STRATEGIC
MARKETING

FINAL REPORT

Brecon Beacons Visitor Survey

Brecon Beacons Marketing and Coordination Group

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Contents **Page**

1. Executive Summary

Online survey background

1.1 The survey is based on the results of 1469 responses gathered through the same online surveys but gathered from different sources. The survey has been live since August 2012 the results cover responses up to early October 2013.

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 Almost all survey respondents (94%) had visited the Brecon Beacons within the last 12 months. 80% were staying overnight in the area, 12% were staying outside of the Brecon Beacons and 8% came from home for the day.

Mainly leisure visits and good awareness of National Park

1.4 The majority of visitors were visiting for leisure purposes (94%), 10% were visiting friends or relatives, 1% on business and 4% for some other reason.

1.5 Awareness of National Park designation is almost universal with almost all visitors aware of this before their visit (96%), 3% aware after their visit and just 1% not aware.

Non-serviced accommodation popular

1.6 Non-serviced accommodation is most popular amongst respondents. The majority of staying visitors used self catering accommodation (54%) and caravan/campsites (27%). 7% stayed in hotels and 6% in B&B or guesthouse accommodation.

1.7 Overnight visitors stayed for an average of 4.9 nights with the longest stays in self-catering accommodation (6.4 nights) and shorter breaks in B&Bs (3.7 nights) and on caravan/campsites (3.5 nights). The shortest stays were in hotels and hostels/bunkhouses which were both 2.8 nights on average. Stays with friends and relatives lasted around 3.1 nights.

Previous and new visitors

1.8 Half of all of visitors (51%) have been to the area within the last three years and a fifth (21%) more than three years ago. Over a quarter are new visitors to the area (28%). Visit history is similar amongst overnight visitors. A much higher proportion of day visitors have been to the area in the last three years (87%), and just 2% last visited more than three years ago. 11% of day visitors are new to the area.

Online visitor information important ahead of staying visits

1.9 The use of visitor information to **plan a trip** is more common amongst overnight rather than day visitors however 19% of visitors did not use any information resources and this rises to 33% for day visitors.

1.10 Where information resources are used ahead of a visit, the most popular are online resources. The National Park website is the most common source of information to plan a trip (36%) and is also relatively well used amongst day visitors (31%).

1.11 Other popular information sources include ‘other websites’ (33%), the Brecon Beacons Tourism website (26%) and the Visit Wales website (20%) - all mentioned more frequently by overnight visitors. Offline resources include guidebooks (18%), TICs (15%) and ‘other’ resources such as maps.

Offline visitor information used during staying visits

1.12 Online resources are used less **during** a trip. Where they are used, the most popular sources of in-visit information are TICs (34%) but less so amongst day visitors (15%), guidebooks (26%) and advertising leaflets (18%).

1.13 Again, day visitors make less use of all information sources and half (49%) did not use any information during their trip at all. The National Park and BBT websites were used by around one in ten of all visitors during their visit.

Landscape & scenery and tranquillity are key influences

1.14 A range of factors influence the decision to visit the area and the most influential of these are scenery/landscape (86%), peace & quiet (62%), a previous visit (47%), accessibility (36%) and the range of things to do (31%).

Walking, towns and villages and eating out are key activities

1.15 Activities undertaken by visitors include low level walking/rambling (64%), visiting towns and villages (63%), visiting restaurants/pubs (61%), hill walking/hiking (56%), visiting attractions (39%) and shopping (37%). Families with children have higher levels of interest in visiting attractions (48%).

1.16 Day visitors have slightly different preferences with the most popular activities being hill walking/hiking (59%), low level walking/rambling (55%), visiting towns/villages (39%), visiting restaurants/pubs (35%). There is less interest in visiting attractions (22%) and shopping (20%) although a fifth visited local food producers or markets (21%) compared to a quarter of all visitors (25%).

Canal and Waterfalls most popular attractions

1.17 The most popular attractions or popular sites visited include the Monmouthshire & Brecon Canal (39%), the Waterfalls area (38%), Brecon Cathedral (27%), National Park Visitor Centre (25%) and Llangorse Lake (22%).

Customer service expectations met but exceeded for accommodation

1.18 Customer service expectations are either met or exceeded in most aspects of visits but accommodation receives the best ratings with 54% of visitors indicating that their expectations were exceeded compared with 31% for attractions, 24% for TICs and restaurants/cafes/pubs and 14% of shops.

1.19 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 (7%), shops (6%), TICs (5%) and accommodation (4%).

Quality expectations met

1.20 In terms of the **quality** of goods and services, the results were similar with expectations exceeded in accommodation (53%) and attractions (27%), but less so with restaurants/cafes/pubs (22%), TICs (20%) and shops (12%).

1.21 As before, disappointment with the quality of goods and services is relatively low but nevertheless still present for restaurants/cafes/pubs (7%), shops (6%), TICs and accommodation (4%) and attractions (2%).

Overall ratings positive

1.22 **Overall ratings** of quality and customer service combined are most positive for accommodation and attractions which received 'excellent' or 'good' ratings from more than 90% of visitors compared with restaurants/cafes/pubs (82%), TICs (76%) and shops (71%).

1.23 Negative ratings were not common but were highest in hospitality (5%), TICs and shops (3%). A quarter of visitors rated shops as 'neither good nor poor' suggesting no strong views either way and a fifth (18%) said the same of TICs.

1.24 Overall, the visit experience is good - 48% of visitors said it exceeded their expectations and 51% said it met them. The majority of visitors (78%) are very likely to recommend the area with a further 19% likely to do so.

Natural environment most memorable

1.25 The Brecon Beacons is memorable for a wide range of experiences. The most common aspects mentioned by visitors are the landscape, scenery and natural environment (43%), walks (26%), peace and tranquillity (14%), specific natural sites such as Pen y Fan, Sugar Loaf and the Waterfalls (14%), accommodation (13%) and the friendliness of the people in the area (10%). Food and drink are mentioned by 7%, the waterfalls were mentioned specifically by 4% and the canals by 3%.

Areas for improvement

1.26 In terms of improving the area to make visits more enjoyable, around 70% of visitors made no comment, said nothing could be improved or suggested that better weather was the only thing they would change. Where practical suggestions were made, the key areas for improvement include:

- The 'eating out' experience in terms of the quality, range and availability of food and drink.
- Transport, roads, parking and signage – including better road signs and signage in general, way markers on paths, path maintenance, bus services and accurate information about services, availability of car parking/pricing.
- Improvements in accommodation such as the availability of smaller campsites, improved facilities and equipment, cleanliness and maintenance of accommodation.
- Availability of appropriate and accurate visitor information such as local transport information, more walking and biking maps, better service and information through TICs.

- Shopping and also the image of town centres such as Brecon were considered by some to be lacking in variety and in need of an 'update'. Several commented on the number of closed shops.
- Cleanliness and maintenance of toilets and the removal of litter from car parks, villages, roadsides and footpaths. Some commented on overgrown footpaths.

Visitor profile

1.27 A range of visitor group types responded to the survey. Two fifths were couples (42%) and almost a third were families with children (31%). 6% visited the area alone and the remaining fifth (21%) include families without children, friends, tour groups or other types of party.

1.28 The average party size was 3.5 people and party size ranged from 1 to 50 people. The average party size of overnight visitors is the same but is slightly lower for day visitors (3 people). Families with children have an average group size of 5.1 people.

1.29 Respondent age groups vary widely although those aged 55+ make up a third of overnight visitors (34%) and a quarter of day visitors (23%). Half of overnight visitor respondents (51%) are 35-54 rising to 57% for day visitors.

1.30 A high proportion of overnight visitors (82%) are from England but the majority of day visitors (74%) are from Wales. English overnight visitors come from the South East (25%), Midlands (14%), South West (14%) and London (11%).

1.31 Day visitors from England hale from the Midlands (38%), South West (25%), South East (13%) and the Cotswolds (13%).

1.32 7% of visitors come from overseas and the most common countries of origin are the Netherlands (35%), Germany (13%), USA (10%) and Belgium (10%).

Non visitor feedback

1.33 Non-visitors have taken holidays or short breaks to alternative destinations including Europe (33%), Wales (28%), Devon & Cornwall (26%), Lake District/Cumbria (16%) and the South Coast (16%).

1.34 A quarter of non-visitors say that they intend to visit the Brecon Beacons but have not yet done so (24%), and a similar proportion have not considered the area (23%). Others comment that they had already booked a trip elsewhere (17%) and the same proportion said that they didn't have time to visit.

1.35 40% of those who have not yet visited said that they definitely intend to in the next 12 months with a further 35% suggesting that they might do.

2. Survey Background and Method

Background and Method

2.1 This Brecon Beacons visitor survey has been live since August 2012 the results cover responses up to early October 2013.

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 1469 responses gathered through the same online questionnaires but gathered 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	528	97%	3%
Brecon Beacons Holiday Cottages	**Link** sent as part of post-visit communications to customers renting accommodation from BBHC	677	99%	1%
Open survey	www.breconbeaconssurvey.co.uk and promoted via social media	264	59%	41%
	Total	**1469**	**92%**	**8%**

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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.

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 110 responses) the proportion of day visitor interviews is relatively low compared to the overall.

Analysis

2.7 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.

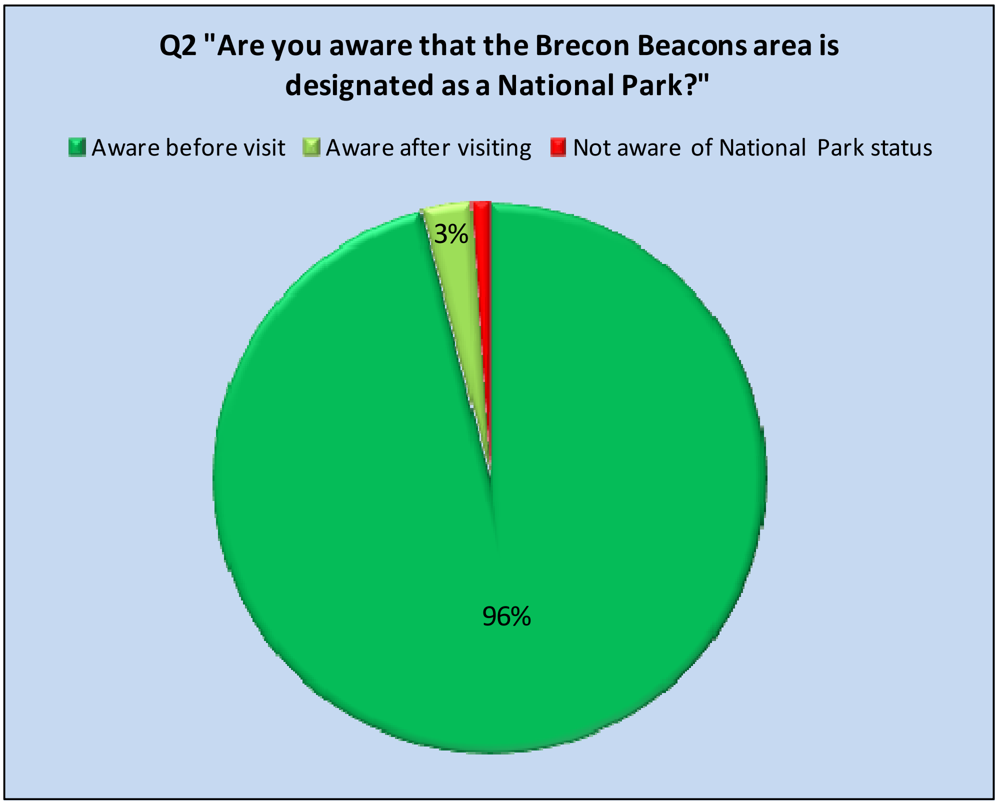
2.8 Some questions allowed more than one response and in these circumstances percentages will not add up to 100%. In other cases, percentages will not total 100% due to rounding.

3. Survey Findings

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

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.

