

**A STRATEGY AND ACTION PLAN
FOR SUSTAINABLE TOURISM
IN THE BRECON BEACONS
2012-2016**

FINAL DRAFT



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1 INTRODUCTION

The Brecon Beacons National Park Authority, working with its partners through the Sustainable Tourism Partnership, has a substantial track record in the field of sustainable tourism. One of 75 'Charter Parks' across Europe, the Brecon Beacons has held the European Charter for Sustainable Tourism in Protected Areas since 2007. In 2009, the Brecon Beacons was formally recognised by Visit Wales as a destination, endorsing the working partnership which had been developed between the National Park Authority and Brecon Beacons Tourism, representing the private sector.

This new strategy for destination management over the next 5 years will succeed the existing strategy which was approved in 2007. Its development forms a major part of preparation for renewing the award of the European Charter for Sustainable Tourism in Protected Areas. It has therefore been developed in accordance with the requirements of EUROPARC in close collaboration with the Brecon Beacons Sustainable Tourism Partnership and other stakeholders. Sustainability will be fully integrated into the strategy.

The Brecon Beacons National Park is an IUCN Category V Protected Area, a living and working landscape whose management is guided by a set of principles developed at an international level. Where it can be shown to be sustainable, tourism is one of a number of economic activities which may be acceptable within a Category V protected area. Well managed tourism can make a strong contribution to all three pillars of sustainable development, and to the purposes and duty of the National Park Authority. Conversely, there is wide recognition of the importance of all aspects of the work of the National Park Authority to achieving a successful and sustainable tourism destination.

Funding for the development of this strategy has been provided by COLLABOR8 (an Interreg IVB North West Europe project co-financed by ERDF) and it will be important to incorporate the experience and structures arising from the COLLABOR8 project.

The strategy is focused on the Brecon Beacons National Park itself, but its area of influence extends into the countryside and settlements immediately surrounding the Park as defined by postcodes on the map in Appendix Two.

Building on the last five years

The previous Sustainable Tourism Strategy and its associated Action Plan was adopted by the Brecon Beacons Sustainable Tourism Partnership and the Brecon Beacons National Park Authority in 2007. This new strategy builds on that foundation, revisiting the priorities and renewing the action plan in the light of the challenges and opportunities that can be foreseen looking forward to the next five years.

Much progress in relation to sustainable tourism has been achieved in the Brecon Beacons since 2007. In particular, we can point to:

- The evolution of the Brecon Beacons Strategic Tourism Partnership into a Sustainable Tourism Partnership, strengthening opportunities for partnership working and development and co-ordination of work programmes.

- The emergence of Brecon Beacons Tourism as a fully established and highly regarded trade body representing over 200 private sector members.
- Formal recognition by Visit Wales of the Brecon Beacons as a destination, with associated funding for a programme of destination management, including a partnership based marketing programme.
- Using COLLABOR8 (an INTERREG IVB North West Europe programme) as a tool for destination development. From 2008, COLLABOR8 has supported 15 clusters of businesses involved in the development of tourism in the Brecon Beacons, based on sustainability, sense of place/cultural identity and quality.
- Establishing a 3-year Visitor Transport Initiative and a dedicated website for travel to and around the National Park
- Establishing a Brecon Beacons Marketing Co-ordination Group and preparing a 3-year marketing strategy.
- Maintaining support for tourism businesses through regular communication, training opportunities and an annual 'Tourism in Action' conference.

The recent success of a bid for EU INTERREG IVB NWE funding will lead to the establishment of the Rural Alliances project which, from Sept 2011 to July 2015, will establish and support structures and mechanisms to integrate community and economic interests at a local level in the Brecon Beacons, using tourism as the key focus.

A framework and guideline for all

The Brecon Beacons National Park Authority works in close partnership with public and private bodies to help industries such as tourism develop in a sustainable way that protects and enhances the special qualities for which the National Park is designated. The need for a partnership approach to tourism is more important now than ever before. The Sustainable Tourism Partnership for the Brecon Beacons is well placed to secure this approach and will have responsibility for coordinating the implementation of this strategy and action plan. However, it should also be read and used as a guideline by all those with an interest in tourism in the Brecon Beacons.

How was the strategy prepared?

The strategy has been based on extensive research and consultation, including:

- Working through previous and current policy documents, research studies and reports
- Analysing existing product and market data
- An on-line survey of tourism enterprises, achieving 165 responses
- Structured interviews with key representatives of public agencies, NPA staff, private interests (especially the COLLABOR8 clusters) and organisations responsible for conservation of the natural and cultural heritage
- Visits to key sites and a number of recent developments
- A session at the Tourism in Action Conference on 2nd March 2011
- A stakeholder workshop held on 10th May 2011 at The Castle Hotel, Brecon
- A meeting with Brecon Beacons Tourism on 24th May 2011
- An open meeting with NPA Members and staff on 15th June 2011
- A meeting of key partners on 21st June 2011
- Meetings of the Sustainable Tourism Partnership on 13th July and 12th October 2011
- An open meeting with members of the National Park Authority on 3rd November 2011

What does this document contain?

The document is in four sections: an assessment of the current position; a presentation of the strategic approach and objectives; an identification of priorities for action; and a statement about delivery structures and implementation.

2 ASSESSMENT

This section summarises the findings of the research and consultation undertaken. It looks first at the general context for tourism in the Brecon Beacons, the resource base of the area and the tourism offer. It then considers how tourism has been performing, the profile and reaction of visitors, and the needs and perceptions of enterprises. Following a wider look at external factors, it ends with a summary of strengths, weaknesses, opportunities and threats.

2.1 Economic, social and environmental context

The Brecon Beacons is a living and working landscape, one of three National Parks in Wales designated under the 1949 National Parks and Access to the Countryside Act. The current framework of the National Parks is the Environment Act 1995 which set out the Parks' two purposes, as follows:

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Parks
- To promote opportunities for the understanding and enjoyment of the special qualities of the Parks by the public.

As IUCN Category V Protected Areas, they also have a statutory duty to seek to foster the economic and social well-being of local communities. This statutory duty is to be carried out with the Park's purposes in mind.

The Second Purpose makes reference to the special qualities of the National Parks. Consultation during development of the current management plan enabled a wide group of stakeholders to become involved in identifying the special qualities of the Brecon Beacons and, although not exhaustive, the following list captures the most common themes¹:

- A National Park offering peace and tranquillity with opportunities for quiet enjoyment, inspiration, relaxation and spiritual renewal
- A feeling of vitality and healthfulness that comes from enjoying the Park's fresh air, clean water, rural setting, open land and locally produced foods.
- A sense of place and cultural identity - "Welshness" - characterized by the indigenous Welsh language, religious and spiritual connections, unique customs and events, traditional foods and crafts, relatively unspoilt historic towns and villages, family farms and continued practices of traditional skills developed by local inhabitants to live and earn a living here, such as common land practices and grazing.
- A sense of discovery where people explore the Park's hidden secrets and stories such as genealogical histories, prehistoric ritual sites, relic medieval rural settlements, early industrial sites, local myths and legends and geological treasures from time immemorial.
- The Park's sweeping grandeur and outstanding natural beauty observed across a variety of harmoniously connected landscapes, including marvellous gorges and waterfalls, classic karst geology with caves and sink holes, contrasting glacial landforms such as cliffs and broad valleys carved from old red sandstone and prominent hilltops with extensive views in all directions.
- A working, living "patchwork" of contrasting patterns, colours, and textures comprising well-maintained farmed landscapes, open uplands, lakes and

¹ BBNPA Management Plan 2010 -15

meandering rivers punctuated by small-scale woodlands, country lanes, hedgerows and stone walls and scattered settlements.

- Extensive and widespread access to the Park's diversity of wildlife and richness of semi-natural habitats, such as native woodlands, heathland and grassland, natural lakes and riparian habitats, ancient hedgerows, limestone pavement and blanket bogs including those of international and national importance.
- In the context of the UK, geographically rugged, remote and challenging landscapes.
- Enjoyable and accessible countryside with extensive, widespread and varied opportunities to pursue walking, cycling, fishing, water-based activities and other forms of sustainable recreation or relaxation.
- An intimate sense of community where small, pastoral towns and villages are comparatively safe, friendly, welcoming and retain a spirit of cooperation.

Living and working in and around the Brecon Beacons

In contrast to Snowdonia and Pembrokeshire Coast National Parks, the geology and associated industrial heritage of the wider area have placed the Brecon Beacons at a point of transition between the populated and urbanised Welsh valleys to the south and the more pastoral landscapes of Mid Wales. 33,000 people live within the Park's boundaries. Brecon is the largest settlement with 7,900 people and almost one half (46%) of the Park's inhabitants live within the settlements of Brecon, Hay-on-Wye, Crickhowell, Gilwern and Talgarth. The western part of the National Park is less densely populated than the east.

By comparison, neighbouring settlements to the south and the east are generally much larger², including Abergavenny (14,055) Pontypool (35,447), Brynmawr (14,722), Ebbw Vale (18,558), Tredegar (14,802), Merthyr Tydfil (30,483), Ystradgynlais/Ystalyfera (10,106), Brynaman (5,600) and Ammanford (12,615). To the west are the smaller but significant settlements of Llandeilo (1,731) and Llandovery (2,235). Other large towns not far from the Brecon Beacons include Newport (116,143), the Rhondda Valley towns (59,602), Cwmbran (47,254) and Neath (45,898) as well, of course, as Cardiff (292,150) and Swansea (169,880).

The birth rate (ages 0-5) in the Park is slightly below the national figure, and the proportion of people in age groups over 60 is slightly higher. There is an outflow of younger people aged 18-30, especially females. Future population is forecast to decline naturally but the counter trend of in-migration is likely to lead to an overall increase. The attractive location, combined with easy access to the M4 corridor, makes the Brecon Beacons a desirable place to live for commuters and retirees. This has increased pressure on housing and house prices – the area has a high ratio of house price to income. This, combined with the current trend towards more and smaller households, has made it very difficult for many people on low incomes, including young local people, to live and work in the area.

The remoteness and unspoilt quality of the area is valued by many of its residents, including the indigenous population as well as significant numbers of people who choose to live here.

² 2001 UK Census figures

A higher than average proportion of residents are economically active than in Wales as a whole (65.2% compared with 61%)³ and double the average number of those are self-employed (15.2%, compared with 7.7% in Wales).

Brecon is an important administrative centre with local authority, National Park, Police and Ministry of Defence offices. This influences the employment structure of the Park in which 33% of employment is in public administration, education and health. The tourism related sector (distribution, hotels and restaurants) has the next highest proportion of employment of at 21%. Manufacturing (11%), and banking, finance and insurance (10.5%) follow, with agriculture at 7%. Between 1991 and 2001, the proportion working in agriculture had fallen from 10% to 7% while tourism related sectors increased by about 2%. While the amount of land in farm holdings has remained relatively stable, the number of holdings has declined slightly in recent years probably due to farm amalgamations along with a fall in the number of full time farmers, some of whom may be taking part time work off the farm.

Administratively, the Brecon Beacons National Park includes parts of nine Unitary Local Authorities - Blaenau Gwent, Caerphilly, Carmarthenshire, Merthyr Tydfil, Monmouthshire, Neath Port Talbot, Powys, Rhondda Cynon Taf and Torfaen. The largest area is in Powys, followed by Carmarthenshire and Monmouthshire. Caerphilly and Neath Port Talbot have such small holdings within the Park that they take no direct involvement in the National Park Authority.

The BBNPA is the planning authority for the National Park area, whilst the Unitary Authorities retain responsibility for all other local government services. There are also 50 Community Councils within the Park area.

Table 1 shows the share of National Park population and area for each of the three Unitary Authorities with major holdings within the Park. It can be seen that the part of the Park within Carmarthenshire is considerably less densely populated than the part within Monmouthshire, with Powys placed somewhere between the two.

Table 1

Unitary Authority	% of National Park population	% of National Park area	Ratio (% population:% area)
Powys	70	66.1	1.06
Carmarthenshire	5	16.7	0.30
Monmouthshire	21	11.1	1.90

The Wales Index of Multiple Deprivation reveals that there is a sharp contrast between most of the communities within the Brecon Beacons and some of its neighbouring authorities. The National Park area contains some of the least deprived parts of Wales, including those parts within Powys and Monmouthshire. However some of the most deprived parts of Wales border the National Park to the south, including the Unitary Authorities of Merthyr Tydfil, Blaenau Gwent and Rhondda Cynon Taf. The most deprived local authority in Wales is Merthyr Tydfil, with 25% of its small areas in the most deprived 10% in Wales, followed by Blaenau Gwent (23%) and Rhondda Cynon Taf (18%). There are small pockets of relative deprivation in Brecon, Ystradgynlais and other neighbouring local authority areas of Neath Port Talbot and Caerphilly to the south.

The natural heritage of the Brecon Beacons

³ Brecon Beacons State of the Park Report, BBNPA, 2006

The Brecon Beacons National Park contains some of the most spectacular upland landforms in southern Britain, including the distinctive table topped summits of Pen-y-Fan, Corn Du and Fan Brycheiniog. The diverse landscape of the National Park covers 1347 km² (520 square miles) with sweeping uplands above green valleys and rolling farmland, and there are many wooded areas, forests, reservoirs, meandering rivers, gorges, hidden waterfalls and caves to explore.

The bulk of the Park is underlain by Old Red Sandstone, rocks of Devonian age. These form the characteristic north and north-east facing escarpments of Y Mynydd Du (The Black Mountain), Fforest Fawr, the Brecon Beacons and Black Mountains, which give the Park its highest peaks, including Pen-y-Fan, the highest peak in southern Britain at 886m.

While the whole of the National Park is an IUCN Category V Protected Landscape, in 2005, the western half of the Park was additionally designated as a European Geopark, the first in Wales. Fforest Fawr Geopark covers 763 km² (300 square miles), stretching from Llandovery in the north to the edge of Merthyr Tydfil in the south, from Llandeilo in the west to Brecon in the east. The Geopark includes the older Ordovician and Silurian rocks of Mid Wales in the north-western corner of the National Park and, in the south of the Park, very significant limestone pavements and cave systems. Four of the five longest cave networks in the UK are in the Brecon Beacons.

Millstone Grit scarps and plateaus lie further south again, whilst Coal Measures outcrop along the Park's southern boundary. The Blaenavon Industrial Landscape was designated as a World Heritage Site in 2000, its outstanding and remarkably complete remains providing evidence of the pre-eminence of South Wales as the world's major producer of iron and coal in the 19th century. 48% of this internationally significant cultural landscape is within the Brecon Beacons National Park.

The Park was glaciated during the last Ice Age, as shown by the characteristic U-shape of the valleys and the presence of glacial features in valley bottoms. Although nowhere in the Park is totally natural there are many rich habitats for wildlife, such as upland heaths, bogs, unimproved grasslands, hay meadows, ancient woodlands and watercourses. Over 90% is agricultural or pastoral land, including hedged fields and the upland commons, grazed mainly by sheep.

11 Special Areas of Conservation cover 2% of the Brecon Beacons National Park, most notably the River Usk which runs nearly the length of the Park from west to east. The Park contains 19 geological and 64 biological SSSIs, together covering over a quarter of the Park's land area. Llangorse Lake is the largest natural lake in South Wales and it contains the only crannog (early medieval man-made island) in Wales. The Waterfalls Area at Pontneddfechan is the greatest collection of waterfalls within a small area in the UK.

The National Park contains over 8,000 individual species, a concentration of biodiversity resulting from the varied landscape and relatively low intensity of land management and development. The diverse landscape of the BBNP provides habitat for many wild species, including buzzards, raven, peregrine falcon, red kite and arctic-alpine plants such as purple saxifrage, and is one of the last outposts for Welsh Mountain Ponies to breed, live and run wild. The Park contains 21 UK priority habitats and 48 UK priority species.

The National Park Authority itself is the single largest landowner in the National Park. The BBNPA owns 14% of the Park, a higher proportion than in any other UK national

park, mainly upland common land purchased for it to be managed in co-operation with graziers for the benefit of the public. Other institutional landowners with large holdings include the Forestry Commission (7.1%), Welsh Water (3.9%), the National Trust (3.7%) and Countryside Council for Wales (0.8%). Remaining parts of the Park (65%) are privately owned.

Cultural heritage in and around the Brecon Beacons

The cultural heritage includes the historic landscape and built environment, archaeology, conservation areas, and local skills, crafts and traditions.

Place names tie together culture, landscape and heritage. To anyone with an understanding of the Welsh language, these names reveal another layer of detail about the area. Past settlements and lost dwellings linger on in names and features on maps. Welsh is a language rich in terms for natural features, many of which occur and recur throughout the Brecon Beacons, often associated with the geology or geography of a particular area.

The landscape has been shaped by humans over millennia. There are Neolithic long cairns, Iron Age hill forts, Roman roads and Norman castles to discover and Industrial heritage includes disused quarries and ironworks, former railways, the Monmouthshire and Brecon canal and several reservoirs. Centuries of unrest along the border with England are reflected in Offa's Dyke running down the east edge of the Park and several medieval castles.

The Blaenavon industrial landscape and its surrounding area, now a World Heritage Site, is one of the most significant examples of industrial growth during and after the Industrial Revolution. For this reason, it serves as an exemplar and gateway to the wider Heads of the Valleys area. There are still remains of the coal and ore mines, quarries, railway system, furnaces, workers' homes and community buildings.

The Monmouthshire and Brecon Canal is also part of the legacy of the industrial past, which will celebrate its bicentenary in 2012.

The built heritage reflects local materials from the landscape, with a rich legacy of half-timbered buildings and the use of local stone in churches and larger houses. There are 1,943 listed buildings, 268 scheduled ancient monuments, 4 registered historic landscapes and 17 registered historic parks and gardens

With a number of partners, Cadw has been involved with recent works on heritage buildings, including Tretower Court, Carreg Cennan Castle and at Blaenavon. The Blaenavon Forgotten Landscapes Project will help conserve and restore the built and natural landscape features around the Blaenavon Industrial Landscape World Heritage Site. A major grant from the Heritage Lottery Fund in 2008 is helping improve access and supporting educational projects, encouraging more local people to become involved in their heritage landscape.

A strong sense of community underpins many parts of the Brecon Beacons. In the south of the Park and beyond, this relates to a very recent past connected with coal mining and industry; further north, and especially in the far west, it is built around farming activity and, in many areas, a strong tradition of common grazing.

The Brecon Beacons National Park is a living and working landscape. Farming is a major influence on the landscape, with rough grazing on the open hills and commons and a patchwork of lowland fields dotted with farms, villages and small market towns.

More than 200 farm holdings were recorded as in Tir Gofal⁴ (agriculture conservation) schemes, covering 15.6% of the Park. This has been superseded by Glastir. Agricultural shows feature prominently in the local calendar of events. The Brecon County Show, which regularly attracts 20,000 visitors, is organised by the Brecknockshire Agricultural Society, the oldest agricultural society in the UK.

A number of community projects offer an opportunity for visitors to share in the local heritage, right across the Park from the Black Mountain Centre at Brynaman, to the Crickhowell Resource and Information Centre. Two projects, the restoration of Talgarth Mill and Myddfai Community and Visitor Centre, have received national attention in 2011 from the BBC through Village SOS, supported by the Big Lottery. Through its work with local clusters of businesses, COLLABOR8 has been able to support new events in the community, including the successful launch of Llandoverly Sheep Festival. The Geopark has a particular focus on community involvement.

Approximately 35 local cultural events and food festivals are held in the Park each year amongst the best known are Brecon Jazz Festival, the Green Man Festival, the Hay Festival of Literature, the Crickhowell Walking Festival and the Abergavenny Food Festival.

The artists and craftsmen create the cultural heritage of the future, often deriving inspiration from the local landscape and its stories and characters. An important artistic community was based around Capel y Ffin, and attention is now being drawn to the area by contemporary poet and writer Owen Sheers. Artbeat Brecon, a group of local artists has taken a lead in promoting Brecon Arts Week, while Theatr Brycheiniog provides a focus for what is otherwise currently a fairly limited evening entertainment offer.

2.3 The tourism resource

The overall tourism offer of the Brecon Beacons as a destination is based around its exceptional natural and cultural heritage, but the first point of contact for many visitors will be with one of the many enterprises providing a service that meets one or more their needs and/or those of local residents.

Accommodation

The bedstock analysis used as the basis for the STEAM Report 2010 suggests that over 10000 sleeping spaces maybe available in serviced and non-serviced accommodation across the Brecon Beacons. Non-serviced accommodation accounts for almost four times as many bedspaces as serviced accommodation. The largest category of accommodation is touring caravans/camping, accounting for almost one half (47%) of all bedspaces, many of which may be seasonal. Self-catering accommodation, even excluding all camping and caravans, accounts for more bedspaces than all serviced accommodation.

Bedstock analysis⁵

Accommodation Category	Establishments	Beds/Sleeping Spaces
<i>Serviced accommodation</i>		
+50 room hotels	-	-
11-50 room hotels	23	993

⁴ Brecon Beacons National Park Management Plan, BBNPA, 2010

⁵ Brecon Beacons National Park STEAM Report 2010

<10 room hotels/others	148	1127
Serviced total	171	2120
<i>Non-serviced accommodation</i>		
Self catering	283	2361
Static caravans/chalets	5	360
Touring caravans/camping	60	4725
Not-for-hire statics	-	476
Non-serviced total	348	7922
Total	519	10042

The tourism industry is made up of a large number of generally small enterprises. Brecon Beacons Tourism numbers 171 accommodation providers amongst its members, including members representing significant numbers of properties, such as Brecon Beacons Holiday Cottages (384 properties), the YHA (3 hostels) and the Association of Bunkhouse Operators. The majority of hotels in and around the Brecon Beacons are in membership (15 members), together with around 60 B&Bs, 70 self-catering properties, and 19 bunkhouses/hostels. The five camping/caravan sites in membership significantly under-represents the presence of this important sector in the National Park.

There are perhaps 22 larger accommodation establishments (6+ rooms) in and around the Park which associate themselves in some way with Brecon Beacons Tourism or the National Park. Together, they provide just short of 400 rooms, of which 70% are quality assured (10% graded 5*; 24% graded 4*; 37% graded 3*). There is slightly higher representation of 5* and 4* accommodation amongst smaller B&Bs. Six establishments, including one of sixteen hotels, received a Visit Wales Gold Award in recognition of outstanding quality, exceptional comfort and hospitality in the serviced sector in Wales. Serviced accommodation is most prevalent in the eastern half of the Park.

The Green Tourism Business Scheme has been recognised in Wales as an alternative to the Green Dragon environmental management scheme, and was recently introduced in the Brecon Beacons National Park with support from COLLABOR8. Over 20 businesses have been assessed, with 7 achieving the Gold standard and 12 Silver awards.

Self catering accommodation is a product strength for the Park, with many high quality properties often located in stunning settings, offering accommodation for 2 people up to large groups, spread throughout the Park. Brecon Beacons Holiday Cottages is a long-established agency based within the National Park, offering over 380 graded properties in and around the area. A more recent addition, Sugar and Loaf is based in Abergavenny and has been building a portfolio of more than 30 properties in the Brecon Beacons and Black Mountains.

The Association of Bunkhouse Operators has existed for over 15 years; it started in the Brecon Beacons, where the bulk of its membership remains, but has now expanded to cover the whole of Wales. 22 bunkhouses are located in or near to the Brecon Beacons National Park.

Camping and caravanning is an important sector, with a significant number of touring and static pitches across the Park. At least 3 sites are graded 5* and 3 hold a David Bellamy Gold Conservation Award. They range from small certificated sites with 5 seasonal pitches to large sites of 144 pitches, and at least one large site that is open all year.

A number of accommodation establishments have documented information about their accessibility to those with limited mobility.

Visitor attractions

A number of visitor attractions in and around the Brecon Beacons are highly visible and play an important role in raising the profile of the area, while others are generally small in scale and relatively low key.

	Attraction	Number of visits	Entry	Open
NMGW	Big Pit National Coal Museum	155,631	Free	Year round
NPA	Brecon Beacons NP Visitor Centre	142,809	Free	Year round
FC	Garwnant Visitor Centre	110,000	Free	Year round
NPA	Craig-y-nos Country Park	97,814*	Free	Year round
	Brecon Mountain Railway	71,298	Paid	Year round (not Nov)
	Dan Yr Ogof, National Showcaves Centre for Wales	69,057*	Paid	Seasonal
NT	Newton House, Dinefwr Park and Castle	68,160	Paid	Year round
LA	Cyfarthfa Castle Museum & Art Gallery, Merthyr Tydfil	66,874	Free	Year round
	Llancaiach Fawr Manor, Treharris	45,587	Paid	Year round
	Cantref Adventure Farm park	41,200*	Paid	Seasonal
	Brecon Cathedral and Heritage Centre	30,000*	Free	Year round
	Blaenavon World Heritage Centre	29,181	Free	Year round
	Pontypool Museum	28,435*	Paid	Year round
	Brynich Play Barn, Brecon	28,000*	Paid	Variable
LA	Abergavenny Museum and Castle	25,827	Free	Year round
NT	Aberdulais Falls	25,705	Paid	Year round
Cadw	Blaenavon Ironworks	23,135		
LA	Brecknock Museum and Art Gallery, Brecon	20,629	Free	Year round
With Cadw	Carreg Cennan Castle, Llandeilo	19,650	Paid	Year round
NPA	Waterfalls Centre, Pontneddfechan	17,829*	Free	Year round
	South Wales Borderers Regimental Museum, Brecon	15,693*	Paid	Year round
	Pontypool and Blaenavon Railway	13,767	Paid	
Cadw	Tretower Court	13,636	Paid	Year round
	Blaenavon Cheddar Co and Mountain Tours	2,474	Free	Year round
	Shell Grotto, Pontypool	1,362	Free	
	Penderyn Distillery, nr Aberdare		Paid	Year round
	Erwood Station Craft Centre		Free	Year round
	Llanthony Priory		Free	Year round

NPA	Llandovery Heritage Centre		Free	Year round
	Black Mountain Red Kite Feeding Station		Paid	Year round
	Goytre Wharf and Canal Visitor Centre		Free	Year round

NT (National Trust), FC (Forestry Commission), NMGW (National Museums and Galleries of Wales), LA (Local Authority), NPA (National Park Authority)

Source: Visits to Tourist Attractions, Visit Wales 2010

*Figure published in Visits to Tourist Attractions, Visit Wales 2009

The four most heavily visited attractions are free at the point of entry and are owned and managed by the public sector, two of which are the responsibility of the National Park Authority. The most frequently visited attraction is Big Pit, located at Blaenavon just outside the National Park. The other three most visited attractions combine an outside experience with indoor facilities. Two are on the southern edge of the Park, close to centres of population. The National Park Visitor Centre performs exceptionally well, given its rather more remote location. The visitor centre at Craig-y-Nos has now closed, but access to the Country Park continues and new catering facilities have recently opened in its place.

