

Brecon Beacons

Sustainable Tourism Strategy 2017-2022

and

Destination Action Plan 2017-2020



**BRECON
BEACONS**
OUR NATIONAL PARK



Ariennir gan
Lywodraeth Cymru
Funded by
Welsh Government

Contents

Foreword from the Sustainable Destination Partnership Board.....	3
1. Executive Summary.....	4
2. Setting the Scene	13
2.1. Current Climate:	13
2.2. Strategic Context	13
2.3. Consultation Results including Survey Summary	22
2.4. Achievements	24
2.5. Partnership and Working Arrangements	26
3. Where we are.....	33
3.1. Demand Factors and Competitive Position.....	33
3.2. Supply Factors.....	36
3.3. Dimensional Analysis for the Brecon Beacons Destination	37
4. Where we want to go.....	42
4.1. Ambition	42
4.2. Vision Statement.....	42
4.3. Destination development	47
4.4. Partnerships and connectivity	48
5. How we will deliver	52
5.1. Action Plan 2017-2020	52
Appendix:	65
STEAM.....
Other Background Documents

Foreword from the Sustainable Destination Partnership Board

There are two ways to define the Brecon Beacons as a destination.....

The first is through its attributes - the lines we find on maps which give shape to the National Park area itself as well as the impressive inventory of topography, geology, built and natural heritage, settlements, tourism assets, organisations and access routes within it.

The second, and more compelling, is through its effects - the inspirational Brecon Beacons, unconstrained by physical boundaries, defined much more by the warmth of the welcome it gives, the special experiences it offers, the unique sense of place it generates and the particular way it makes us feel, whether we are residents, visitors or businesses - this is *our* destination.

As a great start the destination has invested significant time, thought and money into developing its brand. Now is the time to spread adoption of that brand and deliver together on the promises that it makes.

We are proud of the way the partnership between businesses, communities and government is already managing the destination for the benefit of all. This renewed strategy and action plan is for everyone with a stake in tourism in the Brecon Beacons. We hope it will inspire and support businesses and organisations as they develop their own plans

For us, sustainability has to be built-in not bolted-on. Our tourism needs to clearly demonstrate added environmental, social, cultural and economic value

Andrew Fryer Chair of Brecon Beacons Tourism

Elizabeth Jeffreys Chair Brecon Beacons Marketing Coordination Group

Gerwyn Evans Head of Tourism Development Visit Wales

John Cook Chief Executive Brecon Beacons National Park Authority

Richard Tyler Sustainable Tourism Manager BBNPA

Sue Bolter Head of Regeneration Powys County Council

1. Executive Summary

This strategy covers the period to 2022 and the Destination Action Plan to 2020.

Strategic and Operating Context

It is no coincidence that our protected landscapes, especially the National Parks and Areas of Outstanding Natural Beauty, are also the destination brands of choice for so many of Wales' visitors - the immediate appeal and recognition of Gower, Snowdonia, Pembrokeshire, Wye Valley and Anglesey as well as the Brecon Beacons has historically transcended that of the country overall. Brecon Beacons' commitment to and implementation of a sustainable approach to tourism development and marketing is recognised in achievement of the Europarc European Charter for Sustainable Tourism. This strategy will form part of the evidence to be submitted for renewal of that designation in due course.

The strategy acknowledges, reflects and, where relevant, supports the delivery of the following key policies:

- Wellbeing of Future Generations Act 2015
<http://gov.wales/topics/people-and-communities/people/future-generations-act>
- Partnership for Growth
<http://gov.wales/docs/drah/publications/161116-strategy-review-en.pdf>
- The Brecon Beacons National Park Management Plan 2015 - 2025,
<http://www.beacons-npa.gov.uk/the-authority/who-we-are/npmp/>
- The Brecon Beacons National Park Authority Visitor Management Plan 2015
https://www.beacons-npa.gov.uk/wp-content/uploads/oldsite/the-authority/working-in-partnership/tourism-new/BBVMP_FINAL_300913.pdf
- Fforest Fawr Geopark Plan <http://www.fforestfawrgeopark.org.uk/>

- The Blaenavon World Heritage Site Management Plan
<http://www.visitblaenavon.co.uk/en/WorldHeritageSite/LookingAfterBlaenavon/Documents.aspx>
- Destination Plans of neighbouring and constituent authorities

Together with the results of the Brecon Beacons Visitor Survey the following consultations have informed this study:

- One -to-one consultations with a number of key stakeholders in the private and public sector
- Workshop as part of a Brecon Beacons Tourism (BBT) members' meeting
- 3 meetings of the Sustainable Destination Partnership Board (SDPB)
- Workshop with BBNPA staff and members
- Presentation and discussion with Countryside Managers Team BBNPA
- Presentation and discussion with SDP Forum
- Online survey with 100 industry stakeholders responding

Challenges

From the strong views of consultees we captured a number of key specific challenges for the Brecon Beacons destination:

- The extent and quality of the Family Offer especially under-cover alternatives
- Broadening the appeal beyond adventure activities especially culture, heritage, food and drink, events, market towns and villages
- Addressing seasonality - not only times of the year but also days of the week
- In an increasingly 'post- TIC' world ensuring the effectiveness of a more dispersed Visitor Information system using multiple outlets and the Ambassador network
- Closer relationship with retail and encouragement for visitor-friendly opening hours and offer
- What Public Transport is available is not necessarily geared up to support tourism through its route network, time-table or fare mechanisms

- The shared destination website is the key communication mechanism between the destination and the visitor but is still performing sub-optimally

These specific concerns can be encompassed by one overarching challenge -

‘Joining Up’ the destination and the way it works:

- The overall ‘customer journey’,
- ‘Soft packaging’ of access, things to do, hospitality, transport and accommodation,
- Buy-in to the Brecon Beacons brand and
- Streamlining the delivery partnership

Destination Development Achievements from the previous strategy period (2011 - 2016)

- **The strengthening of the Brecon Beacons Sustainable Destination Partnership**
- **The establishment of Rural Alliances (12 in total)**
- **Capacity building and the consolidation of Brecon Beacons Tourism (BBT)**
- **The Ambassador Scheme (150+)**
- **Business Improvement Days**
- **UK’s Greenest Tourism Destination designation**
- **Marketing activity including joint industry/BBNPA destination website**
- **Dark Sky status**
- **New consumer branding**

Supply Factors

Accommodation

According to official figures the accommodation stock within the Brecon Beacons has lost around 0.6% of capacity over the past 5 years with just under 10k bedspaces recorded in 2016. The arrival of Airbnb suggests many more operating ‘under the radar’. The industry survey results would also suggest a turnover of operators given the numbers who have been in business for 5 years or less.

Attractions

While there are a number of independent commercial operations many of Wales' big multiple 'brands' can be found in and around the destination: National Museum Wales (Big Pit is BBNP's most popular attraction), Cadw, National Trust, Natural Resources Wales, Canal and River Trust and of course BBNPA itself.

Activities

The opportunity to take part in formal and informal activities has long been a main motivator of visits to the Brecon Beacons. The South Wales Outdoor Activity Providers Group (SWOAPG) has around 230 members based in Wales and beyond but the vast majority of them are providing adventure activities at various locations within the Brecon Beacons on a regular basis. 60% of members are signed up to the Environmental Charter. It is instructive that SWOAPG came into being, supported through BBT, in response to sustainability and impact concerns at key 'honeypots'.

Tourism Performance

The recent STEAM results for the destination are encouraging....

Category	2014	2015	% Change
Staying Visitors	0.296 million	0.331 million	+ 11.5%
Day Visitors	3.718 million	3.815 million	+ 2.6%
Economic Impact (£m)	221.56	238.93	+ 7.8%
Total Employment	3546	3823	+7.8%

Where we want to be in 2022 - Our Vision Statement

Among Britain's protected landscapes, the Brecon Beacons continues to enhance its status as a leading sustainable destination through the way it develops and markets its tourism offer. It is good to see the private and voluntary sectors taking an increasingly prominent and active role in the partnership that manages the destination and the assets within it. Even better is the enhanced reputation the destination now enjoys for a unique welcome to visitors and improving the well-being of residents while being a 'good neighbour' to surrounding destinations and the many local authority areas with which it shares its footprint. All now appreciate the benefits and added value of the Brecon Beacons experience.

There is a real understanding of what makes and keeps our landscape special shared by those who manage it and those who promote access to it. Outdoor and adventure activities remain a key component of the visitor offer but are now attracting a wider range of ages, aspirations, backgrounds and abilities. These activities are now complemented by a richer story: a confident celebration of the area's living cultural inheritance - heritage and arts, people and personalities, communities and language, market towns and villages, food and produce - brought to life by a self-sustaining network of tourism ambassadors.

More of our visitors are staying overnight, visiting midweek and in quieter months and discovering parts of the destination away from the 'honeypots'. They are drawn by Dark Sky, Geopark and World Heritage Site status, a competitive range of well-promoted 'four-season' experiences and a dependable calendar of festivals and events - all adding to the unique 'Sense of Place'.

Consistent with visitor flows and points of origin, the Brecon Beacons is identified as a key component of the offer of the Cardiff and Swansea City Regions, as well as a focus for the economy of Mid Wales, taking advantage of improved transport, mobile and broadband connectivity to the benefit of the industry and visitors.

In summary we would condense this vision as a set of 4 clear aspirations for Tourism in the Brecon Beacons:

- ✓ **A proud exemplar of a sustainable destination supported by its communities**
- ✓ **A ‘good neighbour’ adding significant value to the regional offer and economy**
- ✓ **Vibrant private and voluntary sectors taking a lead in tourism delivery and visitor welcome**
- ✓ **More reasons to visit more often across the National Park and across the year**

Strategic Aims and Priorities

In matching the overall Wales growth target the overall strategic intent is delivering tourism of **higher value** - economic, social, cultural and environmental - to the Brecon Beacons; improved connectivity, or in simple language, being more ‘joined up’, is the key to delivering that value - the ‘golden thread’ running through this plan...