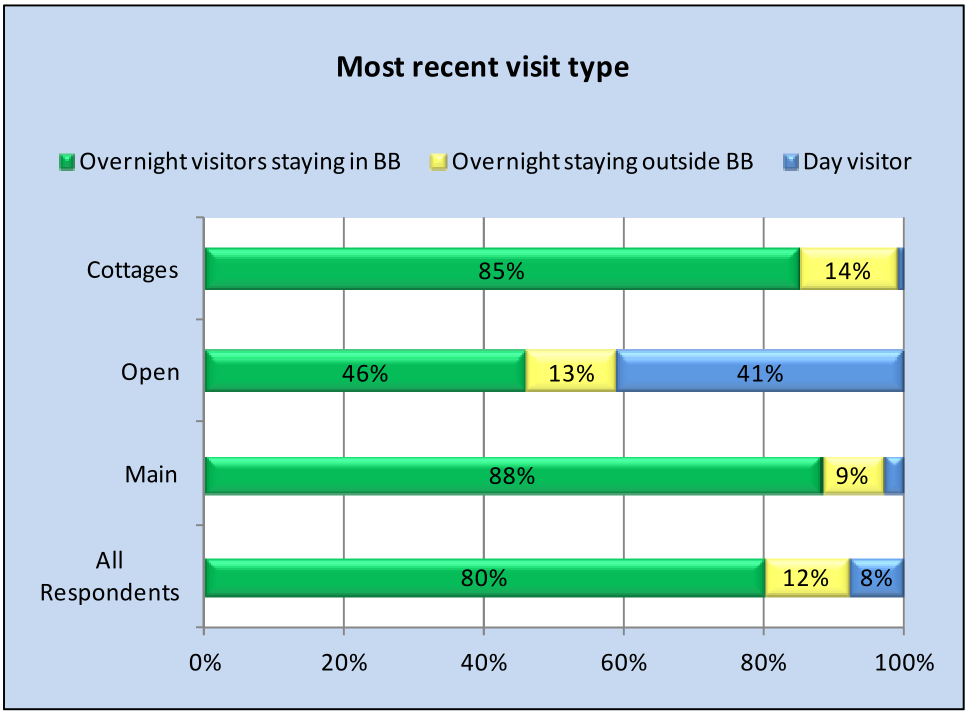
High awareness of National Park status



Base: 1383 Visitor Respondents

3.3 Awareness of National Park designation is almost universal with almost all visitors aware of this before their visit (96%), 3% aware after their visit and just 1% not aware. Families with children are the group with least awareness of National Park designation ahead of their visit (94%).

Overnight and day visitor feedback



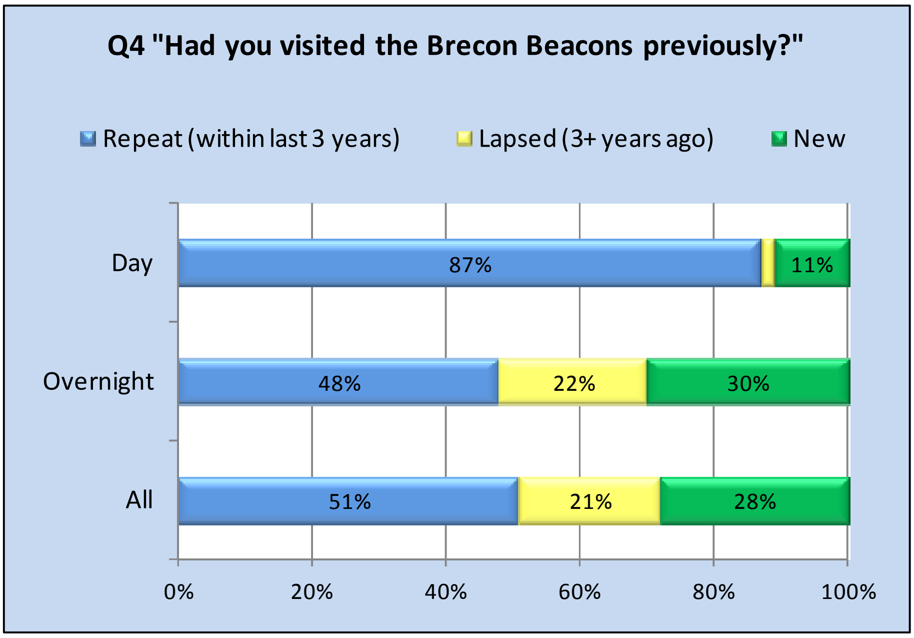
Base: 1366 Visitor Respondents

3.4 80% of visitors were staying overnight in the Brecon Beacons, 12% were staying outside of the area and 8% came from home for the day.

3.5 In this year's survey, one aim was to improve the number of respondents from the day visitor market and this has been achieved primarily through the 'Open' survey hosted at www.breconbeaconsurvey.co.uk. More than two in five (41%) of those responding through this link were day visitors to the area.

3.6 Around a fifth of those visiting alone (22%) came for the day which is particularly high compared with 6% of couples, 7% of families with children and 8% of all visitors.

Not just repeat visitors



Base: 1374 Visitor Respondents

3.7 Visit history is mixed amongst overnight visitors, with is a strong pattern of repeat visits to the area (48%), but it is encouraging that both new and lapsed visitors are also being attracted to the area.

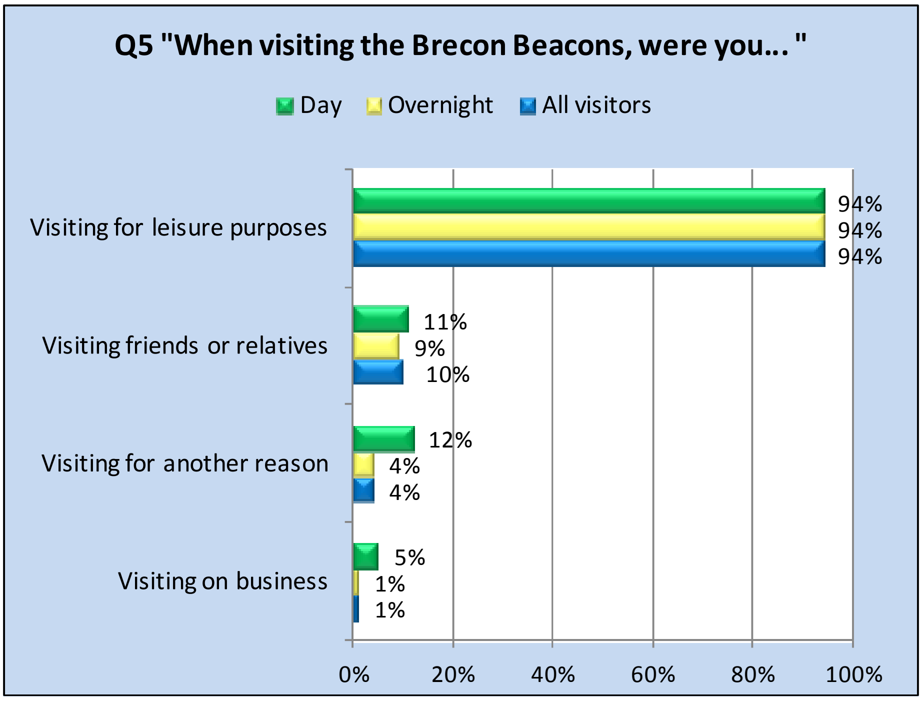
3.8 New and lapsed visitors are less common amongst day visitors (13%) as most have visited previously within the last three years.

3.9 New visits to the area are highest amongst couples (34%) compared to around a fifth of those visiting alone (21%), a quarter of families with children (25%) and 28% of all visitors.

"All in all my partner and I fall more and more in love with the place on each visit to the point that we are seriously considering moving to the place."

"Like the Welsh we were very lucky with the weather. We were in Wales for the first time, for three weeks in total, and had in total three days of rain. Furthermore we thoroughly enjoyed the scenery, the pretty villages, the history, the teas, the friendliness. Never a dull moment."

Mainly leisure visitors



Base: 1374 Visitor Respondents

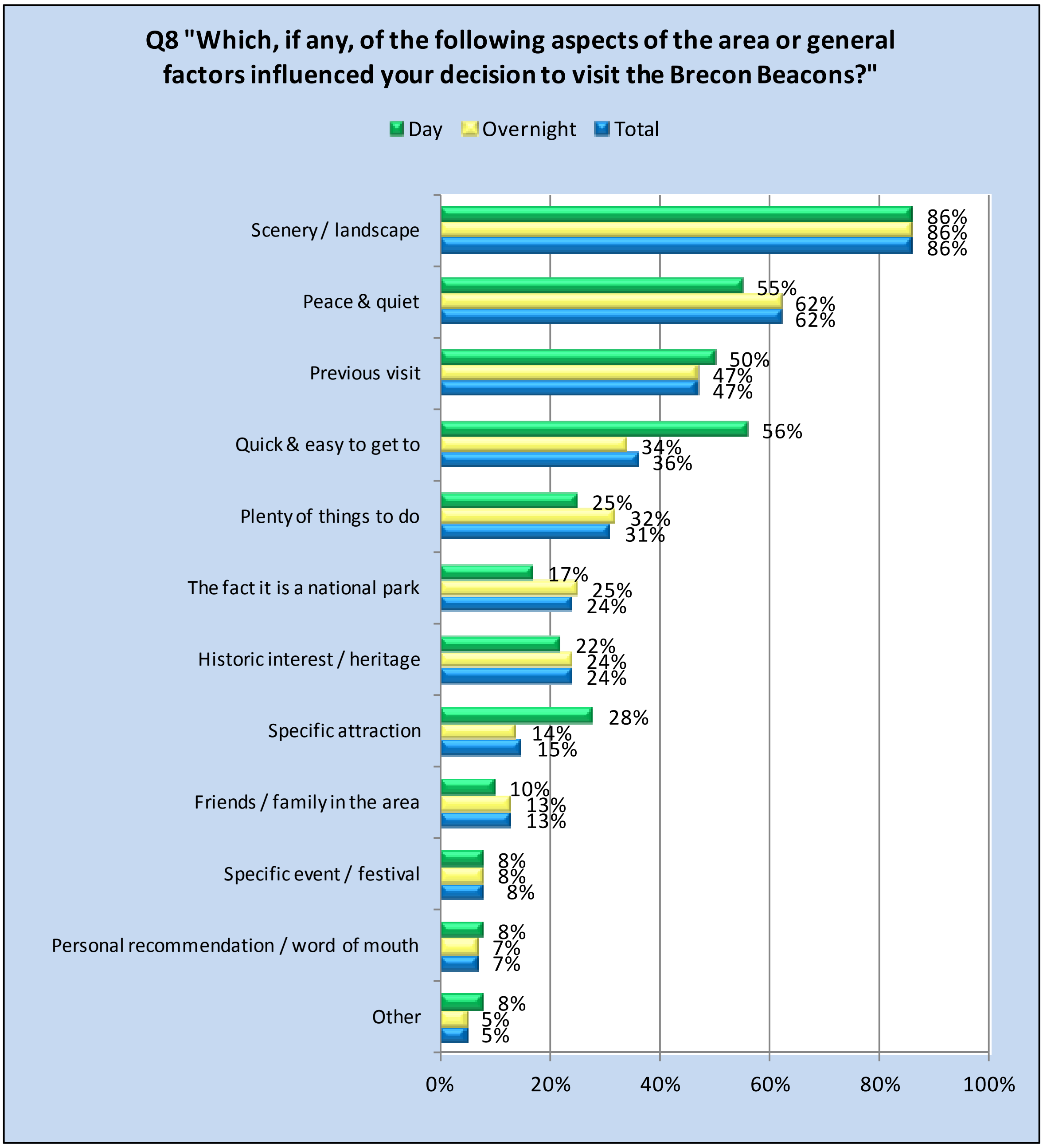
3.10 Respondents were able to give more than one response to this question.

3.11 Most visitors came for leisure purposes (94%), 10% were visiting friends or relatives, 1% on business and 4% for another reason. There is little variation amongst day or overnight visitors.

3.12 Visits to friends and relatives are highest amongst families with children (13%), lone visitors (14%) and repeat visitors (13%) compared to 10% overall. In contrast, just 5% of new visitors were visiting friends and relatives suggesting that there is perhaps less ‘connection’ with the area making marketing and recommendations particularly important to attract future new visitors.

3.13 Business visits are also highest amongst lone visitors (7%) compared to 1% overall.

What influences the decision to visit?



Base: 1379 Visitor Respondents

3.14 Decisions to visit a destination often involve more than one influencing factor. Respondents were asked to list one or more aspects of the area which contributed to their decision to visit the area.