Two private sector operations, Brecon Mountain Railway and the National Showcaves Centre, each attracted around 70,000 visits in 2010, although a planned reduction in marketing spend was associated with visits to the National Showcaves Centre being 20% down on 2009 while there was a small growth in visits to the Brecon Mountain Railway. Two other attractions with a similar number of visitors, Newton House, Dinefwr, and Cyfartha Castle, are beyond the National Park boundary.

Cultural attractions, including Brecon Cathedral and the Brecknock Museum and Art Gallery⁶, attract a reasonable number of visitors, but have capacity to cope with many more. Taken together, there is a high number of visits to the cluster of attractions associated with the World Heritage Site. Some smaller heritage properties, especially those in an outstanding rural setting such as Carreg Cennan Castle, Llanthony Abbey or Tretower Court, add considerably to visitor interest. There are interesting churches in towns, villages and hamlets across the whole area.

The first visitor attraction in the Brecon Beacons to join the Green Tourism Business Scheme, the Barn at Brynich and the Play Barn, is currently awaiting grading. The National Showcaves Centre for Wales has plans to become the first visitor attraction in Britain to be completely self-sufficient in energy, with the introduction of a new hydro plant.

By far the majority of the main visitor attractions are open year round, although some have restricted opening hours in winter. In contrast with some other rural destinations, there is good access in general outside the main season.

Brecknock Wildlife Trust (BWT) manage a number of varied nature reserves across the Brecon Beacons; although none of them offers any particular visitor facilities, some have simple car parking and waymarked trails.

Access by public transport

⁶ Brecknock Museum and Art Gallery has recently close for a period of major refurbishment

The ability to explore the area using public transport is an important factor for many visitors and an important element in sustainable tourism. The main Cardiff-Manchester line offers a frequent mainline service providing excellent rail access to and from Abergavenny with reasonable bus links to Brecon. Hereford, on the same line, is also a useful railhead for visitors heading to Hay on Wye and even Brecon by bus. To the west of the National Park, the Heart of Wales line has four services a day to Llandovery, Llandeilo and several smaller stations from Swansea and Shrewsbury, with is an active community rail partnership for the line. Trains run from Cardiff to Merthyr Tydfil every half hour.

Brecon can be reached by national coach services and is on the Traws Cymru bus network across Wales. It is seen as a strategic hub in transport terms. Most of the National Park is served by public bus services. The National Park's Visitor Transport Initiative has focussed on making information on bus routes and times easier for visitors to understand and access through its leaflets and new website.

Beacons Bus, a network of specially commissioned buses brings people to the National Park from 8 major towns and cities on summer Sundays and bank holidays when many regular services are absent. Operating around a central hub in Brecon, the network provides a choice of opportunities to reach many destinations around the National Park. The service from Cardiff to Brecon also carries bikes and has become very popular in recent years.

The National Park has published a series of Car Free Days Out leaflets to encourage visitors to explore without using their cars. Individual leaflets are based around themes such as History and Heritage, Parks and Picnics, and Caches and Co-ordinates (geo-caching). Detailed information is also provided about travel by public transport to over ten of the main visitor attractions in the Park. In 2011, a Travel Challenge is being run to highlight the range of travel opportunities, including walking, cycling, riding, canal boats, canoeing etc as well as public transport.

In 2011, two electric buggy vehicles (b-bugs), built by a local company, have been made available to visitors for trial, with support from the Welsh Government.

Provision for walking

The Brecon Beacons offer the most extensive and spectacular upland walking in southern Britain, and walking is the most significant outdoor activity in the National Park.

There are approximately 2003km of public rights of way in the National Park, comprising 1,470km of footpaths, 344km of bridleways and 189km of restricted byways and byways open to all traffic. Together with upland paths, unsurfaced tracks and forestry tracks, this brings the total to about 3,848 km of linear access. Since the Countryside and Rights of Way Act 2000, 800km² of open access land has been made available to walkers, representing about 60% of the Park. This includes most Forestry Commission land⁷ and also common land, covering 35% of the National Park, which is mostly owned privately but commoners have rights to graze animals. Larger areas of common land include the central area of the Beacons,

⁷ Some 10,000 hectares of the Park is Forestry Commission Wales managed woodlands

donated to the National Trust in 1965, and some areas owned by the National Park Authority.

With the Pembrokeshire Coast National Park Authority, BBNPA is currently reviewing the management of their Public Rights of Way network which wheelchair users, horse riders, cyclists, as well as walkers, use to access and enjoy the countryside, in order to assess its value and effectiveness. BBNPA currently describes 76% of the network as 'available to use'

The walking resource of the National Park is varied and extensive. The resource is especially rich for those who choose to walk independently; read maps with confidence; are well prepared and experienced walkers; and are prepared to deal with any difficulties that they encounter, including obstructions and poor weather conditions.

A number of long distance trails and regional routes pass through or near the Brecon Beacons National Park, including:

- Offa's Dyke Path National Trail (Chepstow-Prestatyn, 270km), which passes along the eastern boundary of the Park, entering the Park at Pandy and leaving near Hay-on-Wye. It offers relatively easy (if high) walking and views over the Welsh Marches.
- The Taff Trail, a 93km walking/cycling route that links Brecon to Cardiff. It has a circular option for walkers around the Central Beacons area. It follows canal paths, country lanes, former railway lines and forest tracks, to cross the Brecon Beacons. The route is described in six sections as a series of leaflets (section 5 Merthyr Tydfil to Talybont-on-Usk, section 6 Talybont-on-Usk to Brecon)
- The Usk Valley Walk (Caerleon-Brecon, 80km), a waymarked path following the River Usk from its source in the National Park, to its end at the Severn Estuary. Quiet, peaceful and mostly low-level, including the towpath of the Monmouthshire and Brecon Canal.
- The Wye Valley Walk (Chepstow-Plynlimon, 218km), an attractive valley route crossing from England, via Hereford and Hay-on-Wye, into Wales. Touches on the BBNP around Hay-on-Wye.
- The Beacons Way, launched in 2005 by the Brecon Beacons Park Society as a challenging linear walk (157km) across the Brecon Beacons National Park, from Abergavenny (the Holy Mountain) to Llangadog. It is described as an 8 day walk, in daily sections of 15 –27km. The Epynt Way, an 80km permissive route around the Sennybridge Training Area developed with the Ministry of Defence.
- The Cambrian Way (Cardiff-Conwy, 440km), a tough, high-level route across the Welsh mountains, including substantial parts of the Brecon Beacons NP in its southern sections. The BBNPA currently does not promote this route.

These long distance routes require regular maintenance and investment to ensure that they continue to offer a safe, low impact and enjoyable experience. For example, improvements were made in 2011 to three sections of the Beacons Way at a cost of £92,000.

Many visitors and potential visitors to the Park are dependent on good information and easy route finding, which is supported in a number of ways.

- The National Park Authority publishes a collection of walk cards, including some of the most popular walks: Pen y Fan and Cribyn from Cwm Gwdi; The Beacons Circuit; The Sugar Loaf from Abergavenny; Llanfoist Wharf from Abergavenny; and Waterfall Country. There is also a set of wildlife walks and a booklet on how to reach the many air crash sites.

- A number of visitor centres or locations have way marked walks or are the starting point for longer walks including: the National Park Visitor Centre at Libanus; Craig-y-Nos Country Park; and Garwnant FC Visitor Centre
- Most Forestry Commission sites in the area have a choice of walking trails.
- The National Trust cares for over 5,000 hectares of the Brecon Beacons that includes some of its most popular walking areas, including Pen y Fan, Skirrid, Sugar Loaf and Henrhyd Falls.
- The National Trust *Countryside Guide to Wales* identifies three locations in the Brecon Beacons: the Brecon Beacons themselves, including Pen-y-Fan and Corn Du; Sgwd Henrhyd Falls, highlighting a 6.4km circular walk; and Sugar Loaf, indicating a 4.8km walk to the summit. In addition, *30 Places to Visit* lists Dinefwr, on the outskirts of Llandeilo, with a number of scenic walks including a wooded boardwalk.
- A variety of other walks are promoted through leaflets which have been developed by a range of organisations, including Blaenavon World Heritage Site and COLLABOR8 clusters. Examples include Bryn Oer Tramroad; Blaenavon Circular Walk; Henry Vaughan Walk; Bwlch with Altitude and Bwlch with Fortitude (12 miles and 7.5 miles) developed by the local community to link the hamlets in the Bwlch area; and walks around Talgarth, a new community researched leaflet containing 5 varied routes around Talgarth. It has often proved difficult to maintain the availability of printed information beyond the life of the original initiative to develop the route.
- Themed routes, including the Canal Food Trail, a new route developed by the NPA and British Waterways, which follows the Monmouthshire and Brecon Canal for 12km from Brecon to Talybont-on-Usk, promoting food and drink along the way.
- The National Park has produced at least five audio trails which can be downloaded from the website or from visitor centres.
- Geocaching has taken off in quite a big way in the Brecon Beacons. There are over 160 geocaches around the area and enthusiasts can buy Brecon Beacons geocoins.

Places to visit with Easier Access, published by Brecon Beacons National Park Authority, is a guide intended to give an idea of suitable places to visit in the Brecon Beacons National Park for those who are disabled, less mobile, visually impaired, elderly or parents with children in pushchairs. 28 easy routes are listed on the NPA's website and 55 routes identified on the Easier Access map.

Guided walks are offered by both the National Park Authority and the Brecon Beacons Park Society. Each of the walks run by the BBNPA follows safety guidelines set by the Adventure Activities Licensing Service (AALS), whereby NPA staff and volunteers leaders are experienced and fully trained in safety and first aid, thus increasing confidence in the offer.

As yet, no towns in the area have joined the national Walkers are Welcome scheme, although the Walking with Offa project will be addressing this in the east of the area. However two towns are involved in running their own walking festival. Crickhowell Walking Festival is a well established and popular community-led event which takes place in February/March each year, while 2011 sees the launch of the Hay on Wye Walking Festival in October. Other walking festivals are promoted by organisations with a wider remit. The Wales Valleys Walking Festival runs each September. The Monmouthshire Walking Festival is running for the second year, during October 2011. The annual Geopark Festival, which takes place over a fortnight in May/June, involves many guided walks as well as events and exhibitions.

Several challenge walking events are held each year including the Black Mountains Roundabout, the Big Black Mountains Challenge, a Midnight Challenge Walk, the Brecon Beacons Challenge Walk, Bwlch with Altitude Challenge walk, Talybont Trial, the South Wales Three Peaks Trial (Abergavenny) and the Welsh Three Peaks which includes Pen-y- Fan. There is concern developing over the impact of these events and a management methodology needs to be found to reduce this in partnership with the event organisers.

Specialist operators offer guided and self-guided walking holidays. These include Williams Welsh Walks (day walks only), Drover Holidays, Celtic Trails, Treads and Trails, Marches Walks, Mountain and Water and Contours. Several operators offer baggage transfer between accommodation or a specialist pick-up and drop-off service for walkers.

The particular combination of geology and patterns of use in the Brecon Beacons has meant that upland path erosion in the National Park is a significant problem across all upland areas of the Park. The BBBNPA consider that reducing upland path erosion is important because it negatively impacts on the two Statutory Purposes of the NPA, it can reduce peoples' enjoyment of the area and can have a negative impact on flora, fauna and landscape of the area. A succession of upland path repair projects have been carried out over many years by the NPA and its partners, including the National Trust, to minimise erosion to upland paths. In 2007, the NPA prepared an Upland Erosion Strategy, which identified an approximate requirement for resource allocation being required as follows: £336,000 in the west, £1.6 million in the east and £1,065,000 in the central area. The National Park Authority has a current Improvement Objective to minimise damage to the Park's environment, which includes an Upland Landscape Management Project with targets for repair of eroded upland paths and the recovery in condition of associated land.

Pen-y-Fan experiences particularly intensive levels of use. The National Trust, which owns and manages large parts of the Central Beacons, has been running a major appeal to support their ongoing programme of footpath repair. It estimates that each year 150,000 people tread the slopes of this central area, equivalent to the number of visitors to Big Pit or the National Park Visitor Centre. The Trust has recently acquired additional land at Pont ar Daf in order to introduce major new facilities for walkers, designed to improve the walking experience and the Trust's ability to manage access by walkers.

The Waterfalls Area, which also experiences heavy use in a relatively confined and sensitive area, also suffers path damage. The Waterfall Country Management Plan 2010 includes a footpath work plan to withstand the pressures of visitors as well as climate.

The cycling product

The Brecon Beacons NPA has paid particular attention to cycling and mountain-biking, most recently through COLLABOR8, with investment in route development and encouragement given to tourism businesses to make good provision for cyclists. Two dedicated NPA websites, one for cycling and one for mountain biking, detail routes, providers etc and give safety advice. Provision for cycling is especially good in the east of the Park. The growing importance of cycling to the Brecon Beacons led to the preparation of a Brecon Beacons Cycling and Mountain Biking Strategy in 2009.

Two National Cycleway Network (NCN) routes cross the Brecon Beacons:

- The Taff Trail (NCN 8) runs south from Brecon, past Talybont Reservoir to Merthyr Tydfil and Cardiff. Much of the 55 mile (88km) route is traffic free. NCN 8 also continues north as Lon Las Cymru, from Brecon via Hay on Wye to Holyhead.
- NCN 42 is an alternative stretch of Lon Las Cymru south from Hay to Abergavenny, via the Llanthony Valley and on to Chepstow.

In addition NCN 46 is a traffic free route linking Brynmawr and Abergavenny in the south east of the National Park. Work is progressing on a Heads of the Valley route which will link Merthyr Tydfil and Brynmawr, connecting routes in the Beacons into a full circular NCN route.

The western half of the National Park has no NCN routes. Route 43 north from Swansea has just reached the edge of the National Park at Coelbren near Ystradgynlais. The hope is that it will follow the disused railway line up the Upper Swansea Valley and past Crai reservoir to Sennybridge and Brecon.

There are also aspirations, led by Sustrans, to develop a full network of traffic free routes across South Wales including a route west from Brecon to Llandovery and Llandeilo. The addition of such routes would provide a wide choice of long circular cycle rides, around and through the National Park, with considerable potential to market longer cycling breaks and long distance rides.

Proposals for long distance road based routes include an Offa's Dyke cycle route which would run down the east of the National Park along the border with England. An east-west route across the north of the Park has also been discussed.

Brecon was selected some years ago by Visit Wales to be a cycling hub under their Cycle Breaks banner. A pack was developed, with maps and descriptions of five circular routes from Brecon (6-52 miles) on quiet roads, together with listings of cycle friendly accommodation, cycle hire and cycle shops, plus details on transport and sources of information. Take-up was moderate, but the Brecon Beacons Cycling and Mountain Biking Strategy has proposed a similar idea to develop a choice of circular routes from hub towns around the Park.

Six traffic free cycling routes of 5-12 miles are currently promoted at locations across the National Park, including the Usk Reservoir, Garwnant Forest, Brecon to Brynich Lock, Talybont Reservoir, and Llanfoist (Clydach Gorge and Goytre Wharf). Further stretches of the Monmouthshire and Brecon Canal are likely to be improved and opened for cycling over the next few years, with the ultimate goal of opening the whole length of the canal to cyclists.

There is a lack of traffic free routes in the north east and central-south west areas of the National Park. Powys County Council plan a feasibility study into a disused railway line route from Hay to Glasbury. They hope also to look at the disused railway line from Sennybridge to Brecon, which may require a new bridge across the Honddu at some point.

In terms of mountain biking, the area is relatively well provided with routes to suit all abilities. Five towns (Brecon, Crickhowell, Sennybridge, Talgarth and Talybont) were designated as hubs for the development of the first mountain biking pack for the Brecon Beacons, which included fourteen single track mountain bike routes, spread between the following standard mountain biking grades:

- Yellow - a fairly flat route of less than 8km (1 route)

- Green - moderate route of up 8-20km (2 routes)
- Blue - moderately steep route of 8-25km (4 routes)
- Red – steep routes 30-40km (6 routes)
- ‘Killer’ Black – extreme terrain over 50km (1 route)

The pack was revised and relaunched in 2010, with the addition of Abergavenny as a hub town. Businesses in Llandoverly have expressed interest in becoming the hub town for the west of the National Park.

The Forestry Commission has been reluctant to increase the number of mountain biking routes on its land due to the maintenance requirements.

Cycle hire is available in most towns, including some electric bikes. Some cycle hire businesses will deliver bikes to holiday accommodation direct. Cycling holidays are promoted by a number of operators based in the area and further afield.

About 70 accommodation businesses in the National Park are accredited ‘Cyclists Welcome’ by VisitBritain, having satisfied a checklist of cycling related criteria when being inspected for their standard accommodation grading. In addition, many bunkhouses and YHAs around the National Park have good facilities for cyclists.

Cycling and mountain biking events include:

- Abergavenny Festival of Cycling (late June), which includes a variety of different races and events and in 2011 also incorporated the Tour of the Black Mountains road race which has been run for several years.
- The Brecon Beast (mid-September), a 60 or 100km mountain biking race
- The Dragon Ride (early June), a non-competitive cyclo-sportive race which often includes parts of the National Park in its longer rides.
- The Lon Las Cymru Challenge event, which comes through the area

Provision for horse riding

The Brecon Beacons offers good access for horse riders. This is a strength compared to some other rural areas, with a relatively high proportion (28%) of the rights of way network designated bridleway or byway. Around 12 riding businesses across the National Park offer a range of riding experiences, including trekking trips and accommodation for visitors bringing their own horses to the area. A cluster of four riding and trekking businesses promote half and full day rides in the Black Mountains area under the banner ‘Ride Brecon Beacons’. Three riding centres/companies offer multi day riding holidays along linear routes. The smaller number of riding establishments in the west of the Park results in less of a co-ordinated approach. A dedicated website www.horseridingbreconbeacons.com, which brings together all the relevant information, has been developed through the National Park Authority. 16 B&B businesses which welcome riders and horses are listed.

Several specific riding routes are promoted with dedicated print:

- The Three Rivers Ride from Craswell near Hay on Wye, around the northern fringes of the Brecon Beacons to Libanus, a distance of 35 miles.
- The Brecon Beacons and Radnor Loop, a four day 75 mile circular ride linking four B&Bs which all welcome riders and their horses.
- The Black Mountains Riding Loops, a selection of five routes of between 12 and 34 miles.

In addition:

- The Radnor Forest Ride joins the Three Rivers Ride at the Brecon Beacons National Park Visitor Centre, travelling 70 miles across to join the Jack Mytton Way in Shropshire.
- The Epynt Way, a circular permissive bridleway of 90km is also used by riders.
- Further routes have been developed in the Blaenavon area, including the Furlong Route Ride, a network of three linking loops providing 20 kms of riding through the World Heritage Site.
- The Forestry Commission manage a number of riding routes in forests, including Crychan Forest near Llandovery.

Water based activities

The Brecon Beacons National Park includes 140 miles of river, 35 miles of canal, Wales' largest natural lake and nine reservoirs.

It is a priority for the National Park to increase access to inland water and a preferred strategy of the Welsh Assembly Government to create a hub in the National Park for water recreation. A Beacons Splash Project was launched in March 2010 with support from the Environment Agency, with the aim of promoting watersports in the National Park. Splash Brecon Beacons is a dedicated website giving information about water activities in the National Park.

The River Wye, which dips into the north eastern corner of the Park, is navigable below Hay-on-Wye, but there is no right of navigation on the Usk. Through the Wye and Usk Foundation (WUF), an access agreement is in place on the upper River Usk between Sennybridge and Crickhowell, and on reaches of River Wye above Hay-on-Wye, permitting canoeing at certain times of the year and at certain river heights, although this is not agreed by the official canoeing bodies.

In partnership with Brecon Beacons National Park, WUF have recently upgraded and improved access/exit points for canoeists, while BBNPA and British Waterways have added an extra access points at Brynich Lock and Brecon. With the support of the Environment Agency, Brecon Beacons Trust and British Waterways, The Beacons Water Trail has recently opened, enabling canoe touring on the River Usk and Monmouthshire and Brecon Canal from Brecon to Talybont, with plans for future improvements and extensionl.

A new licensing arrangement with Welsh Water has been negotiated which will facilitate access for the first time in 20 years for canoeing and kayaking organised by activity operators and clubs on five of their reservoirs on a trial basis. This Passport Scheme is due for launch in Spring 2012.

A Waterside Code has been adopted in Wales, organised around the themes of respect, protect and enjoy.

Sailing on Llangorse Lake is a popular activity, together with other watersports.

There is good fishing on many rivers and private fishing on many of the lakes and reservoirs. As well as being a premier Welsh salmon river, the Usk is acclaimed as one of the best wild trout rivers in the UK. The Wye and Usk Foundation (WUF) have worked with the National Park to restore the Usk as a premier salmon and trout fishery and over time to set up a fully sustainable system whereby the fishery funds the maintenance of the ecosystem. Through their Wye and Usk Passport Scheme,

WUF have also negotiated access to fisheries many of which were previously unavailable.

Commercial outdoor activity providers

The outdoor activity offer in the Brecon Beacons National Park is especially strong. The varied geology provides ideal conditions for a range of activities, including climbing, caving, gorge walking, canoeing and sailing, as well as for walking, mountain biking and riding. Combined with relatively easy access to the Gower coast, with coastering, surfing and kiteboarding, the area offers a fantastic choice of activities which can be tailored to school and youth/student groups, individuals, families and friends, beginners and specialists, stag and hen parties and corporate clients. There are a large number of commercial outdoor activity providers in and around the Brecon Beacons, targeting a range of clients. Some centres provide accommodation alongside activity facilities on their own land. Others provide expert guides to lead participants off site in walking, cycling, canoeing, caving, sailing, gorge walking, climbing etc. Some centres also offer indoor facilities such as climbing walls. There are many shops and centres where visitors can hire or buy equipment to have a go themselves.

It is difficult to quantify the number of operators – most are small businesses and some work out of Cardiff, Swansea and elsewhere bringing visitors to the Brecon Beacons. The South Wales Outdoor Activity Providers Group (SWOAPG), formed in 2010 with support from COLLABOR8, provides a representative voice for the industry, shares best practice and training opportunities between members, and co-ordinates information alerts. SWOAPG estimate that there are at least 175 activity operators, with over 165 in at least basic membership. SWOAPG has negotiated a Concordat for the Waterfalls Area between its members and Forestry Commission Wales, to help manage access to the Sychryd gorge and to conserve a sensitive environment which is heavily used by outdoor operators.

SWOAPG is acutely aware of the pressures on a number of sites which offer prime conditions for the pursuit of a particular activity, which may become a limiting factor in the capacity of the area to support commercial operations. SWOAPG have been heavily involved on behalf of their members in negotiations for the Passport Scheme referred to above, which will relieve some of the pressure on navigable stretches of river and the limited number of sites with existing access to open water.

The Black Mountains Gliding Club above Talgarth offers the opportunity to glide across the beautiful National Park scenery. There are about eight golf courses in and around the National Park.

The network of bunkhouses is especially used by groups taking part in outdoor activities. There are about 20 bunkhouses in the Brecon Beacons area, the smallest catering for just six people and the largest for over 40. The bunkhouses promote themselves collectively as the Association of Bunkhouse Operators, supported by print and a dedicated website.

The Monmouthshire and Brecon Canal

The Monmouthshire and Brecon Canal is considered by many to be the most picturesque canal in Britain. The canal is navigable for 35 miles, mostly within the National Park. It is currently landlocked although there are possible plans to reconnect it with the main UK canal network sometime in the future. The canal, which

has its 200th anniversary in 2012, follows the contours of the Usk Valley and has relatively few locks. It is a popular destination for canal boating. However, its isolation from the network means that the number of boats remains relatively static at around 400, each of which has a mooring and permit. There are six hire boat companies along the canal with about 50-60 hire boats between them. Movement along the canal halts between November and February to enable repairs to be made.

The canal is increasingly important as a resource for a range of activities, with investment in improved provision for canoeing and cycling. At least one company operates electric day boats for hire on the canal, simultaneously reducing disturbance to wildlife and other users, and also CO2 emissions.

The National Park Authority is deeply committed to working in partnership with British Waterways and Powys County Council to support the 200th anniversary celebrations in 2012. This has provided the focus for a whole host of activities and events which are seen as part of a wider approach to regeneration.