In the way we present the Destination:

- ‘Critical mass’ awareness, adoption and promotion of the Brecon Beacons branding and brand values among visitor-facing organisations and producers
- A ‘seamless’ approach to managing the ‘visitor journey’ before, during and after a visit, especially through on-line channels
- Development of ‘soft-packaging’ through consistent communications and information linking accommodation and transport options to attractions, activities, events, food and drink and retail to ensure a broader and deeper Beacons experience for visitors (and to take full advantage of national and regional brand-building activity)

In the way we work together:

- An integrated approach to overall destination management with clear lead responsibilities, accountabilities and reporting lines

- Stronger collaboration between the Beacons and its ‘neighbours’ based initially on time-limited projects of clear mutual benefit
- A clear cross-departmental visitor economy focus within the statutory and non-statutory policies, functions and delivery activities of relevant governmental bodies especially Brecon Beacons National Park Authority

In the way look after our visitors

- A match between the destination’s objectives and the specific labour and skills required to deliver them
- A stronger but simpler partnership between tourism stakeholders to deliver the brand and quality promise of the destination whether public, private or third sector and national, regional or local in scope
- A thorough and shared understanding of visitor profile, behaviours, attitudes and needs to guide investment in the experiences we offer

Strategic Objectives and Candidate Areas for Actions

We can translate these aims into corresponding objectives for the 5 years of the strategy’s life with candidate measures of success as follows:

Objectives	Measures of Success
Presenting the Brecon Beacons	Market Development and Reputation Development
Increase the number of visitor facing businesses and organisations adopting the Brecon Beacons brand and branding in their work	<ul style="list-style-type: none"> • Quality and quantity of ‘on brand’ content generated • Industry awareness raised through guidance/case studies/ Awards/ protocols • Number of Producers under-taking co-branding initiatives • Number of co-branding ‘agreements’ with neighbouring destinations
Improve management of the ‘visitor journey’	<ul style="list-style-type: none"> • Improvements in database management (business and destination level) • Social Media protocols established • Comparative performance of Website • Improved reputation through feedback, UGC

	<p>and review systems</p> <ul style="list-style-type: none"> • Progress on implementation of Visitor Management Plan
Provide added value from each visitor through ‘soft packaging’ of broader and deeper experiences	<ul style="list-style-type: none"> • Number and take-up of ‘Day to Stay’ incentives/ initiatives • Improvements in evening/ family offer • Development of proactive information network(s) • Number of innovative transport solutions • Establishment of Autumn/ Winter events ‘seasons’ • Numbers of visitors quoting added value of cultural aspects of a Brecon Beacons visit
Working Together	Partnerships
Improve effectiveness of Destination Management	<ul style="list-style-type: none"> • Stakeholder clarity regarding destination manager role • Revised DMP structure with clearer roles and accountabilities • De-duplication and clearer allocation of specific delivery roles e.g. training, marketing
Improve working relationships with stakeholder local authority areas	<ul style="list-style-type: none"> • At least one practical project each year in partnership with neighbouring/ over-lapping destinations (product development or marketing) • Revised and valued engagement structure with neighbouring LAs/ City Regions
Enhance BB visitor-economy focus of stakeholder statutory and non-statutory bodies	<ul style="list-style-type: none"> • Identification of key organisations and engagement plan • Information on volume, value and impacts of BB Tourism circulated to wider stakeholders

	<ul style="list-style-type: none"> • Identifiable Tourism input to wider policy and service delivery planning • Tourism focus for Place-Plans • Business Support mechanisms fully acknowledging tourism
Looking after our visitors	The Brecon Beacons Welcome
Deliver a higher skilled welcome	<ul style="list-style-type: none"> • Training and development needs identified • Training providers delivering against those needs • Regular and inclusive Industry networking and learning • Self-reliant network of Ambassadors
Deliver a higher quality experience in line with the brand promise for the Brecon Beacons (and Wales)	<ul style="list-style-type: none"> • Public realm and infrastructure maintained and enhanced • Further protocols/ agreements with stakeholders to manage ‘pinch points’ • Upgraded/ new capacity in line with long-term customer demand
Better understand our visitors and key markets to provide the evidence base for action and evaluation	<ul style="list-style-type: none"> • Visitor research • Stakeholder research • Trends and horizon-scanning • Reputational analysis

2. Setting the Scene

2.1. Current Climate:

This strategy covers the period to 2022 and the Destination Action Plan accompanying it to 2020.

It builds on previous medium term tourism strategies for the destination the last of which covered the years 2011 to 2016. That piece of work contained comprehensive analysis of the destination and the wider strategic context, much of which is still highly pertinent and can be found here <http://www.beacons-npa.gov.uk/wp-content/uploads/tourism-strategy-2011.pdf> .

By common consent across the destination the need is therefore for a ‘light touch’ review of that previous work while updating contextual and performance information where these have changed significantly.

2.2. Strategic Context

It is no coincidence that our protected landscapes, especially the National Parks and Areas of Outstanding Natural Beauty, are also the destination brands of choice for so many of Wales’ visitors - the immediate appeal and recognition of for example Gower, Snowdonia, Pembrokeshire, Wye Valley and Anglesey as well as the Brecon Beacons has historically transcended that of the country overall. Brecon Beacons’ commitment to and implementation of a sustainable approach to tourism development and marketing is recognised in achievement of the Europarc European Charter for Sustainable Tourism. This strategy will form part of the evidence to be submitted for renewal of that designation in due course.

Future Generations

The national context for sustainable tourism within the Brecon Beacons is set by the Welsh Government’s Wellbeing of Future Generations Act 2015

<http://gov.wales/topics/people-and-communities/people/future-generations-act>

A prosperous Wales

An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.

A resilient Wales

A nation, which maintains and enhances a bio diverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).

A healthier Wales

A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.

A more equal Wales

A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).

A Wales of cohesive communities

Attractive, viable, safe and well-connected communities.

A Wales of vibrant culture and thriving Welsh language

A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.

A globally responsible Wales

A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

Partnership for Growth 2013-2020

The national tourism strategy led by Visit Wales and refreshed in 2016

<http://gov.wales/docs/drah/publications/161116-strategy-review-en.pdf> sets out the following priority actions, which will strengthen Wales' competitive position and capitalise on new opportunities for growth. The strategy seeks to deliver a 10%, real terms, increase in tourism income by 2020. The objectives of particular relevance to the Brecon Beacons are highlighted in **bold type** below:

Promoting the Brand

- Building Wales' profile; rolling out the series of Themed Marketing Years with **Year of Adventure in 2016, Year of Legends in 2017, Year of Sea in 2018 and Year of Discovery in 2019**, underpinned by new product experiences and events.
- Evolving the product led approach; promoting relevant holiday types, iconic products and **distinctive destination brands and experiences** to meet market needs.
- **Attracting high-growth markets**; continuing to prioritise the domestic holiday market, taking a tightly targeted approach in our priority international markets of Ireland, Germany and US and focussing on partner-led and tactical opportunities in wider international markets.
- Refocussing marketing activity; delivering an appropriate balance of marketing activities between and within each target market based around market growth potential, resource availability and **opportunities to collaborate with partners**.
- Targeting new high yield markets; securing additional resources to target the Business Events market, supporting Cruise Wales and supporting golf marketing, with a view to greater private sector engagement after the Seniors Open in 2017.
- **Becoming digital-first**; developing an integrated digital gateway for Wales, improving www.visitwales.com and Visit Wales international web sites,

developing the content ecosystem for Wales and growing social media communities.

- Driving spend and profitability; Visit Wales will continue to focus on increasing overall demand and interest in visiting by using digital and trade channels to filter interest into leads for the industry.

Product Development and Major Events

- Flagship attractions; particularly those providing distinctive and unique **experiences that can attract new demand and all weather, year round visits.**
- Quality accommodation; particularly high quality branded hotels and upgrades to **quality accommodation that meet changing market demands.**
- Business and Events; products to cater for Business and Events markets capitalising on proposed Wales International Convention Centre.
- Cruise; Develop modern cruise infrastructure at key ports.
- Development of **Heritage and Cultural experiences**; investment in the visitor experience and accommodation provision at landmark heritage sites.
- Food and Drink; strengthen Wales' growing reputation as a **food destination** including progressing priorities set out in the Food Tourism Action Plan.
- Utilisation of emerging technology; industry to harness new technology to create exciting, transformative visitor experiences.
- Attracting new high profile events and developing existing events; drawing high spending visits from outside Wales.
- Supporting the Thematic Years with anchor events.
- Maximising branding opportunities at events.

People Development

- Continue to **influence training and apprenticeships** schemes to remain in step with changing industry and customer needs.
- Drive business use of the Welsh Government Skills Gateway Business Online Support Service.
- Support destinations to achieve **World Host Destination status.**

- Introduce a National Tourism Award for excellence in customer service in 2017/18.
- Investigate development of a customer service element in the Welsh Baccalaureate.
- Progress the Learning Journeys project to develop best practise across the industry.
- Support initiatives aimed at changing perceptions of careers in tourism.
- Increase provision of guides and local ambassadors with suitable language skills.
- Work with the industry to consider opportunities for a new hospitality school in Wales.

Place Building and Partnerships

- **Refocus support for the Destination Partnerships** to drive forward key actions in line with their plans and wider strategic priorities.
- Identify destinations with market strength to be promoted as lead sub-national destination place brands.
- Review the role and support for Tourism Associations.
- Deliver the EU funded strategic tourism infrastructure investments at the eleven specified destinations across Wales.
- Strengthen the links between the Regional Fora, Destination Management Partnerships, local tourist associations and Sector Representative Industry Bodies.
- Ensure that tourism is prioritised in the plans of the Regional Economic bodies.
- Promote the new online support for the industry and develop a sustainable approach and distinctive sense of place.
- **Provide better evidence to key decision makers** at a local level to ensure budgets are protected to reflect the impacts of the visitor economy.
- Ensure that **tourism needs are considered in relevant transport infrastructure** developments including better connectivity via the main air and sea ports of entry, improvements to the M4, rail electrification and franchise agreements.
- **Work with transport operators** and carriers on route promotion to visitors.

VW has crystallised its criteria for future project support into the following 5 Brand 'tests':

- ✓ **Surprise and Inspire**
- ✓ **Change Perceptions**
- ✓ **Elevate Our Status**
- ✓ **Do Good Things**
- ✓ **Be Unmistakably Wales**

At a destination level the key changes to the strategic context are:

National Park Management Plan

The Brecon Beacons National Park Management Plan 2015 - 2025,

<http://www.beacons-npa.gov.uk/the-authority/who-we-are/npmp/> which is the guiding statutory document for the work of the National Park Authority, says the following about tourism:

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

BBNPA Visitor Management Plan

The Brecon Beacons National Park Authority Visitor Management Plan 2015

<https://www.beacons-npa.gov.uk/wp-content/uploads/oldsite/the->

[authority/working-in-partnership/tourism-new/BBVMP_FINAL_300913.pdf](#) seeks a more proactive approach to managing visitor impacts in the destination:

Theme One: Site-based Interventions

Local interventions are needed to better manage the impacts and experience of visitors at specific sites, distinguishing between:

- Honeypot sites which have the capacity to provide high quality experiences for large numbers of visitors where impacts can be managed within acceptable limits; and
- Environmentally pressured sites and routes where visitor activities are currently producing unacceptable impacts (often in combination with other causes) and where management interventions are needed to reduce or mitigate these impacts.

.... there are opportunities to work with businesses and communities in remote areas to improve visitor experiences and facilities in villages, such as toilets and places to buy food and drink during the day.

Theme Two: Communication and Influence

A focus on marketing and promotion of outdoor recreation activities is needed to ensure that consistent messages are used to provide visitors with high quality experiences that support the conservation of the National Park. The new **Brecon Beacons brand** will be an essential part of this. Key interpretation messages should be developed for each of the most popular ‘honeypot’ locations, based on their particular special qualities and conservation needs.

Further engagement should take place through the South Wales Outdoor Activities Providers Group with organisers of young people’s activities in the upland areas. More generally, there are opportunities to promote, and make locally relevant, the existing national codes of conduct through **training of tourism businesses and recreation providers**, leaflets, links on webpages and signage at key sites. There are significant opportunities to extend, in a more co-ordinated fashion, existing volunteering

programmes. Work should continue to increase visitors' input to the local economy, particularly through an enhanced visitor-gifting scheme.

