

***“Where’s a good place to eat tonight?”***

**A Study of Visitor Questions in the  
Brecon Beacons and how to answer  
them**

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## Executive Summary

The aim of this study is to inform Brecon Beacons Tourism (BBT) as they seek to evolve their online services.

The report describes the questions which visitors to the Brecon Beacons ask both before and during their visit and evaluates how effectively these are answered by the current online services. The data was gathered via two online surveys, together with an analysis of 1000 TripAdvisor queries and Google Analytics data from the current website.

The question topics of most interest to visitors prior to a trip are: accommodation (25% of queries), places to visit, places to eat, public transport and things to do.

During a visit, the dominant topic is places to eat (25% of queries) followed by things to do and where to walk. With the exception of walks, *all* these topics are excellently covered by the current BBT website.

However, Google searches for places to eat or things to do only account for 1% of visits to the BBT site. The most dominant Google search topic (leading to 31% of hits on the BBT website) is 'events' – either the Brecon Jazz or Green Man Festivals. In contrast, events only account for 3% of visitor questions.

The study also showed that visitor questions exhibit 3 form factors. They tend to be **location specific** (e.g. 'nearest pub'), they **seek recommendations** (both to find the best *and* to reduce the number of options they need to consider) and they often **include qualifiers** (e.g. 'dog-friendly'). There is a clear mismatch between these form factors and the design of the current BBT website.

Based on the findings, the study sets out recommendations as to how BBT might evolve its online services to address the needs of visitors more effectively.

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# 1 Introduction

Brecon Beacons Tourism (BBT) is evolving its online services to provide visitors with better and more timely information about local accommodation, attractions, activities, services and products.

This research aimed to help that process in 3 ways:-

1. To identify the questions visitors actually have – both prior to and during their visit to the Brecon Beacons.
2. To assess how well current online services answer these questions.
3. To suggest how online services might evolve to provide better answers.

This report documents that research. It starts by describing how and where we collected data on visitor questions. It then describes these questions both for potential (i.e. pre-trip) visitors and those already here. It identifies the different information sources visitors currently use to find answers and evaluates the effectiveness of [www.breconbeaconstourism.co.uk](http://www.breconbeaconstourism.co.uk) in particular. Finally, it suggests ways in which BBT's online services might develop.

## 2 Data sources on visitor questions

It is difficult to collect a large amount of direct data on visitor questions – especially during the off season. Unfortunately, the visitors on the BBT database had already been surveyed recently so could not be re-surveyed for this project.

We therefore combined data from the following sources:

1. The TripAdvisor website forum for Wales
2. A small online survey of recent visitors
3. Focus groups and an online survey of BBT businesses
4. An analysis of the Google Analytics results from the BBT web-site

### 2.1 TripAdvisor Wales forum

TripAdvisor forums consist of questions posed by potential travellers to Wales and answers posted by other forum members.

The Wales forum<sup>2</sup> has 2,900 posted topics. We took the most recent 1000 of these and categorised each of the questions. We included general questions about visiting Wales as well as questions about visiting North and West Wales (to increase the size of the sample) but we excluded questions about Cardiff city.

The strength of the TripAdvisor data is the large sample size. It gives us a good feel of the topics of interest to people who are considering or planning a visit to Wales. We also see the direct phrasing of the question and the words used. The forum questions also reflect ones which people have found hard to answer simply by searching the Internet.

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<sup>2</sup> <http://www.tripadvisor.in/ShowForum-g186425-i307-Wales.html>

The weakness of the TripAdvisor data is that the questions are posed *prior to the visit*.

## 2.2 An online survey of recent visitors

We emailed an online survey to a small list of recent visitors who had agreed to take part in further research. This yielded a small sample of 35 responses. 28 had visited without children (mostly as couples) and most were aged over 35 years. Most stayed either in a hotel (13) or tent (11) and half stayed for less than 1 week. 22 of them were repeat visitors which obviously affects the questions they might have about the area.

The strength of this sample data source is that it is the most direct. The weakness is that the sample is small and not well balanced. Also the visitors were poor at recalling specific questions they had whilst on holiday several months previously. This is not surprising.

## 2.3 Focus groups and an online survey of BBT members

We conducted 4 focus groups at January's BBT meeting where we asked BBT members to recall the questions which they are asked by their visiting customers.

We then ran an online survey to collect the same data from a wider set of BBT members. 75 BBT members completed the survey. This is the breakdown of the kinds of businesses they ran<sup>3</sup>.

Accommodation provider	58
Visitor Attraction	6
Activity provider	15
Restaurant pub or cafe	10
Shop	9
Information provider	2
Transport provider	1

Overall, we collected 322 queries by these two methods.

In contrast to the TripAdvisor data, these were all questions asked by visitors whilst staying in the area.

This is a useful sized sample and its strength is that it probably reflects questions asked frequently by many different visitors. The weakness is that the sample reflects the proportional bias of the BBT businesses reporting, i.e. the majority of questions were provided by accommodation providers.

## 2.4 Google Analytics search words

Finally, we did some limited analysis on the Google Analytics data to identify the most common search terms which resulted in hits on the BBT website. This doesn't tell us what searches people actually did but only which ones resulted in them clicking on the BBT site from the Google listings. As we will see, this gives a different picture.

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<sup>3</sup> Some businesses appear in more than 1 category.

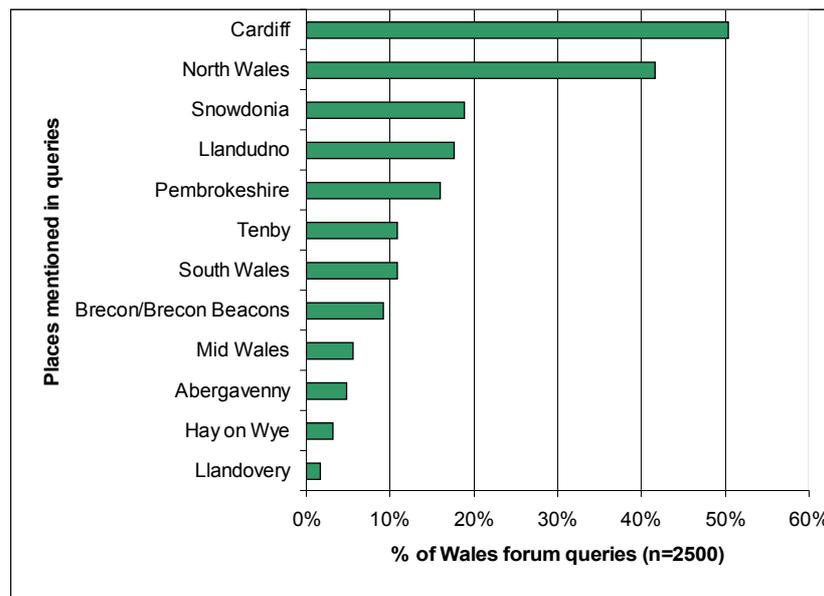
### 3 Visitor queries prior to the visit

First, we consider queries asked prior to the visit.

#### 3.1 TripAdvisor Queries

70% of the TripAdvisor Wales queries originated from UK residents<sup>4</sup> and 30% from abroad – most notably the US and Australia.

A word search on queries in the entire TripAdvisor Wales forum provides a simple measure of the relative level of interest in the Brecon Beacons (and associated towns) compared to other areas of Wales.



