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# BRECON VISITOR SURVEY 2008

Results  
December 2008

Survey supported by



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## INTRODUCTION

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This report presents the findings of a programme of research carried out by the Brecon Beacons National Park Authority (BBNPA) Tourism Growth Area in partnership with Brecon Chamber of Trade and also with the assistance of Tourism Partnership Mid Wales. The project has also received European Regional Development funding through INTERREG IV 8.

The research aimed to investigate the characteristics of visits and visitors to the Brecon area. The findings of a previous survey conducted in 2005 were published in a separate report. Separate reports are also available for two similar surveys carried out in Crickhowell and Talgarth in 2005 and in 2008.

### Objectives

The objectives for the survey were threefold:

- To gain insights into the characteristics of current visitors to Brecon.
- To examine the characteristics of different types of visitors.
- To inform future tourism planning for Brecon as part of wider promotion of the Brecon Beacons Tourism Growth Area.

### Methodology

The research took the form of a survey. Responses to the survey were gained in two ways:

- **Self-completion questionnaires:** Between the beginning of March and end of October 2008, several hundred self-completion questionnaires were distributed by volunteers and BBNPA staff to a number of locations around Brecon. Visitors could choose either to complete the questionnaire there and then, handing it back to an appropriate member of staff, or to use a freepost envelope to post it back.
- **Face-to-face interviewing:** In order to supplement respondents gathered via the self-completion forms, fieldworkers from market research company Interviewing Services Limited (ISL) used the questionnaire to interview a sample of visitors face-to-face. The interviews were conducted across three days during August 2008.

A total of 105 questionnaires were returned using the methods listed above.

## RESULTS

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This section presents the main findings of the 2008 research<sup>1</sup>. Figures from the 2005 survey have been included within brackets in many of the tables. Commentaries also make reference to 2005 figures where relevant.

One of the objectives for this study was to examine the characteristics and views of the different types of visitors. Specific segments that were investigated included:

- **Day trippers from home** – those travelling from and back to home in the same day for leisure purposes.
- **Holiday day trippers**– those taking a day trip to Brecon whilst on holiday elsewhere in the area.
- **Short break takers** – those staying 3 nights or less in Brecon.
- **Longer break takers** – those staying 4 nights or more in Brecon.

Holiday takers of one sort or another made up seven out of ten of the sample (71%). One third of the sample was on a short break (33%), with just over a quarter (27%) on longer breaks. Holiday day trippers accounted for 11% of the sample.

Day trippers travelling from home accounted for 29% of respondents. The remainder of the sample (less than 1%) were on other types of trips such as business.

In the main body of the report we focus on presenting the overall results from the total sample of 105 respondents. Due to the small sample sizes achieved for the individual categories of trip takers listed above and the consequent dangers of placing too much emphasis on the reliability of these results, they are included as Appendix 1.

### Characteristics of visitors

#### ► More females than males responded to the survey

- Just under two thirds of the sample were female (62%) with the remaining 38% being male.

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<sup>1</sup> The results of two open-ended questions included in the questionnaire are given in Appendix 1.

► **There was a good overall spread of ages amongst respondents but there was a skew towards older visitors**

For instance, two thirds of respondents (66%) were aged 45 years or over. This was an even higher proportion than was observed in the 2005 survey (54%). The table below provides more detail

*Table 1 Age profile of respondents*

Age	% of all respondents (2005 figs in brackets)
16-24	6% (5%)
25-34	12% (12%)
35-44	14% (23%)
45-54	16% (18%)
55-64	27% (22%)
65+	23% (14%)
No answer	3% (6%)
Total	101% (100%)

*Note: Percentages are rounded to the nearest whole number so totals may not add up to 100%. Sample size =105.*

## Transport used

*Table 2 Main mode of transport used by respondents to reach Brecon*

Transport mode	% of all respondents (2005 figs in brackets)
Car/van	91% (85%)
Regular bus/coach	3% (3%)
Bus/coach excursion	2% (3%)
Motorcycle	1% (2%)
Bicycle	1% (0%)
Walk	0% (2%)
Train	0% (1%)
Other	0% (1%)
No answer	3% (2%)
Total	101% (99%)

*Note: Percentages are rounded to the nearest whole number so totals may not add up to 100%. Sample size =105.*

► **The car/van was the dominant mode of transport used by respondents to reach Brecon**

- Over 9 out of 10 respondents (91%) used a car/van to reach Brecon. Use of the car/van was higher in the 2008 survey than it was in the 2005 survey, when 85% of respondents used this mode.
- This change is accounted for by very slight downwards shifts in minority choices of transport eg in the prevalence of walking amongst respondents (down to 0% from 2% in the 2005 survey), less use of trains (down to 0% from 1%) and fewer bus/coach excursions (down to 2% from 3%).

## Group composition

This section looks at the characteristics of the groups in which the respondents visited. It looks first at the overall size of group and then at the presence or otherwise of children within the groups.

### Total group size

Table 3 Total group size

Group size	% of all respondents (2005 figs in brackets)
1	8% (12%)
2	55% (53%)
3	9% (11%)
4	13% (13%)
5	1% (1%)
6 – 10	7% (4%)
11-20	3% (2%)
21 and over	1% (2%)
Don't know / no answer	3% (0%)
Total	100% (98%)

Note: Percentages are rounded to the nearest whole number so totals may not add up to 100%. Sample size = 105.

#### ► The majority of respondents visited in groups consisting of two people

- 55% fell into this category with the next most common group size being 4 people (13% of respondents).

#### ► Over 1 in 10 respondents came in larger groups

- 11% travelled to Brecon in a group of 6 or more people. Of these, 7% were in a group of 6 – 10 people, 3% in a group of 11 – 20 people and 1% in a group of 21 or more people.