Theme Three: Institutional Arrangements

Most of the actions will only be achieved on a **multi-agency basis, requiring a focus on how organisations work together** and how projects are planned and delivered. Strategic leadership will be needed to ensure co-ordinated delivery of this Plan. A decision is needed on how this advocacy role will be implemented in the context of the current Review of the National Park Management Plan, recognising that it should be a shared endeavour between conservation, tourism and community interests. Finally, there is a need for **improved evidence on visitors and their impacts** to guide more effective management. Better information on the origins and activities of day visitors and on the numbers of people using the most popular outdoor routes and sites will provide context to guide management.

Fforest Fawr Geopark Plan <http://www.fforestfawrgeopark.org.uk/>

Beyond the National Park's own protected area designation the international Geopark designation has proved a positive way of building awareness, community pride and visits to the western half of the Brecon Beacons. The Objectives for the Geopark, recently awarded a further 'green card' for its management and outcomes are as follows:

Through efficient and effective partnership working with a wide range of local and regional stakeholders and through full engagement with the European & Global Geoparks Networks, Fforest Fawr Geopark will:

- Monitor impacts of the Geopark in order to inform future actions Drive landscape-scale conservation of geo diversity, biodiversity and cultural heritage. Enthuse local communities and their businesses to work together sustainably and feel pride in the Geopark.
- Promote sustainable economic development, especially **sustainable tourism**.
- Develop high quality information and interpretation that supports **an enjoyable visitor experience** and connects people to the Geopark.

- Act as a focus for environmental/earth sciences research.
- Undertake high quality environmental education for all ages.
- Seek to include all sectors of society in developing its work
- Use its heritage to encourage visitors, businesses and communities to address climate change.

Blaenavon World Heritage Site Management plan

Part of the Blaenavon WHS lies within the national park. The WHS Management Plan <http://www.visitblaenavon.co.uk/en/WorldHeritageSite/LookingAfterBlaenavon/Documents.aspx> is currently being updated. Early indications are that a closer and mutually beneficial tourism relationship with the Brecon Beacons is a key objective:

Re-focus the message on natural environment and outdoor activities (large walking market plus many specialist activity niches) with added value of industrial heritage.

- Capitalise on brands of BBNP and canal (a gateway to the NP)
- Event-led marketing
- Cooperative marketing with BBNPA, Valleys etc. (SM, packages)

Re-focus the product

- Rationalise and improve walking and cycling trails
- Create walking hub (info on access to activities, focus for walks, maps/models, retail etc.)
- Town centre improvements (museum, guided walks, Ambassadors, environmental improvements, THI etc.)
- Enhanced interpretation of natural and industrial heritage
- Improvements to, and better collaboration between, existing individual attractions (Big Pit, Ironworks, Heritage train, Museum)
- Support for new accommodation

Unitary Authority Tourism Plans

Each of the unitary authority areas which share part of its footprint with the Brecon Beacons National Park has a destination plan (other than Powys which defers to **this** strategy in respect of the major portion of the park within its borders).

- Monmouthshire's plan, currently under review, fully acknowledges the opportunities offered by association with the Brecon Beacons destination.
- Merthyr Tydfil identifies a role as an access and service point for the Brecon Beacons
- Blaenau Gwent looks to exploit markets staying within the Brecon Beacons
- Torfaen's recently updated plan references the shared interest in the Blaenavon World Heritage Site and the Monmouth and Brecon Canal.
- Similarly Neath Port Talbot acknowledges the Waterfalls area visitor management 'pinch point'.
- Herefordshire identifies the Black Mountains in passing as a key upland area.
- Carmarthenshire, Rhondda Cynon Taff and Caerphilly make no specific reference to the Brecon Beacons with their plans looking instead west or south for partnerships and lines of supply.

Underlined by the inclusive nature of Brecon Beacons Tourism membership this relative strategic and organisational indifference is in stark contrast to the internal industry and Brecon Beacons Destination Partnership's view of the 'Greater Beacons' area of influence (and membership) that extends 10 miles in all directions from the official National Park boundaries. We would therefore encourage all those with a stake in the success of tourism in the Brecon Beacons to reflect relevant parts of this strategy, in their own development and marketing plans. To do otherwise is arguably to ignore a significant product premium.

2.3. Consultation Results including Survey Summary

The following consultations have informed this study:

- One -to-one consultations with a number of key stakeholders in the private and public sector

- Workshop as part of a BBT members' meeting
- 2 meetings of the SDPB
- Workshop with BBNPA staff and members
- Presentation and discussion with Countryside Managers Team BBNPA
- Presentation and discussion with SDP Forum
- Online survey with 100 industry stakeholders responding
- Results of Brecon Beacons Visitor Survey 2016

The survey summary is attached as an Appendix to this Strategy

Challenges Arising

From the strong views of consultees we have captured a number of key specific challenges for the Brecon Beacons destination:

- The extent and quality of the Family Offer especially under-cover alternatives
- Broadening the appeal beyond adventure activities especially culture, heritage, food and drink, events, market towns and villages
- Addressing seasonality - not only times of the year but also days of the week
- In an increasingly 'post-TIC' world ensuring the effectiveness of a more dispersed Visitor Information system using multiple outlets and the Ambassador network
- Closer relationship with retail and encouragement for visitor-friendly opening hours and offer
- What Public Transport is available is not necessarily geared up to support tourism through its route network, time-table or fare mechanisms
- The shared destination website is the key communication mechanism between the destination and the visitor but is still performing sub-optimally

These specific concerns can be encompassed by one overarching challenge -

'Joining Up' the destination and the way it works:

- ❖ The overall 'customer journey',
- ❖ 'Soft packaging' of access, things to do, hospitality, transport and accommodation,

- ❖ Buy-in to the Brecon Beacons brand and
- ❖ Streamlining the delivery partnership

2.4. Achievements

Progress on projects across the board has resulted in a range of significant achievements, from development to marketing.

The strengthening of the Brecon Beacons Sustainable Destination Partnership (BBDP) that continues to expand on opportunities for partnership working and the development and co-ordination of joint work programmes.

Establishing Rural Alliances (12 in total) businesses and communities working together to bring an economic boost and counter demographic change including Hay, Abergavenny, Crickhowell, Talybont, Talgarth, Monmouth and Brecon Canal, in Brecon, (the successful Brecon Arts Month), Crai, Cwm Tawe (Adelina Patti), Llandovery Sheep Festival and Walkers Are Welcome and Cwmtwrch.

Capacity building and the consolidation of Brecon Beacons Tourism (BBT) that has seen, over the last 10 years, BBT growing an approximately 300-strong membership and maturing to the point that the Association is acknowledged as a vital delivery partner within the destination and an invaluable support and communications body for the local tourism industry. The 'step change' was the appointment of a paid executive, now supplemented by communications support. In 2016 the first Tourism Awards ceremony took place drawing both a large number of entries and high attendance on the evening.

The Ambassador Scheme in the area now embraces over 150 people and initiatives such as **Business Improvement Days** are well received and attended. Once again, the working partnership between BBNPA and BBT ensures that such opportunities are communicated and taken up by the wider sector.

In 2013 the area was awarded the **UK's Greenest Tourism Destination** at the 1st Green Tourism Conference - recognition of the successful adoption and roll out of the **Green Tourism Accreditation Scheme**.

In 2015 a **Visitor Management Plan** was endorsed and has helped to guide information, interpretation and management across the Park. It helps to promote responsible tourism with visits (from both tourists and residents) that go hand in hand with respect for the conservation of the area's natural beauty and the needs of local communities and businesses.

Marketing activity, in line with visitor expectation and in order to take advantage of opportunities as they have arisen, has continued to refocus and develop in recent years. Partnership activity (public, private and third sector collaboration) has allowed inroads to be made across different markets as well as boosting resources via successful applications for financial support (e.g. Visit Wales) in order to take forward shared activity. Public Relations and promotional activity in general has all been enhanced by the close working partnership and time and financial efficiencies achieved. Creating the destination website combining rich content from BBNPA and BBT has been a significant step forward but sub-optimal performance will soon undermine industry confidence.¹

Dark Sky status was awarded in February 2013 and meant that the Brecon Beacons National Park was officially designated the fifth International Dark Sky Reserve in the world - the first in Wales. The campaign was led by the Brecon Beacons Park Society and the National Park Authority and has gone on to create not only promotional opportunities to encourage visitors but has also impacted on Ambassador training and the way in which many businesses market their offer, particularly in shoulder season periods.

Dark Sky status, together with the area's many other attributes (and the successful development and promotion of those attributes) continues to draw **recognition in**

¹ More detail on this issue has been submitted as a separate discussion paper

national and international press most recently in respected travel guide “Lonely Planet” that names the Park in its Top 7 National Parks in Europe (alongside entries for Norway, Iceland, Greece, Italy, Scotland and Spain) and states *‘This dark sky reserve is home to the moody Black Mountains and magical Coed y Rhaeadr (Wood of the Water) where cascades include Sgwd yr Eira (the Snow Waterfall) on the River Hepste, with a path leading right behind the curtain of water’*

Continued **Product development** such as the 2016 launch of a new pan Beacons touring route (running from Llandeilo in the west to Abergavenny in the east) has helped to ensure that there are additional reasons (and target markets) in the context of attracting visitors.