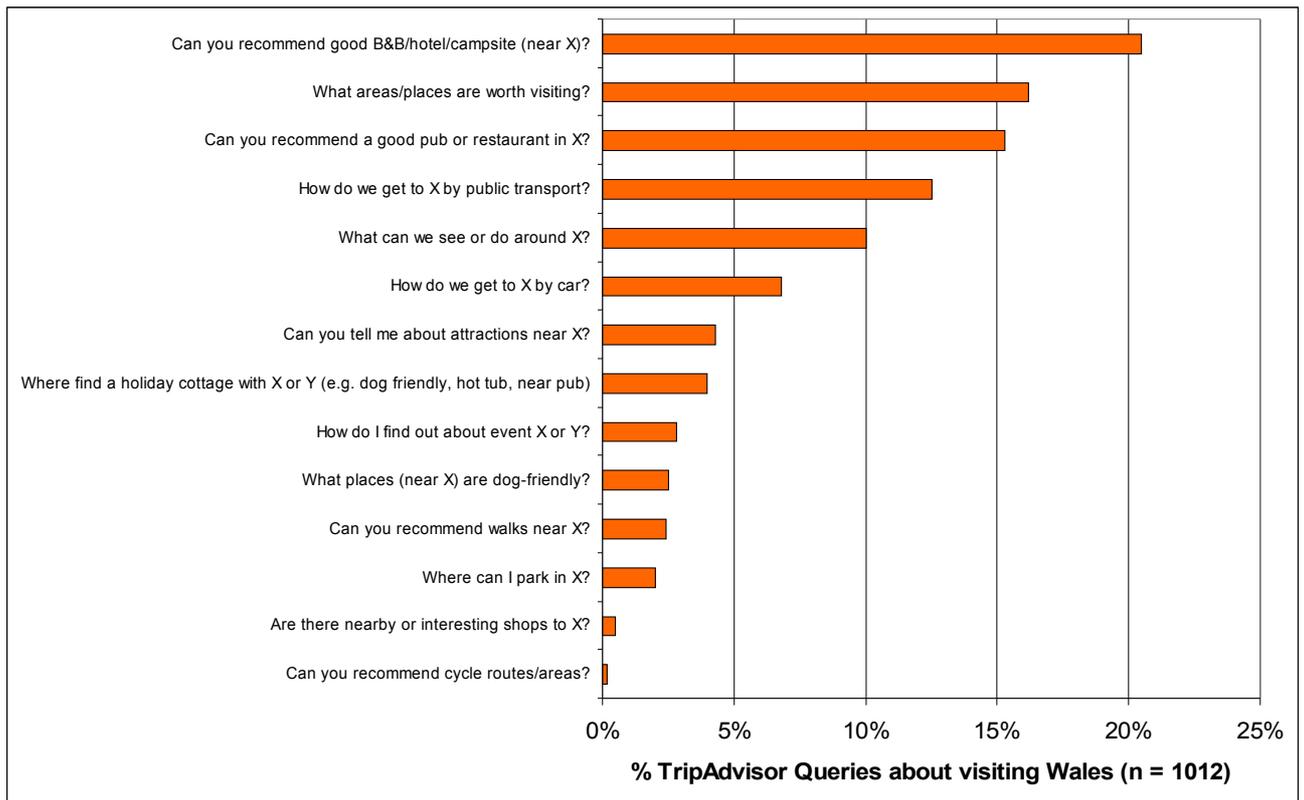
**Figure 1 : Places of interest in TripAdvisor questions**

We can expect that the region's new "destination" status will increase this level of public recognition.

Figure 2 shows our categorisation of 1012 queries from the Wales forum.

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<sup>4</sup> 14% from Wales



**Figure 2 : Categorisation of TripAdvisor Wales queries**

### 3.1.1 Most frequent topics

Figure 2 shows that the topics of most interest are: accommodation, places to visit, eateries, public transport and things to do. The top 2 are not surprising but we were slightly surprised that identifying places to eat was so important to people in the planning stage of a trip.

*"I'm looking for a restaurant that will serve something like a plain chicken breast or pork steak with French fries for my daughters but something a bit more "exotic" for myself and husband. I was hoping to avoid chain restaurants and go for some more local cuisine, but won't rule out Italian or anything else where we can all eat."*

*"We are aged 22 to 54 and are looking for the best place to eat in Brecon on a Saturday night during a hen weekend. We will have some vegetarians with us."*

*"Can anyone recommend an Indian restaurant? I am staying in the town centre next week so it needs to be within walking distance of there."*

Presumably, for many people, eating out is a critical part of a short break away or a longer holiday and they want to make sure that they are staying close to and know the whereabouts of good places to eat.

We were also surprised by the number of questions about public transport. In fact, a word search on the entire Wales forum showed that the words 'train' (750) and 'bus' (580) appeared nearly as often as the word 'car' (790) and more often than 'B&B' (500) or 'pub' (460).

*"I am planning to go there (Brecon Beacons) for a walk, but not sure where I should start. Any advice? I am going there from Bristol and taking train to Merthyr Tydfil, then taking*

*bus X43 to Storey Arms. Will it go to Pen Fawr and will Beacons be our destination, is there any better idea?? It is hard to find more information, please help"*

*"I'm planning a trip to Hay-on-Wye in a couple of weeks and would like to do some hiking as well. Does anyone know how to get from Hay-on-Wye to Capel-y-ffin chapel or Llanthony Priory by bus?"*

*"Hi I really want to see the beautiful countryside of Wales and am living in central London so my question is where would anyone recommend that I can go to via public transport? I know it will involve probably going to Cardiff then on again by bus - any ideas and help greatly appreciated!!"*

It seemed that this partly reflected the difficulty people experienced finding out about public transport options on the Internet.

*"How do we get from the Hotel (Cardiff) to Brecon Beacons? Everything on the internet sounds huge and complicated!"*

*"I have tried googling "scenic trains Wales" and haven't come up with anything".*

It certainly looks like the Brecon Beacons has untapped potential to cater for visitors who do not have or prefer not to use their own transport.

### 3.1.2 The form of the questions

The most striking aspect of the TripAdvisor data was, not so much the topics, but the **form** the questions take. Four factors cropped up repeatedly across questions on any topic.

#### 1. **Answers particular to a location:-**

*"We are now planning to go Bank Holiday weekend in May. Would like to stay close to Brecon to be able to eat out at night, but close enough to activities such as horse-riding."*

*"Have forgotten wife's birthday on 22nd June, does anyone know of a cottage in walking distance of Hay-on-Wye, or a nice hotel?"*

*"I'm going to Wales for the bank holiday weekend - staying in Hay-on-Wye on the Friday night .. and then two nights in Brecon. I'm looking for advice on what to do with the time I've got in Brecon "*

#### 2. **Recommendations (to guarantee a good experience)**

*"I am looking for a romantic bed and breakfast in the Brecon Beacons... any ideas on where is nice? Will be going early December. Would be nice to have log fire etc...."*

*"do you have a favourite place to stay in Hay-on-Wye? I have the tourist booklet brochure, but they all look GREAT."*

*"We are now debating between Llangoed hall and Gliffaes Country House Hotel in Crickhowell. any recommendations? Both seem well located for beautiful scenery and walks. We wanted greenery/water..."*

*"Can anyone help with any opinions on camping at Llangorse Lake in the Brecon Beacons? I have never been and am considering the Tan Troed site with Acorn Adventure. I will travelling with two teenagers and would be grateful for any advice."*

#### 3. **Recommendations (to reduce the search/decision space)**

"I'm looking to go away with my partner for a new years break. I've heard the Brecon Beacons is nice, but there's so many cottages when I search for them so I was wondering if anyone can advise of any places they have been in Wales!"

"I have to pick only one place to stay,so here's the question for those who know - if you had a weekend in Wales where would you stay?"

"help us to decide to stay in an area with some things to occupy us? We have no idea!"

"My partner and I are off to spend a chilly weekend in Abergavenny at the start of December and I was wondering if anyone could recommend a few nice places to go and visit whilst we are there"

#### 4. Key qualifiers in the question

"anybody knows of places to eat where we can bring our dog as the cottage states she can't be left alone on the premises. We prefer pub/bistro places rather than restaurants or hotels."

"Could anyone recommend a hotel in South Wales .. that has stunning views of the sea or a river/weir etc. A water-based theme for the view is what I'm after here! ... Preferably the hotel itself will be small-ish, relatively secluded and have a large double/four-poster room on offer."

"has anyone stayed in a nice cottage in Wales within walking distance to a nice pub and within driving distance to a nice spa hotel?"

"My girlfriend and I will be visiting Wales for the first time this November. Can anyone recommend an area that we can find a cheap weekend cottage, extreme sports (rafting or gorge walking/canyoning) and a picturesque location?"

### 3.2 Visitor survey questions

In the online survey for visitors, we asked whether they searched the Internet for information before they travelled and, if so, what they were trying to find out. 28 of the 35 respondents (80%) had done so. Figure 3 shows a categorisation of the topics they mentioned.

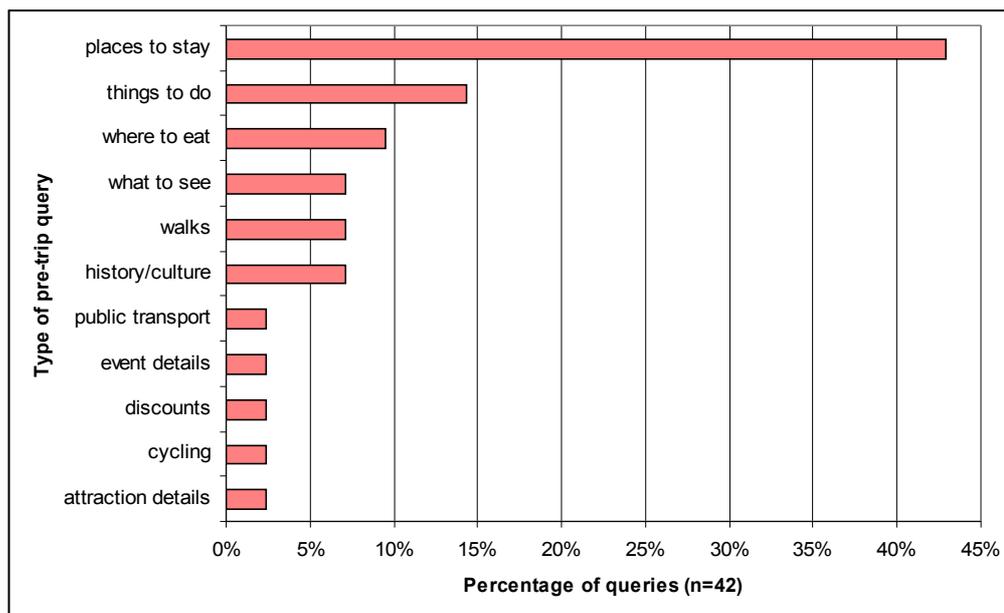


Figure 3 : Pre-trip queries from Visitor survey

These were dominated by finding places to stay.

