

Sustainable Tourism – Brecon Beacons National Park Authority

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Summary report

Summary

What we reviewed and why

- 1 Wales' three National Parks are well known tourism destinations, and their status provides a strong brand image which extends beyond their boundaries. With visitor numbers growing, each of the National Park Authorities has seen an increase in the demands to conserve the special qualities of their Parks.
- 2 The Welsh Government's priorities for National Parks have long included a focus on growing tourism and outdoor recreation in a sustainable manner, and proactive engagement with tourism providers to identify how they can contribute to achieving the sustainability of the area.
- 3 In a wider policy context also lies the Welsh Government's ambition for the visitor economy to 'grow tourism for the good of Wales'¹. The strategic remit letter issued by the Welsh Government's Minister for Environment, Energy and Rural Affairs in March 2021 reaffirms the National Park Authorities' important role in developing sustainable tourism and outdoor recreation².

Exhibit 1: the United Nations World Tourism Organisation definition of Sustainable Tourism



'Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.'

Source: <https://www.unwto.org/sustainable-development>

- 4 Managing access, tourism and its impact can be a challenge for National Park Authorities. Proportionally, they own very little land within the National Parks, and they do not directly control national or regional tourism and destination

¹ Valued and Resilient: The Welsh Government's Priorities for Areas of outstanding Natural Beauty and National Parks, July 2018.

² Welcome to Wales: Priorities for the Visitor Economy 2020-2025.

management strategies³ (with the exception of Brecon Beacons National Park Authority, which is the destination management organisation along with Brecon Beacons tourism). The tensions between the two statutory purposes and duty of a National Park Authority came to the fore when visitors flocked to the Parks in unprecedented numbers during their re-opening in 2020.

- 5 Consequently, COVID-19 has highlighted the important role of National Park Authorities in promoting and managing tourism. The local economy of each Park depends heavily on tourism, but it needs to be managed sustainably to ensure the natural landscape, biodiversity and local communities are not overwhelmed and left, on balance, worse off as a result.

What we found

- 6 Our review sought to answer the question: **Is the Authority doing all it can to effectively manage sustainable tourism in the National Park?** We undertook the review during the period December 2021 to February 2022.
- 7 Overall, we found that: **'Future Beacons'⁴ contains an ambitious agenda building on existing partnerships, but the Authority will find it hard to deliver this vision unless it effectively targets resources, builds capacity and successfully influences behaviour to manage the impact of tourism.**
- 8 We reached this conclusion because:
 - the draft National Park Management Plan 'Future Beacons' contains a bold agenda for sustainable tourism, but the Authority does not have the capacity and systems in place to deliver its ambitious vision;
 - the Authority works effectively through formal partnerships but less so with local communities; and
 - the Authority is not effectively influencing the behaviour of visitors and businesses to manage the impact of tourism.

³ Environment Act 1995.

⁴ <https://www.beacons-npa.gov.uk/the-authority/who-we-are/npmp/management-plan-review/>

Recommendations

The table below sets out the recommendations that we have identified following this review.

Recommendations

A shared vision of sustainable tourism

R1 We recommend that the Authority:

- define and agree a shared vision of sustainable tourism which has been developed through the full involvement of Members, Officers (including 'front-line' staff) and other relevant stakeholders.

Re-build tourism staff capacity

R2 We recommend that the Authority:

- review current tourism staff capacity in line with the aspirations of Future Beacons, its National Park Management Plan;
- re-build tourism and staff capacity to allow delivery of the goals of Future Beacons; and
- consider the need for additional staff capacity in appropriate specialisms eg communications and data analysis staff.

Improve stakeholder involvement

R3 We recommend that the Authority:

- build on its positive activity around stakeholder engagement (eg stakeholder mapping and the Business Ambassador Scheme) to influence stakeholders to collaborate with the Authority to achieve the goals within Future Beacons.
- seek to influence the behaviour of visitors by working with and involving businesses in delivering the goals within Future Beacons

Detailed report

‘Future Beacons’ contains an ambitious agenda building on existing partnerships, but the Authority will find it hard to deliver this vision unless it effectively targets resources, builds capacity and successfully influences behaviour to manage the impact of tourism

The draft National Park Management Plan ‘Future Beacons’ contains a bold agenda for sustainable tourism, but the Authority does not have the capacity and systems in place to deliver its ambitious vision

