

Introduction and Background

(a) Brecon Beacons National Park and Tourism

1.01 The Brecon Beacons National Park is a member of a family of 14 National Parks in England, Wales and Scotland designated by Parliament in 1949. These are nationally important landscapes whose purposes, amended in the Environment Act 1995, are to:

- Conserve and enhance natural beauty, wildlife and cultural heritage;
- Promote opportunities for the understanding and enjoyment of the area's special qualities to the public.

In addition, National Park Authorities also have a duty to foster the well-being of the local community from a socio-economic perspective.

1.02 Tourism in the National Parks and in the Brecon Beacons in particular creates both opportunities and challenges. According to recent STEAM figures, tourism is worth over £126 million to the local economy each year, or £4,000 for everyone who lives in the Park. The benefits from tourism include: helping to maintain and create jobs; sustain local services and facilities; stimulate enterprise and support investment in environmental management. On the other hand tourism in the wrong place, at the wrong time of the year, with excess numbers and inadequate management can create problems.

1.03 More can be done to increase the appeal and viability of tourism in the Brecon Beacons in order to deliver year-round benefits to the local community and strengthen the economy. This can be achieved by building upon the good foundations that have already been put in place and working within the principles of sustainable tourism development.

1.04 The primary appeal of the Brecon Beacons, for both the 3.4 million day visitors and 250,000 tourists staying for a total of 600,000 overnights, is the quality of the natural environment, especially the varied landscapes and diverse scenery. Clearly, however, tourism has the potential to damage these assets upon which the tourism industry depends, if not appropriately managed and marketed.

1.05 In this respect, the Brecon Beacons National Park Authority (BBNPA), together with its partners and stakeholders across the private, public and voluntary sectors, has a sound track record in sustainable tourism development. There are numerous examples of strategic and local actions which exemplify collaboration and good practice including:

- Innovative visitor interpretation and management schemes;

- Community involvement;
- Market focused product development;
- Integrated approach to planning, land management, sustainable transport and information for visitors.

1.06 In addition, the recent designations of areas within the National Park as a UNESCO World Heritage Site centred on Blaenafon and the GEOPARK in the west of the Park will provide significant new opportunities for enhancing the visitor experience and growing new visitor markets.

(b) The National Park Authority and Tourism

1.07 The Brecon Beacons National Park Authority is charged with implementing the statutory requirements of the legislation. Primarily this focuses upon conserving and enhancing the special environment of the designated area in order to contribute to a better quality of life for all. Clearly tourism, when properly planned, managed and promoted, can contribute to these aims by providing opportunities for physical and psychological well-being, amenity, recreation and economic benefits. It can also potentially reward land managers who are sympathetic to the environment and present local communities with a reason to support conservation.

1.08 Tourism can be fundamentally important in helping the BBNPA develop understanding and awareness of the Park's special qualities. Visitors to the Park are often willing recipients of strong environmental messages when presented with different forms of interpretation and environmental education techniques. These in turn can influence their behaviour whilst still enabling enjoyment of the National Park.

1.09 Tourism is one of the foremost means of achieving fostering the social and economic wellbeing of local communities. In this context the benefits to communities from tourism include the fact that tourism ...

- ... boosts the economy by over £126 million per annum, creating wealth for local businesses and income for local residents;
- ... generates and supports year-round employment with over 2,900 direct and indirect FTE jobs in the National Park area;
- ... helps sustain local facilities and services keeping them viable and available for local people;
- ... creates positive images of the Park thus encouraging civic pride, creating awareness of special qualities and acknowledging sense of place;
- ... supports a better environment and encourages good environmental stewardship;
- ... pays its way inducing secondary spending throughout the community, as well as encouraging enterprise and innovation (indirect expenditure and VAT amounts to almost £50 million per annum).

- 1.10 Given that the primary appeal of the Brecon Beacons for day and staying tourists is the environment, especially the landscape (both cultural and natural) and its biodiversity. Careful management of this environment and the impact of tourism is, therefore, the key to a sustainable tourism economy.
- 1.11 The importance of a Sustainable Tourism Strategy for the BBNP is to ensure that there is an appropriate and systematic approach to marketing, product development and visitor management involving all key stakeholders. The Strategy is therefore based upon an integrated approach to developing tourism in a way that protects both the interests of the community and the environment.
- 1.12 Sustainable tourism development, according to the United Nations World Tourism Organization, is defined as: *“tourism which meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future”*. Without the support of the local community the potential benefits from tourism will not be fully realised. In rural areas the visitor experience is inextricably linked with people and places hence the importance of the full engagement of community groups in the tourism planning process in the Brecon Beacons.
- 1.13 For this to be achieved, sustainable tourism must be embedded in and mainstreamed within the philosophy and all activities of the BBNPA. This has to be reflected in the core strategic policies of the BBNPA as set out in the National Park Plan and the Development Planning documents. It also has to be evidenced in all aspects of the work of the BBNPA.
- 1.14 In recent years BBNPA has adopted a more proactive approach to sustainable tourism development. There has been a willingness to pilot and lead novel approaches to visitor management, landscape conservation and the engagement of communities and tourism enterprises.
- 1.15 BBNPA has a range of strong initiatives which contribute to the sustainable tourism approach as outlined in the context of the European Charter for Sustainable Tourism in Protected Areas. These projects are essential assets which demonstrate the commitment of BBNPA to deliver sustainable tourism outputs. These include:
- Local produce initiatives;
 - Tourism industry capacity building;
 - Promotion of good environmental standards in tourism businesses;
 - Action for Tourism newsletter;
 - Sustainable transport initiatives;
 - Community consultation and visitor satisfaction surveys;
 - Strong community sectors;
 - Promotion of natural heritage assets;

- Coordinated approach to activity tourism marketing and product development.
- 1.16 These specific programmes have been underpinned by the key appointment of dedicated tourism officers, the establishment of the Strategic Tourism Partnership and the strong support of Tourism Partnership Mid Wales. These are essential building blocks for the success of the future Strategy.

(c) The Need for a Strategy

- 1.17 A Strategy is needed to provide a framework within which the Brecon Beacons National Park Authority and its partners, both public and private sector, can collaborate to ensure the successful development and management of sustainable tourism and of the visitor experience in the Park over the next five years and beyond.
- 1.18 Sustainability is the key principle of BBNPA's work. This is clearly reflected in the '*National Park Management Plan 2000 – 2005*' and in all aspects of the NPA's approach to planning and development.
- 1.19 Sustainable tourism takes into account the needs of visitors, tourism enterprises, the environment and the host communities when planning, in an integrated way, the development, marketing and management of tourism in the Park. This is a continual and ongoing process and requires BBNPA to carefully monitor the impacts of tourism against an agreed range of sustainable indicators.
- 1.20 This Sustainable Tourism Strategy has to fit alongside and within a hierarchy of national and regional tourism strategies, as well as with plans and policies for economic development, environmental management and cultural renaissance.
- 1.21 The National Park Authority has agreed to apply for accreditation by the EUROPARC Federation in 2007 under its European Charter for Sustainable Tourism in Protected Areas. This Charter aims to encourage good practice, recognising parks which are meeting agreed criteria for the sustainable development and management of tourism.
- 1.22 The EUROPARC Federation is an association of over 500 protected areas in some 40 countries. Any protected area can apply for recognition that they meet the requirements of the Charter and by the end of 2005 30 protected areas across Europe had achieved this status. There have been five submitted so far in 2006 and six to be submitted in 2007. The preparation of the Sustainable Tourism Strategy and Action Plan is one of the key requirements of the Charter.

(d) A Partnership Approach

- 1.23 This is primarily a strategy for the area designated as a National Park. However, this cannot be delivered in isolation of tourism activity across a wider area of influence. The specific geography of the Park's boundaries has little direct bearing on either the visitor experience or their perceptions of the destination. Consequently, it is essential that tourism and product development in particular is closely integrated across the Park boundary. A map in Appendix 2 shows the extent of the 'tourism destination' working area.

- 1.24 There are numerous public bodies, together with over 800 private and voluntary enterprises, involved in tourism in the Park and the adjacent areas. These organisations are the key partners who will be involved in the delivery of this strategy and its Action Plan. All of these partners have been involved in the preparation of this strategy through consultations, workshops and seminars.
- 1.25 There are existing structures that bring these bodies together to plan the detail of the strategy and its implementation. These structures need to be strengthened and extended to encourage wider ownership, buy in and a closer integration of policy and resource allocation. The strategy sets out how this can be achieved.

(e) The National Park – An Overview

- 1.26 As an administrative area the Brecon Beacons National Park embraces parts of nine of Wales' 22 local authorities in its 519 square miles (1,344 square kilometres). The largest areas of land and population are in the local authorities of Powys, Carmarthenshire and Monmouthshire¹. The National Park Authority is the planning authority for the National Park with the constituent local authorities retaining responsibility for all other local government services.
- 1.27 BBNPA works closely in partnership with these authorities who all (except those with no population in the Park) appoint Members to serve on the Authority. The unitary authorities are also part of the Strategic Tourism Partnership established by the BBNPA in 2002.
- 1.28 The Park is a diverse landscape with sweeping uplands characterised by their north and north-east facing escarpments contrasting with the broad valley of the Usk which slices through the mountains and the valleys of the Tywi and Wye which border the Park.
- 1.29 In landscape terms the Park is the transition between Mid Wales and industrialised South Wales. It includes the Black Mountains in the east, the Brecon Beacons in the centre and Y Mynydd Du (the Black Mountain) in the west.
- 1.30 The Old Red Sandstone Devonian rocks create the escarpments and the highest peaks (including Pen-y-Fan at 886m) of The Great Forest, Brecon Beacons, The Black Mountains and Y Mynydd Du. Older Ordovician and Silurian rocks create the landscape of south west / northeast ridges and valleys of the north west of the Park.
- 1.31 In the south of the Park the Carboniferous rocks create a distinctive limestone landscape of escarpments, waterfalls and cave systems of European

¹

Unitary Authority	Area in Nat Park	% of NP Population
Powys	66.1	70.0
Carmarthenshire	16.7	5.0
Monmouthshire	11.1	21.0
Rhondda Cynon Taff	3.9	3.0
Merthyr Tydfil	1.8	1.0
Blaenau Gwent	0.2	0.1
Torfaen	0.1	0.1
Neath Port Talbot	negligible	0.0
Caerphilly	negligible	0.0

significance. These rocks then give way to the plateaux, scarps and ridges that are the northern rim of the South Wales Coalfield.

- 1.32 On 5 October 2005 the European / UNESCO Geopark Network announced that The Great Forest (Fforest Fawr) would become part of its Geopark network comprising 24 members and this being the first Geopark in Wales, as well as the first National Park in the UK with this designation. The designated area incorporates the whole of the western half of the National Park embracing the Old Red Sandstone, Carboniferous Limestone and Millstone Grit landscapes.
- 1.33 Designation of the Geo Park provides BBNPA and its partners with an unparalleled opportunity to create a fresh range of sustainable tourism products in its less developed western area that builds upon best practice elsewhere in Europe. It is vital that this work is integrated with this strategy and that it is both market led and customer focused.
- 1.34 Within the National Park there is a rich biodiversity of upland heaths, bogs and unimproved grassland with ancient woodlands and hay meadows, alongside modern forestry plantations and improved land. It is estimated that 90% of the Park area is used for agricultural purposes (including the upland commons primarily used for the grazing of sheep). There are 78 SSSIs in the Park covering 27,000 hectares, of which 19 are geological and 58 are solely biological.
- 1.35 Just under a quarter of the land in the Park is owned by public agencies, the largest being the BBNPA whose 19,791 hectares comprise mainly upland common land. Over three quarters of the land is owned by estates and family farms, householders or private institutions (see Table 1.1). Following the Countryside and Rights of Way Act 2000 it is estimated by the BBNPA that 47% of the Park (62,861 hectares) is accessible (*de jure*) to the public with an estimated 63% of all Public Rights of Way being easy to use.

Table 1.1: Land Ownership – Brecon Beacons National Park

	Area Owned (ha)	% Park
(a) Public Sector		
1. BBNPA	19,791	14.3
2. FC	6,401	4.8
3. Dwr Cymru	5,197	3.9
4. CCW	1,049	0.8
Sub Total	32,438	23.8
(b) Private Sector		
1. National Trust	4,942	3.7
2. Other	97,220	72.5
Total	134,600	100.0

- 1.36 Across the Park evidence of the overlays of human influence, culture and economic activity can be seen including Neolithic and Iron Age sites, Roman

roads, Norman castles, historic field patterns, disused quarries and ironworks, managed woodlands, former railways, canals and reservoirs. There are some 270 scheduled ancient monuments.

- 1.37 The Park has a resident population of 33,300 with the largest settlement being the Cathedral town of Brecon (pop 7,500). Brecon's origins date back to the 5th Century and it thrived during the mediaeval period. Today it is an important administrative and garrison centre with a strong identity as an attractive market town. The town's Annual Jazz Festival and growing reputation as a centre for arts and crafts gives it a central role in developing the area's tourism potential.
- 1.38 Approximately two thirds of the population is economically active and unemployment stands at 2.7%. There is a relatively high level of self employment (15.2% of the economically active) in the Park and 16% of the population is retired. According to the 2001 census, some 16% (5,280) of the resident population speak Welsh.
- 1.39 In recent years the National Park Authority has recognised that tourists and day visitors engage in activities which extend beyond and involve areas beyond the administrative boundary of the Park. The BBNPA has, therefore, established a partnership approach with public and voluntary organisations and private sector enterprises across a wider area.
- 1.40 This approach has effectively ensured the integration of strategies and policies, as well as ensuring that initiatives are not artificially constrained by political or administrative boundaries.
- 1.41 Consequently, many of the BBNPA's tourism strategies/action plans (including those for interpretation, education, walking, cycling and equestrian activities) embrace this wider Brecon Beacons National Park Area². These strategies all have a focused approach that has established an Action Plan which has guided implementation over the past five years. As a result, much has been achieved in terms of route development and growing the infrastructure for these activities.

(f) Preparing the Strategy for 2007 - 2011

- 1.42 The Strategy is based upon opinion gained from a process of local consultations, together with a thorough review of relevant, local, regional and national reports and surveys. The key stages in this process included:
- A series of site visits;
 - Meetings and workshops with National Park staff and members;
 - Meetings / consultations with individuals and organisations;
 - A postal survey of tourism enterprises within and around the National Park to enquire about key issues, opportunities and trends;
 - A series of six area-based workshops for tourism operators and local community representatives attended by a total of 34 people;

² In practical terms this is defined by post codes. See map in Appendix 2.

- A series of workshops for public sector policy makers and private sector land managers;
- Workshops with the Strategic Tourism Partnership to discuss issues and international best practice;
- Discussion of a key issues paper;
- Convening an '*Expert Panel*' visit to the Park in July 2006 in order to raise awareness and understanding of the Charter process;
- Production of a Draft Strategy and its distribution for consultation;
- A review of studies and reports of international best practice in tourism in protected areas;
- Reviewing a number of case studies;
- Workshops with representatives of the various tourism partnerships.
- A workshop attended by 45 stakeholders from public, private, conservation, community and other bodies was held to discuss the Draft Strategy in January 2007
- A consultation letter was sent to 900 tourism businesses and partners as well as all community councils, 100 NPA staff, 24 NPA members and around 100 stakeholders. This invited stakeholders to the workshop above and referred readers to the draft strategy and its summary, available on the website.

(g) European Charter for Sustainable Tourism in Protected Areas

1.43 The underlying aims of the European Charter are:

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

1.44 The Charter also identifies ten principles to underpin these aims. They are to:

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
- 1.45 The Charter provides an opportunity for the BBNPA to align its tourism policies and actions with current thinking and best practice. As a result, there are a number of key benefits of adopting the Charter and going through the Charter process. They are:
- Providing the basis for strengthening relationships amongst all of those involved in tourism in and around the designated National Park area;
 - Raising the profile of the Park and of sustainable tourism development;
 - Influencing tourism development such that products are aligned to both market demand and environmental considerations;
 - Providing processes and procedures giving an objective assessment of the development of the Strategy;
 - Networking with other parks, allowing an exchange of information, expertise and comparative benchmarking.

(h) The Policy Context

- 1.46 The Welsh Assembly Government (WAG) has a clear commitment to the principles of sustainable development³. This is to be achieved through a partnership approach involving all sectors and communities as set out in *Wales: A Better Country* (2003), the overarching strategic document of WAG. Sustainable tourism development within the national parks must clearly integrate relevant targets from other WAG strategy documents. This document aims to make Wales a fairer, more prosperous, healthier and better-educated Country. It recognises the need to develop competitive strengths, together with emphasising the importance of the natural and cultural environment for tourism.
- 1.47 'A *Winning Wales*' is the WAG's National Economic Development Strategy designed to achieve the vision of a: "*prosperous Welsh economy that is dynamic, inclusive and sustainable, based on successful, innovative businesses with highly skilled, well-motivated people*". Within *A Winning Wales* tourism's role is

³ Section 121 of the Government of Wales Act (1999) places a duty on the National Assembly for Wales to promote sustainable development.

highlighted within three key themes based on innovation, skills development, quality and sustainability:

- Supporting rural Wales;
- Establishing Wales in the world;
- Setting a fresh directions.

1.48 These are key challenges for the future of tourism in the Brecon Beacons National Park. Tourism in the National Park is central to achieving the goals of *A Winning Wales* in Mid Wales. It foresees the development of Wales' green economy and recognises that the environment is **in every sense an asset**. It wishes to **strengthen the contribution of tourism to the rural economy by stimulating investment, promoting investment and encouraging IQM initiatives**.

1.49 Early in 2006 *A Winning Wales* was refreshed with *Wales: A Vibrant Economy* which envisions a vibrant Welsh economy capable of delivering strong and sustainable economic growth by providing opportunities for all. The priorities are to:

- Increase employment;
- Invest in deprived communities;
- Help businesses to grow;
- Support sustainable development.

1.50 The priorities and actions for tourism complement and support the Assembly Government's economic development priorities⁴ of:

- Job creation;
- Skill development;
- Increasing value added per job;
- Innovation;
- Investment;
- Sustainable growth.

1.51 There are a number of other key WAG strategies which sustainable tourism development in the National Park must support. They are:

- (i) '*Learning to Live Differently – The Sustainable Development Scheme*' which sets out the need for a sustainable approach to tourism as required by Section 121 of the Government of Wales Act 1998. Tourism promotion must

⁴ This is supported by the WAG: Innovation Action Plan, Entrepreneurship Action Plan, Skills and Employment Action Plan and Cymru Ar-leih.

stress Wales' quality and distinctiveness and an integrated approach to tourism development;

- (ii) '*Making the Connections*' which emphasises the need for a more customer facing and accountable public sector in Wales;
 - (iii) '*Farming for the Future*' which identifies the need for further diversification to ensure the management of landscape, the maintenance of farm incomes and enhanced stewardship of the environment;
 - (iv) '*Iaith Pawb*' which seeks to establish Wales as a bilingual country and that for many Welsh speaking communities tourism is a vital activity;
 - (v) '*Creative Futures – Cymru Creadigol*' sees culture as a springboard for developing a strong economy and tourism industry. This is supported by the WTB's Cultural Tourism Strategy (2003).
- 1.52 '*Winning Mid Wales: A Framework for Strategic Action*' is a particularly important document because such a large proportion of the National Park is within the Mid Wales Region. It has been prepared by the Mid Wales Partnership and is the overarching strategic framework for economic growth in Mid Wales.
- 1.53 This economic strategy highlights the importance of outdoor activities, heritage and culture, along with the need to grow niche markets and invest in quality tourism products. It embraces the Mid Wales Tourism Strategy by endorsing the strategic imperatives of:
- Product : market combinations;
 - Customer-focused branding and marketing;
 - Celebrating and growing excellence;
 - Improving access to bookings and to products;
 - Ensuring excellence in data collection;
 - Developing partnerships.
- 1.54 It is vital that sustainable tourism must also contribute to the purposes of national park designation as set out in the National Parks and Access to the Countryside Act 1949, as amended by the Environment Act 1995, and to the *Principles for Tourism in Protected Areas* compiled by the Wales Tourist Board and the Countryside Council for Wales in 1991 and reissued in 2004.
- 1.55 *Wales: A Better Country* refers to a number of sub-strategy documents which provide a vital policy context for the development of sustainable tourism development in the national parks. These include:
- *Achieving Our Potential*, the national tourism strategy for Wales, prepared by the Wales Tourist Board and originally approved by the Assembly in 2000. This strategy has recently undergone a mid-term review and a revised document detailing the national tourism strategy for the period 2006 – 2013 has been approved by the Assembly in May 2006. *Achieving Our Potential*

is supported by a number of strategies for specific market and product development which are relevant to sustainable tourism in protected areas. They relate to:

- Walking
 - Cycling
 - Adventure activities
 - Fishing
 - Equestrian
 - Water sports
 - Culture
 - Sense of place
 - The countryside experience;
- *Climbing Higher: A Strategy for Sport and Active Recreation in Wales*, produced by the Sports Council for Wales. This highlights the link between good health and moderate exercise. A key aim is to get more people in Wales using the natural environment for outdoor activities from 36% to 60% by 2023. The 2004 WTB *Sports Tourism in Wales: A Framework for Action* develops this objective.

1.56 *Achieving Our Potential 2006 – 2013 Mid Term Review* (2006) opens by reaffirming that visitors to Wales **continue to be attracted by the rich heritage and culture, a landscape of high scenic quality and a diversity of unique experiences**. The review recognises that tourism demand is volatile and influenced by a complex range of external factors. It acknowledges the importance of market-led, customer focused, investment. It records the high levels of investment in the tourism industry in Wales in the period 2000 – 2005 fuelled by access to Objective One funding in particular, together with more effective working relationships being established at all levels between the private and public sectors in Wales.

1.57 As a result of these changes the Mid Term Review has modified *Achieving Our Potential's* original vision for tourism in Wales such that it now reads:

“... a customer responsive, innovative, sustainable and profitable industry which makes an increasing contribution to the economic, social, cultural and environmental well-being of Wales”.

1.58 This revised vision is based upon four strategic aims designed to achieve long-term prosperity for the industry:

1. Realising the importance of understanding and responding to customer needs.
2. Accepting that there is a value to be gained in doing things differently from our competitors through innovative ways of working.
3. Acknowledging the need to secure a sustainable, long-term future through responsible destination and business management.

4. Seeking to maximise business profitability to drive growth in the tourism economy.

1.59 In short, the revised vision accepts that economic prosperity in tourism will be generated predominantly in the private sector but that competitive pressures will require the emergence of a more professional, environmentally aware, market facing industry entirely wedded to the principles of sustainable tourism development.

1.60 *Achieving our Potential* established four Regional Tourism Partnerships (RTPs) in Wales, three of which cover areas within the Brecon Beacons: Capital Region, Mid Wales and South West Wales. RTPs are expected to act as lead bodies in terms of:

- Branding
- Quality
- Access
- Developing skills
- Creating and working in partnerships.

1.61 Each RTP has its own strategy as follows:

(i) Tourism Partnership Mid Wales' original Strategy, *Naturally Different*, was published in 1999. In August 2003 the *Mid Wales Tourism Strategy Review* was published that builds upon the initial strategy. In this revised strategy the Vision has been refocused to: *a competitive market-led industry that contributes to the region's economy and sustains its communities, culture and environment*. In this context the strategic imperatives have been established as:

- Increasing contribution tourism makes to communities;
- Greater customer focus with better market research;
- Achieving excellence and improving quality;
- Developing partnerships and networks.

Seven programmes have been identified which highlight the real opportunities for growth. These include:

1. Product / market combinations to develop outdoor activities in countryside settings, strong heritage and cultural themes and distinct Welsh experiences;
2. Attract and disperse policies using iconic brands;
3. Tactical marketing in association with VisitWales;
4. Developing tourism networks, partnerships and clusters;

5. Improving access for visitors to the product through enhanced information and bookability;
6. Investing in market research;
7. Improving communications and stakeholder involvement.

The Strategy prioritises actions which develop the countryside experience using iconic brands including the Brecon Beacons with the experiences offered to be based upon quality environment with excellent visitor attractions, outdoor activities, quality accommodation and rural dining out.

- (ii) The *South East Wales Tourism Action Plan* by Capital Region Tourism (August 2003) and the associated (Final) *Revised Tourism Strategy for South East Wales* brings up to date the original 1999 Strategy, *Competing with Confidence*. The strategic vision is '*for the Region to be a leading short break leisure destination ... positioned as the essential gateway to Wales featuring the vibrant capital, cultural and sporting opportunities based upon the coast, mountains, valleys and vales ... at the same time it will be developed as a major destination based upon business tourism*'.