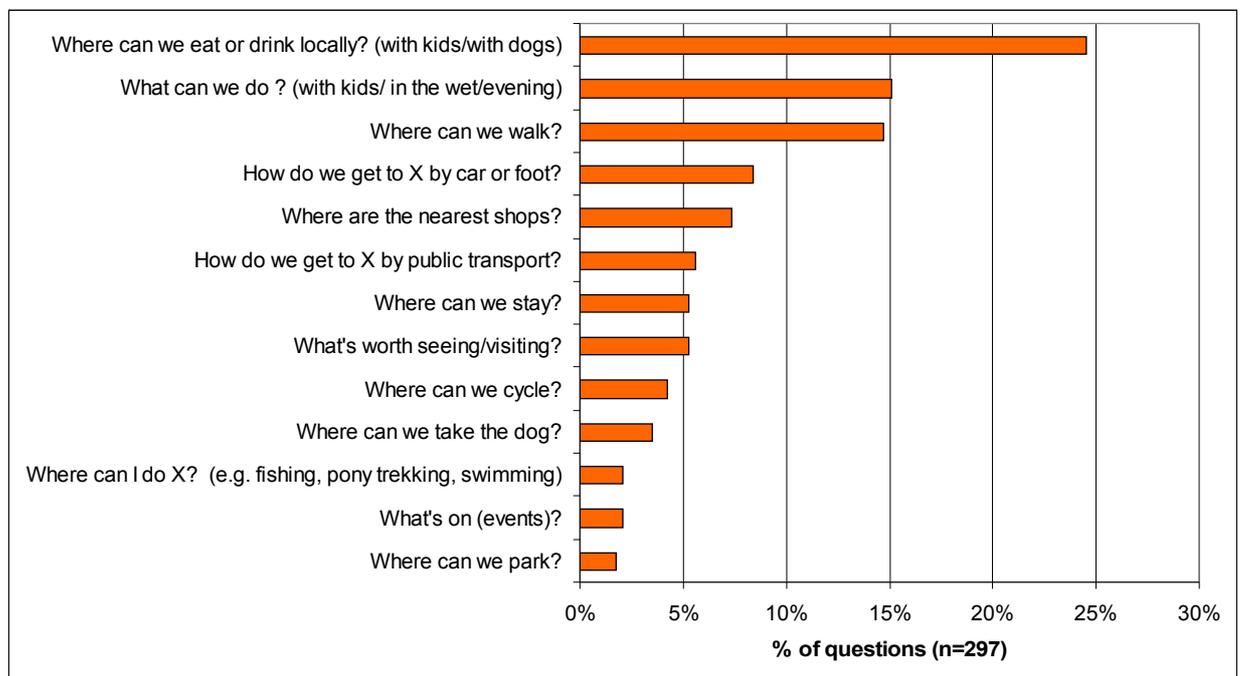
Unfortunately, few of the visitors recorded full queries on the survey. Most simply noted "accommodation options" or "campsites" so we know little about the form the enquiries actually took.

Although the sample is small, it is worth noting that finding out about things to do, most notably walks, was of interest to these people ahead of their visit.

## 4 Visitor queries during visit

As the visitor survey only recorded 12 queries made during a visit, we combined these with the queries recalled by the BBT members.

Figure 4 shows the main categories of visitor questions asked whilst on holiday here.



**Figure 4 : Visitor questions during visit**

Not surprisingly, accommodation questions are less significant to people who are already staying in the area. The striking finding is that questions about where to eat make up 25% of all questions asked. These take one of two forms:-

*"Can you recommend a good local restaurant?"*

*"Where is the nearest pub or restaurant?"*

The other two main categories are recommendations of what to do and, more specifically, where to walk.

*"What can we do here?"*

*"where are the best walks in the area?"*

## 4.1 Form of questions

The form of the visitor questions can be as important as the topic and the form showed very similar characteristics to the TripAdvisor queries.

### Location sensitive

55% of all questions asked by visitors were location sensitive, i.e. – visitors wanted to know places to eat or walk which were near to where they were staying.

*"Are there walks from the guest house?"*

*"Is there somewhere to eat within walking distance?"*

*"Where is the nearest shop?"*

A word search showed that the words "nearest", "nearby" and "local" were amongst the commonest used. It appears that this often meant within walking distance or only a couple of miles by car.

### Recommended

When asking where to eat (or walk), the visitors were most often looking for a recommendation based on local knowledge.

*"where is the best place to eat in town?"*

*"what are the best walks without using the car?"*

*"can you recommend a rainy day activity?"*

As with the TripAdvisor data, this is because visitors want to get the best experience they can but aren't looking to maximise the options – a choice of 1 or 2 is ideal and personal recommendations tend to provide this.

### Qualified

Again, many of the queries are qualified – apart from proximity, people want to know where they can take dogs or children or what to do in the evenings or wet weather.

*"where can we eat that takes dogs?"*

*"where is the best child friendly pub/cafe?"*

*"Can you recommend a nice campsite that allows dogs and children?"*

*"can you suggest an easy 1 hour walk?"*

*"what can we do in the rain?"*

*"what evening activities are there?"*

Dogs feature as often as children in the recorded questions!

### General

The vast majority of questions were general and open-ended but clearly seeking a short list of only 1 or 2 answers rather than an entire set of possibilities, e.g. "where is good to walk/visit/eat etc?"

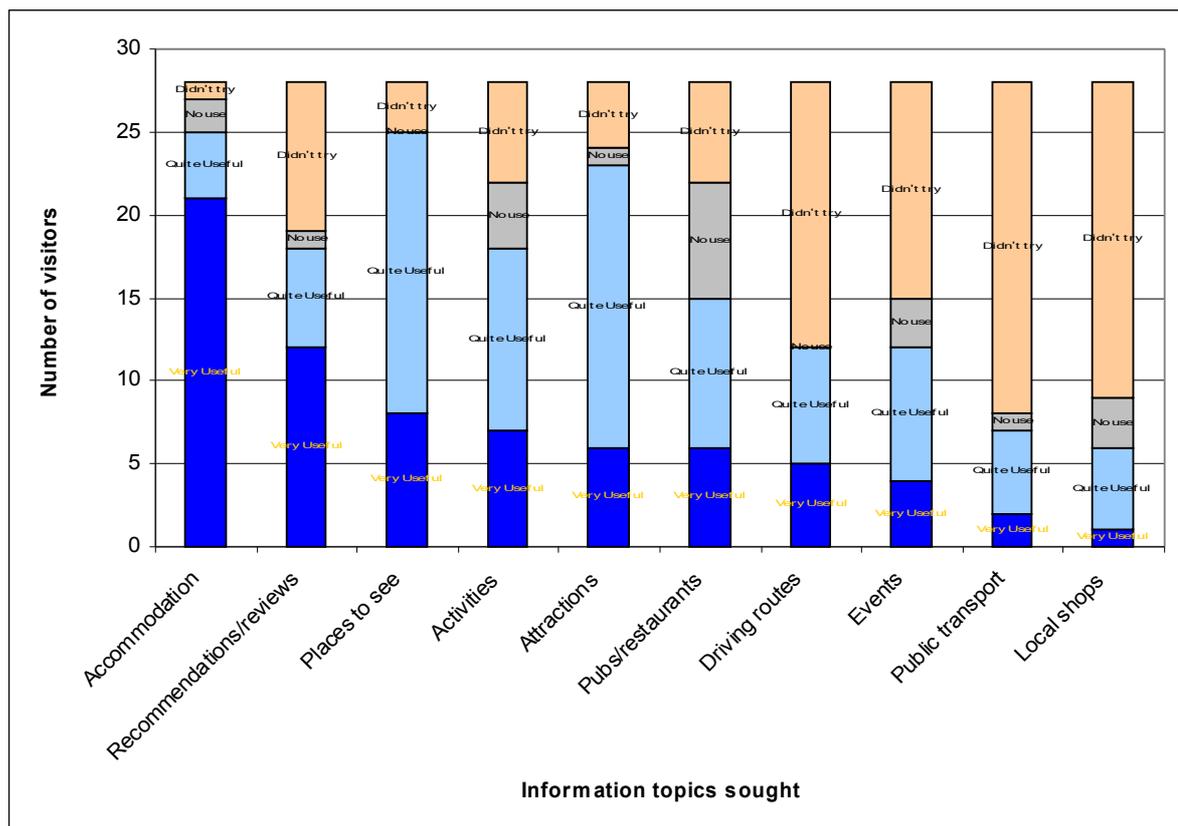
Only 13% of the queries reported were highly specific (i.e. where only 1 answer exists), e.g. "where is the walking route to Pen-y-Fan?" or "where can I hire a bike?". This might be because BBT members are most likely to recall the questions which are common across multiple visitors and therefore more general. But it makes sense that visitors are primarily looking for options – what to do, where to go, what to eat.