- 9 Between 17 November 2021 and 4 March 2022, the Authority consulted on its draft Management Plan, Future Beacons. Future Beacons is a comprehensive and ambitious plan which is generally well thought of among Members and officers we interviewed and surveyed. It contains a specific ‘Sustainable Tourism’ policy which sets out a clear vision of sustainable tourism for the National Park and includes detail on how the policy will be implemented, what success will look like and how the Authority will measure progress against its objectives. It also includes a specific ‘Busy Places’ policy which describes how the Authority plans to manage its sites of ‘over tourism’ and which is particularly encouraging to see.
- 10 Members and senior officers we spoke to told us that they worked collaboratively with key stakeholders to produce Future Beacons. Many front-line staff we spoke to noted that they had been effectively involved in developing this plan, but this was not universal. Some officers told us they were not involved in key decisions around their areas of expertise. And while Future Beacons contains a clearly articulated vision of sustainable tourism for the Park, in practice many officers and members we interviewed regard it as ‘ideological’ and raised concerns that consequently elements of the Plan could be undeliverable.
- 11 Almost all officers and members told us that the Authority struggles to agree on its priorities generally and particularly with regard to tourism. Despite the positive work on developing ‘Future Beacons, some officers and members question whether the Authority has an agreed vision of tourism,’ while others did not accept there is a need for the Authority to manage sustainable tourism, claiming the Authority ‘should not be bothering with visitor management at all’.
- 12 National Park Authorities have two statutory purposes under the Environment Act 1995: to conserve and enhance the natural beauty, wildlife and cultural heritage of the National Parks; and to promote opportunities for the understanding and enjoyment of the special qualities [of the Park] by the public. If there is a conflict between these two purposes, greater weight should be given to the former (the

'Sandford Principle.')

) but it is expected that National Park Authorities work to effectively balance the tensions between these two purposes. However, the consensus of the officers and members we spoke to was that the Authority does not do this well at present.

- 13 One of the Authority's strengths has always been its people. Authority officers involved in managing and promoting tourism are generally highly knowledgeable, experienced and dedicated. Members have excellent awareness and understanding of the issues around sustainable tourism, including the impacts on the climate, biodiversity and local communities. In addition, the Authority appointed a new Chief Executive in July 2021 and officers we spoke to were positive about her vision for and direction on sustainable tourism.
- 14 However, the capacity of the Authority to manage and promote sustainable tourism has declined in recent years. The sustainable tourism manager was made redundant in January 2021 as part of a restructuring programme and has not been replaced. Many other staff engaged in tourism and communication work have also left the Authority in recent years. Staff working in sustainable tourism report that this lack of capacity means they have to 'fire-fight' and 'deal with each day as it comes' rather than being able to pursue long-term, strategic projects and objectives. The 'hotspots' of the Park such as Pen y Fan and Waterfall Country are heavily visited tourist sites, and this was particularly the case during 2020 and 2021 due to the COVID-19 pandemic. This put significant pressure on the facilities of the Park including toilets and waste disposal. Lack of capacity has considerably hindered officers' efforts to manage the challenges presented to them by increased visitor numbers and the 'new type of visitor' (those who would normally holiday abroad who have chosen to holiday in the UK as a result of the pandemic).
- 15 In particular, the lack of dedicated communications staff means that officers are not able to work strategically to communicate public information to help manage and prevent issues of over-tourism and problematic public behaviour. Officers feel that they are currently too negative in their communications with the public and dissuade people from visiting popular sites, which are often inundated by visitors, and managing the negative impact of 'wild camping'. They believe messaging should be more focussed on the benefits of visiting the National Park in an informed, managed and controlled way. Authority officers and members also told us that they believe that the annual Welsh Government funding cycle does not allow the Authority to plan in the long term to invest in infrastructure for sustainable tourism.
- 16 As a result of these challenges, we found that staff morale and resilience are low. Many skilled and experienced staff have left, and the Authority risks losing more if positive organisation change and working conditions do not improve. Officers have told us there are some important barriers to re-building capacity. For example, the over reliance on staff being employed on short-term and temporary contracts rather than permanent full-time posts, which is constraining the Authority's ability to plan both communication and tourism management strategically or in the long term. We anticipate that the recently updated scheme of delegation approved by the

Authority in February 2021 will help address this and build appropriate tourism staff capacity.