## Presence and age profile of children

Table 4 Presence of children within groups visiting Brecon

	% of all respondents (2005 figs in brackets)
With children	25% (26%)
Without children	75% (74%)
Total	100% (100%)

Sample size=105

*Table 5 Age profile of children within groups visiting Brecon*

<b>Age profile of children</b>	<b>% of respondents with children</b>
0-5 year olds	62%
6-10 years	53%
11-15 years	38%

*Note: Percentages for the age profile of children totals more than 100%. This is because a respondent can have children in more than one age category. Sample size =26*

▶ **The vast majority of respondents to the survey were visiting in groups that did not include children**

- Three quarters (75%) fell into this category. This is an almost identical proportion to that found in the 2005 survey (74%).

▶ **Those with children were likely to have younger, rather than older children, with them**

- For instance, of the quarter of respondents that did have children with them, approaching two thirds (62%) had children aged between 0 – 5 years old, 53% had children aged 6 – 10 years old with them, whilst 38% had 11 – 15 year olds with them.

## **Accommodation & booking method**

Staying visitors were asked to provide details of the main type of accommodation used during their visit and also asked to say through what method they booked their accommodation.

*Table 6 Main accommodation used during visit (all staying visitors)*

<b>Type of accommodation</b>	<b>% all staying visitors (2005 figs in brackets)</b>
Guest House / B&B/ Farm	39% (36%)
Rented Self Catering / Serviced Apartment	13% (15%)
Touring / motorised caravan	13% (7%)
Camping	7% (14%)
Hotel / motel/ inn/ lodge	7% (12%)
Home of friends and relatives	7% (4%)
Bunkhouse	7% (2%)
Caravan – static, owned	4% (1%)
Caravan – static, rented	4% (1%)
Hostel	0% (2%)
Boat	0% (1%)
Don't know / NA	n/a (6%)
<b>Total</b>	<b>101% (101%)</b>

*Sample size = 46. Percentages are rounded to the nearest whole number so totals may not add up to 100%.*

► **Respondents were pretty evenly split between those staying in serviced and non- serviced accommodation**

- 46% were in serviced accommodation (39% in guest houses, B&Bs or farms with 7% in hotels, motel, inns or lodges). The two main forms of non-serviced accommodation were rented self catering/serviced apartments (13%) and touring / motorised caravan (13%).

*Table 7 Booking method for accommodation(all staying visitors)*

<b>Booking method</b>	<b>% all staying visitors (2005 figs in brackets)</b>
Directly with accommodation establishment	61% (64%)
Didn't book in advance	28% (17%)
Internet	4% (4%)
Through Travel Agency / Tour Operator	2% (3%)
Through Central Reservation services	2% (1%)
Tourist Information Centre	0% (1%)
Other	2% (3%)
Don't know / No answer	n/a (8%)
<b>Total</b>	<b>102% (101%)</b>

*Sample size = 46. Percentages are rounded to the nearest whole number so totals may not add up to 100%.*

► **Almost three quarters of respondents booked their accommodation in advance, with direct booking with the accommodation establishment the most popular method**

- 72% of staying visitor respondents booked in advance. Booking direct via accommodation providers accounted for the lion's share of advance bookings (61% of the sample used this method).
- Other booking methods were much less commonly used, with the internet the next most used method (4%).

► **Advance booking appears to have become less common amongst our respondents**

- In the 2005 survey, 17% of respondents didn't book in advance. In the 2008 survey, this figure rose to 28%.

► **The spread of advance booking methods has remained pretty constant since 2005**

- For instance, the proportion booking direct with accommodation providers varied little between the 2008 and 2005 surveys (61% in 2008 compared with 64% in 2005). Similarly, using the internet to book remained at the same level (4%).

## Reason for visit

Respondents were asked to indicate from a list which was the main reason for their visit. They were also asked to indicate all those reasons that influenced their visit. The table below provides the results.

*Table 8 Reasons for visit (all respondents)*

Reasons	All respondents (2005 figs in brackets)	
	Influenced*	Main reason**
Scenery/ landscape / countryside	32% (31%)	25% (23%)
Peace and quiet	23% (29%)	9% (5%)
Activities	16% (16%)	12% (15%)
Previous visit	15% (12%)	23% (13%)
Shopping	15% (10%)	18% (9%)
Easy to get to	10% (13%)	4% (1%)
Buying local produce	7% (5%)	0% (0%)
Historic interest	6% (13%)	4% (4%)
Recommendation	6% (7%)	6% (4%)
Visiting friends & relatives	5% (5%)	13% (7%)
Event / festival	4% (4%)	6% (6%)
Buying local arts and crafts	3% (4%)	0% (1%)
To visit a visitor attraction	2% (7%)	7% (1%)
Just passing through	0% (4%)	4% (7%)
To attend a sporting event	0% (0%)	1% (0%)
Other	0% (0%)	4% (2%)
Don't know / none	29% (28%)	5% (2%)

*Note: \*Percentages exceed 100% due to multiple answers. \*\* Percentages are rounded to the nearest whole number so totals may not add up to 100%.*

► **Brecon's scenery & landscape was both the single most important influence on visits and the most cited main reason for a visit**

- Scenery was an influence for just under one third of visitors (32%), whilst it was the main reason for a quarter (25%).

► **The influence on visits of knowledge gained from previous visits increased**

- Just under a quarter of respondents (23%) cited previous knowledge as the main reason for visit. This is almost double the proportion of respondents that cited this as the main reason for visit in the 2005 survey (13% in 2005).

► **Peace and quiet was a commonly cited influence but less of a main motivator of visits**

- Just under one quarter of respondents (25%) cited peace and quiet as an influence, compared with only 9% citing it as the main reason for a visit.

► **Some factors were more likely to be the main motivators of visits than an influence**

- This included previous visits (23% cited as main reason, compared with 15% citing it as an influence), shopping (18% main reason, 15% influence) and visiting friends and relatives (13% main reason, 5% influence).