## 5 Use of information sources – pre visit

### 5.1 From a visitor perspective

28 of the 35 (80%) visitors surveyed consulted the Internet before their visit. All of those visiting for the first time did so.

The survey asked the visitors to rate how useful they found the Internet for different types of pre-visit information. Figure 5 shows the results.



**Figure 5 : How useful was the Internet for finding information (pre visit)**

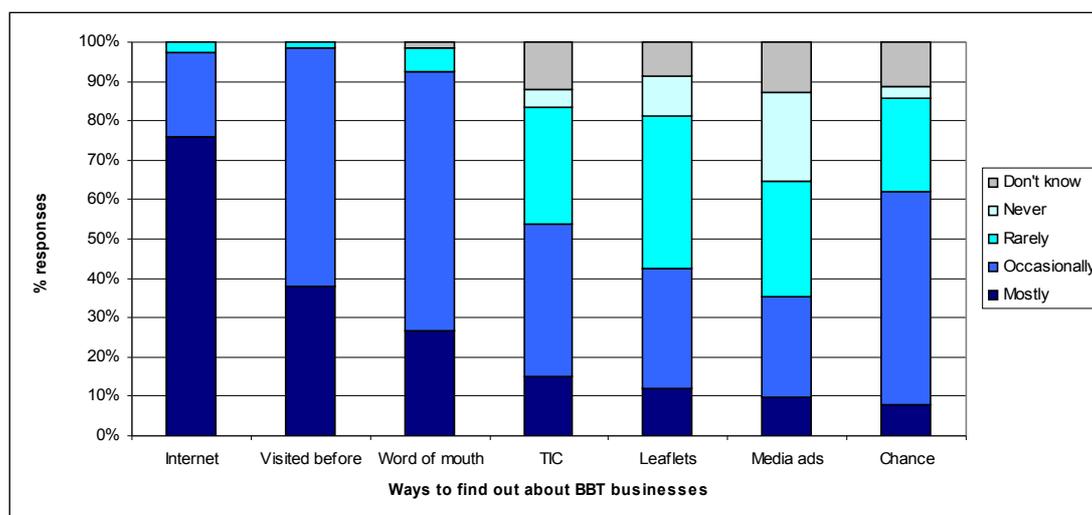
The Internet was considered useful for finding out about accommodation prior to the visit. The 2nd most useful was finding recommendations and reviews (although less people tried to find these). Beyond that, the utility appeared mixed and most either didn't try or found the Internet little use, e.g. for driving routes,

local events, public transport or local shops. The topic which received the most 'no use' votes was finding out about local pubs and restaurants.

The survey also asked visitors to list any websites they remember visiting. Not surprisingly, few were able to name specific websites. The BBT site got one mention along with VisitWales. Most listed Google, local community websites, holiday cottage or campsite websites and individual businesses through whom they eventually booked accommodation.

## 5.2 From a business perspective

In the BBT members' survey, we asked the businesses how their customers found out about them. Figure 6 shows their responses.



**Figure 6 : How customers find out about BBT businesses**

According to the BBT businesses, the Internet is by far the most frequent means for new customers to find out about them, but these data are dominated by accommodation providers. The Internet was still the most frequent method for the other businesses but 'word of mouth' was relatively more important for Activity Providers and Restaurants.

The survey also asked the BBT members what proportion of their customers knew about their business *before they arrived in the area*. 79% of accommodation providers said all or most of their customers knew about them. This makes sense as most would have pre-booked. However, and slightly surprisingly, 50% of the non-accommodation businesses said all or most of their customers knew about them before arriving in the area. This could be because many are repeat customers (see Figure 6) or that they *are* successfully researching and finding activities and restaurants to patronise ahead of their visits but this runs counter to our visitor query data. The more worrying explanation is that few new customers manage to find out about them whilst staying in the area.

## 6 Use of information sources – during visit

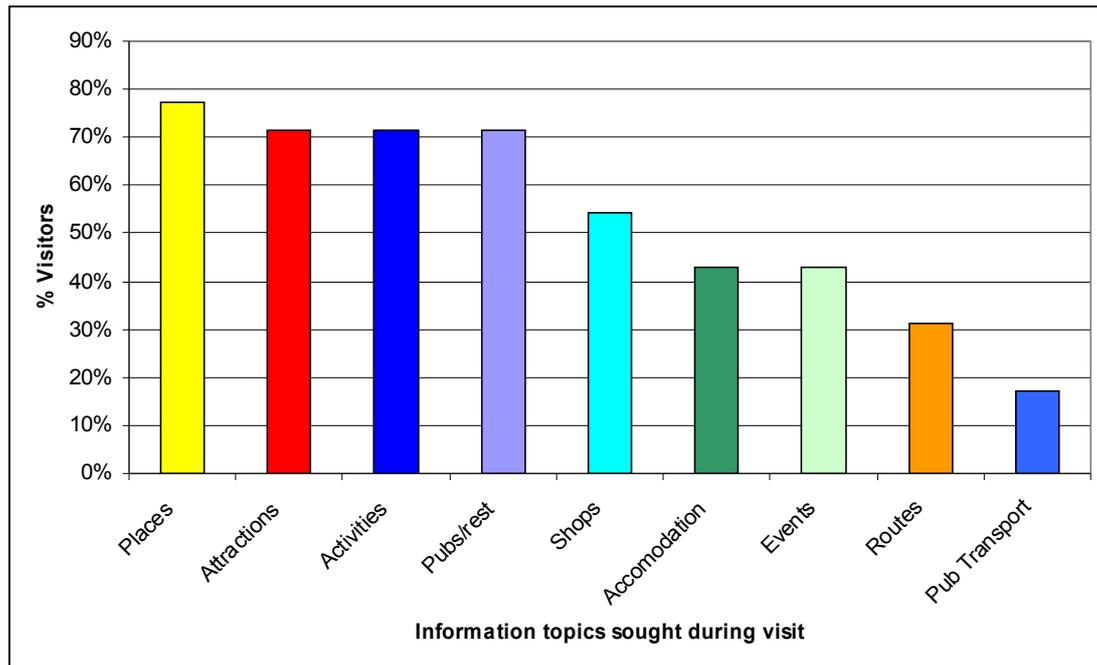
### 6.1 From a visitor perspective

Of the small sample of 35 visitors surveyed, 20 (57%) of them said they had accessed the Internet during their stay in Wales. Many of them had done this via

more than one means. The most common was via a mobile phone (70%) but 50% had done so via a PC or laptop and 20% via a public access point (kiosk or Internet café).

On the BBT members' survey, only 7% said none of their customers accessed the Internet whilst on holiday and 22% said that all or most of their customers did so.

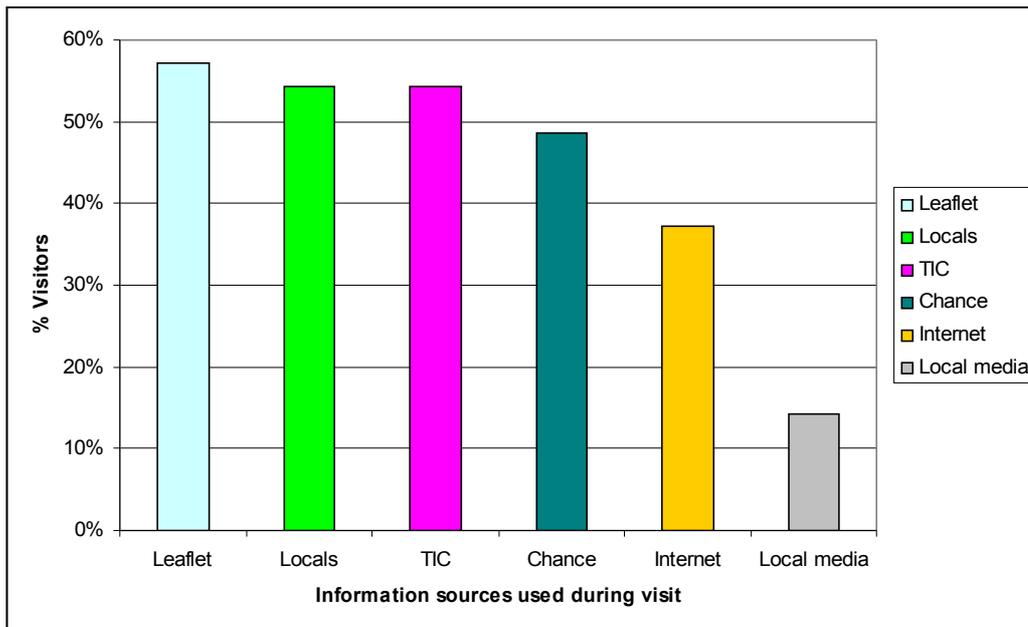
We tried to use the visitor survey to identify what information topics visitors sought whilst on holiday and the different means they employed to do so. First of all, Figure 7 shows the percentage of visitors who tried to access information on each topic during their stay.