This vision clearly links the urban proposition with the rural, including access to the Brecon Beacons. The Strategy, therefore, focuses upon cohesion and partnership working with Capital Region Tourism being the strategy facilitator working with the National Park Authority and other tourism networks.

This Strategy '*Competing with Confidence*' emphasises the importance of developing urban and business tourism, cultural and heritage products, as well as golf and luxury short breaks. The aim is to make the region a leading short break destination embracing the potential offered by activities undertaken in the Brecon Beacons and elsewhere.

The emphasis in this Strategy is geared to generating more business outside the main summer season and the attraction of higher spending / higher value markets. The heritage and cultural product, along with the environment and outdoor activities, as well as food and drink, are critical success factors.

- (iii) The *South West Wales Tourism Partnership Strategy for 2004 – 2008* is *Open All Year*. It, again, emphasises the need for closer partnership working throughout the industry and the constant need for improved market research.

The region's strengths are identified as its high quality countryside and coast and the proximity to both day and staying visitor markets. The weaknesses focus on the need for enhanced quality, stronger sense of place and the scope for growing year round leisure and business tourism. As a result, the vision is to make the region '*a premier, all year, accessible UK domestic destination that provides high quality products and offers special and distinctive experiences with an industry willing to invest in quality staff and facilities ...*'.

The strategic approach is to capitalise on the region's unique environmental and cultural strengths, supported by new marketing initiatives and working together with geared at target markets. There are five strategic objectives in support of this approach:

1. Quality market research;
2. Off peak marketing initiatives;
3. Enhancing quality;
4. Responsible management of the culture and environment;
5. Improving business practice.

The original vision was revised in 2003 to be ... *'a competitive, market led, tourism industry that contributes to the region's economy and sustains its communities, culture and environment'*.

- 1.62 *Achieving Our Potential* also introduced a programme of Tourism Growth Areas (TGAs) in 2000. These initiatives accessed WTB capital funding for a programme of investment agreed in advance with the WTB.
- 1.63 The Brecon Beacons area benefited significantly from TGA status with its own programme supplemented by an officer. This has concentrated on activity tourism; signage with community engagement and developing the food/drink product have been the key focus in this programme. A capital investment of over £0.5 million has achieved considerable leverage and progress in growing activity tourism business in particular. In addition other TGAs have overlapped and contributed to the BBNP product. Tywi Valley and Monmouthshire TGAs have focused on community and activity tourism whilst South Wales has focused upon developing the industrial heritage appeal and infrastructure of the area.
- 1.64 The Brecon Beacons National Park area includes land within nine local authorities. WAG, through *Leading Reform in Local Services: Manifesto for Welsh Local Government 2006 – 2008*, has two key aims of relevance to tourism (i) improving the quality of the local environment and (ii) developing prosperous and vibrant communities.
- 1.65 The Wales Spatial Plan, *'People, Places, Futures'* (November 2004) sets out how different parts of Wales develop policies to meet the challenges and opportunities for their areas for the next 20 years. This will guide political and financial interventions by the Welsh Assembly Government and its agencies, local authorities and other WAG-sponsored bodies. It contains a commitment to use distinctiveness and the natural environment to support a more sustainable tourism industry. The Spatial Plan is structured into five guiding themes:
- Building sustainable communities;
 - Promoting a sustainable economy;
 - Valuing our environment;
 - Achieving sustainable accessibility;

- Respecting distinctiveness.
- 1.66 Brecon Beacons National Park is primarily located within the region of ‘Central Wales’ in the Spatial Plan which, critically, highlights the importance of the environment as a key tourism asset. This is reflected in the Spatial Plan’s vision of ‘Central Wales’ as being:
- ‘High quality living and working in smaller scale settlements set with superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value added activities.’*
- 1.67 The Spatial Plan recognises the importance and potential for high quality tourism managed in a sustainable way but enhancing the quality of the visitor experience and extending the length of stay. The Plan is especially keen to support low impact innovative tourism projects.
- 1.68 The landuse and development planning framework within which these strategies have to be enacted is set out in *Planning Policy Wales* (March 2002) and supplementary planning guidance and relevant Technical Advisory Notes. With *Planning Policy Wales* the priorities for rural Wales within the Section *Planning for Sustainability* are to secure:
- Sustainable rural communities;
 - A thriving and diverse local economy where agricultural-related activities are complemented by sustainable tourism;
 - An attractive, ecologically rich and accessible countryside;
 - A positive approach to the conversion of rural buildings for business re-use.
- 1.69 There are a wide range of other strategic documents which relate to the way the nine local authorities, as well as other public bodies such as Cadw: Welsh Historic Monuments, discharge their statutory responsibilities. Many of these have been reviewed in preparing this strategy. The NPA has been or is fully engaged in the preparation and review of these policies and plans.

(i) Tourism in National Parks

- 1.70 National Parks are an internationally known brand closely associated with quality landscape, natural heritage and respect for local culture. They offer the potential to build a premium brand tourism product capable of providing a quality visitor experience to match that of its environmental qualities. Building a premium brand will enable operators to improve yields, thus increasing the profitability of their businesses.
- 1.71 The *Review of Welsh National Park Authorities* (2005) identifies key measures to improve the delivery of sustainable tourism. The Review emphasises the need to ensure that appropriate forms of tourism and recreation are encouraged. This focus has been welcomed by all three National Park Authorities.
- 1.72 *The National Parks in Wales Sustainable Tourism Initiative* (2005) sets out how this goal can be achieved so that they can become exemplars for sustainable

tourism in Wales. It is an initiative supported by all three Welsh parks: Brecon Beacons, Pembrokeshire and Snowdonia. There is growing interest in Wales for the potential for National Parks to become test beds for sustainable development. There is, therefore, a clear challenge for the Welsh national parks to pilot new initiatives in sustainable tourism development in the next five years.

1.73 The '*Sustainable Tourism Initiative*' for Wales' three national parks concludes that scope exists to develop initiatives which can help create parks as icons of sustainable tourism:

- Develop the brand position for Welsh parks within the UK national parks branding exercise
- Focusing upon the potential to become green destinations;
- Experimenting with innovative forms of interpretation;
- Sustainable transport initiatives;
- Wildlife tourism;
- Market research.

The National Park, its Tourism Economy and Tourism Infrastructure

(a) The Volume and Value of Tourism in the Brecon Beacons National Park – A Five Year Overview 2000 - 2004

- 2.01 The headline figures in 2004 for the area within the National Park boundary indicate that:
- Tourism spending totalled £126.3 million (or £4,000 per head of population living in the Park);
 - Day visitors contributed 61% of this total (£76.8 million) whilst contributing 82.5% of all visitor days;
 - Day visitor spend per head was £22.34;
 - There were 250,000 overnight tourist trips to the Park, of which 80% stayed in commercial accommodation and 17% (50,000 trips) with friends or relatives;
 - Serviced accommodation accounted for 72% of all tourist trips using commercial accommodation, 38% of all tourist days spent in the Park and 44% of all tourist spending;
 - The average length of stay for those using serviced accommodation in 2004 was 1.7 nights;
 - The average spend per head, per day for those using serviced accommodation was £89.30;
 - Non-serviced accommodation accounted for 38% of all tourist trips using commercial accommodation, 67% of all tourist days and 56% of all tourist spending;
 - The average length of stay for those using non-serviced accommodation in 2004 was 6.5 days;
 - The average spend per head per day for those using non-serviced accommodation was £61.85;
 - An estimated 2,371 FTE jobs are directly supported by tourism in the Park with a further 564 FTEs indirectly supported by tourism;

- The majority of direct jobs are in the accommodation sector (30%) and in the food / drink sector (29%);
- Of the £126.3 million spend by visitors in 2004, £86.3 million (68%) was derived from direct expenditure with £40 million (33%) being generated by VAT and indirect spending;
- The majority of direct (£86.3 million) spending occurred in food /drink sector (32%), retail sector (25%) and on transport (23%).

2.02 In terms of trend analysis, in the three years 2002 – 2004, the following key features emerge:

- The value of tourism has increased from £93.4 million to £126.3 million or £32.9 million or 32%, equivalent to 10.9% per annum or more than double the targets set for Wales in '*Achieving Our Potential*';
- The number of overnight tourist trips has increased from 227,000 in 2002 to 250,000 in 2004 – an increase of 23,000 or 10% - the equivalent of 3.3% per annum – a figure broadly in line with national targets;
- Day visitor numbers have increased by 450,000, an increase of 15%, with spending estimated to have increased at a similar level;
- In 2002 serviced accommodation accounted for 36% of all tourist days spent in the Park using commercial accommodation. By 2004 this had increased to 40%. This was as a result of more tourists using serviced accommodation and staying longer. They were also spending more per trip such that the relative value of the serviced sector to the tourism economy of the Park is increasing at the expense of the non-serviced sector;
- Total direct and indirect employment in tourism in the Park has increased by 208 (9.6%) over the period 2002 – 2004 with the largest increases being experienced in the food / drink and retail sectors;
- It would appear that the accommodation sector has increased its operational efficiency by handling increased levels of visitors whilst maintaining the same levels of employment;
- Employment growth appears to be closely related to growth in the day visitor markets;
- Spend per head, per day, in the National Park has decreased over the past three years so, despite getting more visitors in 2004, their spending in the Park is less than it was in 2002:

	2002	2004
Serviced	£91.24	£89.30
Non Serviced	£62.50	£61.80
Day Visitor	£25.73	£22.34

- Seasonality remains an issue in the National Park. It is less pronounced in the serviced sectors but for non-serviced accommodation and day visitors

there is significant peaking at Easter and between July and the end of August.

- 2.03 It is estimated that there are 309 accommodation providers in the National Park, offering over 1,900 rooms / pitches / units, with an overall capacity of 5,800 bedspaces.

Table 2.1: Distribution of Bedstock in the National Park 2004

	Establishments		Rooms/ Pitches/Units		Bedspaces	
	No	%	No	%	No	%
(a) Serviced						
50+ rooms	0	0%	0	0	0	0
11-50 rooms	18	5%	323	17%	642	11%
Under 10 rooms	146	47%	534	28%	1,144	20%
Sub Total	164	53%	857	45%	1,786	31%
(b) Non Serviced						
Self catering	108	35%	192	-	768	13%
Hostel type	15	5%	N/A	-	524	9%
Caravan / Camp Tour	19	6%	781	-	2,343	41%
Caravan / Camp Static	3	1%	87	-	348	6%
Sub Total	145	47%	1,060	-	3,983	69%
Total	309	100%	1,917	-	5,769	100%

Source: BBNPA, 2004

- 2.04 Table 2.1 shows that the majority of serviced accommodation is in small-scale units of less than ten rooms. There are only 18 establishments of 11 – 50 rooms and no hotels of more than 50 rooms.
- 2.05 Caravan and camping provision dominates the non-serviced sector accounting for over 2,600 of all bedspaces in the Park (47% of provision) provided by just 22 establishments (average size 40 units / 130 bedspaces).
- 2.06 For the serviced sector, the average year-round occupancy is 39%, with the larger establishments (11 – 50 rooms) doing marginally better than the smaller establishments. These figures show a year-on-year improvement and a significant uplift over the 2002 figures.
- 2.07 For the self-catering sector, occupancy in 2004 is 50% (year-round average), a marginal increase on 2002. Figures are not available for the caravan and camping sectors on a comparable basis.

Table 2.2: Occupancy Levels

	2002	2003	2004	2002-2004 +/-
(a) Serviced				
11-50 rooms	33.60%	41.24%	42.51%	+ 8.91%
Under 10 rooms	29.39%	28.82%	36.32%	+ 6.93%
All establishments	31.50%	35.03%	39.41%	+ 7.91%
(b) Self Catering	47.92%	45.29%	49.79%	+ 1.87%

Source: BBNPA, 2004

2.08 Analysis of the distribution of tourism enterprises in the BBNP area undertaken in 2004 by the Tourism Company revealed the following pattern⁵:

- Accommodation of all types is heavily concentrated in the eastern and north eastern parts of the Park with a limited provision distributed around the boundary of the Park;
- Self-catering accommodation is more widely dispersed than serviced accommodation and is to be found away from main routes in open countryside;
- Serviced accommodation is highly concentrated on three main corridors and in the key settlements in the east / north east of the Park:
 - Brecon – Hay
 - Brecon – Abergavenny
 - Sennybridge – Brecon
 - Brecon
 - Hay on Wye
 - Abergavenny
 - Crickhowell
- Operator run activity centres with on-site accommodation have a similar pattern to that for the serviced sector;
- Other forms of accommodation such as bunk houses, caravan and camping sites and youth hostels appear to be rather more dispersed;
- Food and drink establishments have a clear concentration in the east, especially in the Hay-Brecon-Abergavenny area, with a further band of places to eat and drink along the Park's southern edge;
- In terms of quality it is generally recognised that certain sectors (especially self catering, bunk house barns and caravan sites) have a high degree of

⁵ Walking Tourism Strategy 2004. A total of over 1,200 enterprises were mapped, based upon post code analysis of the BBNPA database, the Brecon Beacons Holiday Cottages database and the use of a commercial listing service for the food and drink sector.

consistency and strength, whilst concerns exist about the overall quality of the serviced sector;

- To date (early 2007) 68 enterprises in the area have signed up to the Wales Tourist Board's Green Dragon Standard.

(b) Survey of Current Tourist and Visitor Markets 2005

2.09 In 2005 Research and Marketing Ltd undertook a survey of over 1,000 visitors at seven locations⁶ across the National Park. The main conclusions were as follows:

- Overall the market is dominated by day visitors from Wales. However, most staying tourists are from S E England, S W England and the West Midlands;
- For over 92% the main influence on a decision to visit was scenery and peace and quiet;
- The overall profile is of an older visitor (35+) with a higher disposable income than the national average and who visit without children – only 30% of all visits are made in family groups with children;
- The primary motivation is to get away from it all to enjoy the landscape and scenery and for over 30% of all visitors it was their main motivation for a visit;
- Respondents were keen on walking both low level and hill walking but for the majority nothing over strenuous or overly active;
- An overriding theme is the desire to escape, recharge batteries and to engage in a range of things to do;
- There is a strong desire to try local food and drink. The survey suggests visitors are not particularly price sensitive and may be willing to pay a premium price for local produce;
- Respondents felt that there is scope to improve a number of aspects of the visitor experience within the area especially in terms of:
 - ❖ Creating distinctiveness / sense of place;
 - ❖ Information available;
 - ❖ Availability of public transport;
 - ❖ Value for money;
 - ❖ Car parking;
 - ❖ Local themed / way marked walks / routes;
- Most visitors recorded a high level of satisfaction and, as a result, word of mouth recommendation is a key to ongoing marketing and promotion;

⁶ Brecon, Crickhowell, Hay-on-Wye, Llandeilo, Llandovery, Storey Arms and Talybont.

- The average length of stay in the Brecon Beacons varies considerably across the Park from 5.7 nights in Brecon to 2.9 in Llandovery and 2.2 in Talybont;
- Visitors tend not to be widely dispersed across the Park. For example most visitors stayed in and around Brecon, Crickhowell and Hay-on-Wye;
- The main attractions are (in rank order):

❖ Hay bookshops	23%
❖ Brecon Canal	21%
❖ Cathedral / churches	19%
❖ Specific attractions	29%
❖ Local castles	11%
- The importance of retail and shopping is highlighted representing 52% of all main activities / interests undertaken on a visit with eating / drinking at 35% compared to visiting a heritage site at 18%;
- 68% engage in some form of walking;
- The area receives high levels of repeat visitation – 75% stating a willingness to return;
- The market highlighted the following aspects of their visit as good or excellent:

❖ Feeling of security and safety	97.2%
❖ Feeling of welcome	96.3%
❖ Quality of attraction	94.1%
❖ Helpful local people	93.3%
❖ Quality of local places to eat and drink	89.5%
❖ Quality of shopping	82.0%
- Further product development to create easier access to walking, cycling and horseriding opportunities would be well received by a significant number of visitors.

(c) The Day Visitor Market

- 2.10 A key issue for the Park is the management of the volume, distribution and patterns of behaviour of day visitors. The Brecon Beacons area and, especially, the National Park has traditionally been a popular day visitor destination for the urban-based population of South Wales, Avon, Hereford, Gloucestershire and, to a lesser extent, the West Midlands and the M4 corridor.
- 2.11 In 2004 day visitors totalled 3.4 million, representing 82.5% of all visitor days spent in the Park and 93% of all visitor trips. At the same time, this market contributes 61% of all visitor spending in the Park (average daily spend per head £22.34).

- 2.12 Over the period 2002-2004 the number of day visitors has increased year-on-year from 2,989,000 to 3,438,000 (an increase of 449,000 trips (15%) an annual growth rate of 5%) – a level greater than that pre foot and mouth disease in 2001. These recent trends show, however, that numbers are increasing by a higher percentage each year as the population becomes more mobile.
- 2.13 The day visitor market will always be dominant and important. The key issues to be addressed are:
- Encouraging day visitors to stay longer and spend more by improving quality and providing better information;
 - Converting day visitors to become overnight tourists;
 - Providing activities and events specifically targeting day visitors to introduce them to new activities;
 - Developing overnight packages such as:
 - Health-related activities;
 - Activity packages
 - Develop the guided walks and talks programme to make contact with and inform day visitors of the National Park's special qualities;
 - Continue to improve public transport provision / networks to encourage day visitors to shift away from the use of private cars;
 - Continue to increase physical linkages (trails, paths, etc) with adjacent communities outside the Park area.
- 2.14 Increasingly there is evidence to show that the day visitor is searching for similar opportunities to explore and discover special places in similar ways to the tourist. The challenge in this instance is, therefore, to provide these opportunities thus encouraging day visitors to stay longer, spend more money locally, understand the values of the Park and to convert to overnight stays.

(d) Visitor Attractions

- 2.15 The stock of visitor attractions in the Park is small in number, and limited in range and scale of visitation. Of the 12 attractions, eight are heritage based and three are environmental (natural) attractions. The majority are in public ownership and attract relatively low numbers of visitors.
- 2.16 The limited extent of visitation belies the fact that these attractions are highly relevant to the history, heritage and culture of the area. Their setting and location creates a strong sense of place.

Table 2.3: Visitor Attractions within the National Park

Attraction	Ownership	Type
1. Brecknock Museum and Art Gallery	LA	Museum
2. National Park Visitor Centre	BBNPA	V/C
3. Craig y Nos Country Park	BBNPA	C Park
4. National Show Caves	Private	Natural
5. Royal Regiment Museum	Private	Museum
6. Tretower Court / Castle	Cadw	Heritage
7. Carreg Cennen Castle	Cadw	Heritage
8. Sugar Loaf Vineyard	Private	Food / Drink
9. Brecon Mountain Railway	Private	Transport / Heritage
10. Llanthony Abbey	Cadw	Heritage

- 2.17 There is scope to encourage greater levels of visitation to these attractions thus contributing to the overall visitor experience and understanding of the Park. In addition, there are also significant attractions close to the National Park especially the World Heritage Site and the Big Pit Museum at Blaenafon, and both Aberglasney Gardens and the National Botanic Garden in the Tywi Valley.

(e) National Park Visitor Centre & Craig y Nos Country Park Centre

- 2.18 These are important facilities where the Authority has a direct interface with the visitor. The NPVC is the key focal point at the heart of the Park for visitor activities, information and National Park interpretation, whilst Craig y Nos Country Park is a 'honey pot' attraction in the Upper Swansea Valley.
- 2.19 In the 11-year period, 1993–2003, visitation peaked at 194,900 in 1999 (averaging 161,185 – excluding 2001 and foot / mouth disease). However, in the period 1997–2003 numbers declined by 80,240 or 42%. At Craig y Nos numbers peaked at 131,200 in 1996, rising from 87,650 in 1993 and declining to 80,000 in 2003 (average 83,700).
- 2.20 These are important, strategically located facilities that provide an important interface between the BBNPA and visitors to the Park. There is a need, however, to review their function in light of market trends and emerging initiatives.
- 2.21 For example, Craig y Nos Country Park is well located to play a pivotal role in the management of visitors within the Geo Park, whilst the NPVC's location allows it to act as a hub for visitor orientation and interpretation. The successful tearooms here potentially enables it to play a central role in the Brecon Beacons 'food story', a narrative that should embrace landscape and land management.
- 2.22 The BBNPA is fully aware of the need to review and refresh these two facilities and to allow them to play a more central role within the development of tourism over the next ten years.

(f) Outdoor Activities

2.23 The most recent analysis of outdoor activity provision in the Brecon Beacons was undertaken in 2002⁷. This has subsequently been extended as a result of specific strategies being prepared for cycling and walking. Horse riding is being developed under an action plan. Adventure activities, fishing, golf, watersports & air sports and wildlife tourism have not yet been prioritised for specific actions. New strategies or action plans should be developed for those areas on a prioritised basis within the context of regional priorities.

- (a) **Adventure activities**, especially climbing and caving are established in the Park. These are well represented minority activities and several activity tourism businesses are well established and introduce many visitors new to these experiences.

Climbing depends upon access to natural crags, as well as disused quarries. Dinas Rock and Llangattock Hillside are key sites and at the latter site a Code of Conduct has been established to protect conservation and landowner interests. Caving uses some of the most important and extensive caving systems in Europe. Although primarily undertaken by experienced cavers, there are opportunities for novices through the Caving Clubs and the general public to access an underground experience at the National Show Caves of Wales. In the eastern section there are other cave systems of note on the Llangattock Escarpment and in the Clydach Gorge.

Gorge scrambling is practiced particularly in the Waterfalls Area where there is significant ecological interest. NPA Ecology staff are liaising with operators with a view to generating a Code of Conduct.

The activity offer also includes canoeing, mountain biking, artificial climbing walls, high level rope courses and a wide range of other activities (archery, clay shooting, team building games, etc). There are important opportunities for both climbing and caving associated with the Geopark.

The majority of outdoor activity provision in the Park is provided by multi-activity centres in both the public and private sectors, including some clear market leaders, of which 15 exist within the Park, including those which offer instruction to both experienced participants and those wanting to '*dabble*' or '*sample*' an activity.

Increasingly the local authority multi-activity centres, which traditionally have provided both residential and day visit experiences for young people, are opening up to wider markets. This presents significant opportunities to grow the activity market, strengthen the cluster of activity provision and introduce more young people to outdoor and adventure activities.

Beacons Active is an association representing a range of activity providers and is attempting to coordinate this sector and has coordinated action on Codes of Conduct. Beacons Active represents exactly the type of sectoral interest group which should be supported as one of the main vehicles for stakeholder engagement and communication.

⁷ The *Brecon Beacons Activities Tourism Study* by Tabiner Kent Ltd (April 2002).

There are a total of 23 activity centres in the Park licensed by the Adventure Activities Licensing Authority, giving them the ability to give instruction to young persons for a range of activities. There are a further 14 providers in the wider area who are also licensed and extensively use the Park. In addition, there are some 28 licensed centres across mid/south Wales who frequently use the Park as a resource for outdoor activities.

It is difficult to estimate the level of use of the Park by non-licensed providers. This includes adult only, voluntary associations, Crown organisations and school groups. It is suggested that this sector of users is significant, unmonitored and in need of further research. The key issues associated with the current use of the Park for these adventure activities include:

- Accidents and over use of Dinas Rock and Bridge Cave;
- Security of vehicles in car parks;
- Conservation and environmental impact of new activities (particularly gorge scrambling);
- Shortage of qualified instructors.

(b) **Fishing** resources in the Park include:

- Salmon and trout fisheries of the Rivers Tywi, Wye and Usk and their tributaries;
- Coarse fishing at Llangorse, the Brecon and Monmouthshire Canal and numerous reservoirs including:
 - ❖ Brecon Reservoir
 - ❖ Dol-y-Gaer Reservoir
 - ❖ Pontiscill Reservoir

The VisitWales' fishing strategy concluded that there was relatively little scope to grow the tourism base for coarse fishing in Wales and that the game fisheries had little spare capacity. However a number of initiatives are being taken in specific local locations and the National Parks in Wales have been identified as providing a key resource. These opportunities should be explored in association with the VisitWales/Environment Agency and should recognise the growing niche markets within angling of increased demand by women and of holiday packages based upon an entire 'fishing experience for novices'. The sensitivity of the Usk and Wye Rivers should be taken into account as both are SACs.

There is an immediate opportunity to develop an information pack on Fishing in cooperation with Visit Wales & the Environment Agency.

(c) **Golf** – There are seven golf courses situated within the National Park, together with a further nine within closely proximity. Wales Tourist Board's Golf Strategy aims to harness the potential of golf tourism in the build up to the Ryder Cup in 2012. This is being coordinated at the regional level by Tourism Partnership Mid Wales and should involve those clubs which meet the governing body guidelines set by the Royal and Ancient, which are open and accessible to visitors and who can be encouraged to become part of an environmental accreditation scheme. Eventually participating clubs could be

encouraged to become part of the European Federation for Golf and the Environment's accreditation scheme.

