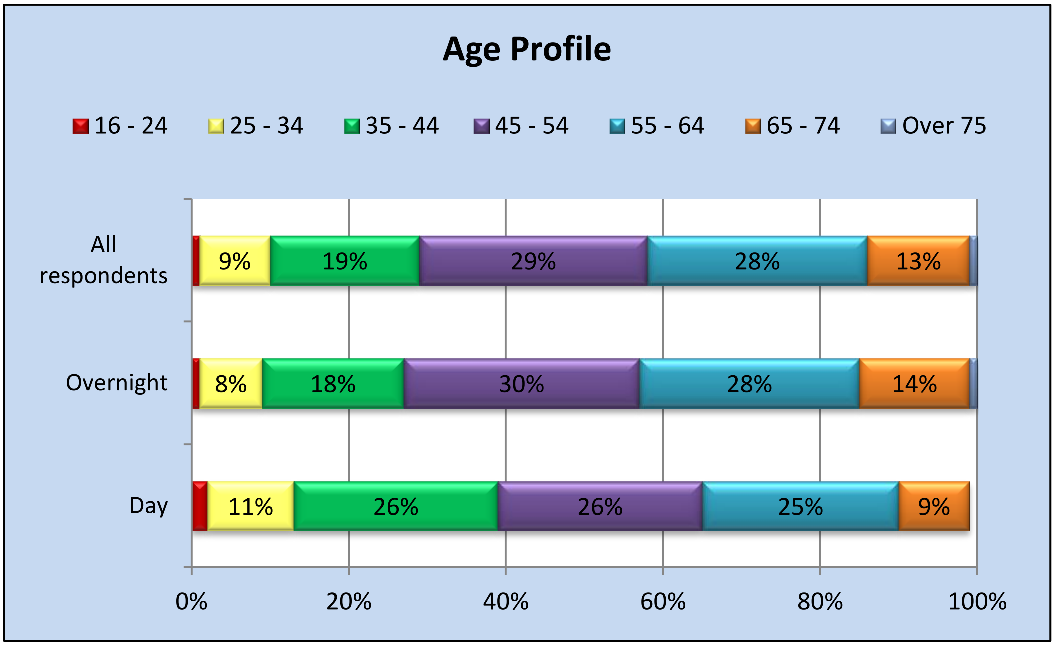
4.7 Two in five (42%) of those who have not yet visited said that they 'definitely intend to' in the next 12 months with a further 46% suggesting that they might do so.

4.8 Less than one in ten (9%) do not intend to visit and just 4% were unsure.

5. Demographics and Profile

5.1 Respondents were asked to provide information on age group and geographical location. These give useful information to determine how marketing activities align with the resulting visitor profile.

Age of respondents



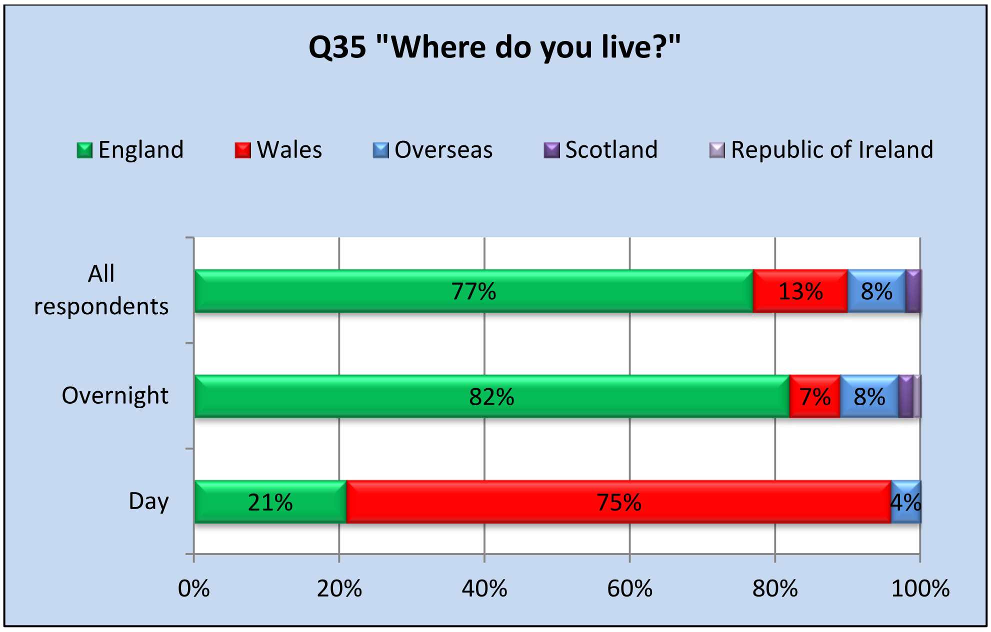
Base: 1194 respondents (1015 Overnight, 96 Day, 83 Non-visitors)

5.2 This question gives an indication of the age of the **respondent** rather than the party. The age group of each party would vary depending on the type of group e.g. large party, families and the number in the party.

5.3 The respondent age profile varies widely and there are no particularly dominant groups. Day visitor respondents typically have a slightly younger profile and whilst over 55's make up over two fifths of overnight visitors (43%), but just a third day visitors (34%).

5.4 Around half of overnight visitors (48%) are 35-54 rising to 52% for day visitors.

Respondents mostly from England and Wales



Base: 1186 respondents (1009 Overnight, 97 Day, 80 Non-visitors)

5.5 A large proportion of survey respondents are overnight visitors to the Brecon Beacons and their origins reflect this.

5.6 More than four fifths of overnight visitors (82%) are from England but the majority of day visitors (75%) are from Wales. A fifth of day visitors (21%) are from England, particularly from the Midlands.

5.7 Looking at origin compared with visit history, 13% of new visitors hale from overseas which is heading towards double the amount in the sample (8%).

5.8 English staying visitors come from the South East (26%), Midlands (16%), South West (15%), London (11%) and East Anglia (8%) reflecting marketing activity for the area.

5.9 Overseas visitors travelled from the Netherlands (39%), Belgium (9%), USA (8%), Germany (7%) and Australia/New Zealand (7%) amongst other countries. This reflects PR activity undertaken in these areas.