- 17 More positively, we have observed some good practice and innovative approaches developed by the Authority. For example, the 'Meet and Greet' teams who are located at the most popular visitor areas and provide information and advice especially to people who may be less familiar with the National Park. These teams were funded by Welsh Government hardship funding, provided during the pandemic. While these services currently have short-term funding, we understand these monies will not be provided in the long term and therefore the sustainability of the Meet and Greet teams remains a concern.
- 18 The Authority has also started to run events aimed at getting people to enjoy more sustainable activities which are not detrimental to the environment such as the Dark Sky Festival.

The Authority works effectively through formal partnerships but less so with local communities

- 19 To drive progress on sustainable tourism, it is essential that the Authority works well with its partners. Unlike the other two National Parks, the Authority is in a unique position as the Destination Management Organisation (along with Brecon Beacons Tourism) for its areas. Consequently, it has more influence than other National Park Authorities to manage messaging and promotion of tourism within its area. The relationships the Authority has with Brecon Beacons Tourism and Visit Wales are considered to be strong and effective.
- 20 Given the impact of tourism on local communities, developing positive relationships and effectively involving local people in the work of the Authority are vital. The Authority engages with many different groups and mapped out its approach to stakeholder engagement in the development of 'Future Beacons' which was consulted on publicly between November 2021 and March 2022. To provide local communities with 'a seat at the table' alongside other partners, a Charitable Incorporated Organisation called Waterfalls Country Cymru was set up in January 2020. In addition, the Local Access Forum is viewed as effective in providing advice to the Authority on improving access to the Park. And the 'Rural Alliances' scheme is highly thought of. Interviewees told us that it has helped to improve links with communities in the context of tourism.
- 21 However, despite this positive engagement work, a number of officers and members expressed concerns that local communities have not seen much if any benefit from their work and continue to be detrimentally affected by increases in visitors.
- 22 In many cases, we found that the Authority is currently not able to effectively influence its key partners. This is partly due to the inherent geographical complexity of the Park. The Park's land covers a total of nine local authority areas and the Authority includes members from seven (Powys, Torfaen, Monmouthshire, Blaenau Gwent, Carmarthenshire, Merthyr Tydfil, and Rhondda Cynon Taf)

compared with Snowdonia National Park which covers two and Pembrokeshire Coast National Park which covers one. In addition, the Authority does not own most of the land within the National Park, with key sites owned by charitable bodies such as the National Trust, Natural Resources Wales or private landowners.

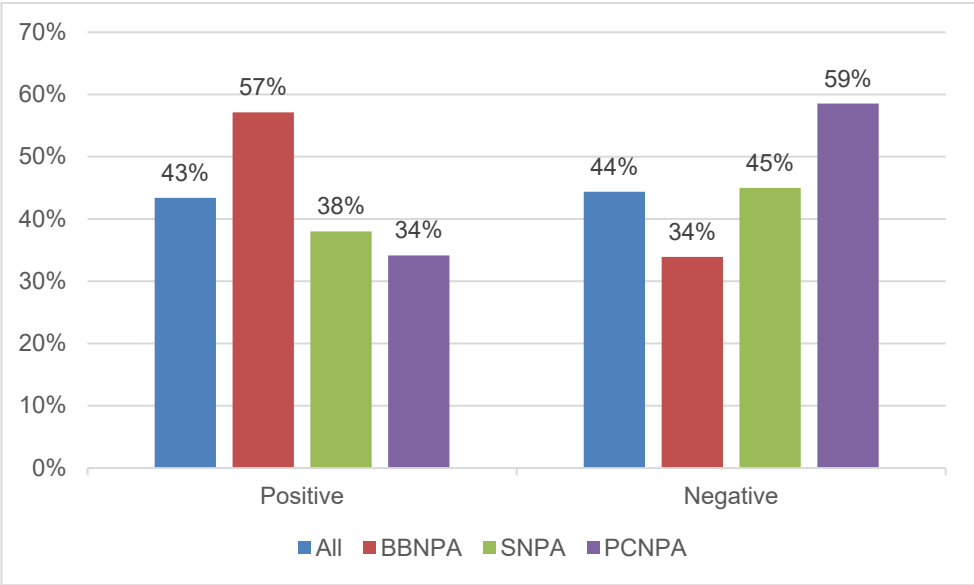
- 23 More informal and regular day-to-day engagement work with local communities is inconsistent. One officer told us 'Sometimes town and community council clerks contact us to inform on events and things happening on the group. There is no communications process to understand intelligence from communities. Our outreach program has been curtailed – we have very little presence and visibility. We are becoming more and more closed off and isolated.
- 24 Some anti-social behavioural issues such as off-road motorcycling, fall outside of the Authority's enforcement powers and must therefore be tackled by either (or both) local authorities or the police. Authority officers and members told us that the issue of off-road motorcycling is not being effectively tackled at the moment, 'falling in-between the cracks' of the different agencies.
- 25 There is consensus among officers and members that the transport infrastructure within the National Park is insufficient to help manage tourism sustainably. In particular, longstanding poor public transport remains a major barrier to improving access and reducing car congestion. To address this requires the Authority, local councils and the National Trust to collaborate. The Authority has prioritised improving public transport to access the Park for many years and 'Future Beacons' includes specific goals around sustainable transport especially to the Park's busiest locations. For example, one goal is that 'at least 75% of visits to the Park are supported by a sustainable form of transport, including electric vehicles or public transport'. However, progress in this area has historically been limited and requires significant investment and agreement between key partners if progress is to be made.