**Figure 7 : Information topics sought during visit**

Places, attractions, activities and eateries were the topics on which most visitors said they sought information.

Figure 8 shows the percentage of visitors who used a particular information source to gain information on the above topics during their stay.



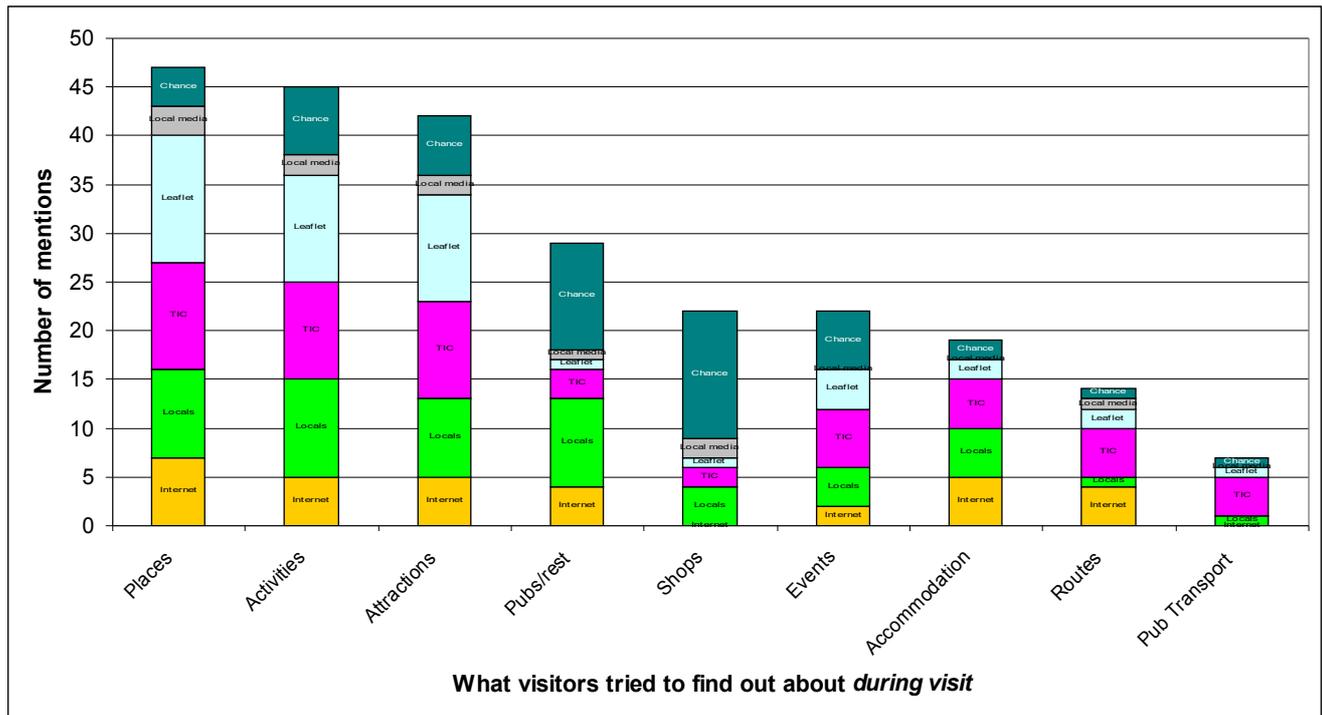
**Figure 8 : Information sources used by visitors during visit**

These results indicate no dominant information source. Even the most used information sources (leaflets, local people and TIC's) were only accessed by around half of the surveyed visitors.

We can combine the charts to explore which information is most likely to be sought by which means. In Figure 9, each vertical bar represents a topic which visitors attempted to find out about during their stay, and each coloured cross section on the bar represents a medium and shows how many visitors used that medium for that topic.<sup>5</sup>

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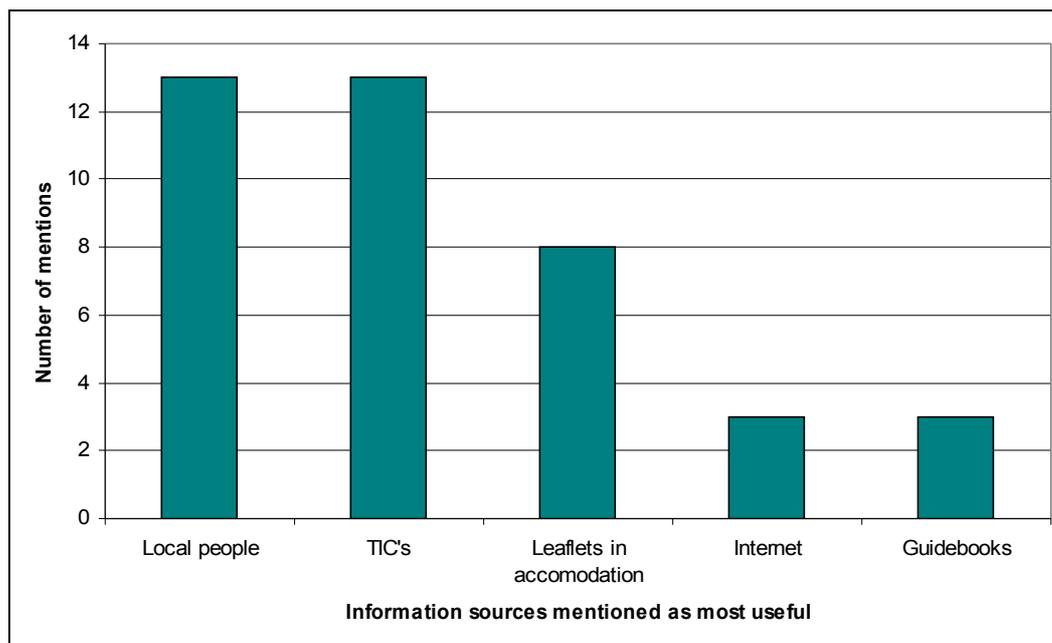
<sup>5</sup> The reason that the columns in Figure 9 are different heights from Figure 7 is because some topics (e.g. places) were explored using a wider range of sources than other topics (pubs/restaurants). In



**Figure 9 : What information did visitors seek and using which sources**

We know (from Figure 4) that the most frequent visitor enquiries are about pubs and restaurants. Figure 9 shows visitors are not using the more formal information sources (Internet, leaflets and TIC's) to answer these questions. Instead, they rely on talking to locals and chance encounter. In the case of shops, it's nearly all down to chance encounter.

We asked the visitors which they rated as the single most useful source of information whilst on holiday. Figure 10 shows their response.



**Figure 10 : Which information sources were most useful during visit**

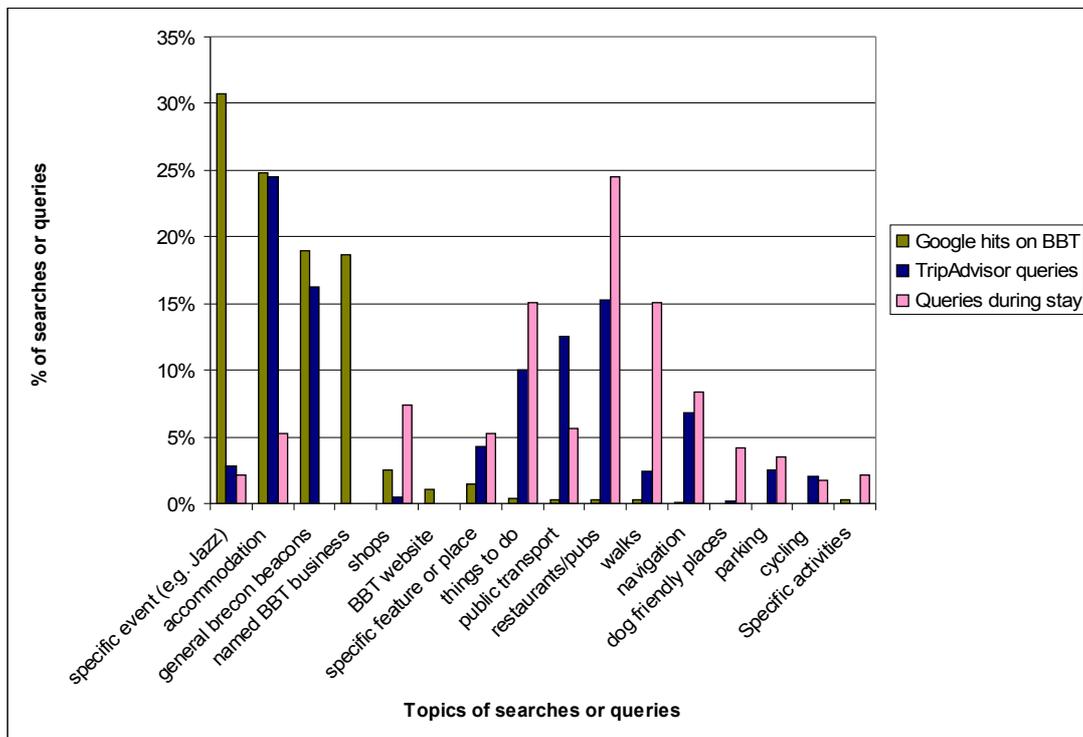
## 7 Effectiveness of BBT website<sup>6</sup>