## Origin of visitors

Table 9 *Origin of visitors*

Where are you from?	All respondents (2005 figs in brackets)
Wales	46% (31%)
London & SE England	14% (21%)
SW England	14% (12%)
West Midlands	8% (6%)
East of England	3% (4%)
East Midlands	3% (4%)
NW England	1% (3%)
Yorks and Humberside	2% (3%)
North East	0% (2%)
Overseas	0% (1%)
Scotland	0% (0%)
Ireland	0% (0%)
Don't know / no answer	9% (13%)
<b>Total</b>	<b>100% (100%)</b>

*Sample size = 105.*

► **The indigenous Welsh market remained the largest single source of visitors**

- Nearly half (46%) of all visitors to Brecon were from Wales. Figures from the 2005 survey suggest that this indigenous market has grown over the last 3 years (31% were from Wales in the 2005 survey).

► **The South of England was the second strongest market**

- Over one quarter of respondents hailed from the south of England. 14% were from London and the South East with a further 14% from the South West.

## Frequency of visit

Table 10 Frequency of visit

How often do visitors come?	All respondents (2005 figs in brackets)
This is my first visit	19% (34%)
Once a year, or less	29% (32%)
2-4 times a year	24% (18%)
More than 4 times a year	21% (8%)
Don't Know/ NA	6% (7%)
Total	99% (99%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

### ► The vast majority of respondents had previously visited Brecon

- Around three quarters (74%) of respondents had been to Brecon at least once before, with just under one fifth (19%) on a first time visit.

### ► Regular visitors made up almost half of respondents, a proportion that has risen considerably since the last survey

- Looking at those who said that had been to Brecon two or more times, we can see that 45% of respondents fell into this category in the 2008 survey. This is considerably higher than the 26% seen in the 2005 survey.

## Levels of knowledge

Table 11 Level of knowledge of Brecon prior to visit

Level of knowledge	All respondents (2005 figs in brackets)
Knew most things	29% (13%)
Quite a lot	35% (33%)
A little	20% (25%)
Not very much	13% (22%)
Nothing at all	3% (7%)
Don't know / no answer	0% (2%)
Total	100% (102%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

### ► Overall levels of knowledge of Brecon prior to visit were high

- Almost two thirds of respondents (64%) said that they knew most things / quite a lot about Brecon prior to this visit. The high proportion of repeat visitors included in the survey may have had a part to play here.
- Levels of knowledge were considerably higher than in the previous survey. For instance in the 2005 survey, 46% said that they knew most things / quite a lot.

► **Low levels of knowledge amongst respondents appears to have dropped**

- 16% of respondents in the 2008 survey said that they either knew nothing at all or not very much about Brecon. This is much less than the 29% who said this in the 2005 survey.

## Length of stay

Respondents were asked to say how long they intended to stay in Brecon on that particular day. The table below presents the results (It should be noted that the results include staying visitors and hence are likely to be higher than if just day visitor results were presented).

Table 12 Length of stay in Brecon

Length of stay (hrs)	All respondents (2005 figs in brackets)
Less than 2	6% (6%)
2 to 4	54% (49%)
5 to 7	16% (16%)
8 to 10	18% (2%)
11 to 14	0% (1%)
More than 14	12% (16%)
Don't know / NA	1% (10%)
Average (mean) number of hrs*	3.9 hrs (3.7 hrs)

Note: This figure excludes those staying more than 14 hours.

► **There was a good mix of long and short visits to Brecon amongst our sample but 6 in 10 visits lasted 4 hours or less (60%).**

- The average length of time spent in the destination was just under 4 hours (3.9 hours). This was slightly up on the 3.7 hours recorded as the average length of stay in the 2005 survey.

## Information sources

The questionnaire looked at the information sources consulted by visitors both prior to, and during, their visit.

## Prior to visit

Table 13 Information sources used by visitors prior to arrival

Information sources	All respondents (2005 figs in brackets)
None obtained	45% (6%)
Internet	26% (34%)
Brecon Tourist information centre	12% (12%)
Advice / Word of mouth	10% (15%)
Brecon Beacons National Park Visitor Guide	10% (8%)
Mid Wales and Brecon Beacons Brochure	7% (10%)
Guidebook	7% (17%)
Other holiday brochure	5% (8%)
Other Info outlet	5% (6%)
Articles in Newspaper / Magazines	3% (2%)
Adverts in Newspapers / Magazines	2% (1%)
Information at hotel /attraction	2% (1%)
Visit to holiday exhibition	0% (1%)
TV programme	0% (0%)
Other	2% (2%)
Don't know / No answer	10% (24%)

Note: Percentages exceed 100% due to multiple answers. Caution: when interpreting these results it should be borne in mind that the nature of the locations from which questionnaires were distributed may have skewed the results.

### ► The internet was the single most used source of information but almost half of visitors didn't use any source of advance information

- Just over a quarter of respondents (26%) said that they used the internet to gain information prior to their visit. However, 45% of respondents said that they didn't obtain any information in advance of their visit. This is much higher than the 6% who didn't obtain prior information in the 2005 survey. The higher proportion of repeat visitors to Brecon in the 2008 survey may help explain the difference.

### ► With the exception of the Brecon Beacons National Park Visitor guide, use of printed information prior to visit appears to have reduced over time

- The National Park Visitor guide was used by 1 in 10 respondents prior to visit (as compared with 8% in the 2005 survey). Aside from this, the Mid Wales and Brecon Beacon brochure, guidebook and other holiday brochure all recorded lower use in the 2008 survey than in 2005.

### ► TIC use has held steady

- In the 2008 survey 12% had used Brecon's Tourist Information Centre, the same proportion as had done in 2005. Use of other information outlets was 6% in 2008, with 5% in 2005.