The Authority is not effectively influencing the behaviour of visitors and businesses to manage the impact of tourism

- 26 In order to effectively influence public behaviour, the Authority needs to use data to understand the 'visitor experience.' Future Beacons' Busy Places policy states that progress will be measured through Visitor Surveys (as well as review of websites such as TripAdvisor). The Authority collects data from some of its Visitor Centres; however, this data is currently not being utilised due to diminished data analytic capacity. We are aware that the Authority is planning to rebuild this capacity and we would expect this to be given appropriate priority within the new staff structure.
- 27 Influencing private sector partners is crucial in making tourism more sustainable. The Authority has generally positive relationships with local tourism businesses. Our survey of tourism businesses within National Parks in Wales found that promotion of sustainable tourism by the Authority is highly regarded, especially in comparison with the other National Park Authorities (**Exhibit 2**). Officers and

members we spoke to credit the Authority’s ‘Business Ambassador’ scheme with developing and strengthening these relationships.

Exhibit 2: tourism businesses’ views on the promotion of sustainable tourism by the three Welsh National Park Authorities

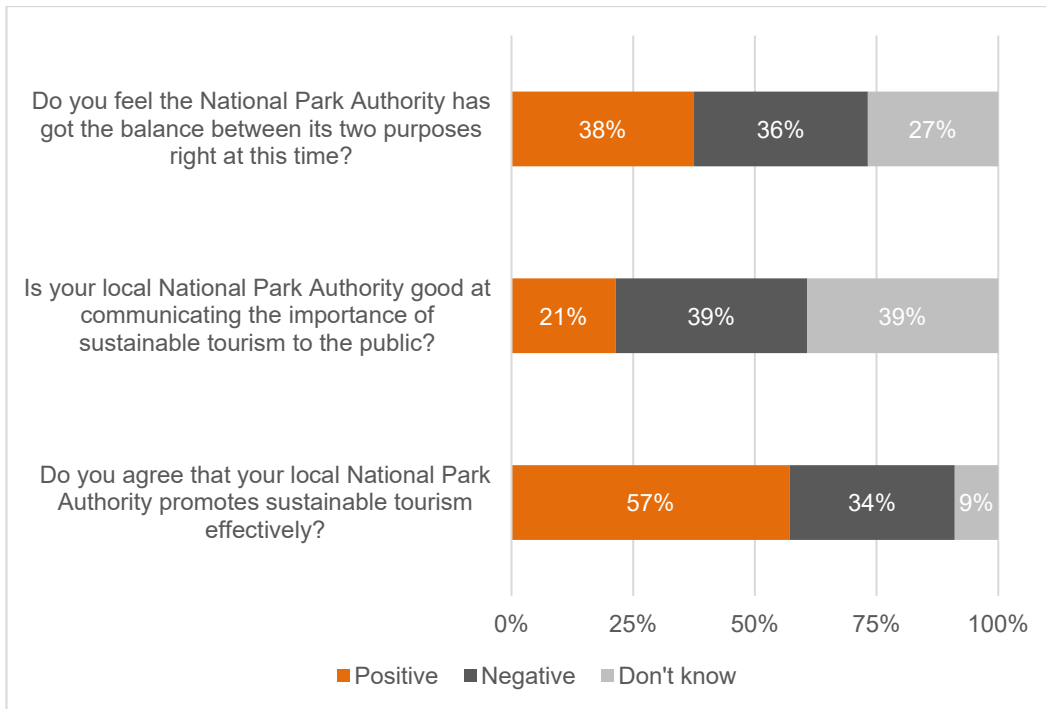


Base for SNPA = 100, BBNPA = 56, PCNPA = 41

Source: Audit Wales Survey of Welsh Tourist Businesses, January 2022

28 However, while tourism businesses’ views on the Authority’s promotion of sustainable tourism are largely positive, their views on other aspects of the Authority’s approach to sustainable tourism are less positive (**Exhibit 3**). While Brecon Beacons had the highest positive response of all three National Park Authorities, only 38% of tourism businesses responding to our survey believe that the Authority has got the balance right between its two purposes. Additionally, only 21% of survey respondents believe that the Authority is good at promoting the importance of sustainable tourism to the public, possibly an impact of the diminished staff tourism and communication capacity noted above.

Exhibit 3: tourism businesses' views on the Authority's approach to sustainable tourism (Base = 56)



Source: Audit Wales Survey of Welsh Tourist Businesses, January 2022

Appendix 1

Methodology

To inform our overall conclusions we explored the following lines of enquiry:

- Does the Authority have the right vision, resources and systems in place to effectively promote and manage sustainable tourism?
- Is the Authority influencing behaviour of key stakeholders to promote and manage the impact of tourism?

We undertook the review during the winter of 2021-22. Our methods included:

- consolidating our cumulative audit knowledge and experience.
- a survey of National Park tourism businesses promoted via Visit Wales. Across Wales, 281 businesses responded to our survey. Of these, 204 were located within, or operate mainly within, the boundaries of a Welsh National Park and 61 were based in the Brecon Beacons. The data presented in this report focuses on the responses specific to Brecon Beacons.