3.15 The pattern is similar amongst day and overnight visitors in that 'scenery & landscape' is the mentioned most frequently (86%) but there are some variations.

3.16 Over half of day visitors (56%) took a trip because the area is 'quick and easy to get to' and this is ranked second highest, but is less important for overnight visitors (34%). Specific attractions influenced just over a quarter of day visitors (28%) compared with 14% of overnight visitors.

3.17 Previous visits influence around half of day and overnight visitors to take a trip. Where the last visit was within the last three years, almost three quarters of visitors (74%) say that a previous visit influenced their decision compared with 45% amongst lapsed visitors.

3.18 Having friends and family in the area has a slightly greater influence on the decision to visit for repeat visitors (17%) compared to 13% overall.

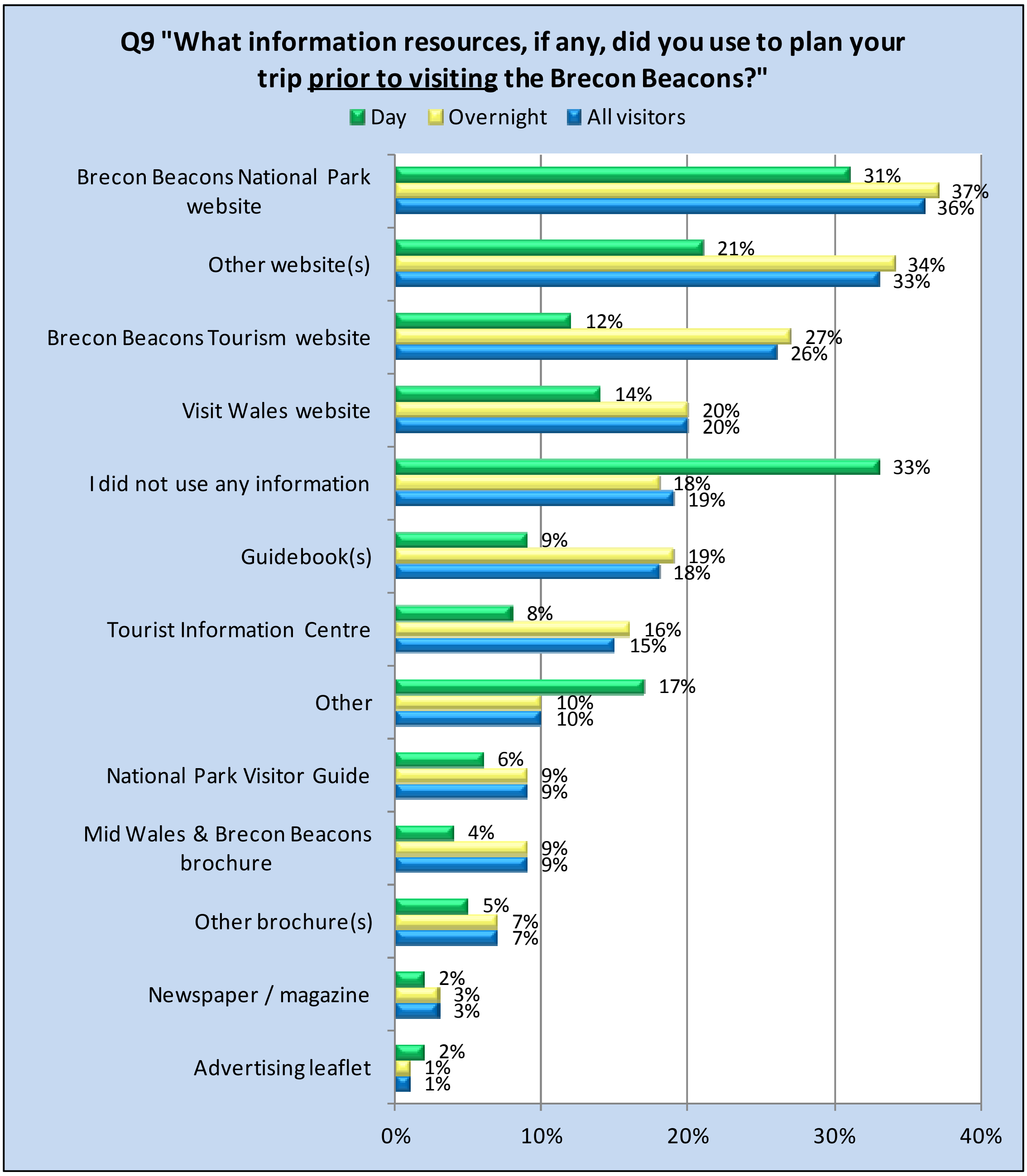
3.19 Personal recommendations are mentioned by 7% of visitors as a motivating factor but amongst new visitors, this is more than double (15%) pointing to the importance of advocacy in the decision making process.

3.20 One in three new visitors (34%) also highlight national park status as a key factor in their decision to visit compared to 24% overall.

3.21 Two in five (40%) of those visiting in families with children said that having plenty of things to do was a factor compared to 31% overall. Historic interest and heritage is also slightly more influential for this group (29%) compared to 24% overall.

3.22 Lone visitors are particularly influenced by the peace and quiet (74%), a previous visit (57%), historic interest and heritage (29%) and specific attractions (24%).

Online visitor information popular before visiting



Base: 1365 Visitor Respondents

3.23 The use of visitor information to plan a trip is more often used by overnight rather than day visitors. However, a fifth of visitors do not use information to plan a trip (19%), particularly day visitors (33%).

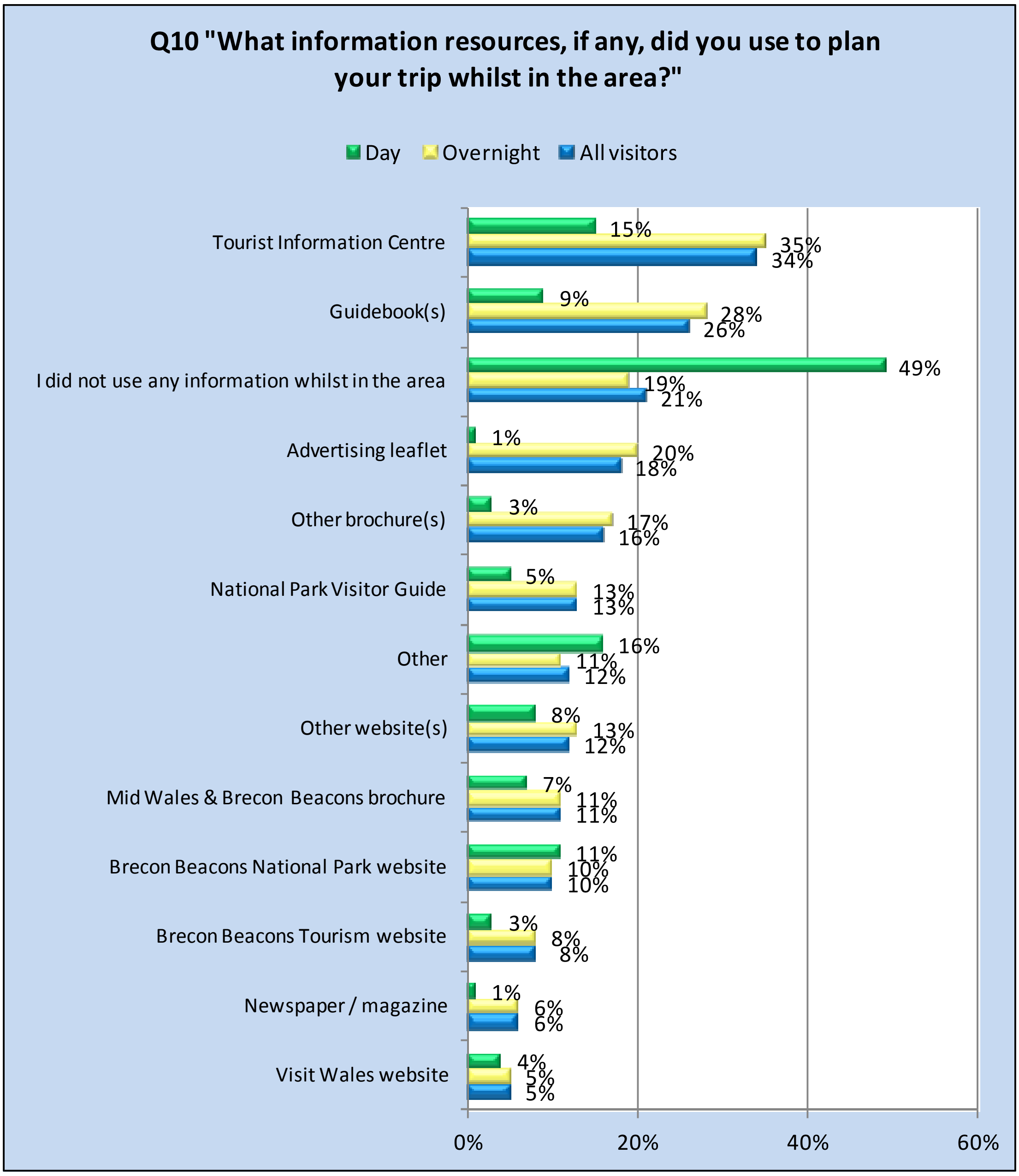
3.24 The most popular resources are online. The National Park website is the most common source of information to plan a trip (36%) and is also relatively well used amongst day visitors (31%). Other popular information sources include 'other websites' (33%), the Brecon Beacons Tourism website (26%) and the Visit Wales website (20%) - all mentioned more frequently by overnight visitors.

3.25 The National Park website is used consistently across groups of visitors (36-39%) with the exception of lone visitors (25%) although a higher proportion of lone visitors do not use any visitor information to plan a visit (27%).

3.26 New visitors make greater use of the key websites which provide visitor information on the area, particularly the National Park website (46%) but also the Brecon Beacons Tourism website (36%) and the Visit Wales website (26%).

3.27 Offline resources are still used but to a lesser extent prior to the visit compared with online information. Guidebooks are used by around one in five visitors (18%) and slightly more amongst new visitors (22%). Other offline resources include TICs (15%) and ‘other’ resources such as maps (10%).

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



Base: 1345 Visitor Respondents

3.28 Visitor information **during** a visit is used more by overnight visitors (81%) than day visitors (51%) but there is a preference for offline information.

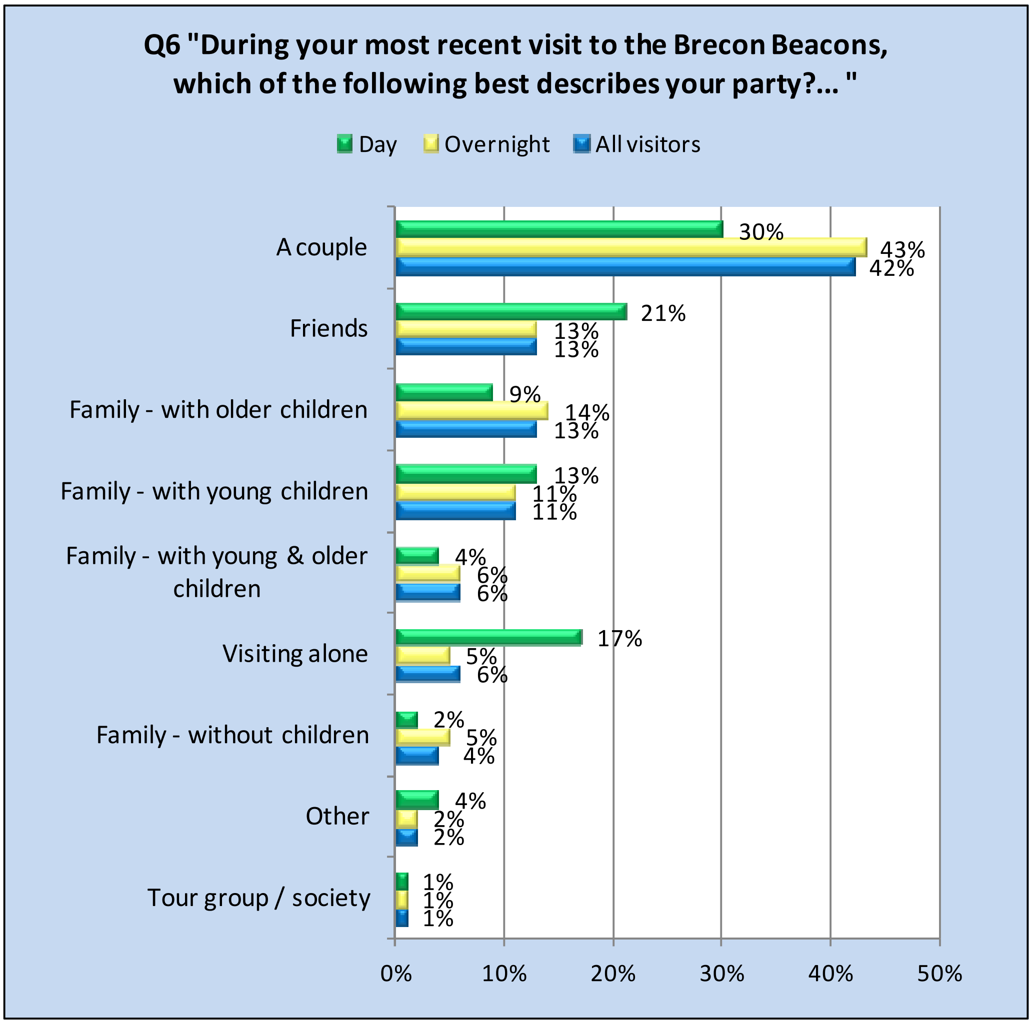
3.29 TICs are mentioned most (34%) and particularly amongst new visitors (41%) and overseas visitors (46%) but less so amongst day visitors (15%) and people already based in Wales (26%) who are likely to have better local knowledge.