## During visit

Turning to information sources used during a visit, the table below presents the main findings.

Table 14 Information sources used by visitors during visit

Information sources	All respondents (2005 figs in brackets)
None obtained	48% (5%)
Brecon Tourist information centre	24% (24%)
Mid Wales and Brecon Beacons Brochure	7% (4%)
Brecon Beacons National Park Visitor Guide	7% (8%)
Other holiday leaflet / brochure	6% (15%)
Information at hotel /attraction	6% (10%)
Guidebook	5% (6%)
Internet	5% (1%)
Other Info outlet	4% (8%)
Advice / Word of mouth	4% (7%)
Articles in Newspapers / Magazines	1% (1%)
Adverts in Newspapers / Magazines	1% (1%)
TV programme	0% (0%)
Visit to Holiday Exhibition	0% (0%)
Other	0% (2%)
Don't know / No answer	20% (41%)

Note: Percentages exceed 100% due to multiple answers.

### ► Nearly half of visitors didn't use any source of information during their visit

- As was the seen with information used prior to visit, a high proportion of visitors (48%) did not use any source of information during their visit.

### ► Information sources used during visits varied considerably from those used prior to arrival

- The internet, widely used beforehand, was hardly used (5%). Instead, Brecon's TIC tops the sources of information used during a visit with just under a quarter (24%) using it. However, when interpreting these results it should be borne in mind that the nature of the locations from which questionnaires were distributed may have skewed the results.

### ► Specific guides and brochures were used by around 1 in 14 visitors

- Both the Brecon Beacons National Park Visitors Guide and the Mid Wales and Brecon Beacons brochure were used by 7% of respondents. Usage of these specific guides was higher than the 5% who said that they had used a guidebook.

## Satisfaction

Respondents to the survey were asked to rate their overall satisfaction with their visit according to five categories, ranging from excellent to very poor.

Table 15 Overall quality of visit to Brecon

Overall rating	All respondents (2005 figs in brackets)
Excellent	46% (36%)
Good	48% (46%)
Average	6% (10%)
Poor	0% (1%)
Very poor	0% (1%)
Don't know / N.A	1% (5%)
Total	101% (99%)

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

► **Over 9 out of 10 visitors gave high satisfaction ratings for their visit**

- 94% of respondents rated their visit excellent or good. Encouragingly, there were no negative ratings.

► **Satisfaction with visits appears to have increased**

- As we have seen above, 94% of respondents in the 2008 survey rated their visit as excellent or good. This is higher than the 82% who gave these ratings in the 2005 survey. The proportion rating their visit as excellent increased by 10%, from 36% to 46%.

In addition to the overall rating, respondents were asked to rate 17 elements of the visitor experience in Brecon. The same five category rating system was used, ranging from excellent to very poor. The table below summarises the results and compares these ratings with the average ratings given for all three towns included in the 2008 research programme (Crickhowell, Talgarth, Brecon).

Table 16 Ratings of facilities, services and customer service(all respondents)

Rating of services	% excellent / good (2005 figs in brackets)	Up/ Down ?	Average for all 3 towns	Above or below average?
Scenery / countryside	98% (91%)	↑	94%	Above
Friendliness of local people	93% (74%)	↑	88%	Above
Feeling of welcome	93% (73%)	↑	87%	Above
General Atmosphere	92% (78%)	↑	86%	Above
Quality of accommodation	91% (55%)	↑	86%	Above
Range of visitor attractions / places to visit	90% (67%)	↑	66%	Above
Amount of info available about Brecon	87% (63%)	↑	74%	Above
Quality of information available about Brecon	85% (62%)	↑	72%	Above
Cleanliness of streets	83% (67%)	↑	80%	Above
Standard of signposting (pedestrian)	82% (57%)	↑	69%	Above
Standard of signposting (road)	82% (59%)	↑	72%	Above
Value for money	79% (70%)	↑	71%	Above
Range of eating places available	79% (51%)	↑	63%	Above
Availability of parking	74% (52%)	↑	62%	Above
Availability of public toilets	74% (46%)	↑	62%	Above
Cleanliness of public toilets	67% (41%)	↑	52%	Above
Range of shops	59% (44%)	↑	48%	Above

▶ **The scenery and countryside in and around Brecon received the highest ratings**

- Nearly all respondents (98%) rated Brecon's scenery as excellent or good, with 92% offering the same ratings regarding Brecon's general atmosphere.

▶ **The friendliness of Brecon was rated very highly**

- The town was seen as friendly, with good scores for both the friendliness of local people (93%) and the feeling of welcome (93%).

▶ **The range of shops and cleanliness of toilets received the lowest ratings**

- The range of shops were rated as excellent or good by just under 6 in 10 respondents (59%), making it the lowest of all 17 factors rated. The cleanliness of toilets received the next lowest rating (67% rating them excellent or good).
- Although lower than other factors, ratings for these factors have improved considerably since the last survey in 2005 (For instance, the percentage rating the range of shops as excellent or good has increased from 44% to 59%, whilst cleanliness of toilets has increased from 41% to 67%)

- ▶ **Respondents' ratings of their visits were more positive than previously**
  - Comparing the ratings given in the 2005 with those given in 2008, all factors received higher ratings than they did in the 2005 survey.
- ▶ **Brecon's performance compares very well when set against other towns included in the research**
  - Brecon was one of three towns included in research during 2008 (the others were Crickhowell and Talgarth). Comparing the ratings given for Brecon with those for the three towns as a whole, Brecon had above average ratings for all 17 factors.