- reviewing data and key documents.
- interviewing 11 officers and 10 Members at the Authority.
- interviewing key officers in partner organisations including tourism officers from councils within the Park area.
- keeping in regular contact with the Land, Nature and Forestry Division in the Welsh Government.

Appendix 2

Sustainable Tourism in National Parks in Wales

While people visit the National Parks for many reasons, typically recreational use and admiration of natural beauty, these Parks also house irreplaceable ecosystems and living, breathing communities. Tourism is often therefore described as a problematic contradiction; where tourism attracts visitors, economic benefits, and educates the public, but their presence can pose a risk to the protection of the cultural and natural sites in a National Park. With the growing rate of tourism in National Parks, sustainable tourism – finding ways to encourage tourism growth while still preserving the culture and biodiversity of these areas – has become ever more important.

Through our work we know that the National Park Authorities collectively possess many years' experience of managing large numbers of visitors. They employ a range of staff who engage with visitors on a day-to-day basis, enhancing visitors' experiences, and helping to promote the importance of people enjoying but not adversely impacting on the natural environment. Despite this positive work, in the course of our reviews of sustainable tourism, we found some issues of concern that are common to all three National Park Authorities.

National Parks in Wales have to balance encouraging tourism with conserving the natural environment

The three National Parks have two statutory purposes and a statutory duty. The purposes and duty form the basis of all the work undertaken by each Authority and are the starting point for the plans and strategies they develop – **Exhibit 4**.

Exhibit 4: the statutory purposes and duty of Welsh National Park Authorities

Statutory Purpose	<ul style="list-style-type: none">• To conserve and enhance the natural beauty, wildlife and cultural heritage of the National Park.• To promote opportunities for public enjoyment and understanding of the special qualities of the National Park.
Statutory Duty	<ul style="list-style-type: none">• To foster the economic and social well-being of communities living within the National Park.

Source: 1995 Environment Act

The three National Park Authorities play an important role in managing the environment and encouraging visitors to enjoy the outdoors

It is estimated that the three Welsh National Parks are visited by 12 million people each year. Annually, three quarters of the population of Wales make a visit to a National Park benefiting from the great outdoors.

Recreation and tourism are important for both the local economy and for people's health and wellbeing. In addition, the National Parks also need to balance these requirements with their responsibilities for the preservation of land, animals, and habitats. If there is a conflict between these two purposes, greater weight is given to conservation than recreation.