3.30 Guidebooks are also used by a quarter (26%) and particularly amongst visitors from outside of Wales and new visitors (32%).

3.31 The National Park website is used during the trip by around one in ten visitors (10%) irrespective of whether for day or overnight visits. One in eight overseas visitors (13%) used the site (Welsh-based visitors (9%) and

3.32 The BBT website is also used by around one in ten visitors during their visit with slightly higher use by overseas visitors (14%) and less so by those based in Wales (6%).

Popular with couples and families with children



Base: 1383 Visitor Respondents

3.33 A range of visitor group types were represented in the survey and there is some variation in the characteristics of day and overnight visitor groups.

3.34 Two fifths of visitors were couples (42%) but this drops to just under a third for day visitors (30%). 51% of new visitors were couples.

3.35 There is interest in attracting families with children to the Brecon Beacons and almost a third of overnight visitor respondents are in this category (31%) with a slightly lower proportion of day visitors (26%). Almost two fifths of lapsed visitors (37%) were families with children compared with 28% of new visitors.

3.36 Groups of friends make up around a fifth (21%) of day visitor respondents but make up a lower proportion of overnight groups (13%).

3.37 One in twenty respondents (6%) visited the area alone but this is closer to a fifth of day visitor respondents (17%).

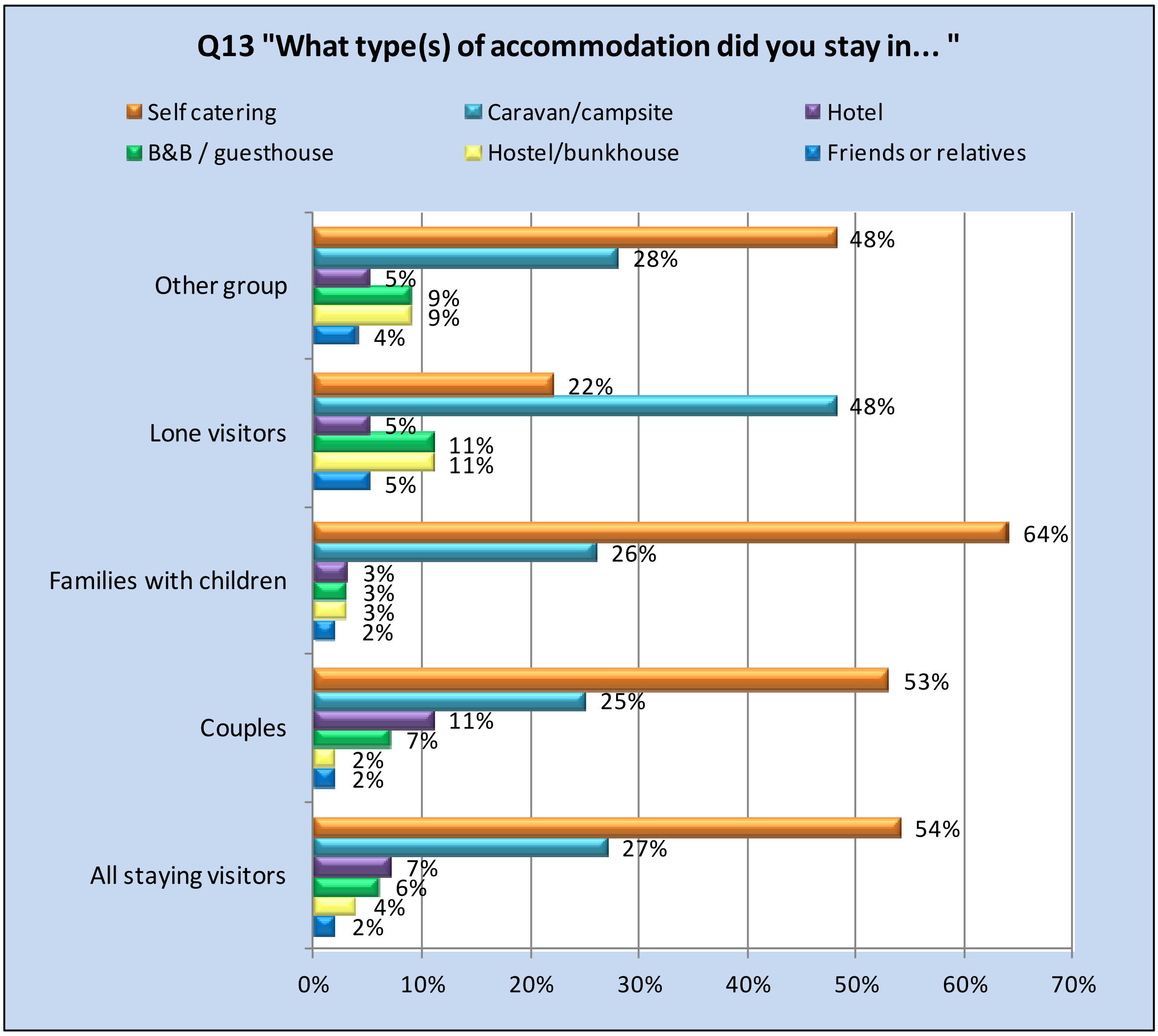
3.38 The average party size was 3.5 people and party size ranged from 1 to 50 people. The average party size of overnight visitors is the same but is slightly lower for day visitors (3 people). Families with children have an average group size of 5.1 people.

Length of Stay

3.39 Overnight visitors stayed for an average of 4.9 nights with the longest stays in self-catering accommodation (6.4 nights) but shorter breaks in B&Bs (3.7 nights) and on caravan/campsites (3.5 nights).

3.40 The shortest stays were in hotels and hostels/bunkhouses which were both 2.8 nights on average. Stays with friends and relatives lasted around 3.1 nights.

Non-serviced accommodation popular



Base: 1253, Overnight Visitor Respondents

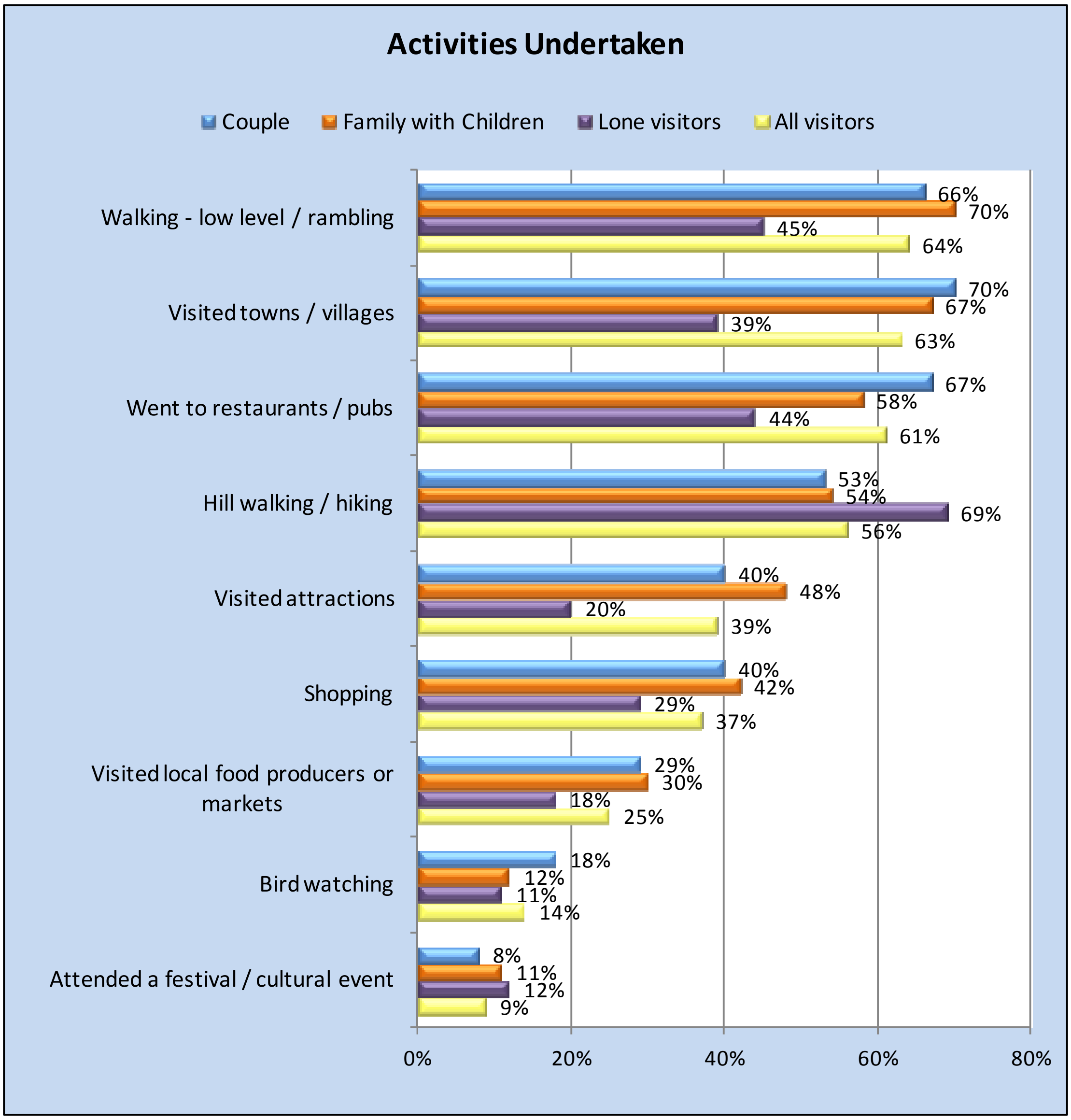
3.41 Non-serviced accommodation is most popular amongst respondents. The majority of staying visitors used self catering accommodation (54%) and caravan/campsites (27%). 7% stayed in hotels and 6% in B&B or guesthouse accommodation.

3.42 Families with children were most likely to stay in self-catering accommodation (64%) whilst lone visitors preferred caravan/campsites (48%).

3.43 Almost half respondents originating from Wales (46%) stayed in caravan/campsite accommodation compared with 27% overall whilst overseas visitors used this least of all (14%).

3.44 Serviced accommodation is more popular with overseas visitors. Almost a fifth of overseas visitors (16%) stayed in B&Bs and guesthouses compared with 6% overall and 12% in hotels compared to 7% overall.