- (d) **Water Sports and Air Sports** have not been prioritised for coordinated investment to date. The use of non-powered craft for hang gliding, para gliding and ballooning does create a broader range of activities each with a niche market potential. There are eight existing local providers using the Park for these activities. These are low volume and appear to create little in the way of negative environmental impact. A range of water sports (sailing, canoeing and wind surfing) currently take place in the Park, together with canal cruising. Provision is made by five operators in the Park area. The Rivers Wye and Usk are popular with canoeists and there are issues associated with fishermen and riparian owners. Sailing / wind surfing is restricted to Llangorse Lake and Pontisill Reservoir. The recreation / conservation scheme at Llangorse Lake is an excepted example of good practice.
- (e) **Wildlife Tourism** – developing wildlife tourism makes sense for a number of reasons:
- (i) there is evidence of increasing market demand from visitors want to explore the environment in more detail;
 - (ii) the markets include those with a deep interest, as well as browsers and novices;
 - (iii) this activity is entirely consistent with the aims and objectives of the BBNPA;
 - (iv) it will generate significant opportunities for enterprise development and innovative approaches to interpretation and environmental education.

There need to be a review of market demand and market trends. This market has not been explored in any depth in Wales and, therefore, not prioritised by VisitWales. There is scope for Tourism Partnership Mid Wales to commission a review of this potential at the regional level with particular emphasis on the opportunities created by and within the National Park and involve key stakeholders from all sectors.

BBNPA should convene a meeting of wildlife conservation interests, landowners and businesses interested in wildlife. The Park's Wardens also needs to be involved. The purpose of this initial meeting would be to:

- Identify current levels of provision;
- Highlight opportunities and concerns;
- Examine trends and demand amongst existing Park visitors;
- Scope out the contents of a wider study.

(g) Cycling

2.24 In 2001 the BBNPA adopted a Cycling Strategy aimed at making the National Park a “*welcoming, attractive place where the visitor and the resident can cycle safely, for social, utility and casual recreational purposes amid spectacular scenery*”. The strategy highlighted the need to implement a series of projects based upon:

- The development of cycle tourism products for four key markets:
 - ❖ family cyclists
 - ❖ short break package holidays
 - ❖ cycle tourers
 - ❖ mountain bikers;
- Promoting economic regeneration by encouraging businesses and communities to develop products to match the needs of these markets;
- Creating a network of routes that will target these markets;
- Developing support facilities;
- Improving the quality of information for cyclists;
- Improving the integration between public transport and cycling routes.

This strategy is entirely complementary with the national cycle tourism Strategy produced by the Wales Tourist Board⁸. It also directly relates to and integrates with the strategies of neighbouring local authorities, Sustrans and others.

Over the past five years the BBNPA, in collaboration with its partners, has implemented many aspects of this Strategy. As a result, there is now a significantly enhanced infrastructure of cycling routes addressing the needs of the four key markets. This implementation programme remains a key aspect of product development and, as a result, continues to need resource allocation and prioritisation.

(h) Horse Riding

2.25 BBNP is a natural area in which to develop horse riding with good bridleways and relatively relaxed slopes appropriate for both novice and more expert riders. There is a good distribution of horse riding businesses who already work closely with the NPA over route selection and management but who also are keen to receive training in the special qualities of the National Park in order to interpret the landscape to their clients – particularly the novice pony trekers.

2.26 Key priorities within the Action Plan include:

- Promotion of the long distance Three Rivers Ride

⁸ Moving Up a Gear 2000 – 2007 (2000), WTB.

- Development and publicizing of new routes in collaboration with trade, local communities and conservation interests
- Promotion of BBNP as 'riding resort' especially through www.horseridingbreconbeacons.com
- Development of a riding business cluster group to include accommodation interests

(i) Access and Walking

2.27 Brecon Beacons National Park has a high level of provision of publicly accessible paths and tracks (3,848 km) and 800 sq km of open access. This creates opportunities for the Park to become one of the most important walking destinations in the UK. BBNPA's '*Walking Tourism Strategy*' identifies the varied and extensive walking resource as being especially good for those markets which are well prepared for countryside walking and highlights the potential to broaden the market base by developing:

- Better information for visitors;
- Target marketing to key market segments;
- Comprehensive product development.

2.28 The priority market segments are agreed as follows:

(A) Primary Markets	(B) Secondary Markets
<ul style="list-style-type: none"> ➤ Independent, centre based, walking holiday and break takers; ➤ Primary holiday walkers; ➤ Incidental holiday walkers; ➤ Independent hill walking break takers. 	<ul style="list-style-type: none"> ➤ Packaged walking holiday takers; ➤ Group walking; ➤ Primary walking day visitors.

2.29 The objectives for walking tourism aim to develop a high quality and environmentally robust infrastructure that provides an excellent walking experience resulting in increased first time, repeat and recommended visits on a year-round basis and maximising use of local facilities and services. This is supported by a comprehensive Action Plan which builds upon the existing initiatives which have taken place and aims to capture the 3.5% growth per annum predicted in demand for walking tourism.

2.30 The importance of walking tourism is already well recognised by tourism enterprises across the National Park with many developing products specifically aimed at these markets. This has been in line with the Wales Tourist Board's market analysis as set out in the Strategy '*Best Foot Forward*' (May 2002). This document puts the value of walking tourism in Wales as in excess of £550 million with over 74% of all UK holiday trips involving walking as a main or important part of the holiday. Estimates suggest that walking tourism in the BBNP is worth in the order of £50 million per annum.

- 2.31 The Walking Tourism Strategy has influenced and was influenced by both the Rights of Way Improvement Plan and the Upland Erosion Strategy. These are key documents in managing access – the first in the lowlands, the second on upland open access areas – and a reciprocal relationship between the two processes will enable routes to be developed and promoted that are appropriate within ecological and community constraints. A specific checklist based approach for ensuring that new routes do not impact on the National Park’s special qualities is being drawn up.

(j) Summary

- 2.32 Tourism is one of the main drivers of the economy of the Brecon Beacons National Park and the surrounding areas. The designated area of the National Park is part of a wider area of tourism and day visitor activity but includes key centres and locations where visitors concentrate.
- 2.33 The National Park is well placed in terms of its access to markets and its product base to appeal to those markets which are in growth and are seeking quality, natural environments within which they can undertake a range of outdoor and cultural activities. The challenge for the NPA and its partners is to develop, market and manage these opportunities to capture the most benefit for the area.

Assessment, Analysis and Market Opportunities

(a) Evaluating the Brecon Beacons National Park as a Destination

- 3.01 During the process of consulting with the Partnership, members were invited to complete a 'Destination Competitiveness Evaluation' Survey. This is based upon the Hudson / S & A Model⁹ which has been successfully used to compare and benchmark international mountain destinations in Europe, North America and Australia. The Model is based upon an evaluation of 52 features of the destination capable of giving a total potential score of 198. Seven stakeholders from the Partnership completed the evaluation survey. Their average total score was 93.0 with a mean of 2.8. In an international benchmarking study of 15 destinations in six countries the lowest total score achieved by a destination was 123.5.
- 3.02 Analysis of the different features evaluated in this process using the Hudson / S & A Model reveals that stakeholders score the Park positively in terms of the following criteria, which relate to the core product and its image:
- Location and setting;
 - Interdependencies with other destinations;
 - Safety and security;
 - Brand awareness;
 - Cost and value;
 - Marketing;
 - Human resource development;
 - Activity mix and availability;
 - Special events;
 - Infrastructure;
 - Accessibility;

⁹ The Hudson / S & A Model of Comparative Destination Evaluation was developed initially at the University of Calgary but has been developed and refined by Stevens & Associates in collaboration with Calgary.

- Enterprise culture.
- 3.03 Weaknesses were identified in terms of the following features of the destination which are, importantly, about organisational and quality issues:
- Definition of the destination;
 - Having a shared philosophy and vision for tourism;
 - Knowledge of the product base (audit);
 - Positioning of the destination;
 - Development strategies / investment;
 - Collaborative working;
 - Resource stewardship;
 - Quality of visitor services / customer care;
 - Hospitality;
 - Visitor experience.
- 3.04 Alongside the Hudson / S & A Model, members of the Partnership, officers of the BBNPA and members of the BBNPA were asked to complete a '*Destination Scorecard*'. Effectively, this is a less complex version of the Hudson Model and allows participants to evaluate (on a scale of 1 – 5) a range of components that make up a destination (attractors, services and infrastructure). The composite average completed scorecard for these three groups of stakeholders is shown on the next page. It reveals that 19 of the 32 components of the destination scored two or less. Particular strengths of the destination are recognised as being:
- The overall environment;
 - The accommodation provision;
 - Access to the countryside;
 - Access to the destination for core markets;
 - Events.
- 3.05 This analysis highlighted particular weaknesses in terms of:
- The quality and range of attractors other than natural features and events;
 - Customer care;
 - The retail / food and drink experience;
 - General aspects of the destination's infrastructure, especially visitor amenities and signage.

STAKEHOLDERS' DESTINATION SCORECARD

NAME OF DESTINATION: BRECON BEACONS NATIONAL PARK

DATE OF COMPLETION: SPRING 2006

Overall Environment

4

Attractors		Services		Infrastructure	
Outdoor Activities	2.5	Eateries	2.5	Access to the Destination	3
Heritage / Cultural Attractions	2	Serviced Accommodation	3	Public Transport within Destination	2
Leisure Attractions	2	Caravan / Camping	4	Access to Countryside	3
Sports Facilities	2	Self Serviced	4	Public Amenities	1
Entertainment	2	Tourist Information Centres	3	Aesthetics of Towns / Villages	2
Interpretation	2	Access to Local Food / Drink	2	Tourist Signposting	2
Art / Craft	2	Customer Care	2	Viewpoints / Lay-bys	2
Well-Being	1	Specialist Retail	2	Cleanliness / Litter	3
Natural Features	4	General Retail	1	Wet weather	2
Wildlife Attractions / Tours	1	Guides / Tour Leaders	1	Road signs	3
Events	4				

- 3.06 These scores reflect the overall assessment of the current situation and reveal a destination with a good foundation upon which to build a future sustainable tourism strategy. It also highlights those areas requiring further investment and product development.

(b) SWOT Analysis of the National Park as a Tourist Destination

Strengths

- High quality natural environment with diverse landscape and scenery in a compact area;
- Rich biodiversity and significant opportunities to experience wildlife;
- Good opportunities for walking, cycling, horseriding and other activities especially for those with limited experience;
- Close proximity to major sources of potential staying tourists in key UK market;
- Brecon Beacons is well known name with high levels of awareness in UK domestic tourism markets;
- Good macro accessibility;
- Good infrastructure of activity providers;
- Strong iconic signature events;
- Increasing willingness to work together in collaboration and partnerships;
- Award winning self-catering caravan / camping and restaurant products;
- Strong network of local towns on periphery of and within Park.

Weaknesses

- Domination by day visitors;
- Over reliance on private motor car;
- Declining market for serviced accommodation;
- Uneven distribution of tourism enterprises across the Park;
- Limited provision of visitor attractions, larger serviced accommodation establishments, quality eateries and cultural facilities;
- Variable quality of serviced accommodation;
- Limited product available for tourists in rural areas;
- Limited provision of easy and direct access to the countryside for casual visitors from within the National Park;

- Large number of local authorities involved in the Park;
- Limited capital available for BBNPA to invest in its core visitor facilities and services;
- Relatively low levels of spend by both day and staying visitors;
- Relatively low exposure of arts, craft, history, culture;
- Uncertainty as to roles and responsibilities amongst public bodies.

Opportunities

- Growth of short break markets especially those interested in:
 - ❖ health and well-being
 - ❖ activities
 - ❖ food and drink
 - ❖ heritage and culture
 - ❖ wildlife tourism;
- Geographic proximity to main markets;
- Development of opportunities to visit using public transport including:
 - ❖ Heart of Wales line
 - ❖ Abergavenny as gateway station
 - ❖ Beacons Bus
 - ❖ linkages between towns;
- Development of Brecon Beacons as a brand;
- Fostering locally-based groups / destinations;
- Maximising the benefits of the main signature events;
- The National Parks branding exercise;
- Increasing use of the Internet for advance bookings, information and interpretation;
- Emphasis upon healthy lifestyles, health agenda and escapism;
- Growing interest in local produce, especially food and drink.

Threats

- Fragmentation of effort and spreading due to the number of agencies and public bodies involved in the area;
- Failure to engage the private sector in an appropriate way;
- Increasing competition from destinations elsewhere in the UK and elsewhere;

- Failure to establish an organisational structure capable of responding to market demand;
- Reduction in public funding in VisitWales and the RTPs and for destination marketing and development;
- Poor quality of many aspects of the visitor experience;
- Inappropriate framework to encourage tourism investment, enterprise and entrepreneurial activity;
- Perceived constraints imposed by the planning system;
- Failure of National Park Plan to adequately reflect the needs and interests of the tourism industry;
- Failure to demonstrate the value and importance of tourism to the economy;
- Tourism perceived as (i) creating negative impacts on the environment and (ii) actually damaging the environment in a small number of locations.

(c) Key Issues and Analysis

- 3.07 The consultation process has identified 23 key issues that are of general concern to key stakeholders in both the private and public sectors. They are as follows. This Strategy will address each of these issues and demonstrate a clear way forward to implement an action plan that will result in their resolution.

The Quality of the Visitor Experience

1. Enhancing the overall quality and consistency of the tourism products (attractors, services and infrastructure).
2. Developing an integrated approach to quality destination management.
3. Encouraging visitors to discover and explore the Park in different ways through staying longer and easily accessing:
 - Activities;
 - Places including the Geo Park;
 - Local people;
 - New experiences;
 - Local food / drink;
 - Local culture.
4. Encouraging the development of a strong sense of place in line with Wales Tourist Board guidance.
5. Maximising the benefits and positioning of the existing three main signature events:
 - Hay on Wye Literature Festival;
 - Abergavenny Food Festival;
 - Brecon Jazz Festival.

Maximising Environmental Business and Community Benefits

1. Engaging the visitor to produce positive benefits for the environment businesses and the community from tourism through:
 - Developing tourism products and initiatives that reward high quality environmental stewardship;
 - Improved understanding and awareness of the environment including local heritage and culture through more effective use of interpretation and information;
 - Generating net additional income from visitors to be reinvested in environmental or community projects;
 - Increasing the value of tourism through extending the visitor season and length of stay.

Marketing, Branding and Developing New Tourist Markets

1. Creating appropriate marketing and promotional opportunities that encourage higher value, year-round tourism based upon quality market research and market trend analysis.
2. Effectively establishing a Brecon Beacons brand within the Welsh brand that reflects the family of National Parks but retains the power and integrity of the Brecon Beacons as a destination.
3. Encouraging more visitors to stay overnight in the Park especially in serviced accommodation.
4. Ensuring that the Park remains appealing and accessible to a wide market.
5. Maximising the potential of the UNESCO Geo Park designation.
6. Developing the role of key towns and villages as hubs, gateways or centres for tourism.

Environmental Enhancement

5. Expanding the number of businesses involved in the Green Dragon cluster.
6. Reducing visitors' dependency upon private vehicles.
7. Managing the pattern and behaviour of day visitor activities in the Park and converting a higher percentage to become staying tourists.
8. Strengthening the biodiversity and ensuring continued adequate levels of investment in the careful stewardship and management of the environment as a key tourism asset.
9. Establishing a framework for agreeing and monitoring sustainable tourism indicators.

Organisational Structure

1. Agreeing a common vision for sustainable tourism development and the geography of the area to which this applies.
2. Developing strong partnerships and collaborative working that effectively involves the public and private sectors.
3. Effectively engaging with and working with communities in this area.
4. Establishing appropriate local and sectoral representation that is supported by and supportive of an overall Park-level Forum or Partnership.
5. Identifying clear roles and responsibilities for all key stakeholders.
6. Determining the role and relationship of the main settlements with tourism in the Park.
7. Establishing a programme of business support and skill development to meet the needs of a modern, vibrant, sustainable tourism destination in the next ten years.
8. Ensuring that the planning system is more supportive of the needs of tourism enterprises in the context of a sustainable tourism approach that is market and environmentally sensitive with policies that reflect a clear understanding of the importance of tourism and the needs of operators.

(d) Results of Survey of Local Businesses

- 3.08 A survey of 900 local tourism businesses in summer 2006 produced a disappointing response of only 8%. The main findings are:
- Most businesses are year-round operators;
 - The majority are members of marketing consortia;
 - The short-break market dominates all accommodation sectors except self-catering cottages;
 - The main trends in the marketplace are:
 - Increase in year round tourism;
 - Increase in demand for outdoor activities;
 - Visitors seeking a diversity of things to do;
 - Ever-increasing expectations about quality and service standards;
 - The key barriers to business growth are:
 - The planning system;
 - Cost and access to finance;

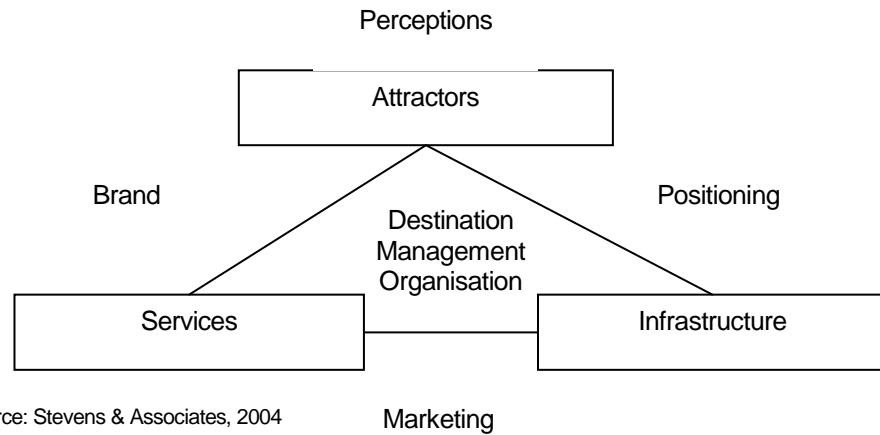
- The main achievements in recent years are:
 - Improved communication within the industry;
 - Increasing standards;
 - Greater range of activities;
- Key strategic issues are:
 - Infrastructure;
 - Better marketing
 - Political commitment to tourism;
 - Improved planning system;
 - Quality matters;
 - Clear roles and responsibilities for key stakeholders especially the public sector bodies.

(e) The Importance of the Visitor Experience

- 3.09 All the relevant strategies, together with the findings of recent international benchmarking and best practice studies, highlight the importance of delivering a quality visitor experience within the destination. The rationale for this is clear and unequivocal:
- National Parks and destinations in general must, as a minimum, deliver the promise and, whenever possible, exceed visitor expectations;
 - The majority of visitors to the National Parks are repeat visits or result from word of mouth recommendation. Consequently, getting it wrong in the destination is the worst form of marketing ... equally **retention** of existing business is easier to achieve than the **acquisition** of new business.
- 3.10 As a result there is an increasing recognition of the importance of destination management as the key to provide visitors with a quality visitor experience. This involves the application of the **integrated quality management (IQM) approach** to the destination. IQM has been advocated by the Wales Tourist Board as part of its **Tourism Growth Area** initiatives since 2000. IQM could also be said to be at the heart of the European Charter for Sustainable Tourism in Protected Areas.
- 3.11 IQM requires a partnership approach, including the involvement of communities and key stakeholders, at all stages in the process of planning, developing, marketing and managing destinations. It is founded upon the destination model (see Figure 3.1) which reviews the destination from the perspective of:
- Attractors
 - Services
 - Infrastructure

- Marketing, branding and positioning.

Figure 3.1: Destination Model



Source: Stevens & Associates, 2004

(f) Learning from International Best Practice

- 3.12 A considerable body of knowledge now exists about sustainable tourism development and the successful management of visitors in protected areas. This has resulted in a wide range of documents advocating good practice and offering guides on sustainable tourism development (see Table 3.1).

Table 3.1: Sustainable Tourism Development – sample of guidelines and principles

Date	Title	Publisher
1989	Principles for Tourism in the Countryside	English Tourist Board and Countryside Commission
1989	Heads of Agreement on tourism in the National Parks	Wales Tourist Board and Countryside Commission
1991	Principles for Sustainable Tourism in Britain	Maintaining the Balance. Tourism and Environment Task Force
1991	Beyond the Green Horizon	Tourism Concern with World Wide Fund for Nature
1992	The Development of National Parks and Protected Areas for Tourism: Guidelines	WTO / UNEP / IUCN
1992	Ecotourism Diagnostic and Planning Guidelines for Protected Area Managers	WWF International
1993	Ecotourism Guidelines for Nature Tour Operators	The Ecotourism Society
1997	European Charter for	FNNPE

	Sustainable Development in National Parks	
1997	Agenda 21 for the Travel and Tourism Industry	WTTC
1997	Statement of Principles for the Balanced Development of Sustainable and Cultural Tourism	ICOMOS
1998	Tourism – Towards Sustainability	Local Government Association of England and Wales
1999	Working Programme for Sustainable Tourism	Commission on Sustainable Development
1999	Global Code of Ethics for Tourism	WTO
2000	Tour Operators Initiative for Sustainable Tourism Development	UNEP / UNESCO / WTO
2000	Principles for the Implementation of Sustainable Tourism	UNEP
2001	Guidelines for Community Based Ecotourism Development	WWF International
Undated	Sustainable Tourism: Development in Balance with the Environment	Tourism Society London
Undated	Codes of Ethics for Tourism	Tourism Industry Assoc of Canada
Undated	Sustainable Tourism: Bridging the Gap	UNEP
Undated	Code for Environmentally Responsible Tourism	PATA
Undated	Environmental Guidelines	WTTC

3.13 There are some 20,000 protected areas in Europe; mostly within IUCN categories of protected areas II, IV and V (see Table 2). These protected areas fall into two main approaches for the management of tourism and public use for amenity or recreational purposes:

- (i) strict nature reserves and wilderness sites where the emphasis is upon controlling access and limiting specific activities to particular zones, locations or facilities;
- (ii) inhabited landscapes where, although the main issue is still conservation, sustainable development is allowed in parallel because of concern for socio economic and cultural issues.

3.14 Clearly the Welsh National Parks fall within category (V) where the requirement is to seek to integrate different development objectives in order to meet sustainable

objectives¹⁰. Over the past 30 years those responsible for managing both types of protected areas have focused their attention on improving their techniques for managing tourism and visitor pressure¹¹. In 1993 the publication of the report '*Loving them to Death*' by the Federation of Nature and National Parks of Europe¹² was a major milestone in creating a momentum for a more positive partnership based approach to tourism planning and management in National Parks.

3.15 For the first time those responsible for managing National Parks were provided with a set of recommendations to guide sustainable tourism development. The report recommended:

- a strategic approach
- community involvement
- assessments of carrying capacity and limits of acceptable change
- survey and analysis of visitors
- targeted marketing
- cooperation with the private sector
- monitoring and managing impacts

3.16 In 2002 a study for Scottish Natural Heritage entitled '*Sustainable Tourism in National Parks and Protected Areas*' examined eight case studies:

1. New Forest, England
2. Peak District BBNPA, England
3. Exmoor BBNPA, England
4. Lake District, BBNPA, England
5. Hohe Tauern NP, Austria
6. La Garrotxa, Spain
7. Cévennes, France
8. Värmland, Sweden

3.17 The success factors which represented '*best practice*' common to each of these case studies are shown in Table 3.2.

¹⁰ This has been discussed in a Scottish context by Crofts R. in '*Sustainable Development and the Environment: Delivering Benefits Globally, Nationally and Locally*' 2000 by Scottish Natural Heritage.

¹¹ This has included: improved planning such as zoning and development control policies; managing visitor flows and behaviour through marketing and interpretation; better understanding of impacts and the use of GIS techniques; and creating alternative leisure provision such as country parks.

¹² Published originally in 1993 and updated in 2001.