The food and drink offer

The food and drink offer in the Brecon Beacons includes many examples of excellent quality produce and eating places.

'Wales the True Taste' is a brand which promotes the very best food and drink that Wales has to offer. Food and drink businesses from the Brecon Beacons have steadily increased their profile through success in the annual awards scheme, winning 16 awards in 2011 (5 Gold Awards, 6 Silver and 5 Bronze). Success has also been achieved in other award schemes. Both hospitality businesses and food and drink producers are represented amongst those winning awards.

There are, however, food experiences which might best be described as average. With STEAM figures indicating that visitors spend more in the food and drink sector than on any other, and more than twice as much as on accommodation, this is an area which merits further attention.

There are local breweries at Brecon, Llandeilo, Abergavenny and Talgarth. Several vineyards and orchards in the eastern part of the area mean that local wines, ciders and apple juice can also be offered to visitors. Penderyn Distillery is the only Welsh Whisky producer and has developed a strong brand since launching in 2000. Local food specialities include Welsh venison, smoked cheeses, organic meat and vegetables, ice cream, honey and there are several fruit farms. There is growing awareness of the opportunities to promote and celebrate the traditional strength of the area in raising stock for lamb and beef.

It has become increasingly possible for self-catering visitors to pre-order produce for delivery to their property, and to arrange for outside caterers to deliver or prepare meals on the premises during their visit.

Abergavenny Food Festival, which started in 1999, has established a high profile nationally and together with the cluster of fine dining places in the east of the area has boosted the reputation for food and drink. Several spin-off events are now organised each year, including a Christmas Food and Drink Fair, and Brecon Beacons Tourism have submitted a proposal to develop 'Foodie Breaks' in association with the Festival and local tourism association.

A Brecon Beacons Food Festival is held in Brecon each October, with smaller food oriented events in other towns and villages. Monmouthshire has for a number of years been promoting itself very strongly for food and drink and the number of quality producers has risen in recent years. Rural Development funding has also been used to support a Taste of Powys campaign. Other recent food and drink initiatives include a listing of producers in Mid Wales, Mid Wales Local Food Talks and the national Wales the True Taste. There have been several local initiatives to boost awareness of local Welsh produce including the National Park's Black Mountains Breakfast campaign and Meet the Producer events.

There are eight farmers markets in all, including Brecon, but some towns are struggling to attract many producers and customers. In each town there are examples of interesting food shops or delicatessens and pubs serving good food. However many eating places fail to highlight local provenance or to serve any local specialities, and it can be difficult to identify local producers as information is very fragmented.

Considerable work has been undertaken in recent years to strengthen the food offer and awareness of local produce, including work by Adventa in Monmouthshire and the National Park Authority. Skills development has been supported through collaboration with partners such as Medrwn.

2.4 Tourism delivery structures and services

Key networks and organisations in tourism delivery

The **Brecon Beacons National Park Authority** is the statutory body with responsibility for conserving and enhancing the natural beauty, wildlife and cultural heritage of the Brecon Beacons, promoting understanding and enjoyment of the area's special qualities and with a duty to foster the economic and social well-being of local communities.

The BBNPA has had a specific involvement with sustainable tourism since appointing a dedicated officer in 2002, and the subsequent appointment of a Tourism Growth Area officer. More recently, COLLABOR8 funding has supported a new round of tourism activity and enabled expansion of the team. However, it is important to recognise that a wide range of the Authority's activities make an essential contribution to the performance of the area as a tourism destination, including management and provision of countryside access and infrastructure, provision of information, interpretation and ranger services, and looking after the fine landscapes and biodiversity that visitors come to enjoy.

Brecon Beacons Tourism (BBT) is a membership association of 225 tourism businesses, working together since 2006 to market and support all tourism businesses across the Brecon Beacons National Park and providing a strong tourism voice to represent the views of the industry. The organisation has evolved from a less formal group of operators into a company limited by guarantee.

Members are invited to endorse a statement of shared values, as follows:

- Work harder together to provide a distinctive experience for our visitors
- Care more for our visitors and the landscape that attracts them
- Aim further in our aspirations for a sustainable destination
- Share more our knowledge and expertise for the benefit of all

The Vision of BBT is ‘to actively work together with our business network and partners to ensure a focus on developing successful and sustainable tourism in the Brecon Beacons.’

In order to achieve this, BBT intends:

- To harness and focus the energy for tourism in the Brecon Beacons in order to encourage delivery of a high quality visitor experience
- To be the voice for tourism in the Brecon Beacons
- To facilitate effective marketing and tourism management in the Brecon Beacons
- To influence the long term marketing and development of the Brecon Beacons as a destination
- To support and assist the development of tourism businesses.
- To represent our businesses and liaise with a range of organisations to encourage positive change, development and provide coordination
- To support and consult our businesses on an ongoing basis

The BBNPA and BBT have signed a **Memorandum of Understanding** to underpin the way the two organisations relate to each other. As the **key private sector partner**, BBT took the lead for the Brecon Beacons Marketing Co-ordination Group in managing the marketing strategy in 2010 and the subsequent appointment of Alexandra Marr Associates.

In order to work as an effective and strategic partner in the marketing and management of the Brecon Beacons, Brecon Beacons Tourism also interacts with the three Regional Tourism Partnerships, Mid-Wales (the lead), South East Wales and South West Wales, as well as Visit Wales and Wales Tourism Alliance.

A new national framework for destination management, marketing and investment sets out a clear allocation of responsibilities between local destinations and Visit Wales and recommendations for partnership working within and between the public, private and community sectors.

A number of **local authorities and destination management organisations** are active in providing support for the tourism sector and relevant infrastructure and other services. These include:

- Visit Wales offers support to Destination Management Partnerships through its Regional Tourism Partnerships for Mid-Wales, South East Wales and South West Wales and a dedicated Destination Management website www.dmwales.com.
- Medrwn and Capital Region Tourism work in partnership with the Brecon Beacons National Park Authority and Brecon Beacons Tourism to deliver a programme of training courses.
- In 2011, Visit Wales has introduced a new discretionary grant scheme, the Tourism Investment Support Scheme (TISS). TISS has two arms: support for individual businesses to upgrade quality or increase capacity where there is a gap in the market, and a programme of capital investment in specific environmental and amenity improvements undertaken by destination management partnerships.
- Powys County Council have a core role in developing and promoting tourism but also runs the Glasu programme, supporting opportunities in sustainable tourism and farm diversification arising from the Rural Development Programme.
- In a similar way, Monmouthshire County Council, together with adventa, support Monmouthshire’s traditional core sectors of tourism, food and drink, arts and

crafts and festivals and events. Monmouthshire is currently exploring options to develop the existing Monmouthshire Tourism Alliance into a new strategic body for tourism in Monmouthshire, preparing a destination management plan and simultaneously reviewing its brand positioning.

- Carmarthenshire County Council run a strong marketing campaign and support product development through a range of RDP funded projects
- Torfaen County Borough Council, with particular responsibility for the Blaenavon World Heritage Site
- Merthyr Tydfil CBC, Rhondda Cynon Taff CBC, Blaenau Gwent CBC and Caerphilly CBC all have a proportion of their area within the National Park and can benefit from its presence as an additional area of interest to visitors.

Fforest Fawr Geopark is actively involved in improving the visitor experience, through development of information, interpretation and sustainable recreation. The Geopark is able to support and promote sustainable tourism and other forms of sustainable economic development in the western half of the National Park, focusing on the geological, biological and cultural heritage. There are particular opportunities to engage local communities in working towards sustainable development.

Over recent years, a number of local authorities and agencies along the England Wales border have come together under the banner of **Offa's Country** to co-ordinate activity on a number of initiatives. **Walking with Offa** is a programme of investment focused on a corridor surrounding the Offa's Dyke Path National Trail, which has recently received support as an Axis 4 Co-operation Project with funds to improve the walking offer, provide information and interpretation about Offa's Country, develop business and community engagement and training, deliver a joint walking promotion and develop and promote sustainable transport.

Marketing and information provision

Marketing

Destination promotion for the Brecon Beacons has historically been divided and dependent on the marketing of various Visit Wales Holiday Areas, including:

- Mid-Wales and the Brecon Beacons,
- Wye Valley and Vale of Usk
- Carmarthenshire
- The Valleys – Heart and Soul of Wales
- Small parts of Swansea Bay - Mumbles, Gower, Afan and the Vale of Neath.

Other than Mid-Wales and the Brecon Beacons, the current brochures of partner destinations give little recognition to the Brecon Beacons National Park as such, choosing to raise the profile of their own destination. As recently as 2009, Carmarthenshire ran the strapline 'Featuring the Brecon Beacons National Park' on the front cover, and included a two page spread on the National Park within their brochure.

Blaenavon World Heritage Site has a Marketing Co-ordination group with a marketing budget.

In 2009, the Brecon Beacons was recognised by Visit Wales as a destination in its own right. A Tourism Marketing Strategy for the Brecon Beacons was commissioned by the Brecon Beacons Marketing Co-ordination Group in 2010 and an annual action

plan has been developed, with funding sought from a number of sources. Promotional activity to date includes an extensive PR campaign and media hosting.

Visitor information – pre-arrival

The National Park Authority plays a very significant role in the delivery of information, pre- and post- arrival, as part of its activity in fulfilment of the National Park's Second Purpose.

Current activity to provide pre-visit information at a destination level includes:

- A destination website provided by Brecon Beacons Tourism, presenting detailed information on the area together with listings of attractions, activities, accommodation and other facilities provided by BBT members.
- A section of the Brecon Beacons National Park Authority website entitled *Enjoying the Park*, <http://www.breconbeacons.org/visit-us>
- Park Explorer, a recent map-based addition to the NPA website, with detailed route information and an itinerary builder.
- A long-life, fold-out leaflet, *Brecon Beacons National Park Pocket Guide*, also available to view on the website as an e-guide, giving an overview of the National Park, with a map and key messages. A charge has recently been introduced, with availability restricted to NPA centres
- Greener Holidays, produced annually by the National Park and highlighting tourism businesses that have been successful in achieving certification under the Green Tourism Business Scheme (previous publications were based around Green Dragon Environmental Award)

Visitor information – post-arrival

The area is well served by **visitor and information centres**, including some (marked with an asterisk*) which are part of Visit Wales network of Tourist Information Centres. Again, the National Park Authority is a major player in the support that this offers to visitors and also to tourism businesses.

The following centres are managed by the National Park Authority:

- National Park Visitor Centre (The Mountain Centre) at Libanus
- Waterfalls Centre, Pontneddfechan (weekends only, Oct – Easter)
- Abergavenny Tourist Information & National Park Centre* (with Monmouthshire County Council)
- Llandovery Tourist Information & Heritage Centre* (with Carmarthenshire County Council and Llandovery Town Council)

A former National Park Visitor Centre at Craig-y-Nos Country Park is now closed, but still provides a welcome information point at the café business which operates there.

Further Information Centres in and around the Park are managed by a variety of different organisations, including local authorities and community organisations:

- Blaenavon World Heritage Centre* (Torfaen CBC)
- Brecon Tourist Information Centre* (Powys CC)
- Crickhowell Resource and Information Centre (CIC)
- Hay-on-Wye Tourist Information Bureau (CIC)
- Merthyr Tydfil Tourist Information Centre* (Merthyr Tydfil CBC)
- Talgarth Information and Resource Centre (limited winter opening) (CIC)

Other, independent centres are not seen as part of this informal network, although they do provide selective information to visitors. They include the newly refurbished Forestry Commission Wales Visitor Centre at Garwnant, and a Tourist Information Point at the community-run Black Mountain Centre in Brynaman.

Currently, there is little or no co-ordination of the delivery of information about the Brecon Beacons National Park across these varied centres, although the National Park Authority does provide some pre-season training opportunities to those involved. Specialist interpretation about the Geopark has been provided at the Waterfalls Centre, the National Park Visitor Centre, the Black Mountain Centre and Llandovery Information Centre.

The National Park Authority provides a range of **printed information** material for visitors in the area. An annual Brecon Beacons National Park Visitor Guide contains an introduction to the Park with up to date information on where to go, what to see, events and places to eat and sleep. This is widely distributed in and around the Park, at public outlets and through visitor accommodation.

The National Park Authority has an Interpretation Strategy and a network of orientation and welcome signs that have been delivered at strategic locations across the Park.

Further material provided by the National Park Authority includes leaflets on events, themes and activities. Destination guides, including a series of 'At a glance' leaflets, have been produced by local business clusters for key towns and villages, supported by COLLABOR8. Such leaflets often have a limited shelf life, and provision is not always made for their replacement.

Poor signal strength has impeded development of some, but not all, mobile technology in information delivery. A selection of audio trails, downloadable from the NPA website as MP3 files, have been developed over the past few years with support from Countryside Council for Wales and the Aggregates Level Sustainability Fund. These have been designed around the for use at a range of location across the National Park, including the Fforest Fawr Geopark where some of the main interpretive themes can be explored through local stories and experts.

2.5 Tourism performance and the visitor response

Information on tourism performance and visitors to the Brecon Beacons is available from a range of sources, including annual STEAM⁸ (tourism economic model) data, the survey of enterprises carried out in 2011, results from an online visitor survey in 2010-11 (which can be compared with a similar survey in 2009), Visit Wales research and intelligence, and stakeholder consultation.

The volume and value of tourism

STEAM figures have been produced for the Brecon Beacons for a number of years, in order to provide an indication of the volume and value of tourism to the area and to monitor change over time. The calculations involved in producing the figures are not intended to produce an accurate measure at any one point in time, and individual figures should be treated with some care. However, they are the best indication that has been made available. According to the STEAM report commissioned by the

⁸ Scarborough Tourism Economic Activity Monitor

National Park Authority, tourism was worth £205.9m to the Brecon Beacons National Park in 2010.

- This represents a small growth (<1%) on the equivalent figure in 2009 and, importantly, brought a halt to a fall of 9% in the previous year.
- Nearly 4m (3,920,900) visitors spent just short of 5m (4,955,300) days in the National Park in 2010.
- Whereas there was a small growth in value over the previous year, there was a decrease in volume; tourist days fell by 1.3% and tourist numbers by 3.1%.
- The vast majority (92%) of visitors are day visitors, accounting for over 70% of all tourist days spent in the Park and almost one half (46%) of all revenue.
- This represents a very high dependency on day visitors when compared with the whole family of UK National Parks, where the Peak District would be the nearest equivalent⁹.
- Of the fifteen UK National Parks, the Brecon Beacons is ranked between 8th and 10th for tourist numbers, 11th for tourist days and 9th for visitor spend.
- Pembrokeshire¹⁰ and Snowdonia have broadly equivalent tourist numbers to the Brecon Beacons, but significantly higher tourist days and spend.
- The Geopark generates almost 70% of tourist days, not quite two-thirds of tourist numbers, and less than 60% of revenue as the Park as a whole, suggesting an even higher dependence on day visitors in the western half of the Park.
- Non-serviced accommodation accounts for over one third (37%) of revenue, almost three times the value of serviced accommodation. Between 2005 and 2010, the number of tourist days accounted for by non-serviced accommodation has grown while days spent in serviced accommodation have declined.
- July and August are seen to be the busiest and most valuable months. One half of the value of tourism is generated between June and September while the six months from October to March generate less than 30% of total expenditure.

2010 UKTS figures are available for UK domestic tourism to the regions of Wales. Although the Brecon Beacons touches on three of the regions, it is most closely connected to Mid Wales.

- Mid Wales has broadly followed the pattern seen across Wales as a whole, with a rise in overnight trips in 2009, falling back in 2010 (but still exceeding 2008 trips).
- Mid Wales has seen a steady rise in spend from 2008-2010, with just a very small tail off in nights spent from 2009-10.
- Length of stay and spend per night and spend per trip in Mid Wales fell between 2008 and 2009, more or less recovering in 2010.

Visitor profile

A picture of visitors to the Brecon Beacons, and how they spend their time, can be obtained from the Brecon Beacons National Park Visitor Survey 2010-11.¹¹ Care is needed when considering these results, as respondents have been recruited by individual businesses which may lead to some bias in the sample. As a result of the methodology, just 10% of respondents were day visitors.

⁹ Based on an exercise carried out by ANPA in May 2011; largely based on STEAM data, varying between 2007 and 2009, and therefore not highly scientific

¹⁰ But this is the whole county of Pembrokeshire rather than the Pembrokeshire Coast National Park

¹¹ Conducted online by Lynn Jones Research, using Visitrac, with the support of Brecon Beacons Tourism

- The market is almost entirely domestic. Over three quarters (78%) of visitors come from England, with strong representation from London and the South East (45%) and, increasingly, the South West, of England (25%). The West Midlands accounts for just 9% of visitors.
- 7% of visitors are from overseas, of whom almost one third (32%) came from the Netherlands; in 2010, the Netherlands accounted for just 8% of overseas visits to Wales¹².
- Self-catering accounted for 40% of accommodation used by staying visitors, followed by camping (30%).
- The average length of stay was 4.21 nights, with over half (53%) of visitors staying 1-3 nights, and over one quarter (27%) staying 7 nights or more. This compares favourably with an average length of stay for Wales as a whole of 3.78 nights¹³.
- Couples accounted for 59% of parties.
- Over one quarter (27%) of parties were travelling with children; the average number of children is 2.78.
- Almost two out of five (39%) of visitors were visiting the Brecon Beacons for the first time.
- Almost two thirds of all visitors (63%) are eating and drinking out as part of their visit.
- Most visitors are undertaking quite casual activities. 60% visited towns and villages, while 46% visited an attraction.
- Walking is the most prevalent activity, with 56% in hillwalking/hiking and 67% of visitors having taken part in low level walking/rambling. Birdwatching was the third most frequent activity, mentioned by 20% of visitors.
- Visitors participated in a good mix of other activities. Cycling (8%) was the next most common, followed by fishing (6%), climbing (5%), horse riding/pony trekking (5%), mountain biking (5%) and canoeing (4%).
- The most frequently visited attraction was the National Park Visitor Centre; 39% of visitors went there. The two next most popular attractions were the Monmouthshire and Brecon Canal (30%) and Brecon Cathedral (20%).
- Brecon TIC was the most frequently used amongst TICs, visited by 55% of those who used a TIC (53%).

Due to the methodology used, these figures give no real indication of the importance of visits made by groups of young people to the National Park, for example through school trips or Duke of Edinburgh award expeditions. The quality of their experience can often lead them to return with their families after a visit.

Visitor response to the Brecon Beacons

The visitor survey also gives an insight into visitors' degree of satisfaction with their experience and likelihood of returning, and their views about the Brecon Beacons and its offer.

Visitors were asked why they had chosen to come to the Brecon Beacons. The scenery and landscape was the reason most frequently given, mentioned by 92% of visitors, followed by peace and quiet (66%). 44% of visitors considered the Brecon Beacons quick and easy to get to, and 42% said that their decision to come was influenced by the fact that it is a National Park. Having plenty of things to do was quite low as a reason to come, given by just 30% of visitors.

¹² International Passenger Survey, ONS, 2010

¹³ United Kingdom Tourism Survey, 2010

Visitors were asked to rate their visit for quality, customer service and as an overall experience.

Accommodation was rated top for quality, scoring 8.64 out of a possible 10. This was followed by Tourist Information Centres, then visitor attractions, both of which scored over 8. Restaurants and cafés were next, followed by shops and finally pubs. The order was very similar for customer service, except that the position of Tourist Information Centres and visitor attractions was reversed, visitor attractions being judged to offer slightly better customer service.

Ratings for the overall experience were positive, with all factors scoring above 8. Encouragingly, 'likelihood to recommend' scored the most highly, at 9.17, while the overall visit scored 8.96. The top scoring individual factor was safety, followed by friendly and welcoming, value for money and cleanliness.

These findings have been summarised as:¹⁴

- Overall strengths were judged to be the natural environment, the people, the atmosphere.
- Weaknesses identified included accessibility, retail and catering offerings and information provision.

2.6 Enterprise needs and aspirations

Early in 2011, enterprises supplying a range of services to visitors throughout the Brecon Beacons postcode area shown in Appendix Two were invited to complete an online survey. 165 completed responses were received, including some whose business involved more than one tourism enterprise. A good range of enterprises were represented, including both accommodation and non-accommodation providers. One third (33%) of respondents provided self-catering accommodation and just under one third (31%) offered bed and breakfast or guesthouse accommodation. Other sectors which were well represented included food and drink businesses (19%) and activity operators (19%). The following picture is based on analysis of the results of the online survey.

Economic performance and outlook

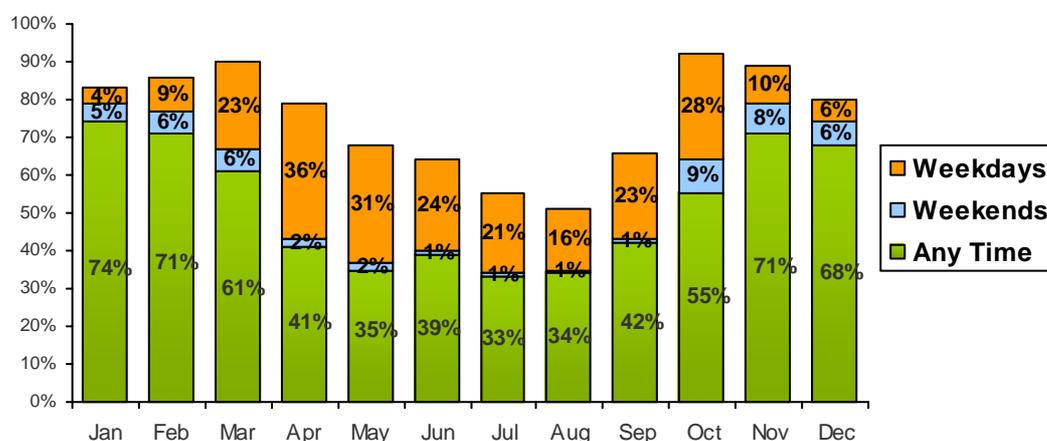
Tourism businesses have been facing some challenging times. Barely more than one third (35%) of respondents to the enterprise survey said that business had grown over the last three years, a further third (32%) said that it had stayed about the same. Almost three quarters of enterprises have a clear need for more business in the future, with more than one third (36%) seeing this as essential for viability and a further third (35%) needing it to achieve a reasonable profit.

Figure 1 shows the months when tourism enterprises are seeking more business, with an indication of whether this would be welcome at any time, on weekdays or at weekends.

The greatest need is for more visitors outside the main summer season; but even in July and August one half of all enterprises are seeking more business, including one third who would welcome more business at any time of the week.

¹⁴ Brecon Beacons Visitor Survey 2010-11, Presentation of final results 28 June 2011, Lynn Jones Research

Fig 1 Times when more business is desired (weekdays/weekends/any time)



There is least desire for specific additional weekend business in the summer, when weekday business would be especially welcome. From October to March, the need for more business is high, with over 90% of all businesses seeking more businesses in March and October. The complex picture demonstrates the need for carefully tailored product offers and targeted marketing in order to make best use of the capacity available.

Barriers and influence on business

Increasing operating costs are seen as the greatest barrier to growth; 60% of businesses reported this factor to be 'very important' or 'important'.

Three factors are seen as roughly equivalent in importance as barriers to growth: two out of five businesses felt insufficient market, lack of capital and regulations to be 'very important' or 'important'.

The remaining two barriers to growth are relatively less important. Planning restrictions are seen as 'very important' or 'important' by one third of businesses, while less than one quarter of businesses see staff recruitment as 'very important' or 'important'.

Priorities seen for the destination

The enterprise survey asked tourism businesses to score a whole range of ways in which the Brecon Beacons might be managed and promoted for economic and environmentally sustainable tourism, first for the current performance of the Brecon Beacons as a destination, and second as an indication of the importance to the success of tourism in the area.

A selection of the more important results is shown in Appendix One.

The aspect thought by businesses to perform the best for the Brecon Beacons as a tourism destination was 'Conserving the area's landscape and wildlife', demonstrating a strong recognition of the importance to the tourism industry of the National Park's First Purpose. This was followed by 'Identification of walking routes/trails'. Another area where the Brecon Beacons was thought to perform well was 'Interpretation of the area's natural heritage/wildlife'. Both these aspects relate to the National Park's Second Purpose.

Although there is some overlap with the set of actions that enterprises felt to be most important for the success of tourism in the area, there are also significant differences. One important overlap is 'Conserving the area's landscape and wildlife', which was identified as the fourth most important activity, and the area where the Brecon Beacons was felt to perform most strongly. The remaining three of the top four most important actions relate to promotion: 'Attracting visitors to the area in general', 'Attracting visitors at less busy times of year' and the 'Destination website for Brecon Beacons'. The two actions with the next highest scores relate to the provision of information, pre- and post-arrival.

Further analysis of the full list of actions enables the identification of the performance gap, the lag between the importance ascribed to an action and the perception of how well it currently performs in the destination.

Actions where the gap is greatest at the moment, and therefore seen by tourism businesses as a high priority, include: attracting visitors at less busy times of year; attracting visitors at less busy times of the week; providing basic visitors services (eg car parking/toilets), signposting, and managing promotional campaigns for the area.

Enterprises were also invited to suggest what they saw as the two greatest challenges and opportunities for sustainable tourism in Brecon Beacons. Many of the thoughts put forward were also supported by evidence from face to face consultation.