## Visitors' expectations of Brecon

*Table 17 How did your visit to Brecon compare with expectations?*

	<b>All respondents</b> (2005 figs in brackets)
Much better than expected	18% (21%)
Bit better than expected	9% (21%)
As expected	70% (46%)
A bit disappointed	2% (3%)
Very disappointed	0% (4%)
Didn't know what to expect	1% (2%)
Don't know / NA	1% (3%)

*Percentages are rounded to the nearest whole number so totals may not add up to 100%.*

- ▶ **A visit to Brecon exceeded the expectations of a quarter of respondents whilst for almost all others it met expectations**
  - Just under 1 in 5 respondents (18%) rated their visit as much better than expected whilst just under 1 in 10 (9%) rated it as a bit better than expected. Most respondents (70%) rated their visit as expected. This high latter figure was perhaps attributable to the increased proportion of respondents who were repeat visitors to the Town and hence knew what to expect.

If a respondent indicated that their visit was better or worse than expected, they were additionally asked to say why this was so. The answers to this question are included in the first part of Appendix 2.

### Suggestions for improvements

Respondents were asked "If we could improve just one thing about Brecon, what should that be?" The answers people gave appear in the second half of Appendix 2.

### Willingness to recommend

Respondents were asked whether or not they would be willing to recommend a visit to Brecon. The table below provides the response.

Table 18 Would you recommend?

	All respondents (2005 figs in brackets)
Yes	93% (85%)
Possibly	4% (7%)
No	1% (3%)
No reply	2% (5%)

► **Over 9 out of 10 visitors would recommend a visit to Brecon**

93% fell into this category, 7% more than was the case in the 2005 survey. Only 1% of respondents said they would not recommend a visit.

## Visitor interests

Visitors were asked to indicate whether they had taken part, or intended to take part, in a number of leisure activities. The tables below present the results.

Table 19 Participation in leisure activities

	All respondents (2005 figs in brackets)
Go to pub/restaurant	68% (58%)
Shopping	62% (56%)
Sightseeing	51% (55%)
Visit Attractions	44% (45%)
Attend festival/ cultural/ agricultural event	19% (8%)
Going to the theatre/show/concert	5% (5%)
Going to the cinema	5% (4%)
Attend sporting event as a spectator	4% (1%)
None	1% (3%)
Other	0% (0%)
Don't know / NA	3% (6%)

► **As was the case in the 2005 survey, leisure activities undertaken by visitors fell into two main groups – those that were engaged in by large numbers of visitors and those that were more of a minority interest.**

- Amongst the first group, going to pubs / restaurants came out as the most popular leisure activity (68%) with shopping (62%), sightseeing (51%) and visiting attractions (44%) also frequently cited. Aside from these four most popular leisure activities, just under 1 in 5 visitors (19%) attended a festival/cultural/ agricultural event. The remaining leisure activities were undertaken by less than one in ten visitors overall.

► **The incidence of leisure activities undertaken has remained broadly similar between 2005 and 2008**

- The top four leisure activities all remained the same. However, some have seen large fluctuations. For instance, attendance at festivals/cultural and agricultural events increased from 8% in 2005 to reach 19% in the 2008 survey.

In addition to these general activities detailed above, respondents were also asked to indicate their involvement in a number of specific indoor and outdoor activities. Table 20 (below) provides the detail.

*Table 20 Participation in activities*

	<b>All respondents</b> (2005 figs in brackets)
Walking	50% (59%)
Riding and pony trekking	7% (8%)
Cycling	7% (8%)
Swimming	6% (5%)
Fishing	6% (3%)
Creative Arts	2% (4%)
Golf	2% (2%)
Water sports	1% (4%)
Motor Sports	1% (3%)
Climbing /Abseiling	0% (3%)
Tennis	0% (4%)
Gliding	0% (1%)
Bird watching	0% (1%)
Mountain boarding	0% (0%)
Other	6% (3%)
Don't know/ None/ NA	30% (31%)

► **Walking dominates the list of outdoor activities undertaken, with riding and cycling the next most popular activities**

- Half of respondents had done some walking (or planned to) during their visit. Horse riding and cycling were the next most popular activities but were much less common (7% of respondents having each on their itineraries).

► **Participation rates in individual activities have not changed much between 2005 and 2008**

- Although there have been some shifts in the precise percentages, there have been few significant changes in the results from the two surveys. Fishing was on the itinerary of 6% of respondents in the 2008 survey, compared with 3% in 2005. Watersports has declined from 4% participation in 2005 to 1% participation in 2008.

## **APPENDIX 1 – RESULTS FOR INDIVIDUAL TRIP TYPES**

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This appendix includes results for the four types of visitor surveyed. These are listed below, along with the sample size achieved for each type of visitor

- Short break holiday takers (sample size = 28)
- Long stay holiday takers (sample size = 32)
- Holiday day trippers - i.e. on a day trip whilst on holiday elsewhere (sample size = 6)
- Day trippers (sample size = 39)

The small samples sizes means that great caution should be exercised when interpreting the results for these individual groups.

### **Age**

*Table 21 Age profile of respondents*

Age	% respondents			
	Long stay	Short stay	Holiday day trip	Day trip
16-24	6%	0%	0%	10%
25-34	6%	29%	17%	5%
35-44	9%	18%	17%	15%
45-54	22%	25%	17%	5%
55-64	28%	21%	17%	31%
65+	28%	7%	33%	28%
No answer	0%	0%	0%	5%
Total	99%	100%	101%	99%

*Percentages are rounded to the nearest whole number so totals may not add up to 100%.*

## Transport used

Table 22 Main mode of transport used by respondents to reach Brecon

Transport mode	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Car/van	91%	93%	100%	90%
Regular bus/coach	3%	0%	0%	5%
Bus/coach excursion	0%	0%	0%	5%
Motorcycle	3%	0%	0%	0%
Bicycle	3%	0%	0%	0%
Walk	0%	0%	0%	0%
Train	0%	0%	0%	0%
Other	0%	0%	0%	0%
No answer	3%	7%	0%	0%
Total	103%	100%	100%	100%

