

BANNAU BRYCHEINIOG

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BRECON BEACONS

OUR NATIONAL PARK



Brecon Beacons National Park Visitor Survey 2016-17

April 2017

Background

- Study required to understand better how visitors use the National Park, where they go and what they do
- Requirement for robust and detailed evidence to inform:
 - Visitor Management Plan
 - National Park Management Plan
 - Sustainable Tourism Strategy

Objectives

- 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; include 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

Concurrent face to face and online surveys

- Primary method face to face interviews
- Secondary method online survey
- Interviews in peak and non-peak periods
- Over 1700 responses
- Highly robust

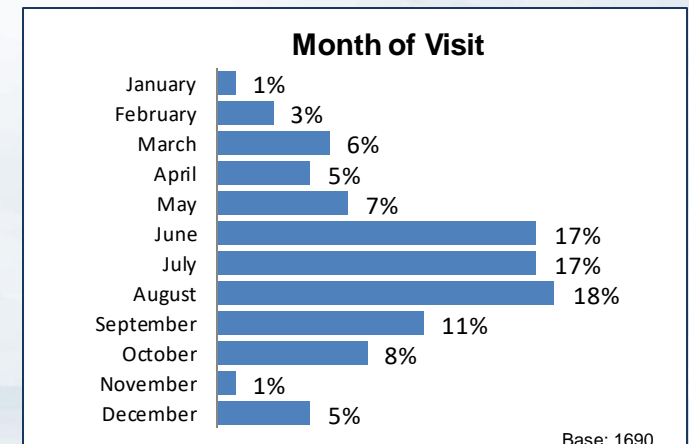
Method	Interviews	%
Face to face fieldwork	1256	74%
Online	451	26%
Total	1707	100%

Face to face survey

- Conducted across Brecon Beacons National Park
- Residents and non-residents
- Piloted in February 2016 conducted until December 2016
- Conducted on tablets

Online

- Live from March 2016 – beginning March 2017
- Promoted via social media, partners, offline cards
- Quarterly prize draw incentive



Good spread across the National Park

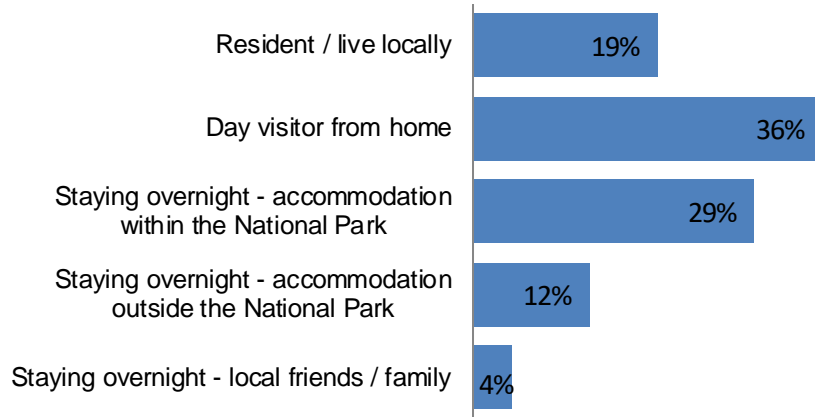
- 20 sampling points throughout the park plus online
- Footfall low in some
- Booster for Storey Arms
- Online responses have no specific location



Location of interview	Interviews	%
Brecon Town Centre	63	4%
Crickhowell	53	3%
Llandovery	54	3%
Abergavenny	55	3%
National Park Visitor Centre	57	3%
Hay-on-Wye	67	4%
Hay Bluff	44	3%
Storey Arms (Pont ar Daf car park)	210	12%
Talybont	57	3%
Talgarth	55	3%
Pengenffordd	36	2%
Llangorse	63	4%
Craig Y Nos Country Park	58	3%
Mon and Brec Canal: Goytre Wharf	49	3%
Waterfalls: Cwm Porth	51	3%
Keepers Pond	61	4%
Llanthony	75	4%
Torpantau	50	3%
Careg Cennen	46	3%
Gunpowder works	52	3%
Online	451	26%

Type of Visitor and Motivations

Which of these best describes the reason for your trip to the National Park?