Table 3.2: Sustainable Rural Tourism – a checklist for local authorities and other interests

Elements	Aims	Activities
1. Resource management	Protect, maintain and enhance local environmental quality	<ul style="list-style-type: none"> • Prepare visitor management plan and vision statement • Take action to protect sensitive sites • Record visitor numbers and behaviour • Monitor sensitive sites • Assess environmental impact of proposed developments and visitor use • Understand relationships between visitors and the resource
2. Marketing	Influence scale, nature and type of tourism in response to environmental and local factors	<ul style="list-style-type: none"> • Promote sustainable messages to visitors • Avoid promotion of sensitive and fragile sites • Involve local tourism operators • Involve environmental agencies • Extend the season to spread impact and benefit where appropriate • Monitor impact of marketing • Develop partnerships and packages to promote appropriate tourism products (scale, volume, character, location)
3. Transport	Reduce the use and impact of cars and encourage alternative forms of transport	<ul style="list-style-type: none"> • Promote and encourage the use of public transport • Improve services to meet needs of visitors as well as residents • Introduce traffic management schemes • Develop comprehensive area strategy for traffic management • Monitor traffic volumes and movements • Understand consumer travel patterns • Encourage alternative forms of travel within the area
4. Community	Involve local people in shaping tourism policy and decisions	<ul style="list-style-type: none"> • Encourage and support community tourism forums/groups • Support community based initiatives • Involve community in drawing up visitor management plans • Engage community councils • Involve local elected members

5. Local benefit	Increase local economic contribution from tourism	<ul style="list-style-type: none"> • Promote local purchasing initiatives • Set up networks of local producers • Assist local businesses to get more from tourism • Involve local crafts people, artists and designers in all aspects of marketing
6. Visitor welcome	Influence visitor behaviour to reduce negative impact and increase environmental awareness and benefits	<ul style="list-style-type: none"> • Raise awareness of conservation issues • Emphasise special character of area through imaginative interpretation • Increase contact between visitors and local people • Improve the welcome to visitors • Develop local showcase facilities for cultural experiences • Consider visitor pay back schemes
7. Tourism industry	Reduce the environmental impact of the local tourism industry and maximise the benefit to local operators	<ul style="list-style-type: none"> • Promote use of the <i>Green Tourism Business Kit</i> or similar • Encourage adoption of environmental good practice • Introduce environmental award schemes • Provide environmental advice, training and business development • Raise enterprises' awareness of their local environment • Stimulate local supply chains • Develop local packages to promote environmental or sustainable travel/ activities/holidays

3.18 The seven key features of the success in these case studies are:

- (i) Local solutions are required to suit local needs;
- (ii) Tourism development is part of a wider rural integrated development programme;
- (iii) Community and local business involvement is essential;
- (iv) Building local capacity and assisting local business development is important;
- (v) Actively promoting national parks by focusing on environmental factors and sustainable tourism products makes market sense;

- (vi) Developing a sustainable tourism strategy takes time and cannot be undertaken in isolation;
- (vii) Collaboration and partnership working is essential.

3.19 In 2006 Scottish Natural Heritage also commissioned follow-up research to Review Best Practice in *Sustainable Tourism in Protected Areas in Coastal Environments*. Although this Study may not appear to be directly relevant to the Brecon Beacons, the findings mirror those of the 2002 study, as well as those of the 2005 META project, 'Planning for Marine Ecotourism in the EU Atlantic Area' and the Highlands and Islands Enterprise sponsored research into world class mountain destinations of 2005. The key lessons from all of these studies highlight the importance of:

(i) The Policy Context and Funding

This identifies the importance of a strong policy framework, an integrated approach, the need for strong leadership, stable funding and a sustainable approach to tourism based upon harnessing the area's indigenous natural and cultural resources.

(ii) Marketing, Information and Communications

This recognises the importance of having a professional approach to the entire range of communication activities developing a systematic approach to marketing based upon the identification of core brand values.

(iii) The Role of Communities and Local Benefits

This identifies the need for community engagement and buy-in, supplemented by community initiatives that enhance the quality of life for local people, as well as stimulating local economic activities.

(iv) Partnerships and Alliances

This highlights the significance of establishing strong cross-sectoral partnerships involving the key stakeholders, especially those that engage both communities and the business sectors.

(v) Visitor Management, Welcome and Transport

This embraces a wide range of actions, activities and initiatives aimed at enhancing the visitor experience whilst, at the same time, ensuring the protection of the environment. There is a particularly strong emphasis upon voluntary codes of practice with recreational user groups, the use of interpretation and undertaking market research.

3.20 The dominant three key lessons with the most references in the case studies highlight the importance of having:

- Adequate, innovative and market-led visitor management, welcome and transport-related programmes.
- An appropriate framework of policies and plans that ensures and delivers stable context and funding to support sustainable tourism development.

- Involved local communities and ensuring that community benefits can be maximised.
- 3.21 The emphasis upon the visitor management and the visitor experience within the designated area is significant from three perspectives:
- (a) It recognises that resource management is supported by the well-planned management of visitors;
 - (b) Investing in the provision of quality visitor services, facilities and activities (including interpretation), enhances the visitor experience, increases visitor satisfaction and engenders awareness and support for the conservation effort;
 - (c) Visitor management and developing the visitor experience creates opportunities for community and private sector enterprise; thus, helping to sustain local communities.
- 3.22 Visitor management is often based upon voluntary '*codes of conduct*' that involves recreationalists and user groups in determining the levels, times and types of recreational use in particular areas or times of the year. The use of these codes of conduct is generally supplemented by zoning plans and use permits.
- 3.23 There appears to be a 'spirit' of innovation in the development of new visitor products and services. These are often in the form of a new 'twist' to a tried and tested formula. For example, novel themes or routes to the traditional guided walk or tour. Indeed, it is worth stressing the fact that many of the highlights of 'good practice' are in fact traditional, often simple projects done with flair, invention and implemented as part of an integrated plan.
- 3.24 There is a relatively strong commitment to market research and understanding the needs of visitors. As a result, there tends to be a market led and informed approach to developing the visitor experience. This is strengthened by the involvement of the private sector either through advisory committees or specialist fora.
- 3.25 Community engagement is a critical success factor; from involvement in strategic planning through to the adoption of branding and marketing collateral. There is widespread commitment from the public agencies to provide support for community development and the nurturing of local enterprise. Critically, many of the case studies emphasise the importance of 'gateway' communities and the location of key visitor facilities (such as information centres) within these gateway communities.
- 3.26 Most of the case studies exhibit a sound understanding of the need for good communications amongst stakeholders and a professional approach to marketing and PR. There is a recurring theme evident in the literature used to research the case studies of the importance of branding as a means of conveying the core messages, themes and values of the protected area. This is especially well-developed in the Great Barrier Reef, Wadden Sea, Secovlje Salina, Chesapeake and Väinameri case studies. It is no coincidence that these case studies have interesting, user friendly, attractive and innovative web sites.
- 3.27 Although spread across 14 different countries, having a range of protected designations and a variety of management organisations, they exhibit a high level of commonality in (a) their approach to sustainable tourism development and (b)

in the type of projects and initiatives which are used to promote and develop sustainable tourism.

- 3.28 Significantly, this is based upon a strategic process that resembles that found in other international tourism benchmarking studies. The common features of the approach are:



- 3.29 In all the case studies there is a strong, political commitment to the long-term stewardship of the protected area. As a result, there is a stable organisational and financial base within which the disciplines of strategic management and planning take place. They all exhibit a propensity to engage stakeholders, especially community groups, tourism businesses and recreational user groups in sustainable tourism planning, management and development.

- 3.30 Critical success factors appear to be (i) an understanding of markets and their demands and impacts on the resource; (ii) a coordinated approach to the delivery of a quality visitor experience within the Park and (iii) a professional and consistent approach to marketing, information and interpretation. In addition, there is evidence of innovation especially in terms of:

- Market-led tourism product development;
- Finding new ways of managing resources and products;
- Raising money to assist the conservation effort.

- 3.31 In each of these case studies there is a clear recognition of the importance of an integrated approach to destination management designed to ensure a consistent quality visitor experience. The United Nations World Tourism Organization endorses the concept of destination management and destination management organisations as a key feature of sustainable tourism development.

- 3.32 Recent international benchmarking studies have confirmed the importance of destination management organisations (DMOs) as one of the critical success factors in gaining a competitive edge in the marketplace. DMOs exist to lead and coordinate tourism activity within a destination. They are increasingly private sector led organisations with a strong partnership with the public sector. Their role is to:

- Undertake market and business research;

- Ensure quality information for visitors within the destination;
 - Establish good communications amongst all the key stakeholders;
 - Undertake marketing and promotion of the destination.
- 3.33 The geographic extent of destinations is defined by a number of factors: cultural and historical interrelationships; topography and market perceptions. The international benchmarking studies highlight the fact that the successful destinations are relatively small in terms of their physical size (800 – 900 square miles) and have the following characteristics:
- They are **coherent** and understandable for visitors and residents;
 - They are **cohesive** and make sense in terms of relationships between places, activities and tourism products;
 - They have a **critical mass** of places to stay and things to do;
 - They are **competently** managed and marketed.

(g) Existing Strategy - Review

- 3.34 The past five years have witnessed the structured implementation of the BBNPA's existing tourism strategy in seven key areas of work, notably:
- (ii) **Visitor Management** – where the Beacons Bus, the Offa's Dyke Flyer and the Discover and Travel Guides have been well received with the '*Information, Interpretation and Education Strategy*' (2003) being progressed by Visitor Services and Education. This is a well researched and robust Strategy that is being systematically implemented.
 - (iii) **Activity Tourism** has been regarded as the major priority area for product development with good progress being made in the implementation of the cycling and walking strategies. The Tourism Growth Area Initiative has been especially significant in support of product development and targeted business support.
 - (iv) **Economy – Environment Links** has seen the development and expansion of the Green Dragon environmental accreditation programme. The local food initiative and action programme¹³ is raising awareness of the importance of local food and drink for tourism. Specific initiatives, such as the Welsh Breakfasts with Crick 21, the Local Food Recipe book and the growing success of the Abergavenny Food Festival are significantly achieving this goal.
 - (v) **Trade Liaison** and the engagement of local enterprises, both large and small, has been seen as an essential delivery mechanism for the Strategy. Key elements of this relationship building include:
 - Tourism in Action Conference, an annual gathering of tourism businesses and the public sector to discuss key issues;

¹³ Based upon '*Local Food Distribution in Brecon*' by Glasu Leader + 2004.

- Action for Tourism newsletter;
 - Trade Training in association with Medrwn/TPMW.
- (vi) **Community Engagement** has developed over the past 4 years. IQM projects have been developed in Talgarth, Brecon and Crickhowell with more planned in a series of communities over time.
- (vii) **Marketing** is recognised as being a challenging area of activity with issues surrounding partnership working, branding, internet optimisation and other collateral needing attention.
- (viii) **Monitoring and Review** has been focused upon generating local data through the STEAM project and the successful implementation of the 2005 visitor survey. The need for sustainable tourism indicators has been highlighted.
- 3.35 This review highlights significant progress on a number of fronts with the need for ongoing implementation of a number of the already adopted strategies and action plans. Key areas of further opportunity to be prioritised in this strategy relate to:
- Trade liaison;
 - Community engagement;
 - Marketing and branding;
 - Monitoring.

(h) Future Tourism Markets and Trends

- 3.36 Recently there have been a number of studies analysing future trends affecting the demand for tourism in Wales¹⁴. These studies highlight the implications of socio-economic change in Wales' core markets, including:
- (a) **Demographic change**, resulting in an increasingly ageing population with people living longer, being more healthy and active throughout their lives;
 - (b) **Families in flux**, with a growing number of single parent households couples without children and single occupancy households;
 - (c) **More mobility combined with greater affluence and increased spending of disposable income on leisure** will continue to fuel demand for holidays, especially short-break trips, interest in new activities and visiting different places by increasingly discerning, experienced travellers seeking quality and value for money;

¹⁴ See, for example:

Nelson, W. 2004

Emerging Values and Traits of Holidaymakers. The Futures Foundation.

Prospects for the UK Tourism Markets. January

The Henley Centre 2004

Future Scenarios for Tourism in Wales. WTB

A* Research 2005

The Countryside Experience. WTB

- (d) **Individualism and the search for self-development/self-fulfilment** is resulting in growing demand for customised packages, the search for the authentic and the shift away from stereotypes.
 - (e) **Busier lives and the experience economy** is leading to the desire for more experiences and memorable moments alongside the need for tourism destinations to satisfy many different needs in one visit;
 - (f) **Holiday taking is now seen as a basic essential** by the majority of households; the differentiation is no longer about '*whether you participate, but how you participate*';
 - (g) **The search for well-being**: this combines the consumers' growing desire to live longer and be physically healthy whilst looking good and feeling good. The health benefits, both psychological and physiological, of exercise in the countryside is becoming an increasingly important driver of demand.
- 3.37 These drivers create significant opportunities that appeal to emerging markets in a way that is compatible with the area's heritage and cultural and environmental capacity. The destination has the potential to capture the high yielding, discerning leisure tourists whose lifestyle aspirations are matched by the positioning, product and experiences available in the destination.
- 3.38 The domestic UK market is, and will remain, the dominant source of visitors for Wales and the Brecon Beacons together with growth in selected North European markets and in targeted niche markets. In this context, recent events such as British-based terrorism, fluctuations in the rate of inflation and increasing airfuel prices are likely to influence market demand.

(i) Market Interest

- 3.39 Market research has consistently shown the importance of landscape and scenery as the primary motivation for the majority of holiday visitors to Wales. The National Parks represent the best quality landscapes and contribute significantly to the overall appeal of Wales as a rural tourism destination of first choice. In 2003 it was estimated that the three Welsh National Parks hosted over 20 million visitor days whose spending totalled over £720 million.
- 3.40 Recent research for 'The Countryside Experience' report highlights the importance for Wales of those markets referred to as '*light actives*' and '*browsers*'. Analysis of the UKTS data reveals that the UK domestic market is dominated by these segments.
- 3.41 '*Light actives*' represent 22% of the market and like to do outdoor activities but heavily intersperse these with non-energetic pastimes. '*Browsers*' represent 45% of the market and do relatively little activity but want to dabble, try a range of things to do and spend time exploring and discovering the area.
- 3.42 These markets are primary targets for the Brecon Beacons as all local research has shown. They are markets for whom access to quality local food and drink, craft and interesting retail, as well as access to heritage and cultural experiences are fundamentally important to their initial decision making and their overall experience.

- 3.43 'Heavy' and 'dedicated' actives – those tourists who spend most of their time away doing a specific activity – represent 17% of the UK market for countryside holidays. These niche markets tend to have their own networks for information and knowledge of the area. As a result, these should not be priority markets. This does not mean that marketing activity should not take place but this should be via the overall structure of activity led by WAG, TPMW, Mid Wales Tourism and others.

(j) Business Tourism

- 3.44 VisitWales has recently highlighted the increase in demand for a number of different segments within the generic business tourism market to use locations and venues that offer 'something different' or can provide added value. There is a growing alignment between businesses adopting corporate social responsibility best practice and the search for appropriate venues for their meetings, conferences, incentive and team building activities.
- 3.45 Brecon Beacons National Park is well positioned to capture the smaller scale elements of this market offering a diverse range of venues and accommodation with direct access to a quality environment and a wide range of activities. These markets have the potential to create year-round business, can assist existing operations diversify and will increase the overall value of tourism in the Park. Importantly, it is generally recognised that up to 40% of corporate or business visitors to an area will return as leisure visitors at some future stage.
- 3.46 At present little is known about the scale of the existing use of the Park by business tourism. There are, however, a number of businesses which have successfully entered this market whilst the main festivals and events are also now beginning to recognise their corporate potential. This is an area of tourism growth which should be encouraged especially where there is a clear synergy between the clients' reasons for selecting the National Park and the Park's values.
- 3.47 Business tourism is a clearly defined sector of the wider tourism economy and encompasses:
- Delegates to and organisers of conferences
 - Exhibitors at and visitors to trade fairs and exhibitions
 - Incentive travel award winners
 - Corporate hospitality
 - Individual business travellers
- 3.48 "Business tourism is the most lucrative, highest growing, highest quality and highest yielding component of overall tourism"¹⁵ and is worth £15 billion¹⁶ annually, nearly a quarter of all inbound tourism to Britain. Inbound business tourism amounts to £4 billion¹⁷ and domestic, £11 billion. Recent research by the Business Tourism Partnership in January 2003, entitled 'Business Tourism

¹⁵ Business Tourism Partnership, *Leading the Way*

¹⁶ Business Tourism Partnership Research Committee

¹⁷ International Passenger Survey, 2000

Briefing: An Overview of the UK's Business Tourism Industry' has highlighted the following key points:

- Over the last ten years there has been a 53% growth in all business trips, exceeding the overall tourism growth rate.
- The sector generates 29.7% of all overseas visitors to the UK and 31.7% of all inbound tourism earnings
- Particularly strong growth above rates in all other sectors is predicted for the conference and incentive markets over the next five to seven years
- The conference and incentive travel segments are predicted to grow at a faster rate than any other tourism sector to the year 2010.
- By 2010 income from international business tourism in the UK is expected to represent 45% of all tourism income.

3.49 Business tourism creates quality employment opportunities and is resilient to factors which create peaks and troughs in the leisure tourism markets (e.g. weather conditions, foot and mouth disease). Some 1.4 million conferences of more than eight delegates took place in 2001 – mainly in urban or airport hotels (71%) but with a significant proportion in rural hotels (10%). The average daily spend of a business tourist is £133.50. It is estimated that 40% of business visitors return with their families on a leisure trip¹⁸.

3.50 Business tourism is characterised by being high yield, year round and generally resilient. In addition, there is growing recognition that business tourism neatly complements the leisure tourism sector. It is now accepted that business tourism requires a higher density of labour to service its demands than leisure tourism. Every effort needs to be made to leverage and convert business tourism markets into future leisure tourists.

3.51 Potential exists to build further links between countryside activities, healthy lifestyles, and the corporate sector within Wales and beyond. In particular, participatory events are becoming the fastest growing segment of the corporate hospitality market, registering 40% growth between 1997 and 2001¹⁹ and to some extent replacing the market for high-profile sporting and countryside events.

3.52 The destination could benefit from encouraging business tourists to stay beyond their original stay, maximising yield. This could be achieved by a combination of:

- Leisure offers to extend stay and make repeat visits;
- Encouraging guests and partners to accompany;
- Social programmes with activities with VIP passports;
- Creating opportunities for incremental spend through shopping, entertainment and visits to attractions.

3.53 These initiatives will require careful coordination and is best undertaken by fostering greater collaboration between business tourism providers and particularly activity/cultural providers.

¹⁸ Conference Delegate Expenditure Survey, 1998

¹⁹ Mintel, June 2002, cited in Conference & Incentive Travel, January 2003

- 3.54 Market trends indicate that there are opportunities for growth in the provision of smaller and more unusual meetings venues. Visitor attractions, sports facilities, museums, theatres and country houses have responded to this demand by promoting their facilities to business events organisers. Already some venues in the Park market their facilities this way.
- 3.55 The business market is, therefore, potentially of considerable importance and is likely to grow as long as the product offer keeps in pace with the quality needs of key markets. Activities likely to yield the highest growth include training events, management meetings, product launches, sales conferences and team building activities. One of the major issues is the need to increase awareness of the range and quality of offer available to business markets within the National Park as a whole and particularly to near markets.

(k) The Importance of Local Products

- 3.56 Promoting the use of local products in tourism is important for four reasons:
- They give the visitor a genuine experience of what the local culture is based upon – improving the connection to the sense of place;
 - They help retain money inflows within the local economy, improving economic sustainability;
 - They increase the amount of local employment, often in high added-value jobs, improving community cohesion and counteracting the tendency to emigration;
 - They help retain the link to the landscape – whether this be by the use of locally obtained food ingredients grown using environmentally friendly techniques or by visual arts inspired by that landscape.
- 3.57 In a recent study of international best practice in using local produce to promote and develop tourism destinations by Highlands and Islands Enterprise Moray, the conclusion reached was **that the quality of the visitor experience was the outcome of a clear, unambiguous, strategic approach** evidenced in a series of six case studies by:
- (i) a strong commitment by national, regional and local governments to developing local produce and tourism;
 - (ii) the existence of strategies and action plans endorsed at every level with full private and public sector buy in;
 - (iii) the establishment of strategic alliances and partnerships to deliver strategy and that these are often cross-sectoral and private sector led;
 - (iv) the existence of a strong local destination management organisation to implement actions.
- 3.58 **Local Food** There are strong market led reasons for investing in the local food economy and for tourism businesses to make strong links with local food producers. Local food is a symbol of good quality and a respectful attitude to food on behalf of the business. Customers are always looking for a new food experience and will be drawn to businesses that offer them that. It is a part of

experiencing a new area that defines its character differentiates it from the rest of the marketplace. From a sustainability perspective the use of local food reduces food miles, increases local employment and, particularly where organic methods are used, enhances conservation values. Encouraging the development of a local food culture amongst tourism providers is a major and long term exercise but is a critical part of tourism development. A start has been made both locally by the NPA in partnership with Adventa, Medrwn/TPMW and Glasu and at a regional level by TPMW.

- 3.59 The STEAM figures highlight the importance of food, drink and shopping to the visitor economy. In 2004, of the total direct expenditure by visitors, some 32% was spent on food/drink (£25.8 million), with a further 24.5% (£19.6 million) on shopping. Together, these two aspects of the visitor experience account for over 56% of all direct spending and seven times that derived from visitor spending on overnight accommodation.
- 3.60 Research for WTB's '*Countryside Experience*' (2005) identified that amongst those core markets with a high propensity to take countryside holidays in the UK the following is the rank order of factors influencing their choice of a destination:
1. Customer service / welcome
 2. Quality food and drink
 3. Choice of quality accommodation
 4. Availability of attractive scenery
 5. Things to do and see.
- 3.61 The research also highlighted the key perceived weaknesses of Wales versus its main UK competitors. These are all critical factors in choosing a destination:
- Being welcoming;
 - Lack of quality food reputation;
 - Poor choice of accommodation;
 - Lack of visitor friendly and visitor relevant shops.
- 3.62 The current dining out experience in the Park is patchy and inconsistent with the food offer being generally regarded as only 'average'. There are clearly businesses which are the exception and there are also an increasing number of quality local food and drink producers. The use and promotion of local and particularly organic produce is good from an environmental and economic point of view, as well as positively enhancing the visitor experience.
- 3.63 Encouraging and promoting tourism enterprises to use local produce makes sense. BBNPA has been active in a number of initiatives in recent years including developing Welsh Breakfasts, working with activity centre providers, supporting farmers' markets, matching tourism businesses to food producers and supporting local food festivals.

- 3.64 The Tourism Partnership Mid Wales has recently undertaken a scoping study about local food/drink provision in the Region. This has identified a multiplicity of organisations involved and the absence of a strategic coordinated approach. As a result, TPMW is commissioning a strategy to be completed in autumn 2006. This should provide the framework and leadership for the development of food tourism in the National Park.
- 3.65 In due course it would be valuable to develop a Food Tourism Strategy (given time and resources) but in the meantime the following actions seem important:
- Make food development a priority for tourism development work at a regional and local level;
 - At a regional and national level, work in partnership with the Agri-Food Partnership;
 - At a local level, build on the partnership developed between BBNPA, Adventa, Glasu and Medrwn/TPMW;
 - Encourage the RDP and Competitive/Convergence programmes in Powys, Monmouthshire and Carmarthenshire to support the development of food-tourism links;
 - Promote the uptake of local and organic food by tourism businesses NPA;
 - Further promote the Black Mountains Breakfasts project;
 - Develop a Food for Tourism newsletter for tourism businesses and food producers;
 - Maintain a programme of training/familiarisation/meet the producers events;
 - Assist in the development of a local food producers cluster group to enable that industry to develop;
 - Use tourism information (especially Visitors Guide and website) to promote retail sales of local food to visitors, giving details of retail outlets.
- 3.66 **Local Retail** A similar approach is required to maximise the potential for specialist retailing. This should build upon existing strengths which include:
- Books** ... Hay-on-Wye commands this market and Blaenafon is attempting to follow its lead;
- Antiques** ... this is potentially a contentious area of retailing with concerns that it is denuding an area of its material assets. There is, however, a growing market for antique shopping and Llandeilo, Brecon and Abergavenny have scope to develop their foothold in this marketplace;
- Outdoor Clothing and Equipment** ... the core strengths and appeal of a destination in terms of its recreational activities should be reflected in the range of outlets selling goods that support, complement and assist visitors to enjoy those activities. There is scope to encourage more specialist providers and to coordinate information to visitors about the availability of these outlets. Wider economic benefits will be achieved if producers / manufacturers of this outdoor gear are encouraged to locate in the Park;

- 3.67 **Arts & Crafts** Arts & Crafts tend to draw their inspiration from the landscape increasing the sense of place and act as interpreters of that environment in a felt sense. There is, therefore, a strong argument for encouraging local crafts businesses. There is also strong demand for taught courses for those wanting to learn new skills or develop existing ones.
- 3.68 There have been two major initiatives in the past focusing on this area – Merlin's Meander and Brecon Design Centre. Both of these have experienced problems and have had only had a limited impact. However both have demonstrated that there is a community of arts and crafts businesses who have at least some desire to work together. Brecon Action worked to coordinate and promote the town as an arts and crafts destination and businesses are starting to set up here.
- 3.69 Arts and crafts should be seen as a priority for the area. There is a need for a partnership approach to the sector's development, however there is currently no lead body to take this forward across the destination. This should be discussed at a Tourism Partnership level and a lead body identified if possible.
- 3.70 In the meantime, some work can be implemented with relatively little resource:
- Maintain and develop the current database of arts and crafts businesses in order to enable communications;
 - Use tourism information (especially Visitors Guide and website) to promote local arts and crafts to visitors, giving details of retail outlets and, where practical, courses;
 - Cluster development work by Brecon Action within the town;
 - Use of arts and crafts in marketing literature;
 - Encourage use of local arts and crafts materials by tourism businesses through sense of place development work.
- 3.71 **Local shops** in villages both adds charm to their product but also those shops have much to gain from exploiting visitor spend. The trend is towards consolidation of enterprises such as post offices, garages and pubs so that there is one retail outlet in a community. This can be positive if it enables that facility to survive and serve the local people throughout the year.
- 3.72 **Specialist Retail** There are a number of other specialist retail opportunities based on the visitor economy. Indeed the Countryside Experience data shows that much of the activities spend is from the partners of 'Heavy Actives' who occupy themselves shopping whilst their partner is in the great outdoors. Examples include antiques, jewellery, designer clothes, books, etc. It may be that individual communities will develop a reputation for a specific type of product and this should be encouraged. Once determined, the product can be used as part of event development as well as marketing. Hay on Wye can serve as a particularly strong example of what can be achieved with product development linked to excellent marketing:
- Through community engagement work encourage the development of appropriate local retail strengths;
 - Develop database of specialist retail;
 - Use website to promote specialist retail.