### 7.1 Evidence from Google Analytics

The only direct data we have about the role of the BBT website in meeting visitors' information needs is from Google Analytics<sup>7</sup>. These only tell us the Google searches which led visitors to the site but we can at least see how well these match the main visitor questions.

We categorised the top 500 Google searches which led online users to the BBT site over the past year.

There is a markedly different pattern between the Google searches which resulted in BBT site hits<sup>8</sup> and the query topics recorded by our visitor research. Figure 11 illustrates this fact. The most striking finding is that the top search category, which accounted for 8896 (31%) of all visits, was **local events!** – most notably the Brecon Jazz Festival, the Green Man Festival and, to a lesser extent, the Abergavenny Food Festival. In contrast, events represent one of the least common queries both in the TripAdvisor data (3%) and the visitor queries recorded during a visit (2%).



**Figure 11 Comparison of Google searches resulting in BBT site hits with Visitor Query topics**

The BBT site is clearly doing an excellent job of attracting Google searches for the Brecon Jazz and Green Man Festivals. Unfortunately, the festival pages on the

<sup>6</sup> [www.breconbeaconstourism.co.uk](http://www.breconbeaconstourism.co.uk)

<sup>7</sup> We understand that a more thorough analysis of the Google Analytics statistics is currently in

<sup>8</sup> Of course, we do not know how many Google searches were made on each topic – only those which

BBT site have a high "bounce" rate which suggests that visitors were looking for the festival sites themselves and clicked through to these without exploring the BBT site further. It suggests that the festival websites may be failing to attract the search traffic they should.

Whereas the Google searches reaching the BBT site are about specific, known events, queries about events in the Visitor data tend to be open-ended. They are looking for any events happening whilst they are staying here.

More encouragingly, the BBT site is picking up accommodation searches and searches for general information about the area which we know are common visitor questions. But even here there are some striking differences.

- Most TripAdvisor and Visitor accommodation queries mention a particular town or village of interest. In contrast, 73% (7184) of Google searches for accommodation which resulted in BBT hits, were Brecon Beacons wide (i.e. unspecified), 21% named Brecon (town) and only 6% named any other place. This could be because entering the search term "*hotels in Brecon Beacons*" results in the BBT site featuring high on the Google results list but entering "*hotels near Brecon*" – or 'near' any other town in the area – doesn't list the BBT site on the first page of results at all. Typically, a business website will not automatically appear in a "near to X" search unless that text string occurs in its website content, but this is changing. Google now treats "near" as a reserved search term, and will use its geographical database to list accommodation, eateries or attractions close to the place mentioned high on the first results page.
- 45% of the Google accommodation searches picked up by BBT did not specify the type of accommodation they were looking for, e.g. hotel, B&B, cottage. The search term was general "*Brecon Beacons accommodation*". In TripAdvisor, the type of accommodation (hotel, B&B, campsite) is nearly always mentioned in the query. Also, UK Google trends shows that the word "hotel" is searched for 15 times more often than the word "accommodation". This suggests that more specific searches for B&B or hotels in this area are occurring but are picked up by other websites. That obviously does not matter if they are BBT business sites!
- The other notable difference is the tiny number of visitor queries about places to eat, things to do and walks that are picked up by the BBT site. These three topics account for 55% of visitor queries during a stay and 27% of queries ahead of a visit, but less than 1% of the Google searches (which resulted in visits to the BBT site) involved any one of them. There may have been far more searches of this type made, but hardly any of them reached the BBT site.

### 7.1.1 Access via mobile `phone

According to Google Analytics, 3247 (3%) of visits to the BBT site in the past year were made using a mobile `phone. Although it is out of season, this percentage has risen slightly (4%) since January 2011. 64% of mobile visits were a result of a Google search, 31% were referrals from another site and 5% were direct access.

## 7.2 Evaluation of BBT website against visitor query data

### 7.2.1 Topic coverage

Our research has shown that the main topics of interest to visitors prior to a visit are accommodation, places to visit, places to eat, public transport and things to do. During a visit the main topics are places to eat, things to do and where to walk.<sup>9</sup>

The current BBT website has excellent coverage of all these topics except for where to walk.

The main mismatches are in terms of the form which the visitor questions take.

### 7.2.2 Form of visitor queries

The research data clearly show that the form which the visitor questions take is as important as the topics. Both pre-visit and during-visit queries exhibited one or more of 3 form factors and taking these into account is critical in the design of an effective information providing source.

1. **Location specific** (only show me answers which are relevant to place X or Y or to where I am right now).
2. **Recommended** (tell me what is the best option and/or give me 1 or 2 choices only)
3. **Qualified** (only give me options which take into account certain criteria, e.g. dog friendly, child-friendly, easy walk, etc)

Let's take these factors one at a time....

#### 1. Location-specific

As already discussed, searches for hotels (or B&B's or campsites) "near Brecon" (or other places) do not readily find the BBT website. Aside from Google places, Google only lists the relevant business sites near X or Y if "near X or Y" appears as a text string in their website description. In their general search statistics, Google say 20% of all searches are related to a location, and paradoxically, the Brecon Beacons Tourism site isn't actually tied to a location as far as Google is aware.

The BBT site itself doesn't reflect the visitor's actual location or his location of current interest. The site has a Google cluster map but, because it appears on a separate page, it is difficult for users to get a quick sense of orientation or relative proximity *whilst* they are exploring accommodation, activity or attraction options on the site. The accommodation search function considers specification of location an advanced search feature and this does not seem to yield results for the smaller locations, e.g. Talybont-on-Usk.

This was a problem for the Internet kiosk in Brecon as well. When looking for somewhere to eat or shop whilst standing in Brecon High Street, users probably only want to see a few places within walking distance of where they are now. They probably don't want a catalogue of geographically distributed options. The 'during visit' queries (Figure 4) suggest that, in many cases, the 'nearby'

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<sup>9</sup> We believe the difference in interest in public transport pre-visit and during-visit simply reflects the

questions (with reference at least to eating and walking) are extremely sensitive to distance – often meaning walking distance only.

## 2. Recommended

As a trade association website, BBT has to treat and present its member businesses equally. It is effectively offering a catalogue of options and lists all relevant businesses (filtered in the case of accommodation by search criteria) in randomly varying order. This is the fairest way for the BBT members but it doesn't help a visitor anxious to find 'the best' or simply find a quick, low effort decision on what to do, where to stay or where to eat. Consumers, particularly on-line consumers, are now increasingly reliant on customer reviews and recommendations to guide their choice.

A visitor accessing the BBT site whilst on holiday (via a mobile 'phone or a public kiosk) is even more likely to want to make a quick decision rather than browse multiple options.

The problem may be exacerbated on sites like BBT's where all business pages adhere to a common format offering close to identical information about themselves, information that in many cases doesn't help the consumer decide. They lack the unique look and feel of individual websites and the text has to be studied closely to differentiate between them.

A critical problem for the BBT site is that it offers visitors more answers (on any topic) than they can comfortably process but no guide as to what other visitors would recommend as a good place to stay or eat or a good thing to do. Research studies show that customers are more likely to purchase when presented with a small array of similar products on offer than when presented with a large array<sup>10</sup>.

This is a common Internet problem and explains the heavy use of the TripAdvisor forums as visitors attempt (a) to find the best places and (b) to cut the option list down to a manageable size. Comments from the TripAdvisor site illustrate this search space problem.

*"I would like to spend a weekend in Wales ... After some research on the internet I am a bit overwhelmed and lost and in need of good advice to help to make my mind up. Most of the country looks absolutely gorgeous and I have to pick only one place to stay, so here's the question for those who know - if you had a weekend in Wales where would you stay?"*

*"I've heard the Brecon Beacons is nice, but there's so many cottages when I search for them so I was wondering if anyone can advise of any places they have been"*

*"I did try the official website - but everything on there sounds like a must do!"*

The risk is that, faced with more options than they want, people will simply give up looking.

