Brecon Beacons National Park Visitor Survey 2016-17

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1. Executive Summary

The Brecon Beacons National Park Visitor Survey 2016-7 collected over 1,700 responses through a face to face and online survey conducted during February 2016 – March 2017. 36% of participants were day visitors, 19% were locals and the remaining 45% were staying visitors. The key survey highlights are shown below:

Motivations and influences for a trip to the Park

Landscape, walking and previous visits are the main motivators

- Visitors choose the National Park for the beautiful scenery and countryside (59%), walking in the uplands (33%), previous visits (28%), peace and quiet (25%), lowland walking (23%) and for health/exercise (21%).
- The beauty of the area is more attractive to visitors from overseas (74%) and England (65%) than Wales (52%).
- Getting healthy and taking some exercise is a stronger motivation for day visitors (27%) than other groups.

Enjoying the outdoors, visiting the National Park and the effect on wellbeing have most influence

- When prompted, enjoying the outdoors and fresh air most influences a decision to visit the Park (61%). This drives day visitors most (67%) but overseas visitors (44%) are more swayed by visiting the Park itself (60% compared to 42% overall).
- Improving wellbeing – both physical and mental - influences about two fifths to visit.

Visitor profile

No dominant age group, slightly more male visitors and more affluent social groups

- Brecon Beacons day visitor age profile is similar to Wales, but slightly higher for 16-34s (26% compared to 23%) and lower for over 55s (33% and 39%).
- Staying visitors tend to be younger than for Wales as 36% are 16-34s compared to 18% for Wales.
- 53% of visitors are male, 47% female. 23% had a dog with them, rising to 30% for locals. 80% of visitors are in ABC1 social groups, higher than for Wales staying visitors (72%) or day visitors (65%).

Half of all visitors come from Wales, two fifths from England

- 52% of visitors were from Wales, accounting for 77% of day visitors.
- 40% come from England, making up a quarter of day (23%) and 70% of staying visitors. They hail from South West (31%), South East (27%), West Midlands (14%) and London (13%).
- 7% are from overseas, making up 15% of staying visitors. They come from areas reflecting marketing activity including Germany (17%), USA (15%), Netherlands (13%), France (11%), Spain (8%) and Australia/New Zealand (7%).

Most hail from Powys, Cardiff and Swansea

- 18% coming from Wales are from Powys, 13% from Cardiff and 10% from Swansea. Numbers from nearby counties are relatively small.

Visitor spend and party size

Visitor staying in the park spend more

- Staying visitors typically spend around £270 on accommodation but more if staying outside the Park (£313) than within the Park (£219).
- Daily spend on food and drink is higher for those staying in the Park (£67) than outside (£52) and much higher than for locals (£13) or day visitors (£14).
- Average party size is 3.2 people, larger for staying visitors (3.4) compared to locals (2.8) and day visitors (3.0).

Planning and accessing information

Previous knowledge and websites most used to plan trips

- Two thirds use existing knowledge to plan their trip. Websites are the next most popular source. Staying visitors use a range of offline and online sources including guidebooks, TICS and visitor guides.
- Most do general web searches or use the destination website. Others use accommodation sites or Visit Wales.

Many don't access information during a visit - smartphones, maps and GPS are most popular

- Two fifths don't access visitor information during a visit, even more so for locals. When they do, they use smartphones (30%), OS maps (29%), GPS units (21%), road maps (16%) and guidebooks (11%). Staying visitors are most likely to access information during a visit.

Visitor activities during the trip

Visitors like sightseeing, relaxing and walking

- Almost half enjoy general sightseeing or relaxing. Around three in ten do walking at high or low level. High level walking is less popular with locals. A quarter eat out or visit a town or village. Staying visitors are more likely to eat out than day visitors.

Brecon and Storey Arms are the hotspots

- Visitors go to a range of locations in the Park. 23% of visitors went to Brecon and 21% to the Storey Arms/Pen Y Fan area. They also go outside the Brecon Beacons (12%), to Abergavenny (10%) and Hay on Wye. Less than 10% visited other sites around the Park.

Visitor satisfaction and perceptions

High satisfaction ratings for the Park

- 85% of visitors rate their visit to the Park as 'very good' and 13% good. There are no negative ratings.
- Customer service is all generally well received at various facilities, but accommodation, visitor attractions and eateries have the highest scores. Few give a negative opinion of customer service but 4% say shops are poor/very poor and 13% average.

Most likely to return, but first timers are a little less committed

- 87% say they are very likely to visit the area again, dropping to 64% of first time visitors and most of the remainder are fairly likely to return.

Very positive perception of the area with some areas for improvement

- Visitors most like the landscape, beauty and unspoilt environment.
- Most feel the Park is well cared for, offers good value for money and that information is easy to access.
- Few suggest improvements, but these include provision for toilets, signage and information, general maintenance, parking, amenities and connectivity.
- Two fifths would consider donating time or money to help the Park.

2. Introduction and Background

Survey Background

2.1 In December 2015, the Brecon Beacons National Park Authority (BBNPA) commissioned Strategic Research and Insight Ltd (SRI), then known as Strategic Marketing, to conduct a survey of visitors to the Brecon Beacons National Park.

2.2 The study was required to understand better how visitors experience the National Park, where they go and what they do. Previous surveys of visitors to the area provided limited information on visitor behaviour and characteristics, were summer only, had insufficient sample size to allow for subgroup analysis and did not give enough information on day visitors in particular, which form a large part of the visitor economy in the area.

2.3 Within this context, there was a requirement to create robust and detailed evidence to inform:

- Visitor Management Plan
- National Park Management Plan
- Sustainable Tourism Strategy

Research Objectives

2.4 The key research objectives were to:

- Gather data to understand the characteristics, behaviour and attitudes of Brecon Beacons National Park visitors – including residents, where appropriate
- To collect data throughout the 2016-17 visitor year
- To collect data from various locations and destinations throughout the National Park – not just the popular areas; including details of the weather during the visit
- A 'repeatable' method to give a benchmark for future surveys
- Collect data that can be used to validate and inform on the reliability of other data sets e.g. triangulation, comparison
- Collect data to support the NPA's reporting requirements under the Wellbeing and Future Generations Act

3. Methodology

Survey Method

Concurrent face to face and online surveys

3.1 In order to achieve a balanced, widespread sample across the National Park, a yearlong study and meet the extensive information requirements, the survey was carried out primarily through face to face interviews supported by an online survey. These methods, for most of the survey period, ran concurrently.

Method	Interviews	%
Face to face fieldwork	1256	74%
Online	451	26%
Total	**1707**	**100%**

3.2 The primary method was face to face, accounting for three quarters of the interviews. This allowed a wide distribution of interviews at specific sampling points throughout the park, rather than just the popular locations.

3.3 The secondary method was an online survey which accounted for around a quarter of the results. There was no guarantee on the volume or sampling for this method.

3.4 Combined, these methods allowed for data collection in both peak and non-peak periods throughout the year.

3.5 In total, there were over 1700 responses, providing highly robust data. Details on this are provided later in this section.

Face to face survey

3.6 The face to face fieldwork was conducted across the Park with both residents and non-residents. It was piloted in February 2016 and shifts were conducted right through to December 2016.

3.7 All interviews were conducted electronically on tablets and were available in both Welsh and English.

Online

3.8 Following the pilot of the face to face survey, the online version went live from March 2016 and ran right through until the beginning March 2017.

3.9 The link to the survey domain was promoted by the BBNPA, survey partners and the trade. Typically this was through regular posts on social media. Some printed 'business cards' were also distributed during the last phase of the project to promote the survey link.

3.10 A quarterly prize draw incentive was used to encourage response with the winner receiving shopping vouchers.

Sampling Locations and Interviews Achieved

3.11 A key objective of this project was to obtain feedback from visitors across the National Park and not just the 'honey pot' locations. To achieve this, SRI worked with BBNPA to identify suitable sampling points right across the Park taking into account likely footfall, shelter and safety.

3.12 The map below illustrates how the 20 sampling points were spread across the National Park:

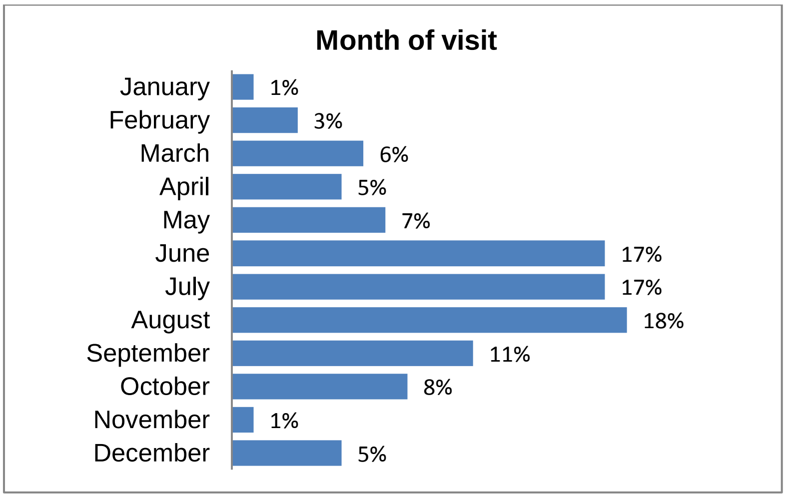
3.13 The locations of interview and number of interviews obtained including online responses are shown below. Storey Arms was boosted to obtain at least 200 interviews (funded by National Trust):

Location of interview	Interviews	%
Online	451	26%
Storey Arms (Pont ar Daf car park)	210	12%
Llanthony	75	4%
Hay-on-Wye	67	4%
Brecon Town Centre	63	4%
Llangorse	63	4%
Keepers Pond	61	4%
Craig Y Nos Country Park	58	3%
National Park Visitor Centre	57	3%
Talybont	57	3%
Abergavenny	55	3%
Talgarth	55	3%
Llandovery	54	3%

Location of interview	Interviews	%
Crickhowell	53	3%
Gunpowder works	52	3%
Waterfalls: Cwm Porth	51	3%
Torpantau	50	3%
Mon and Brecon Canal: Goytre Wharf	49	3%
Careg Cennen	46	3%
Hay Bluff	44	3%
Pengenffordd	36	2%

Interview Distribution

3.14 As the survey ran over the course of a year, the month of interview (or visit for online respondents) was noted. The distribution of interviews by month is as follows:



Base: 1690

3.15 This has been used to analyse responses by season and comments on any notable differences are included throughout the report. For reference purposes, we have used sector definitions of the seasons (months are inclusive):

- Spring (March - May)
- Summer (June - August)
- Autumn (September - November)
- Winter (December - February)

3.16 Additional information regarding the circumstances of interviews was noted by field interviewers, and in some cases online respondents, including the weather conditions and days interviewed. This information is included in the Technical Appendices.

Statistical validity

3.17 As this is a survey rather than a census, the number of respondents involved has a big impact on the reliability of the data.

3.18 With over 1700 responses, the data set is rich for this study and results in a confidence interval (CI) of +/- 2.4% which is highly robust in terms of market research standards which generally dictate a CI of 5% or less.

3.19 This means that, in a worst case scenario, should 50% of the respondents give a particular response, we can be 'sure' that the true figure will lie between 47.6% and 52.4%.

Report structure

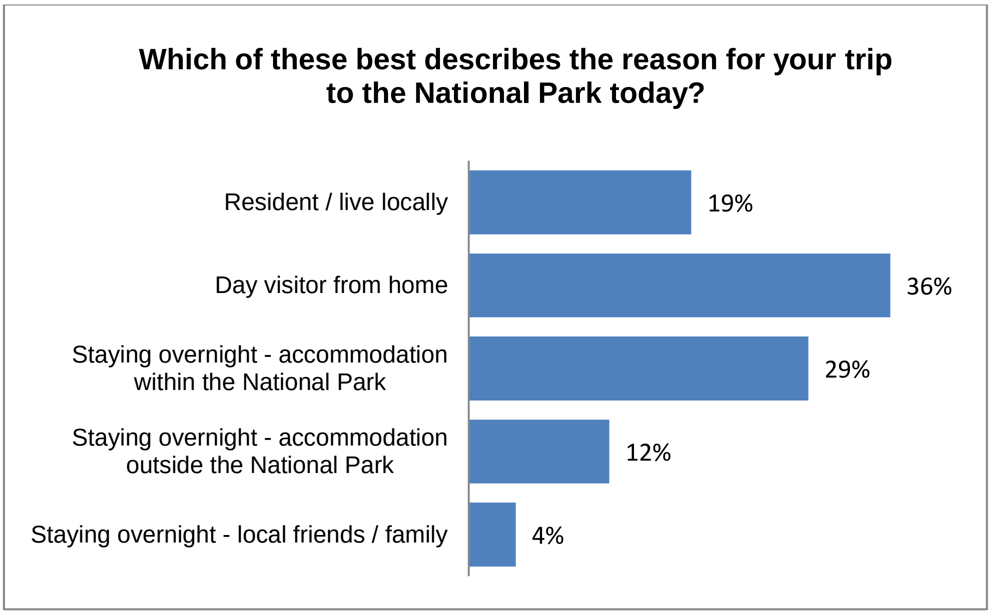
3.20 The report is structured according to the topics and themes covered in the questionnaire rather than question by question.