The main challenges identified include:

- Rising costs, especially fuel, combined with less spending power - a need to keep prices affordable
- Lack of co-ordination between the key players - need for better communication – too much duplication, too confusing
- Low awareness of the area – competition from other (better known) national parks
- Seasonality and length of stay – a need to achieve business growth outside the main season or mid-week, in order to increase occupancy - more people at the right time and retain them for longer once they are here.
- Maintaining an attractive environment – in the countryside and in towns and villages.
- Limitations of public transport – mixed views on improving access to the Brecon Beacons; and managing movement around the destination through increasing the availability and appeal of alternative means of travel to the car (public transport, walking, cycling, waterways)

The main product and market opportunities identified include:

- Fantastic scenery – although a feeling that its variety is not yet well known
- Easy access, especially from South East England
- Outdoor activities of all kinds – for general and niche markets, combined with a growing awareness of health benefits and general wellbeing.
- Making more of local produce, arts and culture

- Making more of festivals and events
- Staycation – the current profile and rise in take-up of UK holidays by the domestic market.
- Potential for packaging, including ‘days out’
- Promotional offers and targeted pricing

2.7 Some key strategic choices for the Brecon Beacons

A stakeholder workshop was scheduled for a midway point in the process of developing the new sustainable tourism strategy. Having considered the evidence previously made available and also having reviewed the aspirations and concerns of those whose views had been sought, individually or collectively, at the time, it was decided that the workshop would focus on four key questions in relation to the Sustainable Tourism Strategy, as follows:

- How environmentally sustainable do you want the tourism offer of the Brecon Beacons to be?
- What level of future growth in visitors is desirable in the Brecon Beacons?
- To what extent should the tourism product and market be focused around outdoor activities or on more passive forms of tourism?
- To what extent can local communities take responsibility for developing and managing tourism in the Brecon Beacons?

No clear view had been emerging about the balance of opinion on these four fundamental issues, and the workshop provided an important opportunity for further discussion and to invite a clear steer on how to position the strategy. The range of interests represented at the workshop enabled a broad and thorough discussion to take place. An attendance list is attached as Appendix Three.

A similar approach was adopted for each question. Following a short presentation of evidence in relation to each topic, attendees were invited to discuss the question in groups and then, as individuals, to indicate their position on the question in two ways: 1) using a visible scoring system provided for each table and 2) completing an individual score sheet.

The collective record was used to obtain, and feedback to the whole meeting, a quick idea of the feeling the room, but the following picture is based on subsequent analysis of the position indicated by individuals¹⁵.

Key questions	Score = 0	Score = 5	Score = 10	Average score	Maximum indicated	Minimum indicated	Average deviation
How environmentally sustainable do you want the tourism offer of the Brecon Beacons to be?	Less emphasis on green	As now	More emphasis on green	7.42	10	5	0.71
What level of future growth in visitors is desirable in the Brecon Beacons?	Less growth	As now	More growth	6.96	10	5	0.7

¹⁵ Based on score sheets provided by 43 individuals.

To what extent should the tourism product and market be focused around outdoor activities or on more passive forms of tourism?	More passive	As now	More active	5.01	8	2	1.48
To what extent can local communities take responsibility for developing and managing tourism in the Brecon Beacons?	Less responsibility on communities	As now	More responsibility on communities	6.38	9	2	1.31

Based on these scores, and on a review of records kept of points made in support of particular positions and subsequent feedback and general discussion, the following conclusions can be drawn.

How environmentally sustainable do you want the tourism offer of the Brecon Beacons to be?

This was frequently given as people's top score – over one half of individuals gave their highest score to this issue. The scores awarded support a position where *there is an increased emphasis placed on the environment as part of the tourism offer and further care is taken to limit any impact on the environment.*

What level of future growth in visitors is desirable in the Brecon Beacons?

Twelve people gave this as their highest score, with a small minority giving their lowest score. The scores awarded support a position where *modest growth in tourism is seen as desirable.* In discussion, support was expressed in particular for growth in value, through converting day visits to overnight stays, increasing visitor spend and extending length of stay.

To what extent should the tourism product and market be focused around outdoor activities or on more passive forms of tourism?

This was most frequently the lowest score that people gave; 24 people gave it their lowest score. The scores awarded support a position where *increased attention is given to more passive or gentler forms of tourism, while maintaining but not necessarily increasing current levels of more active tourism.*

To what extent can local communities take responsibility for developing and managing tourism in the Brecon Beacons?

There was some discussion over the wording of this question, challenging the notion of 'taking responsibility'. In the event, different people interpreted the question rather differently, with the notion of 'involvement with' or 'engagement in' attracting wider support. Opinion was most divided about this question, with some arguing that it was

essential that communities took more responsibility for developing and managing tourism while other taking the view that tourism was best handled by the private sector or through public sector support at a destination level. There was general support for the view that any activity at a community level *must be well integrated with, and support, a general approach across the destination as a whole.*

Subsequent development of the strategy were underpinned by the findings of this workshop.

2.8 Progress since 2007

The previous tourism strategy, prepared in 2006 and adopted by the Brecon Beacons National Park Authority in 2007, set out a vision for tourism in the Brecon Beacons in 2020 as follows:

By 2020 the area will be an exemplar of sustainable tourism in protected areas, building on:

- *a strong sense of place,*
- *the indigenous natural and cultural heritage of the Brecon Beacons and*
- *a reputation for quality built upon communities, public sector and business interests working closely together to exceed the expectations of visitors.*

Significant progress has been made towards achieving some of the aspirations in this vision, including:

- Evolution of the Brecon Beacons Strategic Tourism Partnership into a Sustainable Tourism Partnership, strengthening opportunities for partnership working and development and co-ordination of work programmes.
- Emergence of Brecon Beacons Tourism as a fully established and highly regarded trade body representing over 200 private sector members.
- Formal recognition by Visit Wales of the Brecon Beacons as a destination, with associated funding for a programme of destination management, including a partnership based marketing programme.
- Establishment of a Brecon Beacons Marketing Co-ordination Group and preparation of a 3-year marketing strategy.
- Annual STEAM figures commissioned for the National Park and the Geopark
- Introduction of COLLABOR8 (Interreg IVB North West Europe) programme, providing resources and dedicated staff in support of destination development.
- 14 clusters of businesses involved in the development of tourism in the Brecon Beacons, based on sustainability, sense of place/cultural identity and quality.
- Sustainable Tourism Action Plans prepared for nine place-based business clusters, providing basis for subsequent practical activity.
- Development of a network of orientation and information signage and map boards.
- Production of a series of downloadable audio trails.
- Delivery of many interpretative projects by the NPA in connection with the Geopark
- Development of Sense of Place material
- 60+ Brecon Beacons National Park Ambassadors recruited and trained.

- Green Tourism Business Scheme introduced; 20+ businesses, 6 Gold award winners, included in BBNP *Greener Holidays* publication.
- Establishment of a 3-year Visitor Transport Initiative and a dedicated website for travel to and around the National Park
- Launch and subsequent growth and development of South Wales Outdoor Activity Providers Group
- Development and adoption of a Concordat between the South Wales Outdoor Activity Providers Group and Forestry Commission Wales in relation to access to and use of the Waterfalls Area
- Preparation of a Brecon Beacons Cycling and Mountain Biking Strategy, as a basis for subsequent activity
- Waterfalls Centre established at Pontneddfechan, Geopark displays in National Park Visitor Centre and Black Mountain Centre, and launch of annual Geopark Festival
- Major refurbishment by FCW of Garwnant Visitor Centre
- Feasibility study for refurbishment or replacement of the National Park Visitor Centre
- Development of the Forgotten Landscapes Partnership to continue the conservation and presentation of the Blaenavon Industrial Landscape World Heritage Site
- Introduction of Routes and Roots Festival to celebrate past and future of Monmouthshire and Brecon Canal
- Establishment of BBNPA Remote Areas Working Group
- Establishment of a continuous on-line visitor survey
- First steps in defining brand values for the Brecon Beacons
- Support for tourism businesses maintained through regular communication, training opportunities and an annual 'Tourism in Action' conference
- Development and adoption of a set of sustainable tourism indicators

2.9 External influences on the market and product

It is important for the tourism strategy to look externally at a range of factors that are influencing the market and potential response from destinations. These are summarised below.

Recession and domestic holidaymaking

The economic recession and public sector cuts will have an effect on the supply and demand of tourism over a number of years. On the supply side, expected restraint in public sector spending on infrastructure, marketing and business support suggests a need to strengthen further engagement by the private and voluntary sectors. On the demand side, there are signs that people are resisting losing their holidays but rather are changing their travel patterns, providing opportunities for the domestic market. Domestic tourism trips to Wales experienced an uplift of 5% in 2009. The increase was not sustained into 2010, but the number of trips still exceeded those in 2008. Domestic tourism nights in 2010 maintained their 2009 level, and there was a growth in spend of 3%. Average spend per night has been more or less static over the past three years, but there has been a small increase in length of stay, especially in mid-Wales.

Population dynamics

The UK population is growing slowly but becoming older. Empty nesters of the baby boom era have been brought up to travel and will be reluctant to give this up, but may have to work longer to fund their retirement and have more limited discretionary

spending power. At the other end of the spectrum, there is some evidence that younger (18-34 yr olds) in particular have been switching to domestic holidays.

The search for activities and experiences

Attitudes towards holiday taking are changing and consumers are wanting to get more value out their leisure time and pack more in. There is a trend to being more adventurous on holiday, seeking and trying out new activities, including different outdoor sports as well as walking and cycling. Some people are looking for experiences tailor-made to their own interests, even within the same family group.

Green and ethical influences

There has been a rise in the ethically motivated consumer and an increased interest in environmental issues. People want to feel good about their choices. In only a small minority of cases is environmentally and socially responsible travel dictating holiday choice, but for many it is now an additional factor taken into account once other needs are met. Research amongst the UK domestic market by VisitEngland in 2010¹⁶ found the majority of consumers to be happy to accept functional sustainable elements as part of their holiday, such as re-using towels or accepting a room with a shower. Over half would choose accommodation with a green award. More directly, there is a notable increase in positive interest in wildlife, partly stimulated by media coverage.

Local distinctiveness

In the face of globalisation and concentration, visitors are likely to become more attracted by destinations that can demonstrate their differences and special qualities and which offer visitors the opportunity to experience them. Again, research by VisitEngland¹⁷ found that over half of consumers would choose accommodation supplying local food. On the other hand, brands are becoming increasingly important, conveying messages quickly and providing reassurance and familiarity in an era of seemingly limitless choice, suggesting an opportunity for a brand which conveys locally distinctive values.

The evolving internet

The internet now dominates holiday choice and information delivery. The growth of Web 2.0 technology, travel networking websites and social media have important implications for customer feedback, reviews and broadening the scope of 'word of mouth' marketing.

Mobile technology

This provides a new dimension for more instant information delivery within the destination as well as ways of enhancing the visitor experience through creative interpretation applications. Lack of fast broadband and 3/4G reception can be an issue in some rural areas.

Climate change

Extremes and unpredictability of weather conditions will affect the basic conditions for tourism. This can have a positive or negative impact on different seasons, altering travel patterns and perhaps requiring some changes in the visitor facilities and services that are provided. The effect of mitigation policies and measures, including meeting national carbon reduction targets, will also influence supply and demand.

Barriers to travel

¹⁶ Sustainability – Consumer Research, Summary of Findings, VisitEngland, 2010

¹⁷ *ibid*

Traffic congestion will get worse which may result in an increase in travel costs through plans for road pricing and other initiatives. The real environmental cost of flying may lead to further rises in fares and taxes which will affect both inbound and outbound tourism. As an antidote to this, 'slow travel' by public transport, on foot or by bike or horse may become an attractive proposition in its own right. Research by VisitEngland¹⁸ found that the majority of visitors claim that they would be more likely to use public transport to travel to their destination or to travel around when on holiday if sufficient incentives were available (reduced cost/greater convenience/better information)

Competitive destinations

There is increasing competition in the UK and overseas between local destinations which have their own web presence. Those that are able to present strong brands and products, supported by partnership working between the public and private sectors, will be the most successful.

2.10 SWOT analysis

Based on the above assessment and knowledge and opinion gained from the consultation, the following summary analysis of the strengths, weaknesses, opportunities and threats for sustainable tourism in the Brecon Beacons over the coming five years should be reflected in the strategy moving forward.

<p><u>Strengths</u></p> <ul style="list-style-type: none"> • Stunning, varied landscapes • Outdoor activities • Walking routes and trails • Interpretation of natural heritage • Range of historic/cultural heritage interest • Information (notably post-arrival) • Large number of visitor centres • Relatively easy access to markets • Festivals and events • Structures for tourism enterprise, community and other stakeholder engagement • Successful partnership activity 	<p><u>Weakness</u></p> <ul style="list-style-type: none"> • Less well known than competitors • No brand established • Public transport • Visitor pressure at key locations • Fragmentation of visitor information, pre- and post-arrival • Poor impression of some towns/villages • Limited diversity of product • Hard to arrange activities on casual basis • Lack of high profile hotels • Duplication and confusion of roles
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> • WG commitment to sustainable development • 'Staycation' effect • Increasing attention of National Trust and Cadw to promotion • VisitWales recognition of destination structures • RDP funding programmes • Rural Alliances funding • Bi-centenary of M&B canal 	<p><u>Threats</u></p> <ul style="list-style-type: none"> • Pressure to limit public spending • Restructuring of public agencies • Fragmentation between communities and authorities • Increasing competition from other destinations on outdoor access (notably The Valleys) • Competition from Convergence Funding areas • Degradation of the natural and

¹⁸ ibid

<ul style="list-style-type: none">• Increasing profile of World Heritage Sites	<p>cultural resource.</p> <ul style="list-style-type: none">• Changes in access issues in relation to activity providers.• Some land managers and farmers negative about tourism• New focus on Wales Coast Path
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3 STRATEGY

This section presents the overall strategic direction for tourism in the Brecon Beacons from 2012 to 2016. It is informed closely by the analysis contained in the previous section. It has been written to be in line with the Brecon Beacons National Park Management Plan 2010-2015, the requirements of the European Charter for Sustainable Tourism in Protected Areas and the current policy context for tourism in Wales and the relevant regions.

3.1 Policy context

The international context

Category V Protected Landscapes are defined by the World Conservation Union (IUCN). A Category V Landscape is a protected area where the interaction of people and nature over time has produced an area of distinct character with significant ecological, biological, cultural and scenic value; and where safeguarding the integrity of this interaction is vital to protecting and sustaining the area and its associated nature conservation and other values. The primary objective of the designation is to protect and sustain important landscapes and the associated nature conservation and other values created by interactions with humans through traditional management practices. A specific objective, one of seven, is to provide opportunities for enjoyment, well-being and socio-economic activity through recreation and tourism.

IUCN has prepared guidance¹⁹ setting out twelve principles for Category V landscapes which should be born in mind by those responsible for their management. Details of these principles can be found in Annex 4 of the Brecon Beacons National Park Management Plan 2010-15.

The European context

The European Union's **Political Framework for Tourism in Europe** (2010) emphasises competitiveness plus sustainability of destinations. It calls for stronger images, product diversification and innovation in destinations and measures to promote sustainability and tackle seasonality. It builds on the European Commission's earlier work on sustainable tourism policy and action²⁰.

The **European Charter for Sustainable Tourism in Protected Areas** is recognised as an exemplary framework for sustainable tourism in protected area destinations.

Developed by the EUROPARC Federation, the voice of Europe's Protected Areas, the Charter has two underlying aims:

- To increase awareness of, and support for, Europe's protected areas as a fundamental part of our heritage that should be preserved for, and enjoyed by, current and future generations.

¹⁹ Phillips, A. 2002. Management Guidelines for IUCN Category V Protected Areas Landscapes/Seascapes, IUCN

²⁰ *Action for More Sustainable European Tourism*, European Commission Tourism Sustainability Group, 2007

- To improve the sustainable development and management of tourism in protected areas, which takes account of the needs of the environment, local residents, local businesses and visitors.

This strategy has been designed to meet the requirements of the Charter which is already held by the Brecon Beacons. The Charter requires that each park has:

- A stakeholder forum to guide tourism, including representatives of the Park Authority, tourism businesses, local communities and conservation interests
- A sustainable tourism strategy and five year action plan
- Actions which reflect the ten principles of the Charter.

European Charter for Sustainable Tourism in Protected Areas: 10 principles

1. To involve all those implicated by tourism in and around the protected area in its development and management.
2. To prepare and implement a sustainable tourism strategy and action plan for the protected area.
3. To protect and enhance the area's natural and cultural heritage, for and through tourism, and to protect it from excessive tourism development.
4. To provide all visitors with a high quality experience in all aspects of their visit.
5. To communicate effectively to visitors about the special qualities of the area.
6. To encourage specific tourism products which enable discovery and understanding of the area.
7. To increase knowledge of the protected area and sustainability issues amongst all those involved in tourism.
8. To ensure that tourism supports and does not reduce the quality of life of local residents.
9. To increase benefits from tourism to the local economy.
10. To monitor and influence visitor flows to reduce negative impacts.

The Charter also encourages protected areas to recognise tourism enterprises which pursue sustainability and are committed to the park's objectives and strategy.

The national context

Policies for National Parks

Like all **National Parks** in England and Wales, the Brecon Beacons National Park was designated under the 1949 National Parks and Access to the Countryside Act. Section 61 of the Environment Act 1995 updated the Parks' two statutory purposes, as follows:

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the Brecon Beacons
- To promote opportunities for the understanding and enjoyment of the special qualities of the Brecon Beacons by the public.

In meeting the two purposes, the National Park Authority is required to seek to foster the economic and social well-being of local communities within the Brecon Beacons National Park.

Although in many cases the two purposes of the National Parks are mutually supportive and share equal importance, they are underpinned by the Sandford Principle which asserts the primacy of the first purpose over the second in cases of irreconcilable conflict.

Section 62/2 of the Environment Act 1995 also places a duty on all public bodies and public utilities to have regard to the purposes of designation in carrying out their work.

A **Position Statement** issued by **National Parks of Wales** declares the three National Parks in Wales to be Champions of Sustainable Tourism, and identifies four principal factors driving the development of genuinely sustainable tourism within National Parks.

National Parks of Wales Position Statement

Principal factors driving the development of sustainable tourism within National Parks

- To reduce the loss of tranquillity, environmental erosion and pressure on the man-made infrastructure that was originally built for small populations;
- To resolve transportation problems – carbon emissions from vehicles, disturbance of damage caused by numbers of vehicles exceeding the capacity of specific locations, parking issues, charging for access or parking, lack of access by public transport in many areas;
- To reduce the negative impacts of large-scale development, including disturbance to local communities, loss of local services and the leakage of funding away from small-scale local operators
- To resolve conflicts, real or perceived, between the National Park purposes and tourism-related activities. The nature of open country and coastal tourism makes certain activities very hard to manage directly. To be sustainable, the capacity of an area to maintain an activity needs to be given suitable consideration by tourism and activity companies.

Policies for Sustainable Development and the Environment in Wales

The Government of Wales Act 2006 places the promotion of sustainable development at the heart of the work of the Welsh Assembly Government. Wales remains one of the few administrations in the world to have such a statutory duty.

The Welsh Government launched its Sustainable Development Scheme (SDS), **One Wales: One Planet** at the Hay Festival, on the edge of the Brecon Beacons National Park, on 22 May 2009. The Scheme set out a new vision of a sustainable Wales and the priority attached to sustainable development.

One Wales: One Planet – a Sustainable Development Scheme for Wales

The Vision of One Wales: One Planet is that *sustainable development will be the central organising principle of the Welsh Assembly Government.*

- Within the lifetime of a generation we want to see Wales using only its fair share of the earth's resources
- Wales has healthy, functioning ecosystems that are biologically diverse and productive and managed sustainably
- A resilient and sustainable economy for Wales that is able to develop whilst stabilising, then reducing, its use of natural resources and reducing its contribution to climate change.
- Safe, sustainable, attractive communities in which people live and work, have access to services, and enjoy good health and can play their full roles as citizens
- A fair, just and bilingual Wales, in which citizens of all ages and backgrounds are empowered to determine their own lives, shape their communities and achieve their full potential

In 2010, the Welsh Assembly Government began work on a new Natural Environment Framework (NEF). The new framework, **A Living Wales**, will focus on

managing the environment as a whole, and on the services it provides for society, rather than focusing on separate parts – an ecosystems approach. Consultation was also opened on setting up one new organisation to be responsible for the environment in Wales. The NEF will sit beneath the SDS.

Tourism policy

Visit Wales, the Welsh Government's tourism team, is located within the Department for Business, Enterprise Technology and Science and is responsible for the promotion and development of tourism in Wales. Tourism has recently been announced as one of three new priority sectors which will be supported by the Welsh Government to help the future development of the Welsh economy.

The strategic framework for tourism in Wales is set out in **Achieving Our Potential 2006-13**.

Achieving Our Potential 2006-13, Visit Wales

The vision, which is to achieve *'a customer responsive, innovative, sustainable and profitable industry which makes an increasing contribution to the economic, social, cultural and environmental well being of Wales'*, is organised around four objectives.

- To market Wales more effectively as an attractive, all year round tourism destination;
- To exceed the expectation of visitors to Wales by providing high standards and ensuring that investment in tourism is responsive to their changing needs;
- To improve professionalism and innovation by raising the profile of the industry and by enhancing skills, training and motivation within the industry;
- To embrace a sustainable approach to tourism development which benefits society, involves local communities and enhances Wales' unique environmental and cultural assets.

In 2007, Visit Wales adopted a Sustainable Tourism Framework which was subsequently referenced in One Wales: One Planet – the Sustainable Development Scheme.

Sustainable Tourism Framework, Visit Wales

'Wales is recognized internationally as a leading sustainable tourism destination that promotes local economic prosperity, supports community well being and engagement, enhances its natural environment and culture and delivers a high quality experience to visitors.'

More specific national strategies and action plans have been developed for cultural tourism, food tourism, activity tourism (including specific strategies for walking, cycling, riding, golf, watersports and adventure tourism), major events and countryside access.

Visit Wales Strategic Marketing Action Plan 2010-13 points out that since 2002 there has been a slow decline in the domestic UK market, which is by far the most important source of overnight visits to Wales, providing around 90% of all visits to Wales. Research has shown that recent visitors with first-hand experience of the tourism product in Wales are very positive about their experience while non-visitors, and those who have not visited for three or more years, have an impression of Wales that is coloured by persistent stereotypes, particularly the notion that, although Wales is endowed with plenty of natural beauty, there is little else to see and do.

Strategic Marketing Action Plan, Visit Wales

The priority for the Visit Wales marketing team is to work with partners in the public and private sectors to build a sustainable visitor economy.

During the period 2010-2013, we will aim to do so by:

- Maintaining the visitor economy's £3.5 billion annual contribution to Wales
- Improving perceptions of Wales as a tourism destination in order to create an environment of increased demand for our stakeholders in 2013 and beyond.

Rural tourism

In 2011, a report²¹ was produced on rural tourism in Wales. *“Tourism is particularly important in rural Wales, not just because of the income it generates but also because of the wider role it can play. It helps keep communities together through job creation; it allows farm diversification; and the provision of services for tourists can also be used by local people.”*

The West Wales and the Valleys region, covering 15 local authority areas, has been awarded the highest level of support known as Convergence, from the European Union for the Structural Funds programming round 2007–2013. Powys and Monmouthshire lie outside the Convergence Area. For these areas, which make up the greater part of the Brecon Beacons National Park, the Rural Development Plan (RDP) for Wales offers the major source of external funding for tourism.

The Rural Development Plan (RDP) for Wales 2007-2013 covers four areas namely: agriculture and forestry, environment and countryside, quality of life in rural areas and locally based approaches to rural development. A series of measures has been defined under four axes. The two axes most relevant to tourism development in the Brecon Beacons are:

Axis 3 – The Quality of Life in Rural Areas and Diversification of the Rural Economy.

- Measures to diversify the rural economy include:
 - Diversification into non-agricultural activities (311);
 - Support for the creation and development of micro-enterprises (312);
 - Encouragement of tourism activities (313).
- Measures to improve the quality of life in rural areas
 - Basic services for the economy and rural population (321);
 - Village renewal and development (322);
 - Conservation and upgrading of the rural heritage (323);
 - Training and information (331); and
 - Skill acquisition, animation and implementation (341).

Axis 4 - LEADER

- Local development strategies (41);
- Inter-territorial and trans-national co-operation (421); and
- Running the local action group, acquiring skills and animating the territory (431).

Transport policy

Transport is integral to tourism; it enables and drives the sector. Tourists need to reach their destinations and, once there, visit sites through efficient, safe and reliable transport networks. Unfortunately, this fundamental issue is often neglected. Reducing visitors' dependency on the car will help reduce noise, air pollution, CO2 emissions as well as reducing congestion and disruption to local people. Tourists also provide an important source of patronage for local transport services, especially in the more sparsely populated rural areas, helping to ensure their viability.

²¹ National Assembly for Wales, Rural Development Sub-Committee Inquiry into rural tourism in Wales, February 2011

The **Wales Transport Strategy**²² provides the long term framework for transport policy in Wales. It specifies strategic priorities for transport and outlines how these will contribute to outcomes in other policy areas, including tourism. Improving access to visitor attractions, green spaces and the countryside is seen as an important outcome of the strategy as is helping to achieve a more sustainable tourism industry. Delivery is detailed in the National Transport Plan²³.

Short term objectives focus on getting visitors to move around their destination by sustainable forms of transport (bus, cycling, rail, foot) by:

- Providing better information to visitors on what sustainable transport options are currently available;
- Encouraging more local services linked to visitor attractions;
- Offering incentives to visitors to use public transport;
- Simplifying ticketing arrangements including integrated ticketing for different modes of transport; and
- Travel planning for key visitors attractions.