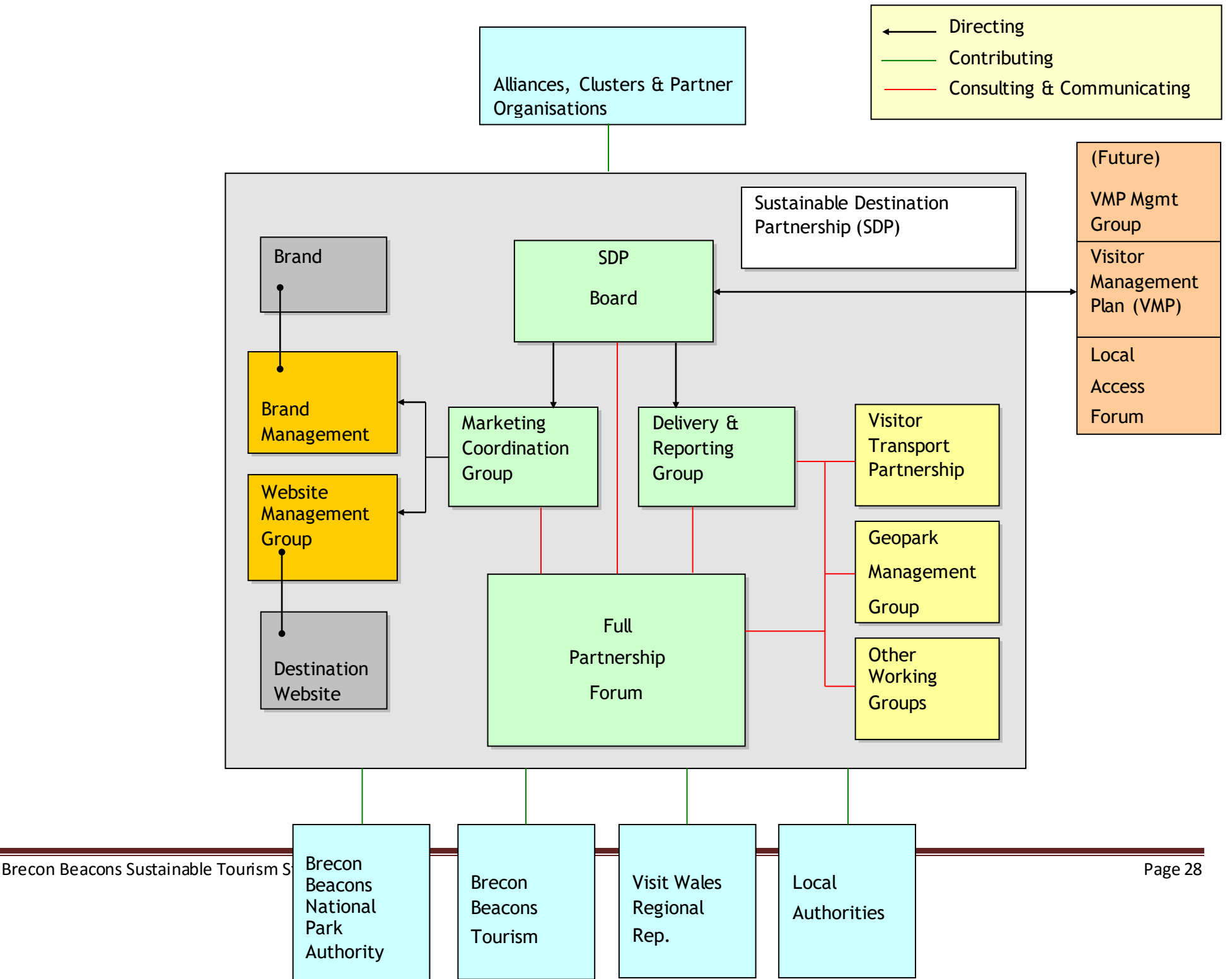
New branding for visitor facing work and communications evolved and was received well by the sector. The brand themes and values are split into Audiences (Cosmopolitans, Traditionals, Discoverers and Functionals) and now provide a foundation for roll out of a coherent, usable and consistent brand for the Park area.

2.5. Partnership and Working Arrangements

Brecon Beacons Sustainable Destination Partnership (BBDP)

Rightly, the Destination Management model and levels of cooperation between partners achieved in the Brecon Beacons are highly regarded in a Wales context. What is more they are clearly producing positive results. However, partnership working is never easy or straight-forward and requires perseverance, confidence, shared clarity of purpose, willingness to compromise and effective communication in equal measure to succeed. As has been amply demonstrated in the Brecon Beacons, destination partnerships really come into their own where no one stakeholder has exclusive access to all the lines of support, resources, and information needed. What the Brecon Beacons has lacked in substantive core funding (in absolute terms and in historical comparison with other destinations) has been more than made up for through adopting and trusting the partnership approach.

Following recommendations in the previous strategy the current governance and delivery structure was developed and fully implemented in 2014 with the illustrative schematic shown below:



By any standards of organisational design this is a complex structure but for sound reasons as it sought to:

- ❖ Ensure all relevant stakeholders are included and have a level of input commensurate with their degree of interest and influence (especially the private sector)
- ❖ Embrace *realpolitik*, historical sensitivities and organisational ‘fault lines’
- ❖ Address a previously even more disparate structure where reporting lines were unclear
- ❖ Separate strategic, operational, oversight and information roles
- ❖ Provide for accountability and ‘checks and balances’
- ❖ Be fully compliant with Visit Wales’ guidance on Destination Partnerships

The structure was implemented through the following ‘set piece’ calendar of meetings in any single year:

- 1 x Annual Conference (open to all with an interest in tourism in the Destination but not included in the formal structure)
- 2 x Meetings of the Sustainable Destination Partnership Forum
- 4 x Meetings of the Sustainable Destination Partnership Board
- Sequential meetings of the Marketing Coordination Group and Delivery and Reporting Group to respond to the Board meeting cycle
- Other groups meeting as and when required

Both the Board and the Marketing Coordination Group have had independent Chairs appointed, external to any of the constituent organisations, to provide objectivity. The Board Chair has also chaired the Conference and meetings of the Forum.

The annual Conference is organised jointly by BBNPA and Brecon Beacons Tourism. BBNPA hosts, facilitates and provides secretariat for the other Partnership meetings.

Arguably these are still relatively early days with the structure operating in this form for just over 2 years. It is possible however to venture some observations based on experience to date:

- Working relationships across the structure have improved markedly but with a clear route through to resolve difficult issues when they do arise²
- There is significant duplication of representation and, arguably, function between elements of the structure - the 2 delivery components (MCG and DRP) in particular share many of the same 'faces'
- Some on the original list of stakeholders and groups are no longer operating e.g. Regional Tourism Partnerships and Churches Tourism Network Wales, while others e.g. Theatr Brycheiniog, are demonstrably getting much more involved in the visitor economy so a 'refresh' of contacts may be required

The Forum has been the least successful of the components in terms of:

- Numbers and/or continuity of attendance - especially from LA 'neighbours'
- The subsequent over-representation of BBNPA at the meetings
- The breadth of internal and external interests to be represented (strategic national bodies through to local 'hands-on' clusters represented by volunteers)
- A reluctance to grasp the roles of holding the Board to account or influencing strategic direction

As a consequence it is hard to set a compelling and engaging agenda for Forum meetings and it is instructive that so many serving on the Forum are happy to be 'corresponding members' only.

By contrast the Conference has been extremely successful, drawing influential speakers, setting a clear agenda for the year ahead, engaging a diverse range of stakeholders in product development and celebrating achievement. The introduction of a modest attendance fee in 2017 to cover refreshments had no

² A prime example in this regard is the Destination Partnership's pragmatic and supportive response to BBNPA's funding difficulties at the National Park Centre

detrimental impact on the numbers attending and arguably led to greater value being put on the event.

Despite the complexity it is encouraging that the majority of businesses within the destination feel engaged with the system and understand how it works on their behalf.

The 2 most engaged partners in the SDP in terms of project delivery are BBT and BBNPA. As the former matures and increases its capacity it feels ready to take on additional lead activity on behalf of the destination especially around the destination website, PR and business development activities. This has, perhaps inevitably, led to some tensions in areas where BBNPA has traditionally taken a lead role and this work gives an opportunity to clarify responsibilities. BBT is now fulfilling an important communication and 'pastoral' role with the community cluster groups (along with individual tourism stakeholders on-territory) who are all invited to its meetings.

It is somewhat anomalous that the Chair of the SDPB is remunerated but the Chair of the MCG is not (arguably the latter has had the tougher job over the past 2 years...).

Currently membership of the BBSDP Board and Forum is necessarily based on organisational representation rather than individual experience or skills.

Wider Partnerships

Because of its cross-border coverage the BBSDP is invited to attend 3 of the 4 Regional Tourism Fora in Wales (South East, South West and Mid), currently the second tier of industry engagement instituted by Visit Wales (VW) in 2014. This distinction however places significant strain on the time of officers and volunteers if all meeting opportunities are to be taken up. Both Brecon Beacons representatives and VW would agree that the Regional Fora are not yet fulfilling their communication and strategic oversight expectations.

Through mutual representation BBSDP is well integrated into other tourism and wider economic regeneration activities in Mid Wales and BBNPA has a place on the Carmarthenshire Destination Partnership and the Blaenavon WHS Management Board. At present, however, there is no formal representation on the LA-led Destination Manager groupings in South East Wales perhaps echoing the lack of reference to the Beacons in many of the South East Destination Plans. There is no formal engagement with the Swansea City Region or the Cardiff Capital Region processes at strategic or working group level. Both are now in receipt of 'City Deals' which will potentially unlock significant additional resources for the visitor economy.

3. Where we are

3.1. Demand Factors and Competitive Position

Surveys in recent years indicate that those who do visit are very aware of the Brecon Beacons National Park as an entity with 97% of the 1500 plus questioned in 2016 stating that they were aware of the National Park prior to arrival and 57% citing wanting “to visit the National Park in particular” as a key factor in influencing their decision to take the trip.

Although showing healthy growth overall year on year, the vast majority of the area’s 4.1 million annual visitors are visiting for the day, although staying visitor numbers have experienced a boost in recent years.

Visitor Type	2014 - Number	2015 - Number	% Change
Staying	0.296 million	0.331 million	+ 11.5%
Day	3.718 million	3.815 million	+ 2.6%
Economic Impact (£m)	221.56	238.93	+ 7.8%
Total Employment	3546	3823	+7.8%

This is a reflection of ease of access from nearby urban areas in Wales and England, compared to the other National Parks in Wales (e.g. Pembrokeshire, which records over 50% of its 4.3 million annual visitors as staying). Priority must be given to finding ways to maximise secondary spend revenue whilst those day visitors are in the area as well as looking for ways to convince them to remain in the Park overnight.

The area has benefitted from positive press and media coverage in recent years, a result of a concerted, partnership effort to present the destination in mainstream media and elevated by aspects such as achieving Dark Sky status. That status, coupled with access to a large drive time population puts the destination in a

strong position to drive overnight stays, in the next 12 to 24 months, using Dark Sky status as a hook.

When considering the existing strategy and its stated key external influencing factors many of these have become more prominent in recent years (in terms of how they may impact on the area’s appeal).

The following table highlights notable aspects of the above.

<p>The rise in experience based holidays and local distinctiveness</p>	<p>Including unique offers but with the accent on the basics of a local experience (e.g. food) this trend shows no sign of slowing down. Development of ‘soft-packaging’ (aka “bundling”) through consistent communications and information linking accommodation and transport options to attractions, activities, events, food and drink and retail to ensure a broader and deeper Beacons experience for visitors (and to take full advantage of national and regional brand-building activity).</p>
<p>Continued growth in the UK short break market</p>	<p>Further fuelled by exchange rate uncertainty and safety considerations, research on holiday intentions (BDRC, January 2017) shows that Britons are more likely to take a short-break of 1-3 nights (88%) than a longer holiday of 4+ nights (77%). It is a clear indication that the area can and should shape communications and activities around short-breaks.</p> <p>The following 12-24 months represent one of the best chances (in recent years) for the area to convince and convert some of its day visitor contingent into staying overnight.</p>
<p>Dominance of the digital medium in the holiday search and booking process</p>	<p>Although the need to ‘escape and switch-off’ while taking a rural break is apparently a key motivation for 2 in 5 British holiday-makers (BDRC, 2017) the holiday planning process is predominantly built around the</p>