3.21 The base figures vary according to the particular group of respondents who were asked the question. Some questions were only asked of online respondents, some to face to face respondents and some only to those visiting Storey Arms. References to this are made under the relevant chart or table throughout the report.

3.22 For many questions, participants were able to give more than one response and in these cases, figures will not add up to 100%. In some cases, due to rounding, single response questions will not total exactly to 100% also.

4. Type of Visitor and Motivations

Main reason for trip



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4.1 Over a third of respondents were day visitors from home (36%) and when adding in those who live locally, this rises to over half (55%).

4.2 Day visitors from home were most often lone visitors (42%) and those visiting with friends (43%) but less typical amongst families with children (30%).

4.3 Around three in ten (29%) are visitors staying within the National Park, but this is higher for couples (35%) and families with children (35%). Those visiting alone are least likely to be staying visitors within the park (13%).

4.4 Throughout the report, we have grouped these respondents into three categories of visitor: 'staying visitors', 'day visitors' and 'locals'. It is worth noting that those who consider themselves to live locally are not restricted to residents within the park and are self-defined.

Motivations for choosing Brecon Beacons National Park

Scenery, walking and previous visits provide strong motivation for a trip

4.5 When asked what the main motivations were for choosing the National Park for a visit, the scenery and beauty of the area dominate the factors most often mentioned.

4.6 The table below shows the responses given by 5% or more of those surveyed. Respondents were able to give more than one answer from a pre-coded list.

Main reasons for choosing the BBNP	%
Beautiful scenery / countryside	59%
Walking in the uplands	33%
Been before / enjoyed a previous visit	28%
Peace and quiet/relaxation	25%
Walking in the lowlands	23%
To get healthy / take some exercise	21%
Sight seeing	19%
Like the area / general positive statement	19%
To undertake a challenge	17%
Visiting heritage sites	10%
Visiting attractions	9%
Wildlife/bird watching	8%
Walking along the canal	8%
Meeting up with friends/family	7%
Visiting friends/family	7%
Good variety of things to do for adults	6%
Never been / always wanted to visit	5%

Base: 1706

4.7 The beauty of the area is the biggest motivator to visit, mentioned by around six in ten respondents (59%). Overseas visitors (74%) and those from England (65%) give this reason most often compared to around half of those from Wales (52%).

4.8 Activities are also attractive with upland walking being the most popular (33%) particularly with staying visitors (36%) and day visitors (35%) but less so for locals (24%).

4.9 Previous experience of the area is also a big pull, with over a quarter (28%) citing this as one of the reasons for choosing the park.

4.10 Visits are also motivated by wellbeing and health, with a fifth suggesting they visit to 'get healthy and take some exercise' (21%). This is most popular with day visitors (27%).

Enjoying the outdoors, visiting the National Park and the effect on wellbeing are most influential

4.11 Respondents identified the **most** influential factor on their decision to visit the National Park based on a prompted list:

Most influential factor on decision to visit the BBNP (Prompted)	%
To enjoy the outdoors and fresh air	61%
Wanted to visit the National Park in particular	42%
To help improve my sense of wellbeing/mental health	41%
To help improve my physical health	37%
A great opportunity to see wildlife	31%
Plenty of attractions and outdoor activities	25%
Good value for money day out/ visit	24%
To experience history and culture	23%
Its conservation activities	19%
Because of a recommendation	13%
Other	16%

Base: 1696

4.12 Getting outdoors into the fresh air is the most influential factor in deciding to visit for six in ten visitors (61%), even higher for day visitors (67%) and those who have visited two or more times (66%). It is equally strong and influence for those visiting from Wales and England (62-63%) but less so for overseas visitors (44%).

4.13 The attraction of the National Park specifically is the most important factor for two fifths (42%) but overseas visitors are the most motivated by this (60%) as are staying visitors (49%).

4.14 Improving wellbeing and mental health is a key driver for two fifths (42%), and around half the day visitors (48%) and a similar proportion of locals (45%). It is a stronger factor in the decision to visit amongst UK rather than overseas visitors (15%).

4.15 Improving physical health has slightly less influence on the decision than mental wellbeing, but is still a key factor for over a third (37%).

4.16 Interestingly, those visiting in Spring are much more likely to be influenced by the physical and mental health benefit factors (70% and 77% respectively), compared to those visiting in Summer (29% each). Winter visitors are also more motivated by improving wellbeing (62%).

4.17 There is some seasonal variation for those influenced by seeing wildlife. Those who visit in Spring (72%) and Winter (45%) mention this more often compared with Summer (21%) and Autumn (24%) visitors.

4.18 Conservation activities are most influential amongst locals (24%) and Spring time visitors (46%).

4.19 Finding good value for money is slightly more of a factor for locals (29%) and day visitors (27%) but most of all for those visiting in Spring (63%).

5. Visitor Profile

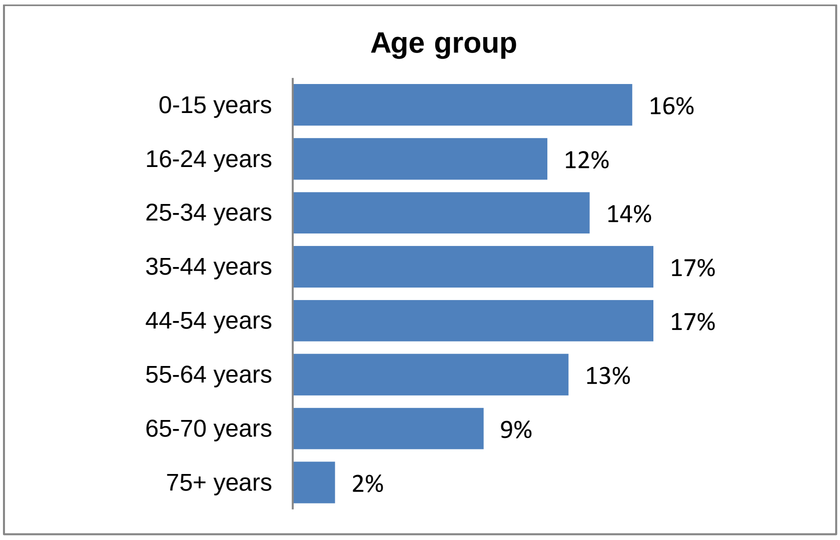
Demographics

5.1 A range of demographic information was gathered from participants to understand more about those using the National Park.

Age of Party

5.2 Respondents were asked to provide details on the age of the **members of the party** rather than just themselves.

5.3 No single age group dominates the visitor population. There is a wide range of ages with Under 25's making up 28%, 25-44's account for 31% and a further 30% are made up of those aged 44-64. Over 65s account for 11%.



Base: 1653 respondents

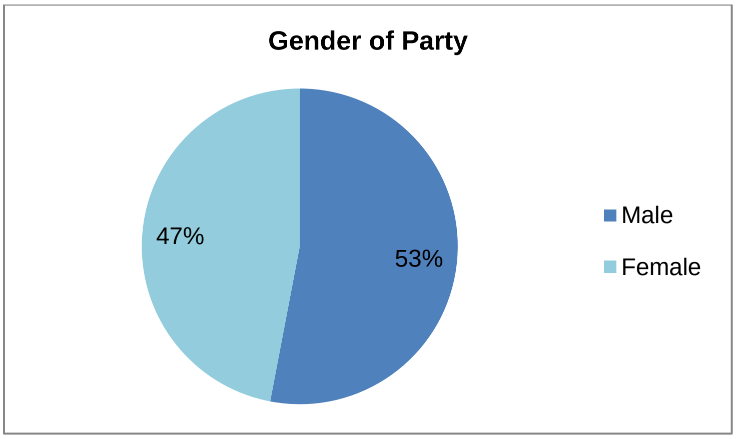
5.4 The following table shows the age profile readjusted to compare with the Wales Visitor Survey 2016 results. It should be noted that the national survey is based on the age of the **respondent** rather than the full visitor **party** and does not include under 15's.

5.5 The profile of day visitors to the Brecon Beacons is quite similar to the typical Wales visitor, but with slightly fewer visitors aged over 55. Brecon Beacons staying visitors, however, are much more likely to be in the 16-34 age group than for Wales overall and much less likely to be over 55.

Survey area and visitor type	16-34 years	35-54 years	55+ years
Day Visitors *(Brecon Beacons)*	26%	41%	33%
Day Visitors *(Wales)*	23%	39%	39%
Staying Visitors *(Brecon Beacons)*	36%	40%	24%
Staying Visitors *(Wales)*	18%	41%	40%

Gender of Party

5.6 Again, this analysis is based on **members of the party** rather than just respondents. Just over half of those visiting were male (53%) and 47% female.



Base: 1694 respondents

Social group

5.7 Respondents provided details of the occupation of the chief income earner within the household. These were then coded into social groups according to standard Market Research Society criteria.

5.8 Around half of respondents (51%) are in social group AB, 29% are in C1, 13% in C2 and 7% in DE. This is slightly higher than in the Wales Visitor Survey 2016 where ABC1s account for 72% of staying visitors and 65% of day visitors. Social grade descriptions and the statistics for England and Wales below show the skew in the visitor profile compared to the general social grade of the population:

Social grade	Description	% Population in England and Wales
AB	Higher and intermediate managerial, administrative and professional occupations	23%
C1	Supervisory, clerical and junior managerial, administrative and professional occupations	30%
C2	Skilled manual occupations	22%
DE	Semi-skilled and unskilled manual occupations, unemployed and lowest grade occupations	25%

Source: Census 2011, ONS

Dog owners

5.9 Just under a quarter of respondents had a dog with them (23%). This was highest for locals (30%), in line with the average for day visitors (25%) and around a fifth for staying visitors (19%).

5.10 In terms of the type of group, families without children (30%) or with children (29%) were most likely to have a dog with them but friends (17%) and organised groups (16%) least likely.

5.11 In terms of visitor origin, 29% of visitors from Wales had a dog with them and 19% from England.

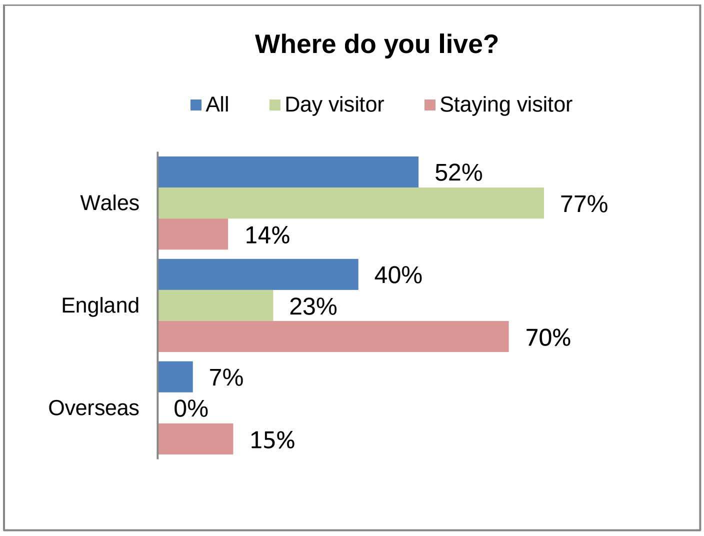
Other demographic characteristics

5.12 Other demographic information was also requested during the survey. A summary is noted below with full details in the Technical Appendix:

- **Ethnic group of respondents:**
  - 89.1% were from White-British backgrounds; 0.6% White-Irish; 0.4% White Gypsy or Irish traveller; 7.3% from other White backgrounds
  - 1.7% were from any other ethnic group including Asian, Black African, Black Caribbean, Arab or multiple ethnic background.
  - 0.9% preferred not to say
- **Working status:**
  - 61% work full time (30 hours+)
  - 15% work part time (up to 29 hours)
  - 12% are retired
  - 4% are in full time education
  - 2% are looking after the home
  - 1% are full time carers
- **Welsh language ability:**
  - 5% of respondents were advanced or fluent Welsh speakers
  - 4% were intermediate
  - 15% had some limited ability
  - 70% were non-Welsh speakers
- **Health conditions and impairments**
  - 13% say someone within their party has a health condition which impacts on their day to day life.