Base: 1704

Over half are on a day visit from home

- 55% are visiting from home
- Remaining 45% are staying overnight, mostly within the park

MOST influence 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%

- Enjoying the outdoors** has most influence - particularly day visitors (67%) but less so with overseas visitors (44%) - more motivated by **visiting the National Park** in particular (60%) as are staying visitors generally (49%)
- Improving wellbeing** motivates day visitors (48%) and locals most (45%), staying visitors 34% - similar pattern for **physical health**

Main reasons for choosing the National Park

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%

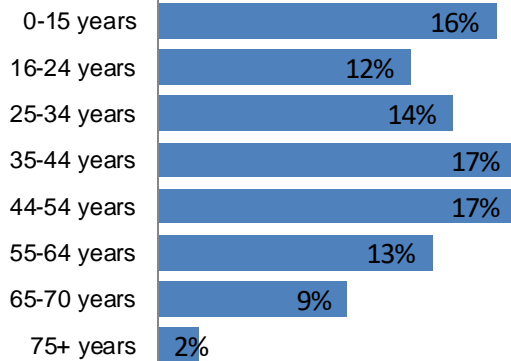
Reasons for choosing the BBNP	%
Walking along the canal	8%
Meeting up with friends/family	7%
Visiting friends/family	7%
Good variety of things to do for adults	6%
Never been /always wanted to visit	5%
Cycling biking	4%
Good variety of things to do for children	4%
Passing through/ stopping for a break	4%
Part of an organised trip	3%
Mountain biking	2%
Watersports	2%
Other	15%

Landscape, walking and previous experience are strong motivators to visit

- Scenery and beauty dominate
- Visits motivated by wellbeing and health too – healthy exercise most popular with day visitors (27%)
- Activities also attractive – upland walking most popular with day (35%) and staying visitors (36%), less so with locals (24%)

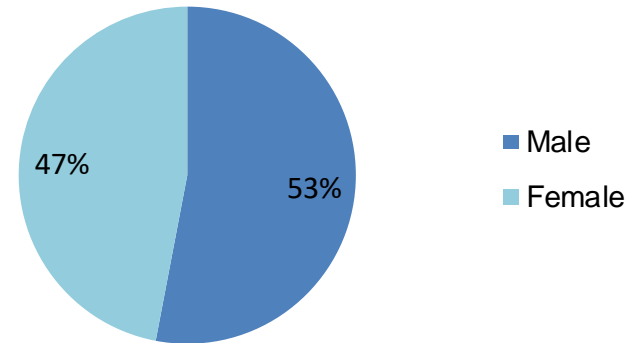
Visitor Demographics

Age group



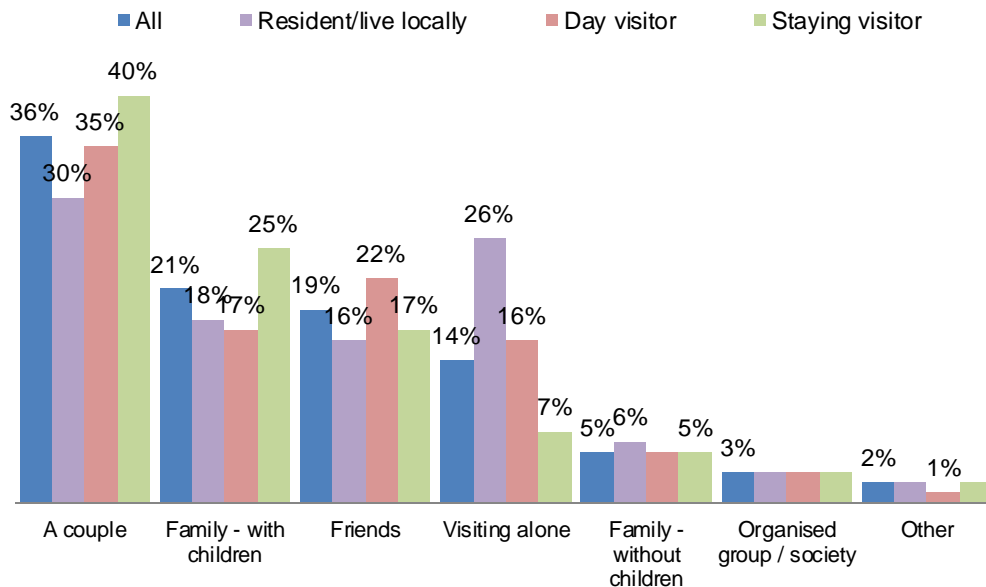
Base: 1653

Gender of respondents



Base: 1694

Which of the following best describes your party on this visit?