## Group composition

Table 23 Number in visit group

Total number in group	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
1	9%	4%	0%	10%
2	41%	50%	67%	69%
3	6%	11%	0%	10%
4	19%	18%	17%	5%
5	0%	0%	0%	3%
6-10	12%	4%	17%	3%
11-20	9%	4%	0%	0%
21 and over	0%	4%	0%	0%
Don't know / no answer	3%	7%	0%	0%
Total	99%	102%	101%	100%

## Accommodation type

Table 24 Main accommodation used during visit

Type of accommodation	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Guest House / B&B/ Farm	33%	50%	25%	n/a
Rented Self Catering / Serviced Apartment	25%	0%	0%	n/a
Touring / motorised caravan	21%	6%	0%	n/a
Camping	0%	17%	0%	n/a
Hotel / motel/ inn/ lodge	0%	11%	25%	n/a
Home of friends and relatives	8%	0%	25%	n/a
Bunkhouse	8%	6%	0%	n/a
Caravan – static, owned	0%	11%	0%	n/a
Caravan – static, rented	4%	0%	25%	n/a
Hostel	0%	0%	0%	n/a
Boat	0%	0%	0%	n/a
<b>Total</b>	<b>99%</b>	<b>101%</b>	<b>100%</b>	<b>n/a</b>

Results exclude where no reply was given. Sample sizes: long stay= 24, short stay=18, holiday day trip = 4. Percentages are rounded to the nearest whole number so totals may not add up to 100%.

## Booking method

Booking method	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Directly with accommodation establishment	63%	58%	50%	n/a
Didn't book in advance	16%	37%	25%	n/a
Internet	4%	0%	25%	n/a
Through Travel Agency / Tour Operator	4%	0%	0%	n/a
Through Central Reservation services	4%	0%	0%	n/a
Tourist Information Centre	0%	5%	0%	n/a
Other	7%	0%	0%	n/a
<b>Total</b>	<b>102%</b>	<b>100%</b>	<b>100%</b>	<b>n/a</b>

Results exclude where no reply was given. Sample sizes: long stay= 32short stay=17 holiday day trip = 4. Percentages are rounded to the nearest whole number so totals may not add up to 100%.

## Reasons for visit

Table 25 Reasons for visit

Reasons	Influenced				Main reason			
	Long Stay	Short Stay	Holiday day trips	Day trips	Long Stay	Short Stay	Holiday day trips	Day trips
Scenery/ landscape / countryside	34%	39%	0%	31%	38%	18%	33%	18%
Peace and quiet	28%	25%	17%	18%	16%	7%	0%	5%
Activities	31%	18%	17%	3%	22%	14%	0%	0%
Previous visit	22%	11%	0%	15%	28%	25%	17%	18%
Historic interest	3%	11%	0%	5%	0%	4%	0%	6%
Easy to get to	9%	14%	0%	10%	6%	4%	0%	0%
Recommendation	16%	4%	0%	0%	0%	11%	17%	5%
Shopping	9%	21%	0%	15%	3%	4%	0%	44%
Event / festival	3%	4%	0%	6%	9%	8%	0%	3%
Visiting friends & relatives	13%	4%	0%	0%	0%	25%	33%	13%
Just passing through	0%	0%	0%	0%	3%	4%	17%	3%
Buying local arts and crafts	0%	0%	17%	5%	0%	0%	0%	0%
To visit a visitor attraction	0%	0%	17%	3%	0%	11%	0%	8%
Buying local produce	6%	0%	17%	10%	0%	0%	0%	0%
To attend a sporting event	0%	0%	0%	0%	3%	0%	0%	0%
Other	0%	0%	0%	0%	9%	0%	0%	11%
Don't know / none	29%	32%	50%	33%	3%	14%	0%	0%

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

## Origin of visitors

Table 26 Origin of visitors

Where are you from?	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Wales	9%	39%	14%	85%
London & SE England	28%	15%	14%	3%
SW England	31%	11%	0%	5%
West Midlands	6%	11%	14%	5%
East of England	6%	4%	0%	0%
East Midlands	6%	4%	14%	5%
NW England	0%	4%	0%	0%
Yorkshire & Humberside	6%	0%	0%	0%
North East	0%	0%	0%	0%
Overseas	0%	0%	0%	0%
Scotland	0%	0%	0%	0%
Ireland	0%	0%	0%	0%
Don't know / no answer	6%	14%	43%	0%
<b>Total</b>	<b>98%</b>	<b>102%</b>	<b>99%</b>	<b>98%</b>

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

## Frequency of visit

Table 27 Frequency of visit

No of visits	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
This is my first visit	26%	33%	17%	3%
Once a year, or less	44%	26%	83%	10%
2-4 times a year	13%	19%	0%	41%
More than 4 times a year	13%	15%	0%	36%
Don't Know/ NA	3%	7%	0%	10%
<b>Total</b>	<b>99%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

## Levels of knowledge

Table 28 Levels of knowledge

Levels of knowledge	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Knew most things	28%	25%	17%	33%
Quite a lot	19%	36%	33%	49%
A little	28%	14%	50%	13%
Not very much	22%	21%	0%	3%
Nothing at all	3%	4%	0%	3%
Don't know / no answer	0%	0%	0%	0%
Total	100%	100%	100%	100%

## Length of stay

Table 29 Length of stay

Length of stay (hrs)	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Less than 2	5%	17%	0%	0%
2 to 4	54%	26%	80%	68%
5 to 7	9%	17%	20%	24%
8 to 10	5%	13%	0%	8%
11 to 14	0%	0%	0%	0%
More than 14	23%	25%	0%	0%
Don't know / NA	5%	0%	0%	0%
Average (mean) number of hrs*	3.7 hrs	2.4 hrs	2.8 hrs	4.0 hrs

*Note: The percentages exclude those who gave no response. Average mean number of hours excludes those staying more than 14 hours.*

## Information sources

The questionnaire looked at the information sources consulted by visitors both prior to and during their visit.