Visitor origin

Over half of National Park visitors are from Wales, two fifths from England



Base: 1707

5.13 Just over half of the visitors interviewed come from Wales (52%) and they also make up three quarters of day visitors (77%) and 14% of staying visitors.

5.14 Visitors from England account for two in five respondents (40%), 23% of day visitors and 70% of staying visitors.

5.15 Overseas visitors make up around 7% of the overall sample and account for 15% of staying visitors.

Visitors from England hail from the South West and South East

5.16 Visitors from England come primarily from the South West (31%), South East (27%), West Midlands (14%), Greater London (13%), East Midlands (5%), East Anglia (4%), North West (3%) and 1% each from Yorkshire and the Humber and the North East.

Overseas visitors mainly Europe but also the USA and Australasia

5.17 The most popular countries of origin for overseas visitors are Germany (17%), USA (15%), Netherlands (13%), France (11%), Spain (8%) and 7% from Australia/New Zealand. Full details of the other countries of origin are in the Technical Appendices.

National Park most popular with Powys, Cardiff and Swansea residents

5.18 Unsurprisingly given its location, residents from Powys are most drawn to the National Park and account for almost a fifth of those who come from Wales (18%).

5.19 Although Cardiff is not a neighbouring county, it accounts for the second highest number of visitors from Wales (13%), is the highest source of day visitors (18%) and joint highest for staying visitors with Pembrokeshire (13%). The distance from the National Park provides the opportunity to attract a large population from the capital for both day and overnight trips.

5.20 Swansea residents are also particularly attracted to the area (10%) and combined with neighbouring Neath Port Talbot make up 16% of visitors. Swansea provides 14% of day visitors.

5.21 The proportion of visitors from Wales who come from neighbouring counties is relatively low - Merthyr Tydfil (4%), Blaenau Gwent (3%) and Caerphilly (3%).

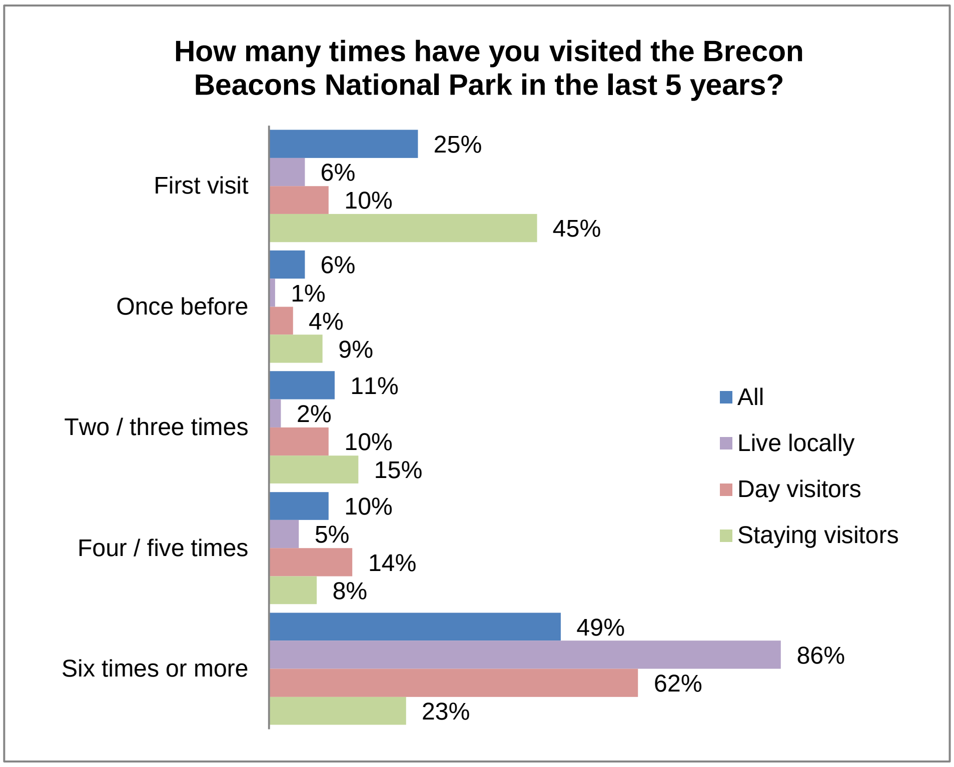
County of Origin in Wales	%
Powys	18%
Cardiff	13%
Swansea	10%
Monmouthshire	8%
Rhondda Cynon Taf	8%
Neath Port Talbot	6%
Bridgend	6%
Newport	5%
Carmarthenshire	4%
Merthyr Tydfil	4%
Torfaen	4%
Blaenau Gwent	3%
Caerphilly	3%
Vale of Glamorgan	3%
Pembrokeshire	2%
Gwynedd	1%
Wrexham	1%
Ceredigion	1%
Conwy, Flintshire, Denbighshire, Isle of Anglesey	<1% each

Base: 893 visitors from Wales

6. Planning and Accessing Information and Visit History

Visit History

Half have visited six times or more, a quarter are new to the area



Base: 1701

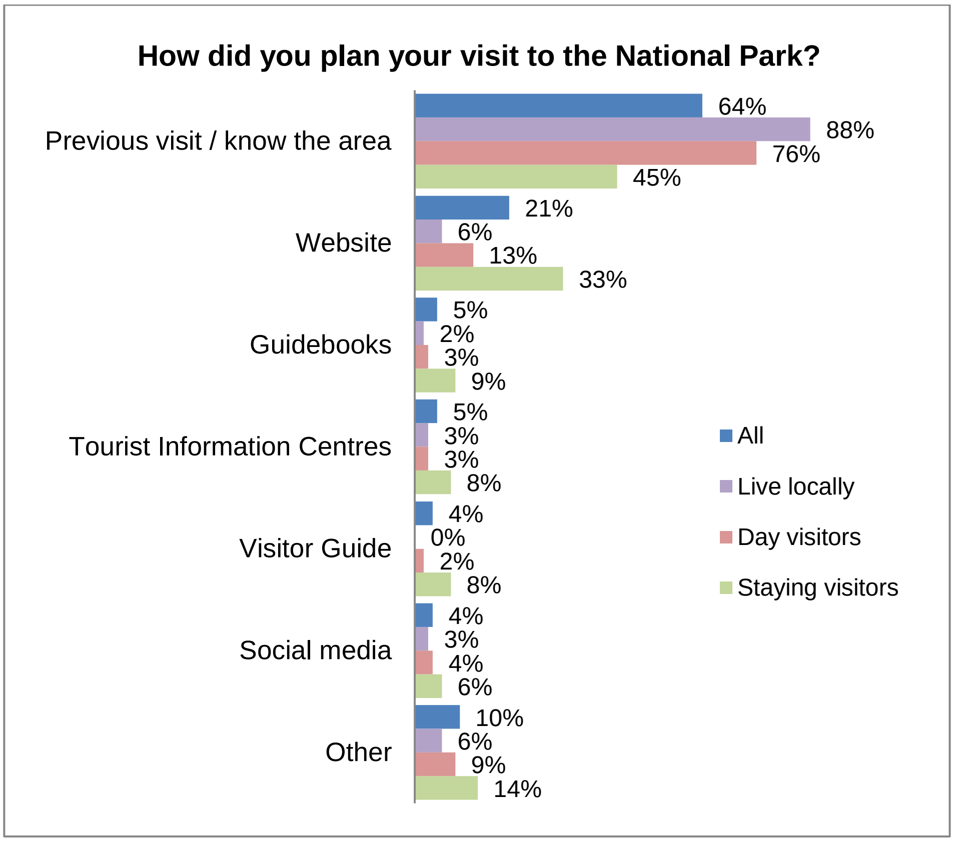
6.1 Almost nine in ten locals (86%) have visited six times or more compared to almost two thirds of day visitors (62%) and just under a quarter of staying visitors (23%).

6.2 Those in the area for the first time are more often staying visitors (45%), compared to a quarter overall. Over a third of those from England (36%) are visiting for the first time compared with 85% from overseas and just 8% of those from Wales.

6.3 Winter sees the lowest proportion of first time visitors (13%) when almost seven in ten (68%) have previously visited six times or more.

Planning the visit

Previous knowledge and websites are most used to plan trips



Base: 1703

6.4 Local knowledge gained from either living locally or previous visits is what most visitors (64%) use to plan a visit to the National Park, especially locals and day visitors.

6.5 Websites are next most popular tool for planning a visit with a fifth (21%) using online resources, but particularly staying visitors (33%).

6.6 Other off-line resources are used by a relatively small number of visitors, but most often by staying visitors, who still represent significant numbers of people.

General web searches are most often used

Websites used	%
General web search	30%
Brecon Beacons	19%
Accommodation websites	12%
Visit Wales	12%
National Parks (General)	4%
National Trust	4%
TripAdvisor	4%
Activity/Attraction/Event	3%
BBNPA	1%
Don't know/can't remember	7%
Other	7%

Base: 338, respondents using websites

6.7 General web searches are, unsurprisingly, the most popular with Google and Google Maps mentioned by most.

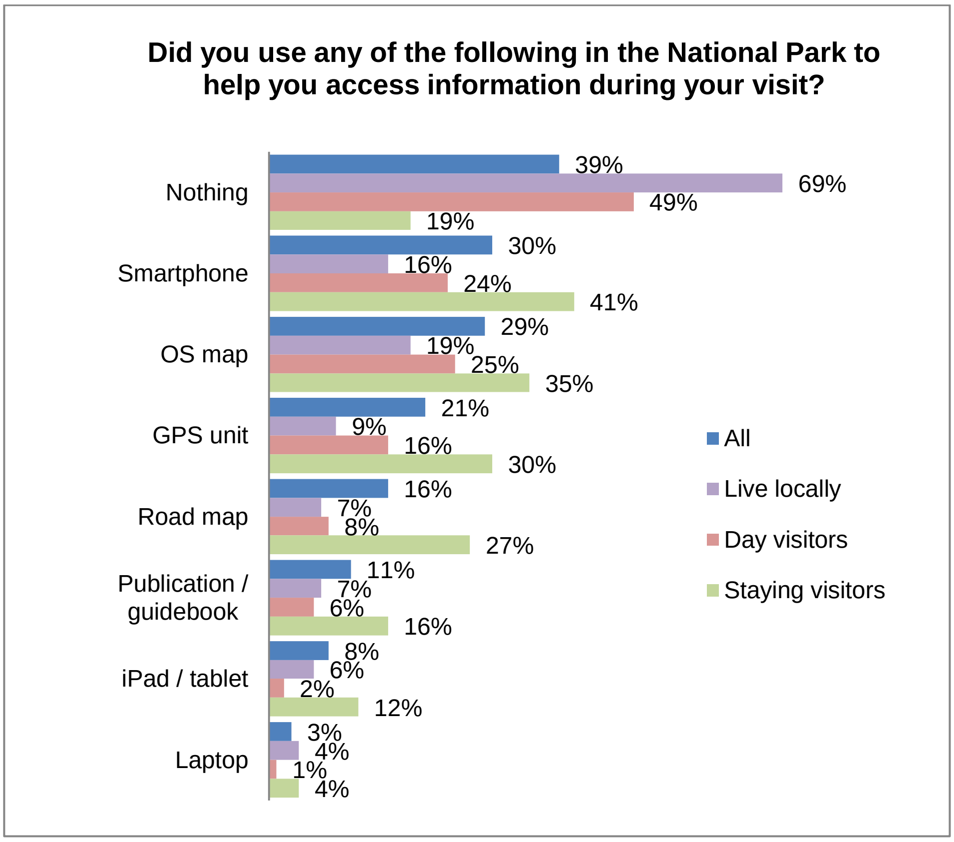
6.8 Around a fifth (19%) mentioned the destination website www.breconbeacons.org.uk or 'Brecon Beacons'.

6.9 Just over one in ten (12%) mentioned accommodation websites such as Booking.com, Airbnb, Brecon Beacons Cottages and other specific accommodation providers including caravan and camping websites.