Activities whilst in the area



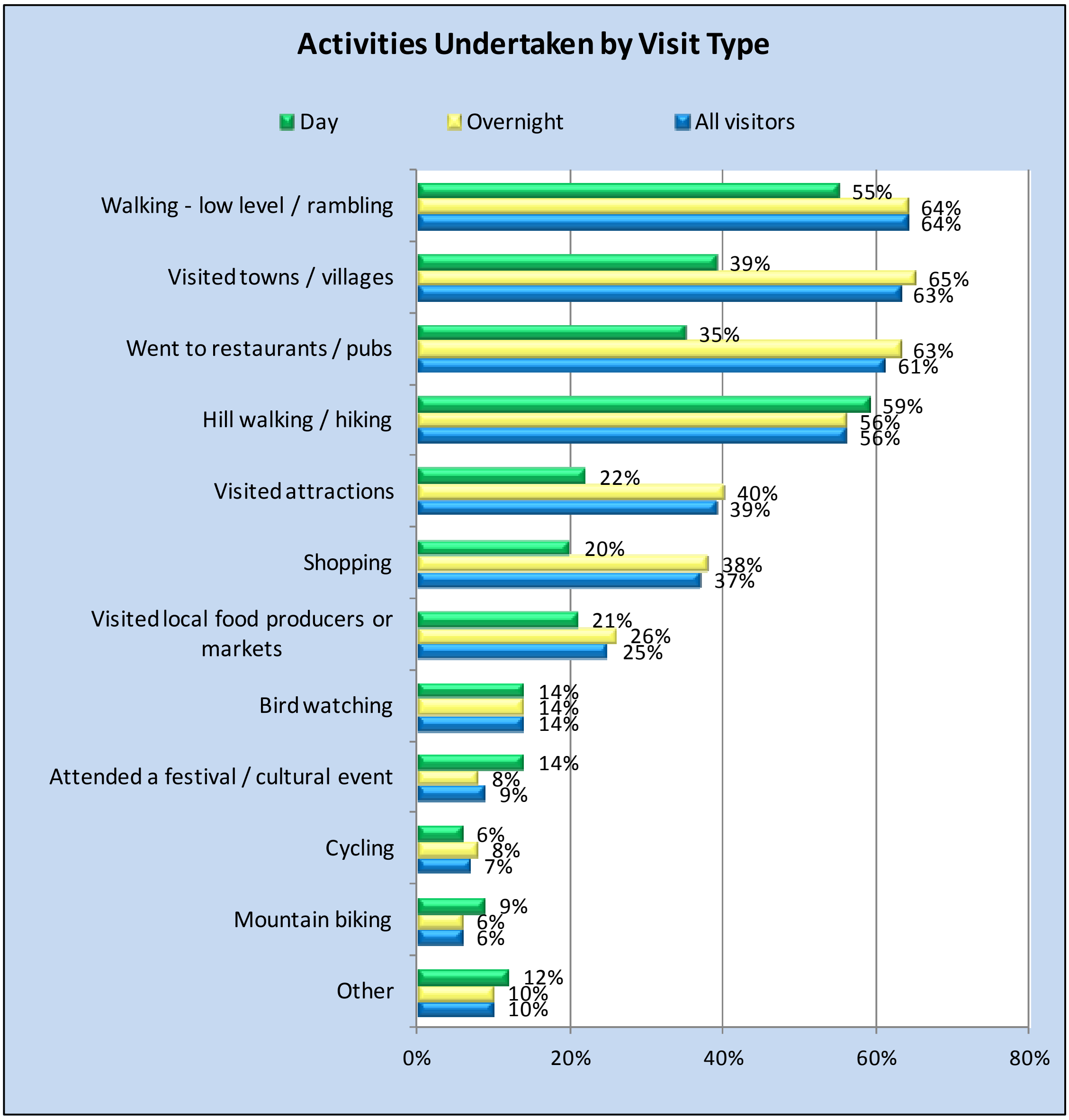
Base: 1379 Visitor Respondents

3.45 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.

3.46 To make the chart easier to read, activities with lower scores have been omitted. These included cycling (7%), mountain biking (6%), fishing (3%) and creative activities (2%). 1% of visitors said they did not do any activities on their visit.

3.47 The chart shows the activities by visitor group. The most popular activities for couples were visiting towns and villages (70%), eating out in restaurants/pubs (67%) and low level walking (66%). Families with children are also interested in these activities but also in visiting attractions (48%) compared to 39% overall.

3.48 Lone visitors are most interested in hill walking/hiking (69%) and to a lesser extent low level walking (45%), pubs and restaurants (44%) and visiting towns/villages (39%).



Base: 1379 Visitor Respondents

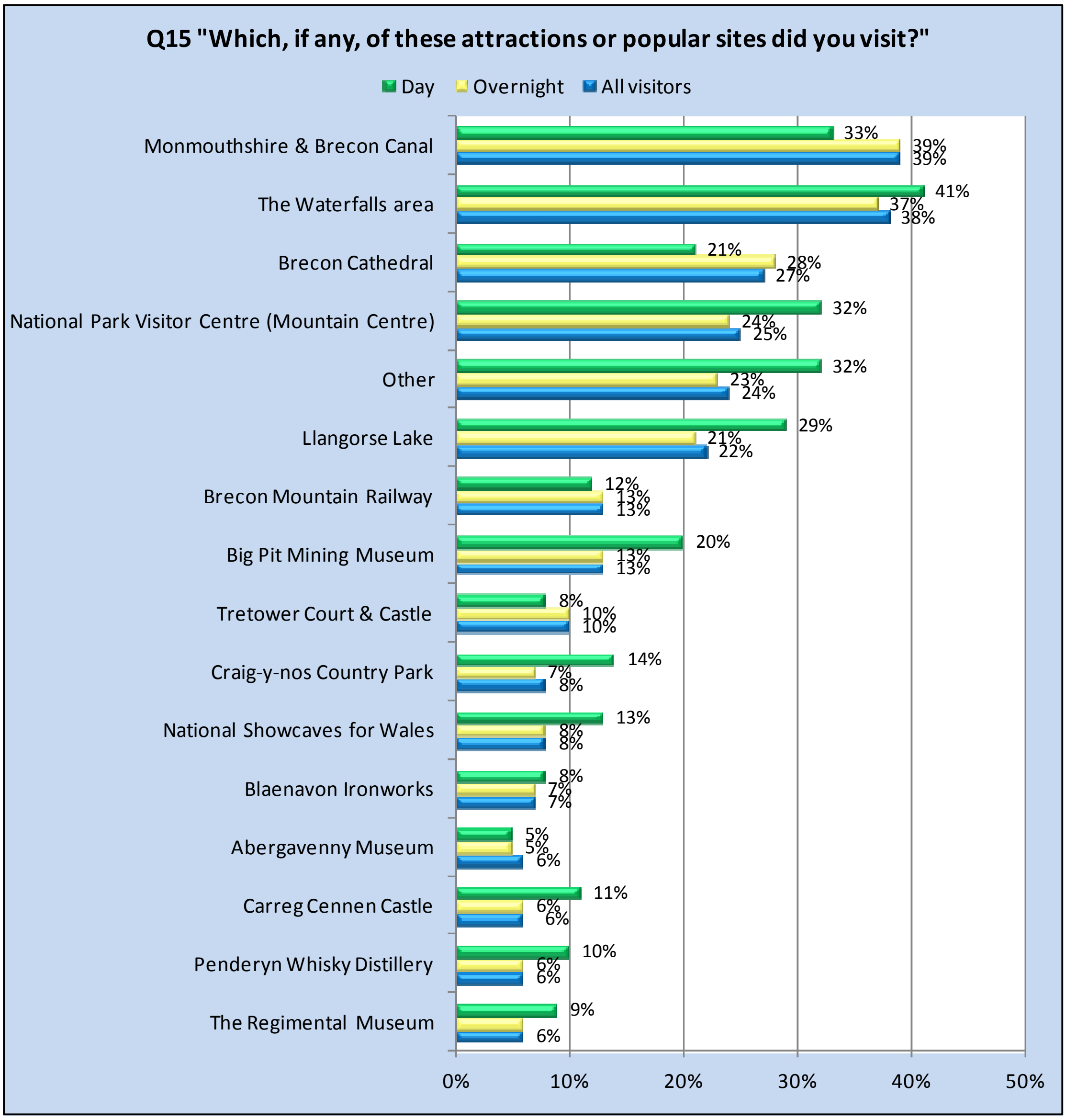
3.49 Differences in the activities undertaken by day and overnight visitors are shown above.

3.50 Outdoor activities such as hill walking/hiking (59%) and low level walking (55%) were most popular with day visitors. Day visitors mention visiting towns and villages (39%) and eating out in restaurants/pubs (35%) but these are more popular amongst staying visitors which will be largely due to the length of time spent in the area.

3.51 Around a fifth of day visitors went shopping or visited attractions which is almost half compared to staying visitors. There is more interest in attending festivals/cultural events (14%) and mountain biking (9%) amongst day visitors.

3.52 New visitors undertake more activities than lapsed or previous visitors and this will be partly due to their desire to explore an area that is new to them. The most popular activities for new visitors are visiting towns and villages (74%), low level walking or rambling (69%) and going to restaurants or pubs (63%) but they are also more interested in visiting attractions (47%).

Visiting attractions and popular sites



Base: 1149 Visitor Respondents

3.53 Brecon Beacons covers a large area and has an extensive number of sites and attractions. Respondents could select one or more response to reflect the attractions visited. The chart shows those which were visited by 6% or more respondents but a full list is provided in the table below.

3.54 The most popular attractions or sites visited include the Monmouthshire & Brecon Canal (39%), the Waterfalls area (38%), Brecon Cathedral (27%), National Park Visitor Centre (25%) and Llangorse Lake (22%).

3.55 Above average numbers of **new visitors** went to the Waterfalls area (43%), Brecon Cathedral (35%), the Mountain Centre (30%) and Brecon Mountain Railway (18%). Almost two fifths (38%) visited the Canal, in line with other types of respondent.

Attractions or Sites visited by Group Type					
Attraction or site	**All visitors**	**Couples**	**Families with children**	**Lone visitors**	**Other group**
Monmouthshire & Brecon Canal	39%	45%	34%	30%	33%
The Waterfalls area	38%	35%	43%	32%	36%
Brecon Cathedral	27%	31%	23%	36%	22%
National Park Visitor Centre	25%	24%	28%	24%	21%
Llangorse Lake	22%	23%	24%	15%	20%
Big Pit Mining Museum	13%	13%	14%	14%	13%
Brecon Mountain Railway	13%	13%	15%	6%	12%
Tretower Court & Castle	10%	12%	10%	9%	4%
National Showcaves for Wales	8%	7%	14%	6%	2%
Craig-y-nos Country Park	8%	7%	9%	12%	7%
Blaenavon Ironworks	7%	7%	8%	3%	6%
The Regimental Museum	6%	8%	6%	6%	4%
Penderyn Whisky Distillery	6%	8%	5%	6%	6%
Carreg Cennen Castle	6%	5%	8%	9%	4%
Abergavenny Museum	6%	7%	5%	5%	3%
Cantref Adventure Farm	4%	1%	8%	5%	2%
Dinefwr	4%	4%	3%	5%	3%
Garwnant	3%	2%	4%	6%	3%
Llangorse Rope & Activity Centre	3%	1%	6%	5%	2%
Brecknock Museum	1%	1%	1%	3%	0%
Other	24%	24%	21%	29%	27%
Base	*1149*	*505*	*365*	*66*	*213*

3.56 Due to the number attractions and sites involved, data on visits by group type is provided in the table above. The highlighted areas show attractions or sites which had significantly above average visits for each group.

3.57 Two fifths of families with children visited the Waterfalls area (43%) compared with 38% overall. This group also made more visits to the National Park Visitor Centre (28%) and the National Showcaves (14%).

3.58 Just under a half of couples (45%) visited the Canal and around a third visited the Waterfalls area (35%) and the Cathedral (31%).