The longer term objectives are to increase the number of visitors using public transport for the main part of their journey (i.e. to get to Wales) through continued investment in public transport infrastructure and services and improving the integration of services and information to facilitate multi modal travel.

Wales transport planning is done at a regional level with Transport Consortia set up in each region as a partnership between the constituent Local Authorities. Grant is available for jointly agreed projects. For the Brecon Beacons, TRaCC (Mid Wales), SWWITCH (South West Wales and SEWTA (SE Wales) are the relevant RTCs. All their Regional Transport Plans make reference to visitor transport and the Mid Wales Plan includes a proposal to develop a visitor transport plan for the region. It is important for the area to maintain good communications with the regions and work with them at a strategic level.

In 2009, the **Sustainable Transport and Tourism Task and Finish Group**, established under the auspices of the Sustainable Tourism Forum, produced a report whose aim was to examine ways of improving partnership working between the tourism and transport sectors in order to encourage more visitors to use sustainable forms of transport (rail, bus, cycling, walking etc) as opposed to the private motor car²⁴.

Destination management and the regions

A review of destination management and marketing within Wales²⁵ was commissioned by Visit Wales in 2008. The review provided the basis for a series of proposals for change and a preferred model for **delivering destination management and marketing** in Wales that would:

- provide a simplified structure;
- encourage a more integrated approach;
- be adaptable to local circumstances;

²² One Wales: Connecting the Nation – The Wales Transport Strategy, April 2008

²³ National Transport Plan, WG, March 2010

²⁴ Sustainable Transport and Tourism Assessment: A report by the Sustainable Transport and Tourism Task and Finish Group, November 2009

²⁵ Destination management and marketing in Wales, The Tourism Company, October 2008

- strengthen the role of local government; and
- provide a stronger role for the private sector.

Visit Wales has sought agreement on a set of core principles to describe how central and local government might better work in partnership to deliver more sustainable tourism benefits. The aim is not to impose unnecessary new structures or tiers but rather:

- To improve the quality of the visitor experience at the destination level; and
- To make declining marketing resources, used jointly, deliver more tourism spend for Wales.

The principles, which form the basis of a new Wales Tourism Partnership Framework, are listed below.

Wales Tourism Partnership Framework Principles

1. The central role in leading brand-building and national awareness campaigns for Wales and in developing effective partnership working within tourism, at all levels, aiming to ensure that the quality of the visitor experience underpins the marketing promise to improve and sustain Wales' competitive position will be undertaken by Visit Wales.
2. Destination management will present a challenge across all sectors of the destination community. The engagement of all partners at the destination level will be led by Local Authorities.
3. Destination marketing will need to be delivered alongside the arrangements for destination management in line with local needs. This may involve a clustering of local authorities to support more efficient use of resources.
4. Destination communities at the local level will comprise public/private and third sectors. The public sector will include all departments of national and local government whose roles and responsibilities impact on tourism and the destination. Visit Wales and Local Authorities will seek the assistance of the Wales Tourism Alliance and the Wales Council for Voluntary Action to ensure effective representation of those sectors within the partnership framework at the destination level.
5. To enable successful functioning of the new approach, Visit Wales will provide funding, via the Regional Tourism Partnerships to facilitate effective adoption of the national framework agreement at the destination level.
6. Better integration and coordination is needed to ensure that the new framework arrangements support opportunities for more, rather than less, funding in support of sustainable socio-economic benefits from tourism. In order to target achieving that aim, all sources of funding to support the development, management and marketing of tourism in Wales are to be identified.
7. Parties within the Wales Tourism Partnership Framework will agree the functions, roles and responsibilities expected of destination communities.

The Framework concentrates on the need for more integrated working between the two main tiers of government within Wales in the fields of destination marketing and management. This involves establishing informal destination partnerships or communities at the local level involving the public, private and third sectors to achieve a coordinated approach.

In essence, there is no prescribed structure for a destination; each area is to decide what is best for them. Visit Wales has given formal recognition to the Brecon Beacons as a destination on the basis that Brecon Beacons Tourism and the National Park Authority will act together as a destination partnership within the terms of this framework.

Tourism Partnership Mid Wales, the lead body for tourism in Mid Wales, has assumed oversight of the Partnership on behalf of Visit Wales.

The **Mid Wales Tourism** Strategy, completed in 2011, involves dealing with those issues and supporting those objectives of national and local tourism in the Region that can best be addressed at regional level, identified as:

1. Organising tourism resources in the most effective manner across the Region;
 - Creating appropriate structures
 - Marketing support
2. Providing appropriate infrastructure and high quality, sustainable, distinctive destinations, facilities and services, that will encourage more visitors to visit throughout the year, thereby encouraging growth in the visitor economy;
 - Improving the infrastructure
 - Developing the product
3. Encouraging more local people to follow and develop worthwhile careers in the tourism industry;
 - Promoting tourism careers
 - Improving human resources for tourism
4. Maximising opportunities for tourism development with and between different agencies.
 - Advocacy and brokerage
 - Research and evaluation

Capital Region Tourism (CRT) is the lead body for tourism in South East Wales. Its broad spread of partners includes Monmouthshire, as one of ten local authorities. CRT has a key role to play in the development of destinations, seeking to ensure that developments are in line with the Regional Tourism Strategy. The South East Wales Strategic Tourism Framework (2008) highlights the following areas: focused marketing, distinctive branding, higher quality, easier access, better skills, stronger partnerships and measuring success. It also identifies a set of key experiences reflecting the 'champion' product areas supported by Visit Wales. It is considered that the Brecon Beacons as a destination is able to deliver against many of these priorities, in particular:

- 'Easy' Activities
- Browsing (Food, Events, Retail, Market Towns and Villages)
- Countryside and Scenery
- Culture and Heritage.

South West Wales Tourism Strategy, *Open All Year*, was written in 2004 and remains in use today. The main strategic approach is to focus on generating more business outside the main summer season; and attract higher spending/higher value markets through:

- capitalising on the region's unique environmental and cultural strengths;
- raising product and service quality; and
- developing new marketing initiatives aimed at carefully selected target markets.

The Brecon Beacons context

The main policy document providing strategic direction for the Brecon Beacons as a protected area and member of the national park family is the **Brecon Beacons National Park Management Plan 2010-15**. It is important that the sustainable tourism strategy is in harmony with the management plan and this is a requirement of the European Charter.

The Strategic Objectives of the Brecon Beacons Management Plan are organised around the two statutory purposes and duty, as follows:

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the Brecon Beacons
- To promote opportunities for the understanding and enjoyment of the special qualities of the Brecon Beacons by the public.

In meeting these two purposes, the National Park Authority is required to seek to foster the economic and social well-being of local communities within the Brecon Beacons National Park.

Objectives which have a bearing on tourism are distributed amongst all three purposes, reflecting the strong interdependency between the visitor experience and many aspects of the management of the National Park. However, the seven primary strategic objectives relating to sustainable tourism are contained within the duty related to the economic and social well-being of local communities, as follows:

- Invest in well researched, planned and co-ordinated product development based on the natural strengths and culture of the area;
- Continue to improve the understanding of tourism trends, market behaviour and the business of tourism in and around the National Park;
- Refine the tourism organisational structure to help create a stronger partnership approach involving all key stakeholders;
- Encourage collaborative marketing activities based upon the Brecon Beacons brand;
- Enhance the National Park experience for all people, residents and visitors alike;
- Manage the impacts of tourism;
- Realise fully the tourism potential of the Monmouthshire and Brecon Canal whilst its attractive setting is conserved and enhanced.

Other sections of particular relevance to tourism are those on access, and on understanding and enjoyment, covering information, interpretation and education.

Sustainability is the first guiding principle of the Brecon Beacons Management Plan, and throughout the Plan there is a general prioritisation on addressing sustainability issues, ranging from climate change (mitigation and adaptation), biodiversity and landscape to cultural heritage and sustainable management of recreation.

Other guiding principles are community engagement; social inclusion; cohesive partnerships; integrated management and regeneration. The emphasis implied by these principles is important for the sustainable tourism strategy.

The Brecon Beacons National Park Authority is producing a new **Local Development Plan** (LDP) for the area, which was submitted for Independent Examination on 26th October 2011. Once complete, in 2012, the Local Development Plan will guide appropriate Development within the National Park Area, and will be the primary document against which applications for planning permission are assessed.

The LDP sets out a vision for the future development of the area, as follows:
The Brecon Beacons will be a place where the special qualities of the National Park are protected and enhanced for future generations. Everyone who lives, works or visits the National Park will experience a prosperous and vibrant area while the impact on the local and global environment is minimised.

The LDP Objective for Tourism (SE5) is:

To support a sustainable tourism industry that contributes to the public's enjoyment of the National Park.

There is an associated Strategic Policy for Sustainable Tourism (SP14).

The two Policy Objectives for Tourism within the Local Development Plan are:

- To ensure that tourism development meets the requirements of the National Park's Secondary Purpose;
- To ensure that tourism development does not impinge on the natural beauty, wildlife and cultural heritage of the National Park.

Specific policies relate to new buildings for tourism development (P27); non-permanent holiday accommodation (P28); new or extended sites for touring caravans, camper vans and tents (P29); new or extended outdoor activity centres (P30); and Rights of Way and Long Distance Routes (P31).

The LDP states that success in the Strategic Objective for Tourism will be characterised by:

- Growth in the Tourism Economy, aided by appropriate development of sustainable tourism facilities and attractions;
- New Tourism Development that will aid in the delivery of the National Park's Second Statutory Purpose and Duty.

A Sustainability Appraisal (SA) has been carried out which has identified a small number of uncertainties between the compatibility of LDP objective SP14 and the SA objectives on biodiversity, and on soil quality and quantity. It has also recommended that sustainable tourist transport be considered in new tourist developments.

3.2 Towards a strategy for the Brecon Beacons

At this point, attention is turned to the shaping of a sustainable tourism strategy for the Brecon Beacons, taking into account the full range of influences that have been outlined above. Development of the strategy should reflect the views emerging from the various parts of the consultation process, as well as the assessment and position analysis set out in Chapter 2. It will also need to offer a good fit with the wider policy context, at many different levels, as described in the first part of Chapter 3, including of course that pertaining to the National Park Authority.

Having considered and weighed these influences, the sustainable tourism strategy is introduced in the remaining part of Chapter 3. It is presented below by setting out the various elements, as follows:

- Underlying aims for sustainable tourism
- The principles and approach to sustainable tourism
- The target markets that have been identified for the Brecon Beacons
- Some preliminary brand concepts for the Brecon Beacons as a destination
- A vision for sustainable tourism in 2016
- A set of strategic objectives to guide tourism delivery in the Brecon Beacons over the next five years.

3.3 Underlying aims for sustainable tourism

The aims for sustainable tourism in the Brecon Beacons should take full account of the two Statutory Purposes of the National Park designation

- To conserve and enhance the natural beauty, wildlife and cultural heritage of the Brecon Beacons National Park;
- To promote opportunities for the understanding and enjoyment of the special qualities of the Park by the public.

It should also take account of the duty of the National Park Authority

- to seek to foster the economic and social wellbeing of local communities within the National Park..

Tourism can play a key role in linking these together..

The following aims for sustainable tourism in the Brecon Beacons are proposed:

- Creating and maintaining quality year round jobs, through viable enterprises.
- Protecting and enhancing the special qualities of the area (its natural and cultural heritage) and promoting understanding of them
- Enhancing quality of life and opportunities for local residents
- Providing a fulfilling, enriching experience for visitors, available to all.
- Minimising the global and local environmental impacts of visits to the Brecon Beacons.

3.4 Principles and approach

The following principles and priorities shape the strategy and should be kept closely in mind in pursuing objectives and actions.

Effective partnership

Delivery of the tourism strategy should be based on a strong partnership approach between public and private sector stakeholders as well as between the various different public sector players. The Brecon Beacons is a destination in its own right but is also of considerable importance to the surrounding areas in attracting and retaining visitors. Visitors may stay in an adjacent destination but also spend some time in the National Park. Conversely, adjacent destinations have much to offer those visitors staying in the Brecon Beacons. This synergy needs to be developed and built upon through flexible thinking and cooperative action. The Brecon Beacons is as much part of the adjacent destinations as they are part of their own.

The need and opportunity for cooperative action fits very well into the policy direction of the National Park Authority,, which is to seek to be an enabler and supporter as much as a direct provider of services. There is a need to clarify, strengthen and focus the partnership structures and to encourage and enable buy-in through good time-efficient communication.

Year round growth in value

This is a strategy for growth but in line with the capacity and needs of the area. The emphasis should be placed on increasing the value of tourism in the area, through seeking to raise:

- the percentage of visitors who stay overnight;
- the spend per head; and
- the length of stay.

A high priority is to increase the number and value of visits in less busy months and also midweek, by increasing opportunities and appeal at these times.

Social inclusion

An emphasis on increasing value and spend per head should not mean that the Brecon Beacons is seen as an exclusive area, with little appeal to people of more limited means or disadvantaged in some other way, including a cultural experience which has limited their opportunities to explore and become familiar with the countryside. Embracing social inclusion is a key theme for the National Parks in Wales. Particular opportunities for tourism to contribute to this agenda include developing a reputation for good accessibility, promoting healthy living, continuing support for public transport links and working with visiting groups to extend their appreciation of the Brecon Beacons.

Sustainability

Sustainability (environmental/social/economic) should not be seen as an 'option' but should be integral to the whole approach to tourism in the Brecon Beacons. The importance of looking after the environment and local communities should be accepted as a principle in its own right, although associated cost saving and marketing advantages from sustainability should be sought where possible. Overselling 'green' claims and messages should be avoided. The Brecon Beacons status as a National Park brings with it many opportunities, but also important responsibilities which must be embraced and accepted by all those engaged with tourism..

Geographical spread and local distinctiveness

All areas of the Brecon Beacons should be able to benefit from tourism. Tourism visits and spending should be spread to different parts of the destination while taking account of their capacity to receive more visitors. In order to encourage this spread, the individual distinctiveness of different towns, villages and landscape areas should be celebrated and promoted, bringing out their varied strengths and themes.

An integrated destination brand

All parts of the Brecon Beacons, and all tourism stakeholders, should support and benefit from a single, integrated set of brand values for the Brecon Beacons. The policy to promote spreading and bring out local distinctiveness, referred to above, should tie in with this. Separate designations, such as the Geopark status, should support the destination brand, avoiding confusion and competing messages. As well as clear links to the special qualities of the Brecon Beacons National Park Authority, brand values should sit well with the overarching brand architecture that has been developed for mid-Wales and Wales as a whole. Consistent messages and images should be identified and brought out in future marketing and product development.

Balanced market appeal

The Brecon Beacons has an established comparative advantage as an area for outdoor access and activities. This should be maintained and promoted. However, more emphasis should now be placed on strengthening the appeal of the area to wider markets seeking less challenging experiences, bringing out and strengthening the range of attractions, events, cultural activity, heritage sites and other themes. The approach should, however, still be integrated, making the most of the landscape as a backdrop and recognising that many visitors will want to combine some outdoor activity with other forms of enjoyment. Cultural experiences, including arts and crafts, will be particularly important in broadening market appeal and merit further development.

Community engagement

The Brecon Beacons has placed considerable emphasis on encouraging and supporting the engagement of local communities in welcoming and benefiting from tourists. This approach should be continued, encouraging communities to pursue

their own initiatives, but with guidelines and support and within an umbrella framework. A new emphasis should be placed on strengthening links and positive opportunities with the farming community.

3.5 Target markets

A Tourism Marketing Strategy for the Brecon Beacons was prepared for the Sustainable Tourism Partnership in 2010, in which the following target markets for the destination were identified.

Primary target markets

Priority 1:

- **Freedom seekers.** Looking for relaxation and soft activities in a scenic natural environment with good food and accommodation. Main message: “Escape and change of pace”
- **Active seniors.** Looking for the above together with broader cultural interest. Main message: “Indulgence”
- **Outdoor activists.** Specifically seeking hiking, cycling, riding, canoeing and other activities in a scenic environment. Main message: “Freedom and space”
- **Families.** Looking for active family holidays. Main message: “Plenty to do”.

The above are seen as coming primarily from London and the South East, the M4 corridor and Bristol and the South West. However, opportunities should also be sought to work on converting day visits from South Wales, including Cardiff, to overnight stays, especially amongst the family market .

Secondary target markets

Priority 2:

- **Youth Groups.** Looking for activities, personal development and bonding and field studies. Main message: “Challenging but safe”
- **Business/corporate activities.** Looking for team building etc. Main message: “Inspirational environment”

Priority 3:

- **Independent overseas tourers.** Looking for scenic beauty, soft activities and culture. Main message: “Scenically beautiful and culturally interesting”
- **Other special interest.** Looking for specific themes, e.g. conservation, geology etc. Main message: geared to the particular interest
- **Day visitors (general).** From South Wales primarily. Looking for the ‘National Park’ and individual attractions. Main message: “The Brecon Beacons is your back garden”
- **Day visitors (outdoor).** From South Wales and the Bristol area. Looking for undertaking regular activities. Main message: “Indulge your passion close to home”
- Also identified: Fishing and Family and Friends markets

In taking on board the findings of the Tourism Marketing Strategy, this strategy recognises all of the above markets. However, in order to gain more value from visitors and to increase the proportion of overnight as against day trips, it places a clear focus on the four primary markets identified above.

3.6 Brand concepts

Developing a set of brand values for the Brecon Beacons is an ongoing process. Some initial work has been carried out which has begun to identify brand values and relate these to concepts. There will be a need to give further consideration as to how these can incorporate the main interpretative themes that have been identified by the National Park. An early action from this strategy will be to undertake further consultation on the brand and to distil the outcome of this into a set of clear statements leading to guidance on messages and images that portray the brand.

The work to date on concepts has built on the consultation for this strategy, the identified strengths and weaknesses and the target markets outlined above. This has pointed to the importance of inspiring yet accessible landscapes; individual locations with their own character; and rural life and people, as the basis of the appeal of the Brecon Beacons.

3.7 Vision

Although the vision set out in 2007 remains relevant looking forward over the next five years, it is perhaps over-focussed on *process* and on perceptions of the Brecon Beacons as a leading *example* of a destination, rather than on *outcomes*, including business performance and the visitor experience. Clearly, both process and outcomes are important, and it is the task of this strategy to achieve the right balance between the two. This has been a recurring theme during the consultation process, which is reflected in a new vision for this strategy, as follows:

In 2016, the Brecon Beacons is well established and recognised as a leading rural destination for sustainable tourism in the UK, receiving appropriate levels of business year round. Visitors appreciate the high quality, well maintained and varied landscapes as well as the cultural and historic heritage of the area, which in turn benefit from tourism. The National Park Authority, their public sector partners, tourism businesses, local communities and other interests work effectively together to ensure the ongoing success and quality of the visitor experience and of the destination as a whole.

3.8 Strategic objectives

The analysis presented in the previous chapter, together with the context, principles and vision outlined above, has led to the identification of the follow six strategic objectives to guide tourism delivery in the Brecon Beacons over the next five years.

1 EFFECTIVE MARKETING

To raise awareness of the Brecon Beacons as a leading destination for quality rural experiences, generating overnight visits throughout the year

Relates to European Charter principles: 5, 9

2 COORDINATED INFORMATION AND INTERPRETATION

To ensure that all visitors have access to accurate information and interpretation that strengthens appreciation, enjoyment and understanding of the Brecon Beacons and stimulates curiosity and a desire to explore, stay longer and return

Relates to European Charter principles: 4, 5, 7

3 ENVIRONMENTAL RESPONSIBILITY

To encourage and promote responsible use of the environment by visitors and tourism stakeholders and establish ways for them to support the management and conservation of the Brecon Beacons

Relates to European Charter principles: 3, 8, 10

4 PRODUCT DIVERSITY

To provide a rich diversity of visitor experiences in line with potential market interests and opportunities and with Brecon Beacons brand values

Relates to European Charter principles: 4, 5, 6, 9

5 COMMUNITIES AND PLACE MAKING

To work with local communities to strengthen the individual distinctiveness of the towns, villages and rural areas in the Brecon Beacons and their appeal and amenities for visitors and local residents

Relates to European Charter principles: 4, 5, 8

6 SUPPORTING BUSINESSES

To encourage and assist tourism-related enterprises to improve their quality and performance, undertake appropriate investments and work together to ensure the success of the Brecon Beacons as a sustainable tourism destination

Relates to European Charter principles: 4, 9

4 ACTION

This section takes the six strategic objectives and identifies areas for action under each of them.

1 Effective marketing

To raise awareness of the Brecon Beacons as a leading destination for quality rural experiences, generating overnight visits throughout the year

Effective marketing of the Brecon Beacons is critical to the achievement of this strategy. It is clearly important in ensuring the successful contribution of tourism to sustainable development and to securing the viability and profitability of enterprises. However, it also plays a central role in the achievement of wider strategic objectives. In this respect, the execution of marketing should pay particular attention to the strategic principles of:

- Addressing seasonality – ensuring that content and messages major on reasons to come to the area, and particularly to stay overnight, in less busy months and midweek.
- Delivering sustainability – projecting positive messages about the quality of the environment, supporting conservation and relating to communities.
- Being socially inclusive – putting across a strong sense of welcome and promoting opportunities for all.

The marketing content of this strategy and action plan reflects the Tourism Marketing Strategy for the Brecon Beacons, 2010, which in turn stressed that partnership working was the ‘fundamental basis for its success’. Effective coordination and mutual trust between public and private sector partners is critical in delivering timely and effective marketing. This can be achieved through the Brecon Beacons Marketing Coordination Group, as a component of the Sustainable Tourism Partnership. Further details on this delivery structure are provided in Section 5.1.

► 1.1 *Strengthen understanding of target market profiles and perceptions*

The marketing programme should be based on a clear understanding of who is currently coming to the Brecon Beacons, their profile, initial perceptions, motivations, actions and experiences. While this can serve as a good guide for shaping future approaches and messages, it should be augmented where possible by research-based knowledge of awareness, perceptions and potential interest of non-visitors. Specific actions include:

- Maintaining an annual visitor survey with questions covering the above. The on-line survey run by BBT has become established and should be further strengthened by increasing promotion by a spread of enterprises well representative of different areas and types of tourism. Face to face visitor surveys may be run from time to time to augment and validate the findings.
- Seeking and recording regular feedback from enterprises about their visitors.

- Ensuring that Brecon Beacons is included in any comparative perception studies of Wales and its destinations or of UK national parks, and considering possible future qualitative market research specifically on the Brecon Beacons.

► **1.2 Establish and disseminate the Brecon Beacons brand values**

Adherence to an agreed set of Brecon Beacons brand values will provide the basis for ensuring that marketing messages and activity are mutually reinforcing on behalf of the destination. The brand values in turn need to reflect the strategic principles of this strategy, as well as the priorities and interpretive themes identified by the National Park Authority. Partner local authorities recognise the true value of the Brecon Beacons brand to their own destinations and have a key role to play in its dissemination; its use by them should be encouraged and supported. It will be important to maintain a good fit with the all-Wales and regional brands, and to keep abreast of brand development activity on the part of neighbouring destinations, assimilating this wherever possible. Relevant actions include:

- Completing work on identifying and agreeing the brand values of the Brecon Beacons
- Translating these brand values into indicative deliverable messages, images, text and supportive actions
- Disseminating the above to partner destinations and other tourism stakeholders, including businesses and local communities, with guidance on their use.
- Continuing to explore means of conveying the sustainability message in an exciting and customer focused way as a mainstream part of the brand
- Using branding and marketing messages to influence visitor behaviour in line with the Visitor Management Plan and other National Park Management Plan objectives

The brand values will be made manifest in actions, product, images and words rather than relying on logos and straplines. However, in order to facilitate association with the brand a visual identity for the Brecon Beacons as a destination should be agreed, through a graphic device and design style. It is not intended that the logo of the Brecon Beacons National Park Authority – the burning torch – should change and this will continue to be used on specific BBNPA material. Further consideration is needed on the extent to which any destination logo should resonate with the torch.

► **1.3 Establish and maintain a high quality web presence for the destination**

A single highly effective website for the Brecon Beacons should be the cornerstone of the marketing programme. This should combine visitor facing information about the national park with that for tourism enterprises, other stakeholders and the communities within and surrounding the park, within a thematic framework. Required action includes:

- Completing the design and content of the new single destination website
- Establishing an efficient process for data capture and maintenance
- Providing simple site navigation, search facilities, access to booking systems and appropriate customer generated content
- Ensuring a high profile presence for the site on the web, through search engine optimisation, linkages, integration with social media, etc.

An increasingly important opportunity for maximising Brecon Beacons web presence is to provide content on the destination and promote its use by others on their websites, including in particular those of partner destinations and commercial operators in the area.

► **1.4 Maintain a creative PR, communications and social media programme**

The Marketing Strategy places emphasis on communication processes for generating awareness, interest and enquiries. While these can be particularly cost effective, the strategy underlined that they require a strong commitment of human resources as it is essential that releases and feeds do not dry up and that the destination is seen to be fresh and alive. It is also imperative that procedures are agreed that enable swift reaction to media opportunities. Action requires:

- Maintaining a PR capacity to identify, shape and transmit stories to the media
- Giving people reasons to visit the Brecon Beacons, developing products which will attract niche and special interest markets.
- Proactively creating angles, events and news items
- Facilitating media visits
- Maintaining a current Facebook page for the destination
- Encouraging a range of active Twitter feeds conveying up to date happenings in the Brecon Beacons
- Keeping abreast of changes in digital technologies and opportunities over the five year period.