Prior to visit

*Table 30 Information sources used by visitors prior to arrival*

Information sources	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Internet	44%	36%	33%	3%
Guidebook	3%	14%	17%	3%
Advice / Word of mouth	9%	14%	17%	5%
Brecon Tourist information centre	22%	11%	0%	8%
Mid Wales and Brecon Beacons Brochure	9%	7%	17%	3%
Other holiday brochure	19%	4%	0%	0%
Brecon Beacons National Park Visitor Guide	9%	18%	0%	5%
None obtained	25%	25%	67%	72%
Other Info outlet	6%	7%	17%	0%
Articles in Newspaper / Magazines	0%	11%	0%	0%
Adverts in Newspapers / Magazines	0%	7%	0%	0%
Information at hotel /attraction	3%	4%	0%	0%
Visit to holiday exhibition	0%	0%	0%	0%
TV programme	0%	0%	0%	0%
Other	0%	0%	0%	0%
Don't know / No answer	6%	18%	0%	4%

*Note: Percentages exceed 100% due to multiple answers. Caution: when interpreting these results it should be borne in mind that the nature of the locations from which questionnaires were distributed may have skewed the results.*

During visit

*Table 31 Information sources used by visitors whilst in Brecon*

Information sources	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Internet	13%	0%	0%	3%
Guidebook	6%	7%	17%	0%
Advice / Word of mouth	3%	7%	17%	0%
Brecon Tourist information centre	16%	4%	17%	0%
Mid Wales and Brecon Beacons Brochure	9%	11%	17%	0%
Other holiday brochure	13%	7%	0%	0%
Brecon Beacons National Park Visitor Guide	16%	4%	17%	0%
None obtained	22%	36%	67%	74%
Other Info outlet	3%	7%	17%	0%
Articles in Newspaper / Magazines	3%	0%	0%	0%
Adverts in Newspapers / Magazines	3%	0%	0%	0%
Information at hotel /attraction	9%	7%	17%	0%
Visit to holiday exhibition	0%	0%	0%	0%
TV programme	0%	0%	0%	0%
Other	0%	0%	0%	0%
Don't know / No answer	28%	32%	0%	8%

*Note: Percentages exceed 100% due to multiple answers. Caution: when interpreting these results it should be borne in mind that the nature of the locations from which questionnaires were distributed may have skewed the results.*

## Satisfaction

Table 32 Overall quality of visit to Brecon

Overall rating	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Excellent	59%	50%	17%	36%
Good	38%	43%	33%	62%
Average	3%	7%	50%	0%
Poor	0%	0%	0%	0%
Very poor	0%	0%	0%	0%
Don't know / N.A	0%	0%	0%	3%

Table 33 Ratings of facilities, services and customer service

Factor	% excellent/good			
	Long stay	Short stay	Holiday day trip	Day trip
Scenery / countryside	100%	100%	83%	97%
General atmosphere	97%	96%	50%	90%
Feeling of welcome	91%	93%	84%	95%
Friendliness of local people	90%	100%	83%	89%
Quality of accommodation	90%	100%	100%	n/a
Value for money	94%	82%	33%	70%
Range of visitor attractions / places to visit	91%	89%	50%	95%
Cleanliness of streets	87%	75%	66%	87%
Amount of info available about the area	87%	89%	84%	87%
Quality of information available about the area	84%	89%	67%	85%
Standard of signposting (road)	88%	78%	67%	83%
Availability of parking				
Standard of signposting (pedestrian)	81%	82%	67%	85%
Range of eating places available	75%	81%	50%	84%
Range of shops	60%	65%	33%	59%
Availability of public toilets	72%	61%	67%	85%
Cleanliness of public toilets	69%	53%	34%	80%

## Visitor expectations

Table 34 How did your visit to Brecon compare with expectations?

	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Much better than expected	25%	18%	0%	15%
Bit better than expected	16%	14%	0%	0%
As expected	53%	61%	100%	85%
A bit disappointed	6%	0%	0%	0%
Very disappointed	0%	0%	0%	0%
Didn't know what to expect	0%	0%	0%	0%
Don't know / NA	0%	4%	0%	0%

Percentages are rounded to the nearest whole number so totals may not add up to 100%.

## Visitor interests

Visitors were asked to indicate whether they had taken part, or intended to take part, in a number of leisure activities. The tables below present the results.

Table 35 Participation in leisure activities

	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Go to pub/restaurant	72%	64%	67%	67%
Shopping	53%	43%	83%	80%
Sightseeing	63%	57%	67%	36%
Visit Attractions	59%	46%	33%	28%
Attend festival/ cultural/ agricultural event	37%	15%	0%	11%
Going to the theatre/show/concert	6%	11%	0%	0%
Going to the cinema	16%	0%	0%	0%
Attend sporting event as a spectator	9%	4%	0%	0%
None	0%	0%	17%	0%
Other	0%	0%	0%	0%
Don't know / NA	3%	7%	0%	0%

Table 36 Participation in activities

	% of respondents			
	Long stay	Short stay	Holiday day trip	Day trip
Walking	69%	61%	50%	26%
Riding and pony trekking	19%	4%	0%	0%
Cycling	19%	4%	0%	0%
Swimming	13%	7%	0%	0%
Creative Arts	3%	4%	0%	0%
Tennis	16%	0%	0%	0%
Water sports	3%	0%	0%	0%
Climbing /Abseiling	0%	0%	0%	0%
Motor Sports	3%	0%	0%	0%
Fishing	13%	7%	0%	0%
Golf	6%	0%	0%	0%
Gliding	0%	0%	0%	0%
Bird watching	0%	0%	0%	0%
Mountain boarding	0%	0%	0%	0%
Other	6%	8%	0%	17%
Don't know/ None/ NA	15%	29%	50%	74%