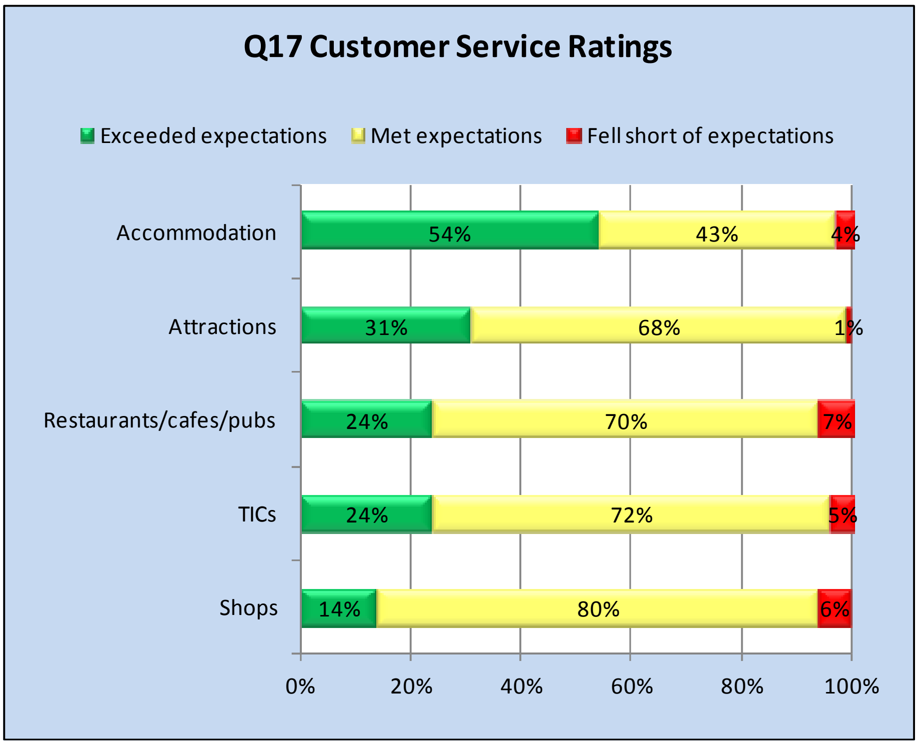
3.59 More than a third of those visiting alone (36%) went to the Cathedral and this was their most popular attraction followed by the Waterfalls area (32%) and the Canal (30%).

Satisfaction ratings versus expectations

3.60 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.

3.61 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; 790-1250 Visitor Respondents

3.62 Expectation about customer service are either met or exceeded in most aspects of visits but accommodation receives the best ratings with 54% of visitors indicating that their expectations were exceeded compared with 31% for attractions, 24% for TICs and restaurants/cafes/pubs and 14% of shops.

"All the locals were extremely friendly and helpful. We received great, personal service in all places."

"Staff at the tourist information centre were fantastic as well, recommending other areas to visit as well as the main attractions for walkers like myself."

"Having such wonderful accommodation to accommodate the whole family .the people we rented from were so helpful and friendly."

3.63 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 (7%), shops (6%), TICs (5%) and accommodation (4%).

"In some of the larger hotels, service was a bit slow at times, though food was very good."

"Tourist Information were not very well informed about walking routes from the town centre."

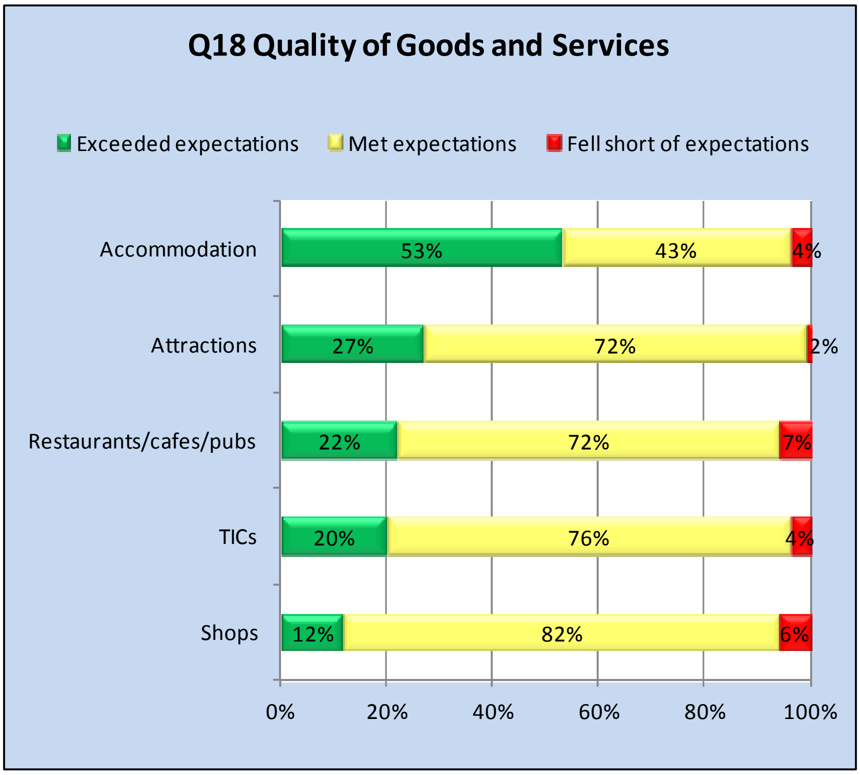
"The welcome in [the] Tourist Office was deplorable we asked for advice about B&Bs and were told to choose from a photo!!! .... that welcome...gave us a very bad start and disagreeable impression to begin our stay - and indeed we moved two days later to Crickhowell, where the old ladies & gents, working for nothing, were much nicer and more helpful."

3.64 Leaving a good impression, particularly for those new to the area, is important in encouraging recommendations either through word of mouth or increasingly through 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.

3.65 One in fourteen **new visitors** said that the customer service in restaurants/cafes or pubs (7%) was below expectations and 10% of **lapsed visitors** said the same suggesting that there may have been a decline in the level of customer service since a previous visit. Negative ratings were highest amongst couples (9%) and lone visitors (8%).

3.66 One in twenty new visitors also said that TICs (6%) and accommodation (5%) fell short of their expectations.

Quality of goods or services generally meets expectations



Base: Varies according to rating; 726-1198 Visitor Respondents

3.67 In terms of the **quality** of goods and services, the results follow a similar pattern with expectations exceeded in accommodation (53%) and attractions (27%), but less so with restaurants/cafes/pubs (22%) and TICs (20%).

3.68 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%).

3.69 The number of respondents who said that the quality of goods and services fell below expectation is relatively low but still evident for restaurants/cafes/pubs (7%), shops (6%), TICs and accommodation (4%) and attractions (2%).

3.70 10% of lapsed visitors said that the quality of restaurants/cafes and pubs fell below expectations and this is echoed in some of the later comments from respondents. Likewise, 6% of new visitors were unhappy with good and services in TIC.

3.71 The shopping experience is also below expectation in terms of quality for 8% of lapsed visitors and 7% of new visitors. Several respondents comment on the ambience of the towns, the limited range of goods and their desire for more ‘independent’ outlets selling something a bit different to the high street.

“Brecon town centre disappointing - feels run down, nothing there to encourage you to stay and browse.”

"Disappointment that some of the small towns are quite run down and since our last visit about 7 years ago some galleries and antique shops (our other interests as well as walking) have closed down."

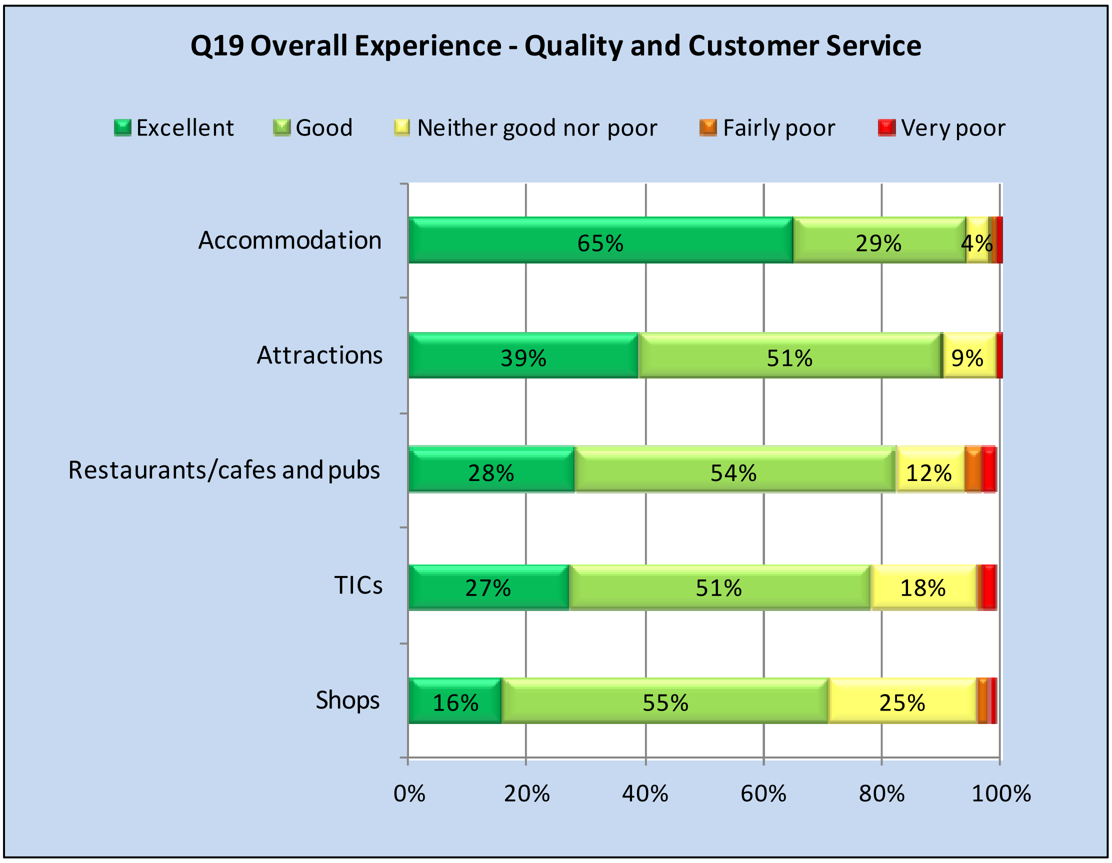
"Some of the towns we visited felt quite run down, not as many foodie shops as I expected, delis etc."

"Brecon needs better pubs/eating places/shops.0

"Better pub meals, especially given the high quality of local produce that can be bought at markets and Farm Shops (e.g. the Welsh Venison Centre). Whilst there are some good pubs the standard of food and drink can be disappointing, e.g. no decent ales, just bog-standard big name lagers and Worthington Creamflow; ales badly kept; indifferently prepared pub grub at inflated prices."

"More detailed walking leaflets at the Visitor Information Centres, several walks we did not do because we couldn't find the location."

Overall experience ratings generally very positive



Base: Varies according to rating; 726-1198 Visitor Respondents

3.72 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.

3.73 The overall ratings are most positive for accommodation and attractions which received ‘excellent’ or ‘good’ ratings from more than 90% of visitors compared with restaurants/cafes/pubs (82%), TICs (76%) and shops (71%).