	<p>digital medium.</p> <p>Google’s recognised 5 stages of travel planning are equally applicable to all market segments and based around travel search patterns online. From Dreaming to Planning, Booking to Experiencing and finally Sharing. The area needs to ensure that digital resources and activity planning offer a ‘seamless’ approach to managing the ‘visitor journey’ before, during and after a visit.</p> <p>NB: Approximately 26% of the 1500 visitors surveyed in 2016 had used internet and social media to research their trip. A low figure that can, in part be explained by the high incidence of those who were repeat visitors and familiar with the area (73%).</p>
<p>The weighting given (by the prospective visitor) to positive peer to peer recommendations and reviews when choosing a destination</p>	<p>Further to the above, recent research (BDRC, 2017) confirms that over 2 in 5 Britons use review sites for their holidays (rising to two-thirds of 18-34 year olds and 3 in 5 families).</p> <p>As recorded by Nielsen “92% of consumers trust online content from friends & family above all other forms of brand messaging”. Perhaps even more significantly, that same research shows that online reviews play such a strong part in the decision making process that“ (consumers)...<i>trust strangers second most - far more than they trust content from brands.</i>”</p> <p>Overall, over 50% state that they were influenced to take their last holiday by a recommendation. The Brecon Beacons, with its high levels of visitor satisfaction and repeat visit patterns (e.g.75% of those interviewed in the 2016 survey of over 1000 people had visited previously and 92% said that they would be returning to visit again in the future) should be well placed to take advantage of this.</p>

<p>‘Homestay’ accommodation e.g. Airbnb is set to increase in 2017</p>	<p>Barely on the radar at the time of the last strategy (as although founded in 2008 the site was still niche)</p> <p>Airbnb has become a major force in the Online travel Agency (OTA) and social media community. Now offering experience booking as well as accommodation reservations.</p> <p>As at February 2017, the site offers approximately 90 accommodation options in the wider Brecon area, 80 in the Abergavenny area, 60 in Crickhowell, 50 in the Llandeilo area and over 100 in the wider Hay on Wye area. Although there is overlap with known bedstock, many of these properties are “off the grid” in terms of influence and scope of the Park’s marketing activities (including brand roll out and skill development opportunities).</p> <p>This is a position shared with virtually every recognized destination in the UK (as well as further afield) and is important to note as the rise in homestay will undoubtedly impact on the overnight stay capacity and pattern with the area, albeit that it will be extremely difficult if not impossible to effectively monitor that impact.</p>
---	---

3.2. Supply Factors

Accommodation

According to official figures the accommodation stock within the Brecon Beacons has lost around 0.6% of capacity over the past 5 years with just under 10k bedspaces recorded in 2016³. The analysis is attached as an Appendix. Please note however the comments regarding Airbnb in the previous section, which suggest

³ There have however been changes in how non-serviced accommodation is categorised

significant numbers operating ‘under the radar’. The industry survey results would also suggest a turnover of operators given the numbers who have been in business for 5 years or less.

Attractions

A schedule of attractions in the ‘Greater Beacons’ area is included as an Appendix. Where visitor numbers are published they have been included, but any site attracting over 100k visits a year can be regarded as a major attraction in Brecon Beacons terms. While there are a number of independent commercial operations many of Wales’ big multiple ‘brands’ can be found in and around the destination: National Museum Wales (Big Pit is BBNP’s most popular attraction), Cadw, National Trust, Natural Resources Wales, Canal and River Trust and of course BBNPA itself.

Activities

The opportunity to take part in formal and informal activities has long been a main motivator of visits to the Brecon Beacons.

The South Wales Outdoor Activity Providers Group (SWOAPG) has around 230 members based in Wales and beyond but the vast majority of them are providing adventure activities at various locations within the Brecon Beacons on a regular basis. 60% of members are signed up to the Environmental Charter. It is instructive that SWOAPG came into being, supported through BBT, in response to sustainability and impact concerns at key ‘honeypots’.

3.3. Dimensional Analysis for the Brecon Beacons Destination

Available research and extensive consultations with stakeholders lead to the following summary analysis of the current status:

Dimension	Analysis
Political	<ul style="list-style-type: none"> • Welsh Government policy recognises Tourism as one of Wales’ key economic sectors • Significant work with individual communities within the Park has embedded a pro-tourism stance at grass roots • There has been stakeholder buy-in to the existing tourism strategy and its ‘direction of travel’ • Positive and supportive view of tourism by the Brecon Beacons National Park Authority and Unitary Authorities with a foothold in the Park but... • Limited acknowledgement of the value of association with the Brecon Beacons by UAs to the South and West • Brecon Beacons offer not acknowledged by Cardiff Capital or Swansea City Region policy priorities • Impacts of Brexit are unclear in terms of perceptions of UK for welcome and employment
Economic	<ul style="list-style-type: none"> • More positive performance of the destination in 2015 after some years of reported ‘flat lining’ • Vibrant tourism sector with evidence of new entrants within the Brecon Beacons • Rise in available accommodation (in addition to current known stock) via Airbnb - this has increased capacity although there is uncertainty over total base and levels of quality. While some known accommodation providers use it to supplement marketing reach other properties (previously unknown) have appeared • Iconic events of national and international appeal e.g. Hay Literary Festival, Green Man Festival, Abergavenny Food Festival • The Brecon Beacons is one of the UK’s iconic destination brands but...

	<ul style="list-style-type: none"> • Take up of the Brecon Beacons brand has been limited • Long-term dependence on public funding to support tourism marketing and product development • Public funding at destination level continuing to reduce • Reducing access to EU Funds with prospect of no availability after 2020 - effect exacerbated by previous significant successes • Increased dependence on Welsh Government central funds to support day-to-day delivery • Significant 'lag' for private and voluntary sectors in filling funding gaps • Effects of Brexit unclear although fall in value of the pound has had short term positive impact on Overseas and UK visits to Wales
Social	<ul style="list-style-type: none"> • An aging but still adventurous UK and Northern European population • Local residents have positive view of tourism and its benefits • Tourism demonstrably supports higher level of retail, eating out and cultural provision for local population • High levels of expertise through volunteering e.g. CRiC • Tourism is significant provider of locally based employment but... • Still some concerns over value/ prospects of tourism jobs due to perceptions over seasonality, structure of employment and wage rates • Potential difficulties in recruiting to key posts after Brexit • Retirements and lifestyle changes are leading to the largely 'invisible' loss of capacity, expertise and 'sense of place'
Technological	<ul style="list-style-type: none"> • Increasing use of digital to research, plan, purchase and review visits, as well as accessing real-time information in

	<p>destination</p> <ul style="list-style-type: none"> • An integrated destination website has been established combining rich content from the industry and BBNPA • Rapidly improving technologies for less polluting forms of personal transport but... • The destination website and online presence are performing sub-optimally and impacting on industry confidence • Access to fast mobile/ Wi-Fi/ broadband now seen as a basic service not optional • A large proportion of visitors still prefer and value hard copy information on territory • Platforms such as Airbnb are disrupting traditional mechanisms for product development, distribution and collaborative working • Limited locations within the destinations for charging electric vehicles
Environmental	<ul style="list-style-type: none"> • National Park and other relevant designations (Geopark, Dark Sky Reserve etc.) means that high environmental sustainability standards are a 'given' for any public-supported economic activity • National Park status is a huge advantage in visitor appeal • City Region Metro proposals may offer improved sustainable transport opportunities from South and East • Tourism provides locally based employment opportunities thus limiting out-commuting but... • Business-level green accreditation has had limited take-up due to perceived cost v benefit • Current Public Transport is limited and geared towards social rather than economic goals - attempts to supplement provision have been expensive and time-limited

<p>Organisational/ Legal</p>	<ul style="list-style-type: none"> • Brecon Beacons has officially recognised and endorsed destination status with ‘big hitters’ round the Destination Partnership table • In Brecon Beacons Tourism the destination enjoys an increasingly professional industry association much admired in its scale scope, track record and ambition by many other areas of Wales • BBNPA has introduced ‘whole place plans’ for BB Communities with tourism prominent in many of them • Following the ‘Marsden Review’ NPAs in Wales have had their purposes and roles endorsed and strengthened but... • As in other Local Authorities, all departments of the National Park Authority have a significant role to play in helping the destination ‘work’ to the benefit of visitors and residents - not just those with tourism in the title • The commitment to partnership and commendable instinct for inclusion has led to a highly complex communications and governance structure • It has not been clear where day-to-day responsibility for managing the Brecon Beacons destination lies although a management restructure is underway within BBNPA that should deliver a clearer allocation of lead tourism responsibilities • BBNPA has undertaken a review of the partnerships with which it is formally involved. This may have impact on the future ‘rules of engagement’
----------------------------------	---

4. Where we want to go

4.1. Ambition

The principles underpinning the new strategy

To the guiding principles established in the previous strategy and against which proposed actions are tested i.e.

- ✓ **Effective Partnership**
- ✓ **Year Round Growth in Value**
- ✓ **Social Inclusion**
- ✓ **Sustainability**
- ✓ **Geographical Spread**
- ✓ **Integrated Brand**
- ✓ **Balanced Market Approach**
- ✓ **Community Engagement...**

...we recommend adding one more, implicit in Brand and Sustainability, but important in its own right:

- ✓ **Authenticity and 'Sense of Place'**

Based on historic achievements and the aspirations expressed through the consultation process we offer (overleaf) the following Vision Statement of the progress the Destination will have made by 2022.

4.2. Vision Statement - 'In 2022...

...Among Britain's protected landscapes, the Brecon Beacons continues to enhance its status as a leading sustainable destination through the way it develops and markets its tourism offer. It is good to see the private and voluntary sectors taking an increasingly prominent and active role in the partnership that manages the

destination and the assets within it. Even better is the enhanced reputation the destination now enjoys for a unique welcome to visitors and improving the well-being of residents while being a 'good neighbour' to surrounding destinations and the many local authority areas with which it shares its footprint. All now appreciate the benefits and added value of the Brecon Beacons experience.

There is a real understanding of what makes and keeps our landscape special shared by those who manage it and those who promote access to it. Outdoor and adventure activities remain a key component of the visitor offer but are now attracting a wider range of ages, aspirations, backgrounds and abilities. These activities are now complemented by a richer story: a confident celebration of the area's living cultural inheritance - heritage and arts, people and personalities, communities and language, market towns and villages, food and produce - brought to life by a self-sustaining network of tourism ambassadors.

More of our visitors are staying overnight, visiting midweek and in quieter months and discovering parts of the destination away from the 'honeypots'. They are drawn by Dark Sky, Geopark and World Heritage Site status, a competitive range of well-promoted 'four-season' experiences and a dependable calendar of festivals and events - all adding to the unique 'Sense of Place'.

Consistent with visitor flows and points of origin, the Brecon Beacons is identified as a key component of the offer of the Cardiff and Swansea City Regions, as well as a focus for the economy of Mid Wales, taking advantage of improved transport, mobile and broadband connectivity to the benefit of the industry and visitors.

In summary we would condense this vision as a set of 4 clear aspirations for Tourism in the Brecon Beacons:

- ✓ A proud exemplar of a sustainable destination supported by its communities
- ✓ A 'good neighbour' adding significant value to the regional offer and economy

- ✓ Vibrant private and voluntary sectors taking a lead in tourism delivery and visitor welcome
- ✓ More reasons to visit more often across the National Park and across the year

Strategic Aims and Priorities

As well as matching Visit Wales' overall target for growth the overall strategic intent is delivering tourism of **higher value** - economic, social, cultural and environmental - to the Brecon Beacons; improved connectivity, or in simple language, being more 'joined up', is the key to delivering that value - the 'golden thread' running through this plan...