Base: 1702

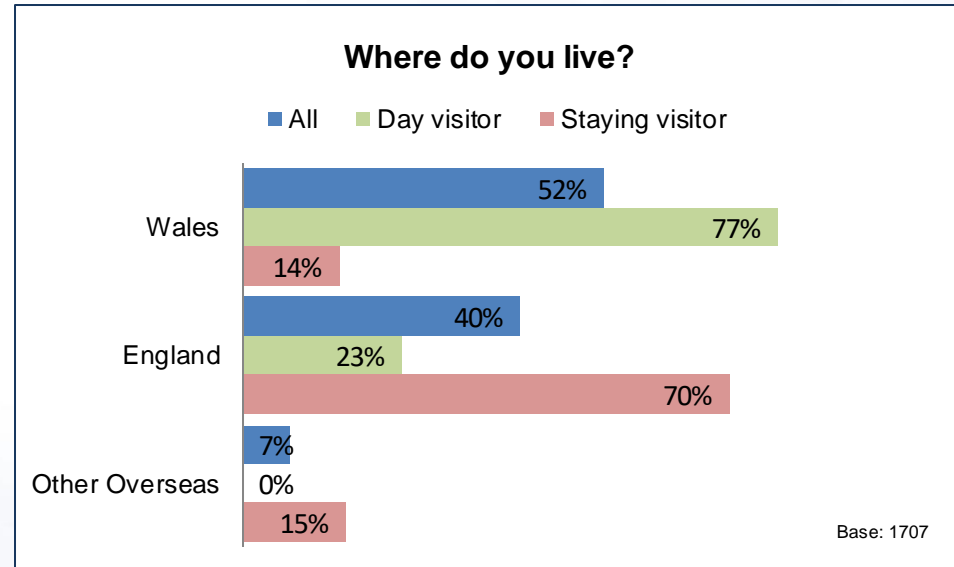
Type of party

- 40% **staying visitors** are couples and 25% are families with children
- 26% of **locals** are lone visitors and 22% day visitors are friends

Other demographics

- 47% of respondents are in AB social class, 27% in C1, 12% in C2, 6% in DE
- 70% are non-Welsh speakers, 15% are limited Welsh speakers, 4% intermediate, 5% advanced/fluent
- 23% visited with a dog

Country of Origin	No.	%
Wales	893	52%
England	690	40%
Scotland	2	<1%
Northern Ireland	2	<1%
Republic of Ireland	3	<1%
Other overseas	117	7%



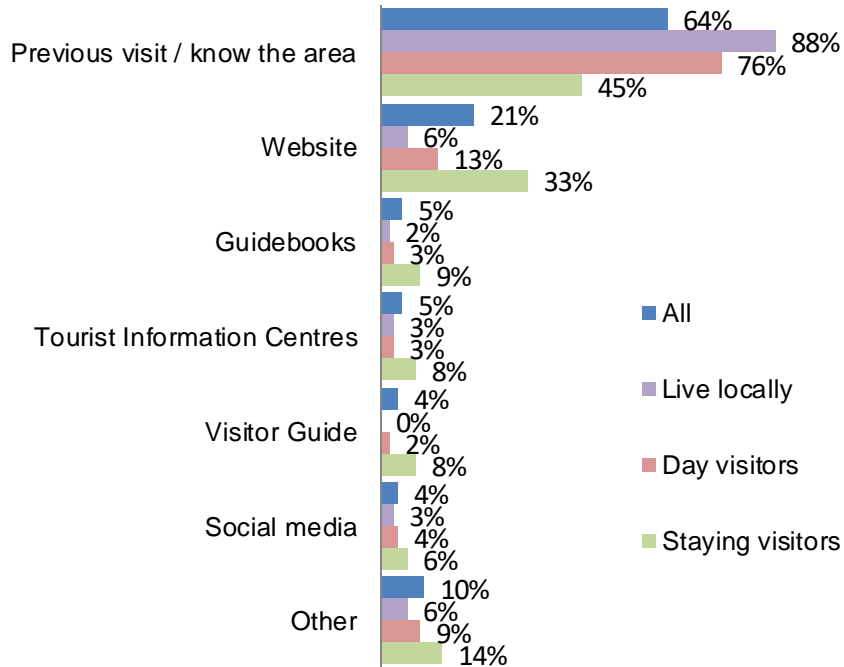
Visitors from Wales

- Powys (18%) most often, then Cardiff (13%), Swansea (10%), Rhondda Cynon Taf/Monmouthshire (both 8%) and Neath Port Talbot/Bridgend (6%)