All three Authorities recognised that COVID-19 and COP26 have brought the nature crisis into sharp focus – national parks are now visited more than they ever have been in the past but increased visitor numbers damage the biodiversity and unique environments of national parks. Intrinsically, balancing the needs of the two purposes is difficult and all National Park Authorities told us they struggle with this.

Respondents to our survey of tourism businesses located within Welsh National Parks told us that Authorities' have some clear strengths. These include conserving and protecting the natural environment; promoting the 'national – Welsh' role of Parks; and promoting activities and options when visiting the National Park area such as walking routes.

Tourist businesses mostly value the work of the National Parks but do not think they have got the balance right between their two statutory purposes

Tourism businesses we surveyed were also positive about the work of the National Park Authorities. For instance:

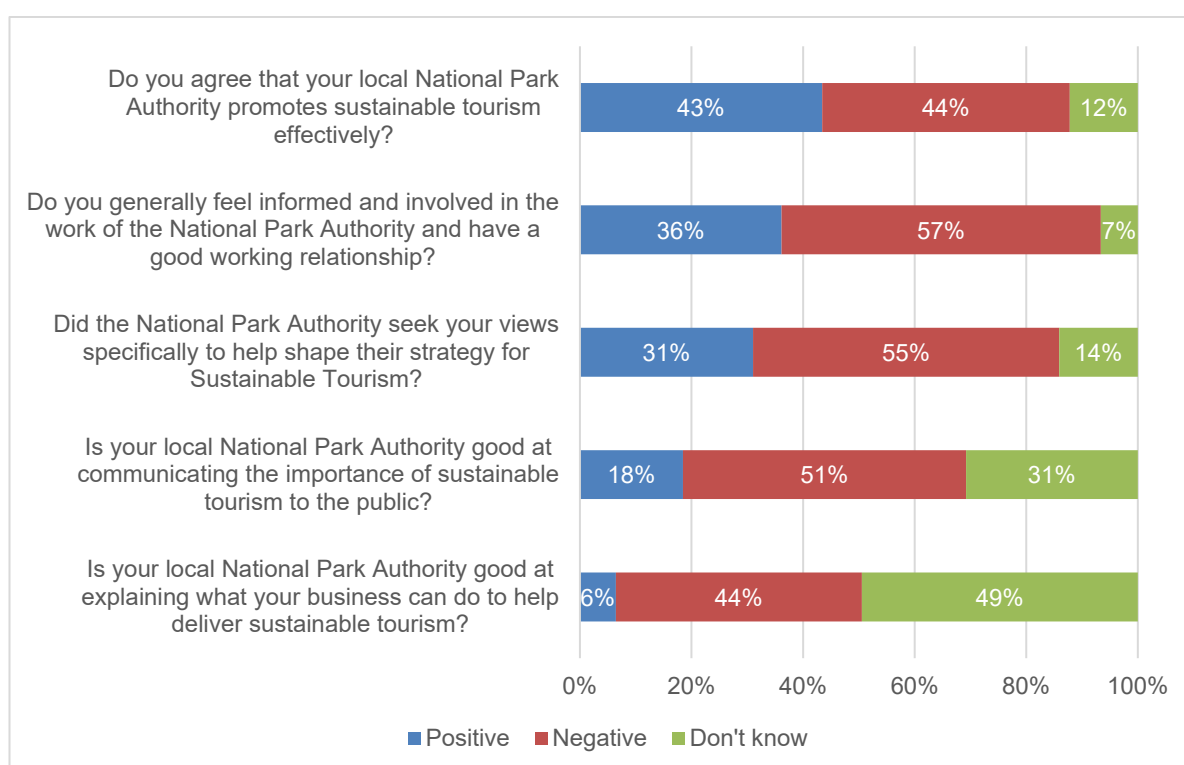
- 95% of those who responded to our survey agree or strongly agree that a well-managed National Park is important to attracting tourists;
- 92% of businesses also agree or strongly agree that conserving and protecting natural resources and tourism are compatible; and
- 72% of businesses think sustainable tourism is helping, or will help, their business.

However, only 29% of survey respondents agree that their local National Park Authority has got the balance right between protecting the natural environment and promoting enjoyment of the National Park at this time.

Our survey of tourism businesses indicates there is room for improvement in how National Park Authorities engage with the private sector (**Exhibit 5**). Just 31% of businesses responding to our survey stated that their local National Park Authority sought their views specifically to help shape their strategy for Sustainable Tourism. Around a third of businesses feel informed and involved in the work of the National Park and have a good working relationship with their local National Park Authority.