► **1.5 Focus on seasonal and off-peak images, themes and offers**

The importance of generating more year-round visits to the Brecon Beacons and achieving more mid-week business has been emphasised throughout this strategy. This needs to be reflected in all aspects of the marketing programme but can be more specifically addressed in a number of ways, including:

- Drawing on all of the seasons for colours and images presented on the website and other communications
- Encouraging and promoting special offers based on price and value-added packaging
- Encouraging and promoting extended opening of attractions
- Making the most of seasonal and off-peak events, adding new event to the programme if thought to be beneficial.
- Projecting positive experiences of all seasons – autumn colours, snow, seasonal foods, wildlife abundances, the farming year, blustery walks, winter fires, etc., and encouraging partners, especially individual enterprises, to do the same.
- Targeting product and messages at markets more able to travel off-season and mid week.
- Promoting offers and experiences that extend the weekend from Thursday to Monday.

► **1.6 Ensure full synergy with Visit Wales and partner marketing programmes**

This strategy and action plan recognises the current framework for tourism marketing, with Visit Wales being responsible for increasing awareness and

consideration of Wales and destinations being responsible for conversion, the visitor experience and stimulating repeat visits and advocacy. Maximum exposure and benefit for the Brecon Beacons and its products should be sought from the awareness-raising work of Visit Wales and, collaboratively, from the conversion work of overlapping and surrounding destinations. Actions include:

- Promoting national and international use of Brecon Beacons imagery as an iconic place in Wales
- Feeding stories and products to be used by Visit Wales in their media and e-marketing activity
- Ensuring strong and accurate coverage of the Brecon Beacons within destination marketing material and campaigns for marketing areas that contain parts of the National Park - currently Mid Wales and the Brecon Beacons, Monmouthshire, Carmarthenshire and The Valleys.
- Pursuing appropriate cross-border opportunities with Herefordshire.
- Providing mutual incentives for enterprises to gain exposure in complementary destination material and campaigns.

► **1.7 Make positive use of designations, without confusing the brand**

The Brecon Beacons, or specific parts of it, have been recognised through a number of significant designations. These strengthen the environmental values of the destination and provide opportunities for raising the profile of the area; they should be used sensitively in support of the brand. The approach should involve:

- Maximising use of the longstanding and familiar designation as a National Park as being integral to the brand. This designation is recognised by enterprises as important in generating business.
- Using the Geopark designation of a large part of the park not as a descriptor of that area nor as a brand (which could be confusing or competitive) but rather, where relevant, to underline the unique quality of the landscape and geology and highlight related visitor products and experiences.
- Maximising on the international recognition of the UNESCO World Heritage Site designation of Blaenavon to generate interest in this site and more generally to raise the heritage profile of the Brecon Beacons.
- Making appropriate use of the EUROPARC Charter award to underline the commitment to partnership working and sustainable tourism
- Considering applications for additional designations which reinforce key messages, for example Dark Skies Status.

► **1.8 Obtain exposure for the Brecon Beacons at major generative events**

A strength of the area is the presence of some well established and high profile events which generate visits in their own right. They provide a particular opportunity to stimulate interest, spending and repeat visits in the Brecon Beacons. Examples include the Hay Festival, Abergavenny Food Festival, Green Man and Brecon Jazz. Action should include:

- Securing content about the Brecon Beacons, with links to information, on the events' websites and publicity material, supported by joint media activity.
- Encouraging the inclusion of programme items that reflect the Brecon Beacons.
- Having a strong visible presence at the events and providing information there.

2 Coordinated information and interpretation

To ensure that all visitors have access to accurate information and interpretation that strengthens appreciation and understanding of the Brecon Beacons and stimulates curiosity and a desire to explore, stay longer and return

Provision of information and interpretative messages play a very important role in influencing visitor choice and behaviour before and during a visit. It is particularly critical in encouraging visits to the different parts of the area, with an associated distribution of time and money spent; in providing a rich and fulfilling experience for visitors, encouraging return visits; and in stimulating visitor interest in the special qualities of the National Park, their conservation and the impacts of their visit. Much work here has been, and will continue to be, undertaken by officers of the National Park Authority in fulfilment of the second statutory purpose and a strongly integrated approach will be essential to future success.

Tourism enterprises in the Brecon Beacons fully recognise the importance of visitor information and interpretative material, both pre and post arrival, to their performance. There is a reasonable level of satisfaction with what is currently provided but concern that this should be maintained and well linked in to overall promotion of the area.

The number of information outlets of various kinds and the amount of printed material available is considerable in the Brecon Beacons and greater than in many other rural areas. The destination is fortunate in this respect, largely due to the presence of the National Park Authority which has an education, information and interpretation team whose work relates to its remit to promote opportunities for understanding and enjoyment of the park's special qualities, and also to the additional resources available to the Geopark. Many other players and initiatives are also engaged in information provision, including the local authorities, communities and tourism enterprises within and feeding into the Brecon Beacons. At a time of pressure on resources, the emphasis in future must be on effective coordination and delivery.

Interpretation is an important part of strengthening the visitors' understanding and appreciation of the area and as such enriches the visitor experience, leading to higher levels of satisfaction, longer stays, word of mouth recommendations and repeat visits.

► **2.1 Develop and implement strategies for information and interpretation**

BBNPA is planning to prepare an information strategy and action plan for its own work in 2012. It would be valuable to extend this if practical to a Plan for the destination as a whole. This would provide a good opportunity to review the whole spectrum of visitor information provision in the area, including not only that provided by the National Park Authority but also the work of all other players. It should start by looking closely at the purpose of information delivery and embrace, and link, the educational, enjoyment, visitor management and economic interests of the National Park, the tourism industry and general community. It should consider, and relate: different market sectors and users (including local and incoming); all forms of information delivery; geographic coverage; the range of players; roles and functions; available resources and future funding. A thorough audit of information material, both in print and online, is required. It is important that gaps are identified

and that each piece has a clear role avoiding unnecessary duplication, strengthening consistency of design and approach where possible, and that its distribution, use and shelf life is optimised.

The current Brecon Beacons National Park Authority Interpretation Strategy is being reviewed to align it with priorities identified in the National Park Management Plan. It aims to encourage co-operation between public, private and community partners engaged in interpreting the National Park, to provide a seamless, high quality and sustainable visitor experience regardless of site ownership and/or interpretative provider.

► **2.2 Consolidate the Information Centre network, strengthening stakeholder engagement and support**

There are at least eleven dedicated (Tourist) Information Centres in and around the Brecon Beacons with a specific function of providing information to visitors. Four of these come under the BBNPA (two of them currently with additional local authority support) and seven are either local authority or community based. This is a time of change in thinking at a national level about the role of manned TICs, owing to the advent of electronic information media and pressure on public funding. The position of all the information centres in the Brecon Beacons area needs to be considered carefully in the light of the information strategy (see 2.1) and the TIC study to be completed by Visit Wales.

The approach should be to seek to consolidate a network of effective centres that have the knowledge, skills and material available to deliver good quality information about the Brecon Beacons while also supporting and being supported by their local communities and businesses and their own trading activities. Action to achieve this includes:

- Establishing and maintaining a TIC Coordination Group to share knowledge and ideas, streamlining information collecting and delivery, promoting awareness of the TICs and their contribution, and tying them into the wider work on sustainable tourism in the area.
- Providing regular training for TIC personnel, including volunteers
- Strengthening engagement with local businesses and with communities, including relating to the new Rural Alliances programme
- Linking TICs with interpretation and attractions which in part provide a reason for visitors to come to them, rather than relying on the information service itself as the draw.
- Encouraging appropriate complementary retailing of local products and sale of services to the community and visitors
- Ensuring that centres in key locations fulfil a role for the area as a whole. In particular, ensuring that the Brecon TIC meets the expectations arising from its central location.
- Maintaining the visibility of the Brecon Beacons and associated information material in each TIC.
- Linking other visitor and interpretation centres, such as those provided by the Forestry Commission, National Trust, Cadw and private operators, into the network as appropriate. The recent FC investment at Garwnant and the upcoming NT project at Pont ar Daf provide particular opportunities.

► **2.3 Pursue redevelopment of the National Park Visitor Centre**

The National Park Visitor Centre at Libanus (the Mountain Centre) remains a popular venue at the heart of the park. It has significant visitor numbers and shows up strongly in the visitor survey as a place to visit. It should continue to play a key role as a shop window for the Brecon Beacons and a primary location for the provision of information and interpretation. A feasibility study in 2010 has mapped a way forward for the redevelopment of the centre, involving support from a range of partners, and this should be pursued.

► **2.4 Expand the individual delivery of information and interpretation through the Ambassadors scheme and more widely**

The delivery of information and interpretation through word of mouth to visitors where they are, rather than requiring them to go to specific centres, is widely recognised as a highly effective way of communicating ideas and messages. This has been well pursued in the Brecon Beacons through the Ambassadors scheme which provides formal recognition to individuals who have been trained in knowledge about the area and in ways of putting this across. Action to pursue includes:

- Raising the profile of Ambassadors, especially pre-visit, so that visitors can take account of their role when selecting places to stay and visit; encouraging Ambassadors to mention interpretative themes and stories in their pre-visit information.
- Encouraging Ambassadors to make best use of their role, finding new ways to share the knowledge that they have acquired with their own and other visitors in order to enrich their experience of the Brecon Beacons;
- Extending the coverage of the Ambassadors scheme, including to people working in a range of service positions that interface with visitors and more generally in local communities.
- Making connections to the Valleys Community Tourism Ambassador programme, especially in areas of overlap such as Blaenavon and Brynaman.
- Reviewing the balance and content of training with respect to heritage and other themes relating to the emerging brand and to National Park interpretative themes, and to the priorities in this strategy.
- Encouraging and supporting rangers and wardens, whether paid, part-time or volunteers, in the provision of information to visitors.
- Considering more proactive personal delivery of information in key locations at busy times, for example through the presence of wardens and volunteers in main car parks and on popular bus journeys.

► **2.5 Seek improved broadband coverage and opportunities for further use of IT in information delivery**

New ways of providing information and interpretation through hand-held devices, based on downloadable material, the internet, GPS and mobile telephony, have emerged in recent years and will be further developed during the course of this strategy. Their application in the Brecon Beacons is currently hampered by the limited strength and speed of broadband and poor mobile phone coverage in many parts of the area. This should be addressed through:

- Actively lobbying for improved coverage of high speed broadband and mobile phone signal where compatible with landscape conservation objectives.

- Encouraging tourism businesses and information centres, including places to eat and drink, to provide access to existing audio trails and MP3 files, including the offer of free wi-fi access to their guests and customers.
- Extending the use of pre-arrival downloadable MP3 files and native phone applications.
- Developing a pre visit information/orientation mobile website or app; such an approach has been adopted by Cadw, National Trust or Snowdonia National Park.
- Future-proofing print through use of QR codes/
- Keeping abreast of technological changes and use in information and interpretation and enriching material as technology and infrastructure allows.

3 Environmental responsibility

To encourage and promote responsible use of the environment by visitors and tourism stakeholders and establish ways for them to support the management and conservation of the Brecon Beacons

This objective is about delivering on the environmental aspects of sustainability as a key principle and basis for future tourism in the Brecon Beacons. The actions build on the first statutory purpose of the Brecon Beacons National Park to conserve and enhance the natural beauty, cultural heritage and wildlife of the National Park, and on the commitment of the BBNPA to sound environmental management. They provide a framework for encouraging and assisting a practical response from tourism business and visitors.

► **3.1 Support all actions to maintain a quality environment**

It is widely recognised that the success of tourism in the Brecon Beacons is highly dependent on the quality of the landscape. People come here and return because it is a beautiful place. Enterprises responding to the survey placed ‘conserving the area’s landscape and wildlife’ in the top five activities seen as important to their businesses. This strategy therefore supports actions to conserve the area’s natural heritage and minimise adverse impacts on the environment from all forms of development and activity, including tourism amongst many others. These actions are not identified in detail here but are broadly covered in the National Park Management Plan in the section relating to the Park’s first statutory purpose – conserving and enhancing the National Park. More specifically, attention is drawn to the following specific actions that are considered especially relevant to tourism:

- Preventing unsightly new development which will damage scenic quality
- Maintaining a clean, tranquil environment and dark skies – avoiding pollution, degradation and disturbance of air, water, land, habitats and communities from discharges, solid waste, noise, light and other impacts
- Continuing land management and farming practices which maintain the landscape’s quality and distinctiveness
- Supporting restoration and conservation projects which enhance the landscape and biodiversity
- Tackling upland erosion and scarring due to various causes including visitor pressure.

► **3.2 Clarify and pursue spatial visitor management policy across the Park**

Consultation on the strategy revealed a strong body of opinion that the National Park would benefit from a visitor management plan that identified the suitability and capacity of different areas to different levels and types of visitor activity. This would have implications for tourism development, infrastructure provision, management activity, information and marketing. The BBNPA has a Remote Areas Policy which seeks to protect the special wild qualities of certain areas, notably the Mynydd Du in the west of the park but this is currently under review and may be best dealt with as part of the broader review of visitor management. Visit Wales have worked with Pembrokeshire Coast National Park to make available lessons from their experience in completing an audit of recreation activity and its management implications. It is recommended that a full Visitor Management Plan or a policy statement is prepared for the Brecon Beacons National Park. This should involve:

- Considering the different landscape character across the park, current visitor flows, existing infrastructure and factors affecting carrying capacity (environmental, social and psychological).
- Taking account of the visitor flows, ground conditions, availability of natural resources, including water, and habitat sensitivity at different times of the week and year; commissioning additional research where necessary.
- Clarifying the approach to the Mynydd Du area, respecting the need to avoid inappropriate promotion and over use.
- Seeking ways to gain additional benefit for the communities and enterprises in the west of the Park, appropriate to its Geopark designation and special character.
- Proposing an approach for the most visited areas (honeypots) including spreading demand from them and/or making them more robust through investment in additional infrastructure and services, and targeted interpretation.
- Identifying areas or specific sites which have visitor appeal and capacity, such as Garwnant, Craig y Nos, Blaenavon and the canal, for example.
- Exploring opportunities for developing and enhancing additional areas for well managed access and appropriate investment in infrastructure, where they can be shown to be sufficiently robust to cope with any pressure that might arise.
- Identifying locations and/or activities which are particularly sensitive and may require management agreements.
- Considering how strategies for information and interpretation can support the Visitor Management Plan by encouraging visitors to the National Park to make appropriate choices and behave responsibly. .

► **3.3 Extend access codes for specific areas and activities**

The existence of codes of good practice, including the Countryside Code and, in Wales, the recently launched Waterside Code, should go some way to dealing with many potential management issues and the attention of visitors and tourism businesses, including activity operators, should regularly be drawn to their special importance in a Protected Area. Consideration should be given to developing and promoting a visitor code for responsible behaviour in the Brecon Beacons National Park.

Irrespective of a Visitor Management Plan, there are certain activities that should be addressed through individual management processes. The Concordat between Forestry Commission Wales and the Outdoor Activity Providers Group has been very successful in addressing visitor impact issues in the waterfall country. This

area is also subject to a specific management project balancing the needs of visitors, residents and habitats. Consideration should be given to where else this kind of focussed approach could be usefully applied, such as in areas currently used for climbing, caving and watersports. Alternative and additional sites for certain activities may also be identified.

An activity of increasing concern owing to its impact on the environment and on the enjoyment of the mountains by general tourists is the holding of challenge events for sizeable groups. This needs to be addressed through codes, dialogue, pricing and regulation.

Conflicts of use between user groups should be identified, monitored and managed using codes of conduct where appropriate.

► **3.4 Ensure best possible integrated public transport services, supported by information and promotion**

Strengthening public transport provision and its use should be maintained as a high priority in the interests of reducing the carbon footprint of tourism in the area, supporting visitor management, reducing traffic congestion, providing linkages for walkers and improving accessibility for all. The current Visitor Transport Initiative has had success with a number of projects to improve information on transport options (e.g. the Car Free Days Out leaflets) and in the provision of services (e.g. Beacons Bus). The progress made should be built upon. Relevant action includes:

- Securing funding for a renewed Visitor Transport Initiative to deliver an agreed transport plan
- Continuing to support Beacons Bus and where possible to expand the service to additional days of the week or times of the year.
- Investigating commercial opportunities, including sponsorship and discounted entry arrangements for public transport users.
- Promoting more joint working between bus and rail service providers
- Maintaining good up to date transport information on websites and targeted material
- Ensuring all tourism enterprises provide clear information on public transport access options and where possible facilitate their use
- Continuing to work with events providers on promoting use of public transport
- Identifying other specific concentrations of visitors which might feed into public transport services (e.g. caravan/camping sites)
- Supporting packaging and promotion of transport experiences (e.g. Heart of Wales Line)
- Pursuing incentive pricing, including rover tickets.

► **3.5 Encourage tourism enterprises to strengthen sustainability management**

The Brecon Beacons should seek a steady increase in the number of enterprises engaged in positive actions to improve their environmental management and support conservation and the local community. This should be pursued on the basis of responsibility, public relations and cost savings as well as possible market advantage. Certification should be used as a tool that promotes a comprehensive approach, provides a benchmark and verifiable standard, and enables promotion of

good practice with confidence, but there are also other ways of encouraging positive action. The approach should include:

- Providing training for enterprises on sustainability, in general and focussing on specific themes
- Promoting access for individual enterprises to specific advice on technical issues and on communicating and gaining advantage from green initiatives and strengths
- Facilitating networking and peer support and exchange of ideas and knowledge between interested enterprises
- Encouraging and supporting take up of Green Tourism Business Scheme certification
- Raising the profile of certificated enterprises in information and publicity material.

► **3.6 Encourage visitors to contribute to the conservation and enhancement of the National Park and its environment, financially and by behavioural change**

Visitors have their own responsibility towards the destination they are enjoying. It is important to communicate with them over this, particularly once they are within the destination and post visit. Some of this is dealt with under Section 3.3 which looks to establish a series of Codes of Conduct for specific activities and so reduce environmental impact. The idea of a Visitors' Charter, involving financial donations, takes this a step further..

A Visitors' Charter has been successfully implemented in Cornwall as a communications tool to gain visitor commitment to the destination. This has been implemented in partnership with businesses and a similar model could be developed in the Brecon Beacons, potentially linked to a more active CRM process which might include visitor payback models and harder commercial information.

Opportunities should be pursued to establish a financial mechanism for tourism activity to support the conservation and management of the resource upon which it depends. In the Brecon Beacons, the priority is to generate support for the management of the uplands and access to them, but funding could also be used for conservation of other natural resources. A number of individual initiatives already exist, such as the use of proceeds from sales of MTB leaflets to support route maintenance and the use of fisheries income to support work on the River Usk ecosystem. The Brecon Beacons Park Society has expressed an interest. In principle, income should be obtained from day visitors as well as staying visitors as the former are in a large majority and are responsible for much of the impact. As a first step, a study should be undertaken of the options to pursue, which should consider:

- Creating a single environment fund for the area which could raise money from various sources, including visitors and enterprise sponsorship.
- Encouraging, supporting, networking and possibly branding a whole series of direct support and payback or gifting initiatives relating visitors to particular schemes local to the place or communities they are visiting.
- Generating income from car parking and other admission related charges which is specifically earmarked for management purposes and promoted and justified to visitors as such.

4 Product diversity

To provide a rich diversity of visitor experiences in line with potential market interests and opportunities and with Brecon Beacons brand values

Successful sustainable tourism depends on providing experiences that have a strong appeal to existing and potential visitors, and which retain loyalty to the destination through creating high levels of visitor satisfaction. The Brecon Beacons already has a strong image and reputation for walking and other outdoor activities but it is very important that the product continues to justify and sustain this in the face of strong competition from other areas. There is increasing recognition that the image and appeal of the area should be diversified in order to attract a wider market, making much more of the historical and cultural heritage and opportunities for a less physically demanding experience at all times of year. This should be strongly linked to delivery of the National Park information and interpretation services.

The action areas outlined below cover all kinds of visitor experience. In pursuing them, it is important to keep strongly in mind the target markets that have been identified. The way that products are developed and presented should consider, in particular, their appeal to active and interested couples, especially empty-nesters, but also their appeal to family markets. Different levels of experience should be catered for and the potential to meet a diverse range of interests within one group of visitors should be developed. Care should be taken to minimise, and if possible avoid, conflicts between different types of user, taking account of visitor management priorities and tools when developing new product. Products should be designed to give would-be day visitors reasons to stop overnight and to stimulate longer stays. It will be important to make people want to visit the Brecon Beacons, developing and promoting products which will attract niche and special interest markets.

Delivery will be partly by the private sector and partly by the National Park and other authorities and agencies. Communities should also be encouraged to participate. In most cases, a combination of public and private involvement, providing infrastructure, facilities, knowledge and market contact, is necessary for success.

► **4.1 Maintain high quality walking experiences and general countryside access at all levels**

Walking is by far the most important activity in the Brecon Beacons and this will continue. The appeal and response is broad – visitors seek a wide range of opportunities from short to long walks in the mountains and in other types of landscape depending on their ability and mood. Many people are simply seeking a place to park, to be outside and to enjoy good views, perhaps with opportunities to picnic and go for a short stroll. Action priorities include:

- Continuing to give high priority to route maintenance and appropriate waymarking, strengthening investment wherever possible through the application of external or additional funding.
- Ensuring that there is a portfolio of well maintained walks at all levels, supported by information that is readily accessible via the main website.

- Reviewing the provision, capacity and signing of locations for general countryside access, including viewpoints and picnic places, and seek to fill gaps where necessary.
- Encouraging more promotion of walking packages, linear and centre based, involving overnight stays based on promoted routes which will offer a reliable and rewarding experience.
- Strengthening links and promotion with public transport
- Pursuing opportunities for improving resources, products and marketing in the eastern part of the Brecon Beacons through links to the Walking with Offa initiative.

► **4.2 Provide a range of cycling experiences matched to differing markets and terrain**

Opportunities for road cycling and mountain biking experiences exist at all levels in the Brecon Beacons. Particular strengths exist in open country mountain biking opportunities. Further action is needed to gain tourism benefit through strengthening links to communities and enterprises and ensuring good, well promoted routes that meet market needs, including provision for families and less energetic cycling. The cycling tourism strategy for the area and a recent VW and FC marketing strategy for mountain biking provide a context. Relevant actions include:

- Building on the concept of cycling hub towns – expanding from the five already involved and strengthening routes, services, information etc. available there
- Adding road routes of varying length to the suite of mountain bike routes identified for each town
- Extending National Cycle Network routes into and around the Brecon Beacons
- Providing more stretches of traffic free routes – both short and long
- Extending provision of mountain bike routes in appropriate locations
- Working with mountain bike users to monitor and report on route conditions and assist with information
- Ensuring environmental and inter-user issues are monitored and managed on each route
- Providing good downloadable information on routes
- Supporting and extending the number of ‘cyclist welcome’ enterprises and the spread of cycle hire and service facilities.

► **4.3 Further establish the Brecon Beacons as the primary destination for horse riding in Wales**

Riding is a relative strength of the Brecon Beacons compared with most other rural areas and is a traditional holiday activity here. More could be made of this position. The area is well provided for with riding centres and a number of dedicated riding routes of varying length exist. However, the product could be further strengthened. Relevant action includes:

- Making some legal riding routes usable by necessary improvement to certain lengths, enabling more linkages and taking pressure off other routes
- Promoting use of existing routes for tourism, including staged riding breaks
- Encouraging more accommodation to cater for riders
- Promoting riding opportunities for novices and dabblers

- Extending visitor-facing skills and knowledge of relevant personnel, building on the training about the National Park already given to the staff of riding businesses

► **4.4 Gain more tourism benefit from the wide range of supported outdoor activities**

Outdoor activities are a major strength for the Brecon Beacons, with opportunities for climbing, caving, gorge walking, canoeing, sailing, fishing and air sports alongside walking, cycling and riding previously mentioned. The number of operators providing supported access to these pursuits is particularly strong, made more so by the now well established South Wales Outdoor Activity Providers Group (set up under the COLLABOR8 programme). The presence of many bunkhouses (supported by their cluster group) and other accommodation geared to outdoor activities but also attracting other markets, is an important associated resource. The priority is to make this strong product perform even better. Opportunities include:

- Continuing to extend the amount of access for water-based recreation as a priority; open water is a key resource which is currently under-used.
- Extending the areas of access for some activities through supporting further negotiated agreements by SWOAPG and landowners, backed up by member codes of practice.
- Providing and promote opportunities for novices and families to try a range of activities, with easy access to them on demand
- Encouraging more packaging and linkages between activity providers and accommodation, including exploring arrangements for flexible booking during a stay.
- Gaining more media coverage of the Brecon Beacons as a leading destination for accessible outdoor activities.

► **4.5 Strengthen the awareness, accessibility and appeal of the area's historical sites**

The Brecon Beacons has a number of attractive and interesting historical sites but individually and collectively they are not well known. These include small castles, manors, churches and religious buildings and some archaeological sites. They feature in the National Park Authority Interpretation Strategy, which has an important role to play in increasing interest in and understanding of the heritage of the area. A number of initiatives are seeking to bring individual sites more to life, including a particular approach from Cadw to provide more creative interpretation and animation at their sites. The profile of the heritage should be raised far higher in the area's tourism offer. Relevant action includes:

- Strengthening interpretation of historical heritage at sites and elsewhere – bring out local stories, myths and legends
- Linking small sites together thematically and through information and interpretation
- Making more of the often stunning settings of the historical sites
- Extending opening times
- Improving physical access, amenity and facilities at sites
- Increasing awareness of tourism stakeholders and local people, including making more of historical heritage within the Ambassadors programme

- Strengthening attention to heritage within the BBNPA and links to Cadw and other agencies.