In the way we present the Destination:

- ✓ 'Critical mass' awareness, adoption and promotion of the Brecon Beacons branding and brand values among visitor-facing organisations and producers
- ✓ A 'seamless' approach to managing the 'visitor journey' before, during and after a visit, especially through on-line channels
- ✓ Development of 'soft-packaging' through consistent communications and information linking accommodation and transport options to attractions, activities, events, food and drink and retail to ensure a broader and deeper Beacons experience for visitors (and to take full advantage of national and regional brand-building activity)

In the way we work together:

- ✓ An integrated approach to overall destination management with clear lead responsibilities, accountabilities and reporting lines
- ✓ Stronger collaboration between the Beacons and its 'neighbours' based initially on time-limited projects of clear mutual benefit
- ✓ A clear cross-departmental visitor economy focus within the statutory and non-statutory policies, functions and delivery activities of relevant governmental bodies especially Brecon Beacons National Park Authority

In the way look after our visitors

- ✓ A match between the destination’s objectives and the specific labour and skills required to deliver them
- ✓ A stronger but simpler partnership between tourism stakeholders to deliver the brand and quality promise of the destination whether public, private or third sector and national, regional or local in scope
- ✓ A thorough and shared understanding of visitor profile, behaviours, attitudes and needs to guide investment in the experiences we offer

Strategic Objectives and Candidate Areas for Actions

We can translate these aims into corresponding objectives for the 5 years of the strategy’s life with candidate measures of success as follows:

Objectives	Measures of Success
Presenting the Brecon Beacons	Market Development and Reputation Development
Increase the number of visitor facing businesses and organisations adopting the Brecon Beacons brand and branding in their work	<ul style="list-style-type: none"> • Quality and quantity of ‘on brand’ content generated • Industry awareness raised through guidance/case studies/ Awards/ protocols • Number of Producers under-taking co-branding initiatives • Number of co-branding ‘agreements’ with neighbouring destinations
Improve management of the ‘visitor journey’	<ul style="list-style-type: none"> • Improvements in database management (business and destination level) • Social Media protocols established • Comparative performance of Website • Improved reputation through feedback, UGC and review systems • Progress on implementation of Visitor

	Management Plan
Provide added value from each visitor through 'soft packaging' of broader and deeper experiences	<ul style="list-style-type: none"> • Number and take-up of 'Day to Stay' incentives/ initiatives • Improvements in evening/ family offer • Development of proactive information network(s) • Number of innovative transport solutions • Establishment of Autumn/ Winter events 'seasons' • Numbers of visitors quoting added value of cultural aspects of a Brecon Beacons visit
Working Together	Partnerships
Improve effectiveness of Destination Management	<ul style="list-style-type: none"> • Stakeholder clarity regarding the destination manager role • Revised DMP structure with clearer roles and accountabilities • De-duplication and clearer allocation of specific delivery roles e.g. training, marketing
Improve working relationships with stakeholder local authority areas	<ul style="list-style-type: none"> • At least one practical project each year in partnership with neighbouring/ overlapping destinations (product development or marketing) • Revised and valued engagement structure with neighbouring LAs/ City Regions
Enhance BB visitor-economy focus of stakeholder statutory and non-statutory bodies	<ul style="list-style-type: none"> • Identification of key organisations and engagement plan • Information on volume, value and impacts of BB Tourism circulated to

	<p>wider stakeholders</p> <ul style="list-style-type: none"> • Identifiable Tourism input to wider policy and service delivery planning • Tourism focus for Place-Plans • Business Support mechanisms fully acknowledging tourism
Looking after our visitors	The Brecon Beacons Welcome
Deliver a higher skilled welcome	<ul style="list-style-type: none"> • Training and development needs identified • Training providers delivering against those needs • Regular and inclusive Industry networking and learning • Self-reliant network of Ambassadors
Deliver a higher quality experience in line with the brand promise for the Brecon Beacons (and Wales)	<ul style="list-style-type: none"> • Public realm and infrastructure maintained and enhanced • Further protocols/ agreements with stakeholders to manage ‘pinch points’ • Upgraded/ new capacity in line with long-term customer demand
Better understand our visitors and key markets to provide the evidence base for action and evaluation	<ul style="list-style-type: none"> • Visitor research • Stakeholder research • Trends and horizon-scanning • Reputational analysis

4.3. Destination development

Like other destinations across Wales, it would be easy for the Brecon Beacons to be blown off course by Visit Wales ‘Years Of...’ approach, not least because strategy and public funding streams have been so aligned to it, but this would be to misunderstand the intention, which is to build up in the visitor’s mind, layer by layer, a clear and credible understanding of what Wales overall can genuinely

deliver (and importantly how it can make one feel). And, of course, not all parts of Wales can deliver all facets of the offer all the time. Wales has not stopped delivering 'Adventures' but 'Legends' now adds an appreciable depth, complexity and Sense of Place to those adventures. Also it is clear that there is enough 'wriggle room' within these themes to accommodate most destinations if they respond creatively to the challenge (even 'the Sea'). The inter-linked destination development priorities both 'hard' and 'soft' for the Brecon Beacons should and do transcend the exigencies of annual campaigns and revolve around playing to current strengths but addressing perceived weaknesses:

- **Adventure Activities** but increasingly coping with a wider range of abilities, interests and aspirations
- **Culture and Heritage Offer** inspired by and linked to landscape experiences, but offering 'wet weather' and evening options
- **Food and Drink Offer** telling the local Food story but providing good quality and value across the range and the day
- **Specialist/ Independent Retail** open at the times visitors want to go shopping
- **Welcoming Market Towns and Villages** with high quality public realm and access to amenities
- **Accommodation** which more than matches customer expectations in terms of location, quality and availability

Supported by:

- An effective dispersed **visitor information** network
- **Skilled** and welcoming **staff**
- Knowledgeable, self-reliant and helpful **Ambassadors**
- An **events** programme that means there is always 'something going on'
- A **visitor-savvy** approach to public and alternative **transport**

4.4. Partnerships and connectivity

Further to the analysis on page 26 we are recommending the following changes to the structure of the Sustainable Destination Partnership (subject to BBNPA's own review of partnerships):

- **The Annual Conference (early spring)** for all stakeholders becomes a formal part of the structure and the occasion for the SDPB to report back briefly on achievements over the last 12 months and seek general endorsement for plans for the following year including SDPB board positions - the 'shareholder meeting'. This does not require any changes to the overall, ethos, organisation or mechanics of the event.
- **The current Forum is reconstituted** with revised terms of reference to meet once annually (early autumn) as a high level joint action planning and product development event for key internal and external stakeholders - the equivalent of our institutional shareholders - to anticipate VW and other funding opportunities. (The Forum can then choose to meet again, appoint task and finish sub-groups or revert to DDG to work up particular projects and plans).
- **Membership of the Forum to be reviewed** to better suit its new purpose. Now that BBT has taken ongoing 'pastoral' responsibility for the 'clusters' for example their input could be channelled through BBT in future.
- **The MCG and D+R Groups are merged** into one 'Destination Delivery Group' (DDR) with revised terms of reference and cross-sectoral representation which provides technical and practical resources to implement the SDPB decisions and deliver the annual Action Plan
- **The SDPB meets 3 times per year** and concentrates on representing the 'shareholders': strategic direction, challenge, holding delivery organisations to account, resolving escalated issues.

- **The SDPB undertakes a 360 degree review** of the effectiveness and performance of the structure every 2 years to coincide with terms of Chairs⁴

In terms of communications to support this structure it is encouraging to note that 92% of survey respondents favoured e-bulletins and 55% welcomed networking events.

The Chairing Role

We believe trust and confidence is growing to the point where it should soon be possible to appoint a Chair from among those serving on any one group. It is a matter of judgement for the partners whether that point has already been reached. It may be too onerous, and indeed too 'cosy', to ask one person to Chair both DDG and SDPB (Inc. Forum and Conference). As a matter of principle it may be helpful to consider that if the SDPB chair is from the private sector then the Chair of the DDG should be from the public or voluntary sector and vice versa. In order to attract external candidates an honorarium should be considered for either or both posts if the holder would otherwise be out of pocket. Experience to date however suggests that incumbents have not taken on these roles for the financial reward....

BBNPA

At the time of writing BBNPA is making changes to its management structure. Lead responsibility for Tourism (including Marketing) on behalf of the Authority has been allocated to the Sustainable Development Manager post reporting to the Director of Countryside and Land Management. The Public Engagement Manager post, reporting to the Chief Executive, has lead responsibility for communications, interpretation, information and education including website. While this clarifies

⁴ At this stage in the destination's development we believe representative rather than meritorious membership of the Board and Forum is still valid to guarantee inclusivity. However, the proposed 2-yearly reviews could point up skills and knowledge deficits; training could be offered where appropriate and co-options, along with the appointment of chairs, could address any 'gaps'

significantly previous 'grey' areas, it will be imperative that these two posts work closely and cooperatively to optimise BBNPA's tourism support and return on investment and both should, for example, be involved in the proposed Destination Delivery Group.

The Destination Manager Role

In other destinations an individual working directly for the Destination Partnership or one of its constituent organisations is often identified as Destination Manager: providing a single-minded focus for external and internal day-to-day contact on DM issues, leading on action plan implementation and representing the destination on wider project groups. Until resources allow the Brecon Beacons to follow this model we recommend the role be shared between BBT and BBNPA.

Wider Partnerships

We would encourage the SDP to continue participation, when resources allow, in VW's Regional Fora and other external industry networks. However, we believe that targeted actions at a strategic political level alongside developing and delivering practical cross-border projects and activities at a tactical level will be more effective in building productive relationships in the long term.

5. How we will deliver

5.1 Action Plan 2017-2020

	Programme and Objectives		Action	Yr. 1,2,3	Lead	Partners	Cost H, M, L	KPIs
1	Presenting the Brecon Beacons							
1.1	Increase the number of visitor facing businesses and organisations adopting the Brecon Beacons brand and branding in their work	1.1.1	Research and address barriers and raise awareness to encourage more general adoption of the BB brand through industry communications and good practice case studies.	1-3	BBT/BBNPA to discuss and generate action plan for DDG/Board approval		L	% of BBT members actively using brand by year 3
		1.1.2	Encourage BBT members, Ambassadors and Brecon Beacons Tourism Award entrants to adopt the brand	2	BBT	BBNPA	L	% Of award winners 'brand compliant'
		1.1.3	Generate and 'curate' high	1-3	BBT/BBNPA to	Industry	L	+ Online

			quality 'on brand' content for website, print media, PR and SM channels, ensuring that cooperative processes deliver high quality delivery for all channels		discuss and generate action plan for DDG/Board approval			Reputation
		1.1.4	Develop co-branding relationships with locally based national producers e.g. food and drink, events	3	BBT/BBNPA to discuss and allocate responsibilities	SDPB	L	At least 1 new 'deal' per year
		1.1.5	Increase BB content and brand take-up in 'overlapping' destination content/ campaigns	3	BBT/BBNPA to discuss and allocate responsibilities	UAs	L	50% of relevant destination campaigns embracing BB content and brand messages
1.2	Improve management of the 'visitor journey'	1.2.1	Review the process of managing, updating, mediating and maintaining the Destination website,	1	DDG Working Group to discuss, form a draft plan and allocate	SDPB	L but M if more work is required	New protocol established and roles allocated