In addition, roughly half of businesses do not think that their local National Park Authority is good at explaining what businesses can do to help deliver sustainable tourism. Only 43% agree or strongly agree that their local National Park Authority promotes sustainable tourism effectively. Just 18% believe that their local National Park Authority is good at communicating the importance of sustainable tourism to the public – **Exhibit 5**.

Exhibit 5: tourism businesses’ views on National Park Authorities’ approach to sustainable tourism



Source: Audit Wales Survey of Welsh Tourist Businesses, January 2022⁵

Most tourist businesses seek to work sustainably and recognise the value of sustainable tourism

As well as promoting sustainable tourism, it is important businesses also work in a sustainable way. Today’s tourists are more aware of their actions and the environmental and social impacts they can have. So, they want to see more businesses actively doing something. Sustainable practices will also save money in the long run. Our survey found that:

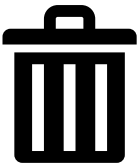
⁵ We received 281 responses to our survey. In respect of these specific questions, 280 responded to the first; 224 the second; 277 the third; 276 the fourth; and 279 the fifth.



Over 80% of businesses we surveyed promote visitors' understanding and awareness of the special qualities of the National Park



Roughly 70% of businesses we surveyed promote local culture and heritage – eg encouraging use of the Welsh language



Over 80% of tourist businesses we surveyed seek to reduce landfill waste and increase recycling



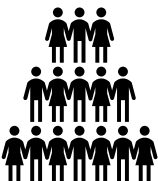
Just under 80% of tourist businesses we surveyed seek to reduce energy use



Just under 60% of tourist businesses we surveyed seek to reduce or conserve use of water



Just over 30% of tourist businesses we surveyed generate their own green energy



82% of tourist businesses we surveyed hire mainly (50%) local people (by local we mean people who live within 15 miles of the business)



60% of tourist businesses we surveyed source the majority (75%) of their supplies from local producers (by local we mean within 30 miles of the business)

National Park Authorities do not have the resources or powers to control or influence the number visiting, nor their behaviour and impact

Historically, National Park Authorities have not had a direct role in promoting tourism and marketing their destinations. And proportionally, they own very little land. They are one of many players within their area that have a role in tourism and protecting the environment. Too many of the strategic levers for sustainable tourism are vested in organisations and bodies who do not share the same vision or responsibilities for protecting the environment of the National Parks.

For instance, the funding and remit of National Park Authorities do not cover the direct marketing of tourism within National Parks and only Brecon Beacons National Park Authority is a destination management organisation. Both Pembrokeshire Coast and Snowdonia work with the local bodies who lead on this agenda: Visit Pembrokeshire and Gwynedd Council respectively. To be successful, therefore, the Authorities primarily focus on influencing what others do, but this is not easy and often not straightforward.

After two years of lockdowns and restrictions, tourist businesses are naturally keen to encourage visitors and benefit economically from an increase in tourism. This can however stress local infrastructure and create unintended problems of fly tipping, irresponsible car parking on verges, increased risk of accidents, growing anti-social behaviour and a negative impact on local communities in each of the National Parks.

Our reports on sustainable tourism in all three National Park Authorities in Wales emphasise the importance of each Authority communicating responsible use of the Parks to the public. To be most effective, this should be supported at a national level by the Welsh Government and relevant organisations such as National Resources Wales working together with the three National Park Authorities.

All three National Parks highlighted ongoing and longstanding problems with the local infrastructure in their areas, especially public transport, car parking, integrated active travel routes and responding to anti-social behaviour. Many of the statutory responsibilities for responding in these matters are, however, vested in partners, most notably local authorities and/or the Police, or private landowners, and there is often little that Authorities themselves can directly do.

However, other public bodies are often unable to respond effectively and consistently due to resource and other pressures. And many private landowners focus as much, if not more, on generating income rather than managing the impact of tourism on the local environment. The limitations in the statutory responsibilities of National Park Authorities mean that these matters often go unchecked and continue to cause problems particularly in local communities. With year-on-year growth in tourism, it is clear that this problem will be exacerbated.

All three National Park Authorities told us that the Welsh Government's annual funding cycle does not allow for long-term planning of, and investment into, infrastructure which supports sustainable tourism.



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