► **4.6 Make more of the industrial heritage of the area and links to The Valleys**

The Blaenavon World Heritage Site in the south east corner of the Brecon Beacons is a unique attraction for the area, underlined by its international recognition by UNESCO. The tourism potential and product diversification this brings to the area needs to be capitalised on much more strongly. The Forgotten Landscapes Project and other initiatives will be providing considerable resources for improving interpretation, access, site restoration and visitor facilities. The BBNPA has an SLA with the Forgotten Landscapes Project and significant progress has been made here by the information and interpretation team. Elsewhere in the Brecon Beacons the industrial heritage is important but largely hidden, and is perhaps most manifest through the various routes, including cycling and walking trails into the park from the south. This theme is important as part of the link with the Valleys as an emerging destination and with the Regional Park initiative. The advent of significant new investment in recreation and visitor facilities in Merthyr and elsewhere is relevant to this. Action to make more of this opportunity includes:

- Making far more of Blaenavon WHS in the marketing of the area and in supporting information.
- Ensuring that the wider Brecon Beacons area and linked themes are promoted to visitors coming to Blaenavon.
- Seeking ways of bringing out other industrial heritage interest across the Brecon Beacons, especially through the Geopark.
- Developing stronger promotional and information links with The Valleys as a whole, including liaising with their tourism ambassadors scheme.

► **4.7 Maximise on the opportunities presented by the Monmouthshire and Brecon canal**

While the Canal is in itself a key part of the industrial heritage interest and story of the Brecon Beacons, it also has a wider significance as a special resource for various aspects of tourism, unique in this part of Wales and within national parks in general. It should feature more prominently in the tourism offer and promotion of the area. Actions should include:

- Further developing and implementing the model of identifying and linking small hubs along the canal, each with their own distinctive visitor interest and facilities.
- Supporting implementation of the Master Plan for Goytre Wharf developed by British Waterway with Visit Wales and other partners.
- Improving the towpath as a high quality linear route for walking and cycling
- Continuing to improve canoe access and use of the canal as part of linked canoe trails
- Promoting boating as a unique way of experiencing the Brecon Beacons
- Managing the water capacity in the canal and competing uses
- Using the canal as the basis for events, festivals and cultural activities, making creative use of the 200th Anniversary in 2012 to boost engagement and awareness..

► **4.8 Bring out the area's living cultural heritage as part of the visitor appeal**

Living cultural heritage, manifest through people, traditions, arts, crafts and music is often a key part of successful rural destinations. The Brecon Beacons has these strengths but they are not as clearly visible and accessible to visitors as in some other parts of Wales and neighbouring English counties. Actions to address this include:

- Giving more exposure to Welsh culture and language, including place names and association in literature and music
- Encouraging those with family connections to the area to visit, research family histories and explore associations with local communities.
- Identifying and promoting local music groups to visitors, notably choir practices and performances
- Encouraging more opportunities for visitors to see and purchase local arts and crafts
- Promoting local village and agricultural shows to visitors

► **4.9 Promote awareness and use of local produce**

The food and drink offer in the Brecon Beacons includes many examples of excellent quality produce and eating places, especially in the eastern areas of the Park. Visitors are increasingly seeking out good eating experiences and local produce adds to the distinctive character of the area as well as capturing visitor spend for local food and farming businesses. Every opportunity should be taken to ensure that visitors are pointed to quality food and drink experiences, working with partner destinations where possible while continuing to create opportunities to reinforce the Brecon Beacons own brand values. This may include:

- Encouraging local food and drink businesses to enter award schemes and promoting those that are successful.
- Including local producers offering visits and direct sales in information about places to visit, and supporting those with potential to offer farm or site visits in improving their visitor facilities and interpretation.
- Identifying food and drink products that have a special association with traditional land management practices, including upland grazing and orchards; promoting and celebrating the traditional strength of the area in raising stock for lamb and beef.
- Continuing to arrange and support 'Meet the Producer' events to bring together suppliers with hospitality businesses.
- Raising awareness of opportunities for self-catering visitors to pre-order produce or to arrange catered or prepared meals during their stay.
- Encouraging spin-off opportunities from major food events, including food-themed packages.
- Continuing promotion of the Black Mountains Breakfast and other schemes to increase use of local produce by serviced accommodation providers.
- Promoting local food events and farmers markets.

► **4.10 Provide a creative range of opportunities to experience the area's wildlife and geology, particularly but not only in the Geopark**

Seeing wildlife is an important aspect of visits to the Brecon Beacons. A significant proportion of respondents to the visitor survey reported that they have watched birds. In terms of geological interest, various opportunities are available from the Geopark designation and the resources and activities associated with this. Action to make more of these themes include:

- Drawing attention to opportunities to see wildlife in general access information and marketing, taking opportunities to put across conservation messages
- Develop an interactive visitor-facing wildlife project, aiming to highlight the wildlife that can be experienced in relation to habitats found in the Brecon Beacons and enabling visitors to contribute towards the knowledge of eg distribution/abundance of important species
- Reviewing the range of nature related walks and events offered by the BBNPA, Forestry Commission, National Trust, Local Authorities and conservation bodies and seeking ways to better coordinate and present them as a significant and high profile product for incoming visitors.
- Completing and implementing the interpretation plan for the Geopark
- Developing and promoting a range of Geopark activities as a tourism experience, including geology trails, interpretative events and the Geopark Festival
- Working with the National Showcaves Centre at Dan yr Ogof on the interpretation of the area's geology.

► **4.11 Promote and strengthen the range of events in the area**

The Brecon Beacons is the home for sizeable and distinctive events. The Visit Wales Major Events Unit identifies and supports a number of them as Signature Events, which are required to provide a high quality experience and reflect Welsh culture, traditions and values. There are also many smaller events, often community supported, that provide a flavour of the local area. These include individual events and programmes of activities such as the developing number of walking festivals. The challenge is to make existing and new events more effective in delivering tourism benefits. Actions should include:

- Lending support to the larger events to retain and live up to the Signature Status, in terms of quality, content and the Welsh dimension, and bring more events to this level
- Encouraging and supporting local communities in the establishment and running of events
- Encouraging events in the less busy periods
- Encouraging evening events that can be promoted with overnight stays
- Improving communications to enable more coordination and advance planning
- Linking small events together into programmes
- Considering an area wide Mountain Festival of linked events
- Identifying and encouraging events that are aimed at families and other target markets.

► **4.12 Develop specific initiatives to promote and deliver accessible and socially inclusive tourism**

Social inclusion is an important principle for this strategy. Taken in its widest sense this is about providing opportunities for minority groups and people with various disabilities and disadvantages. The BBNPA has addressed this subject through various initiatives, including work with a Disabled Access Group, creation of a Social Inclusion Plan and projects such as Crossing Park Boundaries and Mosaic. There is a current Easy Access Guide for the National Park. The responsibility to deliver a welcoming and quality experience of the Brecon Beacons to all visitors and also the opportunity to gain benefits from attracting the sizeable markets involved, should be actively pursued. This may be best tackled through a

comprehensive new initiative involving a combination of marketing, information and product development. It could include:

- Involving bodies knowledgeable about disability and social inclusion in guidance and planning
- Increasing tourism stakeholder awareness of the issues and opportunities
- Identifying and drawing out relevant products and identifying gaps and needs
- Improving infrastructure
- Encouraging and supporting relevant private sector investment
- Providing relevant information material and promoting to identified markets
- Building on experience of the information and interpretation teams who include best practice guidelines in all project briefs.

5 Communities and place making

To work with local communities to strengthen the individual distinctiveness of the towns, villages and rural areas in the Brecon Beacons and their appeal and amenities for visitors and local residents

Delivering sustainable tourism partly through supported action at a local community level is an important part of the approach in the Brecon Beacons. Considerable efforts have been made in delivering this in recent years, which should be built on in this strategy. The COLLABOR8 programme established a number of community based business clusters which have been pursuing tourism initiatives in the different communities. The new Rural Alliances programme will move forward with what has been achieved, centred on wider community engagement.

Consultation undertaken for this strategy revealed strong support for community engagement but concern about fragmentation and also the varying and ephemeral capacity at a community level. The approach should be that communities are encouraged to engage and pursue opportunities that match the objectives of the destination for delivering a high quality experience and fill a gap in provision but that responsibility remains at a higher level with the Brecon Beacons National Park Authority, Brecon Beacons Tourism, local authorities and other partners.

A number of the actions identified under other objectives can be carried out at a community level through local engagement. The opportunities are not repeated here. The actions below centre specifically on improving the appeal of towns, villages and rural areas for local people and visitors – a process sometimes referred to as place making.

► **5.1 Create a framework and programme for Brecon Beacons level guidance and support for community action in tourism**

An umbrella framework is necessary in order to provide the necessary guidance and coordination and avoid fragmentation and duplication. Consultation and input to this should enable the partner bodies working across the Brecon Beacons, notably Brecon Beacons Tourism, to ensure that local work is well integrated to their priorities and initiatives and does not compete for resources, including their own time, that should be devoted to the work of delivering and marketing sustainable tourism for the destination as a whole. Action required involves:

- Reviewing existing activity and resources in all communities

- Reviewing the geography of community influence, including rural areas around towns
- Identifying broadly the subjects for community-level engagement
- Consulting with destination partners
- Identifying processes for linking community action together and into destination level activity
- Ensuring that those producing material at a local level are encouraged to embrace in some way the overall brand of the area without losing their own unique local identity.
- Preparing a framework to guide local communities in their approach to sustainable tourism, and identifying resources to support their activity.

► **5.2 Assess and strengthen the level of awareness amongst communities of tourism and its contribution**

This action is about obtaining a greater understanding of how tourism affects local people, including their current engagement with it. It is also about advocacy to widen appreciation of the contribution of tourism to different aspects of community life and livelihoods. It could involve:

- Conducting surveys of residents
- Holding open meetings in the communities
- Encouraging stronger liaison between tourism enterprises and local groups
- Engaging local media.

► **5.3 Establish or strengthen community based structures for tourism management**

There is a need for clarity of responsibility for tourism activity at a community level, with an efficient structure for relating this to work at the level of the Brecon Beacons.. Most communities will have a number of existing bodies that are already involved in community action which has some bearing on tourism, and it may not be necessary or desirable to create new ones. COLLABOR8 Cluster Groups are established in many places and feed into the work of BBT and the BBNPA and may form the basis for future community engagement. Action to determine effective structures or models should involve close consultation with the local authorities, Community Councils, enterprise clusters, civic societies and other bodies.

► **5.4 Clarify community tourism visions, priorities and programmes**

The principle behind the objective is that communities themselves should figure out what they want from tourism and what they would like to see happening over the next five years and beyond, with the wider framework given to them. Much has already been achieved here through Tourism Action Plans prepared with COLLABOR8 support, on behalf of local clusters of businesses. These may or may not need to be refreshed in order to embrace a wider community perspective. This may involve holding workshops, meetings and producing simple reports, including:

- Undertaking a facilitated visioning exercise
- Reviewing the local situation and work to date – success and challenges
- Identifying priorities for short, medium and long term actions
- Considering resources and funding currently and in the future, so that the approach can be sustainable.

► **5.5 Identify needs and Implement actions to improve appearance, amenities and security in towns, villages and the wider countryside**

The appearance and feel of a place is fundamental to the visitor response and tourism performance. The enterprise and visitor surveys have indicated that in general the Brecon Beacons performs reasonably in these matters, but there is room for improvement in the upkeep of the towns and the provision and maintenance of facilities such as car parks and toilets and general cleanliness. Some concerns were also expressed about vandalism, car security etc in particular towns and the wider countryside. Relevant action in each community includes:

- Identifying priorities with respect to: overall appearance e.g. facades of buildings; maintenance of public areas; toilets and other services; general cleanliness; community attitudes to visitors; policing and security; etc.
- Considering responsibilities for these matters and making representation e.g. to the relevant local authority, BBNPA and other bodies.
- Engaging the private sector and seeking support from them
- Identifying and pursuing matters that can be addressed through community action.
- Linking actions to funding sources, including regeneration programmes and the Destination Management Scheme in the Visit Wales TISS programme (also relevant to action area 5.6 below).
- Reviving the Car Park Watch scheme if the opportunity arises.

► **5.6 Ensure effective visitor orientation in each community and implement local projects to engage the interest of visitors and residents**

The overall objective is to encourage visitors to explore the towns, villages and rural communities and to stop and spend time and money there. This applies also to local residents in the Brecon Beacons and community members themselves. This is about making sure that people know where to go and what to see and providing additional reasons for a visit and a stay. It may be useful to revisit the currently unde-utilised Community Walking and Interpretation Toolkit. Relevant action includes:

- Reviewing signposting to and within the communities, car parks, maps and orientation
- Ensuring that there is at least one place where visitors can pick up local information – TIC, information point, shops or attractions in the Ambassadors scheme, etc.
- Providing one or more local trails
- Establishing an events programme involving the community
- Ongoing provision, monitoring and improvement to the above to expand and strengthen interest over time.

► **5.7 Seek to engage more actively with the farming community**

The activities of farmers and land managers in the Brecon Beacons are vital to the success and sustainability of tourism. They are responsible for creating the landscapes that people come to enjoy and managing much of the land over which access takes place. Many are also well placed to add value to tourism and gain benefit from it through diversification into the provision of food, accommodation, attractions and other facilities and the Rural Development Programme offers

opportunities here. It is important that there is regular engagement with the farming community on tourism matters. This could involve:

- Arranging for a member of the tourism team to attend meetings already arranged by the National Park Authority with representatives of farming and land management interests
- Taking action to encourage the provision and promotion of farm tourism enterprises, especially where they offer the opportunity to engage with the farming community and to appreciate the special qualities of the Brecon Beacons.
- Promoting more sales of local produce to visitors and its use in the tourism supply chain

Considering ways to highlight or promote visitor services, including accommodation, which are based on registered agricultural holdings,

6 Supporting businesses

To encourage and assist tourism-related enterprises to improve their quality and performance, undertake appropriate investments and work together to ensure the success of the Brecon Beacons as a sustainable tourism destination

The success of the Brecon Beacons as a destination and the gaining of economic, social and environmental benefits for the area depends on the activities of tourism businesses. While individual business performance is critical, actions may be taken independently or collectively by enterprises. This objective is about stimulating enterprise engagement and providing support to meet their needs.

► **6.1 Strengthen membership and resources of Brecon Beacons Tourism as the lead and umbrella private sector body**

Brecon Beacons Tourism has become well established as a private sector tourism association with an active membership throughout the whole area. It is ideally placed to provide the essential leadership, coordination and support services for businesses large and small that is critical for a successful destination. It should be actively supported by the trade, the BBNPA and other partners to ensure that it has a reliable level of resources to enable it to fulfil its role. This requires:

- Encouraging all tourism enterprises to join BBT
- Strengthening BBT membership from wider tourism-related businesses such as retailing
- Providing ongoing core funding for BBT against agreed criteria
- Ensuring that BBT is engaged in programme delivery where appropriate and is compensated for this through programme funding
- Ensuring dedicated commitment by BBT to the sustainable development of tourism in the Brecon Beacons as set out in this strategy, including full and transparent engagement in partnership working with the BBNPA and other stakeholders.

► **6.2 Maintain and support enterprise clusters where appropriate**

The creation and operation of thematic and geographic tourism enterprise clusters through the COLLABOR8 programme has been successful. This achievement should be maintained and built upon. Relevant action includes:

- Reviewing each group and the views of the membership
- Maintaining successful and valued groups and seeking their expansion as appropriate
- Considering possible new thematic groups
- Relating geographic groups to community initiatives as under Objective 5
- Considering annual programmes of activity in each group and assisting them in implementation
- Ensuring strong links between each group and BBT so that there is mutual support and no duplication or competition between them.

► **6.3 Pursue opportunities for businesses from EUROPARC Charter Part 2**

Part Two of the EUROPARC Charter for Sustainable Tourism in Protected Areas enables individual enterprises that demonstrate verifiable sustainability management, commitment to the area's sustainable tourism strategy and various other conditions, to be recognised individually under the Charter. The BBNPA has presented, but not yet implemented, its proposal to enact this scheme, based on a set of criteria that reflect the above requirements, with qualifying enterprises being recognised as Sustainable Tourism Champions. This will require:

- Promoting the criteria to enterprises
- Clarifying the benefits to enterprises, including listing by EUROPARC, display of a logo and other promotional opportunities
- Receiving and processing requests for recognition.

► **6.4 Strengthen the overall quality of tourism services in the area**

Feedback from the visitor survey and general consultation has indicated that the quality of the tourism offer is weakest in the area of catering, This appears to apply particularly to cafes, restaurants and pubs but may also relate to catering in hotels. Concern has also been expressed about variability in the quality of accommodation. Clearly, there is some very good provision – the concern relates to the general level across the area. Associated steps to promote local produce and its use are included in Section 4.9, but action to tackle quality issues overall could include:

- Running annual award schemes and associated publicity
- Providing more training and awareness programmes for caterers
- Taking advantage of funding for food related activity within the various RDP programmes.
- Incorporating quality assessment into criteria for participation in promotional campaigns and other initiatives
- Highlighting gaps in provision of quality accommodation, especially amongst serviced accommodation with 4+ rooms.
- Encouraging visitor attractions to join the Visitor Attraction Quality Assessment Scheme
- Considering the need for successor arrangements when the current scheme(s) under which activity operators are licensed comes to an end.

► **6.5 Promote access to, and uptake of, business support, advice and skills training for tourism enterprises and staff**

Enterprise performance can be helped by training and advice. The challenge is to get more enterprises to take this up. Particular benefits may be seen from support with marketing, digital technologies, small business development, catering and general service provision. Various programmes exist nationally, regionally and locally to provide this support. Activities currently undertaken by a partnership involving the BBNPA, BBT and Medrwn and Capital Region Tourism provide a strong platform to build on. Priority for action rests with communication and linking to support, including:

- Encouraging enterprises to work together to identify their training needs and providing them with information on what help is available. This can be facilitated through BBT and cluster groups.
- Working through regional schemes, including those involving Medrwn, Gallu and Capital Region Tourism, to support training which meets the identified needs
- Pursuing and signposting one to one advisory services, such as mentoring schemes
- Offering incentives such as social activities linked to training
- Publicising examples of good practice and where training has worked particularly well.
- Keeping abreast of national and regional schemes to promote tourism as a career, including Springboard Wales, and considering how this may relate to labour supply needs of Brecon Beacons enterprises.
- Seeking ongoing support and information from the regional tourism bodies as the lead organisations in this field.

► **6.6 Encourage investment in new or improved tourism accommodation, attractions and services in line with market opportunities, gaps and sustainability principles**

The range and quality of accommodation, attractions and activity provision in the Brecon Beacons is relatively strong. The general approach should be to seek continuous improvement in the quality of the offer in all aspects, year on year. This is seen as primarily taking place through investment in existing properties and services although some new provision, through conversions and appropriate new build, may also occur subject to the provisions of the Local Development Plan once adopted. While no major gaps are identified, particular opportunities may rest with:

- More hotels and guest houses that offer a really high quality experience, scoring highly with the media and customer generated recognition
- New forms of accommodation that provide a strong experience of nature and are environmentally friendly – high quality camping, small eco-units etc.
- General improvement in camping and caravan sites
- Investment in facilities in accommodation to meet the need of walkers, cyclists and other activities
- Investment in environmental capital in accommodation e.g levels of insulation, renewable energy sources, rainwater harvesting etc.
- Innovative catering outlets using local produce
- Creative attractions related to historic, industrial and cultural heritage and other local themes.

Actions to encourage these and other forms of sustainable investment include:

- Providing all existing enterprises and enquirers with information about the range of financial assistance available. Currently, this includes the Visit Wales TISS programme and the RDPs for the various counties, all of which have elements related to sustainable tourism projects
- Supporting feasibility studies and pilot projects as appropriate
- Providing any available relevant data and knowledge on markets to potential investors
- Holding a workshop on tourism investment opportunities bringing together enterprises, landowners, funding bodies and planners (linked also to 6.7 below).

► **6.7 Encourage positive dialogue between tourism enterprises, landowners, investors, communities and planners**

Careful control of development through a robust planning system has been extremely important for tourism in maintaining the appeal of the special landscapes of the Brecon Beacons. However, some tourism stakeholders and potential investors have come to view the BBNPA negatively as a planning authority that places barriers in the way of change. It is important that the perceptions of the planning system do not prevent appropriate new sustainable tourism projects from coming forward. There is a need for good understanding on all sides, especially with the adoption of a new Local Development Plan in 2012. This can be assisted by:

- Providing clear and positive guidance on types of tourism development that are appropriate in different locations
- Running occasional joint, practical awareness sessions bringing together planners, landowners, tourism enterprises and investors
- Encouraging early dialogue between planners and investors on possible projects
- Avoiding standardised approaches and taking account of the particular circumstances of each project coming forward.

5 IMPLEMENTATION AND MONITORING

The previous section set out a range of priorities for action. Together they form a framework action plan for the five year period 2012 – 2016. This chapter considers the necessary structures for overseeing and coordinating the implementation of the plan and provides an indication of the resources and major stakeholders implicated by the actions. Finally it identifies the processes for monitoring the impact of tourism in the Brecon Beacons and for reviewing the strategy.

5.1 Delivery structures

The Brecon Beacons has a wealth of interest and experiences for the visitor and a well established tourism sector. The area has huge potential with many exciting prospects for further delivering sustainable tourism as set out in this strategy and action plan. It is very well placed to perform strongly in its own right as a leading destination with Wales, a fact that was recognised by Visit Wales in granting destination status to the area.

However, this is a complex area administratively. As well as the Brecon Beacons National Park Authority itself, a number of local authorities contain a part of the National Park, including Powys, Monmouthshire, Carmarthenshire and the various Valleys authorities. Each of these is engaged in tourism and forms the basis of a tourism marketing area that contains parts of the Brecon Beacons. Three of the four Regional Tourism Partnerships cover some part of the area. There are a number of public sector bodies and agencies who have land ownership and management responsibilities in the Brecon Beacons or who undertake functions relevant to tourism. Various civil society interests are also stakeholders in tourism in the area. The private sector is brought together by Brecon Beacons Tourism, which has the advantage of covering the whole area, but there are also other private sector associations, including those in the overlapping marketing areas and the thematic and geographic cluster groups, some of the latter centred on the various small towns which also have other local community stakeholders.

The basis for an effective delivery partnership

In the light of the above complexity, an efficient partnership structure for the delivery of sustainable tourism is an essential requirement. The partnership approach has been identified as fundamental to the workings of the National Park Authority and a key principle of this strategy. It is also fully recognised round the world, let alone in Wales and the rest of the UK, as essential for effective destination management for sustainable tourism.

Conditions for destination partnerships in Wales are set out by Visit Wales in the Wales Tourism Partnership Framework Principles. These specify the need for local authority (including in this case the National Park) engagement with the private and 'third' sector in destination management.

The requirements for destination partnerships are particularly clearly spelt out in the Mid Wales Regional Tourism Strategy, 2011, which covers most of the area. It identifies the Brecon Beacons as one of four destinations for Mid Wales. It goes on to specify three essential requirements for these destinations:

- The establishment of an appropriate, representative private sector association in each destination. This is seen as essential in ensuring that private sector businesses ‘have a clear representative voice and that there is a formal channel for other stakeholders, notably the local authority, to communicate and engage with them’.
- The coordination of functions within the local authority²⁶ that have a bearing on tourism, ensuring effective internal and external communication, e.g. with the private sector.
- The establishment of appropriate partnership arrangements between the latter two groups (i.e. the private sector association and local authority²⁷) and also other stakeholders including TPMW, local communities and other interests.

A further underlining of the need for partnership comes from the EUROPARC Charter which requires there should be a stakeholder forum to guide tourism that includes the representatives of the National Park Authority, tourism businesses, local communities and conservation interests.

In addressing delivery requirements for this strategy, consideration has been given to some principles that lie behind efficient partnership functioning and which could be used to guide the make up and performance of future delivery structures here. These include:

- Ensuring all relevant stakeholders have buy in, are kept informed and can make contributions if they wish to do so
- Ensuring a good balance between public and private sector interests
- Having an independent chair
- Keeping meetings to a minimum
- Strengthening attendance and commitment to meetings by those who should attend
- Keeping meeting sizes manageable, especially working meetings
- Ensuring efficient running of meetings and communications
- Providing swift action-based minutes
- Checking and following up on actions.

The Brecon Beacons Sustainable Tourism Partnership

The Brecon Beacons Sustainable Tourism Partnership already exists and provides the basis for partnership working and delivery of the strategy. However, it should be reshaped and reinvigorated in the light of the above principles and the imperative of having a truly effective and efficient partnership structure.

The twin pillars of the partnership should be the Brecon Beacons National Park Authority as the lead public sector authority with responsibility for the Protected Area and Brecon Beacons Tourism as a membership body representing the private sector and covering the whole of the Brecon Beacons. This combination fits exactly the requirements laid down by the Mid Wales Tourism Strategy reflecting the Wales Tourism Partnership Framework.

²⁶ Assumed to apply also to the National Park Authority

²⁷ *ibid*

Framed by these two pillars, the Brecon Beacons Sustainable Tourism Partnership (BBSTP) should be a broad church housing a significant number of stakeholders. It should comprise:

- The BBNPA (4 representatives of relevant National Park interests)
- Brecon Beacons Tourism (4 representatives)
- Visit Wales
- The three Regional Tourism Partnerships: TPMW, CRT and SWWTP
- All the Local Authorities containing a part of the National Park
- All the Cluster Groups
- Key resource ownership/management/conservation bodies: Forestry Commission Wales; National Trust Wales; Cadw; British Waterways, CCW
- Possibly other bodies, to be determined – e.g. One Voice Wales, Mid Wales Tourism; NFU etc.