		<p>social media channels, print media and social community management to better meet industry and visitor needs, including:</p> <ul style="list-style-type: none"> • Database management (business and destination level) • Social Media protocols • Website design, performance and analysis • Feedback, UGC and review systems <p>NB: It will be essential to agree responsibilities for all elements of consumer facing communications.</p>		responsibilities for confirmation DDG and then Board			
			1-3				TBA

		1.2.2	Implement the Visitor Management Plan (Inc. Visitor Information), paying particular attention to the main routes used by visitors into and within the National Park	1-3	BBNPA	SWOAPG BBT Landowners	M	Visitor satisfaction and feedback
		1.2.4	Review the coordinated delivery of information within the destination	2	BBNPA, BBT	DDG	L	
1.3	Provide added value from each visitor through 'soft packaging' of broader and deeper experiences	1.3.1	Develop a process for developing innovative product marketing initiatives covering elements such as those listed in 1.3.2 below.	1	New BB Forum DDG Subgroup	DDG	L	Mechanism established
		1.3.2	Develop 'soft packaging' initiatives e.g. 'Day to Stay' incentives (Yr. 1)	1	DDG Sub-group	DDG	L and M*	Number and range of initiatives, numbers of

			Evening/ family offer (Yr. 2) Innovative transport solutions* (Yr. 2-3) Autumn/ Winter ‘seasons’ and events (Yr. 1) Cultural ‘bonus’ of a Brecon Beacons visit (Yr. 2) ‘Years of...’ experiences (Yr. 1-3)					businesses involved. Sustained activity Take up levels and outcomes of above by visitors
2	Working Together							
2.1	Improve effectiveness of Destination Management	2.1.1	Investigate scope and feasibility of dedicated destination manager role	1	SDPB		L	Study completed
		2.1.2	Agree and implement revised SDP structure with clearer roles and accountabilities and communication lines	1	SDPB	SDP Forum	L	New structure implemented
		2.1.3	Build on existing	1-3	DDG	Board	L	Newsletters sent

			destination e-newsletter and meeting framework to improve within destination communications					
2.2	Improve working relationships with stakeholder local authority areas	2.2.1	Agree and implement at least one practical project each year in partnership with neighbouring/ overlapping destinations (product development or marketing) e.g. 'Alternative Waterfalls Country' with NPTC and RCT, World Heritage Site/ Canal with TCBC and MCC, A470/ Taff Trail Route with MTCBC, RCT, Cardiff	1-3	DDG	VW UAs CRT Sustrans	M	Project implemented and project objectives achieved Co-branding with BB evident
		2.2.2	Initiate annual meeting with neighbouring / overlapping local authorities (at senior	2,3	BBNPA	UAs	L	Meeting outcomes achieved from a BB perspective

			manager/ cabinet level) to discuss shared economic and regeneration priorities including tourism					
2.3	Enhance BB visitor-economy focus of stakeholder statutory and non-statutory bodies	2.3.1	Through internal presentations and communications ensure understanding of and buy-in to Strategy and Action Plan across BBNPA Members and Officers (Yr. 1) and offer presentations to 1 other key stakeholder body per year e.g. NT, NRW (Yr. 2 and 3)	1 -3	SDPB	BBNPA BBT	L	Satisfaction levels from Presentations Coverage of Tourism in BBNP Place Plans
3	Looking after our visitors							
3.1	Deliver a higher skilled welcome	3.1.1	Identify skills gaps and training and development needs of the sector within BB through targeted comms	1	BBT BBNPA	HE/Business Wales	L	Survey results shared

			and online survey					
		3.1.2	If formal training is identified by 3.1.1 encourage training providers to deliver against identified needs through local delivery tailored to the sector	2	DDG	FE/ HE	L	New opportunities offered to industry by FE/ HE in the area
		3.1.3	Provide any informal training needs, especially linked to new product development, through industry networking and learning events	2,3	BBT BBNPA		M	Numbers participating and satisfaction levels
		3.1.4	Maintain and enhance the Ambassador programme with links to: <ul style="list-style-type: none"> • Dispersed Visitor Information Provision • Volunteer support for Events 	1-3	BBNPA	BBT	M	Overall number of Ambassadors engaged and those with new CPD skills

			<ul style="list-style-type: none"> • On-line content and champions • Geopark and other specialisms • “Years Of” Specialist knowledge 					
		3.1.5	Drawing on good practice elsewhere investigate and implement measures to make the Ambassador cohort and programme increasingly self-reliant	2-3	BBNPA	BBT VW	L	Sustainable Ambassador Network
3.2	Deliver a higher quality experience in line with the brand promise for the Brecon Beacons (and Wales)	3.2.1	Identify and implement key development product projects including public realm and infrastructure in support of BB brand and strategic priorities: <ul style="list-style-type: none"> • Adventure Activities (Inc. low-level and accessible) 	1-3	UAs/ BBNPA BBT	VW	H	Identify champions to lead each area of activity. Partnership should work towards a medium term project plan for

		<ul style="list-style-type: none"> • Culture and Heritage • Food and Drink • Welcoming Towns and Villages <p>The Geopark Action Plan will form an integral part of this Action Plan but is managed by the Geopark Management Group. The work of the Geopark will be integrated with this plan through DDG.</p> <p>In addition develop coherent responses to the Years of ensuring that the integrity and priorities of this strategy are incorporated:</p> <ul style="list-style-type: none"> • Adventure 					<p>each incorporating how they address seasonality and day v staying visitors.</p>
--	--	---	--	--	--	--	--

			<ul style="list-style-type: none"> • Legends • Sea • Discovery • Wales Way • Future Years of 					
		3.2.2	Develop protocols/ agreements with stakeholders to manage activity 'pinch points' e.g. 'Alternative Waterfalls' or Pen-y-Fan in line with Visitor Management Plan	2	BBNPA	UAs Owners SWOAPG	M	1 new protocol established Improved visitor satisfaction
		3.2.3	Secure upgrading/new private sector capacity in line with long-term customer demand and product priorities (Information and support role through SDP)	1-3	Industry	VW BBT BBNPA UAs	H	Proportion of all-Wales investment coming to the Beacons
3.3	Better understand	3.3.1	Maintain STEAM or equivalent volume and	1-3	BBNPA	BBT	M	Growth at least in line with

	our visitors, our businesses and the destination to provide the evidence base for action and evaluation		value model for the Destination continued ongoing recruitment to Wales Occupancy Survey					Wales average
		3.3.2	Encourage industry to promote on-line visitor survey to gain qualitative data ⁵	1-3	BBT	BBNPA	M	Satisfaction and recommendation levels
		3.3.3	Stakeholder research to assess satisfaction levels with destination performance and delivery	3	DDG	BBNPA - Forum BBT - business survey	M	Satisfaction levels amongst Forum members and tourism industry
		3.3.4	Undertake regular reputational analysis for	1-3	DDG	BBT	L	Improved reputation.

⁵ Full face-to-face Visitor Survey undertaken in 2016 and therefore unlikely that it will be repeated before 2020

			destination through online channels					
		3.3.5	Explore working with HE to develop ‘observatory’ model for future tourism trends (ideally in partnership with wider region)	3	DDG	HE VW City Region	M	Model established
		3.3.5	Develop a coordinated data development and reporting plan to ensure sufficient feedback for management decision making	1	DDG	BBT BBNPA	H	

6. Appendices:

- Steam 2015 Output
- Brecon Beacons Accommodation Breakdown
- Attractions within the 'greater' Brecon Beacons
- Visitor Survey Summary

STEAM FINAL TREND REPORT FOR 2004-2015
BRECON BEACONS NATIONAL PARK

Comparing 2015 and 2014
 2014 in 2015 prices (1.011)

COMPARATIVE HEADLINES

KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2014 - INDEXED TO 2015

KEY	KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2015 & 2014 - INDEXED TO 2015																		
	Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types			
	Serviced			Non-Serviced															
	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	2015	2014	+/- %	
Visitor Days	M	0.263	0.236	11.5%	0.849	0.731	16.1%	0.125	0.126	-0.2%	1.238	1.093	13.2%	3.815	3.718	2.6%	5.033	4.811	5.0%
Visitor Numbers	M	0.148	0.132	11.6%	0.130	0.111	17.0%	0.053	0.053	-0.2%	0.331	0.296	11.5%	3.815	3.718	2.6%	4.146	4.015	3.3%
Direct Expenditure	£M																177.65	164.77	7.8%
Economic Impact	£M	36.47	32.74	11.4%	76.18	65.56	16.2%	7.328	7.343	-0.2%	119.98	105.64	13.6%	118.95	115.93	2.6%	238.93	221.56	7.8%
Direct Employment	FTEs	800	769	4.0%	1,106	1,004	10.2%	72	70	3.6%	1,979	1,843	7.3%	1,169	1,098	6.4%	3,147	2,941	7.0%
Total Employment	FTEs																3,823	3,546	7.8%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2015 & 2014 - INDEXED TO 2015



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2015



Sectors

Sectors	2015	2014	+/- %
Accommodation	1,112	1,108	0.4%
Food & Drink	986	882	11.8%
Recreation	267	258	3.7%
Shopping	535	475	12.6%
Transport	246	219	12.7%
TOTAL DIRECT	3,147	2,941	7.0%
Indirect	675	605	11.6%
TOTAL	3,823	3,546	7.8%

Sectoral Distribution of Employment - FTEs



Report copyright © Global Tourism Solutions Ltd 2016

Report copyright © Global Tourism Solutions Ltd 2016

Accommodation Category	Businesses 2011	Bed Spaces 2011	Businesses 2016	Rooms/ Units 2016 ⁶	Bed Spaces 2016
Serviced accommodation					
+50 room hotels	-	-			
11-50 room hotels	23	993	22	468	981
<10 room hotels/others	148	1127	148	523	1112
Serviced total	171	2120	170	991	2093
Non-serviced accommodation					
Self catering	283	2361	259	389	1556
Static caravans/chalets	5	360	64	1734	5374
Touring caravans/camping	60	4725			
Not-for-hire statics	-	476			
Hostels			28		959
Non-serviced total	348	7922	351	2123	7889
Total	519	10042	521	3114	9982

⁶ The latest destination bedstock figures are awaited – quoted are figures currently held by STEAM

Attraction	Number of visits 2009/10	Number of visits 2015	Entry	Open
Big Pit National Coal Museum	155,631	147,085	Free	Year round
Brecon Beacons NP Visitor Centre*	142,809		Free	Year round
Garwnant Visitor Centre	110,000	85,725	Free	Year round
Craig-y-nos Country Park*	97,814		Free	Year round
Brecon Mountain Railway*	71,298		Paid	Year round (not Nov)
Dan Yr Ogof, National Showcaves Centre for Wales*	69,057		Paid	Seasonal
Newton House, Dinefwr Park and Castle	68,160	64,705	Paid	Year round
Cyfarthfa Castle Museum & Art Gallery, Merthyr Tydfil	66,874	55,057	Free	Year round
Llancaiach Fawr Manor, Treharris	45,587	64,907	Paid	Year round
Cantref Adventure Farm park	41,200		Paid	Seasonal
Brecon Cathedral and Heritage Centre	30,000		Free	Year round
Blaenavon World Heritage Centre	29,181		Free	Year round
Pontypool Museum	28,435		Paid	Year round
Brynich Play Barn, Brecon	28,000		Paid	Variable