Visitors from England – South West and South East most often

- Most common region is the South West (31%), then South East (27%), West Midlands (14%), Greater London (13%) and East Midlands (5%)

How did you plan your visit to the National Park?



Base: 1703

Majority plan their visit from recent experience

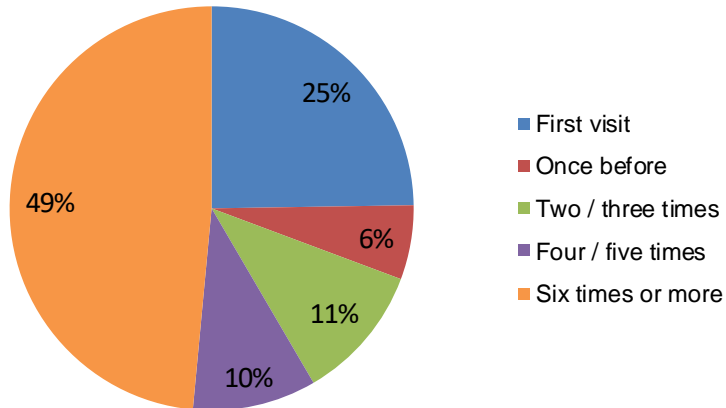
- A third of staying visitors use a website
- Offline resources most popular with staying visitors
- Local people typically use digital, if any

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%

Which websites?

- General web searches e.g. Google most popular, followed by Brecon Beacons website
- Accommodation websites include general sites e.g. Booking.com and more local sites
- 'Other' responses include local sites such as Visit Abergavenny and Crickhowell and Ordnance Survey

How many times have you visited the Brecon Beacons National Park in the last 5 years?

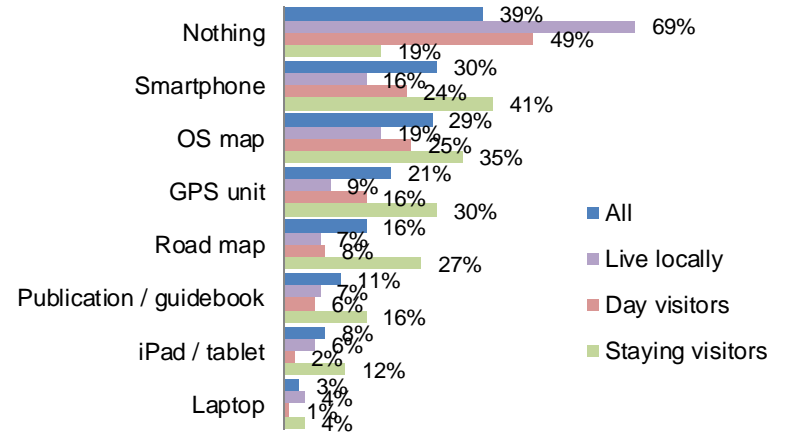


Base: 1701

Nearly half of visitors are frequent visitors

- 86% of locals have visited 6 times or more, compared with 62% day visitors and 23% staying
- A quarter were on their first visit, rising to 45% of staying visitors