An additional member of the BBSTP should be an appointed independent chair, with no specific affiliation. He or she should be an experienced person who commands respect and has knowledge of the tourism industry, the responsibilities of the National Park Authority and the functions of local government.

This breadth of membership will ensure that all the main players have a sense of ownership of tourism management in the area, are informed of issues and activities and can comment on and help to shape them. The Partnership as a whole should meet twice per year. Its functions will be as follows:

- Leading the planning and implementation of activity relating to sustainable tourism in the Brecon Beacons;
- Fostering a sense of ownership of the sustainable tourism strategy on the part of stakeholders;
- Providing a vehicle for communication between stakeholders;
- Reviewing and approving the annual work programme.

A small and well balanced Executive Group should be formed to manage the work of the BBSTP. It should meet quarterly. It should have seven members:

- The BBSTP Chair
- Two representatives of the BBNPA
- Two representatives of Brecon Beacons Tourism
- Powys County Council
- Tourism Partnership Mid Wales (representing Visit Wales and all three Regional Tourism Partnerships).

The functions of the Executive Group will be as follows:

- Planning and setting an annual work programme to deliver the sustainable tourism strategy over the course of five years;
- Allocating tasks and identifying opportunities to co-ordinate activity;
- Overseeing delivery and implementation;
- Checking and reporting on progress.

Minutes of the Executive Group meetings will be circulated to all BBSTP members. Additional members of the BBSTP (or non-member stakeholders or experts) may be invited to attend the meetings as required.

An annual meeting of the full BBSTP will receive a report from the Executive Group on the year's work and approve the direction and priorities for the forthcoming year.

The BBSTP may also form Working Groups which will report to the Executive Group. Currently three Working Groups are in place or are envisaged, as follows, although others may be formed as permanent or task-and-finish groups:

- Brecon Beacons Marketing Coordination Group (BBMCG)
- Visitor Transport Working Group
- Tourist Information Centre Liaison Group.

The Brecon Beacons Sustainable Tourism Partnership has responsibility for overseeing the entire budget of the BBMCG and signing this off against an action plan agreed with the Regional Tourism Partnerships who have provided the funding. At the present moment, this applies to no other working group. In view of this, clear guidelines are required to govern the relationship between the Working Group and the STP, or the Executive Group acting on its behalf, in relation to matters such as levels of accountability and delegated powers.

Each individual cluster group will be entitled to membership of the BBSTP. They will be represented on the Executive Group by Brecon Beacons Tourism. The Board of BBT will contain representatives of the clusters.

Board meetings of BBT should be attended by a representative of BBNPA to strengthen this important link and ensure effective two way communication.

Wider relationships and communication

Representatives involved in the BBSTP should be those people directly involved with tourism work within their respective bodies.

It is very important that internal liaison on tourism matters within these individual organisations is good, so ensuring that the representatives are able to report on all the organisation's activities that have a bearing on tourism and can also report back to, and influence, their colleagues. Internal communication of this kind is especially important within the BBNPA, given the considerable spread of relevant activities that it carries out.

In order to secure strong local government support for the work of the BBSTP and the implementation of this strategy, a high level Brecon Beacons Tourism Summit should be held once per year. This meeting would involve senior figures from the BBNPA, Local Authorities and Regional Tourism Partnerships.

Horizontal communication between the BBSTP and other structures within the area that are involved with tourism will be important. In particular, there needs to be a strong link with the structures involved with the Geopark designation.

The BBSTP should ensure that its presence and work is well known to all tourism stakeholders across the area. This will require some direct communication activity by the BBSTP as such as well as the maintenance of good feedback by the partners to their own members or constituencies of interest.

An annual open conference should be held once per year, carrying forward the current Tourism In Action Conference.

5.2 Implementing the action plan

The implementation of this strategy and action plan will be responsibility of the Brecon Beacons Sustainable Tourism Partnership. The action areas set out in the previous chapter, and tabulated in this section, should be used by them as a guideline. They should form the basis for the drawing up of a more specific Annual Action Plan each year.

The funding of the actions will come from many sources. The strategy and action plan can itself be a basis for raising funding. The main sources of funding apparent at the outset include:

- Core funding for Brecon Beacons as a destination from Visit Wales and supplied through TPMW under agreement
- The budgets of BBNPA, Local Authorities and other partners
- Private sector contributions to actions
- The Visit Wales Tourism Investment Support Scheme, which is available for enterprise projects and destination amenity under specified criteria
- European Union funding such as the Interreg IVB new programme that has funded the COLLABOR8 and Rural Alliances programmes
- The Rural Development Programmes established by the different counties, which each have identified support for rural tourism, variously in the areas of: small business support, sustainability, heritage, food and agro-tourism, community projects, events, certain forms of infrastructure, research, pilot projects and training
- Lottery based funding programmes
- Other Welsh Assembly Government programmes.

In implementing the action plan, opportunities should be taken to make use of resources, including human resources, which other institutions may provide. This may include the involvement of postgraduate students undertaking research assignments in pursuit of their qualification.

The five year action plan is summarised in the table that follows. This indicates:

- The level of priority of the action – high priority shown by a star (*).
- The year or years in which it might fall
- An indication of the level of financial resources that may be required as follows:
Low (L) Under £20,000
Medium (M) £20,000– £75,000
High (H) Over £75,000
- Key agencies to implement the action.

Key to abbreviations used in the table

Ambs	BBNP Ambassadors	LAs	Local Authorities
BBMCG	Brecon Beacons Marketing Co-ordination Group	NT	National Trust
BBNPA	Brecon Beacons National Park Authority	PS	Private sector
BBPS	Brecon Beacons Park Society	RAWG	Remote Areas Working Group
BBT	Brecon Beacons Tourism	RTPs	Regional Tourism Partnerships
BW	British Waterways	RTCs	Regional Transport Consortia

Cadw	Cadw	SWOAPG	South Wales Outdoor Activity Providers Group
CBs	Conservation bodies	VRP	Valleys Regional Park
CLB8	COLLABOR8 Clusters	VTP	Visitor Transport Partnership
CCs	Community Councils	VW	Visit Wales
F&E	Festivals and Events	WHS	Blaenavon World Heritage Site
FCW	Forestry Commission Wales	WUF	Wye and Usk Foundation
FFG	Fforest Fawr Geopark	WW	Welsh Water
HBS	Heritage bodies		

	Action	Priority	Year	Financial Implication	Key Agencies
1	EFFECTIVE MARKETING				
1.1	Strengthen understanding of target market profiles and perceptions	***	1-2	H	BBMCG, VW, RTPs, LAs, PS, BBNPA, BBT
1.2	Establish and disseminate the Brecon Beacons brand values	***	1	M	BBMCG, VW, RTPs, LAs, PS, BBNPA, BBT
1.3	Establish and maintain a high quality web presence for the destination	***	1	M-H	BBMCG, BBT, BBNPA
1.4	Maintain a creative PR, communications and social media programme	***	1-5	M	BBMCG, BBT, VW, PS, BBNPA
1.5	Focus on seasonal and off-peak images, themes and offers	**	1-5	L	BBMCG, BBT, RTPs, BBNPA, PS
1.6	Ensure full synergy with Visit Wales and partner marketing programmes	***	1-5	L-M	BBMCG, VW, RTPs, PCC, other LAs
1.7	Make positive use of designations, without confusing the brand	**	1	L	BBNPA, BBMCG
1.8	Obtain exposure for the Brecon Beacons at major generative events	*	1-5	L	BBMCG, F&Es, VW, BBNPA
2	COORDINATED INFORMATION AND INTERPRETATION				
2.1	Develop and implement strategies for information and interpretation	***	1	L-M	BBNPA, LAs, BBT, FFG, FCW, NT, WHS
2.2	Consolidate the Information Centre network, strengthening stakeholder engagement and support	***	1-2	L	BBNPA, LAs, BBT, FFG, FCW, NT, WHS
2.3	Pursue redevelopment of the National Park Visitor Centre	***	1-3	H	BBNPA, FFG
2.4	Expand the individual delivery of information and interpretation through the Ambassadors scheme and more widely	**	1-2	L-M	BBNPA, BBT, Ambs
2.5	Seek improved broadband coverage and opportunities for further use of IT in information delivery	**	2-5	M-H	BBNPA, RTPs, LAs
3	ENVIRONMENTAL RESPONSIBILITY				
3.1	Support all actions to maintain a quality environment	***	1-5	L-H	BBNPA, NT, FCW, CBs, WUF
3.2	Clarify and pursue spatial visitor management policy across the Park	***	1-2	L	BBNPA, FFG, RAWG, NT, FCW, SWOAPG
3.3	Extend access codes for specific areas and activities	**	1-5	L	SWOAPG, BBNPA, FCW, NT, WW, BW
3.4	Ensure best possible integrated public transport services, supported by information and promotion	***	1-5	L-H	VTP, LAs, RTPs, BBNPA, RTCs

	Action	Priority	Year	Financial Implication	Key Agencies
3.5	Encourage tourism enterprises to strengthen sustainability management	***	1-5	L	BBNPA, BBT, Glasu, Adventa, VW, CLB8, PS
3.6	Encourage visitors to contribute to the conservation and enhancement of the National Park and its environment, financially and by behavioural change	*	2-4	L	BBNPA, NT, CBs, BBPA, PS
4	PRODUCT DIVERSITY				
4.1	Maintain high quality walking experiences and general countryside access at all levels	***	1-5	H	BBNPA, LAs, FFG, NT, FCW, BW, WW, WHS
4.2	Provide a range of cycling experiences matched to differing markets and terrain	**	1-5	H	BBNPA, LAs, FCW, PS, BW, VRP
4.3	Further establish the Brecon Beacons as the primary destination for horse riding in Wales	**	1-5	H	BBNPA, LAs, FCW, PS
4.4	Develop more opportunities for visitors to experience the wide range of supported outdoor activities where capacity allows	**	1-5	M	SWOAPG, BBT, PS
4.5	Strengthen the awareness, accessibility and appeal of the area's historical sites	***	1-5	L-H	HBs, Cadw, WHS BW, BBNPA
4.6	Make more of the industrial heritage of the area and links to The Valleys	*	2-5	L	WHS, VRP, Cadw, HBs, LAs, BBNPA, FFG
4.7	Maximise on the opportunities presented by the Monmouthshire and Brecon canal	***	1-3	L-H	BW, LAs
4.8	Bring out the area's living cultural heritage as part of the visitor appeal	***	1-5	L-M	F&Es, CLB8, CCs, PS, BBNPA
4.9	Promote awareness and use of local produce	***	1-5	L-M	BBT, LAs, BBNPA, F&Es
4.10	Provide a creative range of opportunities to experience the area's wildlife and geology, particularly but not only in the Geopark	**	1-3	L-M	FFG, CBs, SWOAPG
4.11	Promote and strengthen the range of events in the area	***	1-5	L-M	F&Es, BBNPA, FFG, CLB8, BW
4.12	Develop specific initiatives to promote and deliver accessible and socially inclusive tourism	**	2-3	M-H	BBNPA, LAs, VTP
5	COMMUNITIES AND PLACE MAKING				
5.1	Create a framework and programme for Brecon Beacons level guidance and support for community action in tourism	***	1-2	L	BBNPA, BBT, CLB8, CCs
5.2	Assess and strengthen the level of awareness amongst communities of tourism and its contribution	***	1-2	L-M	BBNPA, CLB8, CCs, LAs
5.3	Establish or strengthen community based structures for tourism management	***	1-2	L	BBNPA, BBT, CLB8, CCs, LAs
5.4	Clarify community tourism visions, priorities and programmes	***	1-2	L-M	BBNPA, BBT, CLB8, CCs, LAs
5.5	Identify needs and implement actions to improve appearance, amenities and security in towns, villages and the wider countryside	**	2-5	M-H	LAs, CLB8, CCs, PS, NT, FCW,

	Action	Priority	Year	Financial Implication	Key Agencies
5.6	Ensure effective visitor orientation in each community and implement local projects to engage the interest of visitors and residents	**	2-5	M-H	BW LAs, CLB8, CCs, PS, BBNPA
5.7	Seek to engage more actively with the farming community	**	1	L	BBNPA, PS, NT, WUF, Ambs
6	SUPPORTING BUSINESSES				
6.1	Strengthen membership and resources of Brecon Beacons Tourism as the lead and umbrella private sector body	***	1-5	M	BBT, RTPs, VW, PS, LAs
6.2	Maintain and support enterprise clusters where appropriate	**	1-5	L-M	BBNPA, BBT, CLB8
6.3	Pursue opportunities for businesses from EUROPARC Charter Part 2	*	2-5	L	BBNPA, BBT
6.4	Strengthen the overall quality of tourism services in the Brecon Beacons	***	2-3	L-M	BBT, RTPs, BBNPA, F&Es
6.5	Promote access to, and uptake of, business support, advice and skills training for tourism enterprises and staff	***	1-5	M	BBT, RTPs, LAs, Medrwn, Gallu, CRT, BBNPA
6.6	Encourage investment in new or improved tourism accommodation, attractions and services in line with market opportunities, gaps and sustainability principles	***	1-5	H	VW, RTPS, LAs, PS
6.7	Encourage positive dialogue between tourism enterprises, landowners, investors, communities and planners	***	2-3	L	BBNPA, LAs, PS, FCW, NT

5.3 Indicators

In 2008, in partnership with UWIC, the National Park Authority began to consider options for a set of sustainable tourism indicators, based on careful review and extensive consultation with key stakeholders. A report²⁸, published in March 2010, proposed a set of 16 indicators of sustainable tourism in the Brecon Beacons National Park, grouped around five themes: environmental issues, economic issues, community issues, visitor experience, managing the transition towards sustainable tourism

The set of indicators has been adopted, as follows:

Indicator	Source	Frequency
Environmental issues		
Average Upland Path Survey: factor change	Upland Path Survey	Every 3 years
Percentage of SSSI's in unfavourable conservation status due to recreation	CCW data	Annually
Number of site specific visitor management plans being implemented in the BBNP (or	Review of site specific management plans	Every 3 years

²⁸ Sustainable Tourism Indicators for the Brecon Beacons National Park, 2010,

plans including Visitor Management)		
Number of site specific visitor management plans less than 5 years old being implemented in the BBNP (or plans including Visitor Management)	Review of site specific management plans	Every 3 years
Number of tourism businesses signed up to Green Tourism Business Scheme or other relevant certification scheme	Certification scheme records	Every 2 years
Number of Beacons Bus passenger journeys	Beacon Bus Passenger Statistics	Annually
Economic issues		
Total Spend (STEAM) £M	STEAM (year previous)	Annually
Average spend per visitor day	STEAM (year previous)	Annually
Ratio day visitors: staying visitors (% day visitors of total)	STEAM (year previous)	Annually
Community issues		
Number of clusters with approved active action plans	Cluster Data	Annual
Number of local cultural events	Events Programme	Annually
Visitor experience		
Percentage of visitors satisfied with experience of visiting BBNP	Visitor Survey	Every 5 years
Percentage of visitors to the BBNP who are aware that they are in a National Park	Visitor Survey	Every 5 years
Number of easy access events publicised by BBNP	Events Programme	Annually
Managing the transition to sustainable tourism		
Does the BBNP have an up to date sustainable tourism strategy & action plan?	BBNP Sustainable Tourism Strategy	reviewed at 5 year intervals from 2007
Participation levels at sustainable tourism partnership meetings.	BBNP STP minutes	No per meeting Annually

In addition to these already identified indicators, some more general indicators on the functioning of tourism could be added. These include:

- UKTS three year rolling average of visitor trips, nights and spending
- Opening times of attractions
- Annual attendance figures at events
- Visits and enquiries to Visitor Information Centres
- Traffic and user counts at main locations (monthly).
- Number of tourism development projects receiving planning permission
- Proportion of repeat visitors.

- Accommodation occupancy rates and visitor numbers at attractions and main sites (monthly as indicator of seasonality).
- Enterprise performance - increase or decrease compared to previous year(s).
- Proportion of enterprises with quality certification.
- Number of tourism enterprises in membership of Brecon Beacons Tourism
- Percentage of enterprises satisfied with management and marketing of the Brecon Beacons
- Records of air and water quality
- Levels of litter in key sites
- Proportion of visitors arriving by public transport

Information such as this could also be used to support material prepared by the Brecon Beacons National Park Authority for educational purposes.

5.4 Monitoring

It is important that attention is paid to a systematic programme of monitoring. A set of monitoring processes is proposed, involving a combination of surveys, utilisation of external data sources, observation and less formal and structured feedback.

Overall volume and value of tourism

Continued use should be made of the STEAM model to monitor change in the volume and value of tourism in the Brecon Beacons and surrounding area.

Visitor feedback surveys

Qualitative feedback on visitor reaction to the Brecon Beacons should be encouraged. At present, this is sought in a systematic way through an online survey of visitors who have been recruited by members of Brecon Beacons Tourism.

The following topic areas should be addressed as far as possible:

- Profile of visitors; origin and access.
- Satisfaction levels with facilities and services.
- Feedback on perceived quality of the environment and any problems encountered.
- Places visited; activities undertaken.

It should be possible to extend the value of this survey through encouraging partners to include common questions in any feedback that is invited for example by National Park Visitor Centre staff and rangers, organisers of guided walks and events etc. and individual private sector operators. This might be collated annually for discussion and dissemination.

In carrying out their biennial survey of visitors, Visit Wales invite local partners to pay to boost the sample of visitors in their area so that results can be separately analysed and benchmarked against a region or regions and the whole of Wales. Brecon Beacons should opt for a boosted sample as frequently as possible, to provide a control for their own more local findings.

Performance and opinion of tourism enterprises.

This can be monitored in a number of ways:

- Qualitative feedback via BBT.
- Continuing use of a quarterly “how’s business” survey of tourism enterprises, in collaboration with South East Wales Tourism Forum.
- A questionnaire survey of all enterprises undertaken every two to three years. This should repeat many of the questions used in the enterprise survey conducted as part of the development of this strategy.
- Sharing headline results of enterprise surveys carried out by individual partner destinations.

Feedback from local communities

It is important to pick up any changes in community reaction to tourism, for example where specific communities may be concerned about congestion etc. This could be achieved through:

- Qualitative feedback via representation in business clusters, community involvement in Rural Alliances etc.
- Recording complaints received.
- Including reaction to tourism in community liaison work and in any surveys about facilities, services and quality of life.
- Introduction of a survey exploring Community Attitudes to Tourism, both positive and negative.

Physical checks on visitor flows and impacts

This could include monitoring of visitor movements and observation or other records relating to possible impacts:

- Traffic counts on the principal routes.
- Records from people counters located around the Brecon Beacons.
- Recording attendance at visitor centres, events, etc., including monthly figures to check on seasonality.
- Recording car park usage.
- Feedback from transport operators on passenger levels.
- Consideration of management records on endangered species, habitat loss etc. in areas of high visitation.
- Annual audit of any known tourism developments, including planning permissions.
- Undertaking air and water pollution monitoring.
- Observation of changes in habitats and species levels at sensitive sites.
- Regular observation and recording of litter levels at key sites.

5.5 Strategy review

The Brecon Beacons Sustainable Tourism Partnership (BBSTP) should take overall responsibility for the strategy. Individual actions will be led by a range of partners, including the Brecon Beacons National Park Authority and Brecon Beacons Tourism. An annual action plan for the Partnership should be prepared based on this five year strategy and action plan.

Actions undertaken should be recorded and reported to the BBSTP. This should take the form of short quarterly reports and a more comprehensive annual review.

This strategy and action plan will form a key part of the re-application for the EUROPARC European Charter for Sustainable Tourism in Protected Areas. This will be subject to a mid-term review in 2013-14. In 2016 a new strategy and action plan should be prepared and will form the basis for renewal of the Charter.

APPENDIX ONE

Enterprise survey 2011 – scoring of various activities by
a) importance to the success of tourism in the Brecon Beacons and
b) performance of the Brecon Beacons as a tourism destination

Table A.1

Top 15 – importance to the success of tourism in the Brecon Beacons, most important first

Attracting visitors to the area in general
Attracting visitors at less busy times of year
Destination website for Brecon Beacons
Conserving the area's landscape and wildlife
Information on where to go, what to do in the area, pre-arrival
Information on where to go, what to do, post-arrival
Identification and promotion of walking routes/trails
Upkeep and appearance of villages and towns
Range and quality of visitor attractions
Provision and operation of information centres
Providing basic visitor services (eg car parking/toilets)
Encouraging visitors to conserve the area's landscape and wildlife
Attracting visitors at less busy times of the week
Helping tourism enterprises to improve knowledge of the area to pass on to guests
Signposting
Interpretation / promotion of the area's natural heritage / wildlife

Table A.2

Top 15 – performance of Brecon Beacons as a tourism destination, strongest first

Conserving the area's landscape and wildlife
Identification and promotion of walking routes/trails
Interpretation / promotion of the area's natural heritage / wildlife
Range and quality of visitor attractions
Destination website for Brecon Beacons
Provision and promotion of guided walks
Provision and promotion of range of outdoor sports/activities
Attracting visitors to the area in general
Information on where to go, what to do, post-arrival
Information on where to go, what to do in the area, pre-arrival
Advice / training for enterprises on business and marketing
Provision and promotion of events
Support for local tourism bodies/associations
Helping tourism enterprises to improve knowledge of the area to pass on to guests
Encouraging visitors to conserve the area's landscape and wildlife

Table A.3**Weakest 15 – performance of Brecon Beacons as a tourism destination, weakest first**

Clarity of tourism roles between the National Park Authority, Brecon Beacons Tourism and other bodies
Attracting visitors at less busy times of the week
Attracting visitors at less busy times of year
Reducing visitor pressure on certain key areas
Providing and promoting public transport
Spreading visitor spending across the area
Managing promotional campaigns for the area
Providing basic visitor services (eg car parking/toilets)
Packaging of accommodation and activities in the area
Signposting
Identification of National Park boundaries
Managing image and branding for the area
Local provision of tourism career/skills training
Research into visitors and visitor trends
Conserving the area's built environment

Table A.4**15 factors where gap is greatest between importance and performance, ranked by gap descending**

Attracting visitors at less busy times of year
Attracting visitors at less busy times of the week
Providing basic visitor services (eg car parking/toilets)
Signposting
Managing promotional campaigns for the area
Upkeep and appearance of villages and towns
Packaging of accommodation and activities in the area
Providing and promoting public transport
Spreading visitor spending across the area
Attracting visitors to the area in general
Improving visitors' understanding of the effect of their behaviour on the environment
Clarity of tourism roles between the National Park Authority, Brecon Beacons Tourism and other bodies
Provision and operation of information centres
Destination website for Brecon Beacons
Information on where to go, what to do in the area, pre-arrival

INSERT MAP HERE – ALREADY LABELLED APPENDIX TWO

APPENDIX THREE

Brecon Beacons Sustainable Tourism Strategy

Attendance at stakeholder workshop at Castle Hotel, Brecon on 10th May 2011

Norma Barry	Council for National Parks Wales
Neil Bennett	Cluster-Riding
Sharon Birch	Glasbury House
David Brockwell	Cluster-Brecon
Amilia Burrage	Cluster-Promote Crickhowell
John Cook	BBNPA
Ruth Coulthard	BBNPA
Paul Dann	Forestry Commission Wales
John Davies	Baytrans
Melanie Doel	BBNPA
Colin Evans	Cantref Open Farm
Gerwyn Evans	Visit Wales
Andrew Fryer	Cluster-ABO/CRIC/Green
Katie Gates	Torfaen County Borough Council
Christine Hope	Hopes of Longtown
Carys Howell	Brecon Beacons National Park Authority
Tony James	Talgarth TIRC
Elizabeth Jeffreys	Brecon Beacons Tourism
Gwen Jones	Cluster-Abergavenny
Ryland Jones	Sustrans
Helen Jones	Tourism Partnership Mid Wales
Emma Lavery	Brecon Beacons Holiday Cottages
Annie Lawrie	BBNPA
Jane Lewis	Herefordshire Council
Julie Lewis	Powys CC
Frank Marr	
Bob Martin	One Voice Wales
Punch Maughan	Brecon Beacons Tourism
Dave Morgan	British Waterways
Andrew Osborne	Valleys Regional Park
Phil Park	National Trust
James Parkin	Pembrokeshire Coast NPA
Clare Parsons	BBNPA
Richard Preece	Countryside Council for Wales
Bill Purvis	Environment Agency
Alice Pyper	Archaeological Trust (Dyfed)
Joe Roberts	Countryside Council for Wales
Nicola Senior	BBNPA
Vicky Spencer	Heads of the Valleys Initiative
Nick Stewart	BBNPA
Kathryn Stowers	NMW - Big Pit
James Suter	Cluster-Promote Crickhowell
Susie Suter	Gliffaes
David Thomas	Crickhowell Walking Festival
Richard Tyler	BBNPA
Nick Venti	Countryside Council for Wales
Fiona Walker	Llandovery Cluster
Kim Waters	Abergavenny Food Festival
John Watkins	Welsh Assembly Government

Brad Welch	BBNPA
Carol Williams	BBNPA
Rachel Willis	BBNPA
Jim Wilson	Brecon Beacons Park Society
Gill Wright	Cluster-Llandovery (Also Heart of Wales)