Abergavenny Museum and Castle*	25,827		Free	Year round
Aberdulais Falls*	25,705	26,855	Paid	Year round
Blaenavon Ironworks	23,135	29,107		
Brecknock Museum and Art Gallery, Brecon*	20,629	1,203	Free	Year round but closed to public ahead of cultural hub development
Carreg Cennen Castle, Llandeilo*	19,650	23,345	Paid	Year round
Waterfalls Centre, Pontneddfechan	17,829		Free	Year round
Royal Welsh Regimental Museum, Brecon*	15,693	11,943	Paid	Year round
Pontypool and Blaenavon Railway	13,767		Paid	
Tretower Court*	13,636	13,587	Paid	Year round
Blaenavon Cheddar Co and Mountain Tours	2,474		Free	Year round
Shell Grotto, Pontypool	1,362		Free	
Penderyn Distillery, nr Aberdare			Paid	Year round
Erwood Station Craft Centre			Free	Year round
Llanthony Priory			Free	Year round
Llandovery Heritage Centre			Free	Year round
Black Mountain Red Kite Feeding Station			Paid	Year round
Goytre Wharf and			Free	Year round

Canal Visitor Centre				
Dinas Rock		39,077	Free	Year Round
Blaina Heritage Museum		5,689	Free	Year Round
White Castle*			Paid	Seasonal staffing only
Aberglasney Gardens*			Paid	Year Round
St Mary's Priory and Tithe Barn Abergavenny			Free (Donation)	Year Round
Llangorse Multi- Activity Centre			Paid	Year round

* Attractions whose visitor figures are included in the STEAM model for the Brecon Beacons

Survey Summary

Survey consultation took place during November and December 2016. A wide cross section of businesses, organisations and individuals took part resulting in the engagement of 100 respondents online together with approximately 40 businesses via a face to face group session involving members of Brecon Beacons Tourism Association (BBT).

Topic areas, based around the existing strategy and action plan covered

Marketing and Promotion

Infrastructure and Services

General Aspects

The survey also allowed plenty of opportunity for open comment and observations regarding a wider range of issues.

62 of the online survey respondents were members of BBT and the sample included a fairly even distribution of business types (e.g. activity provider, self catering, serviced, camping) and geographical spread. 47 businesses were in a grading scheme.

58 of those taking part had been involved with the tourism sector in the Brecon Beacons for over 5 years (in fact 36 of them over 10 years) but there was participation from 32 who stated that they had been involved for between 1 to 5 years and 10 who had only been part of the sector for the last 12 months.

The **majority of respondents (50%) were based in the Brecon and Crickhowell postcode areas** with 7% from the Hereford postcode, 5% from Abergavenny and 8% from Swansea. Only two businesses responded from the western area of the National Park, both of these based in and around Llandeilo.

Marketing

Of the 76 organisations that commented with regard to marketing statements approximately **80% strongly agreed or agreed** that the Brecon Beacons area

- Is recognised as a strong tourism brand for UK visitors
- That there is adequate (aftercare) information for visitors post arrival

- That the area showcases its natural heritage and wildlife well via its marketing activity (and that the marketing activity encourages visitors to conserve the landscape and wildlife)

Around 70% of respondents also strongly agreed or agreed that

- Events are promoted well
- The brand is conveyed and executed well
- They are clear on the tourism roles of the main organisations (in the marketing context)

Only 64% agreed that the area's cultural heritage and arts offer was well showcased in marketing and there was just under 70% agreement on the statement "The Brecon Beacons website performs for businesses. This latter figure should, in reality, be higher and with over 30% *disagreeing/strongly disagreeing* that the site performs "well for businesses" there is a clear imperative to find solutions for clarity and effective promotion in order to meet performance expectations and raise satisfaction levels. Respondents noted that

"The destination website is still very difficult to navigate to find simple options in the area, and performs very poorly for my own company activities"

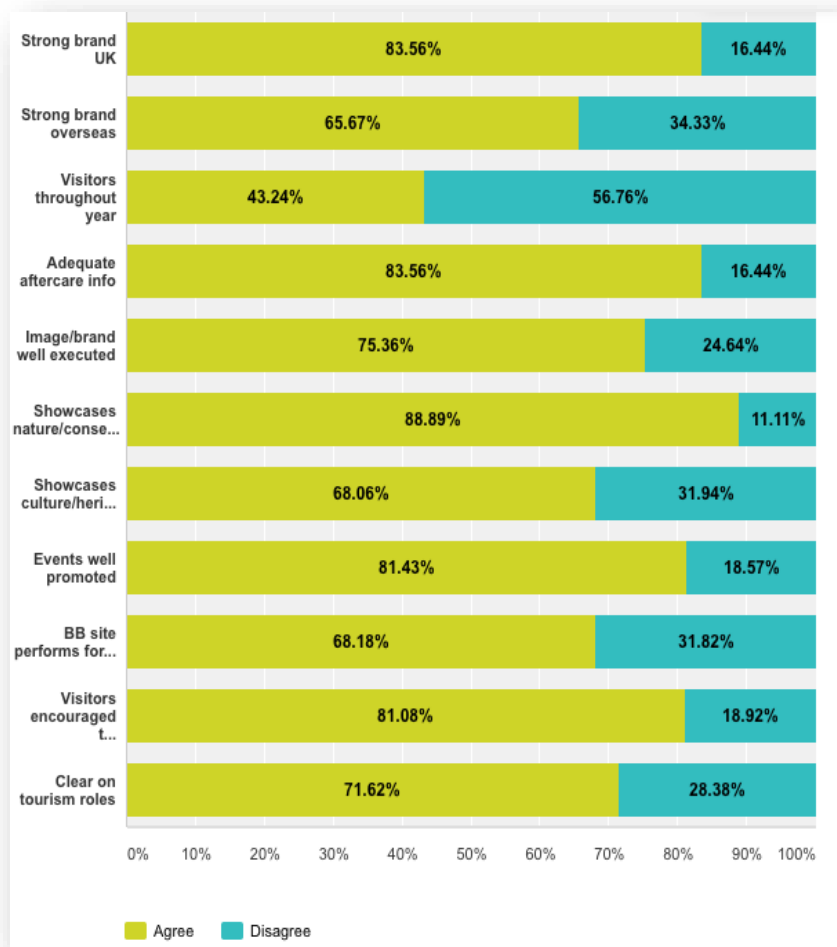
While another stated,

"There appears to be an un-coordinated approach to marketing and promoting the BBNP. It is actually difficult to drill down for the information you want because there is no initial single point of contact."

NB: The above sentiment has resonance with the, on occasion, disparate nature of social media activity that has been observed as part of the review (Appendix)

The **clearest area of disagreement related to seasonal spread of visitors** with 57% disagreeing/strongly disagreeing that "(the area) attracts enough visitors throughout the year". That said, the remaining respondents (i.e. 43%) agreed with the statement, a view that is not the norm in some other rural destinations in Wales. (See figure 1 overleaf)

Figure 1



Infrastructure and Services

In this section we found that Transport and Retail (choice and spread) are the areas of **main concern** and that Events, attractions and provision of Tourist Information Centres are seen as **important and scored highly**.

NB: It is worth noting that, in the 2016 visitor survey, 88% of the 1500 visitors surveyed had arrived by private or hire car.

	Strongly Agree	Agree	Disagree	Strongly disagree	N/A
The destination succeeds in managing visitor pressure throughout the area	5.26% 4	51.32% 39	27.63% 21	5.26% 4	10.53% 8
The Brecon Beacons provides and promotes a good range of public transport	1.32% 1	32.89% 25	47.37% 36	14.47% 11	3.95% 3
The destination provides good basic visitor services (e.g. car parking/toilets)	6.58% 5	42.11% 32	39.47% 30	10.53% 8	1.32% 1
Broadband connectivity is adequate for my organisation's / business needs	3.95% 3	36.84% 28	28.95% 22	22.37% 17	7.89% 6
The level and quality of signposting (road/highway) in the destination is adequate	9.21% 7	61.84% 47	21.05% 16	7.89% 6	0.00% 0
The level and quality of signposting (footpaths, cyclepaths, bridleways) in the destination is adequate	2.63% 2	69.74% 53	23.68% 18	3.95% 3	0.00% 0
The destination's food offer is of a good quality and offers options at all levels	13.16% 10	60.53% 46	22.37% 17	3.95% 3	0.00% 0
The retail (i.e. shopping) offer within the destination is good quality and offers options at all levels	3.95% 3	42.11% 32	44.74% 34	3.95% 3	5.26% 4
Conservation of the area's built heritage is undertaken well	10.53% 8	77.63% 59	10.53% 8	0.00% 0	1.32% 1
Upkeep and appearance of villages and towns is well executed	5.26% 4	64.47% 49	23.68% 18	5.26% 4	1.32% 1
I am clear on the roles and responsibilities (in the context of infrastructure and services) played by the National Park Authority, Brecon Beacons Tourism and other bodies	10.53% 8	46.05% 35	38.16% 29	1.32% 1	3.95% 3
The range and quality of visitor attractions is good Strong agreement	14.47% 11	67.11% 51	14.47% 11	2.63% 2	1.32% 1
Provision of a Tourist Information Centre is important for visitors (and businesses)	63.16% 48	31.58% 24	5.26% 4	0.00% 0	0.00% 0
The Brecon Beacon's has a good range of events throughout the year	17.11% 13	65.79% 50	13.16% 10	2.63% 2	1.32% 1

The 2016 visitor survey records that 92% of those surveyed strongly agreed (65%) or agreed (27%) that the “*National Park seems well managed and cared for*”.

General Aspects

Spread of visitor spend is still a concern and the statement “The Brecon Beacons has a good level and spread of visitor spend across the area” split the respondents (39% agreeing and 41% disagreeing).

There was a clear majority (varying between 60 to 80%) in agreement with statements that dealt with **provision of skills training** (72%) and **business support** (62%) and ample opportunities to get involved with activity at a destination level. (78%)

When respondents were asked to cite what the “**Top 3 Weakest Aspects**” of the destination (in their view) were, the following were most frequently the first to be mentioned with “Public transport” options and “parking” the dominant choice.

Food Outlets Signal Provision Toilets Weather
 Promotion **Town** Understand **Park** Eat
Public Transport Accommodation
Marketing Support **Honey Pot**
 Opportunities **Brecon** Quality **Opening Hours** Mobile
 WiFi

The “**Top 3 Strongest Aspects**” clearly showed that “landscape” was a shared view in terms of its strength with reputation (of the Brecon Beacons) coming in second place.

Countryside Levels **Product** Scenery
Conservation Understand
Natural Beauty Walking **Reputation**
 Marketing **Landscape** Brecon Beacons
Outdoor Place **Brand** Attractions **Mountains**
 Access

Finally, respondents were asked to give their views on the “**Top 3 Must See**” attractions in the area for a first time visitor and “Walking”, “Pen y Fan”, “Waterfalls” were repeatedly mentioned as was the “Canal”.