Tools used to access information DURING visit

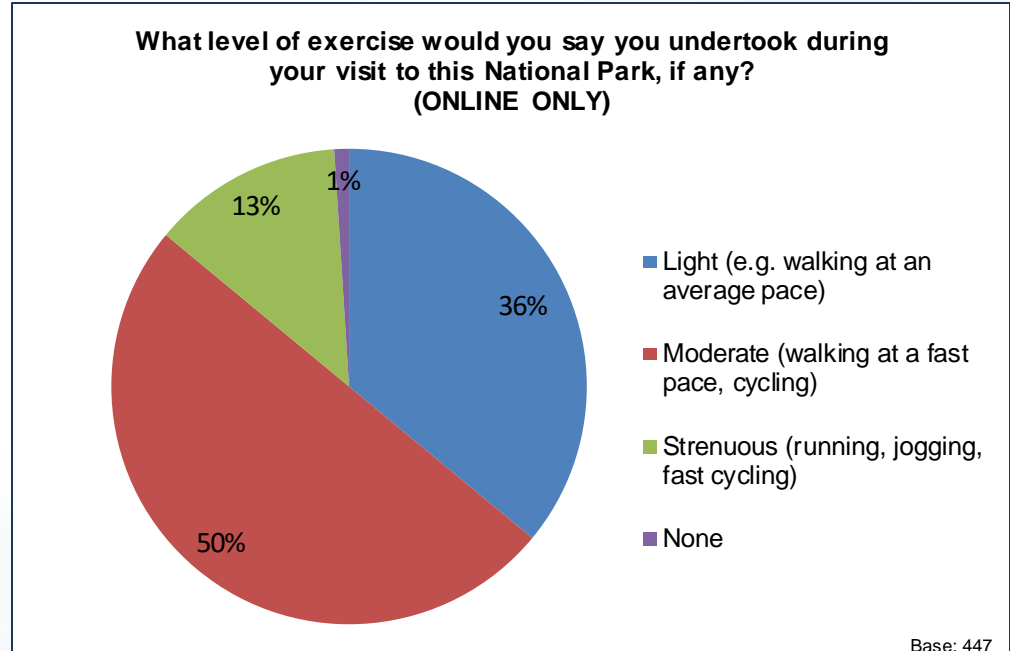


Base: 1704

Two in five don't use tools to access information during their visit, Smartphones and maps when they do

- Locals least likely to use tools (69%), also varies by visit history
- Smartphone use most popular (30%) especially for staying visitors (41%) and first time visitors (40%)
- OS Maps also well used, particularly day and staying visitors
- Guidebooks still used by 16% staying visitors

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 sight	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%



- General sightseeing most popular – particularly with staying visitors (56%) rather than locals (32%) or day visitors (38%)
- High level walking less popular with locals (19%)
- Eating out least common amongst day visitors (20%) but higher for staying visitors (32%)
- Visiting a town or village most popular with staying visitors (35%)
- Online survey shows strenuous activity most likely with locals (19%)

Top 20 Areas Visited	% Respondents
Brecon	23%
Storey Arms/ Pen Y Fan/ Corn Du	21%
Outside of the Brecon Beacons	12%
Abergavenny	10%
Hay on Wye	10%
Pontneddfechan/ Waterfalls/ Ystradfellte	9%
Brecon Canal	9%
Talgarth / Llangorse	9%
Crickhowell	8%
National Park Visitor Centre / Mountain Centre	7%
Pengenffordd/Keepers Pond	6%
Llanthony / Llanthony Priory	6%
Llangynidr / Talybont	4%
Llandoverly	4%
Abercraf / Craig y Nos	4%
Llangorse Activity Centre / Llangorse Lake	4%
Waun Fach/Black Mountains	4%
Tal-y-Bont Reservoir	3%
Carreg Cennen Castle	3%
Torpantau	3%

Mentioned by 1-2% respondents:

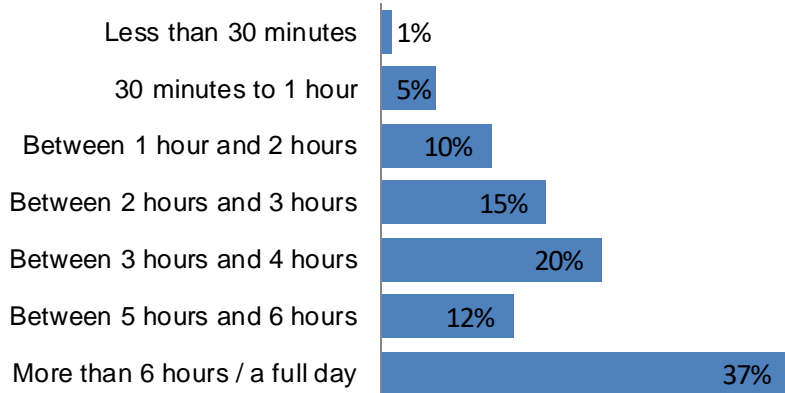
- Blaenavon
- Brecon Cathedral
- Brecon Mountain Railway
- Dan Yr Ogof – National Showcaves of Wales
- Hay on Wye bookshops
- Llandeilo
- Black Mountain Activity Centre
- Sennybridge / Trecastle
- Horseshoe Walk/Fan Y Big/ Cribyn/ Neuadd Reservoirs
- Merthyr Tydfil
- Usk Reservoir