6.10 Around one in ten mentioned Visit Wales specifically (12%).

6.11 Those who said some 'other' site referred to specific local destination sites such as Visit Crickhowell/Abergavenny/Hay-on-Wye, weather sites, Ordnance Survey and walking sites amongst others.

Two in five don't access information during visits, Smartphones and maps are used most otherwise



Base: 1704

6.12 Locals are the most likely to say they do not use anything to access information during their visit (69%) but also half of day visitors (49%). This is much less likely amongst staying visitors (19%).

6.13 Staying visitors are the most likely to access information during their visit, irrespective of the method.

6.14 Those who do access visitor information most often do so by smartphone, maps and GPS units. 55% of overseas visitors access information by smartphone, higher than those from England (37%) and Wales (22%). The ability to obtain a good signal is important to facilitate access to visitor information. Digital resources should also be optimised for smartphones to give the best access to visitor information.

6.15 Publications and guidebooks are also still popular amongst one in ten respondents (11%) overall and 16% of staying visitors.

7. Visitor Activities and Time Spent within the Park

What do visitors do?

Almost half enjoy general sightseeing/relaxing, walking is the most popular activity

Activities Undertaken	%
General sightseeing/ relaxing	45%
Walking – high level	33%
Walking – low level up to 2 hours	31%
Walking – low level over 2 hours	27%
Eating out e.g. bar, restaurant, café/ pub	26%
Visiting a town or village	24%
Photography	18%
Visiting attractions	13%
Visiting a historic or heritage site	12%
Watching wildlife/ birds	11%
Shopping (other than groceries)	8%
Cycling biking	6%
Visiting friends or relatives	6%
Go to a local event	6%
Dark skies/ stargazing	5%
Strenuous exercise	3%
Canoeing/ kayaking	3%
Travel on a canal boat	3%
Mountain biking	3%
Artistic activities	1%
Other	5%

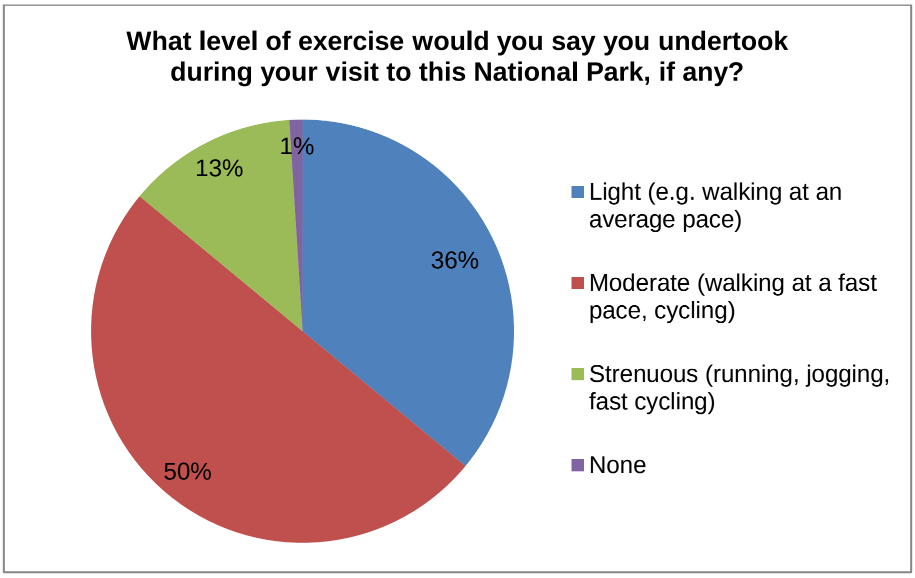
7.1 Visitors were asked about the type of activities they took part in during their trip. Almost half enjoy general sightseeing and relaxing, especially staying visitors (56%) compared with locals (32%) or day visitors (38%).

7.2 High level walking is less popular with locals (19%). Day visitors are least likely to eat out (20%) in contrast with staying visitors (32%).

7.3 Visiting a town or village is more popular with staying visitors (35%), likely reflecting the fact that they have more time to spend in the area and have more opportunity to explore.

Do they use the National Park for exercise?

Most undertake light to moderate exercise within the National Park



Base: 447 (online respondents only)

7.4 Half of the online respondents said they undertook moderate exercise within the park, slightly higher for staying visitors (54%) and lower for locals (44%). Over half of those visiting from England also did moderate exercise (54%) compared to 47% of those from Wales.

7.5 Strenuous exercise is more often taken by organised groups (28%) and lone visitors (22%) compared to 13% overall. Locals are also more likely to do strenuous exercise in the National Park (19%).

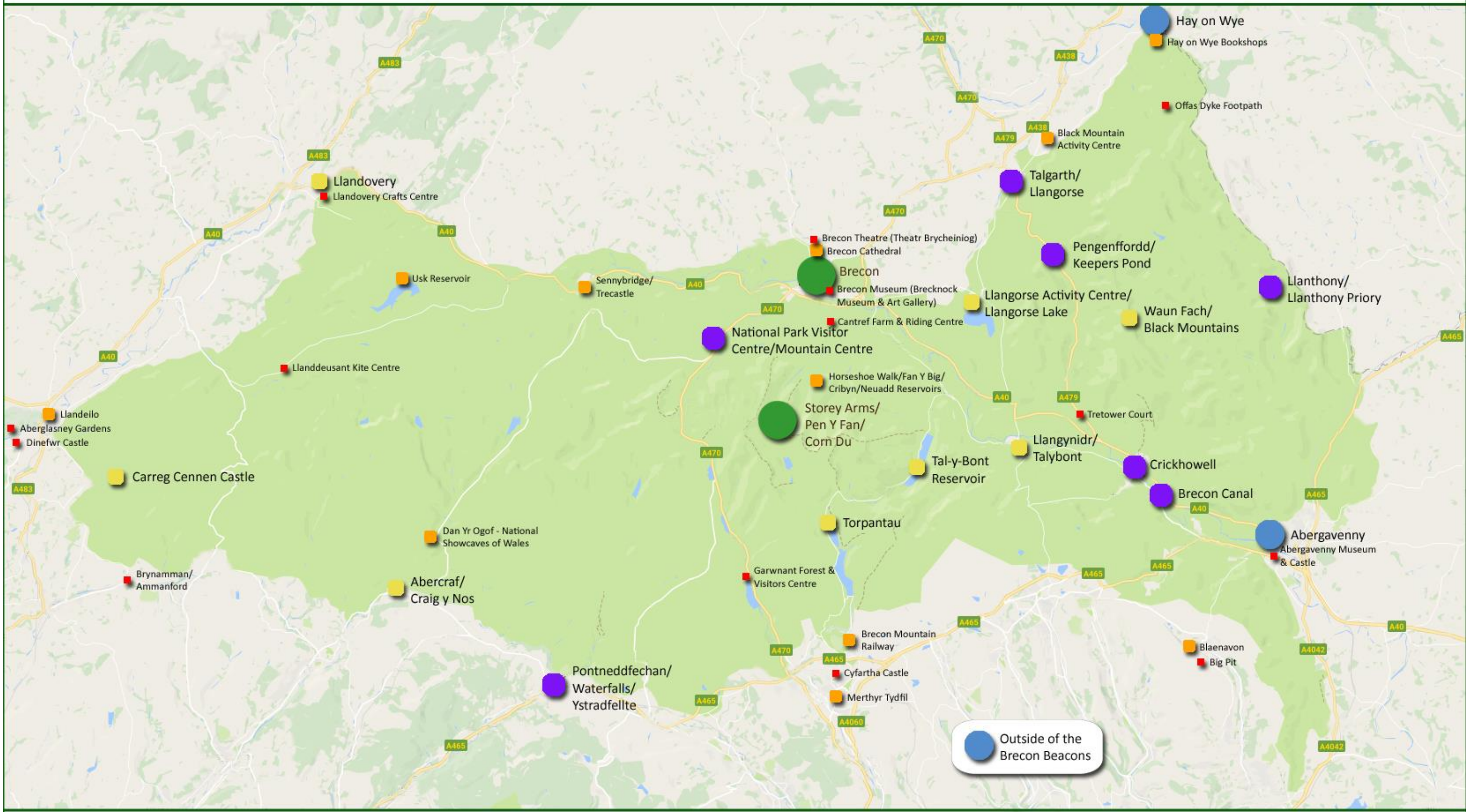
Where do visitors go?

Brecon and Storey Arms were visited by a fifth or more

7.6 In order to understand better how the park is used by visitors, those surveyed were asked where they went during their visit.

7.7 An overview is shown in the map below to give a sense of the proportion of those surveyed who visited each of the locations highlighted. Please note that this will, in part, reflect the fieldwork locations which were distributed around the park and included a booster sample at Storey Arms.

Where Do They Go? - Visitor Distribution Map for Areas Visited



Key: % of respondents that mention areas: 20% and over; 10-19%; 5-9%; 3-4%; 1-2%; <1%

7.8 The green spots show the most popular locations where 20% or more respondents visited. These were Brecon (23%) and Storey Arms/ Pen Y Fan/ Corn Du (21%). The blue spots show those areas visited by between 10-19% including outside of the Brecon Beacons (12%), Abergavenny (10%) and Hay on Wye (10%).

7.9 Purple dots show locations where 5-9% of visitors said they went to including:

- Pontneddfechan, Waterfalls, Ystradfellte area (9%)
- Crickhowell (8%)
- Mountain Centre (7%)

- Brecon Canal (9%)
- Talgarth/Llangorse (9%)
- Pengenfford/ Keepers Pond (6%)
- Llanthony/Llanthony Priory (6%)

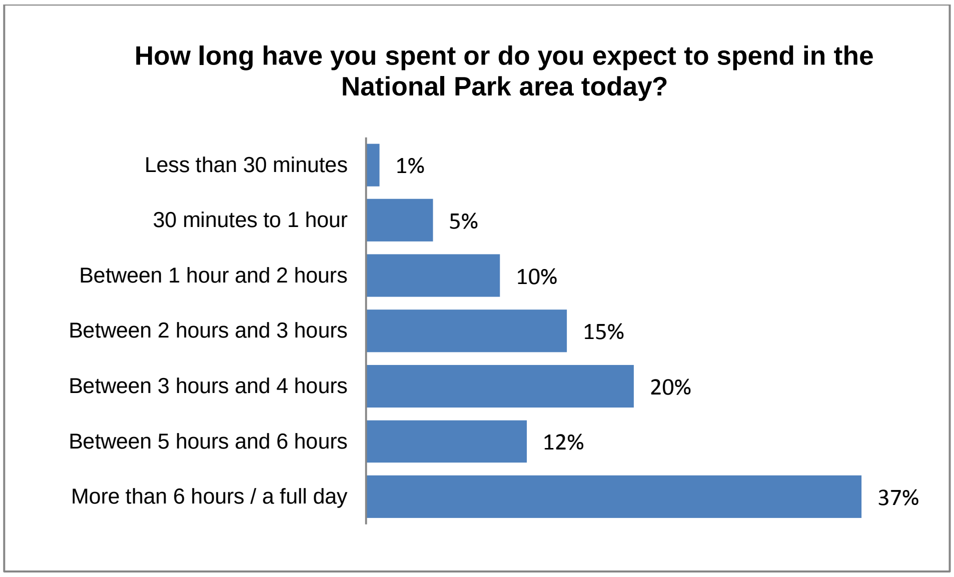
7.10 Locations visited by 3-5% of respondents were:

- Llangynidr / Talybont (4%)
- Llandovery (4%)
- Abercraf/ Craig Y Nos (4%)
- Llangorse Activity Centre/Lake (4%)
- Waun Fach and the Black Mountains (4%)
- Tal-y-Bont Reservoir (3%)
- Carreg Cennen Castle (3%)
- Torpantau (3%)

7.11 A range of other locations and sites were mentioned by 2% of respondents or less. A full list is provided in the Technical Appendices.

How long do they stay?

Seven in ten spend three hours or more in the National Park



Base:1707

7.12 Most respondents spend three hours or more in the National Park (69%) and over a third spend a full day. Staying visitors are more likely to spend a full day in the area (56%).