## 3. Qualified

The current BBT website supports qualified searches for accommodation but not for other topics, e.g. activities. One can search for different types of activities (e.g. cycling, walking, etc) but not for, say, child-friendly attractions or easy walks. This is always a problem with systems that employ a pro-forma criteria list because you cannot predict all the qualifications which people will care about and every one added to the search form increases its complexity. Allowing text

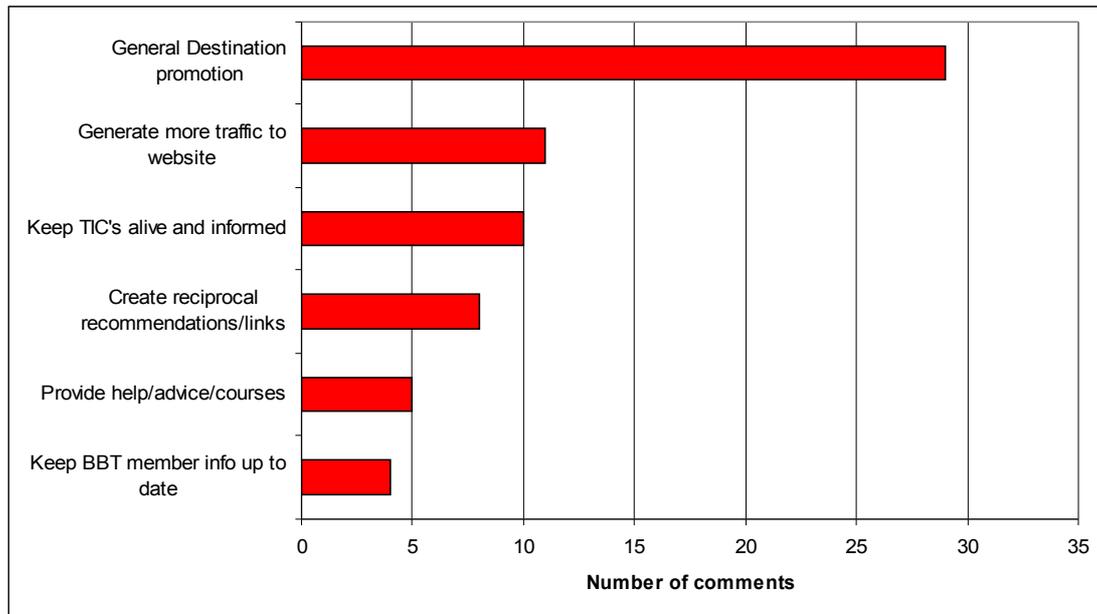
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<sup>10</sup> <http://prospectory.blogspot.com/2009/07/how-much-online-choice-is-good.html>

searches to pick out characteristics which a business has chosen to mention or tag (e.g. dog friendly, rainy day, etc) does not have this problem.

## 8 BBT members' recommendations on information provision

We asked the BBT members how they felt BBT could best help promote their business. Figure 12 shows a categorisation of their responses



**Figure 12 : How BBT could better help its members**

The majority of members said the most helpful thing the BBT could do was improve the visibility of the Brecon Beacons as a destination. They were comfortable this would result in growing the business for them.

*"Principally by generating greater interest in the area - actual bookings and increased business will flow from that."*

*"Promoting the BB promotes my business."*

They had some suggestions as to how to help this happen:-

*"Act as umbrella organisation at National Events like the Outdoors show, and also via national marketing campaigns for visitors both in & outside Wales."*

*"possibly by getting into more specialist and targeted marketing. ...we struggle to afford to get into major publications or targeted publications"*

*"Much more advertising of the Brecon Beacons National Park - beauty, more space as against Snowdonia/Lake District, ease of access e.g. journey time Midlands/south, SE, SW England. So many people are not aware of our beautiful Park - they all know about Snowdonia/Pembrokeshire"*

11 people wanted to see more traffic to the BBT website.

*"Improving website ranking of BBT website"*

*"A website which I am on which is top of the rankings helps me".*

10 people mentioned the importance of keeping the TIC's open and well-informed

*"By keeping the tourist information centres open"*

*"By NOT withdrawing Tourist Information Centres in any possible future cuts"*

8 people wanted better networking/cross links between different businesses.

*"If BBT could collate all the info from the different businesses that may interest holiday makers in a particular area e.g. all the local restaurants in Llangadog, Llanwrda, Llandovery area/or activities available and then make it easy for accommodation providers to access this info (in a printable format) to give to the holiday maker."*

*"Continued networking processes to let local people/business know what is on offer to help with customer/visitor experience."*

When asked how they could help promote their fellow BBT businesses, the majority stressed incorporating more web links on their sites.

*"by having comprehensive links on my website under relevant settings"*

*"Recommendation and/or links on our website (eg to pubs, restaurants, leisure activity operators etc)."*

But they stress that these need to be reciprocal:-

*"It disappoints me that some businesses are happy for you to have a link to their site but won't return the favour."*

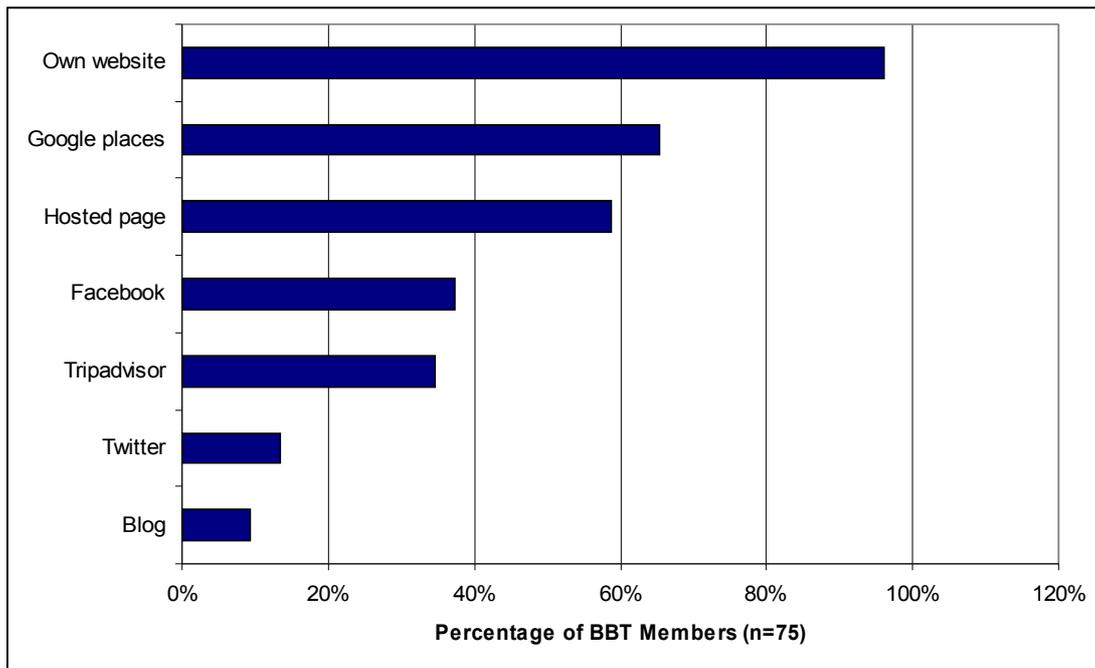
*"I have many links on my website ...some reciprocation would be helpful!"*

And they recognise that visitors only want a few recommended suggestions:-

*"I don't want to give my Customers 50 Choices for Accommodation and/or Food - I want to give them 3 really good ones"*

*"We have realised that recommendation by us usually results in guests following advice we offer"*

Figure 13 shows the percentage of BBT members who have different forms of online presence today.



**Figure 13 : Online presence of BBT members today**

We think there might have been some confusion here about whether their business has a registered Google places or TripAdvisor entry. Certainly, the percentage of registered BBT sites on either system is nowhere near this high.

Finally, we asked what percentage of accommodation providers enable wi-fi or other Internet access for their customers. 55% said that they do.

## 9 Recommendations

Based on our research findings and the evaluation of the current BBT website, we would make the following recommendations for BBT's evolving online service provision.

### 1. Clarify the role of the BBT website

The Internet world of search and information is evolving very quickly - social networks, end-user reviews, recommendation engines, Facebook<sup>11</sup>, Google places, Google hotpot, TripAdvisor together with the recent explosion in mobile apps. In particular, traditional objective searching based on content is evolving into a more subjective 'social search' where the 'likes' and 'recommendations' of other consumers, linked to the searcher through Facebook or Google, directly affect the order of the search results a user sees.

BBT needs to clarify what particular online value/role it can usefully offer to visitors and members in this increasingly interlinked, socially driven and mobile world.