Mentioned by <1% respondents:

- Abergavenny Museum & Castle
- Aberglasney Gardens
- Big Pit
- Brecon Museum (Brecknock Museum & Art Gallery)
- Brecon Theatre (Theatr Brycheiniog)
- Brynamman / Ammanford
- Cantref Farm & Riding Centre
- Cyfarthfa Castle
- Dinefwr Castle
- Garwnant Forest & Visitors Centre
- Llanddeusant Kite Centre
- Llandoverly Crafts Centre
- Offas Dyke Footpath
- Tretower Court

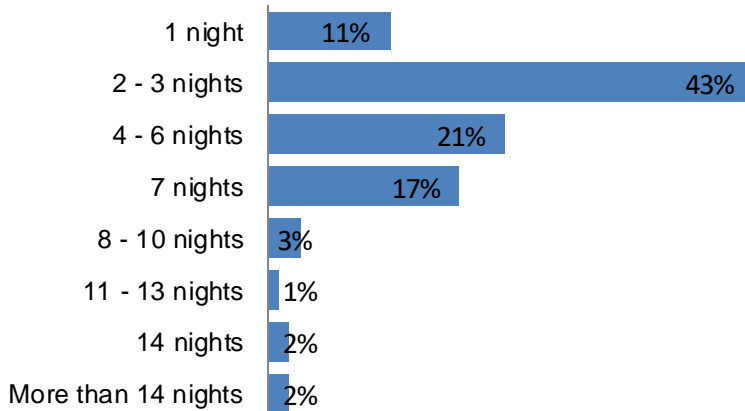
How long do they stay?

How long have you spent or do you expect to spend in the National Park area today?



Base: 1707

For those staying overnight, how many nights will you / have you stayed overnight in total?



Base: 724

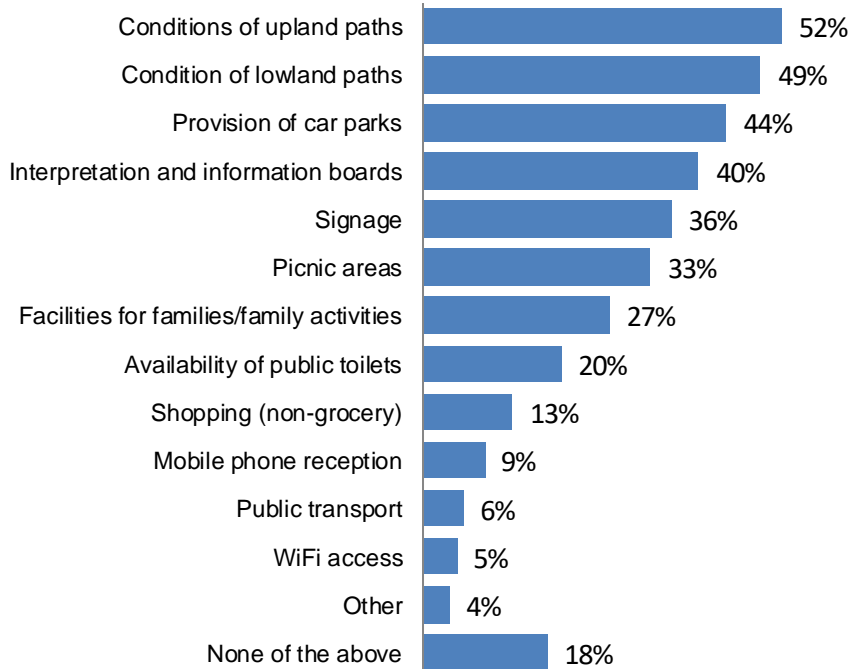
Most spend large part of the day in the Park

- Full days more often with staying visitors (56%)
- 68% of day visitors spend three hours or more in the National Park
- Locals have shorter visits – 53% stay less than 3 hours