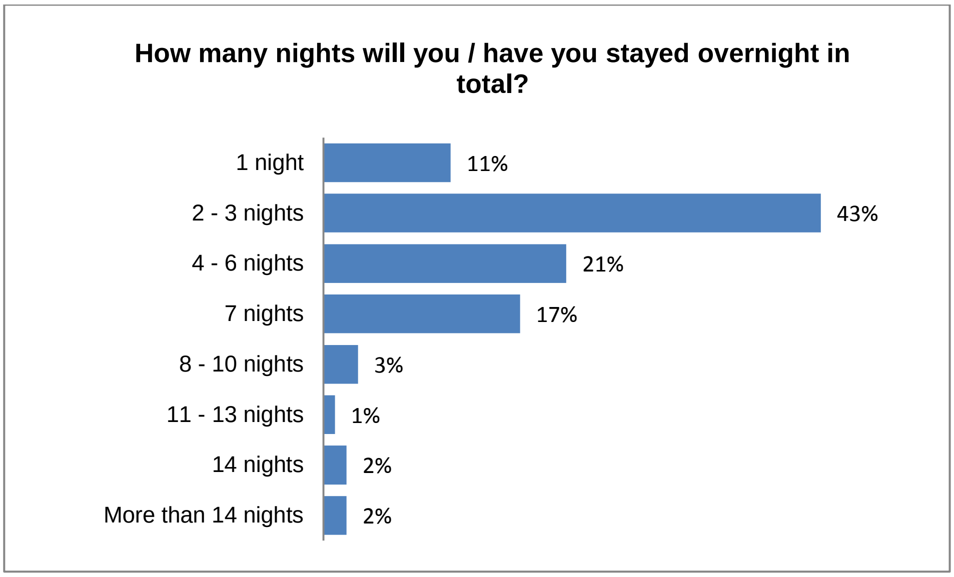
7.13 Locals have shorter visits and over half (53%) stay less than three hours.

7.14 Organised groups tend to spend a full day in the National Park (63%).

7.15 The amount of time spent in the National Park by day visitors varies with over two thirds staying three or more hours (68%). A fifth (20%) stay for a full day and the same again stay for 5-6 hours, but slightly more remain for 3-4 hours (28%).

7.16 Half of winter visitors spend more than three hours in the National Park area compared to around three quarters of Summer and Autumn visitors.

Most popular overnight stays are for 2-3 nights



Base:724, staying visitors

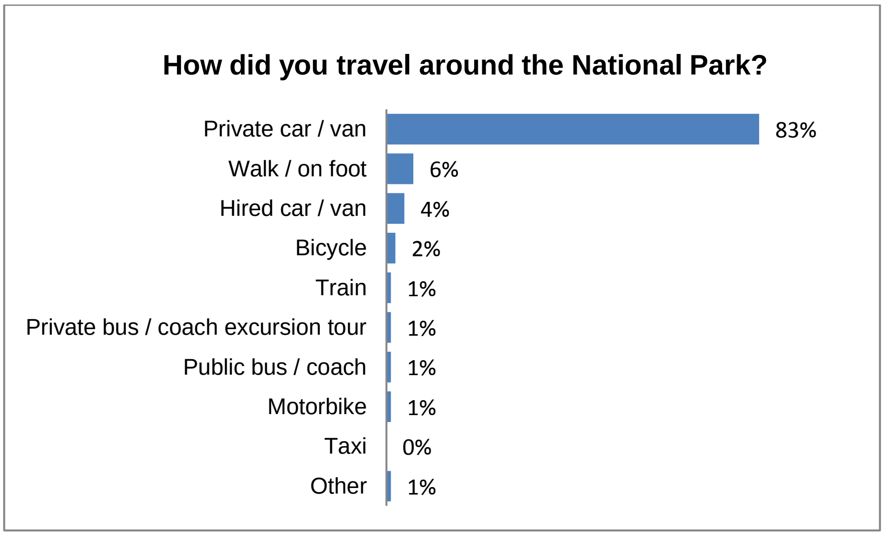
7.17 Over half of staying visitors take trips of up to three nights (54%).

7.18 Overseas visitors have longer stays with 29% staying 4-6 nights and almost a third (31%) staying seven or more nights.

7.19 Just under a quarter (23%) stay for seven or more nights, but those in groups of families without children (42%) or families with children (37%) stay the longest.

How do they travel around the Park?

Private cars are the most popular form of transport



Base: 1705

7.20 The majority of visitors used a private car or van to travel around the park (83%), particularly those from England (88%) but much less so for overseas visitors (46%) and organised groups (44%). Organised groups also use private buses (28%) and hired vehicles (10%) more often than others.

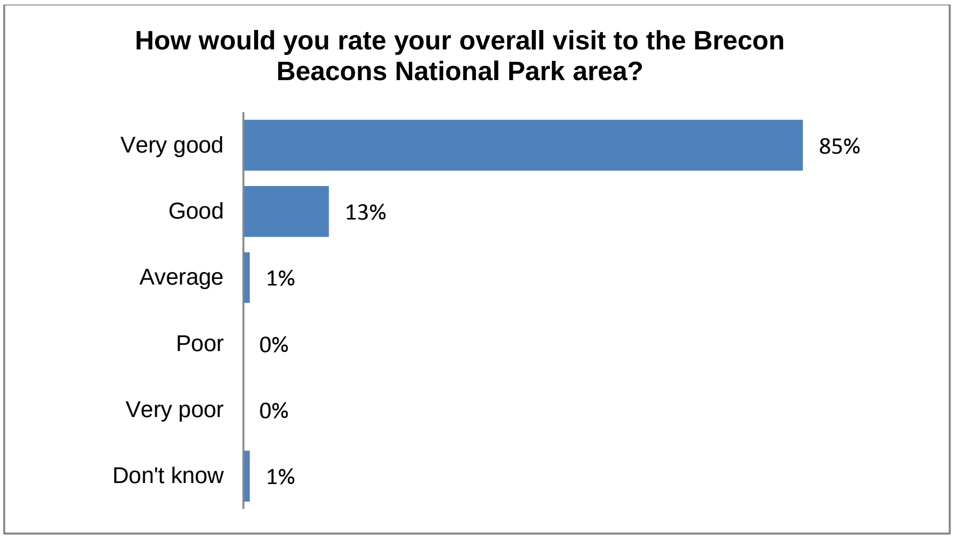
7.21 Overseas visitors use other modes of transport more often. Two fifths (41%) used a hired car or van and 5% used the train, which although still relatively small is the highest of all of the groups to use the train.

7.22 Those visiting alone are most likely to walk on foot (16%) and organised groups are also above the average (10%) on this. A higher proportion of locals also go on foot (12%).

8. Visitor Satisfaction and Destination Perceptions

Overall visitor satisfaction

High ratings of overall satisfaction for the National Park



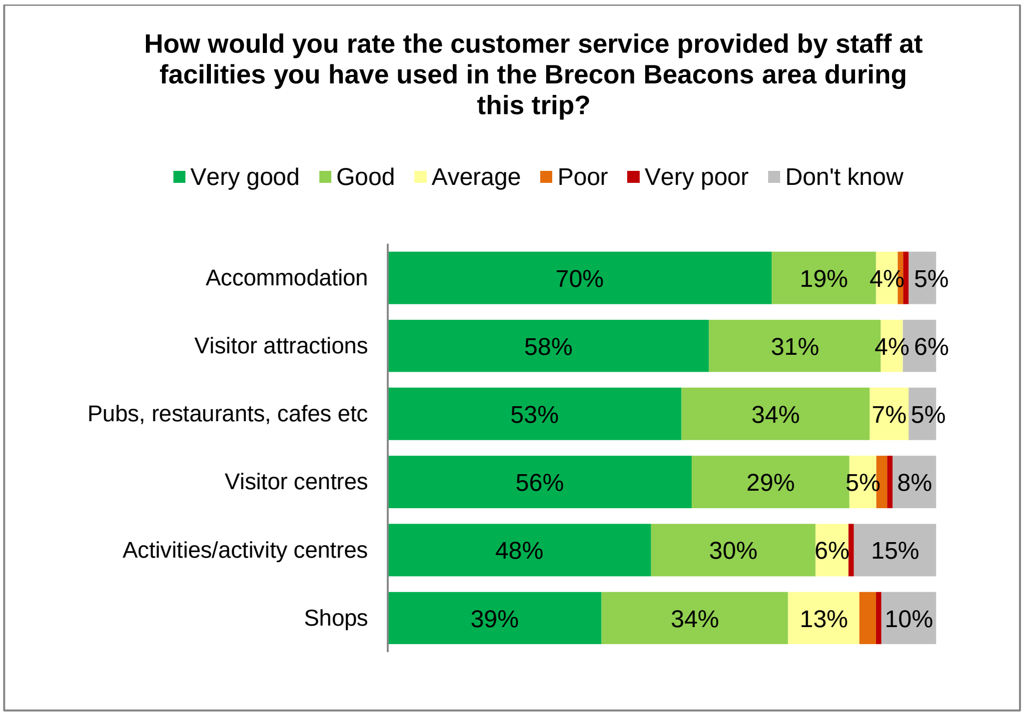
Base: 1706

8.1 The experience in the National Park area is rated very highly overall with 85% saying it was ‘very good’. First time visitors give a slightly lower rating (80%) with most of the remainder rating it ‘good’.

8.2 Particularly high ratings are given by some groups. More Winter visitors rate the area ‘very good’ (91%) than in other seasons as do those in organised groups (90%) and families without children (92%).

Customer service at facilities

Accommodation, attractions and eateries rated highest for customer service



Base: varies by facilities used from 708-1095

8.3 For this question, any respondents who answered 'not applicable' were excluded from analysis so that the results are based on those able to give an informed opinion.

8.4 Overall, there is very little dissatisfaction with the customer service at these types of facilities, although the proportion who say they don't know varies.

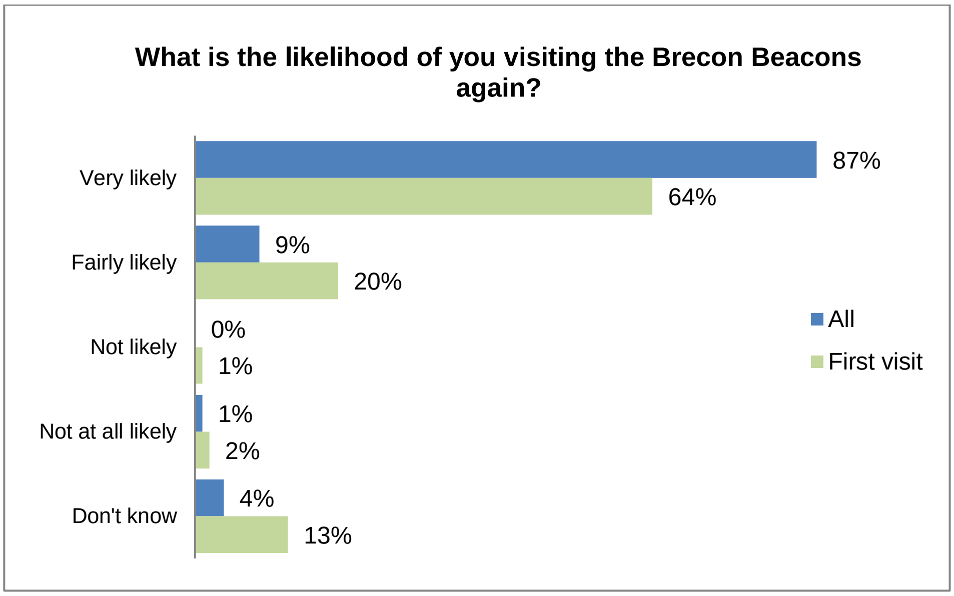
8.5 The highest ratings are given for the service at facilities which have the strongest connection with the tourist sector. Both accommodation and visitor attractions receive 'very good' or 'good' ratings from almost nine in ten (89%) although accommodation is given the highest 'very good' rating by some margin.

8.6 Customer service at accommodation facilities is rated more highly by visitors from England (93%) and overseas (91%) than those from Wales (79%).

8.7 Although still low at 4%, the most 'poor' and 'very poor' ratings were given for shops, along with 13% who said customer service in shops was average.

Likelihood of a return visit

Most are very likely to return but less so with first time visitors



Base: 1706

8.8 Overall a high proportion of visitors are likely to return to the Brecon Beacons with almost nine in ten (87%) saying this is 'very likely'. Most others say they are 'fairly likely' to do so. However, the balance between these responses varies by the number of previous visits made. Just under two thirds of first time visitors (64%) say they are very likely to return compared with 96% of those who have been four times or more.

8.9 Around eight in ten staying visitors (79%) are 'very likely' to return

8.10 Looking at the type of visitor party, the highest proportion who say they are 'very likely' to return are lone visitors (94%) and families without children (94%) with others just below the average (83%-85%).