- 3.73 **Business services** - Tourism businesses utilise a wide range of products and services. Many will have to be sourced from afar because of their specialist nature and the need to ensure choice of quality suppliers. However, many products and services are available locally and may provide a better solution in the long term. The advantages of local purchasing can be:
- Close working relationships that develop over a period of years;
 - Better understanding of the business's working environment, aspirations and customer base;
 - Swift deliveries;
 - More commitment from local suppliers;
 - Business seen as part of the local community, contributing towards its socio-economic life;
 - Lower transport costs;
 - Higher sustainability – money being retained in the local economy.
- 3.74 Through the Green Dragon process, local purchasing is already encouraged but there is no resource database to support business decision-making. Equally there is little support to encourage any other business to pursue a local purchasing policy. Whilst generally this is not a specific tourism arena, work should be developed with those involved in more general economic development with the aim of encouraging and supporting local purchasing of business products and services. More specifically, it would be valuable to develop and maintain databases of local businesses of particular importance to tourism businesses – e.g. web designers, print designers, printers, accountants, solicitors, car hire, taxis, etc.

(I) The National Park, the Health Agenda and Demand for Well-Being

- 3.75 There is considerable potential for the Brecon Beacons National Park to make a significant contribution to raising awareness about the health benefits of exercise in the countryside and providing opportunities for residents and visitors to gain direct benefits. The BBNPA is already experimenting with developing measures of cardio impacts of walking or cycling particular routes which is a useful pilot for a more strategic approach.
- 3.76 The World Health Organisation (1958) describes health as:
- 'A state of complete physical, mental and social well being, and not merely the absence of disease and infirmity'*
- 3.77 Health falls into two categories – physical and psychological. It is widely recognised that there is a close and direct relationship between the two. Psychological health is considered a benefit of physical fitness (*'fit in body, fit in mind'*) whilst psychological health greatly enhances overall well-being²⁰.
- 3.78 There is considerable synergy between health and recreational activities. Recreation as a concept embodies mental and physical recuperation and regeneration. Increasingly, health is becoming integral to lifestyle, resulting in a

²⁰ See 'Our Healthier Nation: Saving Lives' White Paper 1999.

more purposeful use of leisure time to pursue recreational activities that improve and enhance quality of life.

Figure 3.2: Motivation for health related activity

Psychological	Physical
Confidence	Fitness
Energy	Exercise
Happiness	Rest/relaxation
Optimism	Diet/nutrition
Self-contentment	Sleep
Well-being	Wellness
Stress management	
Recuperation	
Long life Quality of life Changing lifestyle	

- 3.79 Leisure has become a greater priority for many people over the past ten years. However, time available for leisure has become more squeezed as those in employment are working longer²¹. Research by the Henley Centre in 1996²² illustrates how hours of free time vary according to lifestyle and stage of lifecycle. In the UK the population is getting older with a particular increase in 40+ and 60+ age groups. This group is becoming more active and has a high propensity to become involved in recreational activities for health.
- 3.80 Improvements to people’s health can be achieved by them becoming more physically active on a regular basis. A review of recent research and promotional campaigns has confirmed that physical inactivity carries a far higher risk of contributing to coronary heart disease and some forms of cancer than do smoking, drinking or poor diet and that substantial improvements in public health, particularly in relation to coronary heart disease, are possible through encouraging more people to become more active on a regular basis. Targets set by the Government encourage people to aim for 30 minutes of moderate exercise every day.
- 3.81 As walking and cycling are relatively inexpensive activities, require no special skills and can be built into people’s regular, daily routine, they provide one of the best ways for people to become more physically active. Having safe, attractive opportunities to walk or cycle from the doorstep and into the countryside, though, is very important if this is to be achieved.
- 3.82 A number of social benefits can arise from people taking part in open-air recreation, including:
- escaping from the pressures of modern living – gaining relaxation, refreshment and challenge, and thus helping reduce anxiety and stress levels;

²¹ The UK now works the longest average full-time weekly hours in Europe at 43.6 hours per week. Between 1993 and 1999 the hours worked per week by men increased by 8% and for women 10%. Over 30% of men work more than 48 hours per week and 5% over 60 hours. For women the comparable figures are 12% and 2%.

²² ‘Leisure Tracking Survey 1996’

- better opportunities for social interaction – meeting people or going out in small groups, and thus helping to enhance communities;
 - a more socially inclusive society – walking and cycling are inexpensive activities and better access opportunities close to towns and cities means that people without a car can visit and enjoy the countryside more.
- 3.83 Walking is a low cost activity accessible to people of all ages and requires no special skills or equipment. Providing local path networks close to where people live also gives a wider range of people, particularly those without access to a car or to affordable public transport, the opportunity to enjoy the outdoors and share in some of the benefits that can result. Such local provision can also be part of wider environmental improvements that help to restore community spirit through increased social interaction and a better living environment.
- 3.84 Research²³ confirms that core health and fitness markets tend to be older suggesting that health awareness may increase with age. Health has become a major issue for consumers both in terms of (a) it being a fundamental part of new leisure experiences (embracing pleasure and knowledge for self-improvement); and (b) our priorities in life.

Figure 3.3: Time squeeze: hours of free time

Life Stage	Hours Free Time
Retired	88.9
Not working	66.3
Full time post family	52.5
Full time pre family	47.2
Full time male with family	46.6
Full time female with family	13.5

- 3.87 Further research by the Henley Centre for Forecasting²⁴ has shown that health and fitness features third in UK consumers' priorities after the family and the house. It is preceded by 'Skills/knowledge' and 'appearance', both of which are significantly enhanced through health/fitness.

Figure 3.4: Consumer priorities 1999

Priority	Issue	% of Population
1	Family	95%
2	Home	91%
3	Health	90%
4	Skills/knowledge	83%
5	Appearance	81%
6 =	Hobbies	74%
6 =	Clothes	74%
8	Household goods	70%

²³ 'Planning for Consumer Change' 1999

²⁴ Health and Fitness, 1999

- 3.88 Attitudes towards health and fitness have been changing in recent years. This is reflected in new approaches to local authority leisure provision²⁵ as well as the response by individuals. Health has shifted away from being focused on the avoidance and treatment of ailments to being a positive force for enjoying, extending and controlling one's life. Increasingly it is about a holistic approach to lifestyle and overall well-being. As a result, health is now seen as:
- preventing illness
 - reducing stress²⁶
 - easing symptoms
 - influencing diet²⁷
 - broadening interests
 - achieving potential
 - enhancing quality of life
 - trying new experiences
 - staying active longer.
- 3.89 The history of National Parks is fundamentally rooted in their potential to regenerate body and soul. The new branding for Britain's National Parks reflects these core values. It is a theme that should be prioritised within the Brecon Beacons. A health and well-being strategy is required embracing tourism, as well as the needs of the resident markets with the start of the process being a workshop convened to discuss the opportunities.

(m) Visitor Involvement with Conservation and Voluntary Payback Schemes

- 3.90 One of the requirements of the Europarc Charter is to encourage visitors to contribute to the conservation of the Park's resources. This can involve a number of different schemes ranging from holiday activities and packages where visitors are involved in conservation projects, to what are known as voluntary payback schemes which secure net addition income from visitors specifically to invest in community, environmental or other conservation-focused projects.
- 3.91 The Park is already the venue for a range of volunteer activities involving organisations such as the Ramblers, the Wildlife Trusts, the National Trust and British Trust for Conservation Volunteers. There is no record of the extent of this activity and the BBNPA is encouraged to establish a database in order to quantify this effort.
- 3.92 There has never been a political appetite in Britain to impose a local bed tax and/or a sales tax on top of a national taxation. Successive UK governments have consistently rejected calls to generate additional revenues that could be fed back into the industry in this way.

²⁵ See for example: *New Approaches* in Leisure Manager, April 2002

²⁶ Stress related illness has affected 26% of the population in the past year according to the ONS and resulted in 6.5 million lost working days. 95% of GPs and 50% of adults in the UK believe stress negatively affects health.

²⁷ Britain now has the most obese population in Europe with over 50% being overweight.

- 3.93 In the absence of any formal precept applied on tourists for the benefit of tourism, a number of destinations have introduced a voluntary payback initiative of some description. These different schemes have all, to varying degrees, proved successful. Their experiences in managing these schemes provide key lessons to be applied when developing a new scheme for a destination.

“Visitor payback is a term which means the process of visitors choosing to give money to assist the conservation or management of places they visit. The term refers to voluntary giving rather than a compulsory payment such as a local tourist tax. As such, visitors are able to gain a sense of well-being from their actions”.

- 3.94 In recent years there has been a growing body of evidence that tourists are willing to pay ‘extra’ for good causes and projects that have a direct, positive impact upon the environment or community where they are staying or visiting. A number of hotel groups now apply a voluntary opt out charge added to a guests accommodation bill for a particular charity.

- 3.95 Obtaining money from tourists on a voluntary basis to help maintain services and facilities used by them during their visit is not a new idea. For many years donation boxes have been used at rural car parks, in churches and at historic sites. These have relied upon the visitor making a conscious decision to contribute either a suggested sum or an unspecified amount.

- 3.96 One of the most successful voluntary tourism levies in the UK is managed by the Tourism and Conservation Partnership in Cumbria, focusing primarily on the Lake District National Park. In the order of £170,000 will be raised in this way from 180 participating businesses (and other sources) in 2006/7, the majority of which is invested in conservation and access improvement schemes.

- 3.97 However revenue should not be the sole motivation in starting a scheme. Visitor payback is not a get rich quick scheme, nor is it just a fund raising mechanism. Rather it embodies a symbiotic relationship between place and the visitor. The non financial benefits are significant.

- 3.98 Good practice and published guidance from a number of destinations and sources exists:

- (i) The work of the Tourism & Conservation Partnership based in the Lake District (involving a site visit and a seminar/workshop held in Aviemore);
- (ii) A review (August 2005 by Stevens & Associates) of visitor payback/voluntary levies in 20 areas, including:
 - Peak District National Park
 - Exmoor National Park
 - Isle of Wight
 - South Hams District, Devon
 - Suffolk Coast
 - Yosemite Association, USA
 - Balearic Islands Eco Tax

- (iii) 'Visitor Payback Schemes: How to Make Them Work – A guide for tourism officers' published by the English Tourism Council (June 2001);
- (iv) Tarka Project 'Visitor Payback Project' 1997 (www.tarka-country.co.uk);
- (v) Sustainable Travel & Tourism, 'Spain's Balearics Approve Tourist Eco Tax' (www.sustravel.co);
- (vi) The Tourism Business Council of South Africa's one percent voluntary tourism levy (www.tbcsa.org.za) on all accommodation charges;
- (vii) By far the most important source of information on Voluntary Payback Initiatives has been the work of Scott and Christie on behalf of the Countryside Council for Wales. It is entitled 'Charging for Conservation: Visitor Payback', March 2002 and has identified the following key issues for a VPI:
 1. The importance / necessity of a 'feel good' factor for visitors participating in visitor payback schemes;
 2. The need to directly involve the tourist, environmental and visitor organisations in a partnership with active dialogue;
 3. The current reluctance of business interests to embrace the visitor payback concept due to its perception as a hidden 'tax';
 4. Significant differences between the preferences of visitor payback techniques from the visitor (opt in / opt out and donations) and business focus groups (merchandising and membership);
 5. The need for clear aims and objectives in a visitor payback project pertaining to conservation and visitor involvement (not income based);
 6. The need to present clear, unambiguous information about a conservation visitor payback project to the visitor;
 7. The need to have a flexible and complementary approach to the use of visitor payback techniques suiting a chosen technique to the needs of the tourism industry and visitor preferences with a valid project;
 8. The need to channel visitor donations into conservation projects and not lose them in administrative costs;
 9. The need for administration and professionally managed visitor payback schemes;
 10. To develop payback projects that are sustainable in terms of the project and the agency administering the scheme;
 11. To have a lead organisation that can command legitimacy and public support.

3.99 There are seven main categories of payback schemes:

- (1) **Voluntary Supplements** This is regarded as the most effective way of raising money.
- (2) **Percentage of Fees** Businesses donate an agreed percentage of fees. This works well for non-accommodation tourism businesses.

- (3) **Collection Methods** Fundraising events or collection boxes/envelopes in hotels, car parks, trails, etc. These schemes are notoriously poor for raising money.
- (4) **Corporate Sponsorship** There is significant potential to develop specific schemes for particular sponsors.
- (5) **Participation** Visitor participation in conservation activities whilst on holiday. There is scope to introduce such packages.
- (6) **Membership** Visitors and, indeed, residents pay an annual membership fee to support environmental and community improvements. In return they receive newsletters and destination information. Although costly and time consuming to service, this is a good customer relations exercise and may be particularly suitable in a day visitor focused destination.
- (7) **Merchandising** Specifically produced and branded goods.

3.100 The key lessons from all the examples of good practice are as follows:

- Keep the scheme as simple as possible for the businesses, for the visitor and for the destination;
- Introduce one method of raising money at first then allow it to evolve, grow and broaden;
- It has to be appealing and straightforward for the visitor;
- Beneficiary projects have to be 'sold' to the visitor which means they have to be agreed at an early stage.
- Beneficiary projects have to be real, visible, accessible, achievable and relevant all parties
- Experience suggests that 98% of visitors are prepared to pay if approached sensitively.

3.101 Market research indicates that there is consumer willingness to pay. The 2004 survey by the Cairngorms NPA revealed that "61% of tourists are willing to donate money to help local conservation causes". This response is entirely consistent with the findings of other studies, together with the outcomes of projects which have been implemented around the world. Examples of findings of other studies include:

"63% of all consumers stated that a well-managed environment was important when choosing a UK destination and 76% thought their stay should benefit local people".

English Tourism Council, 2004

"80% of British travellers are prepared to pay £30 - £70 extra per fortnight to book a hotel with a responsible environmental attitude".

Futures Foundation, 2006

“80% of UK holidaymakers say it is important that their holiday does not damage their destination’s environment. 75% say it is important that their holiday benefits the destination”.

MORI, 2000

3.102 The challenge is to establish an efficient method of operating a voluntary payback initiative that works for visitors, businesses and the destination. An initial pilot project would be valuable once a mechanism has been agreed. The aims of the project would be to:

- Raise funds from visitors via tourism and other businesses to maintain and enhance the appeal of the BBNP;
- Undertake improvements to the environment as well as its community facilities and services, thus benefiting residents and visitors alike;
- Promoting awareness of sustainable tourism by demonstrating that a responsible approach can benefit conservation, culture and secure a strong base for prosperous, local businesses;
- Provide a coordinated and collective approach that brings together a wide range of interests in a way that maximises the local benefits from tourism.

3.103 The benefits of a VPI for BBNP would be:

- This is a win-win-win situation for visitor, business and destination;
- These schemes give tourists and businesses a ‘feel good’ factor;
- They result in real, visible and practical improvements on the ground;
- Payback can access previously ‘untapped’ sources of funding;
- There are significant PR benefits for businesses and destination;
- Visitors can become involved in projects helping to generate loyalty, repeat businesses and higher levels of satisfaction;
- Traditional suspicion and ambivalence between conservation/community interests and tourism can be reduced;
- Creates a strong public statement about sustainable tourism in action.

3.104 It is recommended that research on the feasibility of a VPI scheme is undertaken.

(n) Fforest Fawr Geopark

3.105 The Fforest Fawr Geopark was designated by UNESCO in 2005. This is a European and Global designation and has considerable potential importance to tourism. It comprises the western half of the National Park from the Central Beacons to the western boundary.

- 3.106 There is no suggestion that specialist geological tourists will form more than a minor additional market (although, for some businesses, this may have particular niche potential). Rather, the Geopark should aim to provide a mechanism for enhancing awareness of an area which has been somewhat neglected in tourism terms. It gives it a particular focus and will encourage new programmes of activity especially in terms of information, interpretation and education. Properly marketed, these activities will in turn attract the sort of visitors who either have not been aware of the west or who have felt there was insufficient to attract them.
- 3.107 The Geopark incorporates some of the most stunning attractions in Wales – in many ways it is more impressive than the east. Visitors will be able to discover how the Geopark area has developed over vast swathes of geological history, how this impacts on the soils, vegetation, farming and local communities of today. The implications all this has for the future in view of CAP review, rural development and climate change are stories waiting to be told in exciting new innovative ways.
- 3.108 These stories (as well as technical geological and earth sciences programmes) will be of great interest to schools, universities and colleges who can be encouraged to use the area in a sustainable manner. Clearly the residential market for these groups will have particular potential and a cluster of businesses catering for these groups should be encouraged.
- 3.109 But the Geopark is not just about education - there are many opportunities for walking, cycling, and outdoor activities, with several businesses already operating in this area. The development of such activities can be encouraged under the Geopark banner and indeed this process has already begun with a series of Geotrails being produced for publication in 2007. Further tourism products will be generated as part of the Geopark Action Plan implementation.
- 3.110 Then there is the distinctive local culture (particularly with the Welsh language being strongly retained), interesting history, good local food and high quality shopping available all of which should be supported through Geopark.
- 3.111 Businesses are already actively involved in the Geopark partnership and this should be further encouraged. As with other National Park tourism products, the involvement of local people/businesses will be key to getting it right for visitors and the programme of familiarisation should be maintained and developed.
- 3.112 If Geopark is able to help the area sell what it already has more effectively, then it will have achieved a great deal. The key challenge will be to integrate the Geopark concept with the rest of the National Park's tourism development work so that maximum advantage is gained for the area without duplicating effort in terms of product development, training or marketing.

(o) Visitor Information, Interpretation and Education

- 3.113 The provision of high quality information, interpretation and education is key to the successful integration of tourism into the National Park. If visitors find interesting and accessible information easily available they are more likely to enjoy their visit, leading to return visits and recommendations to others. Not only that but such information effectively forms one part of the tourism 'product' that can be marketed to potential visitors.

- 3.114 BBNPA has a duty to inform and educate visitors about the special qualities of the Park both to increase their awareness of those special qualities and to enhance understanding of the need to conserve protected areas. Significant resources are already devoted to this activity primarily through its Visitor Services section through guided walks, visitor/information centres, education programmes, information print, signage and interpretive events.
- 3.115 In addition many partners (both public and private) produce high quality materials and there is important that maximum benefit from this work. Appropriate information from all partners should be distributed equally in centres and via the web.
- 3.116 The *Visitor Information, Interpretation and Education Strategy* (2003) identified a range of opportunities for improving the efficacy of existing provision. It was produced as a strategy for the National Park as a whole and promotes the idea of partnership delivery but with the NPA as lead body on many of the actions – particularly the development of partnership working.
- 3.117 **PUBLIC SECTOR PROVISION** Since 2003, many of the strategic actions have been delivered, particularly in terms of restructuring the Visitor Services section as the key delivery mechanism. This restructuring has brought new staff in with the ability to develop detailed work plans to meet the strategic aims. An Interpretative Action Plan has recently been approved and is now being implemented whilst the equivalent for Education is at an advanced stage. That for Information is still under development.
- 3.118 Of particular importance following the review undertaken for this Sustainable Tourism Strategy is the need to address the following key issues:

Information

- Generate the Information Action Plan in partnership with other providers
- Implement the new brand across all visitor facing material
- Make quality information on all aspects of the National Park's culture, environment and heritage easily accessible to all visitors
- Ensure that appropriate partner and community generated information is available in NPA centres and via the website alongside that of the NPA
- Pursue the concept of partnership information provision, particularly within the 'Zone of Influence'. Cardiff is particularly important in this regard.
- Maintain and develop the distribution of NPA information to tourism businesses
- Work with partners to develop community and centre based information and interpretation provision
- Ensure the NPA website has high quality, accurate and up to date visitor information
- Ensure Geopark information development fulfils the needs of visitors and links into wider National Park information objectives
- Incorporate sense of place guidelines into all information provision
- Develop training and communication programme with all those involved in information dissemination about the Park
- Maintain programme of guided walks
- Develop the material available to support understanding and enjoyment

Interpretation

- Utilise the interpretive themes developed to take forward the key messages about the National Park
- Implement the Interpretive Action Plan in partnership with partners
- Implement the new brand across all visitor facing material
- Experiment with new ways of delivering information and interpretation in cost effective, efficient ways,
- Use new technology where appropriate but ensure that personal engagement is encouraged;
- Ensure that information and interpretation promotes 'sense of place'
- Plan/fundraise for major redevelopment of the National Park Visitor Centre
- Develop the role of the Craig-y-Nos Visitor Centre
- Ensure Geopark interpretive development fulfils the needs of visitors and links into wider National Park interpretation objectives
- Develop guided walks and events in partnership with other bodies
- Incorporate sense of place guidelines into all interpretive provision

Education

- Develop and implement the Education Action Plan in partnership with other education bodies and businesses
- Strengthen the significance of the National Park as an environmental resource capable of meeting the needs of the formal educational system, as well as the increasing market opportunities for lifelong learning
- Develop the education service to both visiting and local schools in order to increase understanding of the National Park and its environment and promote a culture of understanding about the National Park's special qualities and a sympathetic attitude towards their long term protection
- Develop education within and about the Geopark
- Maintain close links with the Outdoor Education Centres and other Local Authority outdoor educational programmes to ensure that key educational messages about the National Park are communicated

3.119 This range of opportunities will continue to require a significant allocation of resources. They are, however, primary mechanisms needed to achieve the long-term goal of sustainable tourism development.

3.120 **Private Sector Provision** The private sector is collectively in touch with far larger numbers of visitors than the public sector is ever likely to be able to communicate with. It therefore has a key role to play in terms of delivering information, interpretation and education. In some cases this is part of their formal offer – such as the residential centres that offer paid for learning courses or the attractions that interpret their particular speciality to visitors. In others, perhaps the majority, the communications are informal – the chat over the breakfast table, the request for recommendations of where to go for a particular activity, the conversations about what it is like to live here. There is a real opportunity for public and private sectors to work together over these communications. The 'sense of place' guidelines make an excellent starting point for this work.

3.121 For the relatively small number businesses that incorporate interpretation and education into their formal offer, their significance makes it vital that links between them and the public sector are maintained in the way that links between public sector providers is important.

- 3.122 For businesses in more informal contact with visitors, there are opportunities to cooperate over the information and messages that can be communicated. This is already taking place with training events on outdoor activities, wildlife and local food giving information for businesses to pass on to their customers. In addition, some groups of businesses (eg ponytrekers) have been provided with specific training on the landscape their customers pass through in order to enhance their product.
- 3.123 In addition, however, it would be valuable to develop an integrated programme of training about landscape development/management, wildlife, history, culture, attractions/activities and so forth, delivered in an exciting innovative way. This is has the working title of the National Park Ambassador scheme. It seems likely that the Sense of Place project could contribute towards this and discussions with them, NPA, Medrwn/TPMW and Tourism Association should be progressed. Giving businesses some form of certificate for having taken part in this programme may be an added incentive to take part.