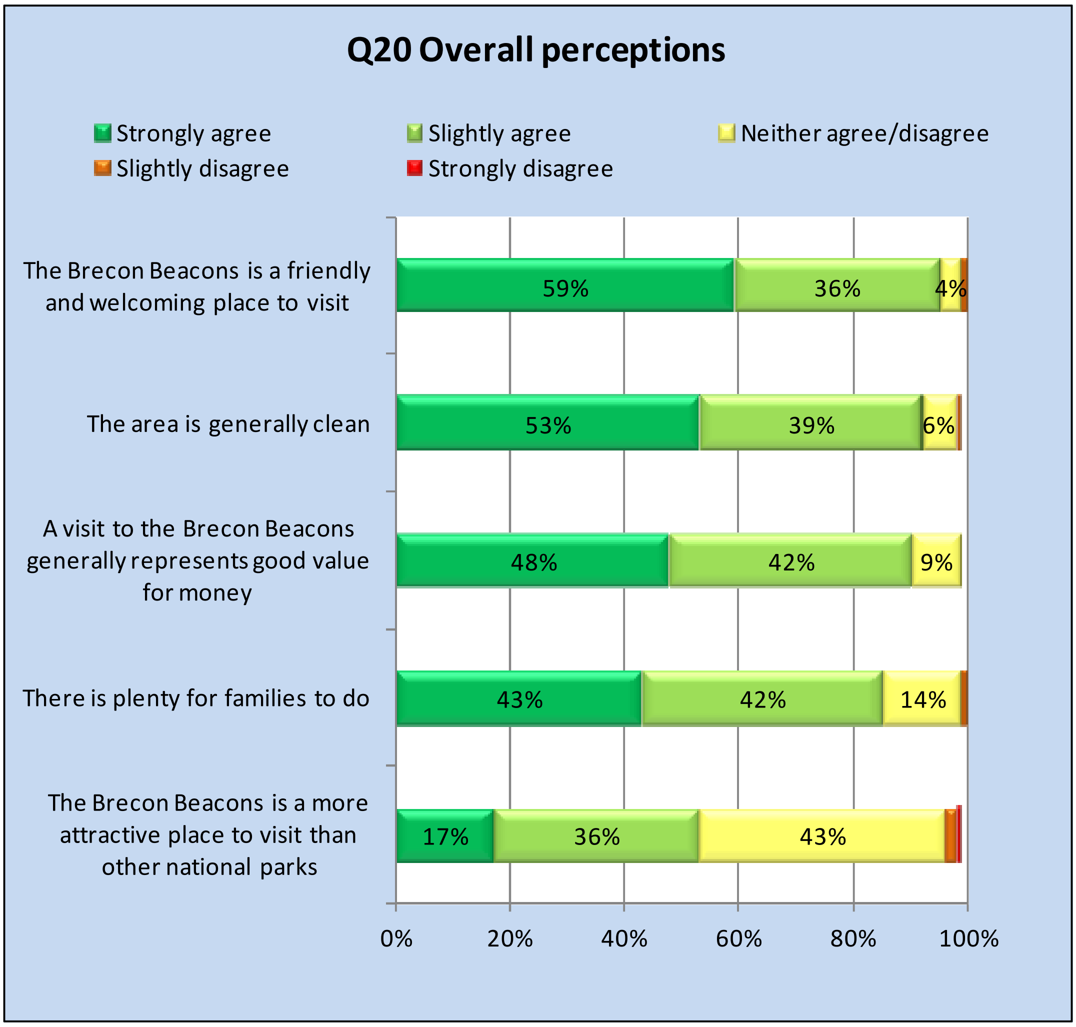
3.74 Negative ratings were not common but were highest in hospitality (5%), TICs and shops (3%). A quarter of visitors rated shops as ‘neither good nor poor’ suggesting no strong views either way and a fifth (18%) said the same of TICs. This suggests that the shopping and TIC experiences are not particularly memorable and could be potentially used more to make more of an impact on visitors.

3.75 Again, any negative experiences do not have a significant impact on overall ratings but should be considered and addressed, where possible. These are highest for food and drink outlets (5%) and slightly more for lapsed visitors (6%) and couples (7%). Overall negative feedback on TICs is slightly higher amongst couples (5%) and new visitors (4%).

Perceptions of the area

3.76 The impressions visitors have of a destination influence potential recommendations to family, friends and colleagues.

3.77 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, cleanliness and attractiveness as a national park.



Base: Varies according to rating; 1135-1297 Visitor Respondents

3.78 Perceptions of the area are good overall, with the best ratings for the 'welcome' visitors receive (95% positive) and cleanliness (92%). Negative opinions are few and far between and mainly relate to attractiveness compared to other national parks (3% negative).

Lots for families to do

3.79 Over half (52%) of those travelling in family groups with children 'strongly agreed' that there is **plenty for families to do** with a further 39% 'slightly agreeing' (91% positive). Just 1% disagreed and the remaining 8% had no strong opinion either way. These ratings are better than average where 85% slightly or strongly agree - other groups have more neutral responses possibly reflecting lack of experience of these types of activities. However, it is encouraging that those with the most relevant experience of family activities give a positive response.

"Range of active things to do as a family, scenery, wonderful campsite on river close to Brecon."

"Beautiful landscape with an excellent variety of activities which catered for everyone."

Cleanliness is generally good

3.80 Cleanliness in the area is generally good with only a few respondents suggesting otherwise but some visitor groups are more positive than others.

3.81 Almost six in ten new visitors (59%) strongly agree that the area is generally clean compared with 53% overall and just under half of lapsed visitors (49%). Visitors from Wales and London & South East are most positive about the cleanliness of the area (60% and 57% respectively strongly agree).

Best aspect of visit: *"Walking the hills, valleys and rivers. Why? Quiet, clean, and beautiful."*

Visitors feel a strong sense of welcome

3.82 Almost all visitors feel that the Brecon Beacons is a friendly and welcoming place to visit (95%) and almost six in ten (59%) strongly agree.

3.83 There are slight variations by location with visitors from London & South East feeling most welcome (63% 'strongly agree') compared to those from Wales (60%), South West/M4 corridor (57%), overseas (58%) and other areas of England/Scotland slightly lower (56%).

3.84 Lapsed visitors are a little less enthusiastic about the welcome they received (53% strongly agree).

"Beautiful scenery and welcoming and friendly people."

"The people are very welcoming and friendly and always have a smile for you. This happy demeanour makes the sun shine even though it rains and rains and rains."

Value for money, especially for previous visitors

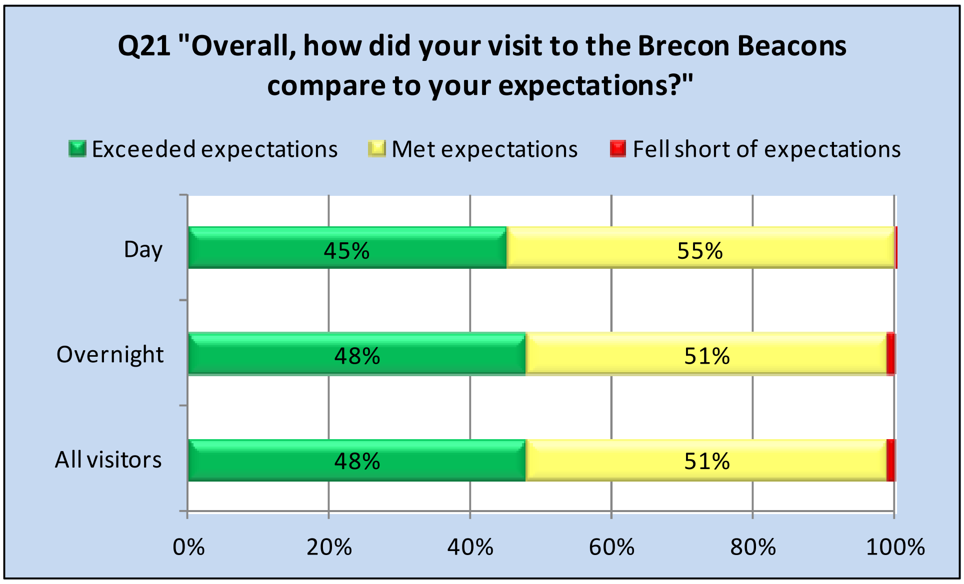
3.85 The area is generally considered to be good value for money with nine in ten agreeing (90%) including strong agreement from around half of all visitors (48%).

"Friendly pubs with good value food."

"County Show was great value and a brilliant day out."

3.86 Previous visitors are the most positive about value for money (54% strongly agree) but there are slightly lower ratings from new visitors (43%) and 2% actually disagreed that the area is generally good value for money.

Experience exceeds expectations for many



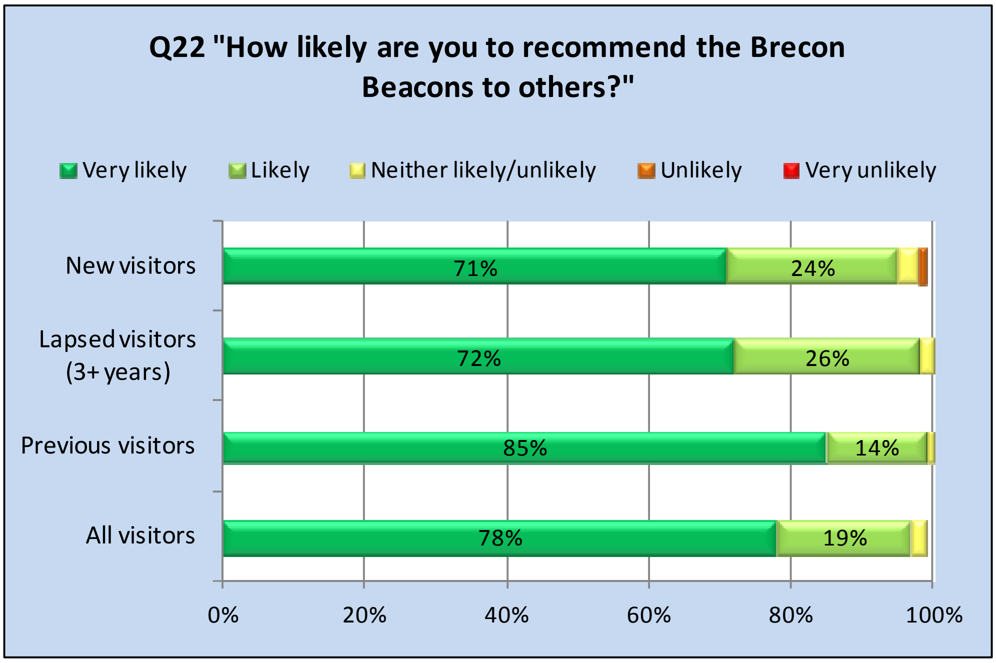
Base: 1377 Visitor Respondents

3.87 Overall, the visit experience is good and almost half (48%) of visitors said it exceeded their expectations and 51% said it met them. Just 1% said that their experience fell short of expectations. This year's Visit Wales visitor survey shows similar results for Wales as a whole (49% exceeded and 49% met expectations).

3.88 There is little variation amongst day and overnight visitors. The highest ratings come from new visitors 56% of which say the visit exceeded their expectations. This is encouraging for potential future return visits.

3.89 Visitors from some areas are slightly more impressed by the area than others. Over half of the visitors coming from London & South East (53%) and overseas (52%) said that expectations were exceeded.

Good level recommendations likely



Base: 1378 Visitor Respondents

3.90 The importance of advocacy in promoting the area should not be underestimated, particularly with the development and use of social media and its ability to allow images, thoughts, experiences and weblinks to be shared with ease amongst family, friends and colleagues.

3.91 More than three quarters of visitors (78%) are ‘very likely’ to recommend the area with a further 19% likely to do so. Previous visitors are the greatest advocates (85%) with lapsed and new visitors slightly less eager to spread the word.

3.92 Amongst visitor group type, lone visitors are the most likely to recommend (84%) along with ‘other’ groups (81%). Slightly lower, just over three quarters of couples (76%) are very likely to recommend the Brecon Beacons to others.

3.93 Unsurprisingly, visitors from Wales are the most likely to recommend to others (87% ‘very likely’) but visitors from London & South East are also particularly positive (81%). Just over seven in ten overseas visitors (71%) are very likely to recommend but the remainder are ‘likely’ to.

3.94 Day visitors, many of which originate from Wales, are the most likely recommend (89% ‘very likely’) compared to 77% of overnight visitors.

Most enjoyable aspect of visit

3.95 The most enjoyable aspects of the visit are likely to be the memories which are passed on to family, friends and colleagues but will also provide the motivation to return in the future.

3.96 Respondents were asked to provide an unprompted description of the best or most enjoyable aspects of their visit.

3.97 The Brecon Beacons is memorable for a wide range of experiences. The most common aspects mentioned by visitors are:

- Landscape, scenery and natural environment (43%)
- Walks (26%)
- Peace and tranquillity (14%)
- Specific natural sites such as Pen y Fan, Sugar Loaf and the Waterfalls (14%)
- Accommodation (13%)
- Friendliness of the people in the area (10%)
- Food and drink (7%)
- The waterfalls were mentioned specifically by 4% and the canals by 3%.

"Accommodation excellent, scenery beautiful, lovely friendly area, nice walks, village pubs and restaurants."

"Amazing scenery with beautiful light for our photographs. Our B&B was so friendly and welcoming and the view from our bedroom window was stunning."

"Being outside in such a spectacular area - there is so much scenery and although the weather wasn't great we still had a terrific time."

"Just relaxing and enjoying the scenery, canals and open spaces. It was so quiet compared with where we live."

"Pace of life was slower and calmer, greenness of countryside, number of things to do in a relatively small region."

"The landscape and pubs selling real ale and good food."

How can visits be more enjoyable?

3.98 In terms of improving the area to make visits more enjoyable, around 70% of visitors made no suggestions, said that nothing could be improved or suggested that better weather was the only thing they would change.