8.11 By origin, 94% of those from Wales say they are very likely to return compared with 84% in England and 48% of overseas visitors. A quarter of those from overseas say they don't know (24%).

Likelihood to recommend

Most visitors are likely to recommend

8.12 A Net Promoter Score (NPS) question was asked of all participants to determine the likelihood they would recommend the Brecon Beacons National Park to others based on a score of zero for 'not at all likely' to 10 meaning 'extremely likely'.

8.13 This information was then use to calculate the NPS score as follows:

- Promotors (scores 9/10) = 85.6%
- Passives (scores 7/8) = 12.9%
- Detractors (scores 0-6) = 1.5%
- NPS score = Promoters – Detractors resulting in a **+84 score**

8.14 The NPS score for the Brecon Beacons National Park is very high suggesting that positive referrals via word of mouth are very likely.

8.15 Analysis by type of visitors shows that locals give the highest NPS +88 compared to +83 for day visitors and staying visitors.

8.16 Looking at visitor origin, those from Wales and England have a +85 score, but overseas visitors are +76.

8.17 On visit history, first time visitors have a +77 NPS compared to +88 for those who have visited four or more times.

Favourite things about the Brecon Beacons

Landscape, beauty, unspoilt environment and relaxation are most liked

8.18 Survey participants were asked in an open question what they most like about the Brecon Beacons. Comments have been coded into broad themes which are shown below as a proportional word cloud.

8.19 Clearly, many of the same factors which were given as key motivators for visiting are also reflected here. Taking in the surroundings and the positive effect on wellbeing are overlapping themes in many of the comments.

8.20 Almost half comment that the favourite thing about the area is the landscape and beauty of the National Park (46%).

8.21 Linked to this, the unspoilt environment and fresh air were mentioned by around a fifth (18%). The ability to find peace, quiet and relaxation is also a much mentioned factor (16%).

8.22 The activities on offer are mentioned by 14% and the mountains and hills are specifically mentioned by 8% although this is also implied for many when they refer to the beauty of the landscape.

8.23 Receiving a warm welcome from friendly locals is also mentioned by 5% as a positive aspect of the area. Other factors mentioned are more varied but by fewer than 5% of respondents.

8.24 Some quotes below illustrate these comments:

"I love walking on the mountains. Local people are friendly and there are very interesting local towns."

"Fabulous area with terrific scenery and a chance to get away from the rat race."

"It's beautiful and varied and you can feel remote but you're never actually far from help (or the pub!) if needed!"

"Amazing landscapes so close to city."

Areas for improvement

Many like it is but some would like to see toilets, signage and better maintenance

8.25 Respondents were asked about anything they would like to see improved to make their visit more enjoyable. As before, responses were coded into themes and are summarised below:

Area for improvement	%
None – keep it as it is	37%
Don't know/unable to answer	20%
More toilets/better maintenance and cleanliness of toilets	9%
Better signage and information	7%
Better maintenance and upkeep of paths, general cleanliness/litter	6%
Better parking management/less expensive parking	6%
More amenities e.g. visitor information, cafes and better opening hours	4%
Improved WiFi and phone signal	3%
Other suggestions include: improved public transport, more activities/paths for walkers and cyclists, better traffic management, more child friendly activities, more dog friendly	

8.26 Over a third of respondents said they had no suggestions because they are very happy with the area as it is, many commenting that they don't want it to be changed or spoilt. A fifth said they did not know and had no suggestions.

8.27 Those who did have suggestions are particularly keen to see better maintenance and enhancements of existing infrastructure such as toilets, signage and information, paths and general cleanliness and litter handling.

8.28 Parking is an issue for some, particularly around hot spots such as Storey Arms. Some areas of the National Park are considered expensive for parking.

8.29 Some of the comments are shown below to illustrate these points:

"Absolutely nothing! It's perfect"

"Car parking at Pont ar Daf is terrible, cars parked on grass verges along the main road for a mile in each direction, this is dangerous especially for people with children or dogs to cross the road and get in and out of car safely."

"Signs on walk paths are very poor – it's very hard to find the way, especially on country path's crossroads."

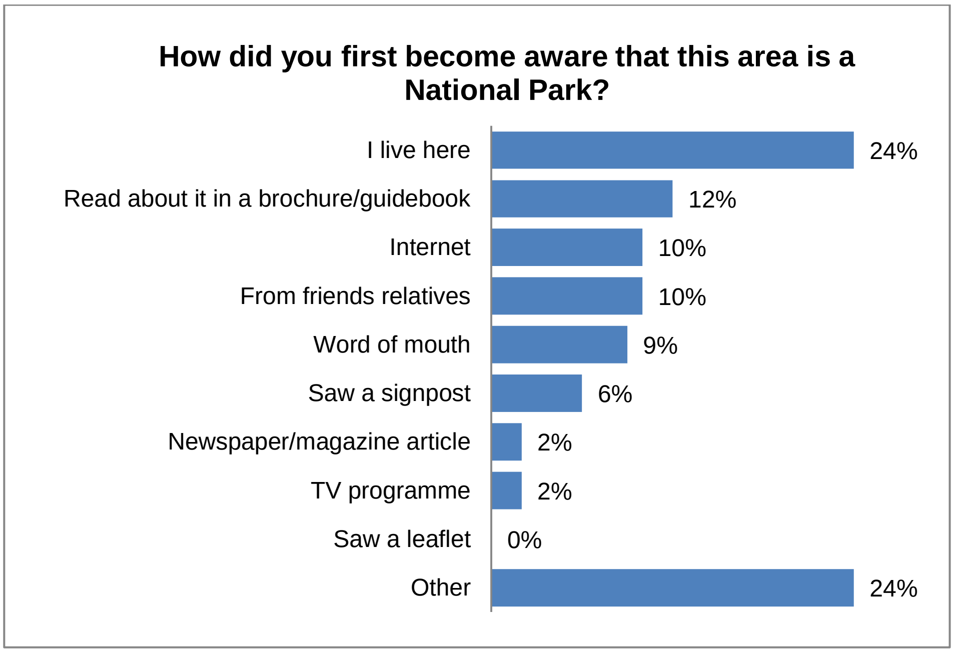
"Better pathways. More information boards. Better parking areas needed. More toilets. Some benches to sit on. More passing places on the roads."

9. Awareness and Views on the National Park

Awareness

9.1 All participants were asked if they were aware that they were in or had visited the National Park. Awareness is high with 93% indicating that they were aware of this but was slightly lower for those on a first visit (89%), second visit (87%) and those from overseas (88%).

9.2 Almost all of those aware of the National Park status knew of this before they visited (97%), although slightly less so amongst staying visitors (95%), those on their first visit to the National Park (93%) and visitors from England (95%).



Base: 449 respondents (online only)

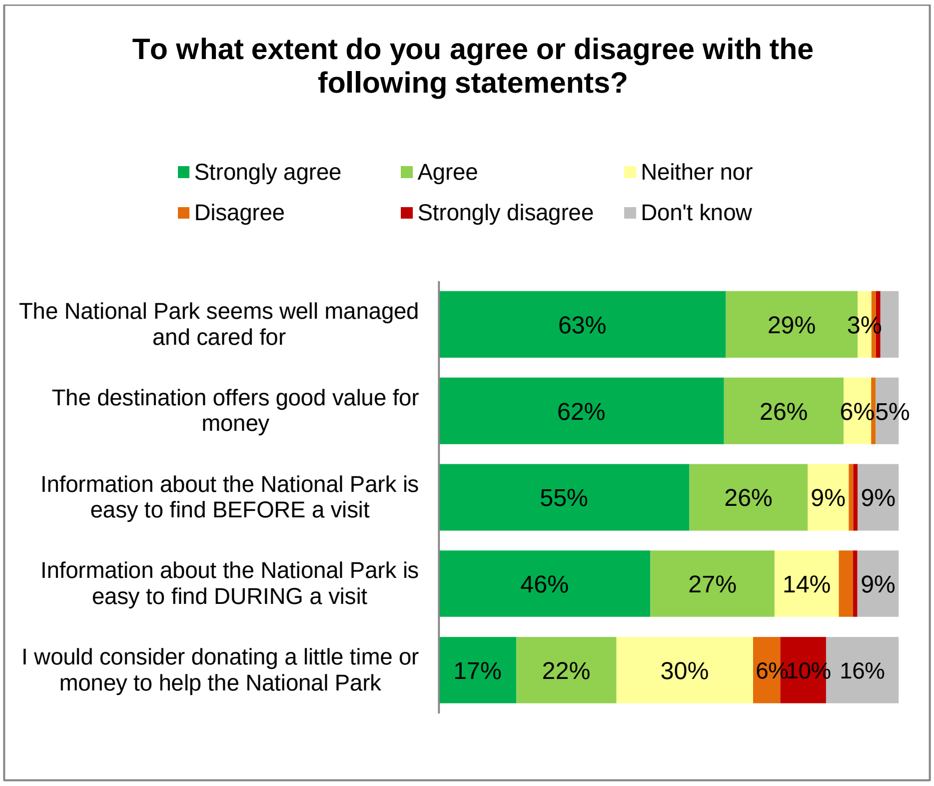
9.3 Other than being local, the main ways in which participants became aware of the National Park status was through brochures and guidebooks, the internet or through third parties either from friends and relatives or word of mouth.

9.4 Staying visitors were more likely to have heard through brochures/guidebooks (17%) and the internet (17%) as were visitors from England (16% and 15% respectively). Those on a first visit were also more likely to have found out via the web (26%), from friends and relatives (14%) or guidebooks (12%). Two fifths of Welsh visitors (42%) say they know about the National Park because they live in the area.

9.5 Many of those giving 'other' as a response can't pinpoint when they first became aware as they've 'always known' or say that they have visited the National Park many times before. Other respondents mention a few other ways of becoming aware of the National Park status such as maps, through school/education, expeditions such as Duke of Edinburgh.

Perceptions of the National park

Generally a positive impression of the National Park



Base: Variable 1705-1707

Most agree that the park is well cared for

9.6 Over nine in ten (92%) visitors agree to some extent that the National Park is generally well managed and cared for with just 2% disagreeing.

9.7 There are no major variations by type of group or other factors although a slightly lower proportion of those on their first visit agree (88%) but the remainder mostly don't know rather than disagree. This is similar for overseas visitors (87%).

Nine in ten agree the destination offers good value for money

9.8 Most agree to some extent that the destination offers value for money (88%) with only 1% giving a negative response although 6% neither agree nor disagree and a similar proportion say they don't know (5%).

9.9 Again, there is no major variation at sub group level, but although most of those visiting with families with children (88%) found the area good value for money, 3% disagreed. First time visitors are slightly less likely to agree (84%) but less than 1% disagreed.

Information about the Park is easy to access for most but minority undecided

9.10 More respondents agree that information is easy to access before a visit (81%) rather than during a visit (73%).

9.11 Although few disagree on the ease of access to information before (2%) or during their trip (4%), there is a significant minority who neither agree nor disagree and one in ten do not know. This may suggest that ease of access to information may be variable, particularly during visits.

9.12 There is little difference by group type and demographics for those that do not find information easy to access. However, there are differences in the proportion that think information is easily accessed with the balance falling into the 'don't' know' and neither/nor groups. With a high level of repeat visitors who know the area well, it could be that they have not looked for information and are therefore undecided or cannot say.

9.13 Day visitors are the least likely to agree that accessing information during a visit is easy (66%) and the most likely to disagree (6%). Just 3% of staying visitors disagree.