Short stays are most popular

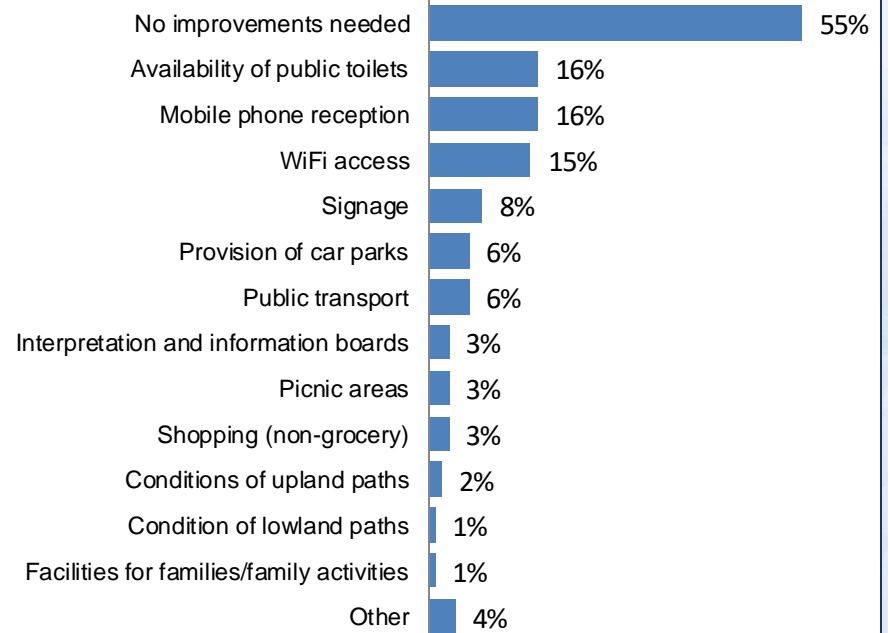
- Short stays up to 3 nights taken by over half (54%) of staying visitors
- Overseas visitors have longer stays 30% stay 4-6 nights and a third 7 or more nights

Which of the following would you give a high rating at the Brecon Beacons National Park?



Base: 1707

And which, if any, of all the following do you think should be improved in the Brecon Beacons National Park?



Base: 1707

Lower ratings and areas for improvement

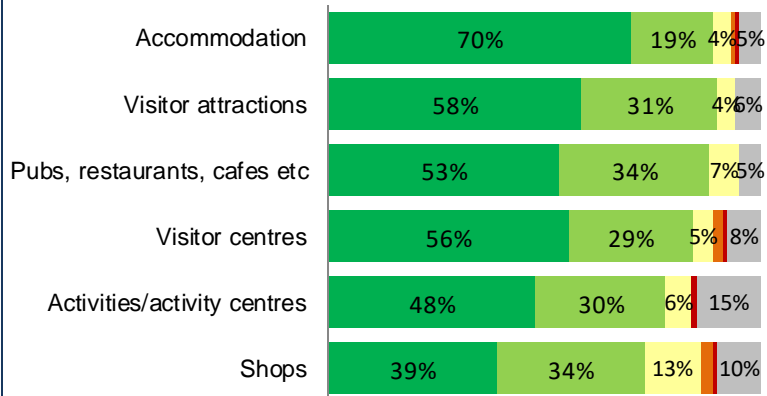
- Toilets
- Mobile reception and WiFi
- Signage

Also earmarked for improvement

- Car parks

Customer service at facilities

Very good Good Average Poor Very poor Don't know

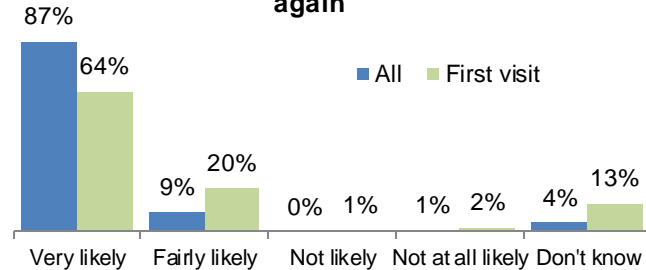


Base: variable

Customer service scores are very good

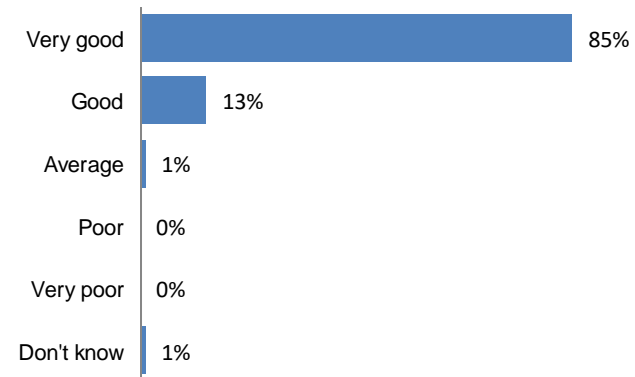
- Very good scores for those heavily linked with the tourist industry
- Lowest score is for shops, although still quite good