3.99 Where practical suggestions were made, the key areas for improvement include:

- The ‘eating out’ experience in terms of the quality, range and availability of food and drink.
- Transport, roads, parking and signage – including better road signs and signage in general, way markers on paths, path maintenance, bus services and accurate information about services, availability of car parking/pricing.
- Improvements in accommodation such as the availability of smaller campsites, improved facilities and equipment, cleanliness and maintenance of accommodation.
- Availability of appropriate and accurate visitor information such as local transport information, more walking and biking maps, better service and information through TICs.
- Shopping and also the image of town centres such as Brecon were considered by some to be lacking in variety and in need of an ‘update’. Several commented on the number of closed shops.
- Cleanliness and maintenance of toilets and the removal of litter from car parks, villages, roadsides and footpaths. Some commented on overgrown footpaths.

“The footpath signs were really unreliable - sometimes there more often not, not up to the standard we're used to, where we can rely on them as in the Lake district and in Yorkshire. We can map read, luckily! But paths on the map were sometimes waymarked, and sometimes had disappeared altogether!”

“Better signposting on footpaths. Got lost visiting Sgwd yr Eira. Very lost resulting in an additional very exhausting 3 miles.”

“There was quite a lot of litter lying around in some of the remoter parts of the National Park.”

“We had great difficulty finding somewhere to eat out on a Sunday evening and drove around for so long searching for somewhere that served half-decent food after 7.00 that it became quite miserable. Why do so few places serve food on a Sunday evening? Eventually we found ourselves in Crickhowell - 12 miles from where we were staying. We found a pub that reluctantly prepared to serve us (it was just after 7.00). Whilst we were eating there was a constant stream of people coming in asking where they might find somewhere to eat.”

“Persuade more pubs and places to eat to advertise that they let dogs in. And provide food after 9pm!”

"The pricing in some of the restaurants was akin to central London prices - just silly expensive!"

"Local produce and products more affordable - want to support local economy more."

"Brecon itself is lacking in really good pubs/restaurants - there are loads in the area but only accessible by car."

"More vibrant energy in town (Brecon). Nice authentic pubs. Nice authentic shops. It looked a bit forlorn."

"I hate to say it but there was quite a lot of rubbish on road sides, lanes and the canal."

"Toilets near Storey Arms could be kept cleaner."

"Better sign posting and leaflets - difficult to tell from attractions leaflets where the attractions are."

"Better information on national park website - I didn't find it very clear & easy to find walking trails or good maps of route hikers could take."

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 86 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.

European trips, breaks elsewhere in Wales and the South West 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 (33%), elsewhere in Wales (28%), Devon & Cornwall (26%), Lake District/Cumbria (16%) and the South Coast (16%). Around one in ten (8%) 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 A quarter of non-visitors say that they intend to visit the Brecon Beacons but have not yet done so (24%) suggesting that there no particular barriers to visiting. A similar proportion said that they have not considered the area (23%).

4.6 Others comment that they had already booked a trip elsewhere (17%) and that they didn't have time to visit this year (17%).

Good intentions to visit in the future

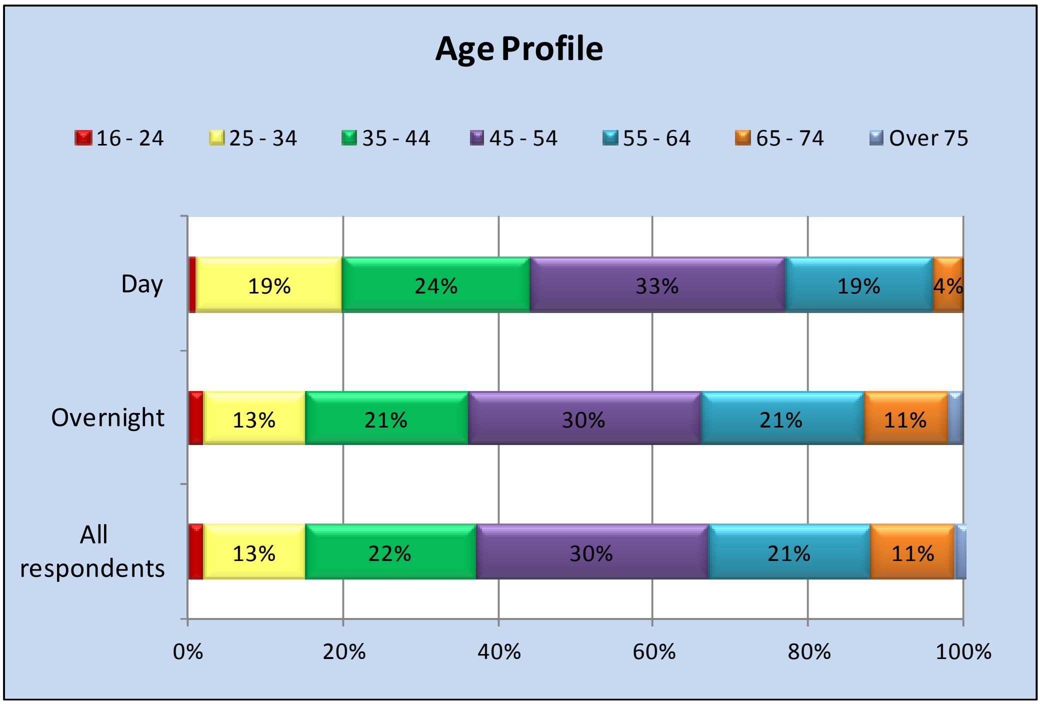
4.7 Two in five (40%) of those who have not yet visited said that they 'definitely intend to' in the next 12 months with a further 35% suggesting that they might do so.

4.8 Less than one in ten (7%) do not intend to visit and a fifth (18%) 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: 1463 respondents

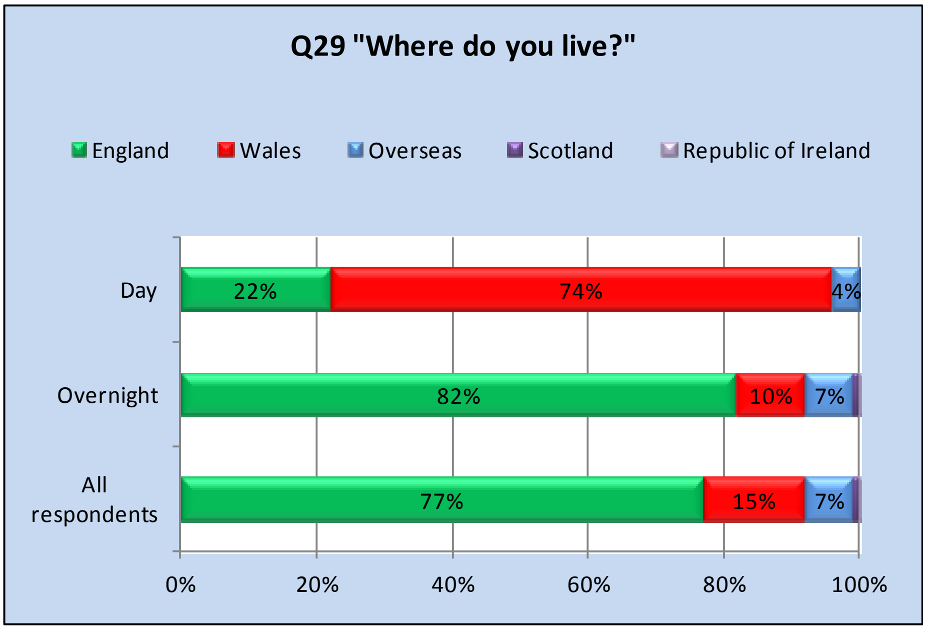
5.2 This question gives an indication of the age of the **respondent** rather than the party. The age group of each party would vary depending on the type of group e.g. large party, families and the number in the party.

5.3 The respondent age profile varies widely and there are no particularly dominant groups. Day visitor respondents tend to be of a slightly younger profile and whilst over 55's make up a third of overnight visitors (34%), they only form a quarter of day visitors (23%).

5.4 Half of overnight visitors (51%) are 35-54 rising to 57% for day visitors.

5.5 Visit Wales visitor survey results for this year show that just 12% of staying visitors to Wales are under 35, despite this age group making up one third (33%) of the UK adult population. Brecon Beacons, however, is slightly closer to the UK profile with 15% of staying visitor respondents under 35.

Visitors mainly from England and Wales



Base: 1459, all respondents

5.6 A large proportion of survey respondents are overnight visitors to the Brecon Beacons and the location of their origin reflects this.

5.7 A high proportion of overnight visitors (82%) are from England but the majority of day visitors (74%) are from Wales. A fifth of day visitors (22%) are from England and hale from the Midlands (38%), South West (25%), South East (13%) and the Cotswolds (13%).

5.8 In terms of visit history, 85% of lapsed visitors are from England. 15% of new visitors are from overseas which is double the amount in the sample (7%).

5.9 English staying visitors come from the South East (25%), Midlands (14%), South West (14%) and London (11%) reflecting marketing activity for the area.

5.10 Overseas visitors travelled from the Netherlands (35%), Germany (13%), USA (10%) and Belgium (10%) amongst other countries. This reflects PR activity undertaken in these areas.

6. Recommendations

6.1 Based on the findings of the research, we have a number of recommendations for consideration.

Develop the survey

6.2 The survey itself is becoming more and more representative of visitors due to the use of the open survey which captures the views of both day and overnight visitors. However, further efforts to raise awareness of the visitor survey could be made from many sources. To be effective, we need a regular effort to promote the survey throughout the year and at least once a quarter.

6.3 Partners and businesses in the area can all play a part in spreading the word through social media, by invitation, posters or small flyers.

6.4 Day visitors could be reached through sites and venues which we know attract them e.g. Storey Arms, Mountain Centre, Penderyn, festivals in Hay, Brecon, Abergavenny and other events such as walking festivals and stargazing events.

Improve the eating out and local food experience

6.5 Brecon Beacons has a good reputation and visitors clearly, on the whole, have a good experience. However, there are some areas where the visitor experience could be improved.

6.6 Food and drink is an important means of creating a ‘sense of place’ in a destination. The comments from some visitors suggest that good quality pub and restaurant food is sometimes lacking – either due to the choice food and drink on the menu or because of opening times.

6.7 There is an opportunity to enhance the food and drink offering to make it more distinctive and memorable. Partners and stakeholders should work with businesses to enhance the quality, range and availability of food and drink available in the area.

Better transport, signage and directions

6.8 Better information on transport, especially the provision of accurate public transport information needs to be available, particularly through TICs.

6.9 Improvements in signage and way markers would be welcomed, particularly for walkers and cyclists. Several respondents found routes difficult to follow or commented that they or other had got lost. Some made comparisons with other areas which seem to be more reliable.

Improved visitor information

6.10 Comments point to the need for more accurate information, more walking and biking maps and more knowledgeable staff in TICs.

6.11 The new website could be an ideal place to provide downloadable PDFs of routes for cycling or walking, in addition to improving information already available in print.

6.12 If printed information is out of date, it should be removed or made clear to visitors where information is current and where it is outdated e.g. through advice or use of stickers or updates.

6.13 TIC staff need to be knowledgeable, helpful and approachable. They are often the first point of contact that visitors, and particularly new visitors, have in the area and these impressions last. Ratings are on the whole good, but there are some examples where service could be improved. Staff training should be used to improve skills and local knowledge where required.

Visitors like vibrant towns

6.14 Creating the right atmosphere in towns and villages is important in encouraging visitors to stay in the area longer which in turn impacts on their use of retail and hospitality outlets.

6.15 Many respondents comment on the lack of independent shops, particularly for an area known as a 'foodie' destination. Some expect to find good local produce both to buy and in use in hospitality outlets. Others mentioned that the number of empty shops is more noticeable and a little disappointing.

6.16 Several visitors suggest that towns such as Brecon are looking a little 'tired' and would benefit from investment to liven up the experience – whether shopping or eating out. This is a matter for partners and stakeholders to consider along with the local business community.

Cleanliness and litter management

6.17 Whilst not a major point, several respondents comment on the variable levels of cleanliness and maintenance across the area. Some suggest public conveniences are so good they should be nominated for an award, whilst others find facilities 'a bit grubby'.

6.18 There is mention made of litter problems in some areas of the Park and this can be difficult to manage because it is visitors who cause the litter problem. Partners and stakeholders should review if there are adequate waste facilities and continue to make efforts to encourage visitors to take away their litter.