Some interest in volunteering time and money, particularly amongst locals

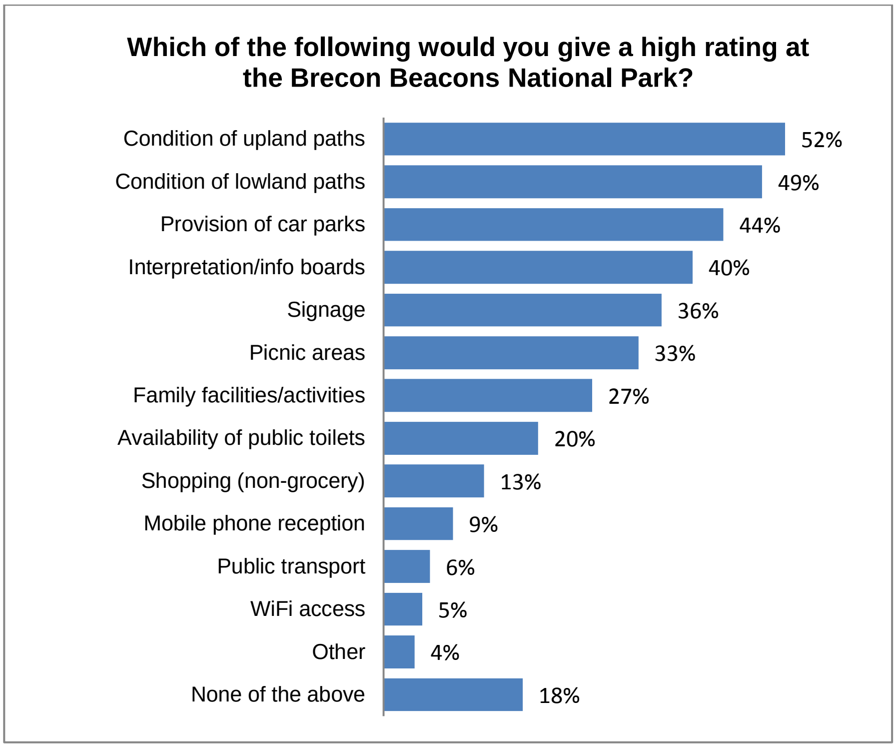
9.14 Overall two fifths (39%) say that they would consider donating time or money to help the National Park, rising to 49% of locals. Levels of interest in this also vary by visit history as those who have visited the most show most interest.

9.15 This also varies by season with Springtime visitors showing the most interest with over half saying they would consider helping out (56%) compared with 32% in Autumn, 40% in Winter and 38% in Summer.

Visitor Infrastructure

9.16 Respondents were shown a list of different aspects of the visitor infrastructure and asked which they would give a high rating to and then which they thought needed to be improved.

Highest ratings for paths and car parks, but few rate mobile reception, public transport or WiFi highly



Base: 1707

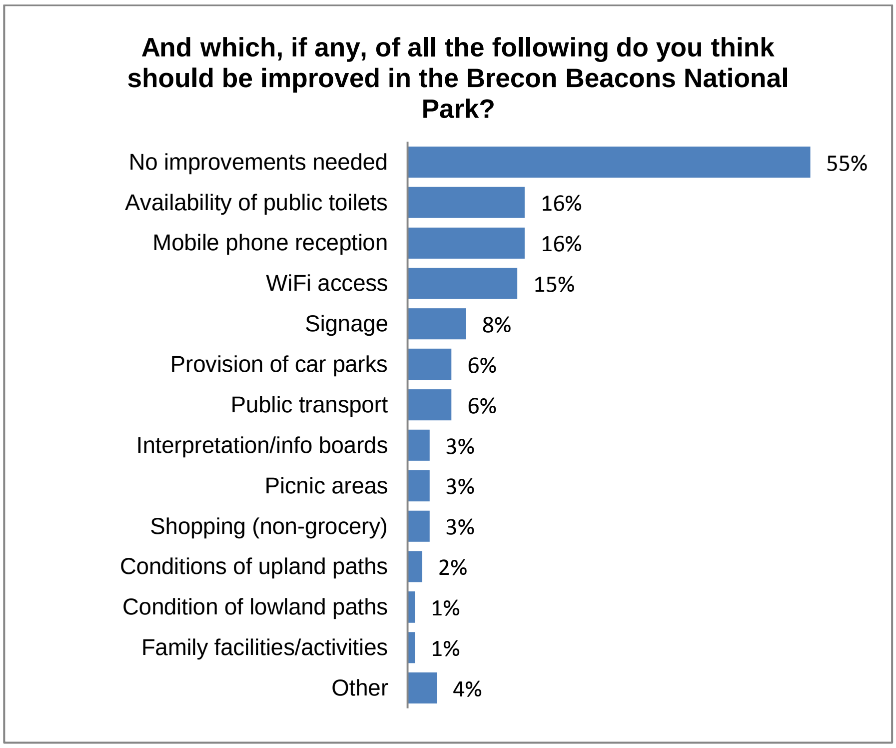
9.17 The highest ratings are given for the conditions of the upland and lowland paths by around a half the respondents. More day visitors rate the condition of upland paths highly (58%) than residents (47%) or staying visitors (49%).

9.18 Fewer locals rate the provision of car parks highly (37%) compared with day visitors (46%) and staying visitors (44%).

9.19 Information boards, signage and picnic areas are rated highly by a third to two fifths of respondents but fewer than three in ten rate other features highly. Less than one in ten say that they would give a high rating for connectivity through mobile signal, WiFi and public transport.

9.20 Almost one in five (18%) say they would not give any of these features of the park a high rating, rising to a quarter of locals (26%) and a little over a quarter of first time visitors (28%).

No improvements needed for half but toilets and connectivity are the main issues otherwise



Base: 1707

9.21 Although many of the aspects of visitor infrastructure were not particularly highly rated in the previous question, when asked what should be improved, many are not considered to be burning issues for attention either.

9.22 Whilst over half say no improvements are needed (55%), this varies by visit history. Almost two thirds of first time visitors (63%) see no need for improvements but this falls to around half (51%) for those visiting four or more times.

9.23 The availability of public toilets is particularly highlighted for improvement by day visitors (22%) and those visiting with organised groups (25%), families without children (19%) and friends (19%). It is also mentioned more by those visiting in Winter (23%).

9.24 There is only slight variation by party type for those looking for better phone reception. However, seasonally, around a quarter of Spring (23%) and Winter (25%) visitors mention this compared to 16% overall. The responses are similar for those looking for better WiFi access although higher again for Winter visitors (29%) compared to 15% overall. Those interviewed from organised groups were the most keen to see better WiFi access (24%).

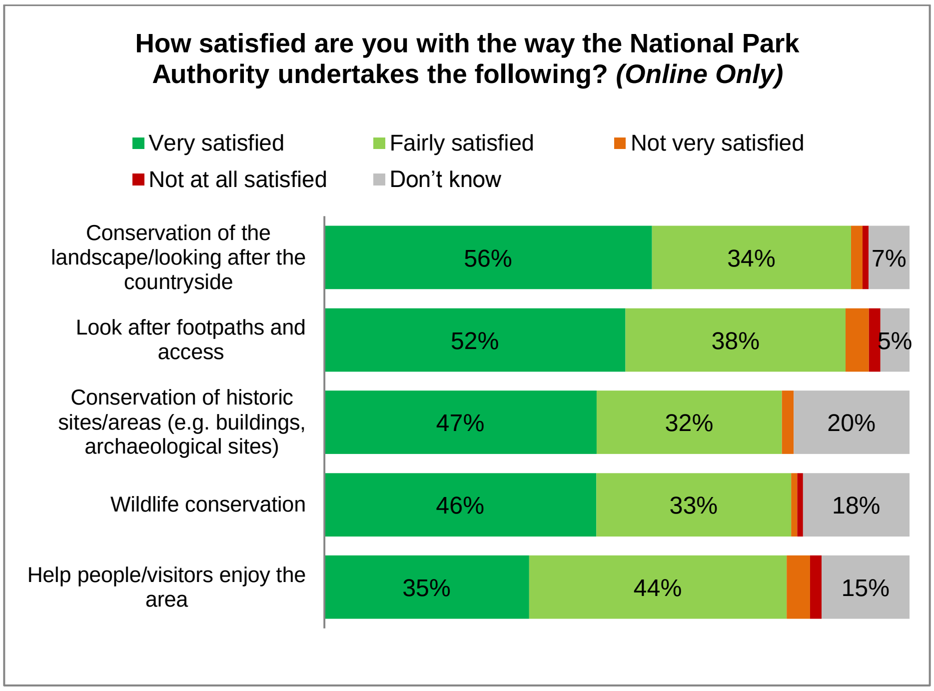
9.25 Signage is also mentioned by around one in ten (8%) but does not stand out as a major concern for any one group or type of visitor.

9.26 Provision of car parks is mentioned as an area for further improvement by more day visitors (10%) and locals (8%) than overall (6%). Public transport is an issue of concern for locals (11%) in particular.

Satisfaction with National Park Authority

9.27 Online respondents rated their satisfaction with the management activities carried out by the National Park Authority. For ease of reading, these have been ordered by satisfaction level and split into two charts which follow.

High satisfaction levels for conservation and management of footpaths and access



Base: 448-450 variable, online respondents

9.28 The highest satisfaction ratings are given for landscape conservation and footpath and access management with 90% giving a positive rating. Just 3% are dissatisfied with landscape conservation, but this is higher for locals (7%).

9.29 In general, locals tend to have a better knowledge of the area so give fewer 'don't know' responses. They sometimes give higher satisfaction ratings in general but although still relatively low, they also give more negative ratings than visitors overall.

9.30 On footpaths and access, although overall 90% are satisfied, a small number are not (6%) and this is more evident amongst locals (10%).

9.31 On conservation of historic sites or areas, locals are most satisfied with the NPA (90%) compared to 79% overall, they also seem to have more informed views as only 8% say they don't know compared to a fifth overall (20%).

9.32 Around four in five (79%) are satisfied with the NPA on wildlife conservation. Locals express both the highest satisfaction (85%) and most negative views (7%) compared to 2% overall.

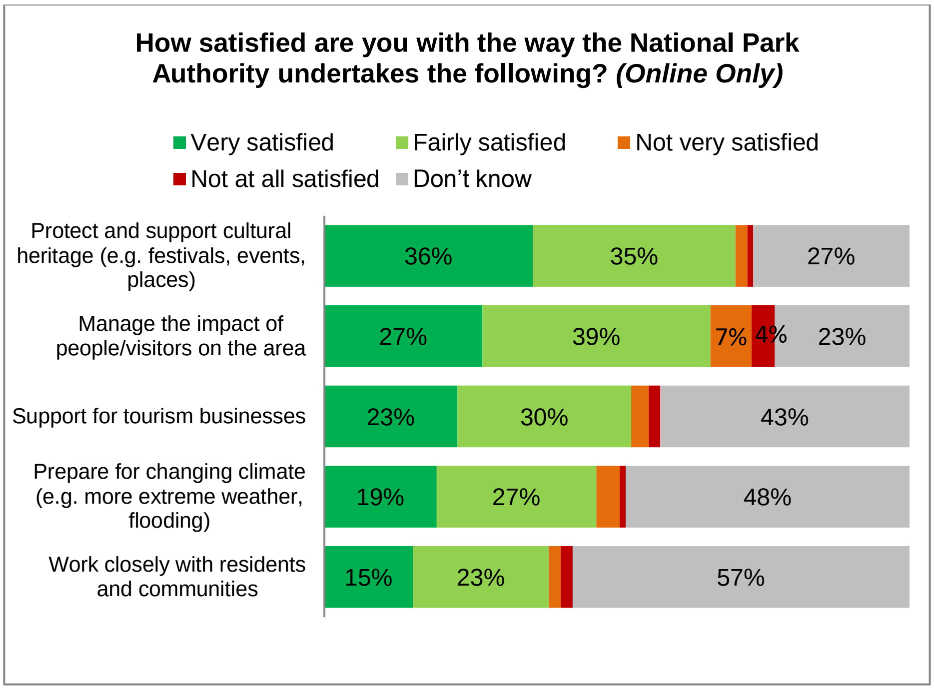
9.33 A similar proportion (79%) are satisfied that the NPA helps people or visitors enjoy the area. Around the same proportion of locals are satisfied (81%) but 12% are not compared to 6% overall. This compares with 82% and 4% of staying visitors.

9.34 Comparing with the results of the last National Park Authority Residents Survey in 2013[1], satisfaction amongst visitors, even amongst locals, tends to be much greater on all of these activities. In the residents survey satisfaction ranged from 71% to 80% and dissatisfaction from 9% to 17% for these questions.

Less awareness of activities, negative views on managing impact of visitors

9.35 The chart below shows the remainder of the satisfaction questions relating to NPA management. All of these had positive satisfaction ratings of 71% or less.

9.36 For many of these ratings, respondents had less firm opinions and there is a higher proportion of 'don't know' responses. This suggests that they are not aware enough of these NPA activities to give an opinion.



Base: 448-450 variable, online respondents

9.37 Protecting and supporting cultural heritage gets the highest ratings from locals (85%) who also give fewer don't know responses (13%). Almost two thirds of staying visitors (65%) are satisfied but a third don't know (31%).

9.38 Two thirds (66%) are satisfied with how the NPA is managing the impact of people or visitors to the area and this varies very little by the type of respondent. Most of these are 'fairly' satisfied. However, 11% are dissatisfied and this rises to around a fifth (19%) of locals, although 14% don't know. Staying visitors have the lowest dissatisfaction at 7%.