Likelihood of visiting the Brecon Beacons again



- Most are likely to return but first time visitors not as 'very likely' to
- Overall, high ratings for visitor experience, none negative

Overall visit to the Brecon Beacons National Park area



Beauty, scenery, views and landscapes

Unspoilt countryside and fresh air

Well maintained
Places of interest
Lots to do for all
Amenities and facilities
Everything
Variety
Wildlife
Other
Activities
Peace, quiet and relaxation
Friendly and welcoming
Mountains and hills
Easy access
History and culture
Dog friendly
Not over crowded
Safety
Night sky
Low cost and value

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

"Amazing landscapes so close to city."

Visitors most like:

- The landscape and beauty of the National Park (46%)
- Unspoilt environment and fresh air (18%)
- A place to relax and have breathing space (16%)
- The activities on offer (14%)
- Mountains and hills (8%)
- Friendly people and a good welcome are also mentioned (5%)

"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!"

Areas for improvement

"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."

Many have few suggestions for improvement

- Over a third had no suggestions (37%), want to keep it as it is
- A fifth didn't know or give an answer

Those that did would like to see

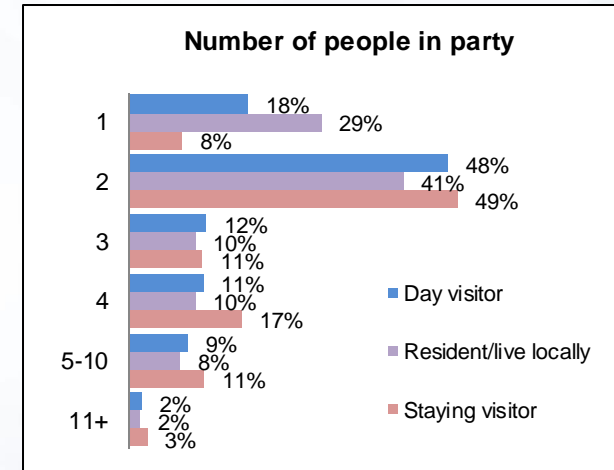
- More **toilets** and better maintenance and cleaner toilets (9%)
- Better **signage** and information (7%)
- Better maintenance and upkeep of **paths, litter and general cleanliness** (6%)
- Better **parking** management or less expensive parking (6%)
- More **amenities** available e.g. visitor information, cafes and better opening hours (4%)
- **WiFi** and phone **signal** (3%)
- Others suggestions - improved public transport, more activities/paths for walkers and cyclists, better traffic management, more child friendly activities, more dog friendly

Party size and visitor spend

Overall party size

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

- Larger party size for staying visitors
- Smaller groups for locals
- Party sizes range from 1 to 78



Spend per party

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.

- Highest spenders are staying visitors within the park
- Day visitor spend often low

"It's a relatively cheap family day out."

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

- Strong connection with wellbeing and the outdoors – whether general sightseeing, walking or other activities
- Connection with wellbeing is particularly evident for day visitors
- Eating out also important, particularly to staying visitors

Perceptions of the national park are very positive overall, but some areas for attention

- Beauty of landscape and unspoilt nature particularly liked
- Few negative ratings on customer service at various amenities, but shops have least appeal
- Toilets, WiFi, phone signal, signage and parking are key concerns
- Strong feeling of ‘keep things as they are’ and don’t flood the area with tourists – in keeping with sustainable tourism approach

Q&A and discussion

Suzanne Pritchard Director

E: suzanne@strategic-research.co.uk

W: www.strategic-research.co.uk

Dr Sunita Welch Education Manager
Brecon Beacons National Park Authority

E: sunita.welch@beacons-npa.gov.uk