There is little point in attempting to replicate or compete with global search and social network providers. The BBT site may just need to evolve in small ways that exploit the way consumers search for the kind of information it offers, as, of course, do the websites of individual members.

<sup>11</sup> And now Facebook places as well. <http://tinyurl.com/3agczu5>

## 2. Help BBT members exploit the existing services

We therefore endorse BBT's current policy of doing all it can to help members integrate with and exploit the power of the existing services, most notably Google Places, Facebook 'likes' and TripAdvisor.

BBT members will be understandably anxious about exposure to user reviews and ratings over which they have no control. But, for good or bad, these are here to stay and an individual business cannot prevent online reviews. What they can do is register and control the basic information about their business with Google, Facebook and TripAdvisor, and then monitor and engage with reviewers to improve their business and manage perceptions about it as best they can.

Despite the BBT survey results shown in Figure 13, a check on the TripAdvisor site shows that that less than 3% of the BBNP businesses which have TripAdvisor reviews online today have registered their business with TripAdvisor<sup>12</sup>. Some of these unregistered businesses already have over 50 user reviews!

The same is true with Google Places. Businesses can be listed on Google places search results and on Google maps regardless of whether they have registered themselves as owners and Google are pulling in user reviews of these places as well as starting to generate their own set.

In particular, many visitors will conduct searches using Google Maps, as distinct from general Google content searches. In Google Maps, search results are presented and displayed relative to the current map position. If you tell Google where you are (it will know that if you access it from a mobile phone), then the map will be centred on that location. Search terms like, say, "B&B" will now show Bed and Breakfast places registered with Google Places on the map, and list their sites for further detailed access. It's important that BBT members make sure their business are registered with Google Places, accurately located on the Google Map, with appropriate tags and text content to be picked up by obvious generic queries.

In order to benefit from the evolution of social search, we also recommend that BBT businesses add a Facebook 'like' button to their own web pages. When a Facebook user clicks a 'like' button then two things happen:

1. The fact that the user likes this page will be displayed on Facebook for the rest of *their* social group to see.



2. The "like" counter on the business website increments, so future users will see how many people like it and whether any of *their* social group do (the factor that will influence them the most).

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<sup>12</sup> Unfortunately, in the case of self catering businesses, this can be because TripAdvisor charge for



BBT will hopefully be able to continue to offer assistance to member businesses attempting to register their businesses with the dominant online services and offer good practice tips for managing their online presence and reviews.

### **3. Integrate location information throughout the site**

Google has the most complete location and mapping system and users are becoming dependent on this facility combined with knowledge of where they are right now via their mobile `phone. Individuals, businesses and umbrella organisations like BBT can already construct their own private Google Maps, and annotate these with suitably tagged places of interest, and with public Google Place markers from the global Google Map. BBT already has a private Google Map, accessible through the "location map" tab on its main site. This provides an excellent start point.

It would be helpful for the BBT site to put a (Google) map of each business on a business's sub-page. This would orient the business in question but also show consumers other Google places close by, indirectly answering questions such as "where is the nearest pub to where I'm staying?" or "where's the nearest B&B to this activity I'm thinking about booking?" as well as introducing them to new ideas of other possibilities in the same vicinity.

### **4. Focus BBT on destination**

Members would like BBT to focus on improving the promotion of the region as a destination, as well as promoting their individual businesses. The TripAdvisor forum data (Figure 1) certainly suggests there is value in doing this.

Ideally, there would be a way to elicit and encourage online user reviews of the Brecon Beacons *itself* as a 'place' to visit. Such reviews would both convey what was good (or not so good) about holidaying in this whole area but also provide other visitors with ideas of places to stay and things to do which other visitors have enjoyed.

We noticed that visitors will often write such helpful pointers in holiday cottage guest books –sharing their recommendations with the next visitors to arrive. Here are some examples copied from two such Guest books:-

*"The little high street of Crickhowell is also amazing, especially the bakery.. Cashells the butchers and the bakers sell great food. "*

*"It was great to hire a bike for the day, and we bought a map for a 6 or 20 mile cycle ride from the shop. I'm not the fittest person in the world and there was one part of the 20 mile journey that was very difficult (20% incline hill to go up) but once at the top totally worth the hard work, the view is stunning, and it takes you through the national park too (with hardly any peddling on the way back until you get to the canal again)."*

*"Plenty to do and see in and around Brecon and we spent a great three hours on Brecon canal in a rented boat [£45 quid for 3 hours]."*

*"The grandchildren enjoyed pony trekking, canoeing at Hay on Wye, the Dan-yr-Ogof caves and indoor climbing at Llangorse."*

Even if such comments need to be copied from a paper source, it would be good to see such anecdotal advice and feedback included on a destination site with clickable links added for every mention of a BBT business.

## **5. Cross-referencing and cross reviews**

Members also asked that BBT do what it can to add cross links between different kinds of business. For example, if the user is looking at the Green Man festival page of the BBT website, the right hand column currently lists other events they might be interested in. If he is looking at the page of a pub or restaurant, the column lists other pubs or restaurants. Perhaps instead, the site could cross-display accommodation options within a couple of miles of an event, or events and attractions that are easily accessible from the pub. Similarly, the page of an activity provider could display places to stay or eat in the close vicinity. An accommodation business could display nearby places to eat or walk and so on.

The comments left by visitors in guest books naturally make these cross links pertinent to that particular location.

*"Found two super eating places – Roberto's in Brecon and The White Swan in Llanfrynach."*

*"The kids really enjoyed a session at the climbing centre near Llangorse".*

*"Would highly recommend a day canoeing along the canal! Even though the weather was poor ... didn't spoil the weekend at all!"*

*"Tal-y-Bont has a good village shop"*

*"We recommend Blaenavon ironworks if you like industrial archaeology."*

Cross activity recommendations from previous visitors are incredibly useful to other visitors partly because they are tied to a location. Even TripAdvisor, which encourages more comprehensive user reviews, does not enable cross-references of this sort i.e. you can only review the business in question, not review other related businesses.

BBT businesses could be encouraged to collect and publish such cross recommendations from their customers on their own websites.

We are already seeing the beginning of future mobile "apps" which exploit people's desire to rate and share experiences to build quite sophisticated recommendation engines. In the future, we might see recommendations such as: *"people who hired bikes at Drovers Holidays enjoyed eating at The Old Black Lion or enjoyed canoeing at Wye Valley canoes"*. The challenge will be logging people's offline activities and offline purchases (e.g. an activity or a pub meal) and eliciting a rating of the experience from them. The good news is that many people seem motivated to provide such feedback to share with others.<sup>13</sup>

BBT should certainly track the development of Facebook places which is already getting its users to log their visits to UK attractions via their mobile 'phones.<sup>14</sup> In

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<sup>13</sup> The Gorilla in this market might turn out to be Visa. A simple 3 button rating at the end of each Visa credit card transaction – 'good', 'average' or 'poor' – would allow customers to rate their experience in the moment, with no effort and independently of the proprietor.

the Facebook world, it's possible that "Brecon Beacons" could even be logged as a 'place' to visit and 'like'.<sup>15</sup>

Whilst BBT themselves obviously cannot recommend one of their members over another, visitors can (and will!). The members must decide whether they want BBT to help customers find such recommendations or not, but they are inevitably going to arise, and will inevitably be consulted and factored into visitor choice. The risk is that sites which don't adopt or show them will increasingly be ignored.

## **6. Concentrate on mobile access and experience rather than kiosks**

Internet access via a laptop and wi-fi or by mobile phone is growing rapidly amongst UK holiday makers. Some Welsh cottage agencies<sup>16</sup> are now advertising that all their cottages are wi-fi enabled and BT Openzone claim that wi-fi usage on caravan and camping sites is up by 350% in 2010.

40% of our surveyed visitors said they had accessed the Internet via their mobile phones whilst on holiday here. The number of smart phone subscribers increased by 70% in 2010. Some sources claim that 24% of all UK users now have a smart phone.

Given these statistics, coupled with the explosion of mobile apps (which include mobile versions of Google Maps/Places, Facebook/Facebook Places, and TripAdvisor), we would recommend that BBT and its members focus their energy and backing into enabling and enhancing wi-fi and mobile phone access and services across the region. Our view is that this would be a more apposite use of resources than providing public Internet displays or kiosks which are expensive to produce, limited to a single location and in danger of becoming obsolete as an increasing percentage of the visiting population carry their own Internet access and screen in their pockets.

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<sup>14</sup> [http://www.facebook.com/LoveUK?sk=app\\_157474947622805](http://www.facebook.com/LoveUK?sk=app_157474947622805)

<sup>15</sup> Although, it's not clear what it might mean to visit a place (e.g. a pub) within a place (the Brecon Beacons)!

<sup>16</sup> E.g. [www.welshholidaycottages.com](http://www.welshholidaycottages.com)