9.39 Just over half (53%) are satisfied with the NPA's support for tourism businesses, rising to 62% amongst locals. However, over two fifths (43%) say

[1] Brecon Beacons National Park Authority Residents Survey, MEL Research, 2013

they don't know with a high of 51% for day visitors. 5% overall are dissatisfied, but 13% among locals.

9.40 Just under half (46%) express satisfaction with the NPA's preparations for a changing climate, higher for locals (59%).

9.41 The NPA's activities to work closely with residents and communities is given the lowest satisfaction ratings of all (38%) but 57% don't know. Amongst locals, however 61% are satisfied to some degree but 11% are dissatisfied.

9.42 Comparison with the 2013 Residents Survey shows that, overall, satisfaction is generally higher for these NPA activities amongst visitors, even local visitors who tend to show the most dissatisfaction. Satisfaction in the Residents Survey was lower and ranged from 39% to 66% and dissatisfaction from 10% to 32%.

9.43 However, on the NPA '*managing the impact of people or visitors to the area*' a larger proportion of 'locals' in the visitor survey were both satisfied (67% compared to 59% in the Residents Survey) and dissatisfied (19% compared with 16%) and there were fewer 'don't know' responses. On the NPA's approach to '*working closely with residents and communities'*, locals in the visitor survey were more satisfied (61%) than those in the Residents Survey (41%) and also less dissatisfied (11% compared with 32%).

10. Visitor Spend and Party Size

Visitor spend

Visitors staying within the park spend more than other groups

10.1 Visitors were asked to indicate what they had spent during their visit, broken down by type of expenditure. Recall and estimation of spend is not necessarily an easy task for visitors. Where they could remember spending something but not how much, the details were left blank and therefore not included in the calculations. Where they knew they had spent nothing in a particular spend category, then a zero was entered which was included in the calculations.

10.2 Figures have not been rounded up or down due to the large impact which would result when using these figures to input into any other calculations.

10.3 For all categories of spend, staying visitors tend to spend more than other groups.

10.4 On average, staying visitors spent around £270 on accommodation but typically more if staying outside of the park (£313) and less if staying within the park (£219).

10.5 Food and drink is the next largest category of spend and visitors staying within the park are likely to spend more (£67) compared to those living locally (£13) or day visitors (around £14).

Type of expenditure	All	Living locally or resident	Day visitor	Staying within park	Staying outside park	Average Party Size (those providing spend data)
Accommodation (overall price)	£270.76	-	-	£219.26	£313.68	2.9
Food and drink*	£35.58	£13.17	£14.56	£67.14	£52.07	2.6
Entertainment/ attractions*	£9.82	£4.43	£4.22	£21.67	£13.14	
Tourist shopping*	£10.36	£2.96	£5.94	£18.67	£19.58	
Transport in the area*	£8.25	£2.73	£4.47	£12.91	£21.98	
Other purchases*	£11.26	£7.04	£5.59	£23.54	£18.21	

*Average price per day. Base variable.

Party size

Average party size

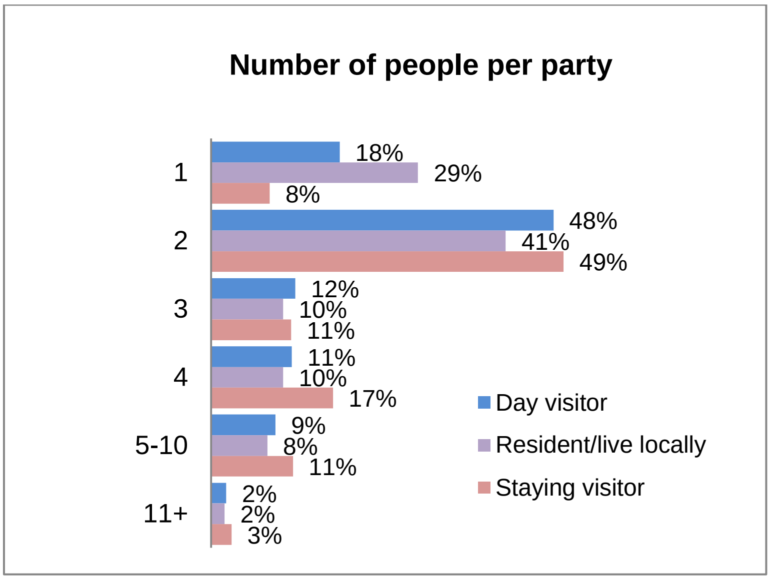
10.6 Based on information gathered about the **party** rather than the **respondent**, the average party size is 3.2 people with some variation by visitor type. Staying visitors have slightly larger party sizes (3.4) and locals are typically slightly smaller at 2.8:

Visitor Type	Average Party Size
Living locally or resident	2.8
Day visitor	3.0
Staying visitor	3.4
All visitors	3.2

10.7 Party sizes range from 1 to 78 people. Over 50 organised groups were included within the overall sample and these typically have a larger group size.

Number of people per party

10.8 The number of people in each party varies by type of respondent. Around half of day visitors and staying visitors are in parties with two people, but these are not always couples. Three in ten locals (29%) are visiting alone and almost a fifth (17%) of staying visitors are in a party of 4 people.



Base: 1703

11. The National Trust and Pen y Fan

Membership and Awareness of the National Trust's Role

Membership of the National Trust

11.1 Face to face participants were asked if they were members of the National Trust (NT). Overall 15% said they are. This was highest amongst staying visitors (18%) compared with locals (14%) and day visitors (11%).

11.2 Visitors from England were also more likely to be members of NT - 24% compared to 10% in Wales. No visitors from elsewhere were members.

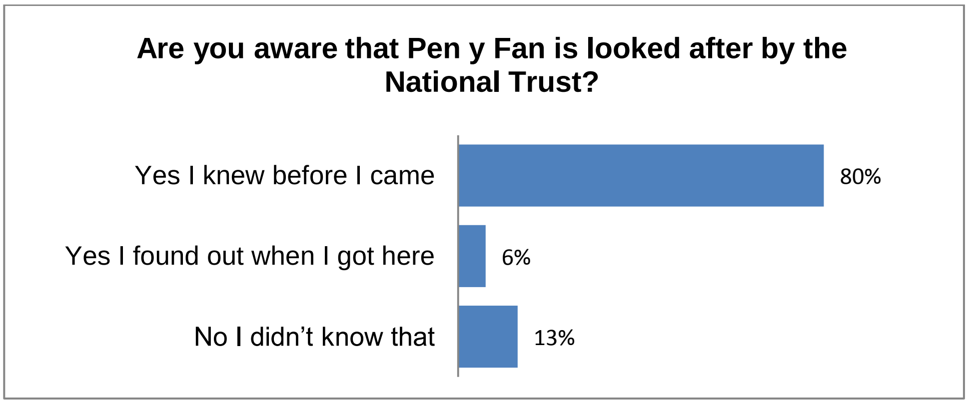
11.3 According to party type, lone visitors were the least likely to be members of NT (9%) with respondents from organised groups most likely (18%) all others groups are on or around the average of 15%.

Good awareness prior to visit of who looks after Pen y Fan

11.4 Respondents at Storey Arms were asked whether they knew that Pen y Fan is looked after by the National Trust. The majority knew this before they came.

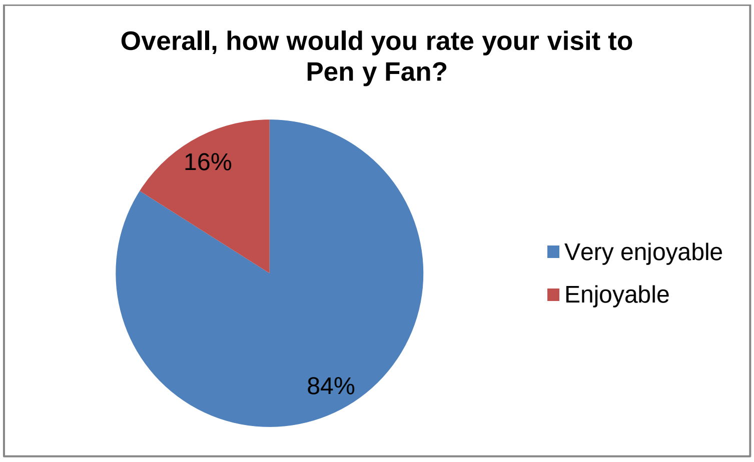
11.5 However, first time visitors have lower awareness with just 68% knowing about the role of NT before they came, 10% finding out when they arrived and 22% unaware when asked.

11.6 Fewer staying visitors were aware of the National Trust's role before their visit (73%) and just under a fifth didn't know (17%). Visitor origin also affects awareness of NT in looking after Pen y Fan with 85% of Welsh respondents aware before they came compared with 76% of English and 56% of overseas visitors.



Base: 210 (face to face respondents at Storey Arms only)

Most visitors said their visit to Pen y Fan was very enjoyable



Base: 210 (face to face respondents at Storey Arms only)

11.7 Visitors to Storey Arms were asked what they thought of their visit to Pen Y Fan. There were no negative ratings and most said they had a very enjoyable visit (84%).

11.8 There are no significant variations by type of group or demographics.

12. Conclusions

12.1 Although this report is largely intended as a benchmarking survey, there are a number of themes which run through the results.

Benefits of the outdoors, fresh air and space to breathe provide strong motivation to visit

12.2 Getting away from day to day life in a beautiful location relatively nearby is particularly attractive to visitors. There is a strong connection for visitors between improving wellbeing and exploring the outdoors – whether general sightseeing, walking or other activities. This is even more so for day visitors.

12.3 Eating is also a strong motivator, particularly for staying visitors who also tend to spend more on food and drink in the area.

NPA activities considered good on conservation, but less so on engagement and support

12.4 The NPA attracts high satisfaction scores for many activities, particularly on conservation.

12.5 Some visitors have little knowledge of some of the NPAs responsibilities and activities, resulting in a high proportion of 'don't know responses'. People are less clear about activities relating to cultural heritage, impact management, support for tourism businesses, climate change and community engagement.

12.6 Locals are more aware and give stronger positive and negative ratings of the NPA's performance.

12.7 Better engagement with locals and other visitors may help to raise awareness of the NPA's role and activities, whilst accepting that not all will be interested.

12.8 Although most are satisfied with the NPAs activities, '*managing the impact of people and visitors on the area'* gets the most negative response, particularly from locals.

Perceptions of the National Park are very positive overall, but some areas for attention

12.9 There is a very positive response to the Park, visitors have a good experience and it is likely that most will return. However, first time visitors are not quite as glowing in their ratings as others, nor are they particularly negative. This underlines the importance of making a good first impression to encourage repeat visits and for word of mouth recommendations.

12.10 Visitors particularly like the beauty of landscape and unspoilt nature of the Brecon Beacons.

12.11 There are few negative ratings on customer service at amenities, but shops have the lowest ratings suggesting there is scope for improvement. Visitors say amenities including cafes and shopping could be improved by expanding provision and having better opening hours.

12.12 Improving the availability and maintenance of toilets is the main area for improvement for around one in six visitors, particularly day visitors and those in organised groups. As well as providing or opening more toilets, visitors would also like to see them upgraded, better cleaning and in working order.

12.13 Signage and visitor information could also be better according to some visitors. Comments highlight the need for better maintained path signs to avoid confusion and people getting lost but also better road signs and directions. Improvements could be made to visitor information such as information boards, history, more detailed walking, running and cycling route maps and parking information.

12.14 General cleanliness and maintenance of paths and litter in the area is also highlighted. Specifically, visitors ask for more bins, including for dog waste, maintenance of paths and roads, canals and litter removal.

12.15 Both the cost and management of parking is frustrating for some visitors. They are looking for better parking facilities at very busy locations such as Pont ar Daf but also free or lower cost parking in other areas such as towns to encourage visits.

12.16 Connectivity is an issue and an area for improvement, particularly WiFi and phone signal. As visitors looking for information during their visit are most likely to use a smartphone, particularly staying visitors, this is an important point to address. Digital visitor information should also be optimised for smartphones to ensure the easiest access to information.

12.17 Although some visitors would like to see some enhancements to the Brecon Beacons, there is also a strong feeling of ‘keep things as they are’. Those who use the Park don’t want it to be flooded with tourists as it will spoil the very thing they like about the area. This is in keeping with the sustainable tourism approach which the destination is already committed to. xx