(p) The 'Accessible Tourism' Market

- 3.124 With an aging population, it is anticipated that the number of visitors with disabilities will rise. With the excellent transport links the Brecon Beacons enjoys and the non-challenging nature of its terrain, the destination is in a prime position to take advantage of the market for accessible tourism if it invests in meeting their needs.
- 3.125 The destination has a real opportunity to develop a reputation for good accessibility as part of its brand. This will have to be based on genuine high quality provision on the ground, both in terms of countryside facilities and those in towns and buildings, and in awareness and understanding of the issues faced by disabled visitors on behalf of visitor facing staff. Indeed it could be said that influencing the perception of those staff (both public and private sector) is a far more important task than implementing any particular change in infrastructure.
- 3.126 It is therefore desirable that a programme of awareness-raising is developed for visitor facing organisations – whether public or private – through which the concept of an 'accessible destination' is promoted.
- 3.127 The biggest physical problem facing disabled visitors, as identified by the Brecon Beacons Disabled Access Steering Group (DASG), is a lack of accessible tourist accommodation. The requirements of the Disability Discrimination Act means that businesses have to make reasonable adjustments to enable access for such visitors. This should be turned into maximum competitive advantage. Equally all public bodies are already developing their own accessibility work and the needs of the destination should be borne particularly in mind in this.
- 3.128 The work undertaken by the NPA in terms of organising the Disabled Access Steering Group (DASG) is very helpful in this regard and should be developed. There is need for more information to be generated of assistance to disabled visitors and this could be a key task for this group. The existing 'Easier Access Guide' should be regularly reviewed and updated by this group and, if practical, distributed free to all tourism businesses and be freely available via the website. In addition DASG's advice should be sought over ensuring that the Visitor Guide and area marketing print is helpful to users.

- Encourage visits from individuals with specific needs who have previously been challenged by access to sustainable leisure or tourism activity
- Develop a programme of disability awareness-raising for visitor facing organisations, promoting the concept of an 'accessible destination'
- Develop and implement public sector Disability Equality Schemes with the needs of visitors in mind
- Encourage the improvement of accessibility in the private sector
- Develop and market NP information specifically for disabled visitors, particularly the Easier Access Guide
- Develop partnership work over advice to visitors with disabilities

(q) Social Inclusion

3.129 It is important that as many different types of people as possible are given the opportunity to enjoy the National Park. This cannot be a market led or commercial exercise and so does not fall within the conventional definition of tourism. However this work is important in ensuring that the National Park does not become the exclusive preserve of one section of society and that groups of people do not feel excluded. It is also generally wise to encourage as many different market segments to be interested in your product as is possible. In any case, the NPA is committed to developing links with disadvantaged and excluded communities in and around the National Park.

3.130 Together with the other two National Parks in Wales, BBNPA has recently produced a Social Inclusion Plan which aims to:

- Embed social inclusion in the three Park Authorities;
- Develop an inclusive local agenda, promoting social and economic development within the Parks and their adjoining areas.

This particularly encourages the involvement of the more disadvantaged communities in and around the Park. An Action Plan lays out future work.

3.131 **Mosaic** - The NPA's commitment is partly expressed by its involvement in the Mosaic project, working with ethnic minority communities in Cardiff and South Wales. This project facilitates visits to the National Park from these communities and trains leaders who then themselves organise trips to the area. This work is important in its own right but also introduces new people to the National Park experience and thus broadens the markets who appreciate the product.

3.132 **Beacons Bus** In addition, the Beacons Bus project enables the considerable numbers of South Wales residents without access to a car to experience the National Park. Survey work has shown that around 50% of passengers could not have visited without the service.

- **Outdoor Education Centres (OECs)** - The Brecon Beacons have long been a destination that local authorities, particularly from southern England and Wales, have used for outdoor education. Indeed 14 maintain outdoor education centres for their sole use. Whilst their patronage is by no means confined to socially excluded individuals, many of their clients fall into that category and are thereby introduced to the outdoors in general and National Parks in particular often for the first time. This greatly raises the

understanding of the National Park across the UK and frequently leads to repeat visits by families and in later life, adults.

(r) Training and Familiarisation

- 3.133 Over the past 4 years, the NPA and Medrwn have worked in partnership to deliver a programme of 15-20 training days to meet business needs and to introduce them to the new activity products, local food projects and new facilities as they have been developed. These have been warmly welcomed by the trade and have been well attended. They have been experiential with tourism businesses being given the chance to try out such activities as horse riding or walking in nature reserves that their customers would be interested in. In this way they are experiencing the National Park directly, have a chance to find out about National Park issues and learn more about the conservation side of the NPA's work. Business related courses such as web design or database management have also been extremely popular. The business training already includes such subjects as Welcome Host (customer service award), the importance of grading, marketing, use of web, use of photography etc and these should continue.
- 3.134 It would be desirable to develop this work with an analysis of business training needs via discussions at the Tourism Partnership.
- 3.135 The so-called NP Ambassador Scheme has been proposed in Para 3.139 to enable businesses to confidently interpret the area to their guests and provide information to meet their needs. This should be developed as part of the annual training programme. Giving businesses some form of certificate for having taken part in this programme may be an added incentive to take part.

(s) Quality Assurance

- 3.136 It is of vital importance that every aspect of the tourism experience is delivered at as high quality as possible and that customers' perception of quality increases over time. Surveys show that Wales has a reputation for low quality. The need for quality stretches across the public-private divide and involves everyone that is providing facilities and services that visitors use.
- 3.137 It remains a long term aim to identify and deliver customer care training to all visitor facing staff but in the meantime the following programmes are essential to the development of quality provision and should be promoted to public and private bodies:
- VisitWales/AA accommodation grading programme
 - Visitor Attraction Quality Assurance Scheme
 - Tourist Information Centre Charter
 - National Parks Visitor Centre Quality Scheme
 - Green Dragon or other Environmental Accreditation Scheme
 - National Governing Body accreditation for outdoor activity providers
 - AALA accreditation for activity providers engaged with under 16 year olds
 - Welcome Host
 - Walkers & Cyclists Welcome
 - BHS Horse-riders Welcome

(t) History & Culture

- 3.138 History and Culture presents a significant resource for tourism across the National Park with castles, churches, village festivals (Eistedforddau) and two major theatres in the area.
- 3.139 In addition, there is considerable activity being undertaken to the south of the National Park to develop the industrial heritage of the South Wales Valleys as a tourism product. Much of this either does or could involve the NPA as a partner as both the geographical areas involved and the impacts created spread across the borders. This is particularly true of the World Heritage Site at Blaenavon whose boundaries extend well into the National Park and where a partnership based access project is currently being developed.
- 3.140 Whilst it is unlikely that a major campaign on History and Culture can be resourced during the period of the current strategy, it is important that marketing and information development do not ignore this arena, that links to existing activity are maintained and that emerging opportunities are grasped. In due course, it would be valuable if a strategy for partnership development of heritage and cultural tourism could be drawn up and implemented.

(u) The Importance of Festivals and Events

- 3.141 The Welsh Assembly Government fully recognises the potential of events to help develop tourism and stimulate rural regeneration in its National Events Strategy (2004). The Brecon Beacons has three well established signature events²⁸ whilst the Greenman Festival at Glanusk is beginning to become well established on the national stage:
- Brecon Jazz Festival;
 - Hay-on-Wye Literature Festival;
 - Abergavenny Food Festival.
- 3.142 Each makes a significant contribution to awareness of their destination and provides the area with an influence that extends beyond the 'period' of the event itself. The events generate both new and repeat tourism visits creating an excellent platform for potential year-round activity.
- 3.143 Over the years festival organisers have undertaken occasional research as to the economic impact of these events. It would be useful if this type of assessment was done on a more regular basis. This would assist the organisers in securing ongoing support and funding, as well as creating baseline data to help develop new initiatives and programmes. Tourism Partnership Mid Wales is actively pursuing research in this area.
- 3.144 Whilst it is recognised that, over the years, each of these major events have faced significant challenges in terms of their viability, there now appears to be a greater level of stability and professionalism within their organisations. This, in turn, is leading to a stronger ability to plan for the future, greater levels of

²⁸ A signature event is an event which is uniquely connected to a particular place and has a national or international reputation for its quality and the brand positioning the event brings to the venue or host community.

confidence and the development of more expansive programmes of activities. Organisers are now actively planning to extend these festivals in terms of their geographic coverage and their timings.

3.145 These are important developments that will benefit tourism development in the Brecon Beacons. There is scope, however, to harness this potential to achieve an even stronger impact. This can be developed strategically in two ways:

- (i) The existing event organisers being supported and encouraged to develop their core interest across the Park as a whole. So, for example, Abergavenny Food Festival could lead and champion the development of the food and drink product in the Park;
- (ii) The potential for other towns to develop a signature event to complement the existing provision and enhance the Brecon Beacons brand position generally should be explored, with an initial meeting being convening in each location and using representatives from existing successful events to 'tell their story'. For example:
 - Abercraf to host a Geotourism Festival;
 - Llandovery to host a walking or heritage festival;
 - Llandeilo to host an arts and crafts festival.

3.146 The development of signature events in these communities would help stimulate tourism development in the western section of the Park, as well as raising the profile of the area through new marketing and PR opportunities and achieving community engagement.

(u) Marketing Segmentation and Strategy

3.147 **Primary Growth Markets** These are markets with potential for growth over next five years and which meet the strategic aims of (i) extending the season, (ii) increasing yield and value retained and (iii) have interest in products for which Brecon Beacons has some comparative advantage:

- General short and extended leisure breaks;
- Activity holidays including organised formal activities, as well as informal activities such as cycling, walking, horseriding, fishing;
- Special interest breaks especially wildlife, heritage and culture, geology, food / drink, art / craft and conservation work;
- Short breaks for business and management training / team building.

3.148 In terms of the visitor profile for these activities the particular targets should be:

- Active seniors / empty nesters;
- Early retired;
- Young couples without children;

- Social groups including young professional, early retired, lifelong learning groups and field study groups.
- 3.149 **Traditional Core Family Market** The market research available tends to suggest that families are not a major market, particularly amongst staying visitors. This may be due to the relatively small number of family attractions, particularly indoors, making it a difficult area to entertain children. This is changing with the Brynich Play Barn and Cantref Adventure Farm developing recently and Dan yr Ogor Caves being established for some time. These types of development should be encouraged where sited appropriately.
- 3.150 It is important that the needs of families are provided for in the delivery of National Park information. This is already incorporated into the development of activities products with the easier grades of activity being targeted at families and young children. Equally there may be opportunities to develop other family specific products such as a 'Family Guide to Pubs and Restaurants' to support the catering product. These opportunities should be exploited.
- 3.151 This market is, however, particularly strong in terms of the main summer season and is especially important for caravan and camping providers. There is some evidence to suggest that this market now comprises the additional holiday (spring and autumn) and involves extended breaks. The core markets are families with younger children and the Brecon Beacons provides good opportunities for families to participate in a range of outdoor activities in a safe and, relatively, non-extreme environment with ease of access and value the key.
- 3.152 **Secondary Markets** - These markets include day visitors as well as some staying segments whose volume and value is important to the Brecon Beacons but is more limited. These markets should still be addressed through relevant marketing and product development. Day visitors offer considerable scope for conversion to short break tourists. The key markets are:
- Overseas visitors, notably the Irish markets and Northern European activity seekers;
 - VFR markets whose interest should be focused on outdoor activities and events;
 - Day visitors with the potential to add value through (i) packages and (ii) conversion to short stay;
 - Groups.

Management of Tourism Impacts

- 4.01 It is a vital part of both the proper management of a UK National Park and the Charter process that the impacts caused by tourism are managed appropriately and sustainably. The economic benefits delivered by tourism must themselves not destroy the resource on which that tourism is based. That resource is most tangibly environmental – the landscape, wildlife, footpaths, air/water, etc – but is also cultural and based on community values.

(a) A Partnership Approach

- 4.02 It is critically important that the development of tourism is undertaken hand in hand with measures to manage its impacts, so that the protected area is not put under excessive pressure and damage results. This process requires a partnership approach whereby conservation interests, tourism organisations, recreation bodies and land managers work closely together. This process underlies the whole of the National Park purposes and many different strands of work to achieve this are coordinated by the National Park Authority.
- 4.03 **National Park Management Plan** At the heart of this process is the National Park Management Plan which is a partnership document produced after very extensive consultation with local communities, local businesses, Non-Governmental Organisations, landowners and managers, public sector partners and local people. It lays out a vision for the National Park on a 5 year basis, dealing with all aspects of its management from conservation to visitor management and aims to incorporate all organisations work, not just that of the National Park Authority.
- 4.04 The most recent plan is appended. It covered 2000-2005 and is therefore currently under review. The National Park Authority is required to carry this out and all those who live in, have responsibility for or enjoy the Park are being called upon to be involved in it. Stakeholder workshops took place in October 2006 and public meetings will be held around the National Park in January 2007. A Draft National Park Management Plan will be available in July 2007. The Sustainable Tourism Strategy will assist in the development of the Plan and the recommendations of this strategy should be incorporated into the NPMP. Equally it is important that tourism businesses have appropriate input into NPMP.
- 4.05 **State of the Park Report & Strategic Environmental Assessment** Closely linked to the above Plan, the SoPR charts a wide variety of indicators on a 5 yearly basis, many of which have relevance to sustainable tourism. They are compiled in association with all relevant partners. Equally the Strategic Environmental Assessment carries very detailed data on a wide number of indicators many of which are relevant to sustainable tourism. Tourism will need to contribute to the development and monitoring of suitable SoPR/SEA indicators

for inclusion in future work. Further potential indicators are laid out in Appendix 1. Both these indicator sets will be revisited on at least a 5 year basis.

- 4.06 **National Park Forums** There exist a series of Forums in which the policies and practices of visitor management (amongst a wide variety of other issues) are discussed with different audiences. These include:
- **Area Advisory Forums** Set up to allow detailed discussion of local issues as well as National Park wide developments, there are 3 AAFs, all chaired by an NPA Member. They meet twice a year and visitor management/tourism initiatives come to them on a regular basis. Community interests are well represented as are the NGO sector.
 - **Local Access Forums** Again there are three LAFs, whose remit covers access and rights of way, their management and promotion. Membership covers recreation interests, land managers, conservationists and local people.
 - **Community Forums** Once per year all community representatives are invited to a policy development forum again on a three area basis.
 - **Tourism Conference** This annual event allows significant discussion with tourism interests over new approaches to visitor management as well as the development of tourism. It is workshop based and has some 100 participants each year.

(b) Monitoring Of Tourism Impacts

- 4.07 **Biodiversity** The protection of the area's wildlife is a core concern for the NPA and other key public sector partners. Flora and fauna are regularly monitored for adverse impacts through the mechanism of the Biodiversity Action Plan, State of the Park Report, the Strategic Environmental Assessment and National Park Management Plan. All SSSIs and Natura 2000 sites should be regularly monitored for 'favourable condition' and recreational impacts are included in that monitoring. The Walking Tourism Strategy indicates methodology for seeking to avoid conflicts between walkers and wildlife. Monitoring data is fed back into the management process by the land managers.

(c) Supporting Historic Heritage, Culture and Traditions

- 4.08 **Events** By encouraging visitors to take part in activities organised by local communities and by supporting those activities financially and physically, partners contribute towards the retention and development of local culture. This process is referred to elsewhere under the heading of Signature Events but also goes wider than this.
- 4.09 **Events Support** The NPA earmarks a proportion of its Sustainable Development Fund to supporting local community events. In addition TPMW supports selected events through grant aid. These events are open to visitors as well as local people and indeed the income visitors bring to them helps keep them running. From the visitors' perspective they provide a valuable insight into the local community and introduces them to local traditions and way of life.
- 4.10 **Events Information** Mid Wales Tourism and BBTA run websites that publicise local events. It would be useful to develop this information system so that it is easily available in TICs, accommodation etc. Events generally need a higher profile.

- 4.11 **'Sense of Place' Project** This programme was established by the former Wales Tourist Board as a means of encouraging tourism businesses to be part of their local culture and to celebrate it in their work. The philosophy behind the project is entirely in line with that of this strategy and the programme should be brought into the training organised between the NPA and Medrwn/TPMW.
- 4.12 **Welsh Language** The Welsh language is an important part of the National Park's culture, particularly in the west of the area. There have been concerns elsewhere in Wales that tourism has had a damaging effect on the language and there is an inevitable risk of this occurring, especially if combined (as it is here) with increased immigration of English speakers. However if Welsh can be celebrated as part of the area's 'sense of place' then there is every hope that the culture can be reinforced and even valued as part of the tourism resource.
- 4.13 If tourism is to confer positive benefits to the language and to the local communities that can benefit from it, an approach based on product development, training and marketing is needed. If every visitor is greeted simply in Welsh (even if the speaker is primarily an English speaker), if visitors can be helped to understand and pronounce the language, if pubs advertise the fact that you can hear Welsh spoken, if Welsh language is used on simple print like menus and, most importantly, if tourism operators express positive attitudes towards the language then the interest of visitors can be captured. Once engaged, visitors will undoubtedly value the fact that the area they are visiting has this remarkable culture and will enjoy hearing the language spoken naturally.
- 4.14 The task of developing a tourism that celebrates the Welsh language will not be quick or easy. It is recommended that discussions are held at a community level as part of the process of developing IQM and that each community finds its own way of meeting its needs and aspirations. In addition 'Sense of Place' workshops should focus on the use of the language with the aim of incorporating it into the tourism culture. The priority should be the businesses and communities in the west of the National Park and it may be that Geopark can be used as a vehicle for this.

(d) Preserving Natural Resources

- 4.15 **Partnership Action** The first statutory purpose of the NPA is to 'conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park'. In order to preserve natural resources, the NPA works in close partnership with a large number of different agencies, public and private, through a wide number of different processes. Local Authorities, Countryside Council for Wales and the Environment Agency are particularly important in that regard. In the extreme, the NPA has the powers under Section 62 of the Environment Act 1995 to require other public bodies (including those managing air, energy, land and water) to comply with policies and procedures that will comply with that first purpose.
- 4.16 **Environmental Accreditation** It is an important feature within any destination seeking to become more sustainable that tourism businesses and visitor facing public bodies are seen to be operating as in as environmentally friendly a way as possible.
- 4.17 **Private Sector** In Wales the Green Dragon scheme run by Arena Network has been adopted by Visit Wales as their preferred environmental accreditation scheme and the NPA has been promoting this since 2003 in partnership with them. To date 68 businesses have been accredited and it should be made a

priority to maintain this programme of development. Green Dragon is only one scheme that could be promoted however and options should be kept open.

- 4.18 In addition businesses need incentives to take part in such programmes. BBNPA have developed a marketing campaign based on the booklet 'Stay Somewhere Green' and backed up by advertisements in environmental magazines. Secondly there is a discount for those accredited in this way for advertising in the NPA's Visitor Guide.
- 4.19 As well as recruiting businesses to Green Dragon, the NPA has run training courses in matters such as energy conservation or recycling. There is a group of interested businesses that it is hoped will develop into a full cluster group and this is to be encouraged.
- 4.20 **Public Sector** Both the NPA and Powys County Council are engaged in the Green Dragon process currently whilst the YHA and NPA education centres are becoming Ecocentres.
- 4.21 **Renewable Energy** The issue of renewable energy in a protected area is not always easy as many forms of energy production can have negative impacts on landscape and conservation values. However the NPA as planning authority has produced guidance on small scale renewable energy developments which is supportive within the context of the landscape and community priorities. In addition, through the NPA's Sustainable Development Fund, the Brecon Beacons Solar Club and other renewable initiatives have been established promoting the use of renewable energy, giving advice on construction, planning and grants.

(e) Community Impacts

- 4.22 **Community Involvement in Tourism/Visitor Management** Local communities through their community councils and regeneration groups have been invited to all workshops and conferences organised as part of developing this strategy. In addition they have been invited to the annual Tourism Conferences and have participated fully. The new structures will enable them to have their voice heard more strongly in the development of tourism.
- 4.23 More generally, all community groups are involved in the development of:
- the NPMP which determines visitor management and similar policies,
 - the Local Development Plan governing planning
 - Local and County Community Strategies, many of which address tourism.
 - Area Advisory Forums
 - Community Forums.
- 4.24 The NPA sends the biannual Action for Tourism newsletter to local community groups and also distributes an occasional community newsletter on the general development of its work.
- 4.25 Local people have many opportunities both to learn about tourism development and to voice their opinions about tourism, recreation and visitor management.

Through these mechanisms, conflicts can be identified and the resolution of difficult issues discussed.

- 4.26 **Community Engagement** Working with local communities is critical to the long-term success of this Strategy, particularly in sustainability terms. We need to engage the enthusiasm of local people so that they can define and develop the sort of tourism they feel is appropriate for their area and manage the benefits and disbenefits that will flow from this choice.
- 4.27 Elsewhere in this strategy, the concept of locality based cluster groups is promoted. These should be encouraged to form close links with the wider communities particularly through Local Community Strategies. These are a means both of promoting the importance of tourism to local people and of planning the future development of their area. Many potential conflicts can often be resolved at this level.
- 4.28 The IQM process is ideal for applying at a local community level as it ensures all aspects of tourism development are addressed. The weakness of any particular sector within a destination can detrimentally affect the success of even perfectly run businesses. Resolving these issues through a coordinated approach is the essence of IQM. This should be promoted through locality tourism clusters and other community processes.
- 4.29 **Local Employment** Whilst there are relatively low rates of unemployment in the National Park, there is emigration particularly of young people to the cities. Tourism is a valuable industry in that it can be lowly capitalised and so has a relatively low entry threshold for new enterprises. This can be attractive to a wide variety of people, some of which are returning to Wales having lived away.
- 4.30 In addition the industry can be very attractive to those with family responsibilities as it can take place at home (for an owner-manager) or have part-time work available, suitable for those with childcare responsibilities.
- 4.31 Lastly, in order to retain commitment to sense of place, it is desirable that local staff are retained rather than hiring from abroad. This is not always possible as the pool of local labour is limited but local people tend to be knowledgeable about their local area and often are very effective in communicating this knowledge. Local staff also form an invaluable link to their local community and provide a clear community benefit from tourism development. Employers including the public sector should be encouraged to advertise locally for staff, particularly in visitor facing roles and commit to their retention, training and development.

(f) Control of Development

- 4.32 The National Park Authority is the development control body for the protected area and implements local and national planning policy through its staff and committee structures within its duty to protect and conserve the National Park's special qualities. Potential development is directed towards those settlements that can best accommodate growth in terms of environmental capacity and access to services.
- 4.33 The NPA works closely with its partner authorities within the protected area to ensure comprehensive policy development and implementation as well as with the planning authorities adjacent to the National Park boundaries to ensure consistency. In this, it is assisted by its powers under section 62 of the

Environment Act 1995 which states that adjacent Authorities must take into consideration the protected area status of the National Park and any cross border impacts. These issues are particularly important within the area immediately around the National Park.

- 4.34 In its planning work, the NPA is guided by three principles in relation to tourism:
- to ensure that tourism businesses have a chance to develop physically and economically;
 - to protect the environment which forms the basis of the tourism industry;
 - to ensure local people have a chance to influence the development of their community.
- 4.35 Development policy within the National Park is set out in the development plan. The statutory Development Plan is currently the Local Plan (adopted May 1999). The Unitary Development Plan (UDP) will supersede this once it is itself adopted – estimated at early 2007). Both have been subjected to extensive consultation including a public inquiry into the objections to the UDP in 2005. Meanwhile work is commencing on the next plan – the Local Development Plan (LDP). The LDP process involves even wider public consultation and engagement.
- 4.36 Specific policies encourage the reuse of redundant buildings, the use of local materials, high design values and the protection of historic buildings of conservation importance. In addition there are specific policies in relation to local development of renewable energy sources – encouraging them where they are important for local sustainability but preventing them where they would impact negatively on landscape values.
- 4.37 In this way sustainable development that meets the aspirations of local communities is enabled but the environment which forms the basis of the tourism industry is protected.