Percentages add up to more than 100% due to multiple choices

## **APPENDIX 2 – RESPONDENTS’ COMMENTS**

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*Please note: these comments are taken verbatim from respondents’ questionnaires and so may include spelling and grammatical errors.*

**If your visit was better or worse than expected can you tell us the reasons?**

### **Positive comments**

- Scenery, picnic areas better than expected
- Everything
- I like it a lot its picturesque
- Weather good for the time of year and is a big factor in enjoyment of a walking trip. Weather whilst we were in Brecon was clear and dry, lovely autumnal conditions
- Do something about the public toilets let the whole town down, several visitors commented
- Excellent weather for the weekend, 27/28th September
- We visited Hay on Wey earlier today there are more local shops small scale
- Everything we wanted to do was in easy reach of Beacon and we had forgotten just how beautiful it is here, a truly lovely place
- Attended a rehearsal of Talgarth male voice choir, they were very welcoming and outstanding singers, highlight of our holiday, many thanks to the lady in Brecon Tourist information who put us into them
- There were far more things to do in Brecon than I expected
- More shops of interest as remembered, lovely clear roads and fabulous scenery
- Better, due to wonderful hospitality of Felin Glais run by David and Chris Arthur at Aberscir, fantastic hosts
- The scenery is more spectacular than we thought it would be
- Not really although the weather was a problem
- V friendly people, excellent Jazz festival
- Accommodation was excellent as well as the friendliness and helpfulness of the staff at Langors lake
- Beautiful area of the country
- Just do not change anything we love it
- A good mix of shops and traditional
- My only criticism being the viewing television room, whilst listening to

commentary I was distracted by noise of the public near the shop doorway at the entrance to the room

- Unfortunately we were very unlucky with the weather but no one can control that. We were lucky that the B&B we stayed in was very accommodating and did not seek to keep us out during the day
- We have had a fabulous stay in a local B&B that specializes in equine holidays. We have been provided with excellent facilities for our horses as well as ourselves and also been given detailed information as where we can ride with detailed routes of various lengths to suit our needs. This is a return visit due to the quality of our accommodation and the information we receive and the warmth and professionalism of our hosts.
- Tidier than I thought
- weather dreadful only reason for disappointment
- Welcome and help given
- Some great meals in pubs/restaurants with lots of local food, lovely towns with a variety of genuine local shops, Brecon particularly seemed to retain many old buildings and an attractive old town charm
- We wondered how a bunkhouse would suit our large family, in fact they all enjoyed it very much
- Brecon tourist info team very friendly and helpful, local people and shopkeepers also. Accommodation at Watergate Mill was best we have had(trying 5-6 past 2 weeks), Mill owner a great host

### **Negative comments**

- Not all streets have signs that you can see it is difficult to find your way, very poor café facilities-old fashioned and unappealing
- Public toilets were very poor and unclean
- Re Mountain Centre (Visitors Centre) very poor disabled parking
- Loved the area but town needs some TLC(ie shops closed down need good bright painted boards up to windows) many of the leaflets, brochures and guides found at many locations including Brecon National park Centres were out of date
- Drunken jobs
- There were not many attractions for young visitors especially during wet weather conditions

### **If we could improve just one thing about Brecon what should that be?**

- Don't Know
- Range of eating places
- None

- The toilets especially at the car park opp. Tourist information were disgusting, awash with water and dirty, loos not working
- Open attractions such as South Wales Borderers Museum on a Sunday (and the café at the Canal Basin)
- Parking 2hrs max in space when visiting in the afternoon and want to extend visit with dinner/meal you have to park somewhere else
- The weather
- keep it the way it was
- The public conveniences (toilets)
- More clothes shops
- If anything a real restaurant in Brecon for a special meal would be nice other than pub grub
- The road system very confusing
- Weather
- Better signs
- Clean the loos
- Loose the drunks never saw one police patrol during our stay, felt intimidated at night
- The weather
- Longer shop opening hours
- keep it as it is
- Wet weather activities indoor activity centre improvements because the weather is so unpredictable
- If only it was possible the weather, today changeable, unpredictable
- As I have come to Brecon to ride my horse the most important thing would be to ensure that all the bridleways are open, useable and well marked. Gateways in particular are important and not having to get off the horses
- Could you please ensure that we have 24hr weather with views uninterrupted by cloud
- Re Mountain Centre (Visitors Centre) very poor disabled parking, few spaces near toilets etc have to reverse out, should have circular road and more disabled spaces, also shops from café to other interests
- Brecon Visitor Centre restaurant - price of basic salad, reduce as charges at full dinner meal, seems expensive for two adults, didn't like till person who was the only unfriendly person on our entire visit
- I was disappointed by the amount of intensive modern farming (pastures and silage) and conifer plantations, I expected a national park to conserve its inhabitants as well as its landscapes
- More variety of small shops

- Take Bettel Square away and put it back to 20 years ago
- More parking spaces, it can get really full
- The weather
- The weather
- The parking meters are badly designed
- More local information at campsites
- We enjoyed the coloured marks of some walking paths (4 Palls trail) and think it would be very helpful in other areas for tourists as well
- More parking
- Make sunshine
- Nothing perfect
- The weather
- Visibility of road names and signs
- Parking is very poor, 2 hours stay for wedding guest is ridiculous, Hotel was very helpful though
- Bus service up to the Mountain Centre from Mentlly
- Better signposting
- Would like to see a bowling green (outside) in Brecon
- Perhaps tourist signposting
- Provide more disabled parking
- Footpaths overgrown or in a bad state of repair eg Cradoc to Brecon via Craig Hill
- Free admission to museum
- Toilet facilities
- Traffic flow at peak times
- More and clean public toilets please
- Loved it as it is- cant think of what we change if anything