(g) Visitor Management

- 4.38 **Principles** Perhaps the most important task that the NPA engages in is the management of visitors both physically and by good communications. The policies relating to visitor management are laid out in the National Park Management Plan. These were developed following widespread consultation and stakeholder involvement and this process is being repeated within the current roll forward of the NPMP. In addition, a wide number of stakeholders have been involved in the development of both this Tourism Strategy and the 2005 Walking Tourism Strategy, both of which have major implications for visitor management. The key message to come through these processes is that the development of tourism products should be done in close consultation with conservation interests and the NPA Area Management Teams. These staff should use monitoring undertaken to determine the sensitivity of sites to additional visitor pressure. The species data based at the Biological Information Centre is potentially very helpful in relation to this but will need extra refinement to enable this to be used as the sole planning tool.
- 4.39 **Active Management** The most important expressions of this work are:

- promotion of activities that are inherently likely to be sustainable and in tune with the special qualities of the National Park - walking, fishing, cycling, horse riding, fishing etc.
- promotion of these activities in locations that are robust enough to sustain the pressure created
- avoidance of the promotion of sensitive areas by consultation and discussion with area NPA staff, landowners and conservation interests
- high quality management of promoted routes/sites
- strategic planning of rights of way management via the RoWIP/Walking Tourism Strategy
- strategic management of upland path network via the Upland Erosion Action Plan, in partnership with landowners and conservation interests
- high quality information and interpretation provision engaging with visitors' natural wish to protect the places they are enjoying
- high quality information provision around sustainable visitor activities
- engaging with marketing to ensure appropriate brand values are projected to encourage visitors and activities sensitive to the needs of the area, planning activity around authentic images
- development of codes of conduct or equivalent to regulate those legal activities potentially damaging to the environment
- active working with landowners, the police and legitimate motor-sports interests in curbing illegal and destructive motorised recreation
- improvement of access/recreation resource for those with disabilities
- Incorporate visitor management principles and actions in the new National Park Management Plan and ensure their implementation
- Maintain close working relationships between recreation development interests and those of conservation
- Implement management recommendations within RoWIP, WTS and upland paths management programme
- Incorporate appropriate visitor management actions into site management plans
- Develop information, interpretation and tourism product development priorities within an analysis of route/site sensitivity
- Manage routes/sites promoted by the NPA to a high standard
- Curb recreation liable to be destructive to conservation interests by good wardening, development of codes of conduct and partnership working with landowners and (where appropriate) local police

- Work towards increasing access and recreation for those with disabilities
- 4.40 **Conservation Site Management** All conservation sites should have their own management plans. As these are developed or renewed, it is important that visitor management is addressed and that prescriptions are communicated to those involved in developing visitor information.
- 4.41 **Codes of Conduct** Where an activity is judged sustainable in its own right but can cause damage if conducted in a less than responsible way, the conflict is often resolvable through the agreement of a code of conduct. This is particularly true for organised groups of visitors and especially so if led by a business. At present there is a code of conduct relating to climbing at Llangattock Hillside and a zoning agreement for different watersports at Llangors Lake.
- 4.42 There is urgent need for discussions around a Code of Conduct to cover gorge walking in the Waterfalls area in view of its SAC status and for a more general code for those walking in the uplands. It is likely that Geopark will need to develop its own codes in relation to geological conservation as usage develops.
- 4.43 **Visitor Monitoring** It is important to monitor visitor numbers in order to set visitor management priorities and tourism facility development as well as preventing damage and over-exploitation. Six areas of monitoring are currently undertaken:
- **Upland Footpath usage** Hidden counters sensitive to walkers' movements are in place and are monitored annually. They can produce data that is analysable on an hourly basis but in general seasonal trends and annual counts produce the most meaningful data. The aim is to work in partnership with bodies such as National Trust who generate compatible data to ensure that as comprehensive a dataset as possible is available to indicate changing patterns of use in time and space.
 - **Lowland Rights of Way Usage** Similar counters are in place in individual sites on rights of way to give site specific data for cycling as well as walking. Horse riding monitors are planned.
 - **Car Park Monitoring** A mixture of hidden counters and car parking ticket sales enable the use of specific car parks to be monitored and analysed.
 - **Visitor/Information Centre Footfall** Visitor numbers at centres are monitored annually
 - **STEAM** Annual statistics on the tourism economy are collated using the STEAM model. These are based on returns gathered from the tourism industry. They form the basis of an analysis of tourism performance of and give modelled figures for gross income including indirect spend, spend by sector, visitors numbers, visitor days and employment. They are linked to traffic numbers but the model is relatively insensitive to local transport initiatives.
 - **Visitor Survey** A survey was undertaken in 2005 as part of the preparation for this strategy and gives a measure of qualitative factors as

well as customer satisfaction. This survey should be repeated, ideally on a 2 yearly basis but not less than every 5 years.

- 4.44 **Car Parking** The consultations highlighted the need for (i) more informal car parking facilities linked to rights of way and (ii) strategic facilities within villages or close to transport interchanges. These would allow car-borne visitors to make greater use of public transport provision as well as encouraging local communities to gain benefit from visitor activity. This analysis should be incorporated into the development of the National Park Management Plan and Unitary Development Plan.
- 4.45 In addition, the security of car parks was raised as a key issue. The area has had problems with vandalism and theft in car parks which, if allowed to develop uncontrolled, would deter visitors. There is a new Car Park Watch scheme to try and manage this problem. This is a partnership between the NPA, Forestry Commission and the Police and involves trained and supported volunteers acting as a deterrent presence in vulnerable car parks within the National Park. They are also able to help visitors with information and interpretation. This scheme should be maintained and developed.

(h) Sustainable Visitor Transport

- 4.46 Car dependency in the Brecon Beacons is very high. There is no train station within the Park although the gateway towns of Llandeilo, Llandovery, Abergavenny and Merthyr are all served by rail. The Heart of Wales line from Swansea to Shrewsbury in particular offers visitors a distinctive visitor experience and a means of accessing the Park.
- 4.47 The Park's Management Plan 2000 – 2005 and the document *Future Directions* (2005) clearly sets out the BBNPA's aims, vision and strategic intentions with regards sustainable transport. Its objectives are:
- Encouraging the provision of a sustainable transport network that enhances opportunities for local communities and visitors whilst reducing the reliance on private vehicles by:
- Working with partners to increase the sustainability of transport within the Park;
 - Encouraging the use of public transport;
 - Supporting initiatives that reduce travel demand.
- 4.48 BBNPA has an important role to play influencing Local Transport Plans in order to achieve these goals. This influence will be strengthened by a partnership approach and further evidence of an uptake in visitor use of these services.
- 4.49 **Partnership** Although a wide variety of different partners have been involved in the Beacons Bus project, there has not been a formal partnership approach to its development. A key recommendation of the 2005 TAS report was that such a partnership should be established and moreover that it should look more widely at developing public transport with visitors in mind.

- 4.50 **Strategy** Ideally there would be a Visitor Transport Strategy based upon best practice and innovation. If an opportunity for funding this became available, this should be regarded as a high priority. This Strategy would influence each of the new Regional Transport Authorities' Regional Transport Plans, thereby integrating the provision for local people and visitors as much as possible. This would require wide-ranging consultation and support and the commanding of significant resources for implementation.
- 4.51 In the absence of such a strategy and the resources for implementation, the current approach is informed by the TAS report (2005) and rests on:
- Ongoing expansion and extension of existing, proven success stories particularly Beacons Bus
 - Experimentation and the piloting of fresh initiatives, particularly as far as the weekday services are concerned
 - The development of partnership working to enable this work to proceed
- 4.52 **Beacons Bus** In 2005 the report 'Sustainable Transport in National Parks'²⁹, prepared for the Countryside Council for Wales, concluded that Beacon Bus was, whilst modest, a 'significant achievement with the BBNPA commended for having maintained a successful working partnership with a number of local authorities over seven years'. The report concludes that the goal should be to build upon the progress to date by:
- Increasing the period of operation in order to capture new markets and to encourage repeat business;
 - Formalising existing partnerships and more closely integrating the scheme with other initiatives.
- 4.53 Beacons Bus has recorded increases in use at around 30% for each of the past three years. It is now calculated to bring in some £83,000 per year into the local economy from tourism spend. Although it is primarily a day visitor service, it has established the reputation of visitor public transport in the area and gives an excellent platform from which to build further work. It should be developed and extended as a summer Sunday and Bank Holiday service aimed at day visitors from South Wales and the Marches. Modal shift of 50% has been achieved which is very helpful in its own right but also indicates that the service enables a significant number of people without independent means of transport to visit the Park.
- 4.54 Good examples of tourist travel products which have been developed as part of *Beacons Bus* include:
- *Bike Bus* from Cardiff;
 - *Offa's Dyke Flyer*;
 - Point-to-Point Walks leaflets / routes.

²⁹ CCW Sustainable Transport Advisory Service Report No 43, *Sustainable Transport in National Parks* by Owen et al.

- 4.55 **Visitor Transport Information** Central to the success of this overall approach has to be the coordination of information for visitors about public transport and opportunities to enjoy the National Park. Currently the NPA produces two public transport booklets. The 'Discover Guide' gives details of attractions and days out accessible using public transport. It was published in 2003 but since then resources have not been forthcoming to reassess the information in it and reprint sufficient quantities for mass distribution. It is still available but tends only to be used by those specifically asking for this type of information. The 'Travel Guide' gives details of bus timetables within the area and is printed annually.
- 4.56 In addition, the NPA's annual Visitors Guide carries two pages of information on visitor transport, looking to persuade people to use buses once they are here as well as travelling to the area using public transport.
- 4.57 As prescribed in the Walking Tourism Strategy, public transport information should normally be included in all relevant visitor information print – especially where site specific information is being given. The current web-based information should be maintained and expanded, with a transport specific website being of high priority.
- 4.58 **Weekday Visitor Transport** Now that Beacons Bus has proved its worth, the major challenge is to find ways of developing the use of the weekday network. This is likely to prove even more demanding in terms of communication but, as the Walking Tourism Strategy showed, the network currently supported by Local Authorities (together with limited commercial routes), provides a remarkably good service for a rural area. It is certainly a product that can be promoted to visitors and should be built upon over time. Indeed it is the weekday network that will provide the services that the key target markets of staying visitors need in order to develop income into the area.
- 4.59 As identified in the TAS 2005 report, the development of this work will require extra staff resources. A package of work should be drawn up and partnership funding sought to take these forward. These should be largely marketing based but will involve coordinated action particularly between local authorities and the new regional transport authorities.

Actions within existing resources:

- Establish and develop Visitor Transport Partnership
- Develop and extend the Beacons Bus concept
- Maintain Travel Guide or equivalent
- Reprint Discover Guide
- Maintain existing web pages
- Establish stronger public transport links and opportunities to access events especially the major events in the Park

Actions as resources allow:

- Develop Visitor Transport Strategy

- Develop visitor transport website
- Implementation of bus / rail / taxi projects;
- Develop a comprehensive Marketing Strategy linked to providing quality information for visitors;
- Link the key centres and attractions in the Park with those outwith the Park boundaries, such as the World Heritage Site, the National Botanic Gardens, as well as the gateway tours at the periphery of the Park;
- Encourage tourism enterprises to develop public transport based holiday packages;
- Encourage tourism enterprises to develop business tourism packages based upon the use of public transport;
- Developing visitor use of weekday public transport systems / services;
- Developing an integrated taxi / public transport initiative.

(i) Marketing & Branding

- 4.60 **Branding** Whilst the issues about the organisation of marketing are discussed elsewhere, there remain some important principles to establish in relation to the management of visitor impacts. In essence, if the marketing of the area uses authentic images and branding then it is likely to attract those visitors who will enjoy the area for its special qualities. Visitors who are attracted by those qualities are then more likely to cooperate in its conservation and protection, engage with and value its local communities whilst also contributing to its economic development.
- 4.61 These principles were indicated by the recent branding study undertaken on behalf of the UK National Parks which was shortly followed by work applying it to the Welsh National Parks. This work was done in partnership with Visit Wales and this has ensured that the brand is integrated with both the Wales brand itself and that developed for Mid Wales.
- The brand rests on the dimensions of Stretching, Precious and Inspiring
 - Photography supports these, showing people involved in the landscape
 - Images and text show activities sustainable in time and place and landscapes and features that are in favourable condition for conservation
 - Partner such as Visit Wales, RTPs and Area Marketing Partnerships will be encouraged to use the brand to promote the National Park in their campaigns
- 4.62 **NPA Marketing Activity** Whilst the NPA is not a destination marketing organisation, it does have significant influence on market perceptions of the area and does indeed undertake some limited marketing itself. Indeed, it currently produces the only Brecon Beacons specific print that there is. This should continue and develop in close discussion with the trade and partner organisations. It is important that the activity products under development are

marketed as widely as possible, that the Visitors Guide is used as an aid to marketing and that www.visitbreconbeacons.com is promoted as the main portal site for visitor information, maintaining links to collective private sectors sites – tourism associations, themed and location clusters, etc

Vision, Strategy and Action Plan: 2007-2016

(a) Tourism Marketing and Destination Analysis

- 5.01 The Brecon Beacons is a generic term applied to a relatively wide and amorphous area of land that is perceived to sit between Mid Wales and industrial South Wales. The name association tends to embrace an area of land including the Black Mountains, the Brecon Beacons, Epynt Range and the Black Mountain – only part of which is actually designated as a National Park. Clearly the brand identity is wider than the designated area.
- 5.02 The Brecon Beacons has been an iconic, distinctive but informal brand for many years. It has been represented in the market as a sub brand of the VisitWales brand and has been particularly honed in terms of the UK domestic markets. However until recently, it has not been presented in branding terms as a National Park, arguably reducing its impact.
- 5.03 Indeed a lack of awareness of the Brecon Beacons can be found. Market research undertaken for the *Information Interpretation and Education Strategy* in 2003 revealed that only 50% of non-Park users in places like Cardiff and the West Midlands were aware of the National Park status and only 43% appreciated where it was located.
- 5.04 On the other hand, a recent study of UK perceptions of the tourism appeal of South Wales³⁰, found that approximately a quarter of the GB population would consider the region as a holiday destination with the Brecon Beacons being identified as the third most well-known destination (59%) after Cardiff (83%) and Newport (73%). The Brecon Beacons, however, record the second highest score as a destination that respondents would consider as a holiday destination after Cardiff. This response was especially positive in the ABC1 and 45+ markets.
- 5.05 This research also concluded that the key aspiration for the bulk of the short break UK markets is to get away from it all for a few days ... within an attractive environment with comfortable accommodation, nice places to eat and with heritage, culture, some walking and interesting shopping. The strength of the area is regarded as the beauty of the environment and landscape.
- 5.06 The visitor markets clearly recognise that the Brecon Beacons area is an attractive area to visit but if only 40% appear to directly associate these values with National Park status it suggests that the Brecon Beacons has been regarded more as a brand than a destination.

³⁰ Strategic Development Market Research for Capital Region by Senior King, January 2004.

- 5.07 Visitor trip patterns, together with the distribution of tourism facilities, enterprises and services, also reflect an area comprising a series of destinations within a landscape linked by routeways rather than a connected, integrated, single destination.
- 5.08 Acceptance of this geography is fundamental to the future organisation, structure and management of tourism in the National Park. It recognises that the National Park itself resides within a wider, complex landscape of tourism activity with an array of destinations whose geography only partly includes the protected area. This creates a challenge for the development of tourism marketing in the area and highlights the importance of adopting a partnership approach to destination marketing.
- 5.09 BBNPA is not a tourism marketing agency although it does promote its own facilities, services, events and activities. Tourism marketing is primarily the role of other public bodies and the private sector.
- 5.10 The VisitWales UK Marketing Area No 5 covers Mid Wales and the Brecon Beacons. This is likely to remain the main geographic marketing entity for the foreseeable future within which the brand of the Brecon Beacons is developed. However tourism marketing in both South East and South West Wales acknowledge the importance of the Brecon Beacons to them either because it is in fact within their patch or because visitors staying locally can use it for day visits. It is important to work closely with all marketing partners to develop the potential of the brand and the destination.
- 5.11 Given that the markets are not particularly influenced by the precise nature of the designated area but rather the values attached to the protected area status as a National Park, then generic marketing of the Brecon Beacons is acceptable. Within this framework the NPA has developed a customer-facing brand which captures the specific values of National Park designation within the context of the UK and Wales National Parks brands. This is now available for partners to use.
- 5.12 Marketing the Brecon Beacons will involve the wider area and, therefore, will require a large number of organisations, individual businesses and various marketing groups to be involved. There is scope for greater collaboration and a coordinated approach to marketing the area. Within this structure there will be scope for destinations within the area to develop tactical marketing activity and for special interest or sectoral groups to develop their own marketing plans. The NPA should convene a meeting of the three RTPs to discuss how best to develop this collaborative approach.
- 5.13 In this context the role of BBNPA should be to:
- Facilitate brand development;
 - Assist the coordination of local groups;
 - Undertake research to influence marketing activities;
 - Provide in-destination quality visitor information to support the marketing activity;

- Ensure that National Park brand (including the conservation oriented dimensions) are incorporated in marketing activities.
- 5.14 There is an important need for better market research to inform the delivery of this strategy particularly in terms of market trends, customer expectations and the identification of new markets, as well as ongoing monitoring and review:
- Improved 'volume and value' data (continue use of STEAM for near future);
 - Enhanced understanding of perceptions/expectations of visitors and non-visitors;
 - Visitor satisfaction surveys at the community and Park level;
 - Enhanced understanding of the business of tourism in the Park including issues such as seasonality, yield and patterns of visitor behaviour;
 - Specific market research to examine niche markets and their requirements.
- 5.15 The underlying principle is that the sustainable tourism strategy has to be informed by market analysis and market research. Product development has to reflect the needs of the marketplace whilst respecting the interests of the environment and the community.

(b) A Destination-Based Approach

- 5.16 The main local destinations within the Park are based upon the following key settlements:
- Abergavenny
 - Crickhowell
 - Blaenafon
 - Llandeilo
 - Llandovery
 - Brecon
 - Hay-on-Wye
 - Talgarth / Llangors
- 5.17 In each of these destinations there is a critical mass of tourism-related attractors, services and infrastructure. They have the potential to perform several different but important roles in terms of sustainable tourism development and most are strategically located around the periphery of the Park on main routeways. Their roles can include:
- The **heart** of a local destination;
 - A **hub** for overnight tourists who can explore the Park from this base;
 - A **gateway** to the National Park for touring and transit or tourist day visitors;

- A **stopover** location for touring visitors;
- A **focal point** for festivals, retail and other services;
- **Nodal points** for public transport.

Each of these roles is valid for each destination all of the time as they have to service the needs of all markets all of the time.

- 5.18 At present there is a different lead body in each of these communities but the nature of this local leadership is, at this stage, unimportant. What is important is that there is a lead body in each destination representing and / or bringing the disparate tourism interests together.
- 5.19 The overall strength of the Brecon Beacons as a successful sustainable tourism destination is highly dependent upon the strength of its component parts. As a result, a fundamentally important role for partners is to support and nurture these key settlement destinations and to facilitate the setting up of appropriate local bodies where none exist at present.
- 5.20 Many of these destinations include communities and land outside the designated area but which are integral to the tourist experience. BBNPA has already developed the concept of *zones of influence*, creating a dialogue and networking with stakeholders involved in tourism within a wider area as well as the wider Tourism Zone beyond the NP boundaries. This process will only be an extension of these concepts. This will however mean that is fundamental that partners are deeply involved in these developments.

(c) Emerging Strategic Opportunities

- 5.21 There are a number of initiatives taking place in or around the Park which present significant opportunities entirely complementary to the objectives of this strategy. The partnership approach and new organisational structure allows these opportunities to be fully embraced.
- (i) The establishment of a regional park as part of the regeneration strategy for the Valleys, together with the investment in the World Heritage Site at Blaenafon and the growing importance of the Heads of the Valleys corridor as an access route and focal point for regeneration;
 - (ii) The designation of the Geopark creating a platform for innovative product development that can bring fresh momentum to the west of the Park;
 - (iii) The growing emphasis in policy terms of the health agenda and sustainable transport. The partnership has the potential to develop practical and innovative responses to these issues;
 - (iv) The development of new markets and products around well-being and local food/drink;
 - (v) The demand for accessible tourism

- 5.22 The challenge for the future is going to be to find ways of integrating these new opportunities into mainstream activity in a cross cutting way, especially in terms of:
- Well-being;
 - Activities;
 - Interpretation of heritage, culture and the environment.

(d) Synthesis of Findings

- 5.23 Over the past five years there have been numerous initiatives which have helped develop the tourism profile and product in the Brecon Beacons. These activities have been underpinned by a suite of strategies designed to coordinate action and align investment through a partnership approach. Undoubtedly this process has been significantly enhanced by the Wales Tourist Board's designation of Tourism Growth Areas, the BBNPA's appointment of sustainable tourism specialists and the commitment of the Tourism Partnership Mid Wales to the Brecon Beacons as a major resource and tourism asset.
- 5.24 It is widely recognised by public agencies, tourism enterprises and community groups that there has been considerable improvements in collaboration, communication and the sharing of information amongst all involved in tourism in the Park. This is largely due to the important work undertaken by the NPA in facilitating a partnership approach. At the same time the strategies for cycling, walking and information, education and interpretation have established a pragmatic framework for product development.
- 5.25 BBNPA has also demonstrated a far more integrated approach in the delivery of sustainable tourism development in recent times. This has been assisted by closer working across all its departments but especially between Visitor Services and Tourism. As the Planning Authority it is apparent from evidence collected in the trade survey and at the workshops that more tourism supportive policies could be introduced to reflect the needs of a changing rural economy where diversification and market relevant products are needed if the destination is to remain competitive. Clearly this has to be within the context of not damaging landscape and other values.
- 5.26 The NPA and its partners have made significant headway in creating a structure for engaging with the tourism businesses, as well as other public sector stakeholders. The general consensus appears to be that this framework could be refined and strengthened to become more effective, dynamic and representative. On the other hand, some concerns exist about the emphasis upon Area Advisory Forums and the subsequent loss of opportunities to discuss Park-wide strategic matters, especially in terms of matters relating to land management.
- 5.27 BBNPA is widely respected as stewards of the landscape and principal managers of the very resources that give the Brecon Beacons its appeal for tourism. Alongside this is an acknowledgement that BBNPA is not a marketing organisation and that its resources have to be focused upon its statutory responsibilities. In this context there appears to be general appreciation that BBNPA is fundamentally important in helping maintain the environment within which tourism businesses can develop with confidence.

- 5.28 On the other hand, there are concerns about a number of important aspects of the infrastructure which is essential to support a sustainable tourism economy. These concerns relate to the quality, management and investment in public amenities, maintenance of public rights of way, directional signage and the general aesthetics of town and countryside. As a result, there is a desire to see the public sector, especially the local authorities, invest further in these aspects.
- 5.29 The market research has highlighted that the overall appeal of the Brecon Beacons is the ability to engage in a range of relatively gentle, non extreme, outdoor activities combined with dining out and shopping, against the backdrop of splendid, high quality landscapes. Markets, especially for short break leisure tourism, tend to be older with relatively high levels of disposable income and a desire to 'get away from it all'. For these markets, quality and added value are normally more important than price. Equally, access to a range of quality experiences will be more important than being satisfied with one particular product or activity.
- 5.30 This analysis has major implications for the development of tourism in the Brecon Beacons, namely:
- There has to be an emphasis upon improving the quality of all aspects of tourism products and services;
 - There has to be an increasing range of easily accessible products, notably accommodation, outdoor activities, dining out and specialist retail;
 - There is a requirement for market-led investment in product for which there is an identified gap in supply and unsatisfied demand, notably art and cultural facilities, access to local food and drink, heritage tourism, wildlife tourism, adventure and outdoor activities.
 - There has to be a greater commitment to the delivery of an integrated, connected and high quality visitor experience, especially:
 - visitor information and assistance
 - accessible and bookable packages
 - a culture of welcome
 - access management
 - product knowledge amongst customer facing staff
 - public transport;
 - Better understanding of tourism trends and tourism markets through better quality, more focused research;
 - The development of customer relationship marketing and management.

(e) Vision for Tourism in the BBNP

- 5.31 In summary, therefore, the Brecon Beacons National Park includes many examples of initiatives that follow international best practice in sustainable tourism development. There are organisational structures which provide a firm foundation upon which to develop more effective partnership working. There is

also a wide range of activities guided by well researched strategies and action plans which are guiding product development and marketing.

5.32 As a result of the consultations with local businesses and tourism operators, along with representatives of public and voluntary organisations, a common, shared vision for tourism has been identified. This clearly sets out the values of the area. It is founded upon analysis of market trends which clearly demonstrate that the Brecon Beacons is a valued destination of choice.

5.33 **The vision** for tourism in the National Park should be that:

“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.”*

5.34 The **primary objectives** of this strategy to achieve this vision are, therefore:

1. **Product Development** Continued investment in well researched, planned and coordinated product development based on the natural strengths and culture of the area implemented through a partnership approach
2. **Market Research** Continually improving the understanding of tourism trends, market behaviour and the business of tourism within the Brecon Beacons area through a coordinated approach to research
3. **Marketing** Collaborative marketing activities based on the newly defined brand values.
4. **Managing the Visitor Experience** Further development of the integrated approach to delivering a high quality visitor experience within the area based upon a collaborative and coordinated approach.
5. **Managing the Impacts of Tourism** - It is important to the sustainability of tourism in the National Park that the impacts it potentially can cause are managed so as to reduce negative impacts and increase positive ones.
6. **Organisational Structure** Refining the organisational structure to help create a stronger partnership approach involving all key stakeholders, the implementation of improved communications, consultations and delivery of strategies / programmes / actions.

(f) Organisational Imperative

5.35 The biggest challenge to emerge from this analysis is that the Brecon Beacons needs to take charge of its own destiny. This means shaping its future as a destination with an organisational structure and approach that best suits the needs of the National Park and its visitors.

- 5.42 **Public Sector** At present tourism within the Park is being pulled in many different directions. The political geography does not make it easy to develop and to deliver coherent tourism development. It is expected to comply with a multiplicity of strategies and plans which affect different parts of the Park and involve many local authorities and many tourism bodies. For example, it resides in three different Regional Tourism Partnership areas and is covered by three different strategies. It is hoped that this should become simpler within the Spatial Plan process.
- 5.43 However the area is one of Wales' best known brands/destinations as has already been evidenced. It needs to be able to act as a coherent destination through agreement of strategic aims amongst key stakeholders and implementation by partnership working.
- 5.44 To all intents and purposes, the RTPs agree that the National Park should be regarded as a destination within the Tourism Partnership Mid Wales area at least for administrative purposes. This however must not prevent Capital Region Tourism and South West Wales Tourism Partnership from taking full advantage of the brand. They must be able to include marketing messages and align product development to take advantage of the Brecon Beacons' profile. This cooperation should be developed further.
- 5.45 Similarly, the ten local authorities which have a direct interest in the Park need to be engaged as key members of the partnership and should be involved in agreeing the needs of the destination so that they can include policies and work programmes that support the coherent Brecon Beacons approach.
- 5.46 **Private Sector** Within the private sector, there was a Brecon Beacon's Tourism Association which closed down in 2000 with the arrival of the Beacons Trust. As a backdrop to the development of a partnership approach the existence and history of the Beacons Trust cannot be ignored.
- 5.47 The **Beacons Trust** was established following a large public meeting at which the proposal to establish an industry led, sustainable development charity was well received. Its subsequent Board was comprised of the larger tourism businesses in the Park. Its existence, in part, led to the demise of the Brecon Beacons Tourist Association as it purported to represent the voice of the industry.
- 5.48 It soon became apparent that general sustainable development was peripheral to the Trustee's objectives and the deployment of public sector funding was being scrutinised whilst, at the same time, personal relationships deteriorated. After a thorough review in 2002, BBNPA decided to develop its own tourism work by employing a dedicated officer itself. The Beacons Trust finally folded in 2003.
- 5.49 The lessons from this experience have shown that:
- (ii) Any private sector led representative body should involve a broader cross section of the trade (geographically, sectorally and in terms of the size of business);
 - (iii) Representatives have to show a clear understanding of the principles of sustainable tourism development and demonstrate corporate social responsibility;

- (iv) There is a desire to work together in the context of developing the Brecon Beacons as a brand and as a destination.
- 5.50 **Tourism Associations** In 2006, partly as a result of this study, a new Brecon Beacons Tourism Association has been established building on the work of Beacons Active. This has been universally welcomed and has the full support of all partners.
- 5.51 There are also a variety of community based tourism groups such as Hay, Abergavenny, Llandovery and Crickhowell. At present there is no mechanism for bringing such groups together but any moves to do so would be valuable.
- 5.52 There are also a number of Tourism Associations covering larger areas, mostly well beyond the extent of the National Park. These include Mid Wales Tourism, Carmarthenshire TA and Neath Port Talbot/Swansea TA.
- 5.53 Alongside this geography, there are representative bodies for some sectoral groups within the National Park. The **Association of Bunkhouse Operators** is particularly active and has done much good work to raise the profile, quality and professionalism amongst its dozen or so members. **Beacons Active** aims to represent the adventure activity providers. The initiative is strongly supported by BBNPA due to the importance of this sector to the Park and its environment. Finally, there are nascent **Green Dragon** and **Horse Riding cluster groups** emerging with support from BBNPA.
- 5.54 In 2002 the BBNPA established the **Brecon Beacons Strategic Tourism Partnership** to guide the development of tourism. The Partnership reflects the fragmented political nature of the Park and the need to have a vehicle to bring all the key stakeholders together. At present the membership of 27 consists of:
- The three RTPs
 - The nine Welsh local authorities, together with Herefordshire
 - Countryside Council for Wales
 - Welsh Development Agency
 - Youth Hostels Association
 - Brecon Action
 - Carmarthenshire Tourist Association
 - Forestry Commission Wales
 - Mid Wales Tourism
 - Six trade representatives
 - National Park Authority
- 5.55 The Partnership is convened by BBNPA which is committed to creating a genuine partnership approach which will ensure that there is shared ownership of this Strategy and its implementation.
- 5.56 In addition there is a parallel organisational structure for the Geopark which has a Partnership Board and Management Group structure. In as much as Geopark has been set up in order to assist with socio-economic development via Geotourism (in its widest definition), it is important that these structures interact with the tourism processes and indeed this strategy, and that they mutually inform each other's work.

(g) Partnership Working and BBNPA

- 5.57 Partnership working is the key to the success of this strategy. No one sector or organisation can attempt to implement the whole of this strategy and it would be wrong of it to try to do so. But in any case, the resources available to any one partner for Brecon Beacons development remain relatively low and there is a need to pool what there is for the best advantage of the destination.
- 5.58 It is vital that there should be a clear definition of roles and responsibilities with the effective engagement of key stakeholders. This still needs more clarification and is undoubtedly one of the most important tasks to emerge from the preparation of this strategy. It needs to be addressed urgently.
- 5.59 The National Park Authority has perhaps the most difficult role to define. Its traditional role has been to manage the impacts of tourism development once they have occurred – repairing erosion, erecting signage, providing car parks, agreeing zoning or code of conduct agreements, etc - or to prevent them by enforcing regulations and legislation – illegal motorcycling, inappropriate development, etc. This has been linked to the need to provide information, interpretation and education as a means of enhancing understanding and awareness.
- 5.60 More recently there has been a growing realisation that these strategies are only partially effective and that pursuing a positive agenda of helping people enjoy the area in ways that do not damage it, ensuring that marketing is done in sympathy with the protected area and making links with commercial providers of activities/accommodation is a highly effective way of working.
- 5.61 In addition there has been a parallel development in thinking with the sustainable development agenda becoming much more prominent in National Park management philosophy. Thus there is much more concern than previously that the local population should be able to earn its living in harmony with the environment and with the rest of their own community. In this way, those involved would have a stake in the long term conservation of the environment both as an economic resource and for its own sake.
- 5.62 There is a key role for both senior management and the tourism team within the NPA to ensure that the whole organisation understands the contribution it already makes to tourism and ways in which this contribution could be enhanced. The tourism team already undertake significant internal team working in order to deliver effective organisational delivery for tourism and this role needs to be enhanced.
- 5.63 BBNPA **has a crucial role** to play in terms of sustainable tourism development. This should be to:
- Work with partners to manage the National Park in a way that is visitor friendly, makes the most of links to businesses and protects the most important tourism resource - its environment - applying IQM principles;
 - Develop its own visitor facing operations to the highest standard, taking into account the needs of the primary markets identified in this strategy;

- Through its own work, but also by partnership working, create a policy environment that encourages businesses to invest in market focused, environmentally responsible tourism activities;
- Coordinate communications and partnership working between public, private and community sectors;
- Integrate the work of partners on market research, indicator monitoring and other intelligence gathering so that decision making is based on the best evidence available;
- Develop and implement strategies and action plans within the context of this strategy that facilitate tourism development based on the partnership approach;
- Actively encourage the development of business cluster groups whether geographical or theme based.

(h) Organisational Structures

- 5.64 The Charter for Sustainable Tourism requires the establishment of a forum to guide sustainable tourism development and be capable of resolving conflicts through informed debate and discussion. This forum should involve community and conservation interests and should cover the full range of visitor-related activity.
- 5.65 At present there is a framework for industry and community engagement with tourism development. This includes:
- An Annual Tourism Conference which brings together business, conservation and community groups. This has taken place in 2004 and 2005 and has primarily focused on sustainable tourism development issues. It has also included workshops on information/interpretation, public transport and visitor management. It has been very well received by the trade with around 100 people attending each year and regular events are planned for future years;
 - Quarterly meetings of the Strategic Tourism Partnership as a primary mechanism of information exchange. It takes some decisions but is generally too big a group to do so effectively. At present it does not take on board wider visitor management/impact reduction issues.
 - A biannual meeting of the Tourism Growth Area Steering Group, primarily discussing tourism development issues
- 5.66 This structure has grown organically over the past 5 years and although it provides a strong platform to build, it seems to provide too little opportunity for detailed discussion of future plans. A future structure might look like:
- An Annual Conference similar to that run currently, involving tourism, conservation and community interests and working to a wider agenda;

- A Sustainable Tourism Partnership which meets regularly but infrequently to discuss wider visitor management, impact reduction, information, education, interpretation and tourism development work. This would comprise:
 - Local Authority Tourism officers
 - 3 Regional Tourism Partnerships
 - DEIN (VisitWales and broader Economic Development)
 - Tourism Associations – local, county, regional
 - Community Tourism Groups
 - Trade representatives elected at Conference
 - Public sector conservation and recreation bodies – CCW, FCW, Wildlife Trusts, Woodland Trust, National Trust
 - Representative community organisations – e.g. PAVO
 - YHA
 - Beacons Park Society
 - BBNPA

- A Tourism Development Executive which drives forward the detailed tourism agenda within the National Park. The executive would meet more frequently than the Partnership and would be selected from its membership in a manner to be agreed. It would advise partners on priorities for future work. It would be small (say 10-12) and would comprise individuals representing:
 - Tourism Trade
 - Public sector tourism interests
 - Conservation interests
 - Community interests
 - National Park Authority

5.67 The structures should develop mechanisms for interacting with those of the Fforest Fawr Geopark and Blaenavon World Heritage Site.

(i) Action Plan

5.68 The strategy is aspirational and the action plan is stretching. The achievement of the action plan is heavily based upon the power of working together. Much can be achieved through partnership working, developing networks and stimulating clusters of tourism activity.

5.69 The strategy is integrated across the full range of actions in the following plan. The implementation involves the full range of stakeholders and requires their commitment. A partnership implementation plan will be developed annually to give SMART targets through which actions can be monitored.

5.70 The Action Plan includes activities with differing priority status:

High	Should be undertaken or implemented within a 5-year period, (ie substantially completed by 2012)
Medium	Should be planned to be undertaken or implemented with the 5-8 year period (2012 – 2014).
Lower	Should be scheduled for implementation by 2016.

5.71 The action plan gives approximate costs in the bands (excluding currently available staff time):

High Greater than £100,000 over 5 year period

Medium £20,000 to £100,000 over five year period

Low Less than £20,000 over 5 year period

5.72 There are direct linkages between the action plan and Charter principles. These are shown in the last column of the action plan.

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

Description	Lead	Priority	Cost	Charter Principles	
Objective 1 – Product Development					
1	Continued implementation of existing strategies and action plans for walking, cycling, horseriding, Geopark and fishing, encouraging private sector investment as part of this work.	NPA	High	High	3, 4, 5, 6, 9
2	Develop new action plans/strategies for: i Heritage and Cultural Tourism ii Wildlife Tourism iii Food and Drink iv Well-being Tourism v Business Tourism	i Partnership ii NPA iii NPA iv Partnership v Partnership	i Medium ii High iii High iv Medium v Low	i High ii Medium iii Medium iv Medium v Medium	3, 4, 5, 6, 9
3	Promote the use local and organic food (i) by tourism businesses with campaign of information and events and (ii) by including food promotion and retail information in visitor publications	TPMW, AFP, NPA, Medrwn, Adventa, Gallu	High	Medium	4, 9
4	Promote Arts & Crafts to visitors through marketing/visitor information material	AMPs, NPA	Medium	Low	4, 9
5	Encourage tourism operators and visitor facing public bodies to achieve accredited status in terms of quality schemes, environmental accreditation and other recognised codes of conduct/accreditation schemes	Partnership	High	Medium	3, 4
6	Produce practical guidance for communities and enterprises on how to develop products that are sustainable, fit for purpose, take advantage of new markets and that are innovative	Medrwn/TPMW	Medium	Medium	1, 3, 4, 6, 8, 9
7	Review the role and function of the National Park Visitor Centre at Libanus and Craig y Nos Country Park	NPA	Medium	Low	4, 5, 6, 9
8	Develop hierarchy of lay-bys and car parks linked to the RoWIP/CROW priorities and work towards delivering appropriate improvements (including security) , interpretation, orientation and making them starting points for local walks / trails	NPA, LAs, Highways Authority	Medium	Medium	5, 8, 10
9	Maintain and develop event support mechanisms to improve product and support local culture	NPA, TPMW, LAs	High	Medium	5, 6, 8, 9
10	Ensure that the implementation of this strategy is integrated into that of the Geopark Action Plan	NPA	High	Medium	3, 5, 6, 7

Objective 2 – Market Research					
1.	Continued investment in visitor surveys and STEAM with new research into visitor behaviour in the destination	Partnership	High	Low	4, 10
2.	Access existing research undertaken by the WTB / VisitWales on market trends and futures and make available to key stakeholders	TPMW	High	Low	4
3.	Establish a system to share business-to-business intelligence on trading patterns, yield and customer behaviour	TPMW	Medium	Low	4
4.	Continue to maintain an up-to-date database of all enterprises, businesses and stakeholders, establishing an extranet facility for all businesses and communities and encouraging businesses to build web nets	NPA	High	Low	1, 7, 9
5.	Undertake an international benchmarking exercise looking at best practice in competitor locations including protected areas as a forerunner of organising a programme of learning journeys for stakeholders to examine best practice	Partnership	Medium	Low	7
6.	Establish an agreed set of sustainable tourism indicators and regularly monitor their progress	NPA	High	Medium	10

Objective 3 – Marketing and Promotion					
1.	Agree the brand values and hence the brand for the Park and the creative expression of these values in terms of: Destination and arrival signage and other collateral; Integration and application at the local destination level including; Geo Park; Integration with both the Mid Wales brand and the Wales brand	Partnership	High	Medium	5
2.	Develop a programme of marketing activity external and in-destination information (including: PR, Internet and print items) to promote key themes and products: <ul style="list-style-type: none"> i Outdoor activities ii Well-being and health iii Special interest iv Event-based packages, v Food and drink 	i NPA, BBTA ii Partnership iii Partnership iv Partnership v NPA	i High ii Medium iii Medium iv High v High	i Medium ii Low iii Low iv Low v Medium	5
3.	Review the current range of Internet sites and establish a portal based upon visitbreconbeacons.com with links to other relevant sites. Methods of delivering this information within the destination should be developed.	Partnership	High	Medium	5, 6, 9
4.	Continue to market the Brecon Beacons as a sustainable tourism destination as part of existing area marketing partnerships' work, at a regional level and at a Wales level via VisitWales, using the brand to influence the message delivered	AMPs, RTPs, VW	High	High	5, 6
5.	Continue to use the Brecon Beacons Visitor Guide as an aid to marketing	NPA	High	Medium	5, 6, 10

Objective 4 – Managing The Visitor Experience					
1.	Implement the new revised 'sense of place' tool kit and awareness training incorporating the Park Ambassador concept, Welsh language awareness and local employment issues	NPA, Medrwn/TP MW, Gallu SoP Team	High	Medium	5, 7, 8, 9
2.	Continue the programme of community appraisals as means of community engagement	NPA (TGA)	High	Low	1, 3, 4
3.	Continue to improve public sector within-destination information through high quality literature, local web presence, well managed TICs and fully trained staff. Ensure tourism businesses are supplied with appropriate information for guests to use.	NPA, LAs	High	High	3, 5, 7, 9
4.	Implement the Visitor Information, Interpretation and Education Strategy through annually reviewed Action Plans	NPA	High	High	3, 4, 5, 7, 8, 10
5.	(i) Maintain and develop current business training & familiarisation programme, (ii) developing a Training Needs Analysis through the Sustainable Tourism Partnership	NPA, Medrwn/TPMW, Gallu	i High ii Medium	i Medium ii Medium	4, 7, 9
6.	Encourage greater levels of cross referral marketing and integrated activities including the feasibility of a destination card or passport as part of enhanced / added value visitor experience	BBTA, destination groups	Medium	Medium	4, 9
7.	Encourage greater use of local produce especially food, drink and crafts amongst all tourism operators as part of sense of place development and with an emphasis on quality	NPA (TGA), Medrwn/TPMW, Adventa, Glasu, Gallu	High	Low	9
8.	Encourage tourism businesses to work together to create a suite of branded, integrated, visitor information	Partnership	Medium	Medium	5, 7

Objective 5 – Management of Tourism Impacts					
1.	Incorporate appropriate recommendations of this strategy into the NPMP and Local Development Plan, ensuring that the development control process protects the special qualities of the National Park as a key tourism resource	NPA	High	Low	10
2.	Monitor SOPR/SEA, biodiversity, visitor management and tourism data (i), investigating the formation of a Visitor Monitoring Partnership (ii)	NPA, Land Managers	(i)High (ii)Low	Medium	3, 10
3.	Maintain community liaison and engagement and conservation input into visitor management and tourism developments	Partnership	High	Low	1, 10
4.	Promote environmental accreditation amongst public and private visitor facing organisations	NPA, PCC, Arena, Adventa	High	Medium	3, 10
5.	Develop IQM based engagement processes with local communities, feeding recommendations into community strategies as appropriate	NPA (TGA)	High	Medium	1, 8
6.	Develop activity tourism product development priorities within an analysis of route/site sensitivity, managing routes promoted to a high quality	NPA, PCC, Sustrans, BHS, trade	High	High	3, 10
7.	Plan marketing activity around authentic images and sustainable activities, using the Britain's Breathing Spaces brand across all partners engaged in marketing and information provision	Marketing agencies	High	Low	5
8.	Build in good visitor management principles into RoWIP, codes of conduct and site management planning processes, feeding back information to tourism/information functions, monitor visitor impact at key locations.	NPA, conservation managers	High	Medium	3, 6, 10
9.	Investigate ways of enabling BBS brand to be used by businesses under Part 2 of the Charter	NPA	Medium	Low	3, 7
10	(i)Establish and develop Visitor Transport Partnership, (ii) developing a Visitor Transport Strategy if resources allow	VTP	i High ii Low	i Medium ii Medium	10
11.	Maintain commitment to Beacons Bus	NPA, VTP	High	High	10
12.	Encourage visitor use of weekday public transport (including taxis) by good marketing and information provision, special services, high quality training and sound partnership working;	NPA, PCC, trade	High	High	10
13.	Maintain and develop social inclusion projects, particularly through Mosaic, to avoid destination becoming exclusive	NPA	High	Medium	4

Objective 6 – Organisational Structures and Communications					
1.	Establish an Annual Tourism Forum involving all stakeholders, developing the existing Tourism in Action Conference format	Partnership	High	Low	1, 7, 8
2.	Encourage the development of local destination groups who will be primarily concerned with product development and the visitor experience in their areas based upon Hay, Brecon, Crickhowell, Talgarth/Llangors, Abergavenny, Llandeilo and Llandovery	NPA (TGA)	High	Low	1, 7, 8
3.	Encourage and facilitate further development of Park wide sectoral groups such as the Association of Bunk House Operators under the aegis of BBTA for: Outdoor activities; Food and drink; Attractions; Wildlife tourism; Events	BBTA	High	Low	1, 7, 8
4.	Develop the Partnership to include representatives of each area and sectoral group as they are established helping to create a Park-wide involvement	Partnership	High	Low	1, 7, 8
5.	Establish the new organisational structure and ensure that this interacts with the Geopark structures to mutual benefit.	Partnership, Geopark	High	Low	All
6.	Establish a series of technical task force groups to address the following issues on an ongoing basis : i Market research ii Transportation iii Marketing and branding iv Investment and funding	Partnership	i Medium ii High iii Med iv Low	Low	i – 10 ii – 10 iii – 5 iv - 9
7.	(i) Investigate voluntary payback initiatives based upon international best practice (ii) with a view to implementing a project for the Park	NPA	Medium	i Low ii Medium	3
8.	Within the constraints of national planning guidance, ensure that the planning system includes policies which are sensitive to the development of sustainable tourism and a vibrant sustainable tourism economy (including quality design codes) whilst continuing to protect the special qualities of the National Park	NPA	High	Low	8, 10
9.	Encourage businesses to source their supplies locally by developing a web-based directory of SME goods and services suppliers relevant to tourism businesses	NPA, BBTA	Medium	Medium	9
10	Establish an extranet for improved communications and continuous exchange of information with all stakeholders	NPA	High	Low	1

Cross Cutting Themes					
1.	Promote the concept of an 'accessible destination' with appropriate training offered to the private sector and access related information and infrastructure development by the public sector	NPA	High	Medium	4
2.	Develop mechanisms for encouraging day visitors to stay longer and spend more	Partnership	High	Low	9
3.	Encourage more shoulder and winter season tourism where compatible with conservation	Partnership	High	Low	9

Appendix 1 Developing Indicators of Sustainable Tourism

- There are many examples of indicators of sustainable tourism development at International, national and local levels³¹. The most relevant are those set out by the English Tourism Council (2002). These closely reflect many of the targets set by the Wales Tourist Board in *'Achieving Our Potential'*.
- The following indicators are put forward as ones which could potentially be used to establish baseline data and ongoing monitoring of sustainable tourism development in Brecon Beacons National Park (see Table 5.1). The development of these indicators will need to establish their practicality alongside work being developed on the State of the Park Report & Strategic Environmental Assessment. Ideally indicators should be used for which the data is already being collected. Further investigation will be needed along with the integration of existing measures provided by STEAM and visitor surveys.

Table 5.1: Potential Indicators of Sustainable Tourism Development

Potential Indicator	Measure
Group 1: Protect and enhance the built and natural environment	
1. Number of tourism businesses signed up to environmental accreditation schemes, especially Green Dragon	Number of businesses with e.g. ISO14001, EMAS, Green Dragon
2. Carbon dioxide savings made by the tourism industry	CO2 savings by accommodation providers as a result of installing energy efficiency measures
3. Transport used on holiday trips by UK residents in Brecon Beacons	% of trips by mode of transport (public, private car, hired car, other), use of Beacons Bus
4. Local authorities with Tourism, Biodiversity and Environmental Action Plans	% of local authorities with Tourism Action Plans
5. Ratio of the land and historic buildings protected by national agencies against the amount of money spent on protection of these assets	Ratio based upon information provided by Cadw, FC, CCW, BBNPA, NT
Group 2: Support local communities and their culture	
6a Workforce employed in tourism	% of total workforce; % locals; % Welsh speakers

³¹ These include:

- World Tourism Organisation *'Indicators of Sustainable Development for Tourism'* 2004
- World Tourism Organisation *'Indicators of Sustainable Development at Specific Destinations'* 2004
- English Tourism Council *'National Sustainable Tourism Indicators'* 2002
- Scottish Executive *'Meeting the Needs'* 2006
- Macaulay Institute *'Framework of Indicators for Sustainable Tourism'* 2005.

6b	Average hourly earnings in tourism versus the average national hourly wage	Ratio
7.	Local authorities with LA 21 strategies that include sustainable tourism elements	% of local authorities
8.	Audit of community perceptions of tourism	Survey
9.	Accommodation registered as meeting National Accessible Scheme criteria for disabled people	Percentage
10.	Local authorities with tourism strategies that incorporate environmental, cultural and heritage considerations	Percentage of local authorities
Group 3: Benefit the economies of tourism destinations		
11.	Tourism accommodation enterprises participating in Welcome Host training	Number of tourism accommodation enterprises
12.	Tourist accommodation registered with WTB, AA or RAC Quality Assurance Scheme	Percentage of accommodation
13.	Increase in per capita spend per day and stay visitors	Percentage
14.	Increase in occupancy levels across all sectors of accommodation	Percentage
15.	Increase in number of accredited bedspaces	Percentage
16.	Extent of visitor satisfaction	Survey with 6 point scale from 'not at all' to 'completely' satisfied
17.	Domestic and overseas tourism spend	By month
18.	Contribution of tourism to BBNP economy	Tourism contribution as a percentage of UK GDP
19.	Retention of income in local economy	'Leaky bucket' studies
20.	Composition of tourism sector by business turnover	New factor
21.	Trips and days by UK residents	Total number of trips per month
22.	Ratio of visitors to local residents	Ratio
23.	Number of activity providers registered with the Adventure Activities Licensing Authority	Number and percentage

24.	Occupancy in serviced and non-serviced accommodation by month	Percentage
25.	Number of tourism businesses registered for VAT	Number
26.	Number of new business start ups registered each year	Number
27.	Visitors to heritage and cultural attractions	Number
28.	Number of visitors using Tourist Information Centres	Number
29.	Employment of local people in site management or as guides	Number
30.	Tourist employment by quarter	Number
Group 4: Sustaining Visitor Satisfaction		
31.	Local satisfaction level with tourism experience	Survey
32.	Repeat levels of visitation	Percentage
33.	Perception of value for money	Survey
34.	Number of protected sites with tourism or visitor management plans incorporated into management plans	Number
35.	Amount of local produce consumed by visitors	Percentage